



GIEWS Country Brief The Republic of Kenya

Reference Date: 12-June-2023

FOOD SECURITY SNAPSHOT

- **Critical food security situation due to unprecedented multi-season drought**
- **Mixed production prospects for 2023 “long-rains” main season crops**
- **Above-average rangeland conditions benefiting livestock**
- **Prices of maize at high levels due to tight availability and high fuel costs**

Critical food security situation due to unprecedented multi-season drought

According to the Integrated Food Security Phase Classification (IPC), in the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering most of the country, about 5.4 million people are estimated to face severe acute food insecurity (IPC Phase 3 [Crisis] and IPC Phase 4 [Emergency]) in the March to June period. This figure, which includes about 4.2 million people in IPC Phase 3 (Crisis) and 1.2 million in IPC Phase 4 (Emergency), amounts to 32 percent of the analysed population, compared to 27 percent in the same period of the previous year. The areas most affected by acute food insecurity, classified as IPC Phase 4 (Emergency) are Turkana, Marsabit, Mandera, Wajir and Garissa counties in the north and northeast, where pastoral livelihoods prevail.

The high prevalence and severity of acute food insecurity are mainly due to the lingering impact of a prolonged and severe drought, which affected livelihoods between late 2020 and early 2023 and resulted in consecutive failed harvests and widespread livestock deaths.

Mixed production prospects for 2023 “long-rains” main season crops

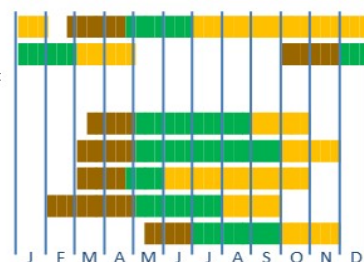
In unimodal rainfall major growing areas of Central, Rift Valley and Western provinces, the 2023 “long-rains” main season crops, for harvest from October, were planted in March. Average to above-average rainfall amounts between March and late May benefited crop establishment and development, and current vegetation conditions are above average. However, according to the latest weather forecasts by the Intergovernmental Authority on Development (IGAD) Climate Predictions and Application Centre (ICPAC), below-average precipitation amounts are

Kenya

Crop Calendar

(*major foodcrop)

Barley (long rains)
Barley, maize*, millet, sorghum and beans (short rains)
Beans (long rains)
Maize* (long rains)
Millet (long rains)
Sorghum (long rains)
Wheat* (long rains)

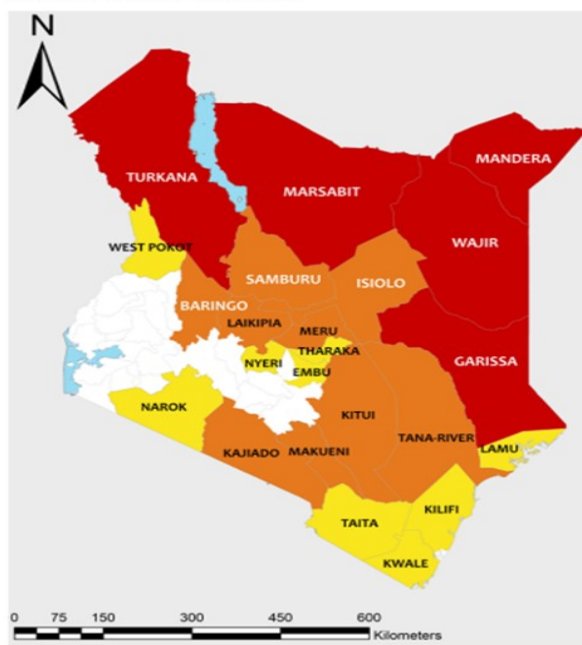


Lean period

Sowing (brown square)
Growing (green square)
Harvesting (yellow square)

Kenya - Integrated Food Security Phase Classification (IPC)

Projection March-June 2023



1 - Minimal (green square)
2 - Stressed (yellow square)
3 - Crisis (orange square)
4 - Emergency (red square)
5 - Famine (dark red square)
Areas not analysed (white square)

expected between June and September, with a likely negative impact on yields.

In bimodal rainfall southeastern and coastal marginal agriculture areas, the 2023 “long-rains” crops will be harvested from July and production is expected at below-average levels. The March-May rainy season was characterized by an erratic temporal distribution, with below-average rainfall amounts received during most of the growing period. Torrential rains occurred in late April-early May and accounted for more than half of the seasonal cumulative rains. The erratic precipitation had a negative impact on vegetation conditions and, as of late May, between 20 and 30 percent of cropland was affected by severe drought in Taita Taveta, Kilifi and Kwale counties (ASI map for cropland). In addition, planted area was constrained by high prices of inputs, including fuel and fertilizers, coupled with a low purchasing power of farmers due to consecutive poor harvests.

Above-average rangeland conditions benefiting livestock

In northern and northeastern pastoral areas, abundant March-May “long-rains”, estimated at more than twice the long-term average, substantially regenerated rangeland resources and resulted in a significant improvement of vegetation conditions, which are currently well above average (see ASI map for grassland). Livestock trekking distances from grazing fields to watering points declined by 30-75 percent between February and April, when they were up to 65 percent shorter than average. Due to the abundant pasture and water availability, livestock body conditions substantially improved and, as of April, they were reported to be fair to good in all ASAL counties. Although milk production has generally increased, it was still well below average in 17 of the 23 ASAL counties in April 2023 due to low conception rates and the decline of herd sizes caused by the death from starvation of 2.6 million animals and distress sales.

Prices of maize at high levels due to tight availability and high fuel prices

Prices of maize are at high levels across the country due to reduced carryover stocks following the 2022 below-average cereal production and reduced imports from Uganda. High fuel prices inflating production and transport costs, further contributed to the high food prices.

In Nakuru and Eldoret markets, located in southwestern key growing areas of Rift Valley Province, maize prices increased seasonally by 10-15 percent between February and April 2023, while in the capital, Nairobi, prices increased by about 30 percent over the same period. Prices in April were between 50 and 80 percent above their year-earlier levels.

In southeastern and coastal marginal agriculture areas, prices of maize followed similar patterns. In Kitui, Makueni, Kwale and Lamu counties, prices increased by 20-50 percent between February and April 2023, when they were 45-75 percent higher than their elevated year-earlier values.

In pastoral areas, livestock prices increased by 15-65 percent between February and April 2023 as improved pasture and water availability had a positive impact on livestock body condition and, in April, they were between 10 and 45 percent above the very low values of one year earlier. In these areas, maize prices in April were 25-75 percent above their year-earlier levels, mainly due to a poor performance of the local harvests in 2022, coupled with

Kenya

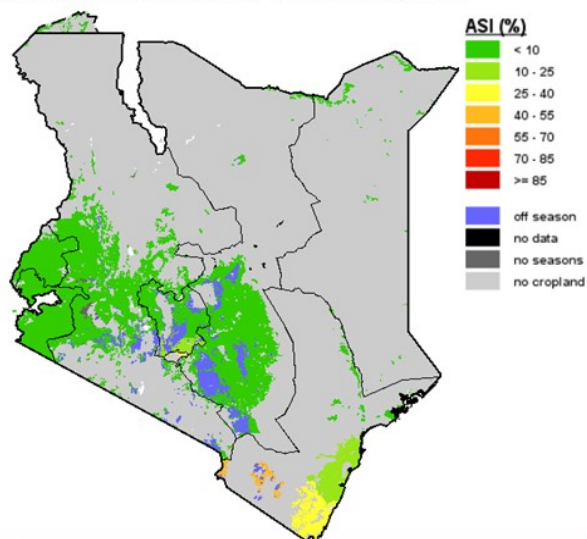
Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Maize	3 534	3 100	3 200	3.2
Wheat	304	250	300	20.0
Sorghum	227	200	200	0.0
Others	314	331	374	13.0
Total	4 380	3 881	4 074	5.0

Note: Percentage change calculated from unrounded data.

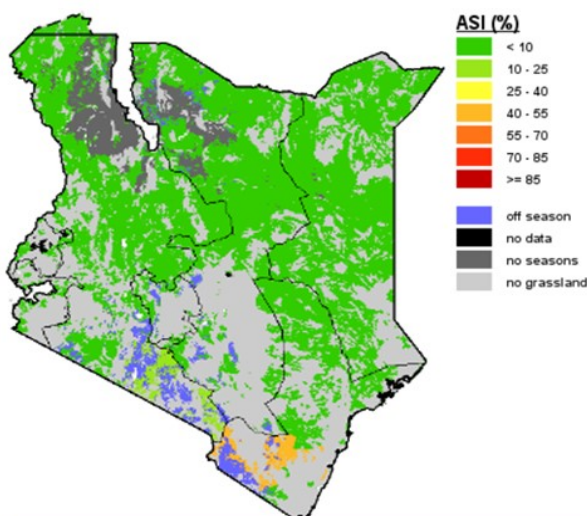
Kenya - Agricultural Stress Index (ASI) for cropland

from start of season 1 to dekad 2, May 2023



Kenya - Agricultural Stress Index (ASI) for grassland

from start of season 1 to dekad 2, May 2023

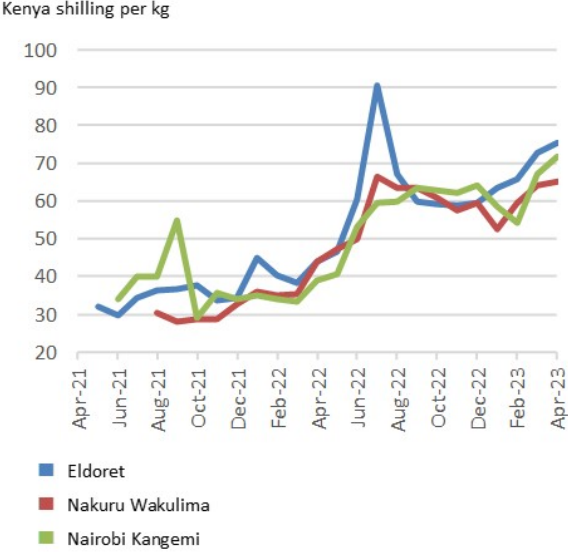


sustained demand for animal feed due to severe pasture shortages until March 2023. With cereal prices having increased over the past 12 months more sharply than livestock prices, the livestock-to-cereal terms of trade for pastoralists, already low in mid-2022, have further deteriorated over the last 12 months and, in April 2023, they were 5-30 percent lower than one year earlier. In Samburu County, the equivalent in maize of a medium-sized goat declined from 47 kg in April 2022 to 40 kg in April 2023.

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Kenya

Wholesale prices of maize (white)



This brief was prepared using the following data/tools:
 FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.
 FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.
 FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.
 Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief Kenya

Reference Date: 15-July-2022

FOOD SECURITY SNAPSHOT

- **Critical food security situation, with about 4.1 million people estimated severely food insecure between March and June 2022**
- **Severe pasture and water shortages, resulting in widespread livestock deaths**
- **Mixed production prospects for 2022 “long-rains” main season harvest**
- **Prices of maize at high levels, especially in drought affected marginal agriculture areas**
- **Deteriorating terms of trade constrain food access for pastoralists**

Critical food security situation due to unprecedented multi-season drought

In the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering about 80 percent of the country, the failure of the 2022 March–May “long-rains” exacerbated drought conditions prevailing since late 2020, causing severe crop and livestock losses, and resulting in a significant deterioration of an already difficult food security situation.

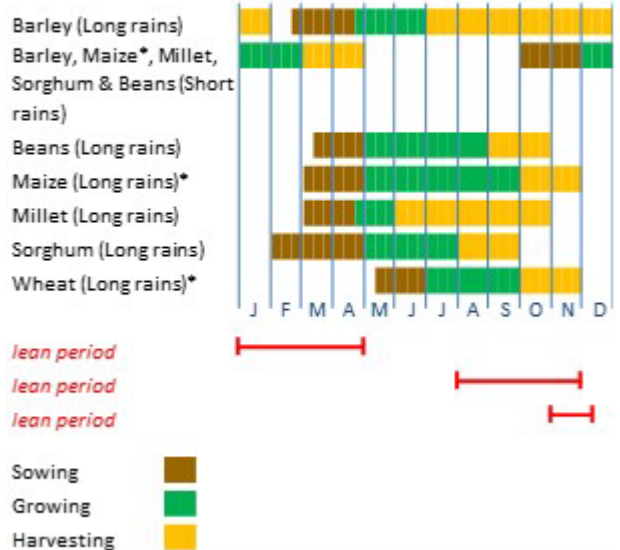
In the March to June period, about 4.1 million people (27 percent of the analysed population) were estimated to be severely food insecure (IPC Phase 3 [Crisis] and Phase 4 [Emergency]). This figure, which includes about 3 million people in IPC Phase 3 (Crisis) and 1.1 million in IPC Phase 4 (Emergency), is about 40 percent higher than the same time last year. The areas most affected by food insecurity are Turkana, Samburu, Marsabit and Baringo counties in the northwest and Isiolo, Mandera and Wajir counties in the northeast, areas with predominantly pastoral livelihoods, where between 45 and 70 percent of the local population is severely food insecure.

As the June–September dry season has just started and forecasts point to a poor October–December “short-rains” season, food insecurity conditions are expected to further deteriorate. Food and livelihood assistance needs to be urgently scaled up to avert the collapse of rural livelihoods, especially in pastoral areas.

Kenya

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Severe pasture and water shortages resulting in widespread livestock deaths

Prolonged drought conditions are significantly affecting rangeland resources in northern pastoral areas and central and southern agropastoral areas, especially in Marsabit County in the north, Mandera, Wajir and Isiolo counties in the northeast and Samburu and Laikipia counties in the centre.

Severe rainfall deficits during the March-May rainy season impaired pasture regeneration in several central, northern and eastern pastoral and agropastoral areas. As of late July, between 25 and more than 85 percent of the grassland was affected by severe drought. Livestock trekking distances from grazing fields to watering points have increased to very high levels and, in May, they were between 30 and 120 percent longer than average. Livestock body conditions are currently poor due to lack of pasture and water, and herd sizes have significantly declined due to the death from starvation of about 1.5 million animals and due to widespread distress sales.

Milk production has declined to very low levels and, in May, it was estimated at between 30 and 80 percent below the average, with negligible levels recorded in Turkana and Samburu counties.

Mixed production prospects for 2022 “long-rains” main season crops

In unimodal rainfall major growing areas of Central, Rift Valley and Western provinces, the 2022 “long-rains” main season crops, to be harvested from September, were planted in March. Although cumulative rains between March and June were 10 to 20 percent below the average, they allowed good crop establishment and development. According to the latest weather forecasts by the IGAD Climate Predictions and Application Centre (ICPAC), above average precipitation amounts are expected between June and September, with a likely positive impact on crops. However, the sharp increase in international prices of fuel and fertilizers, caused by the war in Ukraine, is expected to constrain yields and inflate production and transportation costs.

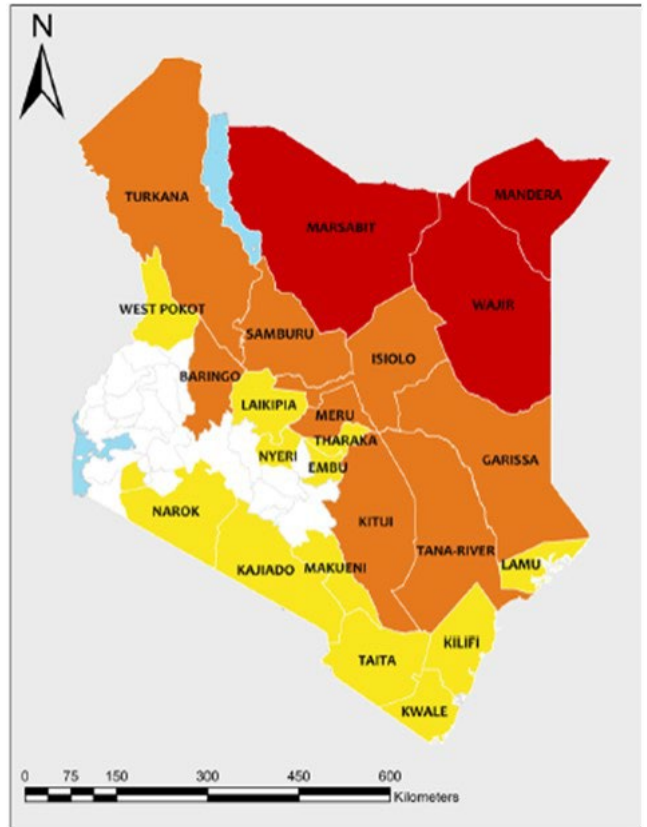
In bimodal rainfall southeastern and coastal marginal agriculture areas, the “long rains” harvest has recently started and will be concluded in August. Dry conditions prevailed during most of the growing period, with significant amounts of precipitation received only between late April and early May. Although these rains had a positive impact on vegetation conditions, crop recovery was modest. As of the second dekad of July, up to 85 percent of the cropland was affected by drought (ASI map for cropland) and cereal production prospects are unfavourable, likely leading to a fourth consecutive poor harvest in these areas.

Prices of maize at high levels, especially in drought-affected marginal agriculture areas

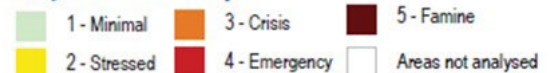
Prices of maize are at high levels across the country due to reduced availabilities and high fuel prices inflating production and transportation costs.

In Nakuru and Eldoret markets, located in southwestern key growing areas of Rift Valley Province, maize prices increased

Projection March-June 2022



Key for the Map



Kenya

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
		000 tonnes		percent
Maize	3 623	3 780	3 250	-14.0
Wheat	284	300	250	-16.7
Sorghum	222	250	240	-4.0
Others	308	361	314	-13.0
Total	4 437	4 691	4 054	-13.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

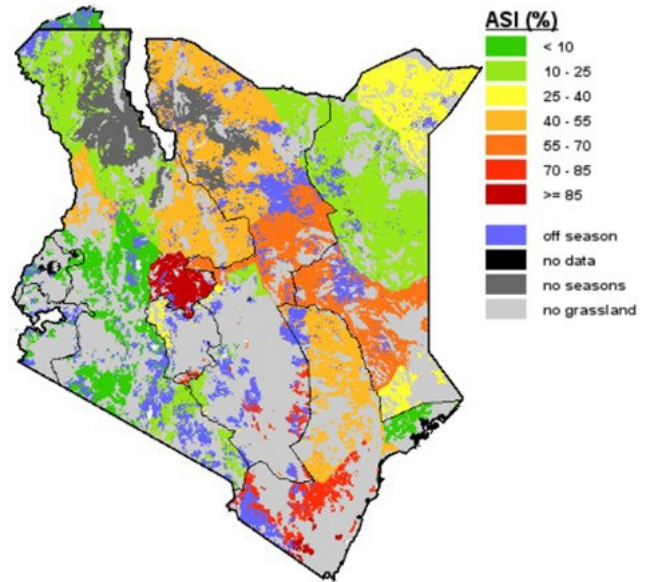
seasonally by 5 to 10 percent between February and April. Prices in April were 25 to 40 percent above their year earlier levels due to reduced carryover stocks following a below average cereal production in 2021.

In drought affected southeastern and coastal marginal agriculture areas, sharper increases and higher levels were recorded, due to the dismal performance of the 2022 “long-rains” season and low availabilities following three below average harvests. In coastal Taita Taveta County, prices of maize rose by 22 percent between February and May, when they were 54 percent higher than a year earlier. Similarly, in southeastern Meru North and Embu counties, prices increased by 36 to 40 percent over the same period and, in May, they were 80 to 90 percent higher than one year earlier.

In pastoral and agropastoral areas, livestock prices declined significantly as the prolonged drought conditions had a negative impact on livestock body conditions and, in May, they were between 10 and 30 percent below the already low values of one year earlier. In these areas, maize prices in May were 5 to 25 percent above their year earlier levels, mainly due to a poor performance of the local “long rains” harvests, coupled with sustained demand for animal feed due to pasture shortages. As a result, the livestock to cereal terms of trade for pastoralists, already low in mid-2021, have further deteriorated over the last 12 months and, in May, they were 10 to 45 percent lower than one year earlier. In Marsabit County, the equivalent in maize of a medium sized goat declined from 78 kg in May 2021 to 51 kg in May 2022.

Kenya - Agricultural Stress Index (ASI) for grassland

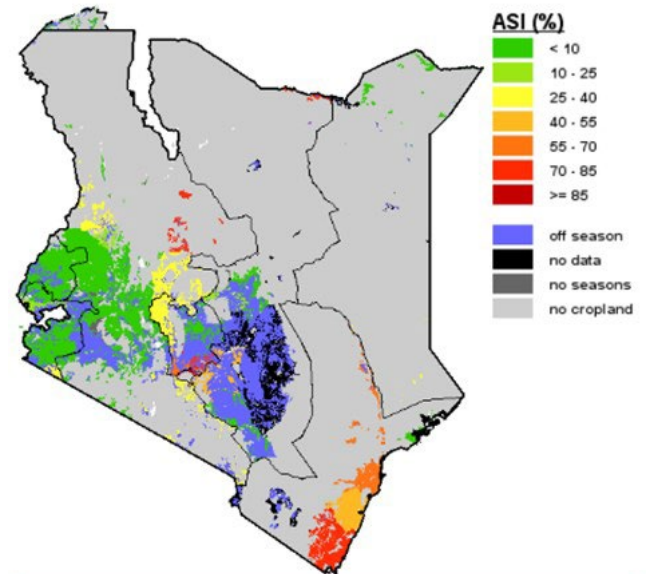
from start of season 1 to dekad 3, June 2022



Source: FAO/GIEWS Earth Observation System.

Kenya - Agricultural Stress Index (ASI) for cropland

from start of season 1 to dekad 3, June 2022



Source: FAO/GIEWS Earth Observation System.

Kenya

Wholesale prices of maize

Kenya shilling per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kenya

Reference Date: 19-October-2021

FOOD SECURITY SNAPSHOT

- **Below-average 2021 “long-rains” main season harvest due to poor rains**
- **Poor rangeland conditions affecting pastoral livelihoods**
- **Prices of maize at low levels in key producing areas and in capital, Nairobi**
- **Deteriorating terms of trade constrain food access for pastoralists**
- **Food security situation deteriorated over last 12 months**

Below-average 2021 “long-rains” main season harvest due to poor rains

Harvesting of the bulk of the 2021 “long-rains” main season cereal crops has recently started in major uni-modal rainfall growing areas of Central, Rift Valley and Western provinces. Cumulative seasonal rains were average to above average but had an erratic temporal distribution. Below-average precipitation amounts in March, which forced several farmers to re-plant, were followed by above-average rains in April and May, and by poor rains during most of June, which affected maize during the critical flowering stage. Subsequently, improved precipitation between July and September lifted crop prospects, but some damage was irreversible. As a result, maize production is officially forecast at 8 percent below average.

More substantial output contractions were recorded in bi-modal rainfall southwestern and southeastern agro-pastoral areas as well as coastal marginal agriculture areas, where crops were harvested in July and August. The March to May rainy season was characterized by a delayed onset, below-average cumulative amounts and an early cessation, with a negative impact on yields. According to official estimates, maize production in these areas is about 0.4 million tonnes, 35 percent below average, with a dismal performance reported in coastal areas (ASI map) due to prolonged dryness and Fall Armyworm infestations.

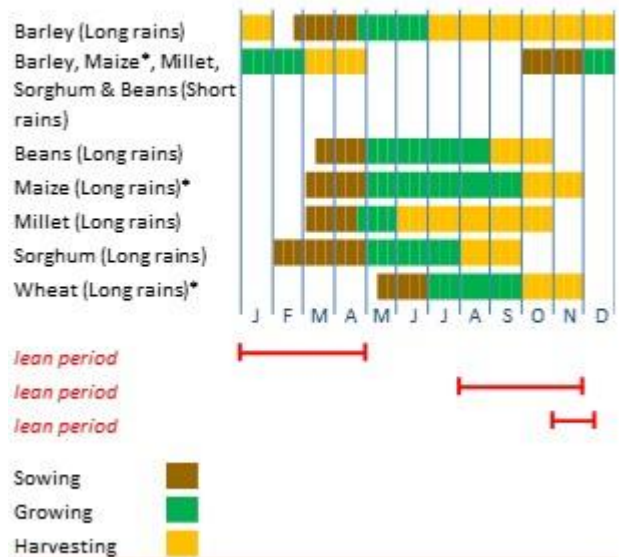
The total “long-rains” maize production is officially put at 2.88 million tonnes, 5 to 10 percent below average.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), rainfall amounts are expected to be below average between October and December 2021. This may have a negative impact on the

Kenya

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

performance of the 2021 secondary “short-rains” crops to be harvested at the beginning of 2022.

Aggregate cereal production in 2021 (including an average output of the “short-rains” harvest) is tentatively forecast at about 4.3 million tonnes, some 12 percent down from 2020 and about 3 percent below the average of the previous five years.

Poor rangeland conditions affecting pastoral livelihoods

Grazing resources in most northern pastoral areas and central and southern agro-pastoral areas have been severely affected by two consecutive poor rainy seasons since October 2020. As of September 2021, drought conditions have been reported in several counties, with particular concern for Marsabit County in the northwest and Mandera, Garissa, Isiolo and Wajir Counties in the northeast.

Rainfall deficits during the March to May rainy season severely constrained the regeneration of rangeland resources, resulting in a fast depletion during the June to September dry season. In several counties, livestock trekking distances to watering points from grazing fields have increased in recent months and, in August 2021, they were 25 to 55 percent longer than average. Livestock body conditions are below average and herd sizes have significantly declined due to decreased animal births and distress sales. Milk production has declined to low levels in pastoral and agro-pastoral livelihood zones, where in August it was about 25 and 45 percent below average, respectively.

Prices of maize at low levels in key producing areas and in capital, Nairobi

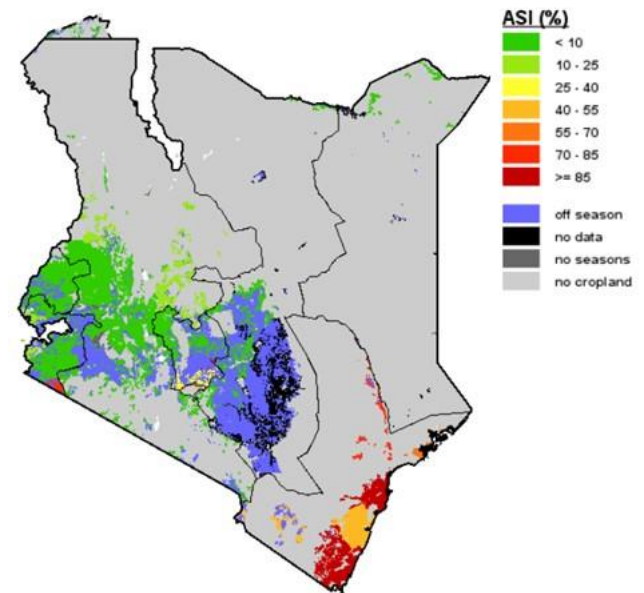
In key producing areas and in the capital, Nairobi, prices of maize remained mostly stable in recent months and, in September, they were at the same levels of one year earlier. Prices were kept at low levels by adequate domestic availabilities mainly due to stocks from the above-average 2020 cereal production and sustained imports from Uganda and the United Republic of Tanzania. By contrast, in Mombasa, a large urban centre located on the coast, prices of maize surged by about 25 percent in September, mainly due to the particularly poor performance of the “long-rains” harvest in coastal areas.

In pastoral and agro-pastoral areas, prices of livestock declined by 10 to 30 percent between August 2020 and August 2021 as the poor performance of the last two rainy seasons had a negative impact on livestock body conditions. The sharpest price declines are recorded in northwestern Turkana, Samburu and Marsabit counties and in northeastern Garissa and Wajir counties, which faced the most severe and prolonged drought conditions. In these areas, maize prices in August were 5 to 25 percent above their year-earlier levels, mainly due to a poor performance of the local “long-rains” harvests, coupled with sustained demand for animal feed due to pasture shortages. As a result, the terms of trade for pastoralists deteriorated over the last 12 months and, in August, they were 10 to 45 percent lower than one year earlier. For example, in Wajir County, the equivalent in maize of a medium-sized goat declined from 71 kg in October 2020 to 46 kg in October 2021.

Prices of milk in August were on average about 80 percent higher on a yearly basis due to reduced supply.

Kenya - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, June 2021



Source: FAO/GIEWS Earth Observation System.

Kenya

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	3 684	4 000	3 500	-12.5
Wheat	277	300	260	-13.3
Sorghum	198	250	240	-4.0
Others	282	320	294	-8.1
Total	4 441	4 870	4 294	-11.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Food security situation deteriorated over last 12 months

In the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering about 80 percent of the country, about 2.1 million people were estimated to be severely food insecure (IPC Phase 3 [Crisis] and Phase 4 [Emergency]) in the July to October 2021 period. This figure, which includes about 1.8 million people in IPC Phase 3 (Crisis) and 355 000 people in IPC Phase 4 (Emergency), is three times the estimate of the same period in 2020. The areas most affected by food insecurity are northern and eastern Turkana, Marsabit, Isiolo, Mandera, Wajir, Garissa, Tana River and Baringo counties, which are regions with predominantly pastoral livelihoods, where between 20 to 40 percent of the population is severely food insecure.

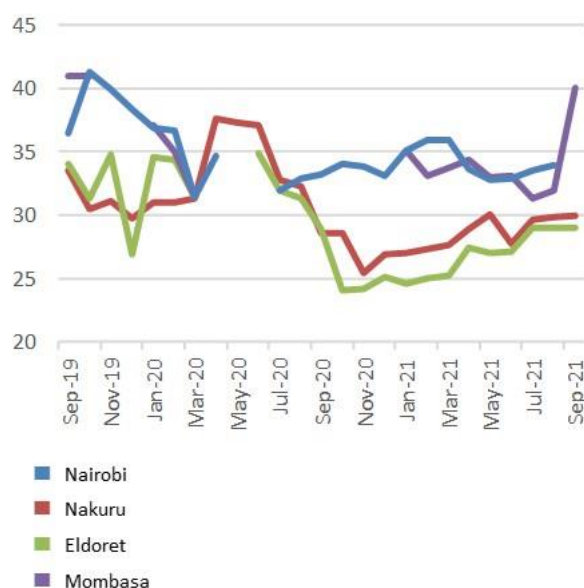
The deterioration of the food security situation is mainly due to the negative impact of two consecutive poor rainy seasons since October 2020 on crop and livestock production and on on-farm income-earning opportunities. The impact of the measures implemented to curb the spread of the COVID-19 pandemic on economic activities exacerbated food insecurity. Movement restrictions measures affected farming activities through reduced availability of labour and agricultural inputs, also constraining cross-border trade and off-farm income-earning opportunities including petty trade, charcoal and firewood sales.

The food security situation is expected to deteriorate in the coming months, with 2.4 million people estimated to be severely food insecure in the November 2021 to January 2022 period, under the assumption of the forecasted below-average October to December “short-rains”.

Kenya

Wholesale prices of maize

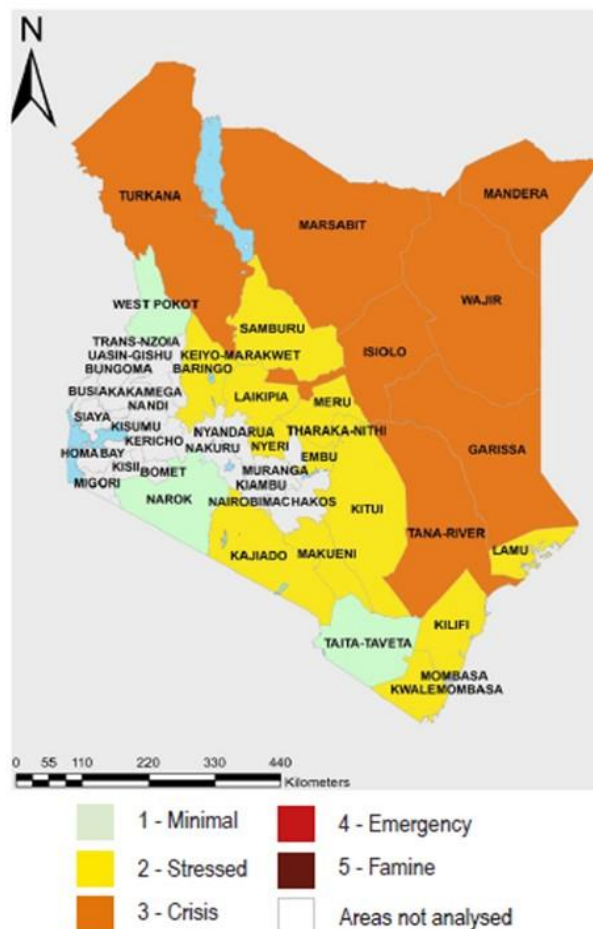
Kenyan Shilling per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kenya - Integrated Food Security Phase Classification (IPC)

July-October 2021



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GIEWS Country Brief Kenya

Reference Date: 03-June-2021

FOOD SECURITY SNAPSHOT

- Mixed production prospects for 2021 “long-rains” main season crops
- Above-average 2020 cereal production due to favourable “long-rains” in key producing areas
- Poor rangeland conditions affecting pastoral livelihoods
- Prices of maize at low levels in key producing areas and in main urban centres
- Food security situation deteriorating in 2021 due to multiple shocks

Mixed production prospects for 2021 “long-rains” main season crops

In uni-modal rainfall major growing areas of Central, Rift Valley and Western provinces, planting of the 2021 “long-rains” main season crops, for harvest from September, normally starts in March. An early onset of seasonal rains in February was followed by below-average precipitation in March, which disrupted sowing operations and delayed them by two to three weeks.

Subsequently, above-average rains in April and May benefited planting and germination of crops, and current vegetation conditions are above average. According to the latest weather forecasts by the IGAD Climate Predictions and Application Centre (ICPAC), above-average precipitation is expected in these areas between June and September, with a likely positive impact on yields.

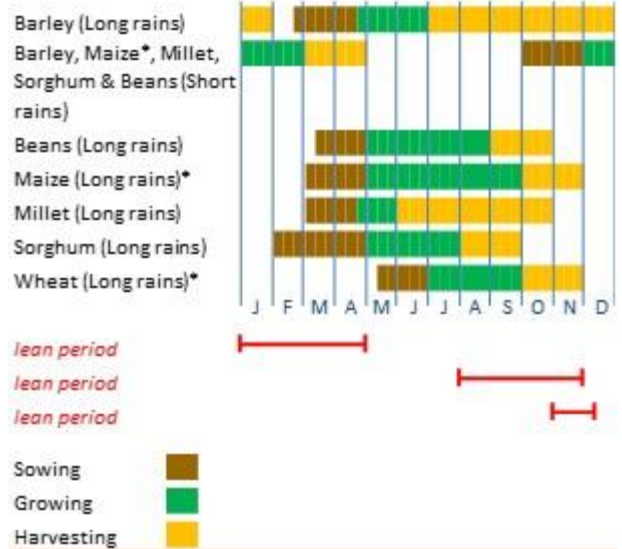
In bi-modal rainfall southeastern and coastal marginal agriculture areas, crops are expected to be harvested from July and they have been affected by poor rains, with cumulative amounts between March and mid-May estimated at 30-75 percent below average. Germination failures have been reported in several areas and widespread replanting occurred in April. Currently, vegetation conditions are generally poor and between 10 and 55 percent of the crop land is affected by drought conditions (Agricultural Stress Index map). With seasonal rains usually subsiding in early June in these areas, late planted and replanted crops are unlikely to reach maturity and cereal production is expected at below-average levels.

In late 2019, the country suffered the worst outbreak of desert locusts in 70 years. The infestations have been successfully contained by large scale control operations carried out by the

Kenya

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Government with the support of FAO, which averted widespread crop and pasture losses in 2020, with localized damages recorded mostly in northern pastoral areas. Poor October-December 2020 “short-rains” and March-May 2021 “long-rains” have severely constrained insect reproduction and current infestation levels are significantly lower compared to one year ago. The last swarm was treated on 23 April and, since then, no further swarms have been reported. Limited breeding could occur in northern areas that received improved rains in May and monitoring and control operations must be maintained.

Above-average 2020 cereal production due to favourable “long-rains” in key producing areas

In bi-modal southeastern and coastal marginal agricultural areas, harvesting of the secondary 2020/21 “short-rains” season crops was concluded in mid-March. The area planted with maize is officially estimated at about 260 000 hectares, 16 percent below the average of the previous five years, with farmers limiting plantings due to unfavourable weather forecasts and to constrained access to inputs, including certified seeds and fertilizers caused by COVID-19-related restrictions. The October-December 2020 rains were characterized by below-average amounts and erratic distribution, with a negative impact on yields, which were further reduced by localized losses due to desert locusts. Overall, maize output is estimated at 127 000 tonnes, about 25 percent below average, with the sharpest output contractions recorded in coastal areas, where rainfall deficits were more severe.

Earlier in the year, the main “long-rains” crops, accounting for the bulk of the national cereal production, benefited from abundant seasonal rains over the key producing areas and maize production is officially estimated at 3.78 million tonnes, 10-15 percent above average.

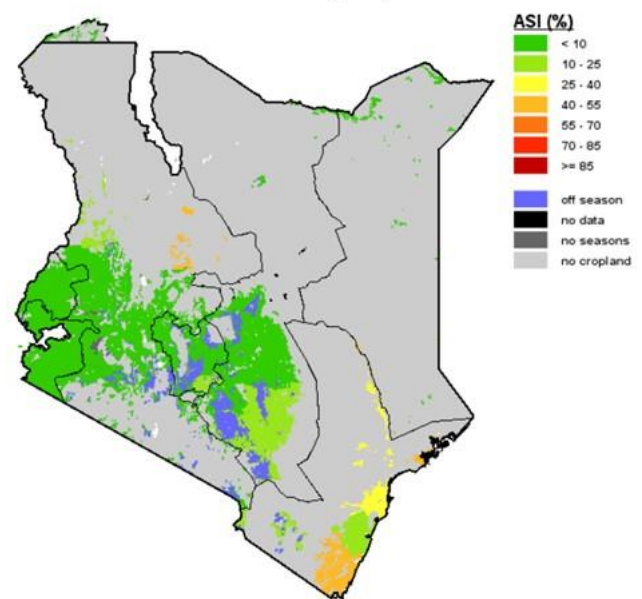
The 2020 aggregate cereal production is estimated at 4.8 million tonnes, similar to the previous year and about 10 percent above the average of the previous five years.

Poor rangeland conditions affecting pastoral livelihoods

Grazing resources in most pastoral and agro-pastoral areas across the country have been severely affected by two consecutive poor rainy seasons (October-December 2020 “short-rains” and March-May 2021 “long-rains”). According to the government’s National Drought Management Authority, as of April, out of the 14 counties located in these livelihood zones, seven were declared to be in “drought alert phase” and three in “drought alarm phase”. The counties in “drought alarm phase” are Turkana and Marsabit in the northwest and Mandera County in the northeast. The substantial rainfall deficits and localized pasture losses due to locusts resulted in the deterioration of rangeland conditions to poor levels (Vegetation Health Index map). Due to significant forage and water deficits, livestock trekking distances to watering points from grazing fields have increased in recent months in most counties and, in April, they were between 30 and 100 percent longer than average, with record distances reported in Turkana and Isiolo counties. Livestock body conditions are generally below average and some animal deaths due to starvation have been reported in Turkana and Baringo counties. Milk production has declined to low levels and, in April, it was between 25 and 75 percent below average.

Kenya - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, May 2021



Source: FAO/GIEWS Earth Observation System.

Kenya

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	3 649	3 897	4 000	2.6
Wheat	264	366	300	-18.0
Sorghum	185	288	250	-13.2
Others	272	386	320	-17.0
Total	4 371	4 937	4 870	-1.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Heavy showers received in May had some localized positive impacts on rangeland conditions, but improvements are likely to be short-lived as seasonal rains usually subside in early June.

Prices of maize at low levels in key producing areas and in main urban centres

In key producing areas and in main urban centres, including in the capital, Nairobi, prices of maize in May were generally at low levels, 10-20 percent lower than a year earlier, due to adequate domestic availabilities following the above-average 2020 maize output.

In northern and eastern pastoral areas, prices of livestock declined between October 2020 and April 2021 as the poor performance of the last two rainy seasons had a negative impact on livestock body conditions and, in April, they were below their year-earlier levels. In Turkana, Marsabit, Wajir and Garissa counties, prices of goats in April 2021 were 20-40 percent lower than one year earlier.

With cereal prices 5-10 percent above their year-earlier levels, mainly due to the poor performance of the “short-rains” harvest, the terms of trade for pastoralists deteriorated in northern and eastern areas over the last 12 months and, in April, they were 10-45 percent lower than one year earlier. For example, in Wajir County, the equivalent in maize of a medium-sized goat declined from 70 kg in October 2020 to 51 kg in March 2021.

Food security situation deteriorating in 2021 due to multiple shocks

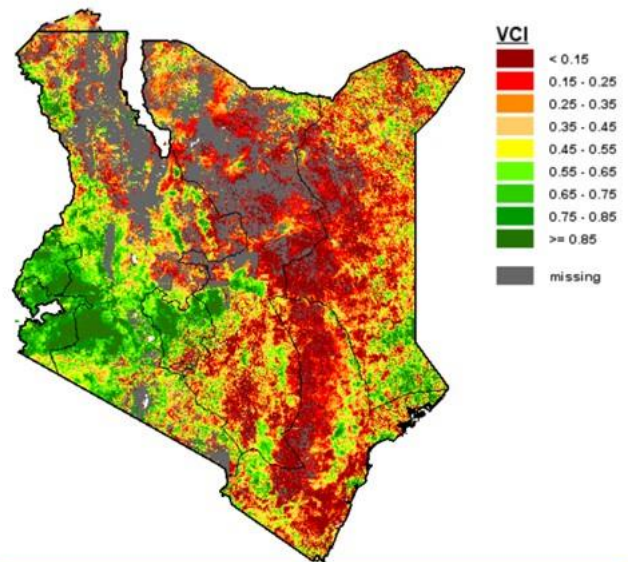
In the 23 counties classified as rural Arid and Semi-Arid Lands, covering about 80 percent of the country’s landmass, about 2 million people were estimated to be severely food insecure (IPC Phase 3: “Crisis” and Phase 4: “Emergency”) in the March-May 2021 period. This figure, which includes 1.77 million people in IPC Phase 3: “Crisis” and 239 000 people in IPC Phase 4: “Emergency”, is about 40 percent higher than the estimate of 1.4 million in February 2021 and more than twice the estimate of 985 000 individuals in mid-2020. The substantial deterioration of the food security situation is mainly due to the negative impact on crop and livestock production and on on-farm income earning opportunities of the poor March-May “long-rains” in northern pastoral, southeastern and coastal marginal agricultural areas, to the measures implemented to curb the spread of the COVID-19 pandemic which affected off-farm income earning opportunities, including petty trade, charcoal and firewood sales, and to localized but significant locust-induced pasture losses.

The food security situation is of significant concern also in urban areas. Here, the restrictive measures introduced in early 2020 to tackle the COVID-19 pandemic have severely affected poor households, which mainly rely on daily wages earned through casual labour, petty trading, food vending, construction activities and domestic work. Despite the phasing out of some measures since June 2020, about 1 million people were estimated to be food insecure in urban informal settlements between October and December 2020, due to a substantial decline in income coupled with increasing food prices.

In late 2020, in response to an increase of COVID-19 cases, some measures were reintroduced and, in March, additional

Kenya - Vegetation Condition Index (VCI)

April 2021

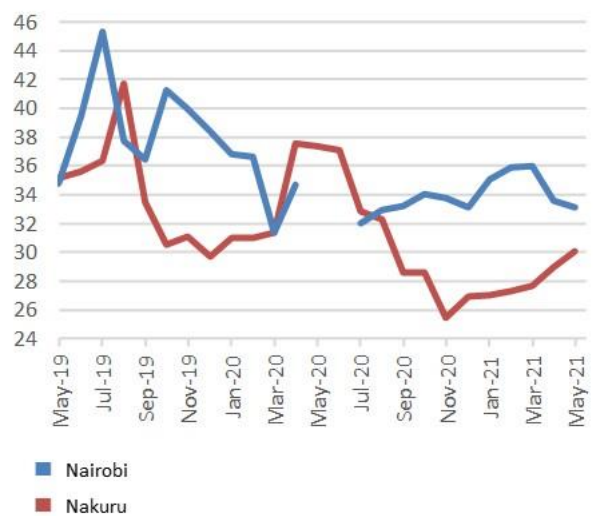


Source: FAO/GIEWS Earth Observation System.

Kenya

Wholesale prices of maize

Kenyan Shilling per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

restrictions were implemented in Nairobi, Kiambu, Machakos, Kajiado and Nakuru counties, which have exacerbated food insecurity.

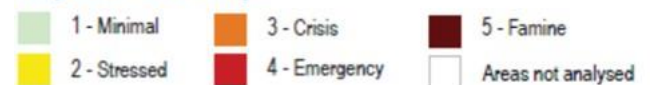
Kenya - Integrated Food Security Phase Classification (IPC)

Projection March-May 2021



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Key for the Map





GIEWS Country Brief Kenya

Reference Date: 16-October-2020

FOOD SECURITY SNAPSHOT

- Above-average 2020 “long-rains” main season harvest due to abundant seasonal rains
- Sustained control measures averted widespread crop and pasture losses due to ongoing desert locust outbreak
- Above-average rangeland conditions benefit livestock body condition
- Prices of maize declined in recent months in key producing areas, but slightly increased in capital, Nairobi
- Food security situation improved in rural areas, while it deteriorated in urban areas due to restrictive measures to contain COVID-19 pandemic

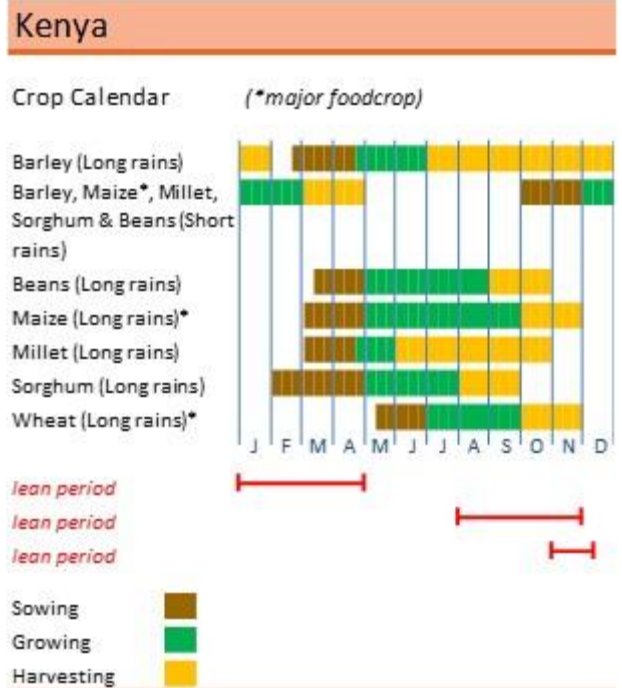
Above-average 2020 “long-rains” main season harvest due to abundant seasonal rains

Harvesting of the bulk of the 2020 “long-rains” cereal crops has recently started in major uni-modal rainfall growing areas of Central, Rift Valley and Western provinces. In these areas, the rainy season had an early onset in February and the first two months were characterized by exceptionally abundant rains, with cumulative amounts estimated at two-three times the long-term average. The torrential rains disrupted land preparation and sowing activities, and triggered flooding which resulted in localized crop losses. However, above-average and well-distributed rains for the remainder of the growing period were favourable for crop development and an above-average maize production is expected.

In bi-modal rainfall southeastern marginal agriculture areas, the “long-rains” harvest concluded in August. Seasonal rains were particularly abundant also in these areas and the cropping season had a favourable outcome. However, flood-related losses and yield reductions due to an early cessation of the seasonal rains in early May in some areas resulted in localized crop production shortfalls.

Overall, according to official estimates, the 2020 “long-rains” maize production, accounting for about 80 percent of the yearly output, is forecast at 3.2 million tonnes, about 10-15 percent above the average.

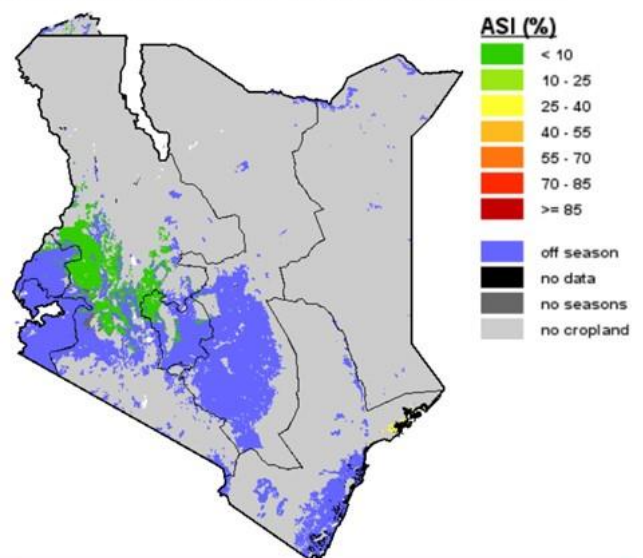
According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF), the October-December “short-rains” are expected at below-average levels, with a likely negative impact



Source: FAO/GIEWS, FEWSNET.

Kenya - Agricultural Stress Index (ASI) for cropland

from start of season 1 to dekad 2, September 2020



Source: FAO/GIEWS Earth Observation System.

on secondary season cereal crops, to be harvested from February 2021.

In December 2019, the country suffered the worst outbreak of desert locusts in 70 years. The infestations, that by February were affecting 29 counties, have been successfully contained by large-scale control operations carried out by the Government with the support of FAO, which averted widespread crop and pasture losses. In September 2020, a few swarms persisted only in parts of northwestern Turkana, Marsabit, Samburu and Laikipia counties. However, as the numbers of swarms are increasing in Yemen, Ethiopia and Somalia, and prevailing winds are shifting southwards, infestation levels are likely to increase in late 2020. Sustained surveillance and control efforts are, therefore, still needed.

Above-average rangeland conditions benefit livestock body condition

In northern and northeastern pastoral areas, the March-May “long-rains” season was characterized by favourable precipitations that substantially regenerated rangeland resources, which entered the current dry season at well above-average levels (see ASI map for grassland). As a result, the seasonal deterioration of vegetation in recent months was slower than normal and current vegetation conditions are generally above average. The abundant pasture availability resulted in marked improvements in livestock body conditions. Due to the lasting impact of the above-average “long-rains”, trekking distances to watering points from grazing fields, although recording some increases during the dry season, as of August, were still between 20 and 50 percent below average in most pastoral areas.

In general, losses of pasture due to the current desert locust upsurge have been localized as damages were contained by sustained control measures and the regeneration of rangeland resources driven by abundant seasonal rains. However, losses were significant in some areas, mainly in Turkana, Marsabit, Samburu, West Pokot and Tana River counties, where swarms invaded about 1 million hectares of rangeland and cropland.

The October-December “short-rains” had a timely onset in northwestern areas, while northern and eastern areas have remained dry so far. The forecast below-average “short-rains” are expected to have a negative impact on rangeland conditions. In addition, in case of new arrivals of adult swarms from Ethiopia and Somalia, the availability of pasture may further decline, with increased competition between locusts and grazing animals for the limited resources.

Prices of maize declining in key producing areas ahead of “long-rains” harvest

Prices of maize declined by about 15 percent between June and September in Nakuru and Eldoret markets, located in western key producing areas, as traders released stocks ahead of the upcoming “long-rains” harvest. By contrast, prices slightly increased in the capital, Nairobi, over the same period, due to persisting supply chain disruptions linked to the COVID-19 pandemic and sustained demand. Overall, prices of maize in September were 10 to 15 percent lower than the very high levels of one year earlier.

In northern and eastern pastoral areas, prices of livestock increased by 10 to 20 percent in the last six months, as body condition improved following the abundant March-May

Kenya

Cereal Production

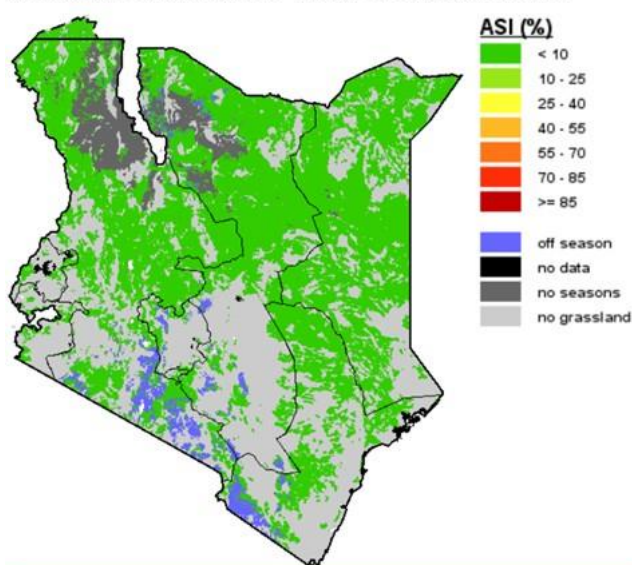
	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	3 550	3 400	3 700	8.8
Wheat	237	200	280	40.0
Sorghum	153	155	160	3.2
Others	305	354	331	-6.5
Total	4 245	4 109	4 471	8.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Kenya - Agricultural Stress Index (ASI) for grassland

from start of season 1 to dekad 2, September 2020



Source: FAO/GIEWS Earth Observation System.

“long-rains” and their lasting impacts during the dry season. In these areas, prices of maize remained stable or slightly increased following the seasonal patterns over the same period and, as of August, they were around their year-earlier levels.

With livestock prices increasing more than the cereal prices during the last six months, the terms of trade for pastoralists have increased by 5 to 25 percent between March and August 2020 in northern and eastern pastoral areas. For example, in Samburu County, the equivalent in maize of a medium-sized goat increased from 61 kg in March 2020 to 75 kg in August 2020, when it was about 50 percent higher than one year earlier.

Food security situation improved in rural areas, but deteriorated in urban areas

In the 23 counties classified as rural Arid and Semi-Arid Lands covering most of the country, about 850 600 people were estimated to be severely food insecure (IPC Phase 3: “Crisis” and Phase 4: “Emergency”) in the October-December 2020 period. This figure, which includes 685 000 people in IPC Phase 3 and 165 000 people in IPC Phase 4, is about 35 percent lower than the estimate of 1.3 million in the period February-March 2020 and more than 70 percent lower than the estimate of 3.1 million in late 2019. The substantial improvement of the food security situation is mainly the result of improved livestock productivity in pastoral and agro-pastoral areas due to favourable rains during the last two consecutive seasons.

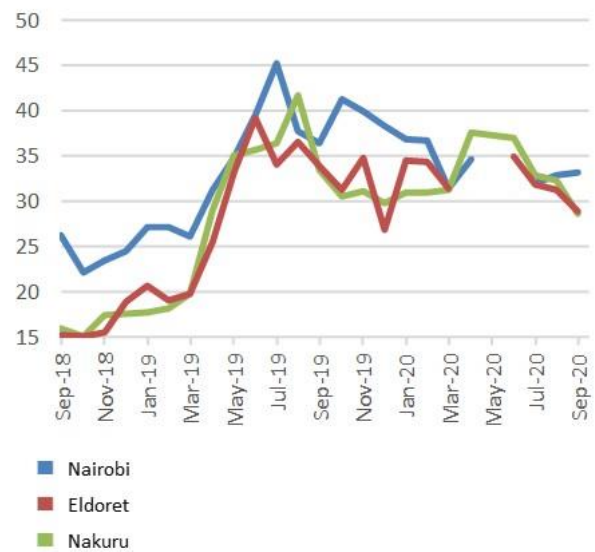
By contrast, the food security situation significantly deteriorated in the urban areas. Here, the restrictive measures introduced in March to curb the spread of the COVID-19 pandemic have severely affected the poor households, which mainly rely on daily wages earned through casual labour, petty trading, food vending, construction activities and domestic work. Due to a sharp decline in income, coupled with increasing food prices, about 1.7 million people are estimated to be food insecure in urban informal settlements. Despite the recent phasing out of some restrictive measures, including the travel ban to and from the Nairobi metropolitan area and Mombasa County, the food security situation of the urban poor is not expected to improve in the short term as the restoration of economic activity is likely to be slow.

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Kenya

Wholesale prices of maize

Kenyan Shilling per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kenya - Integrated Food Security Phase Classification (IPC)

Projection October-December 2020





GIEWS Country Brief Kenya

Reference Date: 12-May-2020

FOOD SECURITY SNAPSHOT

- Abundant rains in March and April benefited establishment and development of 2020 “long-rains” crops
- Severe desert locust outbreak affecting country, with crop losses expected mainly in southeastern marginal agriculture areas
- Reduced cereal output obtained in 2019 due to unfavourable weather conditions
- Above-average rangeland conditions benefiting livestock, despite localized pasture losses due to locusts
- Prices of maize declined in March, but remained at high levels due to tight supplies
- Number of severely food insecure people currently estimated at 980 000, markedly lower than in 2019, following two consecutive favourable rainy seasons benefiting livestock productivity

Abundant rains benefited establishment and development of 2020 “long-rains” crops

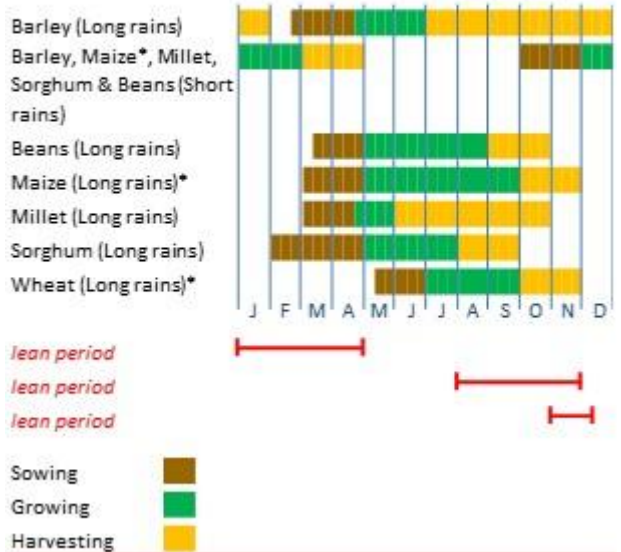
In the major uni-modal rainfall growing areas of Central, Rift Valley and Western provinces, planting of the 2020 “long-rains” crops, for harvest from October, is almost complete. Seasonal rains had a timely onset in mid-February and have been characterized so far by well above-average amounts. In high potential cropping areas of the southwestern “maize basket” (Bungoma, Lugari, Kericho, Nakuru, Nandi North, Nandi South, Trans Nzoia and Uasin Gishu counties), cumulative rainfall between February and late April were between 70 percent and more than 100 percent above the long-term average. In bi-modal rainfall southeastern and coastal areas, where crops will be harvested from July, after a timely onset in early March, rains in March and April were also well above the average. The abundant precipitation received across all growing areas benefited crop planting and germination, and overall vegetation conditions are currently good (see ASI map for cropland).

The heavy rains triggered floods and landslides in April, which resulted in the loss of lives, population displacements and localized damage to crops. The worst affected areas include southwestern West Pokot, Elgeyo Marakwet, Kisumu, Homa Bay, Kakamega, Siaya and Bomet counties, central Kirinyaga and Nairobi counties, and eastern Tana River, Garissa and Kilifi counties.

Kenya

Crop Calendar

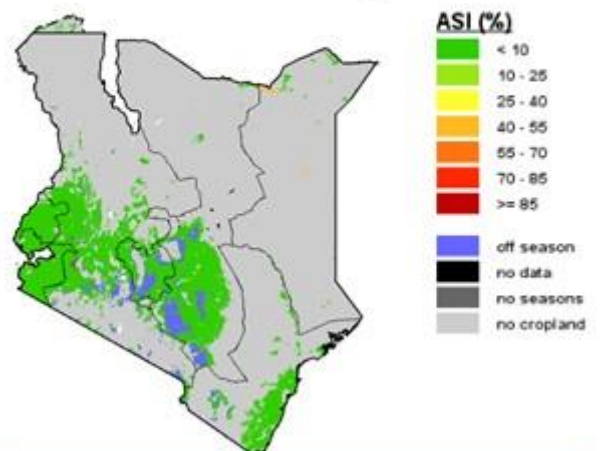
(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Kenya, cropland - Agricultural Stress Index (ASI)

from start of season 1 to Dekad 3, April 2020



Source: FAO/GIEWS Earth Observation System.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the remainder of the March-May rainy season is likely to be characterized by above-average precipitations in western areas and average to above-average rains over eastern areas, with a favourable impact on yields.

Since December 2019, the country is affected by a severe desert locust outbreak, the worst in 70 years. Locust swarms are currently present in 28 counties, mainly in central and northern agro-pastoral and pastoral areas, while infestation levels in southwestern key cropping areas are low. Large-scale control operations carried out by the Government with the support of FAO are mitigating the impact of locusts on crops. As a result, only localized production shortfalls are expected, mainly in southeastern marginal cropping areas of Embu (Mbeere), Tharaka Nithi, Meru North and Kitui counties.

Reduced 2019 cereal output due to unfavourable weather conditions

In bi-modal southeastern and coastal marginal agricultural areas, harvesting of the secondary 2018/19 “short-rains” season crops, accounting for about 20 percent of the annual cereal production, was concluded in mid-March. The October-December rainy season was characterized by exceptionally abundant rainfall amounts, among the highest of the past four decades, which boosted cereal yields, and the maize output is estimated at about 25 percent above the average of the previous five years. However, the torrential rains resulted in floods, which caused waterlogging and damage to standing crops, especially in Embu, Kilifi and Kwale counties, where the maize output was estimated at 10, 17 and 18 percent below average, respectively. Losses due to locusts have been minimal, as most crops had already been harvested when the insects reached these areas.

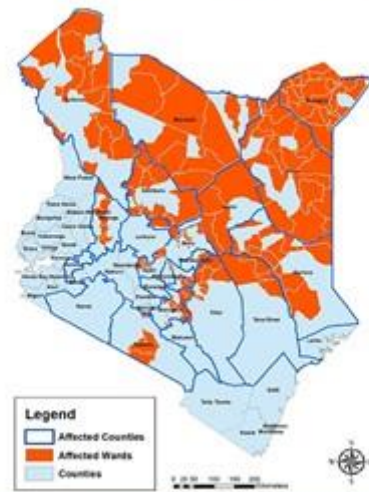
Earlier in the year, the main “long-rains” crops were affected by erratic rains, especially in southeastern areas, where severe early season dryness resulted in widespread germination failures and maize production is estimated at about 50-60 percent below average.

As a result, aggregate cereal production in 2019 is estimated at about 4 million tonnes, about 17 percent less than the previous year and 5 percent below the average of the previous five years.

Above-average rangeland conditions benefiting livestock despite localized pasture losses due to locusts

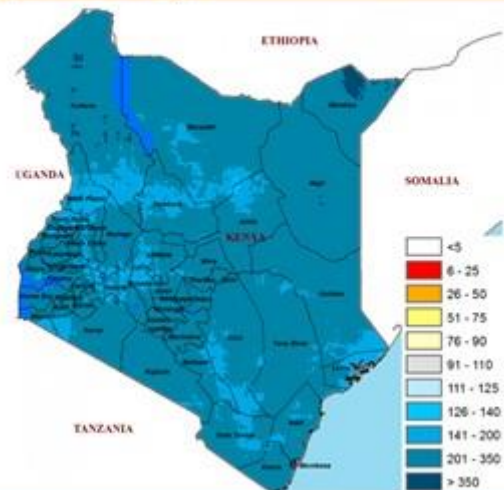
In northern and northeastern pastoral areas, abundant rains both during the October-December 2019 “short-rains” season and so far during the March-May 2020 “long-rains” season resulted in a significant improvement of vegetation conditions, which are currently well above average (see ASI map for grassland). According to the Government’s National Drought Management Authority, open water sources (pans, dams, rock catchments) were estimated to be at 50 to 80 percent of their capacity by the end of March and the well above-average rainfall amounts received in April are likely to have recharged them to a near-full capacity. Due to the lasting impact of the abundant October-December 2019 “short-rains”, trekking distances to watering points from grazing fields did not increase significantly during the January-February dry season and, in March 2020,

Kenya – areas affected by desert locusts, February 2020



Source: Kenya Food Security Steering Group

Kenya - cumulative October-December 2019 rainfall as a percentage of the 1981-2018 long-term average



Source: FEWS NET/USGS

Kenya

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018 percent
	000 tonnes			
Maize	3 573	4 000	3 400	-15.0
Wheat	243	360	200	-44.4
Sorghum	158	180	155	-13.9
Others	310	361	300	-16.9
Total	4 283	4 901	4 055	-17.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

they were between 35 and 75 percent below average in most pastoral areas. Livestock body conditions and milk production were reported to be above average as of end-March and have likely further improved as abundant rains continued in April.

So far, the losses of pasture due to the current desert locust outbreak have been localized, as the ongoing control measures and the regeneration of rangeland resources driven by abundant seasonal rains prevented widespread damages. However, significant losses are reported in some areas. For example, in Manderla South and West sub-counties of Manderla County and in North Horr and Laisamis sub-counties of Marsabit County, they are estimated at about 25-30 percent.

Maize prices at high levels despite declines in March

Prices of maize decreased by 10-15 percent in March in the markets located in key producing areas and in large urban centres including the capital, Nairobi, as newly harvested "short-rains" crops increased supplies. However, prices in March remained up to 70 percent higher than one year earlier due to tight domestic availabilities following the reduced 2019 cereal output.

In northern and eastern pastoral areas, prices of livestock increased in late 2019 with the abundant October-December "short-rains" and remained mostly stable during the January-February 2020 dry season. In Turkana, Marsabit and Garissa counties, for example, prices of goats increased by 15-35 percent between October 2019 and March 2020, when they were 30-60 percent higher than one year earlier. In these areas, prices of maize slightly declined in March with the "short-rains" harvest, when they were only slightly above their year-earlier levels.

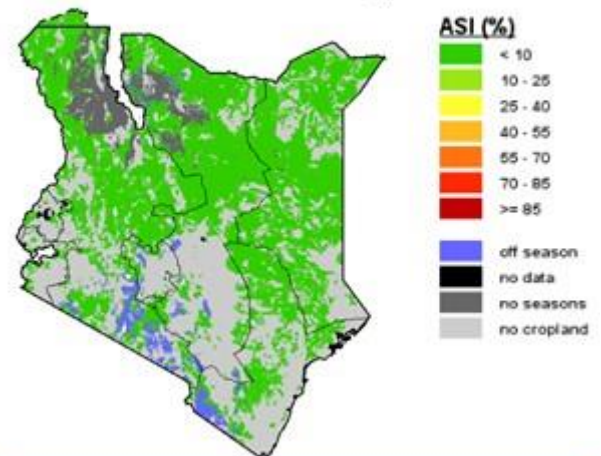
As a result of increasing livestock prices and declining cereal prices, the terms of trade for pastoralists markedly improved in northern and eastern areas over the last six months, increasing by 30-60 percent between October 2019 and March 2020, when they were well above their year-earlier levels. For example, in Marsabit County, the equivalent in maize of a medium-sized goat increased from 64 kg in October 2019 to 106 kg in March 2020, when it was more than 30 percent higher than one year earlier.

Improving food security situation in agro-pastoral and pastoral areas

According to the results of the latest IPC analysis, about 980 000 people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and Phase 4: "Emergency") in the period April-July 2020. This figure, which includes 872 000 people in IPC Phase 3 and 112 500 million people in IPC Phase 4, is about 25 percent lower than the estimate of 1.3 million in the period February-March 2020 and more than 60 percent lower than the estimate of 2.6 million in mid-2019. The substantial improvement of the food security situation is mainly the result of improved livestock productivity in pastoral and agro-pastoral areas due to favourable rains during the last two consecutive seasons. The restrictive measures introduced in March to curb the spread of the COVID-19 outbreak have affected households' income, especially in the informal sector in urban areas, but the implementation of social protection measures is expected to mitigate their negative impact.

Kenya, grassland - Agricultural Stress Index (ASI)

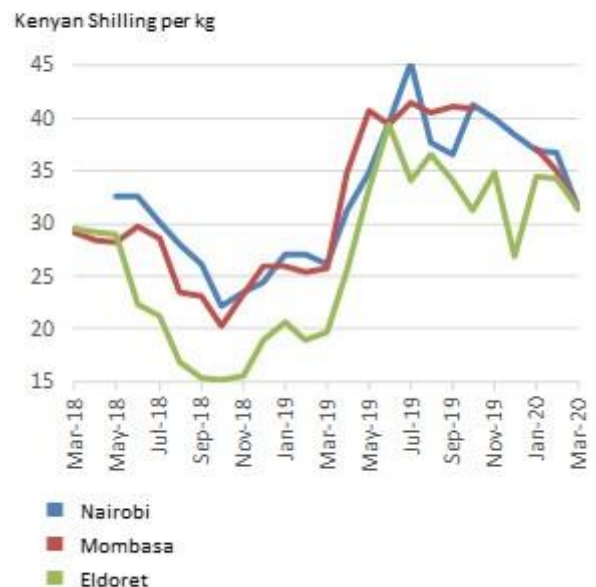
from start of season 1 to Dekad 3, April 2020



Source: FAO/GIEWS Earth Observation System.

Kenya

Wholesale prices of maize



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

The Government introduced, in March and April 2020, several precautionary measures in response to the COVID-19 pandemic, including:

- A nationwide curfew, from 19:00 to 05:00, except for essential service workers.
- The obligation for all citizens to stay indoors unless travel is essential.
- The prohibition of public gatherings.
- The suspension of all international flights, except for cargo planes.
- The closure of the land border with Uganda, except for cargo trucks.
- The prohibition of all movement in and out of the Nairobi metropolitan area and Mombasa, Kilifi, Kwale, and Mandera counties, except for providers of essential services.
- The restriction of vehicle movement in and out of Garissa County.
- The closure of all schools and universities.
- Work-at-home orders for public and private sector workers.

To mitigate the economic impact of these measures, especially on the vulnerable households, the Government is scaling up social protection and assistance programmes as well as implementing various fiscal measures, including:

- A suspension of income tax for low-wage workers earning a monthly income of up to KES 24 000 (USD 224).
- A reduction of the Value Added Tax (VAT) on all goods and services from 16 to 14 percent.
- The allocation of KES 10 billion to the elderly, orphans and other vulnerable groups through cash transfers to compensate income losses.

To bolster cereal availabilities during the pandemic, the Government allowed private traders to import about 4 million 90 kg bags of maize from outside the East African Community with an import duty reduced from 50 percent to 14 percent for white maize and 10 percent for yellow maize.

Projection April-July 2020



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GIEWS Country Brief Kenya

Reference Date: 07-June-2019

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2019 “long-rains” crops in southeastern and coastal areas due to dismal performance of seasonal rains
- Pasture and water shortages in pastoral areas affecting livestock conditions
- Prices of maize surging in recent months to high levels, driven by concerns over performance of current crops
- Number of severely food insecure people sharply increased in 2019 and caseload expected to reach 2 million in July

Unfavourable prospects for 2019 “long-rains” crops in southeastern and coastal areas

Planting of “long-rains” main season crops normally starts in March in major growing areas of Central, Rift Valley and Western provinces. Severe early season dryness prevailed over most cropping areas, delaying planting operations and affecting crop germination and vegetation conditions. In high potential cropping areas of the southwestern “maize basket” (Bungoma, Lugari, Kericho, Nakuru, Nandi North, Nandi South, Trans Nzoia and Uasin Gishu counties), cumulative rainfall between February and mid-April was up to 80 percent below average. Despite improved rains between mid-April and late May, according to FAO’s Agricultural Stress Index System (ASI), severe drought was still affecting between 20 and 45 percent of the cropland in late May in most areas of the “maize basket”. Significant rainfall deficits were also recorded in several central medium potential cropping areas and in most southeastern and coastal marginal agriculture livelihood zones. Here, drought conditions prevailed in March and April and, despite localized heavy rains in May, cumulative seasonal precipitations were 30-65 percent below average. According to ASI, severe drought was affecting up to 45 percent of the cropland in late May.

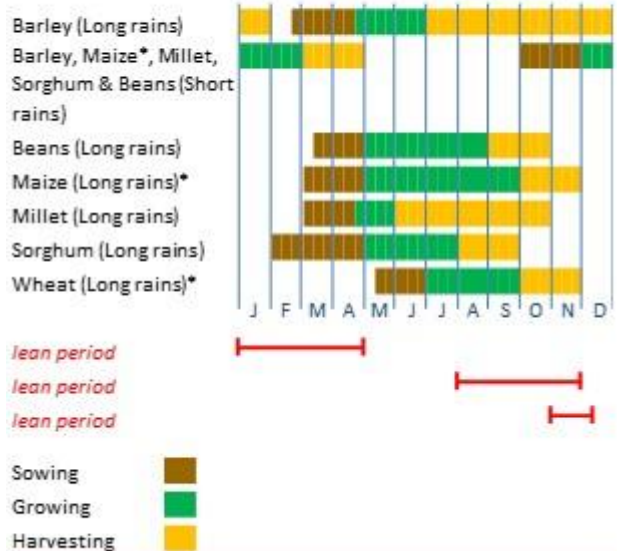
Fall Armyworm outbreaks have been reported in several cropping areas, including Uasin Gishu, Trans Nzoia, Marakwet, West Pokot, Laikipia, Narok, Busia and Kisumu counties. Infestation levels were fostered by the prevailing dry conditions in March and April, but have recently declined with the increased precipitations received in May.

The latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast points to above-average rains

Kenya

Crop Calendar

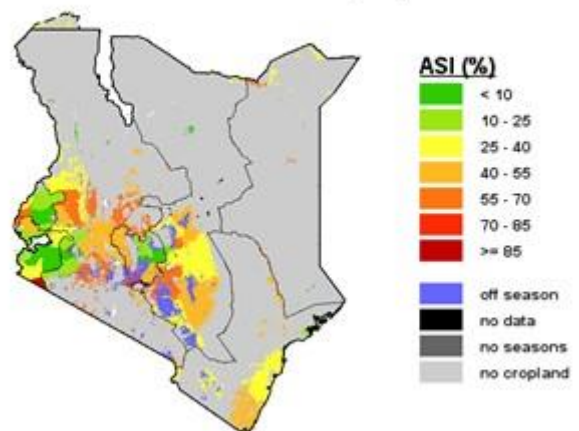
(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Kenya - Agricultural Stress Index (ASI)

From start of season 1 to Dekad 2, May 2019



Source: FAO/GIEWS Earth Observation System.

between June and August in major southwestern growing areas. If this forecast materializes, a substantial recovery of water-stressed crops is still possible as the growing season continues up to October, when the harvest normally starts. By contrast, in southeastern and coastal marginal agriculture areas, where seasonal rains usually subside in early June, the damage to crops is likely to be irreversible and crop production prospects remain unfavourable. The harvest, usually starting in July, will be delayed by at least one month and production is forecast to be about 50 percent below average. In these areas, it would be the second consecutive poor harvest, as the 2018/19 “short-rains” output, gathered last February, was more than 60 percent below average due to inadequate precipitations.

Pasture and water shortages in pastoral areas affecting livestock conditions

Northern and northeastern pastoral areas as well as central and southern agro-pastoral areas have been severely affected by the cumulative impact of below average 2018 October-December “short-rains”, followed by a harsh January-March 2019 dry season and by an extremely poor performance of the March-May “long-rains”. According to the Government’s National Drought Management Authority, as of April, out of the 23 counties located in the Arid and Semiarid Lands, covering about 80 percent of the country’s landmass, 11 were declared to be in “drought alert phase” and ten in “drought alarm phase”. The counties in “drought alarm phase” are Baringo and West Pokot in the west, Turkana, Marsabit and Samburu in the northwest and Mandera, Wajir, Garissa and Tana River in the northeast. In these areas, cumulative rains between March and mid-May were up to 70 percent below average, with prolonged dry periods interrupted only by scattered rains in late March and late April. The severe dryness resulted in a deterioration of rangeland conditions to extremely poor levels (see Vegetation Health Index map). Due to significant forage and water deficits, livestock trekking distances to watering points from grazing fields have increased to very high levels and, in several pastoral and agro-pastoral areas, they are between 50 and 90 percent longer than average. Livestock body conditions are generally below average and some animal deaths have been reported in Turkana and Samburu counties. Milk production has declined to low levels and, in northern pastoral areas, it is currently about 50 percent below average. Heavy showers received in May had some localized positive impacts on rangeland conditions, but these improvements are likely to be short-lived as seasonal rains usually subside in early June.

Maize prices surged to high levels in recent months

Prices of cereals remained stable at low levels in the first quarter of 2019, mainly due to the large carryover stocks from the bumper 2018 “long-rains” harvest. Subsequently, prices surged by 35-75 percent between March and May in the markets located in main urban centres and in western key growing areas, driven by concerns over the impact of the severe dry conditions on current crops. As a result, prices in May were up to 50 percent higher than their year-earlier levels. In West Pokot, Laikipia, Tharaka Nithi and Kwale counties, located in agro-pastoral and marginal agriculture livelihood zones, prices of maize increased by 30-70 percent in April, when they were up to 40 percent higher than one year earlier.

Prices of livestock, which declined in January and February following seasonal patterns, continued to decrease in March and April as body conditions deteriorated due to the extremely poor

Kenya

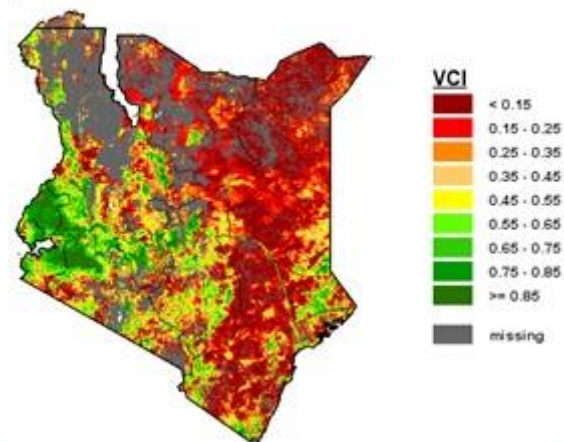
Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	3 491	3 186	4 000	25.5
Wheat	261	165	360	118.2
Sorghum	156	125	170	36.0
Others	303	345	361	4.6
Total	4 211	3 821	4 891	28.0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Kenya - Vegetation Condition Index (VCI)

May 2019

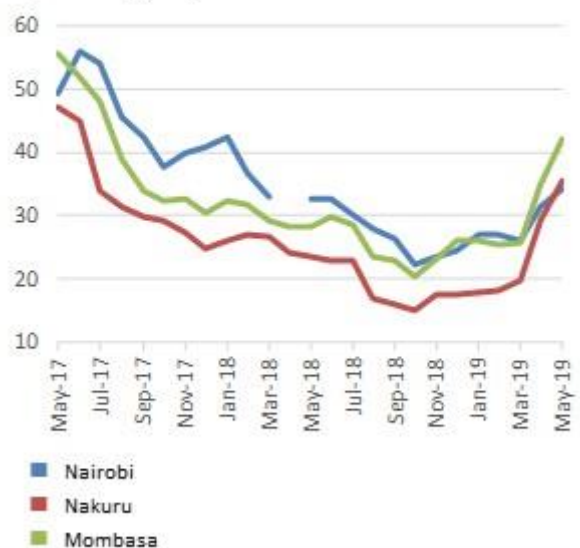


Source: FAO/GIEWS Earth Observation System.

Kenya

Wholesale prices of maize

Kenyan Shilling per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

rainy season. In Marsabit County, for example, prices of cattle, sheep and goats declined between January and April by 20-30 percent. Due to declining livestock prices and increasing cereal prices, terms of trade for pastoralists sharply deteriorated in recent months. Between January and April 2019, the equivalent in maize of a medium-sized goat in Marsabit County declined by 40 percent, from 106 kg to 64 kg.

Deteriorating food security situation in pastoral and marginal agriculture areas

According to the Government's National Drought Management Authority, about 1.6 million individuals were estimated to face IPC Phase 3: "Crisis" levels of food insecurity in May, twice the caseload in early 2019. The number of severely food insecure people is expected to further increase to about 2 million in July. The areas most affected by food insecurity are Turkana, Marsabit, Wajir, Garissa, Tana River and Baringo counties.

The sharp deterioration of the food security situation is being driven by the cumulative impact of two consecutive poor rainy seasons on livelihoods in pastoral, agro-pastoral and marginal agricultural areas. In pastoral areas, the decline in terms of trade and shortages of livestock products (mainly milk), are severely affecting food access and availability. In marginal agriculture areas, poor cropping conditions have caused a significant decline in farm labour opportunities and household income. As a result, vulnerable households are atypically and increasingly resorting to negative consumption-based coping strategies, including the reduction of food quantity per meal and the consumption of less preferred and/or less expensive foods.

The country hosts about 473 000 refugees and asylum seekers as of late March 2019, with about 258 000 and 115 000 of them originating from Somalia and South Sudan, respectively.

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Kenya – Integrated Food Security Phase Classification

Projection May-July 2019





GIEWS Country Brief Kenya

Reference Date: 08-May-2018

FOOD SECURITY SNAPSHOT

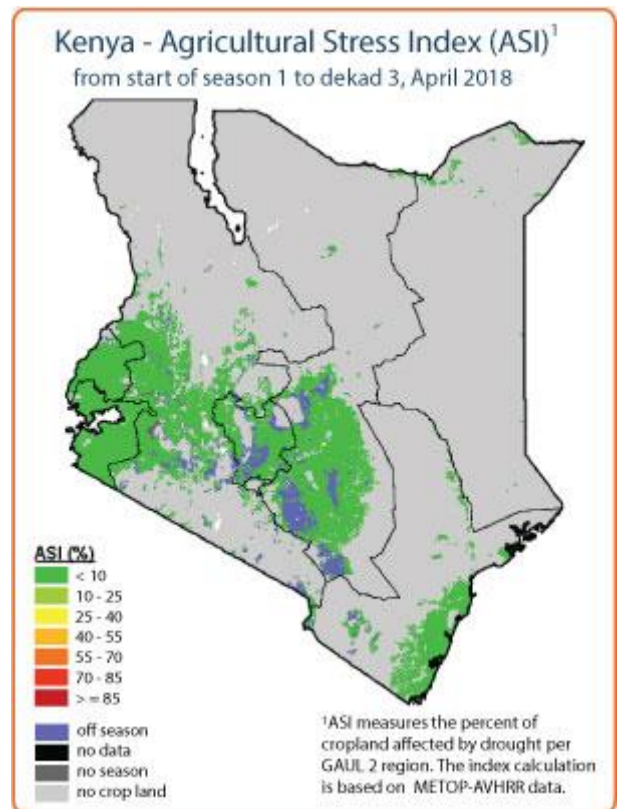
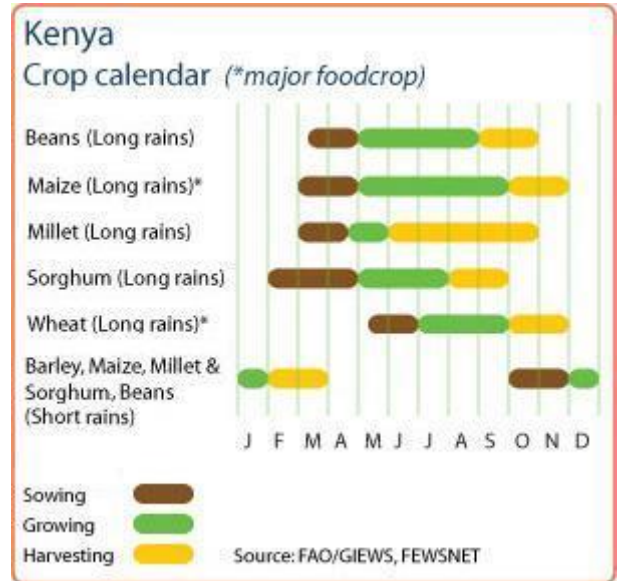
- Abundant rains in March and April benefited establishment and development of 2018 “long-rains” crops and improved pasture conditions
- Widespread floods resulting in displacement of about 244 000 individuals
- Reduced cereal output obtained in 2017 due to unfavourable weather conditions
- Prices of maize declining and generally at low levels, mostly due to sustained imports
- As of January 2018, 2.35 million people severely food insecure, 30 percent less than in October 2017
- Food security situation improving in 2018

Abundant rains benefited establishment and development of 2018 “long-rains” crops

Planting of “long-rains” main season crops started in March with the timely onset of seasonal rains. So far, rains have been characterized by exceptionally high precipitation amounts across the country. In major southwestern growing areas of Central, Rift Valley and Western provinces (Bungoma, Kericho, Nakuru, Nandi, Trans Nzoia and Uasin Gishu counties), cumulative rainfall in March and April was between two and three times the long-term average. Heavy precipitations had a positive impact on crop establishment and development and vegetation conditions are currently good across all cropping areas (see ASI map). However, torrential rains triggered widespread floods, especially in Tana River, Wajir, Mandera and Garissa counties, which resulted in damage to houses and infrastructures, displacement of about 244 000 individuals, damage of 8 800 hectares of farmland and death of about 19 000 heads of livestock.

Although Fall Armyworm infestations are likely to constrain yields in some areas, it is expected that crop losses will be lower than in 2017 due to the improved capacity of pest management interventions, including pre-positioning of pesticides.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the remainder of the March-May rainy season is likely to be characterized by average to above-average precipitations, except in northeastern areas, where rains are forecast at below-normal to normal levels.



Reduced 2017 cereal output due to unfavourable weather conditions

In bi-modal southeastern and coastal marginal agricultural areas, harvesting of the 2017/18 “short-rains” season crops, where it accounts up to 60 percent of the total annual output, was concluded in March. Maize production is estimated about 15-20 percent below the average of the previous five years due to unfavourable weather conditions during the October-December rainy season.

The 2017 main “long-rains” rainy season was characterized by a late onset and a prolonged dry spell in June, which caused moisture stress and wilting of crops during the critical development stages. Although improved rainfall between July and September partly offset the moisture deficits, some damage to the maize crop was irreversible. In addition, Fall Armyworm infestations affecting the maize crops resulted in the loss of about 100 000 tonnes and crop production was estimated at below-average levels.

As a result, aggregate cereal production in 2017 is estimated by FAO at a low 3.6 million tonnes, 8 percent less than the previous year and 18 percent below the average of the previous five years. Accordingly, cereal import requirements for the 2017/18 marketing year (July/June) are set at 3.6 million tonnes, about 8 percent more than the previous year and 35 percent higher than the last five-year average.

Heavy precipitations improving livestock conditions and productivity in pastoral areas

In most pastoral and agro-pastoral areas, where drought conditions prevailed since late 2016, abundant rains in March and April offset accumulated moisture deficits and resulted in a substantial regeneration of rangeland resources. In northeastern pastoral areas of Marsabit, Mandera, Isiolo, Wajir and Garissa counties, which experienced the most severe rainfall deficits during the past three rainy seasons, estimated cumulative rainfall in March and April was between two and three times the long-term average. Heavy rains resulted in a significant improvement of vegetation conditions, which are currently well above average in most areas (see Vegetation Health Index map). Rainfall surpluses have also resulted in the complete recharge of most water sources (pans, shallow wells, boreholes) and livestock trekking distances to watering points from grazing fields have decreased to historically low levels. In Garissa, Isiolo and Tana River counties, they have declined by 40-80 percent between February and March, when they were up to 80 percent shorter than average. Livestock body conditions and milk production, which declined to very low levels due to the prolonged drought, substantially improved since the start of the rainy season and, although in March they were still slightly below-average, they are expected to further improve as abundant rains continued in April. The Livestock Early Warning System predicts the onset of dry conditions from July. Most of the forage cover will wither as they are mainly annuals that are sensitive to fluctuations in precipitation.

Maize prices declining to low levels

After having reached record highs in June 2017, prices of maize declined in main markets by 25-45 percent between June and December 2017 as the “long-rains” harvest and sustained

Kenya

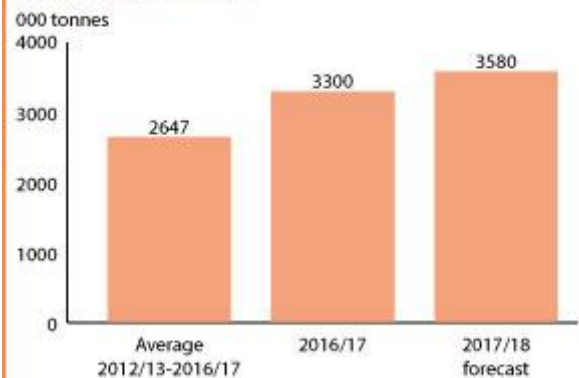
Cereal production

	2012-2016	2016	2017 estimate	change
	average			2017/2016
000 tonnes				
percent				
Maize	3 604	3 339	3 000	-10
Wheat	316	222	225	1
Sorghum	164	117	125	7
Others	305	232	249	7
Total	4 389	3 910	3 599	-8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kenya

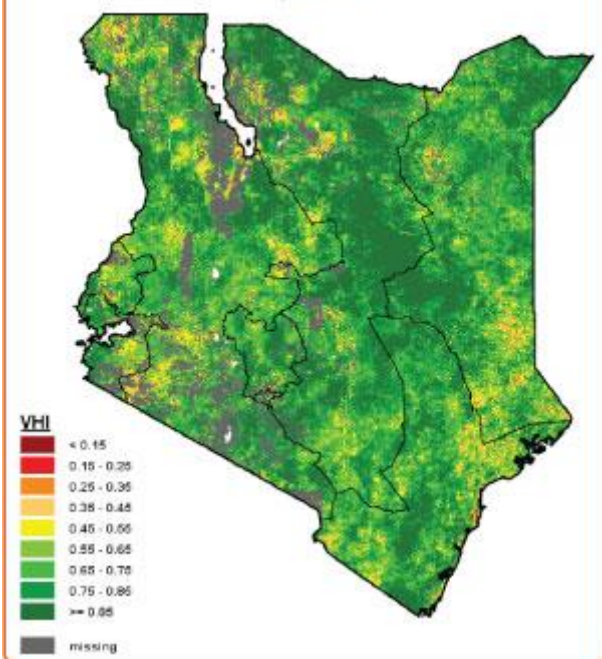
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kenya - Vegetation Health Index (VHI)

April 2018



imports increased supplies. The introduction of subsidies for maize grain imports and for the sale of maize flour products exerted a further downward pressure on prices. Subsequently, prices levelled off in January and February 2018, declining again by 10-15 percent between February and April as newly-harvested “short-rains” crops entered the markets. Prices of maize in April were 30-50 percent below their levels of one year before, when drought conditions seriously affected crop production. Prices of livestock reached historically low levels in mid-2017, after the failure of the 2016 “short-rains”, a harsh dry season and a delayed onset of the 2017 “long-rains”, as animal body conditions dramatically deteriorated and pastoralists were forced to reduce their herd sizes. Subsequently, prices increased in the second semester of 2017 and in early 2018 as animal body conditions improved and market supplies declined due to animal losses in previous months and herders were engaged in repopulating their herds and fattening their animals. In Marsabit, Garissa and Wajir counties, prices of goats in March were between 20 and 40 percent higher than a year earlier. As a result of increasing livestock prices and stable or declining cereal prices, the terms of trade for pastoralists improved over the last 12 months. For example, the equivalent in maize of a medium-sized goat in Garissa county increased by more than 30 percent on a yearly basis, from about 45 kg in March 2017 to about 60 kg in March 2018.

Improving food security situation in pastoral and agro-pastoral areas

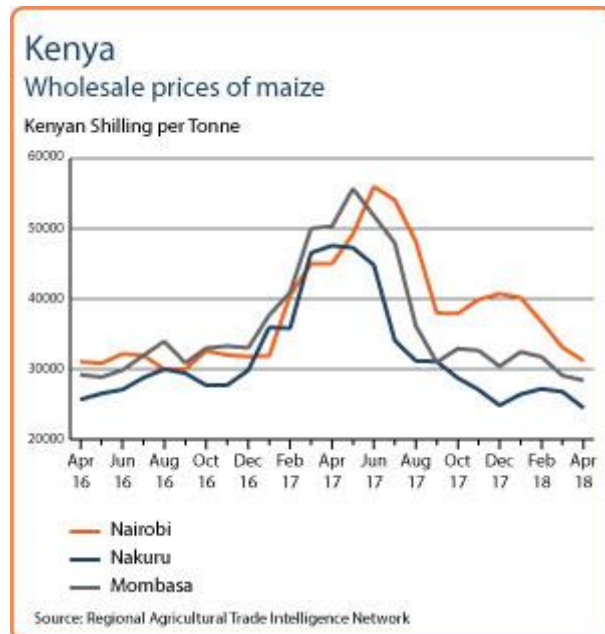
According to the latest national food security assessment, the overall number of people in need of humanitarian assistance was estimated at 2.35 million in January 2018, 30 percent down from the estimate of 3.4 million in October 2017, but still 7 percent higher than the caseload of 2.2 million estimated 12 months earlier.

Despite the significant improvements recorded in most livelihood zones, in January 2018 the IPC Phase 3: “Crisis” food insecurity levels still persisted in several pastoral and agro-pastoral areas, including parts of Turkana, Marsabit, Mandera, Wajir, Tana River, Kajado, Isiolo and Garissa counties. In these areas, the food security situation has been affected by the cumulative impact on food availability and access of three consecutive poor rainy seasons, which caused livestock emaciation and animal deaths, and severe shortages of livestock products (mainly milk).

The food security situation has recently improved with the abundant “long-rains” received in March and April, which resulted in forage regeneration, improvement of livestock body conditions and terms of trade, and increase of milk production. In agro-pastoral areas, the increased labour opportunities associated to agricultural operations related to the starting 2018 “long-rains” season are facilitating market food purchases.

However, in the areas most affected by the recent floods, the crop and livestock losses have resulted in the deterioration of the food security situation of the displaced population, and food shortages are reported.

The country hosts a large number of refugees and asylum seekers, with about 273 000 refugees from Somalia as of late March 2018. About 50 percent of them reside in the Dadaab refugee camp in northeastern Garissa county, where access to the basic necessities including food, shelter, water and sanitation



is often precarious due to the high concentration of people. The number of refugees from South Sudan is also significant, with about 113 000 individuals having crossed over to Kenya since mid-December 2013. Most of them are currently residing in the Kakuma refugee camp in northwestern Turkana county.

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GIEWS Country Brief Kenya

Reference Date: 25-April-2017

FOOD SECURITY SNAPSHOT

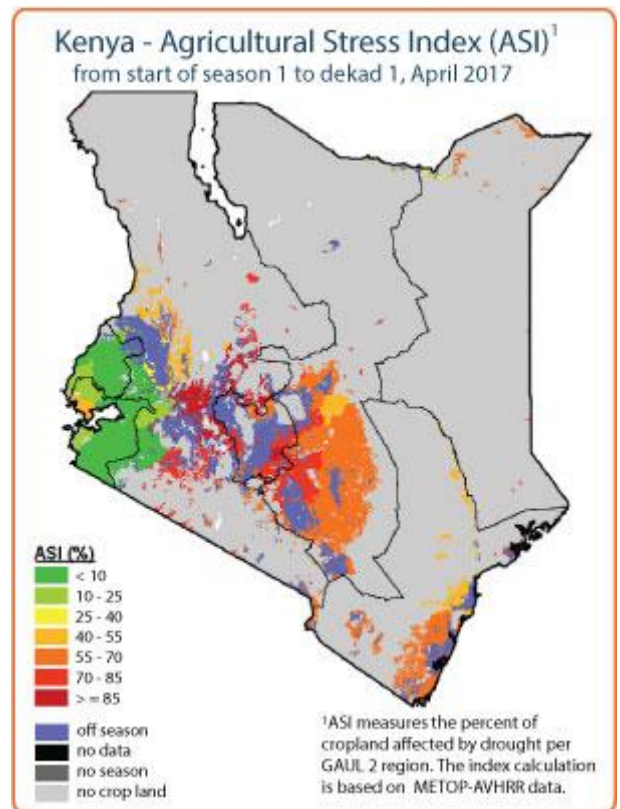
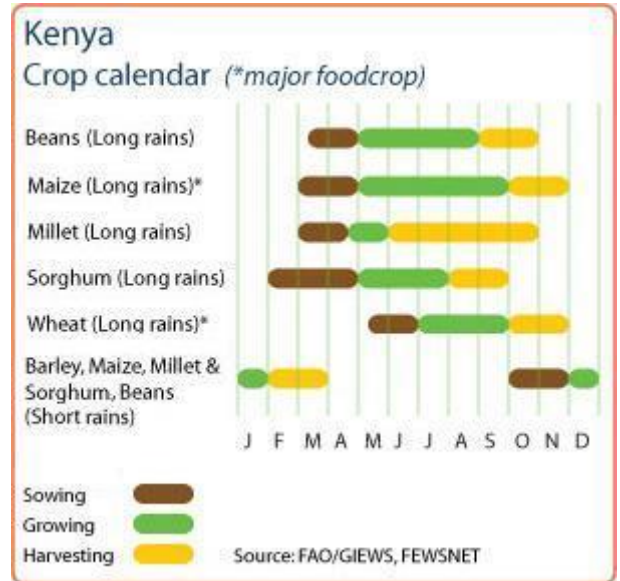
- Uncertain prospects for 2017 “long-rains” crops due to early season dryness and fall armyworm infestations in key-producing areas
- Reduced 2016 cereal output due to unfavourable weather conditions, particularly during the October-December “short-rains” season
- Prolonged and severe drought affecting livestock conditions and productivity in most agro-pastoral and pastoral areas
- Prices of maize surging to near-record to record levels in recent months
- Sharply deteriorating food security situation in most agro-pastoral and pastoral areas

Early-season dryness affecting planting and germination of 2017 “long-rains” crops

Planting of “long-rains” main season crops normally starts in March in major growing areas of Central, Rift Valley and Western provinces. Early season dryness prevailed over most cropping areas, thus delaying planting operations and affecting conditions of early, dry-planted crops (see ASI map). In high potential cropping areas of the southwestern “maize basket”, accumulated rainfall between February and the first dekad of April was 25-50 percent below-average in Trans Nzoia, Uasin Gishu and Nakuru counties. In central medium potential cropping areas and in southeastern agro-pastoral and marginal agricultural areas, rainfall deficits were more severe. For instance, in central Baringo, Laikipia, Nyandaragua, Muranga, Meru and Kiambu counties, seasonal rainfall was 55-85 percent below average, while in southeastern Kitui and in coastal Lamu counties some light showers were received only in the first dekad of April.

In westernmost Bungoma, Kericho and Nandi counties, accumulated rainfall between February and the first dekad of April was normal to above-normal.

Fall armyworm infestations affecting maize crops, first reported in western Kenya by farmers in March 2017, have been confirmed by the Kenya Plant Health Inspectorate Service and Kenya Agricultural and Livestock Research Organization. The areas initially infested were Busia, Trans Nzoia, Bungoma, Uasin Gishu and Nandi counties in the southwest. Subsequently, the pest has spread to Kericho, Bomet, Narok, Nakuru and Baringo counties in



the centre and in the south. In response, the Government has formed a platform to coordinate the development of intervention strategies. However, budget constrains are severely limiting the implementation of appropriate control measures.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the March-May rains are likely to be below average, except in southwestern areas, where they are forecast at normal to above normal levels.

Reduced 2016 cereal output due to unfavourable weather conditions

In southeastern and coastal bi-modal rainfall areas, harvesting of the 2016/17 “short-rains” season crops, where it accounts for about 70 percent of the total annual production, is normally concluded in March. However, the harvest was delayed by about one month and its output was sharply reduced due the failure of the October-December rainy season. In southeastern cropping areas (Kitui, Makueni, Tharaka Nithi, North Meru and Embu counties), the cumulative rainfall from October to December was 40-55 percent down from the long-term average; in coastal areas (Kwale, Kilifi, Lamu and Taita Taveta counties), the performance of the rainy season was even poorer, as seasonal rainfall was 55-90 percent below the long-term average. As a result, the 2016/17 “short-rains” maize production was 70 percent below the average of the previous five years, with a near-total failure reported in coastal areas.

Earlier in the year, the main “long-rains” rainy season, despite average to above-average rainfall amounts, had a late onset and an erratic distribution, and crop production was estimated at below-average levels.

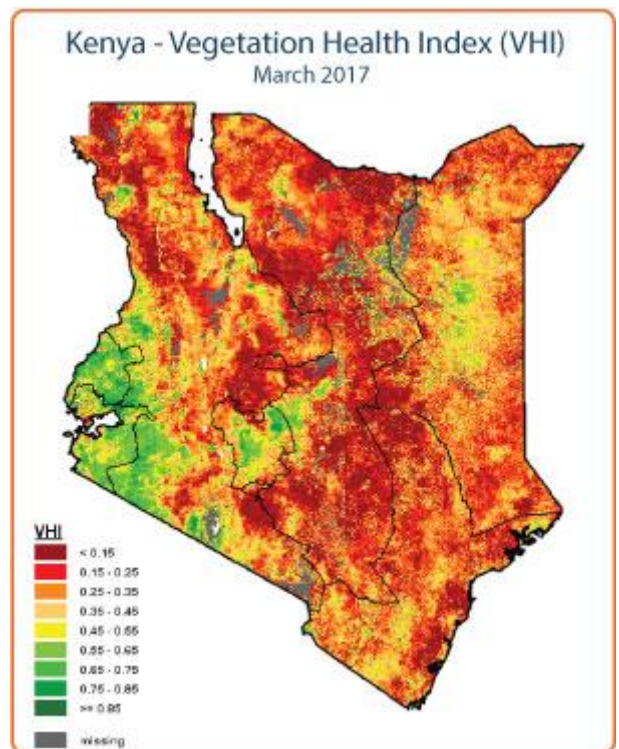
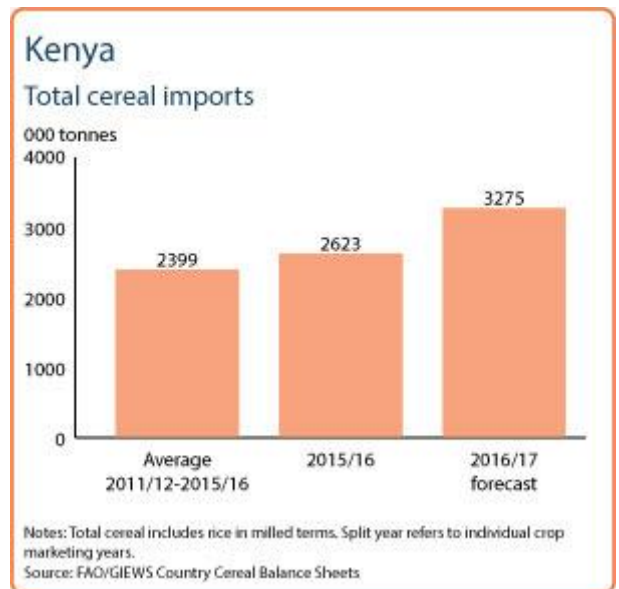
As a result, aggregate cereal production in 2016 is estimated by FAO at a low 3.7 million tonnes, 12 percent down from the previous year and 15 percent below the average of the previous five years. Accordingly, cereal import requirements for the 2016/17 marketing year (July/June) are set at 3.3 million tonnes, about 25 percent more than previous year and 37 percent higher than the last five-year average.

Prolonged drought severely affecting livestock conditions and productivity in pastoral areas

Prolonged drought conditions are severely affecting pasture, browse and water availability in most pastoral and agro-pastoral areas. A below-average performance of the 2016 March-May “long-rains” was followed by a harsh and longer-than-normal June-October dry season. Subsequently, the failure of the “short-rains” rainy season, with cumulative seasonal rainfall being up to 80 percent below-average in northern areas, allowed only a minimal regeneration of forage and water resources. Despite some off-season precipitations received in February, higher-than-normal land surface temperatures and a late onset of the 2017 “long-rains” have caused a further deterioration of rangeland conditions to extremely poor levels (see Vegetation Health Index map). Several areas are experiencing exceptionally severe forage and water deficits, including parts of Marsabit, Turkana, West Pokot and Baringo counties, and most of Tana River, Mandera and Garissa counties. In Marsabit and Baringo counties, about 90 percent of the water points are currently reported to be dry. Due to the severe water and forage shortages, livestock trekking distances to watering points from

Kenya				
Cereal production				
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	3 507	3 300	2 900	-12
Wheat	382	420	380	-10
Sorghum	169	170	140	-18
Others	323	359	309	-14
Total	4 381	4 249	3 729	-12

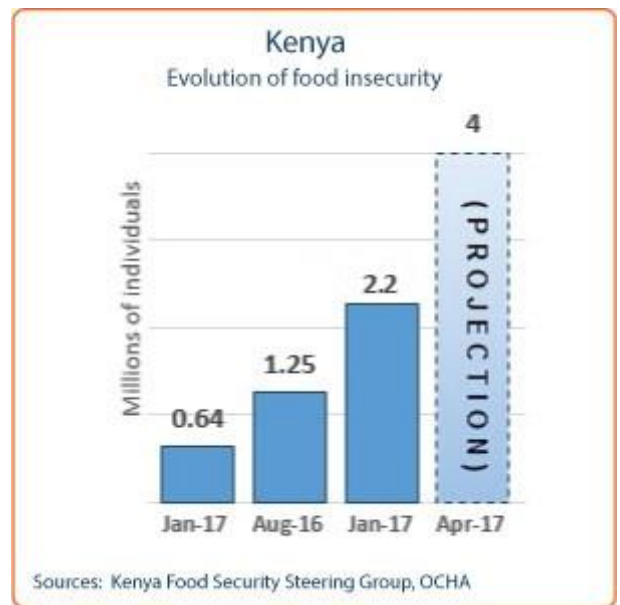
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



grazing fields have substantially increased. In Garissa, Marsabit, Isiolo and Tana River counties, they are 55-70 percent longer than average. Livestock body conditions are generally very poor, with livestock mortality rates are currently estimated at up to 15 percent compared to a normal rate of 2-3 percent. Milk production is at record low levels, in particular in Lamu, Tana River, Turkana, Mandera, Marsabit and Isiolo counties, where in February it was estimated at just 2-8 percent of the long-term average.

Maize prices surging to near-record to record levels in recent months

Wholesale maize prices, were mostly stable in the second semester of 2016, surged by 20-40 percent between January and March 2017 in all monitored markets due to the upward pressure exerted by the drought-driven failure of the secondary 2016 “short-rains” harvest and by concerns over the performance of the 2017 main “long-rains” harvest, due to a delayed onset of seasonal rains. Prices of maize in March were up to 66 percent higher than 12 months earlier and at near-record to record levels, on account of a reduced 2016 cereal production coupled with reduced and highly priced imports from neighbouring Uganda and the United Republic of Tanzania, where the supply situation is tight. In drought-affected southeastern marginal agricultural counties, mainly dependent on the “short-rains” season, sharper year-on-year price increases were recorded. In Tharaka Nithi, Meru, Kitui, Makueni and Embu counties, maize prices in February were up to more than twice their year-earlier levels. Prices of beans were also at high levels, up to 80 percent above their values in March last year. Prices of livestock declined in recent months to very low levels due to the severe drought in pastoral and agro-pastoral areas, as animal body conditions have substantially deteriorated and pastoralists were forced to reduce their herd sizes. In Marsabit, Garissa and Tana River counties, prices of goats in February were between 25 and 55 percent lower than a year earlier. As a result of declining livestock prices and increasing cereal prices, the terms of trade for pastoralists sharply deteriorated over the last 12 months. The equivalent in maize of a medium-sized goat in Garissa county declined by 60 percent on a yearly basis, from 71 kg in February 2016 to just 28 kg in February 2017.



Sharply deteriorating food security situation in most pastoral and agro-pastoral areas

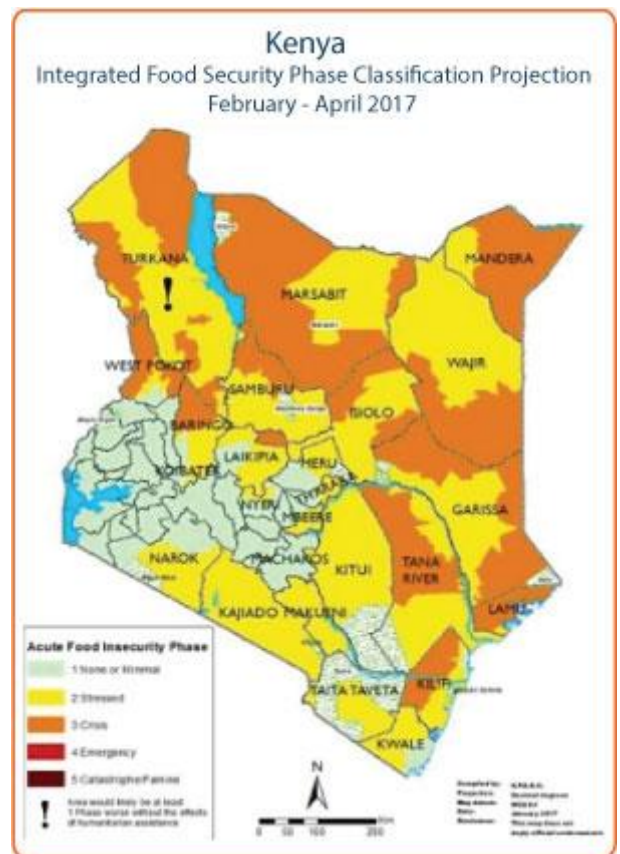
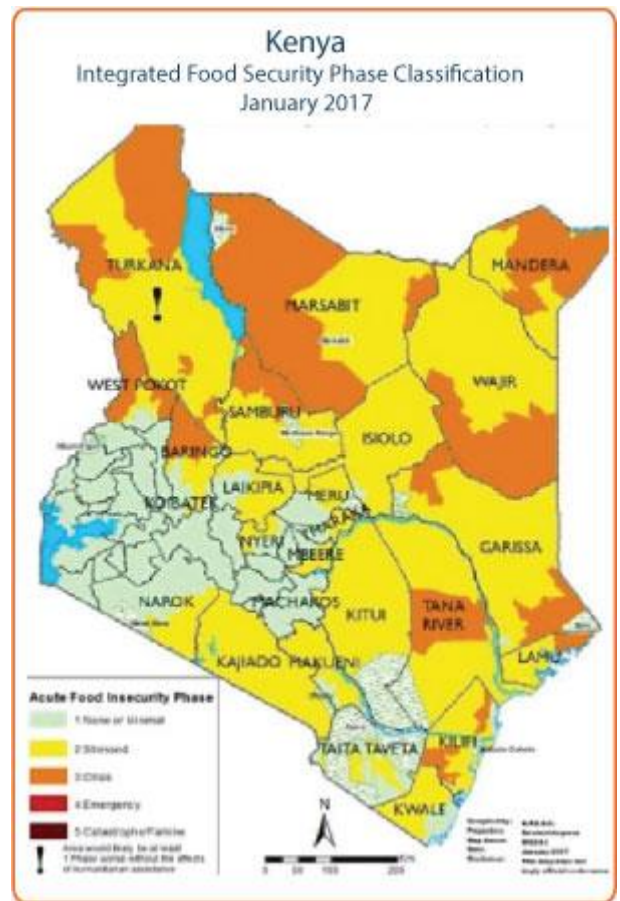
According to the latest national food security assessment, the overall number of people in need of humanitarian assistance was estimated at 2.2 million in January 2017, 76 percent more than the estimate of 1.25 million in August 2016 and almost four times the caseload of 640 000 estimated 12 months earlier. The areas most affected by food insecurity are parts of the pastoral areas of Turkana, Marsabit, West Pokot, Baringo, Wajir, Mandera, Tana River and Garissa counties, and parts of the coastal marginal agricultural areas of Kilifi and Lamu counties, where households are facing IPC Phase 3: “Crisis” food insecurity levels (IPC map January 2017). The sharp deterioration of the food security situation is due to the impact of the prolonged drought on livelihoods in most pastoral, agro-pastoral and marginal agricultural areas. In pastoral areas, the decline in terms of trade due to decreasing livestock prices and increasing cereal prices, coupled with severe shortages of livestock products (mainly milk) severely affected food availability and access. Pastoralist households are atypically and increasingly resorting to

consumption-based coping strategies, including skipping of meals, reduction of food quantity per meal, consumption of less preferred and/or less expensive foods, borrowing food or relying on help from neighbours, friends and relatives and restricting consumption by adult to feed children. In coastal marginal agriculture areas, households have experienced poor cropping conditions for the third consecutive season, which have caused a significant decline in farm labour opportunities and household income. The decrease in purchasing power, coupled with higher food prices and an increase in market reliance due to consecutive own production shortfalls has led to a sharp deterioration of the food security situation.

The food security situation is likely to further deteriorate in the coming months, and the Government of Kenya has projected that the number of food insecure people could rise to 4 million already by April 2017. In pastoral areas, the past dry season and the delayed onset of the 2017 “long-rains” have further exacerbated the already serious shortage of forage and water for livestock, and a much longer-than-normal period would be necessary for a full recovery of animals. In marginal agricultural areas, a faster-than-usual stock depletion and an early onset of the lean season will further increase pressure on markets, where supplies are already low and prices are at high levels. In addition, the delayed “long-rains” and the lack of resources will constrain agricultural activities, thus limiting casual labour and income opportunities for poor households. As a result, the areas with households facing IPC Phase 3: “Crisis” food insecurity levels will expand by April 2017 in all the counties already affected (IPC map February-April 2017).

The country hosts a large number of refugees and asylum seekers, with about 308 000 refugees from the Federal Republic of Somalia as of late March 2017. About 50 percent of them reside in the Dadaab refugee camp in northeastern Garissa county where access to the basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people and the uncertainty over the deadline for the camp's closure is affecting assistance operations. As of late March, about 86 000 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013, with most of them currently residing in the northwestern area of Kakuma in Turkana county.

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GIEWS Country Brief Kenya

Reference Date: 17-November-2016

FOOD SECURITY SNAPSHOT

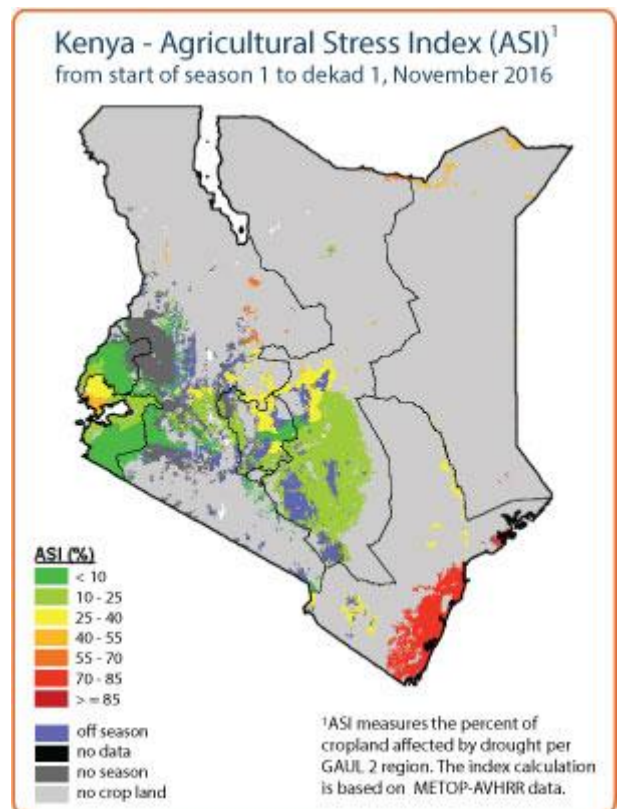
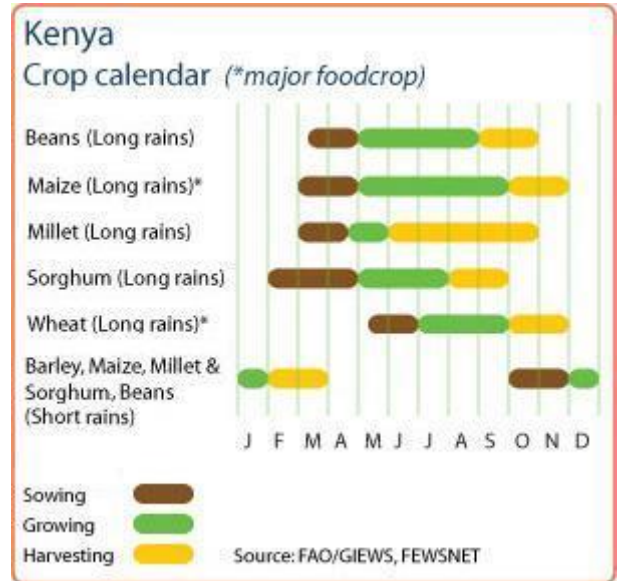
- “Short-rains” crop production severely affected by dry weather conditions
- “Long-rains” crop production expected at average levels
- Dry weather conditions affecting pasture availability in most eastern and northeastern areas
- Prices of maize firm or on the rise in most markets
- Severe food insecurity in most agro-pastoral and pastoral areas

Unfavourable prospects for 2016/17 “short-rains” season crops

In southeastern and coastal bi-modal rainfall areas, planting of the 2016/17 “short-rains” season crops, which accounts for 70 percent of the total annual production and normally starts in mid-October, has been significantly delayed by severe dry weather conditions. As of the first dekad of November, very minimal rains have been received and most farmers have been unable to plant so far. Some farmers decided to early dry plant and most germinating crops wilted. As rains continue to be unfavourable, planted areas are very likely to be well below-average. The FAO Agricultural Stress Index (ASI) indicates a significant risk of drought conditions developing, especially in cropping areas of the coastal counties of Kwale, Kilifi and Lamu (see red area in ASI map). According to the Greater Horn of Africa Climate Outlook Forum (GHACOF) forecast, the remainder of the season (October-December) is likely to be characterized by low and erratic amounts of rains that will severely constrain the possibility of crops to recover. As a result, “short-rains” production prospects are unfavorable, leading to a second consecutive poor harvest in these areas after the below-average “long-rains” output gathered last August/September.

Average production expected from 2016 “long-rains” season crops

In western uni-modal rainfall areas, harvesting of the 2016 “long-rains” season crops is ongoing and will continue until the end of the year. Production is forecast at average levels as precipitations in most surplus-producing areas resumed after a prolonged dry spell between end-May and early June with a positive effect on yields.



Aggregate cereal production in 2016 is early forecast at low 4.1 million tonnes, mainly due to the below-average output expected for the “short-rains” season crops to be harvested early next year. Accordingly, cereal import requirements for the 2016/17 marketing year (July/June) are set at 2.7 million, about 15 percent higher than the level of the average of the previous five years.

Dry weather affecting grazing resources in eastern and northeastern pastoral areas

Poor rains affected pasture, browse and water availability in the most pastoral and agro-pastoral areas. The (March-May) “long-rains” were characterized by a late start and low rainfall amounts, especially in eastern and northeastern Garissa, Marsabit and Tana River counties, limiting pasture regeneration before the start of the August-October dry season. The poor start of the ongoing “short-rains” season has caused a further deterioration of pasture conditions in these areas. As a result, milk production in October was up to 80 percent below-average, livestock body conditions are generally poor and drought-related deaths of animals have been reported in Kilifi, Kwale and Lamu counties. Trekking distances are increasing and animals tend to concentrate in the remaining areas with some pasture, causing its quick deterioration. As the remaining part of the “short-rains” season is forecast to be below-average in cumulative amounts, rangeland conditions are expected to remain depressed and a faster-than-normal depletion is expected to take place during the next dry season between January and March 2017.

Maize prices firm or increasing in October

In most markets, wholesale prices of maize remained firm or increased in October despite the ongoing “long-rains” main season harvest. Prices of maize in October were around their year-earlier levels in Nairobi and Mombasa, the largest urban areas, as sustained imports from neighbouring Uganda contributed to contain the recent price increases. By contrast, October prices were well above their levels of one year earlier in other monitored markets, including Kisumu, located in a deficit rural area and Eldoret located in a key surplus-producing area of the Rift Valley.

Concerning food insecurity conditions in most pastoral and agro-pastoral areas

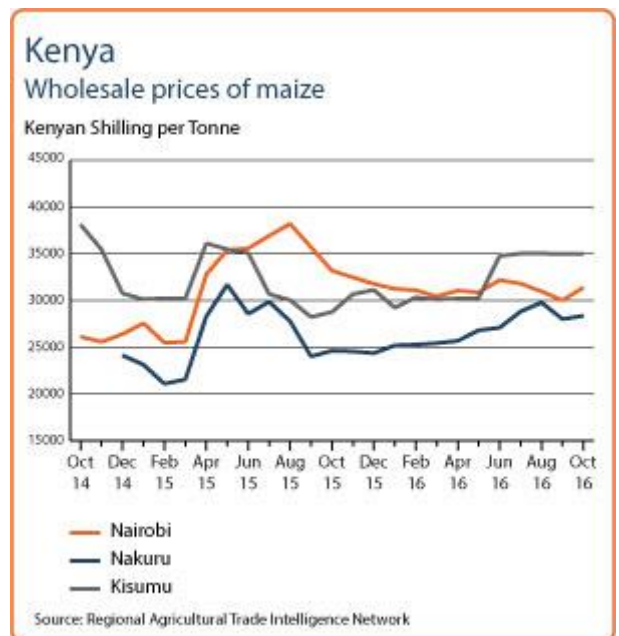
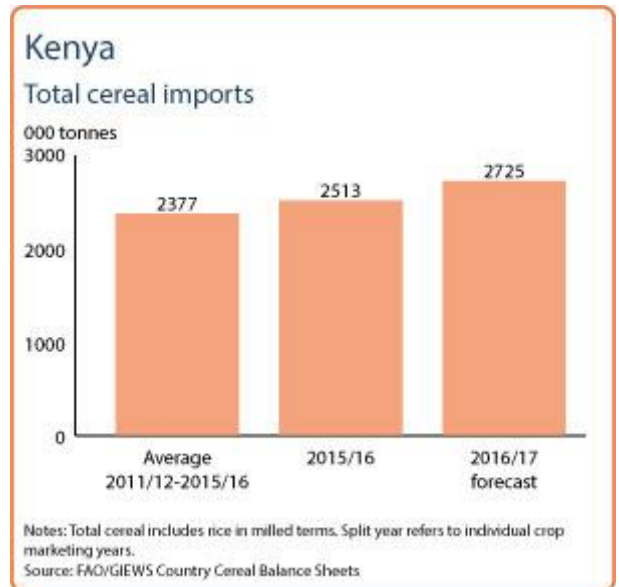
According to the latest national food security assessment, the overall number of people in need of humanitarian assistance is estimated at about 1.25 million, up from 700 000 in February 2016. The most acute food insecure people are located in pastoral and agro-pastoral areas, with a higher concentration in Tana River, Garissa and Isiolo counties. The poor performance of the ongoing “short-rains” has induced households to keep much of their livestock in the dry season grazing areas, limiting access to livestock products as a source of food and income. Although livestock body conditions and milk production may slightly improve during the remainder of the rainy season, the overall food availability and access for most pastoral households is expected to be very low until the start of the 2017 “long-rains” season in March.

In southeastern and coastal areas, most households have already depleted food stocks from the below-average “long-rains” harvest gathered last July/August and mostly rely on local markets to satisfy their food needs. In addition, the reduced and

Kenya
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	3 537	3 600	3 200	-11
Wheat	382	420	400	-5
Sorghum	169	170	150	-12
Others	323	359	354	-1
Total	4 411	4 549	4 104	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



delayed planting activities of “short-rains” crops due to current dry weather conditions have significantly limited casual labour opportunities and household incomes, thus constraining food access.

The country hosts a large number of refugees and asylum seekers, with about 330 000 refugees from the Federal Republic of Somalia as of late September 2016. About 80 percent of them reside in the Dadaab refugee camp in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to a high concentration of people. In addition, as of late October, about 90 000 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013, with most of them currently residing in the northwestern area of Kakuma in Turkana county.



GIEWS Country Brief Kenya

Reference Date: 26-September-2016

FOOD SECURITY SNAPSHOT

- “Long-rains” crop production estimated at below-average levels
- Dry weather conditions affected pasture availability in most eastern and northeastern areas
- Prices of maize firm or on the rise in most markets
- Food security conditions worsening in most agro-pastoral and pastoral areas

Below-average production expected from 2016 “long-rains” season crops

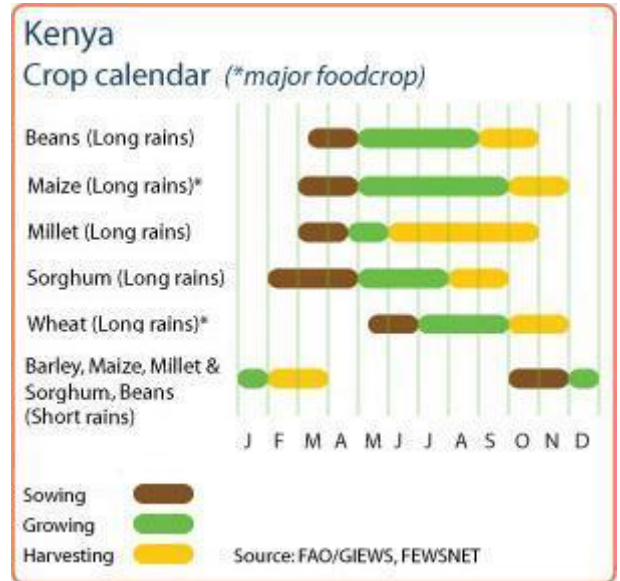
In southeastern and coastal bi-modal rainfall areas, harvesting of the 2016 “long-rains” season crops, which represents 30 percent of the local annual production, has been recently completed. Production is estimated at well-below average levels due to unfavourable weather conditions. After a late start in April, seasonal rains were poor in terms of amounts and spatial/temporal distribution in most cropping areas. Very low yields, up to only 40 percent of average, are reported in Kitui, Kilifi and Kwale counties where rainfall amounts have been particularly scarce.

In western uni-modal rainfall areas, harvesting of the 2016 “long-rains” season crops is about to start with some delay due to the late onset of rains in April which hampered planting operations. Production is forecast at near average levels as precipitations in most surplus-producing areas have been abundant, but their distribution has been erratic with a significant dry spell between end-May and early June.

Dry weather affected grazing resources in eastern and northeastern pastoral areas

Poor rains affected pasture, browse and water availability in the most pastoral and agro-pastoral areas. The rainy season (March-May) was characterized by a late start and low rainfall amounts, especially in eastern and northeastern Garissa, Isiolo and Tana River counties, limiting pasture regeneration. Better conditions of grazing resources are currently reported in northwestern Turkana, Marsabit and Samburu counties (see NDVI anomaly map) that received some late rains at the end of June and between the late July and early August.

In general, pasture conditions are expected to continue deteriorating until late October when the next rainy season is expected to begin. However, rainfall forecasts until the end of the



Kenya Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes		percent	
Maize	3 537	3 600	3 300	-8
Wheat	382	420	420	0
Sorghum	169	170	160	-6
Others	323	359	389	8
Total	4 411	4 549	4 269	-6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

year are not particularly favourable, especially if the La Niña phenomenon will occur.

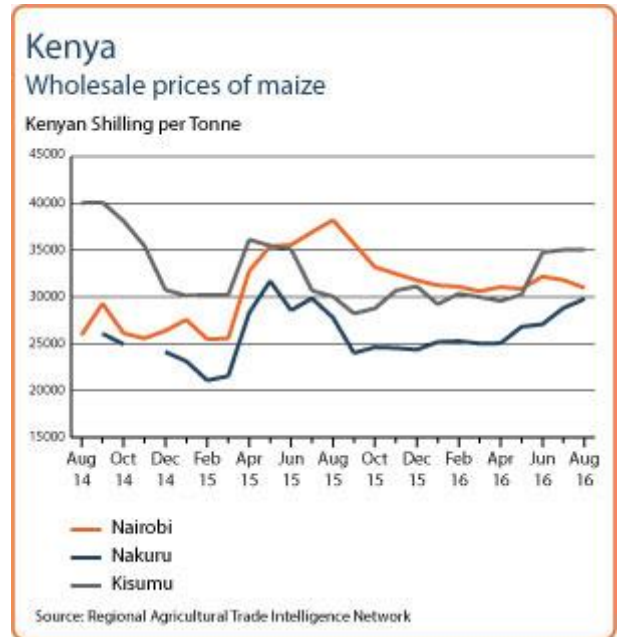
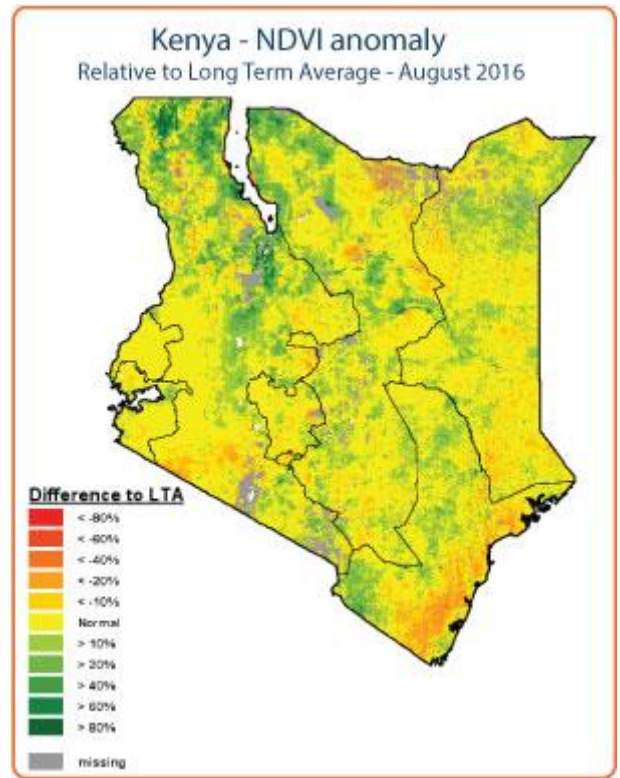
Maize prices firm or increasing in August

In most markets, wholesale prices of maize increased by between 5 and 20 percent from April to July following seasonal patterns. Subsequently, prices remained firm or continued to increase in August despite the harvest in coastal and southeastern areas due to a reduced crop output. However, in August, maize prices in the capital, Nairobi, were 20 percent lower than 12 months earlier reflecting adequate carryover stocks from the above-average 2015 harvest and imports from the neighbouring United Republic of Tanzania and Uganda.

Worsening food security situation mainly in pastoral and agro-pastoral areas

According to the latest national food security assessment, the overall number of people in need of humanitarian assistance is estimated at about 1.25 million, up from 700 000 in February 2016. The most acute food insecure people are located in pastoral and agro-pastoral areas, with a higher concentration in Tana River, Garissa and Isiolo counties. Dry weather conditions have caused mass migration of livestock to dry season grazing areas thus significantly reducing milk availability at household level. In these areas, the food security conditions are expected to worsen until early November, when the next rains will start improving pasture availability. In southeastern and coastal areas, food security has recently improved following the commercialization of the newly-harvested “long rains” crops. Nevertheless, as production has been severely affected by adverse weather condition, households are expected to deplete their cereal stocks earlier than usual, increasing their market dependence until the next “short rains” harvest in January/February 2017.

The country hosts a large number of refugees and asylum seekers, with about 336 000 refugees from the Federal Republic of Somalia as of late August 2016. About 80 percent of them reside in the Dadaab refugee camp in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to a high concentration of people. In addition, as of end-July 2016, about 51 000 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013, with most of them currently residing in the northwestern area of Kakuma in Turkana county.



Reference Date: 27-April-2016

FOOD SECURITY SNAPSHOT

- “Short-rains” crop production estimated at above-average levels
- Planting of “long-rains” crops delayed by erratic onset of seasonal rains
- Prices of maize at low levels on most markets
- Food security conditions improving in most agro-pastoral and pastoral areas

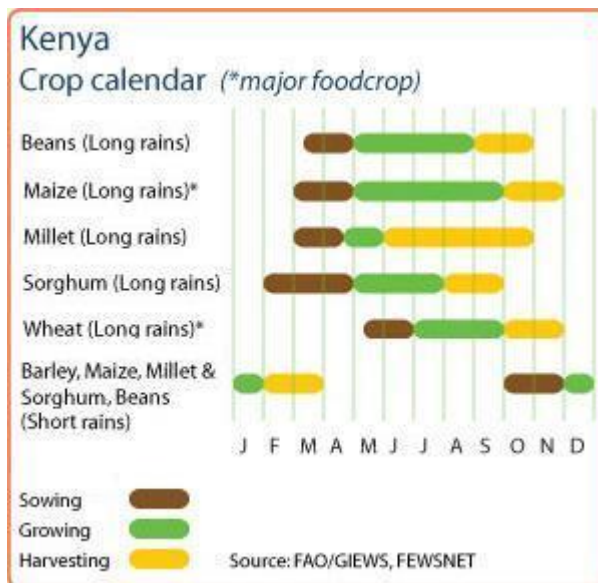
“Short-rains” 2015/16 season harvest estimated at above-average levels

The 2015/16 “short-rains” harvest has just been completed in bi-modal rainfall areas and crop production is estimated at about 15 percent above the last five-year average. Yields have been particularly good in most southeastern areas where, despite some localized floods, rainfall has been timely and abundant (supported by the prevailing El Niño conditions) and well-distributed, inducing farmers to significantly increase the area planted. By contrast, in coastal marginal agricultural areas, the “short-rains” had an uneven temporal and spatial distribution that affected crop development, especially maize, of which local production is officially estimated to be about 10-30 percent below the average of the previous five years.

Aggregate cereal production in 2015 is estimated at 4.5 million tonnes, about 3 percent up from the average of the previous five years. Accordingly, cereal import requirements for the 2015/16 marketing year (July/June) are set to decline by about 10 percent from the previous year to about 2.4 million tonnes, including 1.3 million tonnes of wheat and wheat flour, 610 000 tonnes of maize and 440 000 tonnes of rice.

Delayed planting of 2016 “long-rains” season crops

Planting of the 2016 “long-rains” season crops has started in April, with two-three dekads of delay, following the late and erratic start of the rainy season. After some early rains during the first dekad of March, precipitations subsided for about two dekads until early April, when they resumed in the western highlands, with particularly abundant amounts around the Lake Victoria basin. Currently, significant soil moisture deficits persist in most central and eastern cropping areas, affecting crop germination/development and pasture conditions (see NDVI anomaly map). In particular, the FAO Agricultural Stress Index (ASI) highlights a high risk of drought conditions developing in Kitui (see ASI map). According to official meteorological forecasts, rains are expected to be favourable in May in most areas of the country, likely offsetting most of the current moisture deficits, except in northern Turkana, Marsabit, Isiolo and Wajir counties, which are expected to receive average to below-average rainfall amounts.

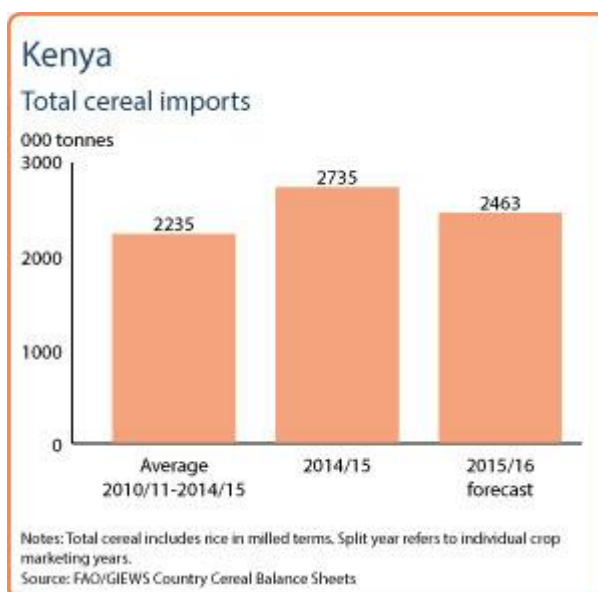


Kenya

Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	3 510	3 513	3 600	2
Wheat	400	329	420	28
Sorghum	168	178	170	-4
Others	298	325	335	3
Total	4 376	4 345	4 525	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



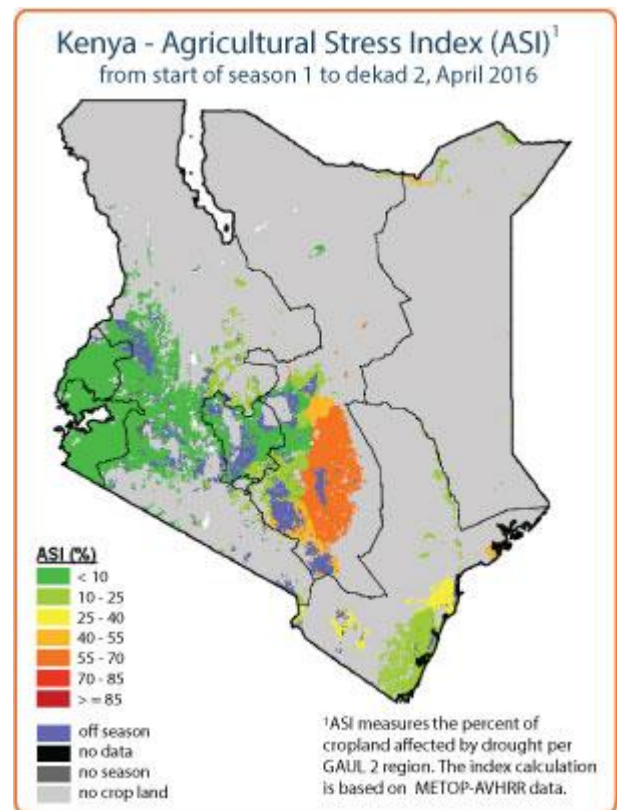
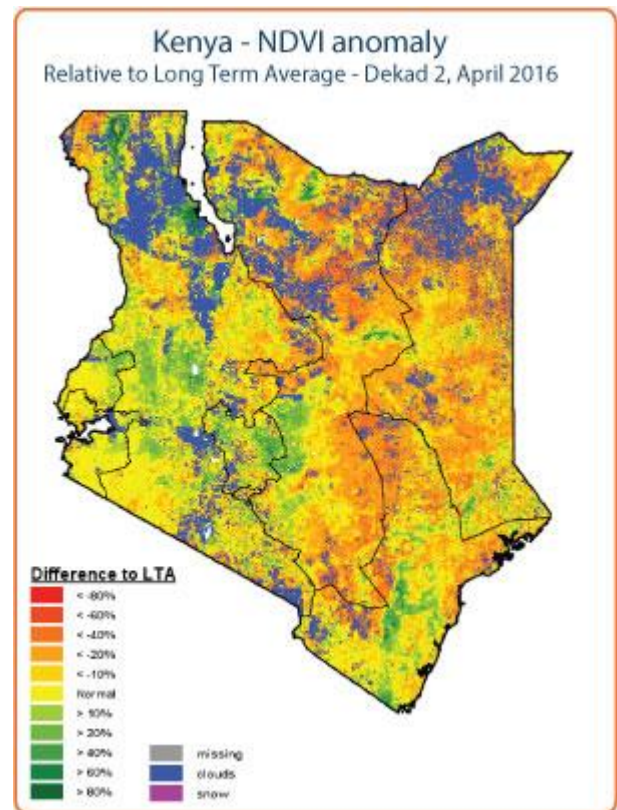
Maize prices at low levels in most markets

Wholesale prices of maize followed a steadily decreasing trend in recent months in the capital, Nairobi, declining by 14 percent between September 2015 and March 2016, as crops from the last two harvests increased market supplies. Subsequently, prices started to seasonally increase in April. In Eldoret market, located in a key-producing area of the Rift Valley, after having declined by 13 percent between September and December 2015, prices increased by 16 percent between December 2015 and February 2016, largely due to institutional purchases by the National Cereals and Produce Board to replenish the stocks of the Strategic Grain Reserve. Since then, prices remained mostly stable in March and April. Overall, maize prices in April were between 5 and 12 percent below their levels of 12 months earlier on account of two consecutive above-average harvests.

Food security situation improving in most agro-pastoral and pastoral areas

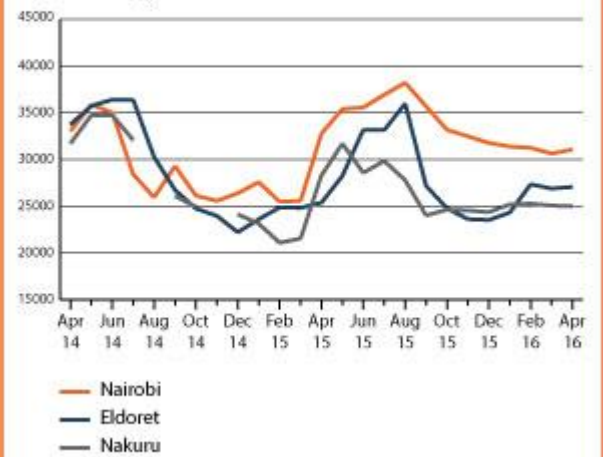
The overall food security situation has improved since the end of the lean season in October. The availability of crops from the last two good season harvests, coupled with low and declining maize prices, has generally improved households' food access. The current number of acutely food insecure people is estimated at 640 000, about 41 percent less than in August 2015.

The country hosts a large number of refugees and asylum seekers, with about 416 000 refugees from Somalia as of late March 2016. About 80 percent of them reside in the Dadaab refugee camp in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to a high concentration of people. In addition, as of mid-April 2016, about 55 000 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013, with most of them currently residing in the northwestern area of Kakuma in Turkana county.



Kenya Wholesale prices of maize

Kenyan Shilling per Tonne



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 15-February-2016

FOOD SECURITY SNAPSHOT

- “Short rains” crop production estimated at above-average levels
- Good pasture conditions in most northeastern and central pastoral areas
- Prices of maize at low levels on most markets
- Food security conditions improving in most agro-pastoral and pastoral areas

Above-average production expected from 2015/16 “short-rains” season crops

The 2015/16 “short-rains” harvest is currently underway in bi-modal rainfall areas. Cereal production is estimated at well above-average levels, with particularly good prospects for crops in southeastern and coastal areas where the ongoing harvest accounts for about 70 percent of the total annual crop production. Here, abundant rainfall, largely attributed to the strong El Niño phenomenon, despite some localized floods, benefited crops through an even temporal and spatial distribution and a timely onset, which induced farmers to significantly increase the area planted.

Aggregate cereal production in 2015 is estimated at 4.3 million tonnes, 9 percent up from last year and similar to the average of the previous five years. Accordingly, cereal import requirements for the 2015/16 marketing year (July/June) are set to decline by about 9 percent from the previous year to about 2.8 million tonnes, including 1.32 million tonnes of wheat and wheat flour, 810 000 tonnes of maize and 550 000 tonnes of rice.

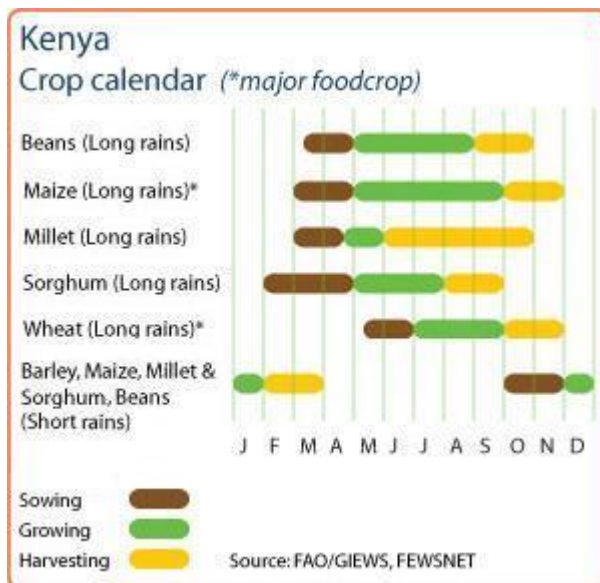
Good pasture conditions in most northern pastoral areas

In several northern pastoral areas, the abundant “short-rains” have led to the seasonal recovery of rangeland and recharged key water points, increasing livestock productivity and improving food security. The trekking distance to grazing and watering sources has declined to less than 10 kilometres and nearly 90 percent of livestock have migrated back to wet-season grazing areas near homesteads. Livestock body conditions range from fair to good in most areas and are expected to improve further.

By contrast, parts of Isiolo, Wajir, and Garissa counties have been affected by below-average precipitation, with a negative impact on rangeland conditions (see NDVI map).

Maize prices at low levels in most markets

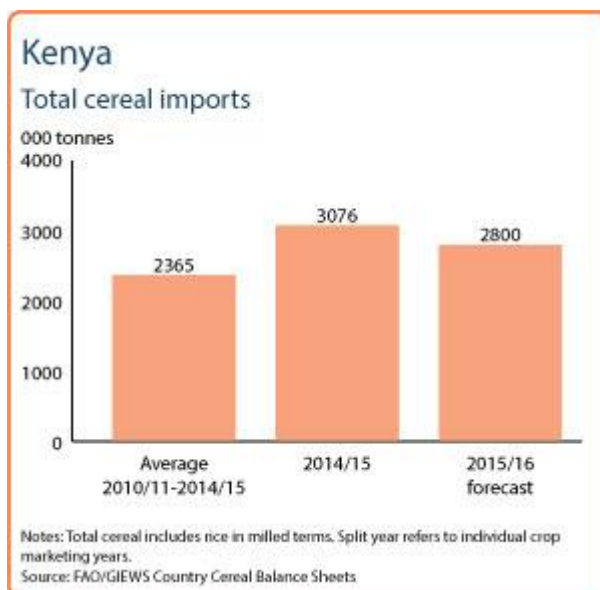
Wholesale prices of maize declined by 10-12 percent from September to December 2015 in most markets with the commercialization of the 2015 “long-rains” season crops. In January, prices leveled-off in the capital, Nairobi, while in Eldoret and Mombasa they started to seasonally increase. Overall, prices in January were around or below



Kenya Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	3,430	3,113	3,400	9
Wheat	400	329	420	28
Sorghum	168	178	140	-21
Others	259	284	309	9
Total	4,257	3,904	4,269	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

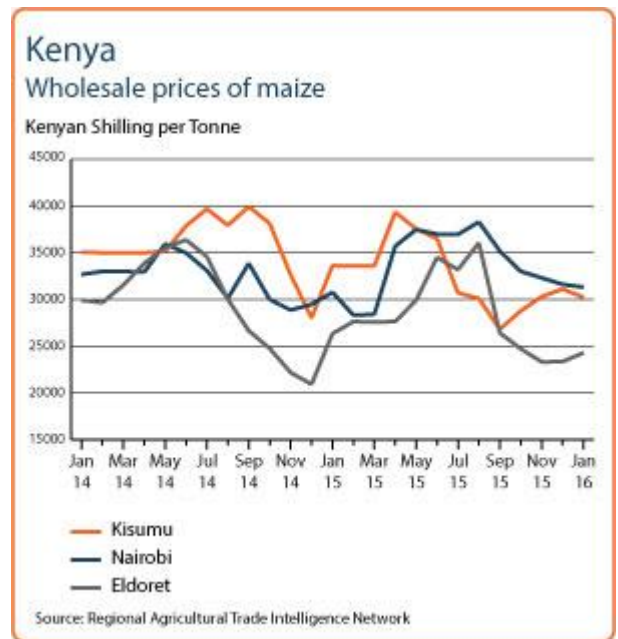
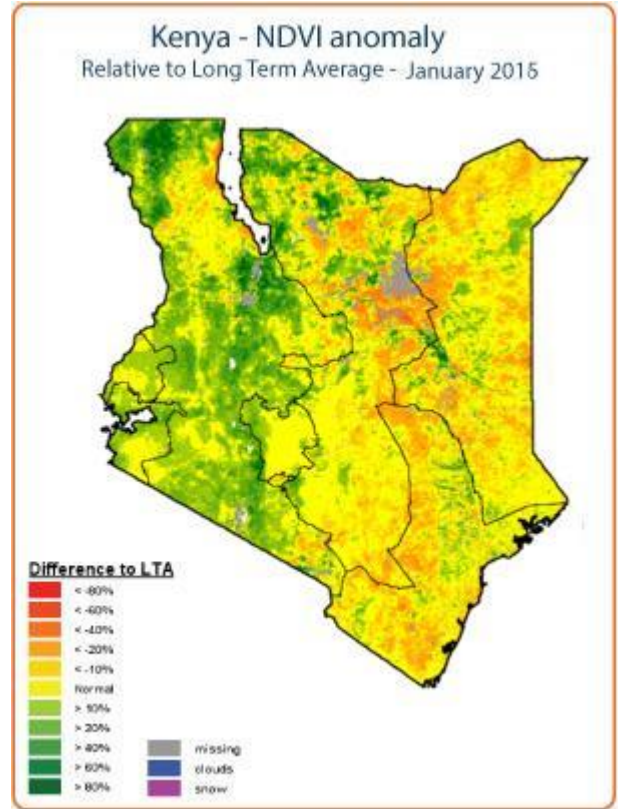


their levels of 12 months earlier, on account of adequate domestic availabilities and substantial imports from Uganda and the United Republic of Tanzania.

Food security situation improving in most agro-pastoral and pastoral areas

The overall food security situation has improved since the end of the lean season in October. The availability of crops from the good 2015 “long-rains” season harvest, coupled with low and declining maize prices has generally improved households’ food access. In the southeastern and coastal marginal agricultural areas, the above-average “short-rains” harvest will further support household food security. In most pastoral areas, pasture is available near homesteads, due to above-average “short-rains”: as a result, few livestock have migrated and households have access to milk, improving food security.

The country hosts a large number of refugees with about 419 000 refugees from Somalia as of early January 2016. About 80 percent of them reside in Dadaab and Alinjugur refugee camps in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of January 2016, an estimated 97 000 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013 and most of them are currently residing in the northwestern area of Kakuma in Turkana county.



Reference Date: 05-November-2015

FOOD SECURITY SNAPSHOT

- “Long-rains” cereal production estimated at above-average level
- Poor conditions of grazing resources in some pastoral areas of Eastern and North-Eastern provinces
- Prices of maize declining in most markets as newly-harvested crops and sustained imports increased supplies
- Food security conditions start to improve in most agricultural areas as newly-harvested crops become available for consumption

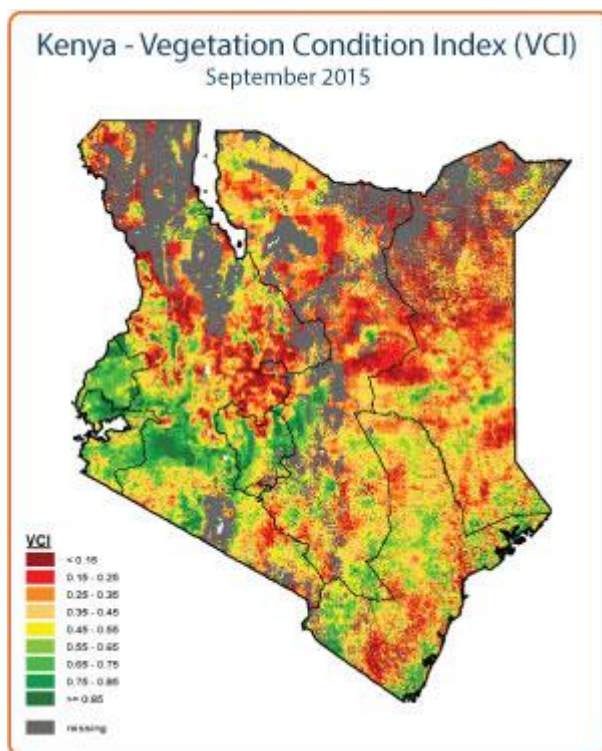
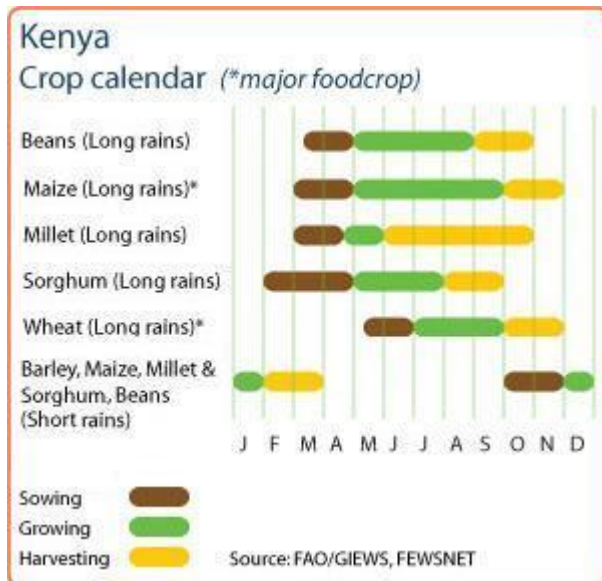
Above-average production expected from 2015 “long-rains” season crops

Harvesting of the 2015 “long-rains” season maize crop was completed in August in most southeastern areas, while it is underway in the high and medium potential areas of southern Rift Valley and Central provinces, where it will continue until the end of the year. In these areas (Kericho, Nakuru, Nandi, Trans Nzoia, Uasin Gishu counties), after a late onset in the third dekad of March, abundant precipitation in April and May was followed by below-average rainfall in July and August. However, cumulative seasonal amounts were at average levels and, according to remote sensing analysis, vegetation conditions in September were good (see Map 1).

In low potential areas outside the Rift Valley “grain basket”, seasonal rains had a late onset and an erratic temporal distribution in parts and, despite near-normal cumulative seasonal amounts, a negative impact on vegetation conditions is reported in West Pokot and Baringo counties in the West, in Nyeri and Embo counties in the centre, in Narok, Kajado, Makueni, Kitui and Taita Taveta counties in the south and in Lamu county on the coast.

Planting of the 2015 “short-rains” season crops has started in mid-October in most bi-modal rainfall southeastern and coastal lowlands. Under the forecast of a strong El Niño episode, which is likely to continue into the first months of next year, rains are expected at above-average levels until December, thus benefiting crops. However, exceptionally heavy rains could increase the risk of flash floods in low-lying areas, negatively affecting standing crops, livestock and destroying rural infrastructures.

Aggregate cereal production in 2015 (including a forecast of a slightly above-average output for the “short-rains” season to be harvested by early 2015) is forecast at 4.3 million tonnes, about 6 percent above the last five-year average. Accordingly, cereal import requirements for the 2015/16 marketing year (July/June) are set at 2.8 million tonnes, 5 percent below the level of last year but 20 percent higher than the average of the previous five years.



Poor grazing resources in some eastern and northeastern pastoral and agro-pastoral areas

In eastern and northeastern pastoral and agro-pastoral areas, parts of Isiolo, Wajir, Mandera, Marsabit and Samburu counties received below-average March to May seasonal rains. In these areas, grazing resources are almost completely exhausted. Trekking distances have increased, livestock body condition ranges from fair to poor and milk production is generally below average, atypically declining by 40 percent between May and June. In addition, outbreaks of Foot-and-Mouth Disease (FMD) and of goat and sheep pox occurred in Isiolo and Wajir counties.

Maize prices declining in most markets

Maize prices, after having peaked in August, decreased between August and October by 10-28 percent in most markets as the start of the “long-rains” harvest in southern areas of the Rift Valley Province and substantial imports from Uganda and the United Republic of Tanzania (where main harvests were gathered in May/July) have increased supplies in local markets. Current maize prices are at about the same levels of 12 months earlier, except in the capital, Nairobi, where they are about 30 percent higher than their year-earlier levels due to sustained local demand.

Food security still a concern in some pastoralist areas, but improving in crop producing areas

According to the Government-led 2015 “Long-rains” season assessment report, in August 2015, 1.1 million people were acutely food insecure. The areas most affected by food insecurity are parts of Isiolo and Wajir county in the northern pastoralist livelihood zone where livestock numbers and conditions have been negatively impacted by erratic rainfall in the past three seasons. In these areas, the imminent establishment of the “short-rains” is expected to have positive effects on pastoralists’ food security by early December as grazing resources gradually improve leading to better livestock productivity.

In major agricultural areas, food security conditions have started to improve following the increasing availability of newly-harvested “long-rains” crops in local markets. The overall number of food insecure people is expected to decline gradually until the end of the year, when the bulk of 2015 “long-rains” crops will be harvested and some green and early maturing “short-rains” crops will be ready for consumption in southeastern marginal agricultural areas. Households’ access to food is also expected to improve as staple food prices continue their declining trend and more labour opportunities become available during the “short-rains” season.

The country hosts a large number of refugees with about 421 500 refugees from Somalia as of early October 2015. About 80 percent of them reside in Dadaab and Alinjugur refugee camps in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of 1 October 2015, an estimated 93 843 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December 2013 and are currently residing in the northwestern area of Kakuma in Turkana county.

Kenya

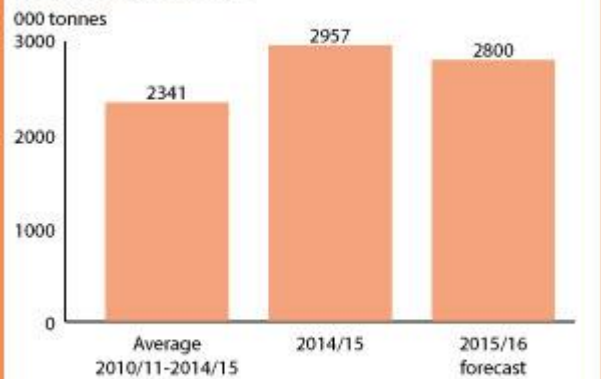
Cereal production

	2010-2014	2014	2015	change
	average		forecast	2015/2014
	000 tonnes		percent	
Maize	3 307	2 700	3 400	26
Wheat	425	415	420	1
Sorghum	150	120	140	17
Others	265	294	309	5
Total	4 147	3 529	4 269	21

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kenya

Total cereal imports

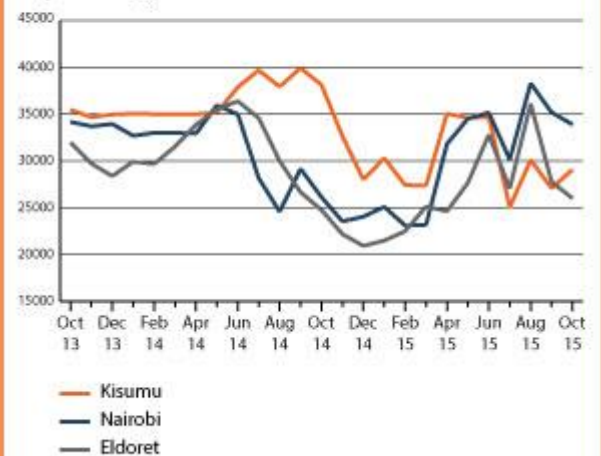


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kenya

Wholesale prices of maize

Kenyan Shilling per Tonne



Source: Regional Agricultural Trade Intelligence Network

Kenya

Integrated Food Security Phase Classification
Projection September 2015 - February 2016



Reference Date: 04-February-2015

FOOD SECURITY SNAPSHOT

- “Short-rains” crop production estimated at below-average level
- Poor conditions of grazing resources in northeastern and central pastoral areas, while beneficial rains improved pasture availability in northwest
- Prices of maize continue to decline due to adequate supply
- Food security conditions expected to deteriorate in southeastern and coastal agricultural areas as well as northeastern pastoral areas

Below-average production expected from 2014/15 “short-rains” season crops

In bi-modal rainfall southeastern and coastal lowlands, harvesting of 2014/15 “short-rains” season crops is expected to start in February and production is forecast at below-average levels due to erratic rainfall. The October to December “short-rains” season has performed poorly, with late onset, below average amounts and early cessation by the first dekad of December. Extensive replanting was needed especially in Kitui, Makueni, Tharaka Nithi, Embu and Nyeri counties, with consequent significant delay for crops to reach maturity and be harvested. The “short-rains” season cereal harvest normally accounts for about 20-25 percent of the country’s total annual production.

Aggregate cereal production in 2014 is estimated at 3.6 million tonnes, about 10 percent below last five-year average. Accordingly, cereal import requirements for the 2014/15 marketing year (July/June) are set at an above-average level of about 2.5 million tonnes, including 1.1 million tonnes of wheat and wheat flour, 900 000 tonnes of maize and 445 000 tonnes of rice.

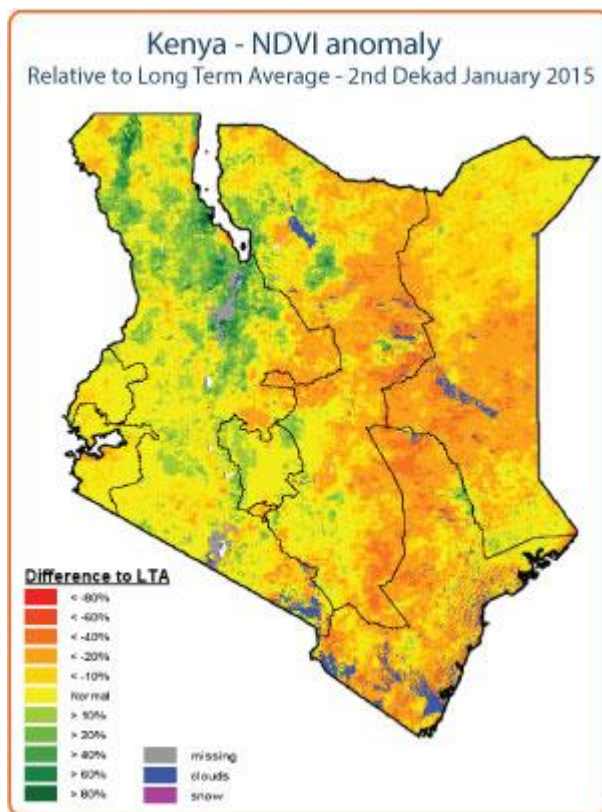
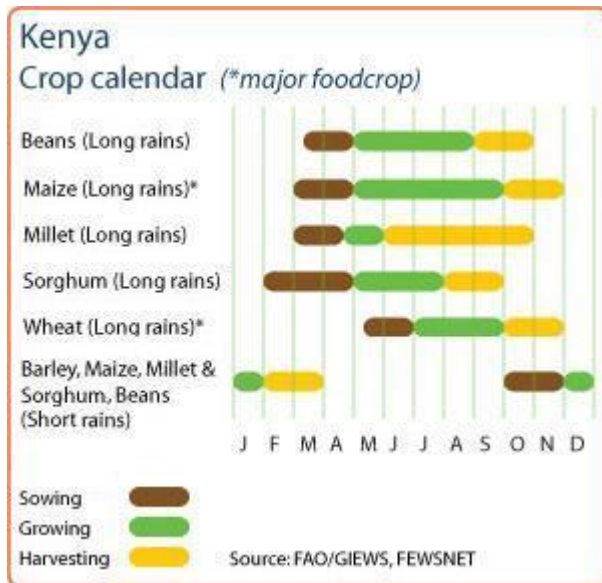
Poor pasture conditions in most northeastern and central pastoral areas

In most northeastern and central pastoral areas, the “short-rains” season started with a substantial delay of 3-4 dekads and has been extremely poor in terms of rainfall amounts and distribution, with significant moisture deficits reported in Isiolo, Wajir, eastern Marsabit and northern Garissa counties. Trekking distances have generally increased, livestock body condition ranges from fair to poor and milk production is generally below average. In these areas, pasture conditions and water availability are expected to deteriorate further during the current dry season, until the 2015 “long-rains” season will likely start in March.

By contrast, beneficial rains in October and November have improved rangeland conditions in northwestern pastoral areas of Turkana, Samburu, Baringo, West Pokot and western Marsabit counties, where animal body condition is currently between fair and good.

Maize prices at low levels in most markets

In 2014, maize prices have substantially decreased between June/July and November/December. In main urban markets of Nairobi and



Mombasa, wholesale maize prices declined between June and December by 32 and 45 percent, respectively. The adequate availability of 2015 “long-rains” season crops coupled with substantial imports from Uganda and the United Republic of Tanzania have increased supplies in local markets, exerting downward pressure on prices. Currently, despite some recent increases, maize is traded in most wholesale markets at about USD 235-280 per tonne, about 20-40 percent below the levels of 12 months earlier.

Food security expected to deteriorate in southeastern and coastal agricultural areas as well as in northeastern pastoral areas

The overall food security situation has improved since the end of the lean season in October. The availability of the 2014 “long-rains” season crops coupled with low and declining maize prices has generally improved households’ food access. However, the poor performance of the 2014/15 “short-rains” season in southeastern and coastal zones is expected to lead to a significant deterioration of local food security conditions as food stocks will be only partially replenished and households will have to rely more on markets for their food requirements. Food security conditions are also expected to deteriorate for most pastoralists in northeastern areas of Isiolo, Wajir and Garissa counties, where grazing resources were not adequately regenerated during the past “short-rains” season and will then deteriorate quickly during the ongoing January-March dry season.

As of early January 2015, the country hosts about 585 300 refugees and asylum seekers, mainly from Somalia and South Sudan. About 80 percent of Somali refugees reside in Dadaab refugee camps in northeastern Garissa county, where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, an estimated 89 500 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December and are currently residing in the northwestern area of Kakuma in Turkana county. Latest reports indicate that the most pressing needs include protection for separated children, registration and health services.

Kenya
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	3 255	3 391	2 750	-19
Wheat	385	486	450	-7
Sorghum	146	139	120	-14
Others	235	292	285	-2
Total	4 021	4 308	3 605	-16

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 13-November-2014

FOOD SECURITY SNAPSHOT

- “Long rains” cereal production estimated at below-average level
- Persisting poor conditions of grazing resources in most pastoral areas of Eastern and North-Eastern provinces
- Prices of maize continue to decline due to adequate supply
- Food security conditions start to improve in most agricultural areas as newly-harvested crops become available for consumption

Below-average production expected from the 2014 “long rains” season crops

Harvesting of the 2014 “long rains” season maize crop was completed in August in most southeastern areas, while it is underway in the high and medium potential areas of northern Rift Valley and will continue until the end of the year. The seasonal maize production is estimated at below-average levels due to unfavourable rains that affected crop germination and development as well as to the increased incidence of the viral Maize Lethal Necrosis Disease (MLND).

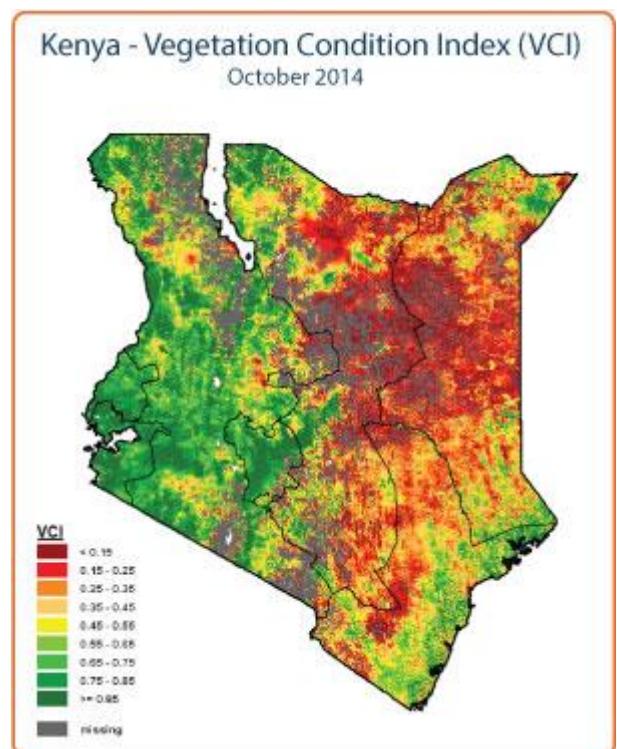
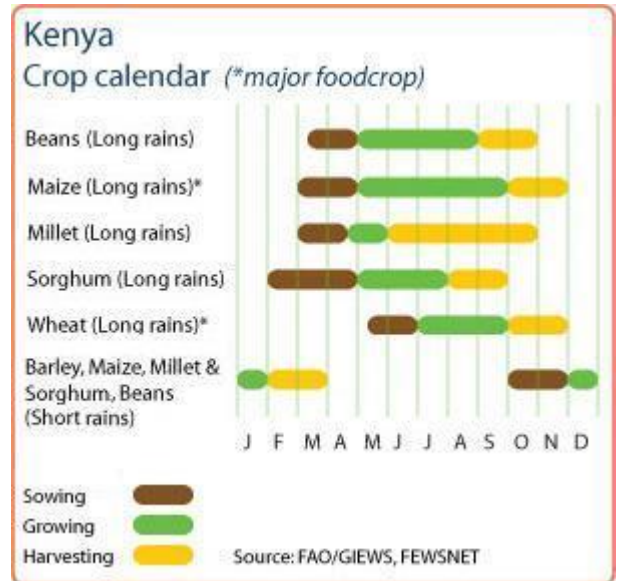
Planting of the 2014 “short rains” season crops has started in mid-October in most bi-modal rainfall southeastern and coastal lowlands. According to the latest Greater Horn of Africa Climate Outlook by the IGAD Climate Prediction and Applications Centre (ICPAC), rains until December are expected to be average to above-average, with likely positive impact on crops to be harvested early next year. However, as shown by the NDVI anomaly map, significant moisture deficits remain in southeastern counties of Makueni and Kitui.

Aggregate cereal production in 2014 (including a forecast of a slightly above-average output for the “short rains” season to be harvested by early 2015) is forecast at 3.5 million tonnes, about 12 percent below last five-year average. Accordingly, cereal import requirements for the 2014/15 marketing year (July/June) are set at an above-average level of about 2.5 million tonnes, including 1.1 million tonnes of wheat and wheat flour, 900 000 tonnes of maize and 445 000 tonnes of rice.

Poor grazing resources in most eastern and northeastern pastoral and agro-pastoral areas

In eastern and northeastern pastoral and agro-pastoral areas, the “short rainy” season has generally not yet started and significant moisture deficits are reported in parts of Isiolo, Wajir and Garissa counties. As these areas received below-average March to May seasonal rains, grazing resources are almost completely exhausted. Trekking distances have increased, livestock body condition ranges from fair to poor and milk production is generally below average. By contrast, unusual off-season rains between July and early September as well as during the first half of October have improved rangeland conditions in northwestern pastoral areas of Turkana, Samburu, Baringo and West Pokot counties where animal body condition is currently between fair and good.

Maize prices continue to decline in most markets



Maize prices have substantially decreased since last July in most markets. In main urban markets of Nairobi and Mombasa, prices between July and October were down by 27 and 38 percent, respectively. Substantial imports from Uganda and the United Republic of Tanzania (where main harvests were gathered in May/July) and the start of the “long rains” harvest in southern areas of the Rift Valley have increased supplies in local markets, exerting downward pressure on prices. In October, maize was traded in the Nairobi wholesale market at about USD 290 per tonne, about 25 percent below the levels of 12 months earlier.

Food security is still a concern in pastoralist areas, but improves in crop producing areas

The number of people in need of humanitarian assistance reached its peak at about 1.5 million people in October, at the end of the lean season. Most of affected people were concentrated in pastoral areas of Marsabit, Wajir and Isiolo counties in the northeast as well as in pocket areas of Samburu and Turkana counties in the northwest. In these areas, the imminent establishment of the “short rains” is expected to have positive effects on pastoralists’ food security by early December as grazing resources gradually improve leading to better livestock productivity.

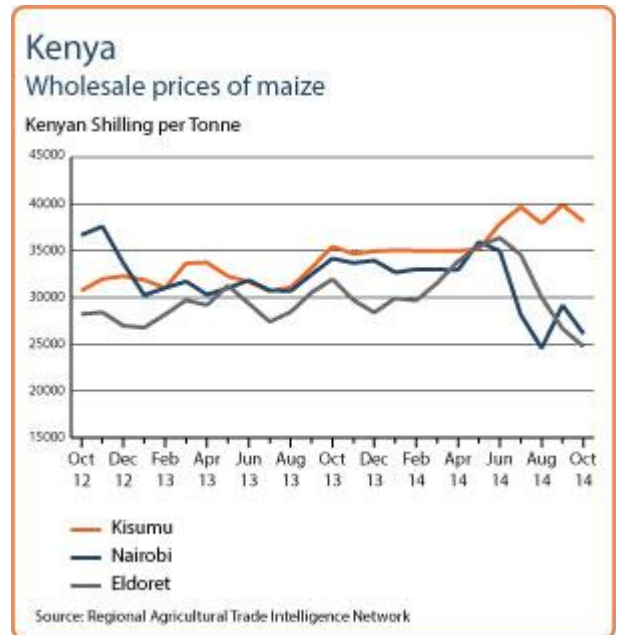
In major agricultural areas, food security conditions have started to improve following the increasing availability of newly-harvested “long rains” crops in local markets. The overall number of food insecure people is expected to decline gradually until the end of the year, when the bulk of 2014 “long rains” crops will be harvested and some green and early maturing “short rains” crops will be ready for consumption in southeastern marginal agricultural areas. Households’ access to food is also expected to improve as staple food prices continue their declining trend and more labour opportunities become available during the “short rainy” season.

The country hosts a large number of refugees with about 427 500 refugees from Somalia as of end-October 2014. About 80 percent of them reside in Dadaab refugee camps in northeastern Garissa county where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of 10 November 2014, an estimated 44 130 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December and are currently residing in the northwestern area of Kakuma in Turkana county. Latest reports indicate that the most pressing needs include protection for separated children, registration and health services.

Kenya
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Maize	3 255	3 391	2 700	-20
Wheat	385	486	450	-7
Sorghum	146	139	100	-28
Others	235	292	285	-2
Total	4 021	4 308	3 535	-18

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 19-September-2014

FOOD SECURITY SNAPSHOT

- Erratic and below-average rains affected the 2014 “long-rains” season crops
- Below-average conditions of grazing resources in most pastoral areas of Eastern and North-Eastern provinces
- Prices of maize and beans decline in most markets following sustained imports from neighbouring countries
- Food security conditions worsen in most pastoral and agro-pastoral areas

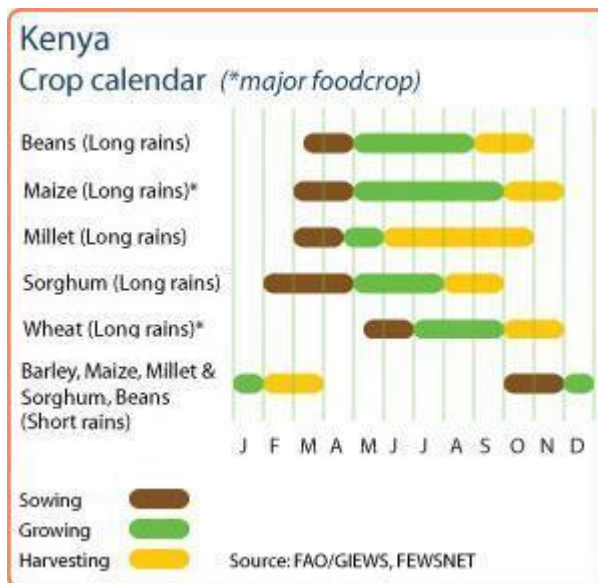
Below-average production expected from the 2014 “long-rains” season crops

In bi-modal rainfall southeastern and coastal lowlands, harvesting of the 2014 “long-rains” season (March-June) crops have just been completed. Seasonal rains were characterized by a timely good start in the second dekad of March, which supported planting activities that were then followed by poor amounts and distribution in most cropping areas together with the early cessation at the beginning of May. Consequently, significantly lower maize yields were reported in some areas of Taita Taveta, Kitui, Makueni, east Kajiado and west Kwale counties.

In western uni-modal rainfall areas, harvesting of the 2014 “long-rains” season crops has just started in southern Rift Valley counties of Bomet, Nyamira and Kericho and is expected to be concluded by end-November. Overall production is forecast at below-average levels due to unfavourable seasonal rains in most cropping areas. A series of dry spells during the season have affected crop germination and development as well as led to increased incidence of pests and diseases. In particular, outbreaks of the viral Maize Lethal Necrosis Disease (MLND) caused crop losses in Nandi, Uasin Gishu, Elgeyo Marakwet and Trans Nzoia counties. Since mid-August, rains resumed in most western cropping areas, in particular in Western and Nyanza provinces, with a likely positive impact on yields of late-planted cereal crops to be harvested at the end of the year.

According to the latest Greater Horn of Africa Climate Outlook by the IGAD Climate Prediction and Applications Centre (ICPAC), rains until the end of the year are expected to be average to above-average in western key-cropping areas as well as eastern and coastal areas where the planting of the “short-rains” season crops is expected to start by early November.

Cereal production in 2014 (including an average output for the “short-rains” season to be harvested by early 2015), is forecast at below-average levels, with about a 10 percent decline compared to the previous year. Accordingly, cereal import requirements for the 2014/15 marketing year (July/June) are forecast at over 2.7 million tonnes (including 1.3 million tonnes of wheat and wheat flour, 900 000 tonnes of maize and 445 000 tonnes of rice), about 14 percent above the previous year.



Kenya
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Maize	3 255	3 391	3 000	-12
Wheat	385	486	450	-7
Sorghum	146	139	140	1
Others	228	260	259	0
Total	4 014	4 276	3 849	-10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Dry weather conditions affected grazing resources in eastern and northeastern pastoral areas

Poor rains affect pasture and water availability in most pastoral and agro-pastoral areas. The March-May rainy season was characterized by low rainfall amounts and early cessation at the end of April, limiting pasture regeneration in most areas. Currently, severe dry weather conditions persist in some pastoral areas of Eastern and Northeastern provinces, such as Isiolo, southwestern Marsabit, southern Wajir and Garissa counties, as documented by the latest Vegetation Health Index (see map). In these areas, trekking distances have increased and livestock migration to dry season grazing areas started earlier than usual, with some herds moving to neighbouring Ethiopia and Somalia. Animal body condition range from fair to poor and milk production is generally below average.

Pasture conditions are expected to deteriorate further until late October when the next rainy season is expected to begin. Rainfall forecasts until the end of the year are particularly favourable in pastoral areas of eastern counties of Mandera, Wajir, Garissa and Tana River. However, some improvements in pasture conditions are already occurring in northwestern Turkana county, following unseasonal beneficial rains received since mid-August.

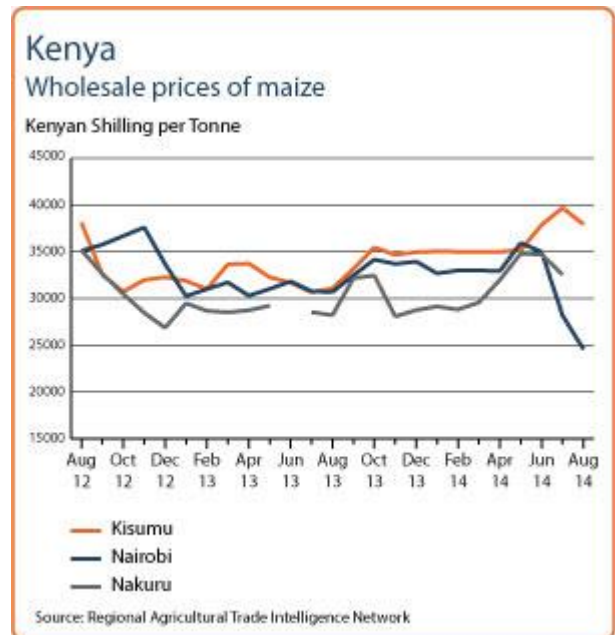
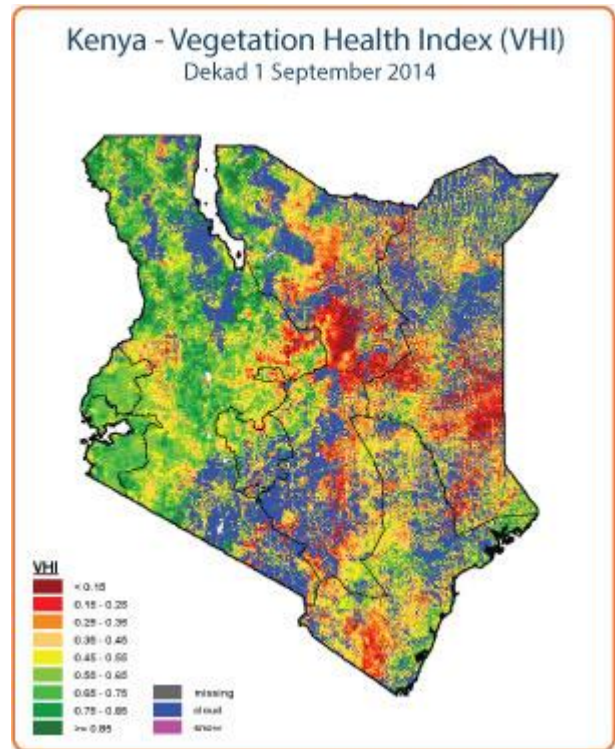
Maize prices drop in most markets due to substantial imports from neighbouring countries

Maize prices have substantially declined during the last two months in main markets, following the harvest in coastal and southeastern areas as well as a continuous flow of imports from United Republic of Tanzania and Uganda. In the Nairobi wholesale market, maize was traded in August at an average USD 280 per tonne, over 30 percent below the level of last May/June. Such a sharp decline may negatively impact the farm gate prices of the “long rains” maize crop, for harvest from October in western parts of the country, while affecting planting decisions of the “short rains” season maize crop from early November in southern and coastal regions. A similar trend is followed by beans, an important source of protein in the local diet and export crop, whose wholesale price declined from USD 800-900 per tonne in June to USD 560-660 per tonne in August.

Worsening food security situation in most pastoral and agro-pastoral areas

Most households in pastoral and agro-pastoral areas are currently in Stress IPC Phase 2, with pockets of Crisis IPC Phase 3 in Turkana, Marsabit, eastern Samburu and northern Wajir. Food security conditions are expected to continue to deteriorate until the start of the next rainy season in November. In southeastern and coastal areas, the lean season started in July instead of August for some households that harvested a below-average “short-rains” season production in January/February and did not plant short-cycle crops during the current “long-rains” season. The overall number of people in need of humanitarian assistance is estimated at about 1.5 million, up from 1.3 million in June 2014.

The country hosts a large number of refugees with about 427 000 refugees from Somalia as of end-August 2014. Most of them reside in Dadaab camps in northern Kenya where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of 5 September, an estimated 42 680 refugees have crossed over to Kenya since violence



erupted in South Sudan in mid-December and are currently residing in the northwestern area of Kakuma in Turkana county (Rift Valley province). Latest reports indicate that the most pressing needs include protection for separated children, registration and health services.

Reference Date: 09-June-2014

FOOD SECURITY SNAPSHOT

- Dry weather conditions in April affected 2014 “long-rains” season crops in western and central cropping areas, while better prospects forecast in southeastern and coastal areas
- Grazing resources in Eastern and Northeastern provinces affected by dry weather conditions
- Prices of maize seasonably increased in recent months
- Worsening food security situation in some areas that harvested below average “short-rains” in January/February

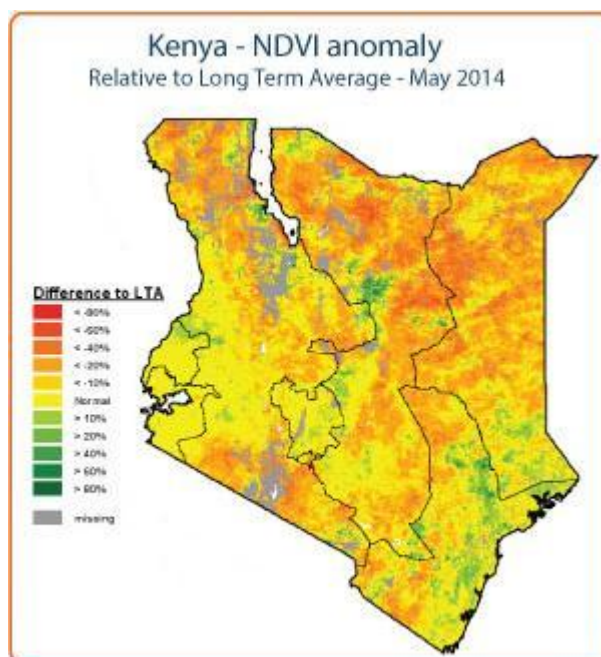
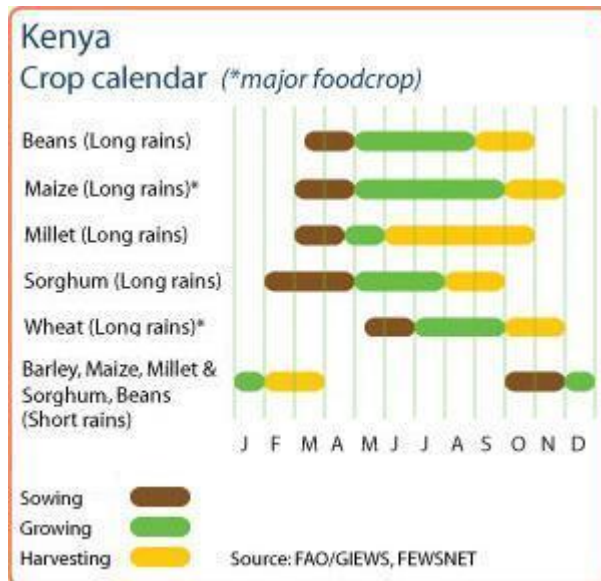
Slightly below-average production expected from the 2014 “long-rains” season crops

The 2014 “long-rains” season (March to May) started on time during the second and third weeks of March, supporting land preparation and planting activities in the western uni-modal rainfall areas. Poor spatial and temporal distribution of the rains during April resulted into a prolonged dry spell eventually retarding crop development. This was characterized by wilting, especially in key maize-producing areas in the Rift Valley and central Kenya. As rains resumed in May in most cropping areas of the former Rift Valley, Western, Nyanza, Central and Eastern (with the exception of northern Kitui county) provinces, replanting is taking place and harvesting, normally scheduled to start in August/September, is likely to be delayed. In bi-modal southeastern and coastal lowlands, where the “long-rains” season represents only 30 percent of local annual production and harvesting is expected to start earlier in July, crops are in good conditions as rainfall has been generally favourable along the season (causing also localized flooding in coastal areas in May), leading to positive NDVI anomalies (see map). In conclusion, production forecast for the aggregate 2014 “long-rains” season cereal crops is set at slightly below-average levels.

Overall, cereal production in 2014 (including a forecast of an average output for the “short-rains” season to be harvested by early 2015), is expected to decline by about 8 percent compared to last year. Accordingly, cereal import requirements for the 2014/15 marketing year (July/June) are forecast over 2.5 million tonnes, about 22 percent above the average of the previous five years.

Dry weather conditions affect grazing resources in most pastoral and agro-pastoral areas

In most pastoral and agro-pastoral areas of Eastern and Northeastern provinces (in particular, central Marsabit, western Wajir and Isiolo counties) as well as in parts of the Rift Valley province (Turkana, Baringo and West Pokot counties), dry weather conditions persist as documented by negative NDVI anomalies in May (see map). In these areas, livestock have not yet fully returned from dry season grazing areas, with negative consequences on milk availability for most households. The current below-average rangeland conditions are expected to lead to a rapid deterioration of pasture availability during the June to September dry season with a negative impact on livestock body conditions and productivity. Milk availability is likely to be affected during this period.



Kenya Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Maize	3 257	3 400	3 100	-9
Wheat	352	320	300	-6
Sorghum	150	160	155	-3
Others	229	269	249	-7
Total	3 988	4 149	3 804	-8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

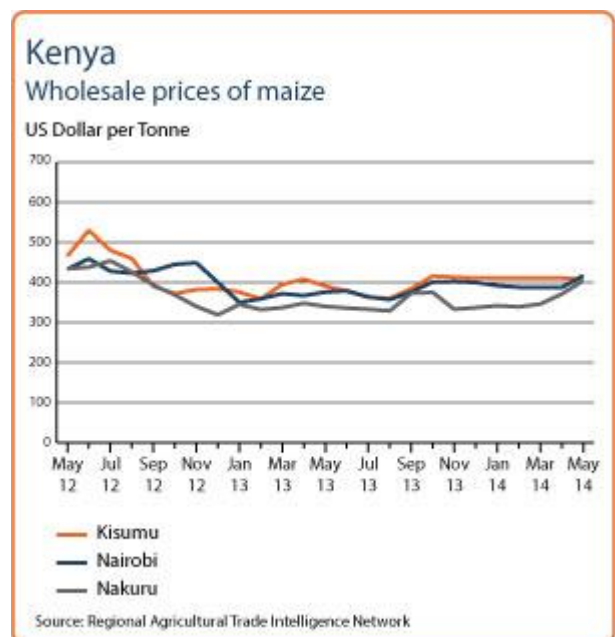
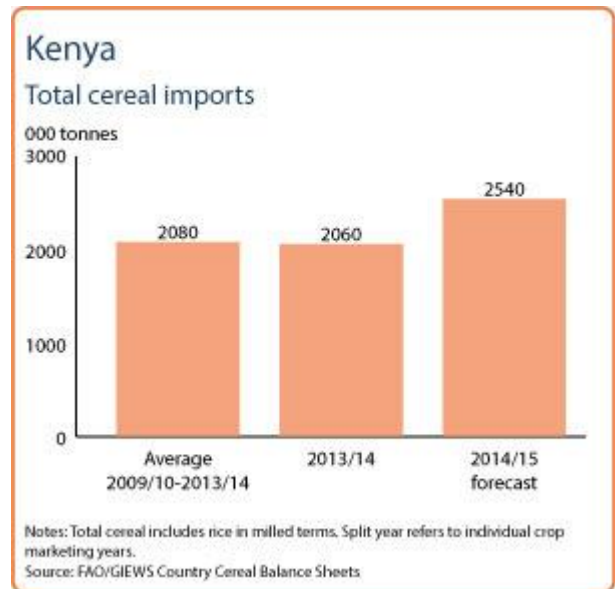
Prices of maize on the rise in recent months

Maize prices continued to increase in May in most markets following seasonal patterns compounded by a below average 2013/14 “short-rains” harvest, completed in March. Between February and May, maize prices increased in Nakuru and Eldoret markets by about 19 percent, while in Nairobi they went up by 8 percent. Overall, prices in May were between 5 and 20 percent higher than 12 months earlier. A significant flow of imports from neighboring Uganda and the United Republic of Tanzania have most likely prevented maize prices to increase further.

Worsening food security situation in some southeastern and coastal areas

Most households in pastoral and agro-pastoral areas as well as in southeastern coastal marginal agricultural livelihood zones are currently in Stress IPC Phase 2. The lean season is expected to start in July instead of August for some households in southern and coastal areas that harvested a below average “short-rains” season production in January/February and did not plant short-cycle crops during the current “long-rains” season. As the lean season progresses until green crops from the “long-rains” season become available for consumption from August, food prices are expected to increase further likely pushing those households into Crisis IPC Phase 3. In most pastoral and agro-pastoral areas, grazing resources are expected to deteriorate quickly during the dry season (June-September), with a likely consequent increase in trekking distances, reduction of water and pasture availability, early migration to dry season grazing areas and reduced production of milk.

The country hosts the largest number of refugees in the Horn of Africa, with about 426 000 refugees from Somalia as of early June 2014. Most of them reside in Dadaab camps in northern Kenya where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of 5 June, an estimated 37 700 refugees have crossed over to Kenya since violence erupted in South Sudan in mid-December and are currently residing in the northwestern area of Kakuma (Rift Valley province). The daily rate of arrival from South Sudan is as high as 500 and, by the end of the year, the total number of South Sudanese refugees in Kenya is forecast to reach 100 000-150 000 people. Latest reports indicated that the most pressing needs include protection for separated children, registration and health services.



Reference Date: 07-February-2014

FOOD SECURITY SNAPSHOT

- Below average production expected from the 2013/14 short-rains season crops in addition to the reduced output from the 2013 long-rains season harvest
- Recovery of pasture conditions expected to be short-lived due to below average rainfall
- Prices of maize firmed up in recent months despite the newly harvested crops
- Food security situation affected by below average “short rains” in parts

Below average production expected from the 2013/14 short-rains season crops

In eastern and northern bimodal rainfall areas, harvesting of 2013/14 short-rains season crops has just started and production is expected at below average levels due to erratic rainfall. The most affected areas include south-eastern and coastal marginal agricultural livelihood zones, where the delayed onset of rains resulted in considerably delayed planting, and a dry spell in November that led to poor crop development. In these areas, where the short rain crops account for up to 65 percent of the total annual crop production, the maize output is likely to be considerably below average. According to early estimates, the seasonal maize production is expected to be about 40 to 50 percent below average. In particular, in marginal mixed farming areas in Kitui, Makueni and Tharaka-Nithi counties up to 70 percent of the planted area may not be harvested, while in the marginal agricultural areas of Taita Taveta County the output is likely to be as little as one tenth of average.

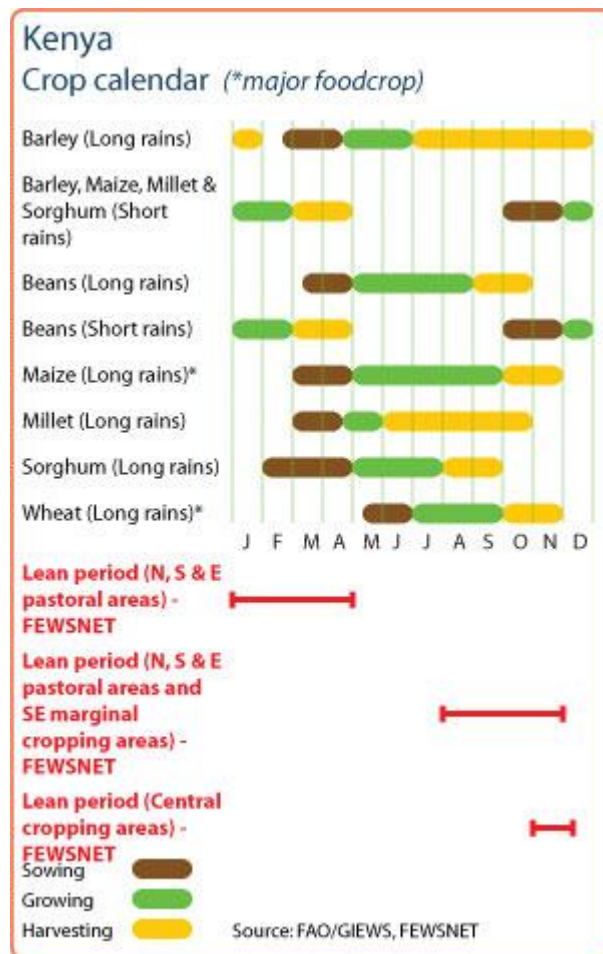
A reduced output from the 2013 long-rains season harvest

In the “grain basket”, the cropping zones in the unimodal rainfall areas in west of the country (Rift Valley, Western, Nyanza, and Central provinces) harvesting of 2013 long-rains season (March-to-June) crops was completed in November 2013. Land preparation and planting were delayed in many areas especially in parts of the Rift Valley, where some households avoided or delayed planting, fearing insecurity. In addition, yields were reduced due to poor rainfall distribution and the late availability of subsidized fertilizer, which in some cases, did not arrive until June after crops were too developed to benefit from its application. As a result, coarse grain production (that usually accounts for 30 percent of annual output) is estimated at below average levels.

Overall, cereal production in 2013 is forecast to decline by about 11 percent compared to last year. Accordingly, cereal import requirements for 2013/14 marketing year (July/June) are forecast at about of 2.36 million tonnes, 24 percent up from last year’s levels and 5 percent above the average of the previous five years.

Recovery of pasture conditions expected to be short-lived due to below average rainfall

The northern pastoral areas have had an October to December short



Kenya Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	3 050	3 603	3 200	-11
Wheat	356	442	390	-12
Sorghum	129	167	150	-10
Others	203	274	254	-7
Total	3 738	4 486	3 994	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

rains season that was below average in terms of amount and erratically distributed over both time and space. The onset of rains was delayed by one month, and by December they had subsided in almost all the areas, with some areas like Isiolo, Marsabit, and Mandera recording no rains at all in December. As a result, the improvements in pasture, browse, and water availability will be short lived, and in parts of Turkana, Isiolo, Mandera, and Wajir counties they are already exhausted.

Prices of maize firm in recent months despite the commercialization of newly harvested crops

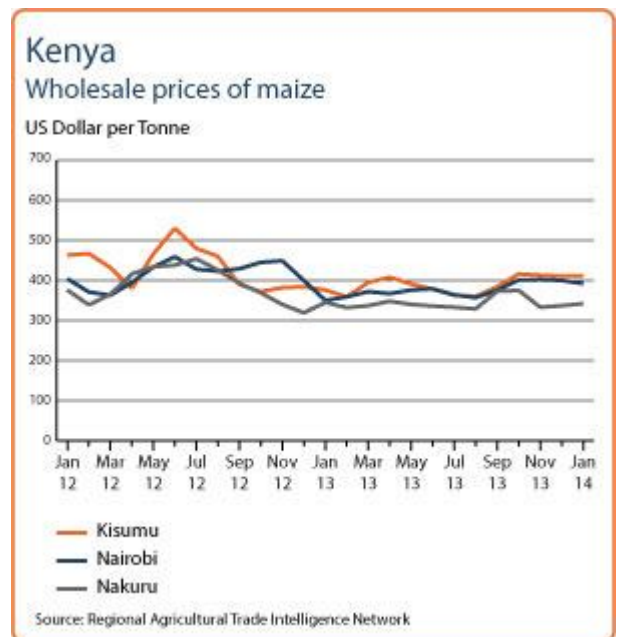
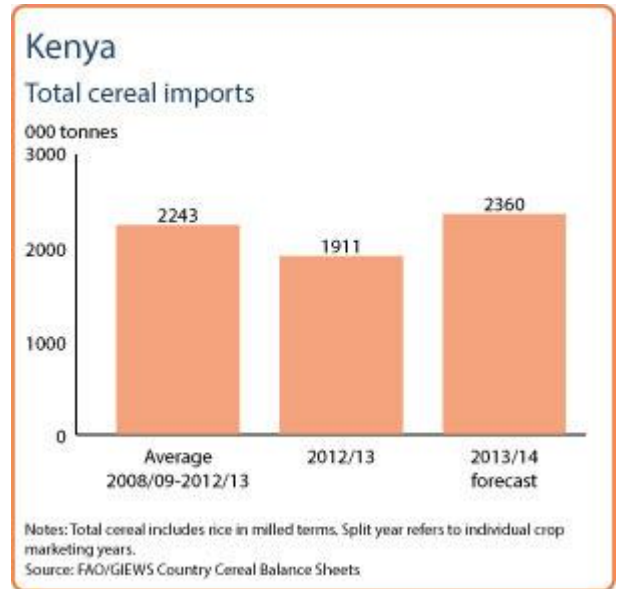
Prices of maize remained steady in recent months despite the commercialization of the newly harvested “long rains” crops and the recent start of the “short rains” harvest. Maize prices in January were between 9 and 12 percent higher than 12 months earlier; however, imports from neighbouring Uganda and Tanzania mitigated the upward pressure on prices of the reduced domestic availabilities.

Food security situation affected by below average “short rains” in parts

In the eastern and coastal marginal agricultural livelihood zones, affected by a reduced “short rains” cereal harvest, poor households will have to rely more on markets for their food requirements, but high cereal prices will prevent them to access adequate food. As a result, they are expected to remain Stressed (IPC Phase 2) through June. After that, as the August to November lean season approaches, some localized areas may fall into Crisis (IPC Phase 3).

In the zones of northern pastoral areas most affected by the erratic short rains, food security deteriorated rapidly after the rains ended in December. These areas include Kaaling, Lapur, and Loima in Turkana County, which are presently in Crisis (IPC Phase 3).

Kenya continues to host the largest number of refugees in the Horn of Africa, with about 482 000 refugees from Somalia as of late January 2014. About 400 000 refugees reside in Dadaab camps in northern Kenya where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people. In addition, as of on 20 January, an estimated 9 950 South Sudanese refugees from Jonglei State have crossed over to Kenya since violence erupted in the neighbouring country in mid-December, and are currently residing in the northwestern area of Kakuma. The daily rate of arrival is as high as 500 and latest reports indicated that the most pressing needs include protection for separated children, registration and health services.



Reference Date: 02-October-2013

FOOD SECURITY SNAPSHOT

- Below average cereal production from the 2013 long-rains season in most cropping areas
- Pasture and water availability declined seasonally in most pastoral areas
- Maize prices increased in September, but are still below last year
- Food security situation remain stable across the country

Land preparation is underway for planting 2013 short-rains season crops, to be harvested by the end of the year. The weather forecast indicates late and erratic rains which don't augur well for crop production.

The 2013 long-rains season cereal production affected by a prolonged dry spell in May/July

In bimodal south-eastern and coastal lowlands, harvesting of 2013 long-rains season (March-to-June) crops has just been completed and coarse grain production (that usually accounts for 30 percent of annual output) is estimated at below average levels. After a positive start, the torrential rains in mid-April that resulted in severe localized floods with loss of infrastructures, crops and livestock were followed by a dry spell from mid-May that significantly impacted on maturing crops. In particular, maize production is expected to be well below average in Makueni, Taita Taveta, Kitui and Nyeri counties. In major unimodal growing areas of Nyanza, Rift Valley and Western provinces, harvesting of 2013 long-rains season (March-to-September) has just started. Significantly lower yields are expected in some areas of Nyanza and Western provinces where a prolonged dry spell from mid-May to early-July affected maize crop at critical development stage.

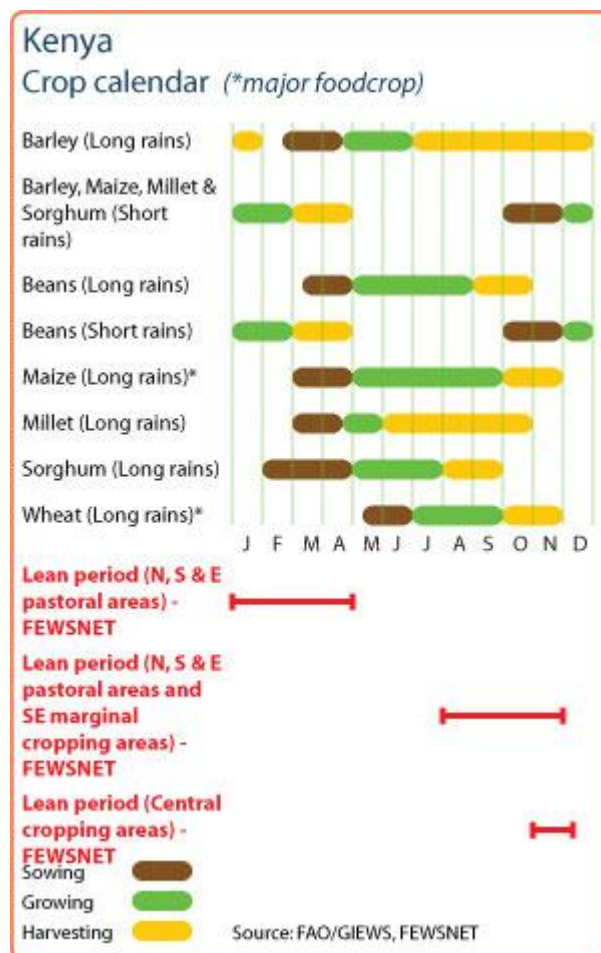
Overall, cereal production in 2013 is forecast to decline by about 17 percent compared to last year, but would remain near the average level of the previous five years.

Late recovery of pasture conditions expected

In eastern and north-eastern pastoral areas, quantity and quality of pasture and water resources have deteriorated since early July due to seasonal dry weather conditions. Grazing conditions are particularly well below average in Kitui, Mbeere and Makueni counties due to the early start of the dry season. In most pastoral areas, the 2013 short-rains season (October-to-December) is forecast at below average levels with an onset of rains delayed by about one month, slowing down the expected recovery in animal body conditions and milk production.

Prices of maize increased in September

Wholesale prices of maize began to increase in September in all monitored markets by between 6 and 13 percent, driven by a below average harvest in some bimodal southern and coastal areas and by concerns over crop performance in major unimodal growing areas of the grain basket. Increasing fuel prices have also provided further support to price increases. Despite the recent increases, however,



Kenya Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	3 050	3 603	3 000	-17
Wheat	356	442	342	-23
Sorghum	130	175	160	-9
Others	203	274	244	-11
Total	3 740	4 494	3 746	-17

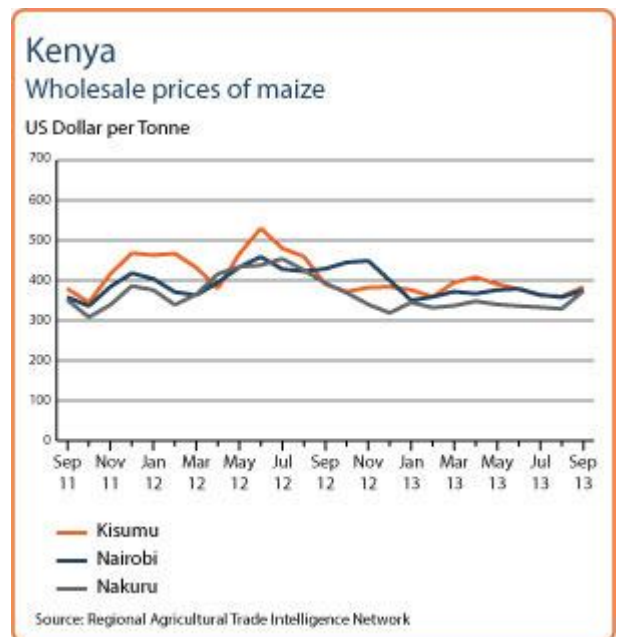
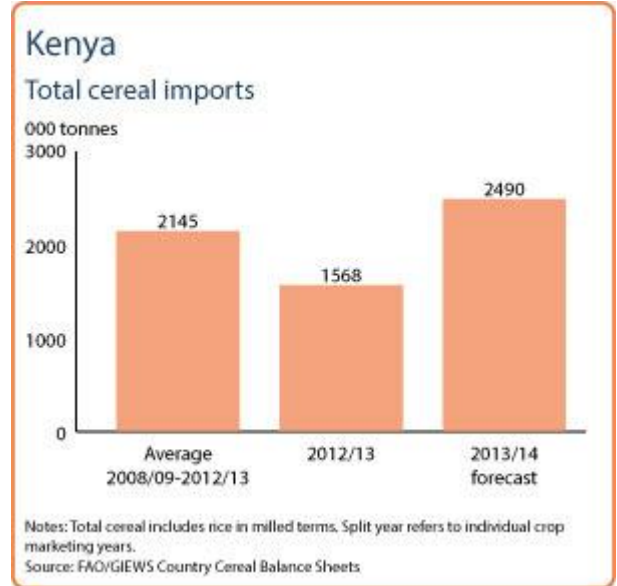
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

prices of maize in September 2013 are still slightly below the levels of a year earlier.

Overall food security remain stable

Despite the erratic rainfall performance, food security conditions are generally stable across the country. Most poor households in south-eastern and coastal agricultural areas as well as eastern and north-eastern pastoral areas remain at “stressed” level (IPC, phase 2) of acute malnutrition. In October, the situation may deteriorate in some areas if the onset of 2013 short-rains will be significantly delayed, affecting milk availability and reducing opportunities for casual labour at planting.

Kenya continues to host the largest number of refugees in the Horn of Africa, with about 472 000 refugees from Somalia as of mid-September 2013. About 400 000 refugees reside in Dadaab camps in northern Kenya where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 28-May-2013

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2013 “long-rains” season crops
- Abundant rains improve pasture and water availability in most pastoral areas
- Since early April, floods have affected about 112 000 people
- Following seasonal trends, maize prices increase in most markets but remain lower than one year ago
- Food security situation improves across the country

Timely and abundant 2013 long-rains benefit crops and grazing resources

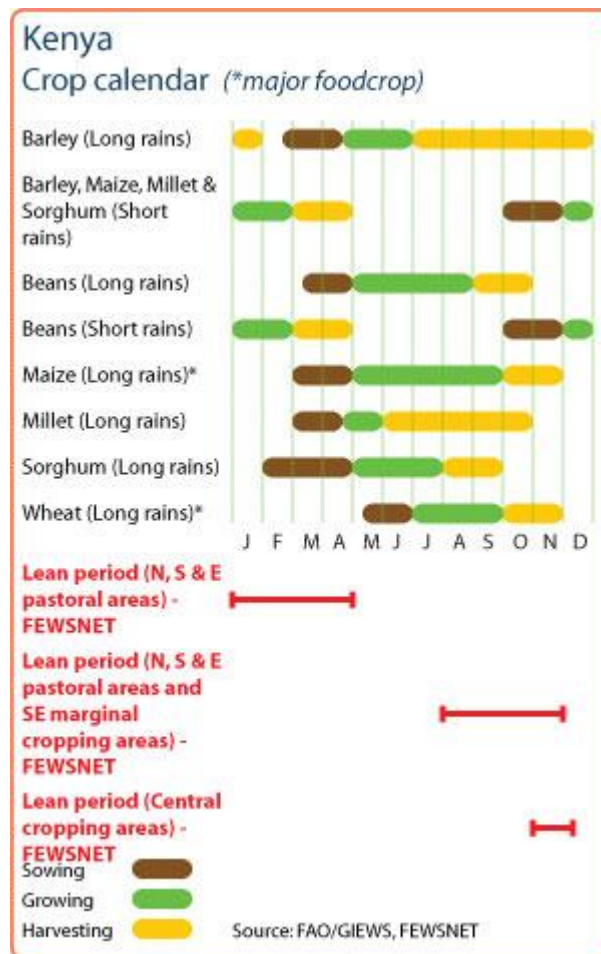
The 2013 long-rains season (March to May) started on-time during the second and third weeks of March and rainfall amounts have been average to above average in most areas of the country. Planting has just been concluded with some delay due to a shortage of seeds and fertilizers supplied by the National Cereals and Produce Board (NCPB) following financial constraints. Despite the generalized increase in the costs of operating farm machinery due to high fuel prices, the favourable start of the rainy season has often induced farmers, especially in south-east areas, to increase planted area.

In bimodal southern and coastal lowlands, where harvesting is expected to start in July, crops are currently in good conditions and production (that usually accounts for 30 percent of annual output) is expected to be above average. In major growing areas of Nyanza, Rift Valley and Western provinces, production prospects are also favourable due to recent beneficial rainfall but will still depend on performance of rains in the coming months, until next September. By the second dekad of May, a suspected outbreak of the virus “Maize Lethal Necrosis Disease” that caused significant losses last year has been reported in Narok and Kakamega districts in the Rift Valley and its development needs to be carefully monitored.

Abundant long-rains have also regenerated pasture and replenished water catchments in northern, eastern and north-eastern pastoral areas, with positive effects on livestock body conditions and milk production. However, torrential precipitations since early April have caused severe flooding across the country, destroying infrastructures, washing away crops and displacing about 112 000 people, mainly located in south-eastern areas, around the Lake Victoria, along the Tana river and in Marsabit and Wajir districts.

Despite some increase, current maize prices remain lower than last year

Between February and May, following seasonal trends, wholesale prices of maize slightly increased in most markets of the Rift Valley (Eldoret, Kisumu and Nakuru) as supplies from recently harvested short-rains crops were gradually dwindling. Recent heavy rains in several parts of the country have severely affected road network, disrupting access to markets and the regular supply of crops. During the last three months, maize prices remained mostly stable in the capital Nairobi, partly due to the release of about 40 000 tonnes of



Kenya Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Maize	2 915	3 377	3 603	7
Wheat	332	268	442	65
Sorghum	125	160	175	9
Others	195	254	241	-5
Total	3 567	4 059	4 461	10

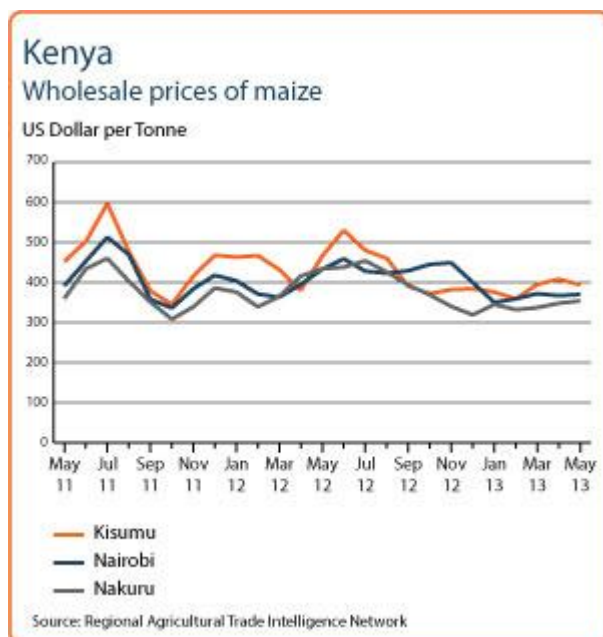
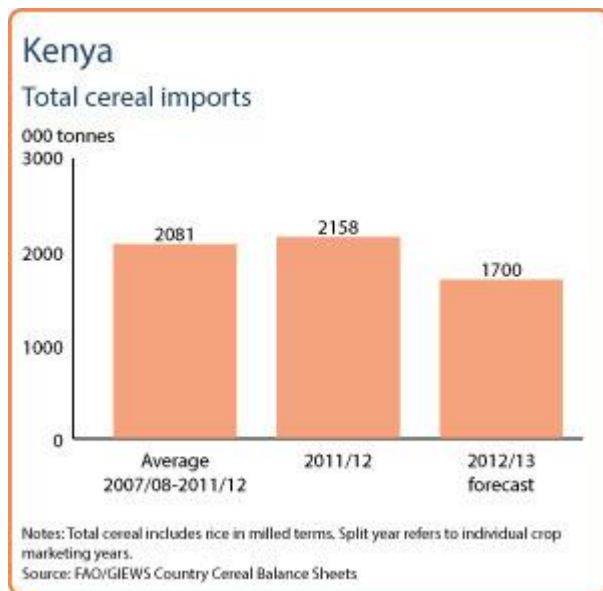
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

maize from public stocks to curb food price inflation. Prices of maize in May 2013 are between 8 and 18 percent lower than in May 2012.

Food security improves across the country

The number of people in need of humanitarian assistance decreased between August 2012 and February 2013 from 2.1 to 1.1 million people, mainly due to two consecutive favourable rainy seasons in most areas of the country. The situation has continued to improve following the positive performance of the ongoing long-rainy season and its impact on crops (with early availability of green products) and livestock (with better milk production). Increased opportunities of casual labour in agriculture (especially weeding and harvesting), due to general expansion in planted area, will further support food consumption in the coming weeks before the start of the harvest by providing cash income and improving households' purchasing power. Higher levels of malnutrition are nevertheless reported in some coastal marginal agricultural areas that received below average rains and in some pastoral areas affected by floods.

The country continues to host the largest number of refugees in the Horn of Africa, with over 492 000 refugees from Somalia as of mid-May 2013. About 400 000 refugees currently reside in Dadaab camps in northern Kenya where access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 12-February-2013

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2012/13 “short-rains” season crops
- Maize prices decline in most markets
- Food security situation expected to worsen in south-eastern and coastal marginal cropping areas

Below average production expected from the 2012/13 short-rains season crops

In bimodal south-eastern and coastal marginal agricultural areas, harvesting of 2012/13 short-rains season crops is about to start and production is expected at well below average levels. The October to December “short-rains” season has performed poorly with below average and uneven temporal and spatial distribution, especially in Mwingi, Kitui, Makueni and Taita Taveta districts. A series of dry spells also caused poor germination, increasing replanting needs (up to three times) and leading to wilting and drying out of crops. In some areas, rains resumed at mid-December and continued off-season in early January with some positive impact on yields of wilted crops and grazing resources. Few farmers decided to re-plant at the end of 2012 and currently crops are being harvested for green consumption. Late and off-season rains have also improved livestock body conditions that were very poor. The “short-rain” season cereal harvest normally accounts for about 20-25 percent of the total annual production.

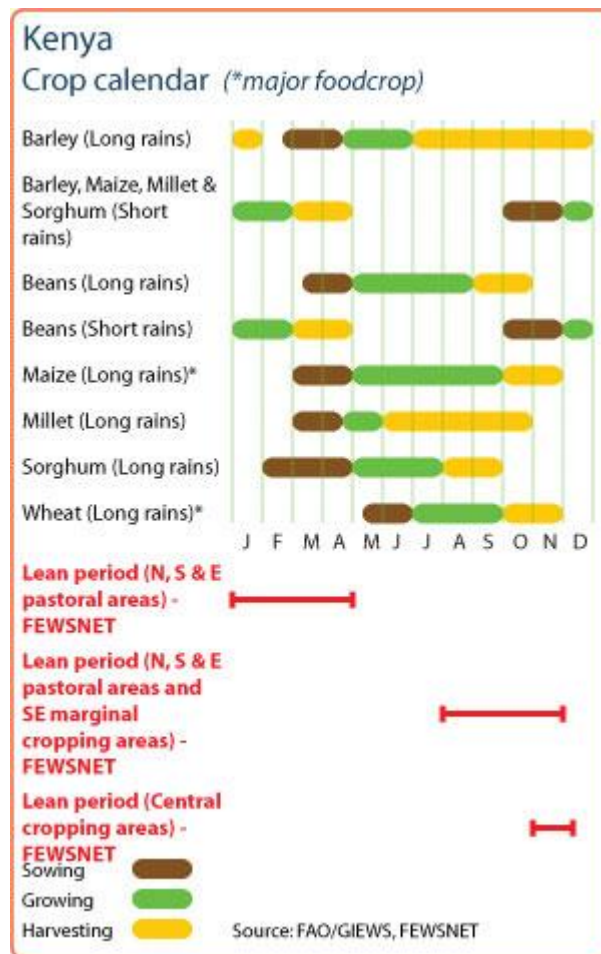
Overall, the 2012/13 cereal production is estimated at about 3.2 million tonnes, about 15 percent below the previous year and 8 percent below the last five years average. Accordingly, cereal import requirements for 2012/13 marketing year (July/June) are forecast at about of 2.28 million tonnes, including one million tonnes of maize, 800 000 tonnes of wheat and 400 000 tonnes of rice. At this level, the import forecast is slightly lower than last year’s high level, but 8 percent above the average of the previous five years.

2013 long-rains forecast at average to below average levels

Planting of the 2013 “long-rains” season crops is about to start in major growing areas of Central, Rift Valley and Western provinces. Meteorological forecasts for the 2013 March to May rainy season point to an average to below average rainfall levels. In addition, concerns are raised about a possible scaling down of maize planting in parts on account of the presidential elections that are scheduled to take place in March 2013.

Maize prices decline in most markets and remain lower than last year

Prices of maize, after having seasonally peaked in June/July, began to decline as the 2012 “long-rains” harvest became available from August. In Eldoret and Nakuru markets, located in the major producing area of the Rift Valley, wholesale maize prices have declined by 25 and 30 percent between July and December, respectively. Prices levelled or slightly increased in January 2013, as the harvest neared its completion. Compared to January 2012, prices in January 2013 were 8



Kenya Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Maize	2,812	3,100	2,600	-16
Wheat	329	256	250	-2
Sorghum	133	200	175	-12
Others	157	153	138	-10
Total	3,431	3,709	3,163	-15

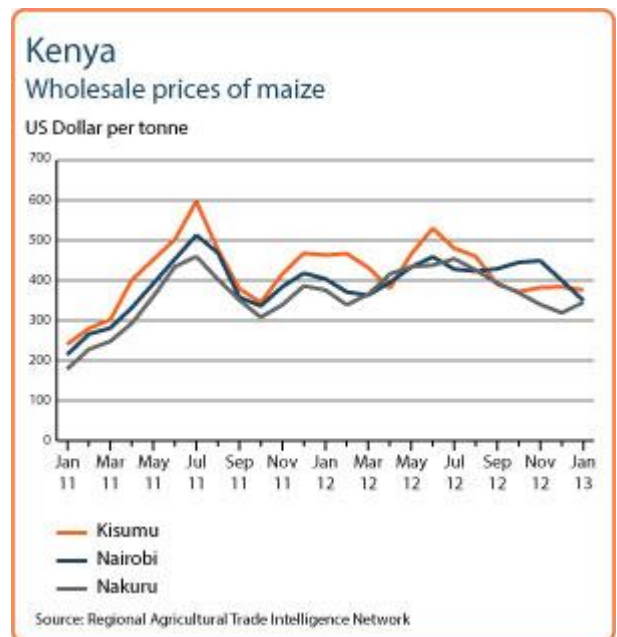
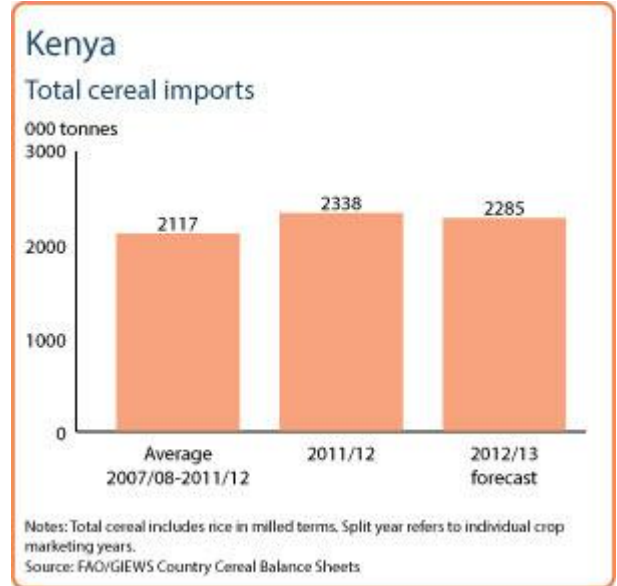
Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

percent lower in Nakuru and 16 percent lower in Eldoret. In the capital Nairobi, prices have been declining since November 2012 (-22 percent between November and January) and in January 2013 are 13 percent below their levels of 12 months earlier. Maize prices are stable or even increasing in some south-eastern and coastal areas that experienced a poor 2012/13 short-rainy season.

Food security expected to worsen in parts

The number of people in need of humanitarian assistance is estimated at about 2.1 million. The poor performance of the 2012/13 short-rains season in south-eastern and coastal zones may result in an upward revision of this number as food stocks are expected to be only partially replenished and may quickly be depleted. In addition, opportunities of casual labour in agriculture (especially weeding and harvesting) have been particularly scarce, significantly limiting households' food access.

As of mid-January 2013, according to UNHCR and OCHA, about 550 000 refugees, mostly from Somalia, were hosted in Dadaab and Kakuma camps in northern Kenya and access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 10-October-2012

FOOD SECURITY SNAPSHOT

- Unfavourable weather conditions affect the 2012 long-rains season maize crop
- Maize prices began to decline following the start of harvest
- Food security situation generally improves, but concern remains in pastoral and marginal cropping areas

Below average maize production expected from the 2012 long-rains season

In major cropping areas of the Rift valley, Western and Nyanza provinces, harvesting of the 2012 long-rains cereal crops has just started and will continue until the first months of 2013. A below average crop is expected following late and erratic rains in Nyanza, parts of western and southern Rift Valley and parts of Central and Eastern provinces. The outbreak of the highly contagious Maize Lethal Necrosis Disease (MLND) in some districts of southern Rift Valley and Nyanza provinces has affected about 60 000 hectares where production may drop by 60-80 percent.

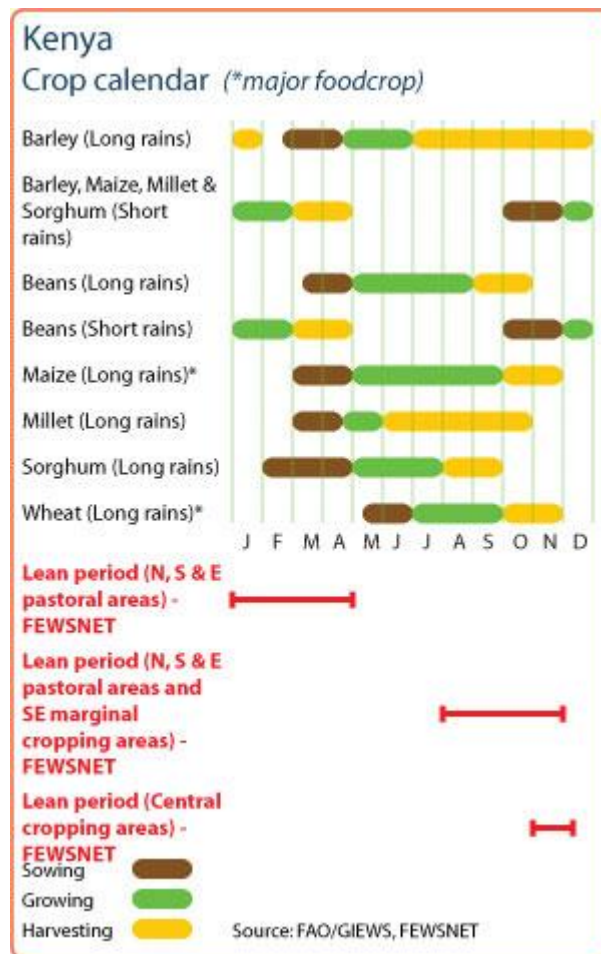
In bimodal south-eastern and coastal marginal agricultural areas, harvesting of the 2012 long-rains cereal crops is almost complete and production is estimated at below average levels as rains have been erratic and ended earlier than usual. Major soil moisture deficits were reported in Taita Taveta, Kitui, Mwingi, Meru and Makueni districts, where the rainy season has been extremely poor leading to a complete crop failure in some areas. A poor long-rains season has also characterized some northern and north-eastern pastoral areas including Mandera, Wajir, Isiolo, central Garissa and Tana River, where water resources have been only partially recharged, pasture conditions declined and livestock trekking distances increased. In other pastoral areas that received adequate rainfall, pasture availability is good and livestock productivity has significantly improved.

On the other hand, planting of the 2012 short-rains season crops has just started in eastern and coastal areas. Enhanced precipitations are forecast until the end of the year (especially in the eastern half of the country) which is expected to have a positive impact on crop yields and pasture conditions. However, concern over localized flooding is raised in some areas and may result in increased post-harvest losses and outbreak of water-borne diseases.

Overall, the 2012/13 cereal production, even assuming an above average output for short-rains crops to be harvested in March/April 2013, is forecast at 3 million tonnes, about 10 percent below last five years average. Cereal import requirements for 2012/13 marketing year (July/June) are forecast at a high of 2.3 million tonnes (about 15 percent up on last year), including 1.2 million tonnes of maize, 600 000 tonnes of wheat and 400 000 tonnes of rice.

Maize prices decline in most markets, but generally remain high

Prices of maize peaked seasonally in June/July and began to decline



Kenya Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	2,722	2,650	2,400	-9
Wheat	319	205	330	61
Sorghum	133	200	175	-12
Others	157	153	130	-15
Total	3,331	3,208	3,035	-5

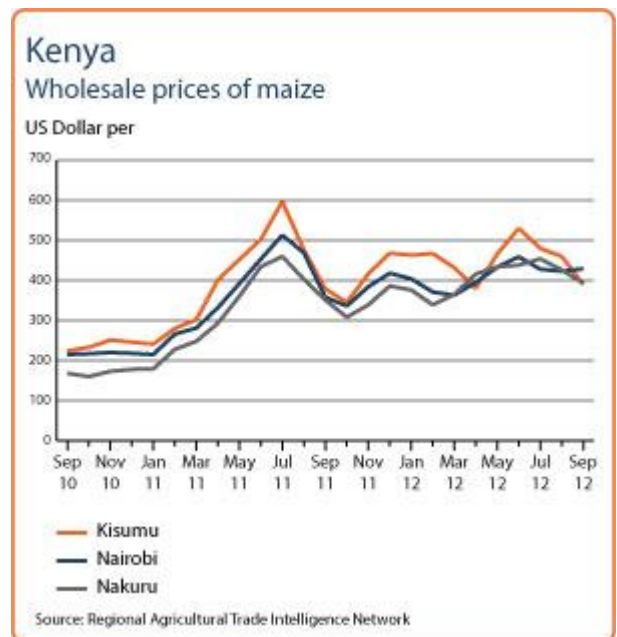
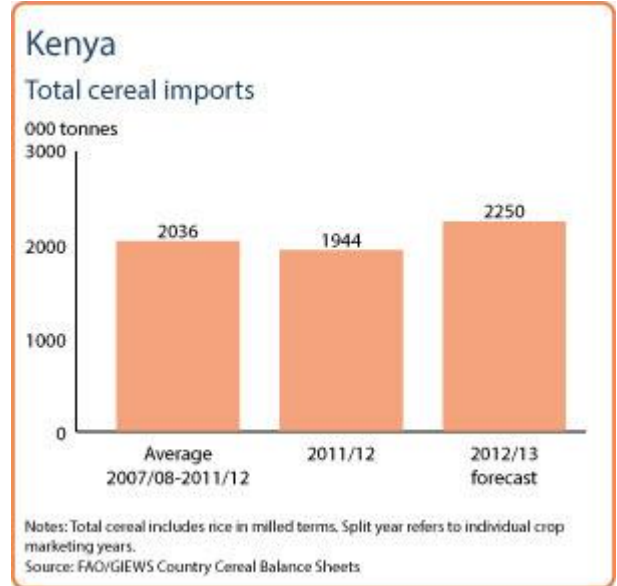
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

following the start of the 2012 “long-rains” harvest. In main markets, maize prices in September were between 7 and 25 lower than the seasonal peak in June/July. Although maize prices remain particularly high across most pastoral areas, livestock-to-maize terms of trade are relatively favourable for pastoralists. Compared to a year earlier, current maize prices are still between 5 and 20 percent higher, due to the strong local demand coupled with the expectations of a below average seasonal production.

Overall food security improves but concerns remain in pastoral and marginal cropping areas

Currently the number of people in need of humanitarian assistance is estimated at about 2.1 million, about 43 percent less than in August 2012, following the start of harvesting of 2012 long-rains crops and improved market supplies. Most food insecure areas are located in north-eastern and north-western pastoral districts and in south-east and coastal marginal cropping areas, including Wajir, Mandera, Moyale, Marsabit, Turkana, Mwingi and Tana River districts. Here, food security of most vulnerable households has been seriously affected by low cereal production, low milk productivity, high food prices as well as inter-communal conflicts between herders and farmers (in particular among about 13 000 displaced people in Tana River district). Food security conditions are expected to improve soon in northern pastoral areas as the short-rains season, starting in October, is expected to bring some relief to depleted grazing resources. Conversely, food security in south-eastern and coastal lowlands is expected to deteriorate until March 2013 when the next harvest will take place.

As of end of September 2012, according to UNHCR and OCHA, about 473 000 refugees, mostly from Somalia, were hosted in Dadaab camps in Garissa district and access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 16-July-2012

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2012 crop output in south-eastern and coastal areas
- High prices of maize in most markets
- Food security situation expected to deteriorate in pastoral districts and south-eastern and coastal areas.

Late and erratic rains affected crops in south-eastern and coastal areas

In most cropping areas, the 2012 long-rains season (March to June) has started in April, with a delay of about 2 to 4 weeks. In bimodal south-eastern and coastal marginal agricultural areas, where harvesting is expected to begin in August, crop production is forecast to be below average as rains have been erratic during the season and ended in May about 3-4 weeks earlier than usual. In these areas, the August harvest usually accounts for 30 percent of annual output. Major soil moisture deficits have been reported in Taita Taveta, Kitui, Mwingi, Meru and Makueni districts, where the rainy season has been extremely poor leading to a complete crop failure in some areas.

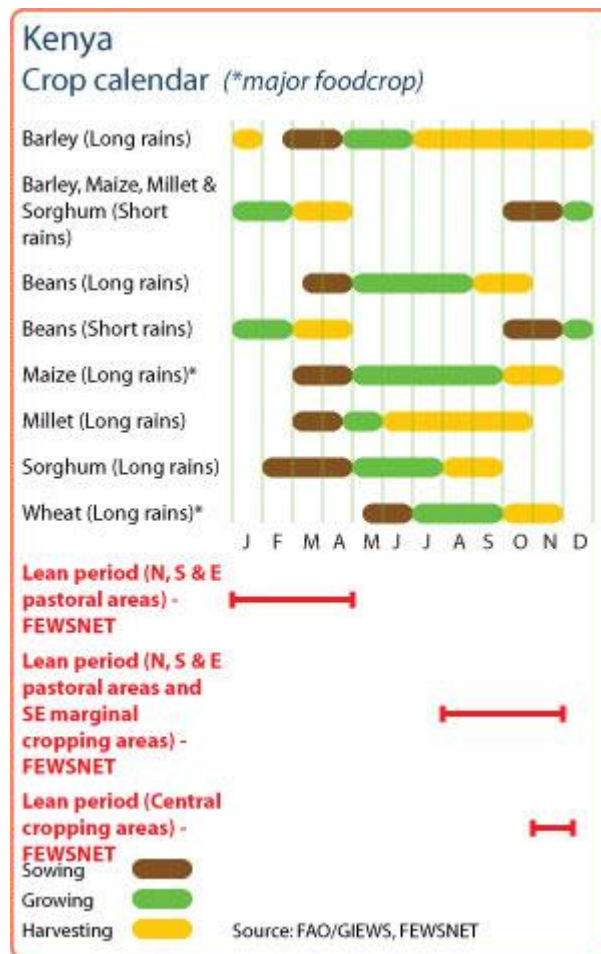
A late start and an early cessation have also characterized the long-rains season in some northern and north-eastern pastoral areas including eastern Marsabit, northern Isiolo, central Garissa, Tana River and southern Ijara where pasture conditions are below average and water resources have been only partially recharged. In other pastoral areas that received adequate rainfall, pasture availability is good and livestock productivity has significantly improved.

In the major cropping areas of the Rift valley, Western and Nyanza provinces, harvesting of the 2012 long-rains cereal crops is expected to begin in early October through December and crop prospects are generally favourable following abundant rains in April/May. However, the outbreak of the highly contagious Maize Lethal Necrosis Disease in southern Rift Valley province is raising some concern as so far nearly 300 000 farmers with slightly more than 15 000 hectares (almost 1.4 percent of total planted area) were affected.

Overall, the early forecast of the 2012 maize production (assuming an average output for next short-rains crops to be harvested in March/April 2013) is put at an average level of 2.7 million tonnes. Cereal import requirements for 2012/13 marketing year (July/June) are forecast at a high of 2.5 million tonnes (about 15 percent up on last year), including 1.15 million tonnes of maize, 900 000 tonnes of wheat and 400 000 tonnes of rice.

Maize prices on the rise in most markets

Maize prices have generally increased during the last three/four months by an average of 20-25 percent in main wholesale markets. In June 2012, maize was traded in Nairobi markets at USD 460, similar to the level of one year earlier, while in Kisumu, the second largest urban area after the capital city Nairobi, prices have reached the near record level of USD 570 per tonne due to the strong local demand. Maize prices are expected to remain high until August when the newly harvested crops



Kenya Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	2 722	2 650	2 700	2
Wheat	319	205	225	10
Sorghum	133	200	200	0
Others	157	153	158	3
Total	3 331	3 208	3 283	2

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

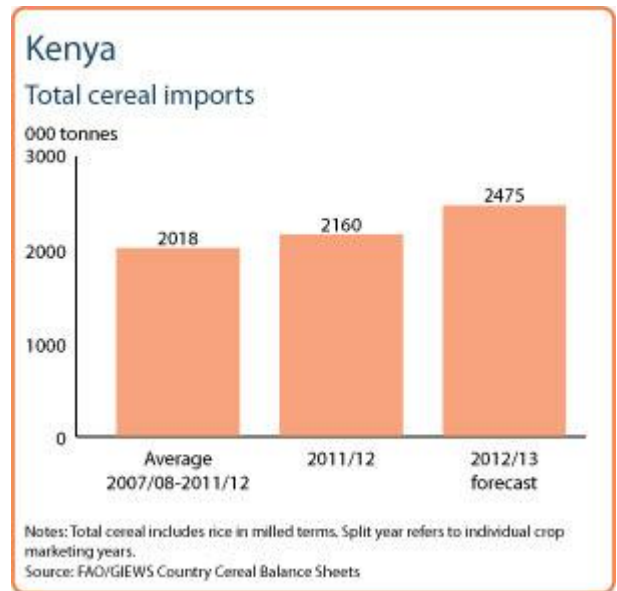
enter the market.

Conversely, maize prices are stable or declining in pastoral areas. This trend is likely due to the low demand for maize following the good local availability of milk and the impact of humanitarian assistance through food aid distribution and food/cash-for-assets programs.

The number of people in need of humanitarian assistance likely to increase by August

Currently the number of people in need of humanitarian assistance is estimated at about 2.2 million. Most of the highly food insecure households are located in north-eastern and north-western pastoral districts and in south-east and coastal marginal cropping areas, including Wajir, Mandera, Moyale, Marsabit, Turkana, Mwingi and Tana River districts. Food security conditions are expected to deteriorate by September in some areas of south-eastern and coastal districts whose crops have been seriously affected by unfavourable weather conditions during the 2012 long-rains season and output is likely to be well below average. In northern pastoral areas, as the dry season has already entered, food security conditions will gradually deteriorate until November when the short rainy season is expected to bring some relief to depleted grazing resources.

According to UNHCR and OCHA, about 532 000 refugees, mostly from Somalia, are hosted in camps in Garissa district and access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 27-March-2012

FOOD SECURITY SNAPSHOT

- Above-average production estimated for 2011/12 “short-rains” maize crop
- Prices of maize decline in main markets following good supply
- Food security situation improves across the country

Favourable outturn of the 2011/12 “short-rains” maize crop

Harvesting of the 2011/12 “short-rains” crops is underway in Eastern Province and parts of Coast Province. Maize production is estimated at an above average 450 000 tonnes. In general, the 2011/12 short rains season has been favourable, with an early start of rains in mid-October and above average in most areas. The final output was expected to be even higher, but the early cessation of rains by almost one month, especially in southeast marginal agricultural zones, had negatively impacted on yields of late-planted crops and led to a downward revision of earlier production forecast.

Aggregate cereal production for 2011/12 is provisionally put at about 3.3 million tonnes, slightly below last five years average and 14 percent less than previous year’s good output. Cereal import requirements for 2011/12 marketing year (July/June) are forecast at 2.1 million tonnes (about 26 percent up on last year), including 860 000 tonnes of maize, 830 000 tonnes of wheat and 400 000 tonnes of rice.

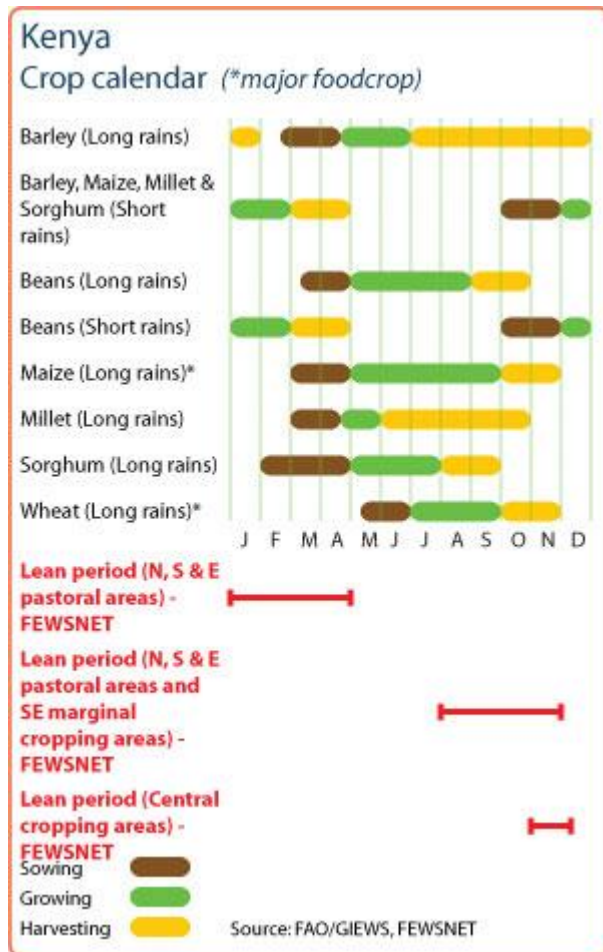
Maize prices decline, but remain above average

Maize prices have generally declined since December 2011 following the increasing supply in most markets. In March 2012, maize was traded in wholesale markets of Nairobi at USD 360 per tonne compared to about USD 420 in December 2011. However, current maize prices are still between 30 and 50 percent above the level of one year earlier.

Substantial reduction in the number of people in need of humanitarian assistance

Food security situation in drought-affected areas has improved since the beginning of the “short-rains” season in October 2011. The positive early onset of rains immediately brought some relief to northern and north-eastern pastoral areas, improving water and pasture conditions, reducing trekking distances and increasing milk production. Livestock body conditions are reported to be generally good and pasture is expected to last for the next 3-4 months. In most “short-rains” dependant areas, household food security started to improve with harvesting of short cycle crops from November 2011.

The number of people in need of humanitarian assistance has been revised down from 3.7 million to 2.2 million. Most of the highly food insecure households are located in some areas of northeastern and northwestern pastoral districts including Wajir, Mandera, Moyale, Marsabit, Turkana, Mwingi and Tana River. In south-east and coastal marginal agricultural areas, households that gathered below average short-rain season harvests are likely to revert to previous food insecurity levels as food stocks are expected to run out in April, about



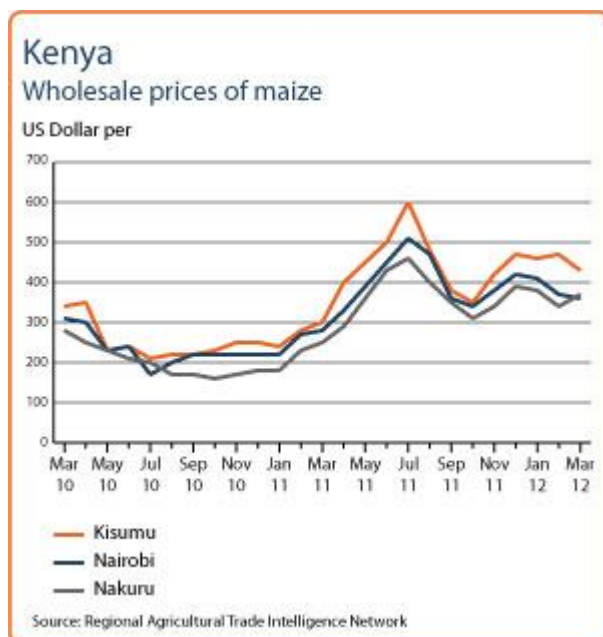
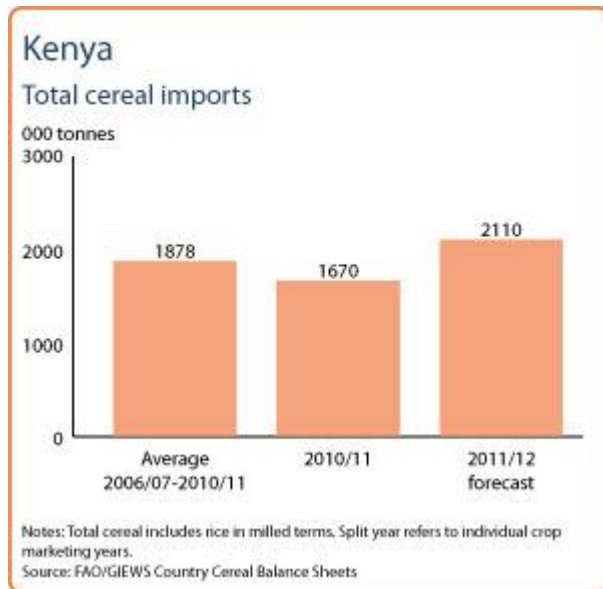
Kenya Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Maize	2 841	3 222	2 700	-16
Wheat	292	252	205	-19
Sorghum	119	164	210	28
Others	174	172	153	-11
Total	3 426	3 810	3 268	-14

Note: percentage change calculated from unrounded data.
 Source: FAO/GIEWS Country Cereal Balance Sheets

two months earlier than usual.

According to UNHCR and OCHA, the total number of refugees hosted in camps in Garissa district is at a record level of 598 000 people, mostly from Somalia, and access to basic necessities such as food, shelter, water and sanitation is often precarious due to the high concentration of people.



Reference Date: 10-January-2012

FOOD SECURITY SNAPSHOT

- Above-average production forecast for 2011/12 “short-rains” maize crop
- Improved food security situation observed in drought-hit northern agro-pastoralist areas and in marginal cropping lowlands
- Price of maize show an unusual increase in main markets following heavy rains

Favourable outturn of the 2011/12 “short-rains” maize crop

Harvesting of the 2011/12 “short-rains” crops is expected to start at the beginning of March and maize production is forecast at an above average 580 000 tonnes. The “short-rains” season started in mid-October, about three weeks earlier than normal. Abundant and evenly distributed rains were received in most areas, improving soil moisture and benefitting crops and pasture. However, at the end of November, excessive rains have resulted in localised flash floods in northern districts of Garissa, Wajir, western Kenya, Nairobi and Isiolo, and in some areas of southern coastal districts. About 100 000 people have been displaced and damages to infrastructure and losses to crops and livestock were reported. The heavy rains also coincided with the final stage of the “long-rains” crops harvesting in parts of Rift Valley, reducing grains quality.

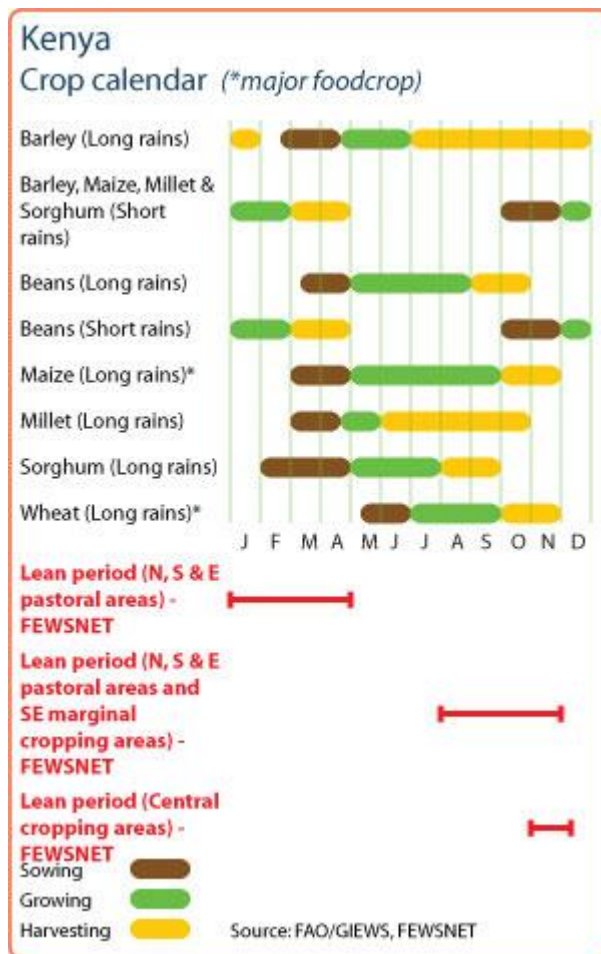
Aggregate cereal production for 2011/12 is provisionally put at 3.4 million tonnes, slightly above the last five years average. Cereal import requirements for 2011/12 marketing year (July/June) are forecast at 2 million tonnes (about 22 percent up on last year), including 830 000 tonnes of wheat, 760 000 tonnes of maize and 400 000 tonnes of rice.

Unseasonable increase in maize prices due to heavy rains

Following the record levels in most markets in July 2011, price of the main staple maize has sharply declined until last October. The supply of the newly harvested crops, cross-border inflows and sales of relief food in pastoral areas have all contributed to the decline. However, prices increased unseasonably in the last months of 2011 due to heavy rains and localized floods, which delayed harvests in the main producing areas of the Rift valley and disrupted marketing operations of the already harvested crops. Increases of 24 percent in Nairobi and 29 percent in Mombasa were recorded between October to December. Currently, maize prices are well above their levels of the previous year in all monitored markets. In December 2011, at about USD 400 dollars per tonne, maize prices in Nairobi and Mombasa were almost twice their levels of the previous year.

Improved food security situation in pastoral areas and southern cropping areas

Food security situation in drought-affected areas has improved since the beginning of the 2011 short-rains season in October. The positive early onset of rains immediately brought some relief to northern and



Kenya
Cereal production

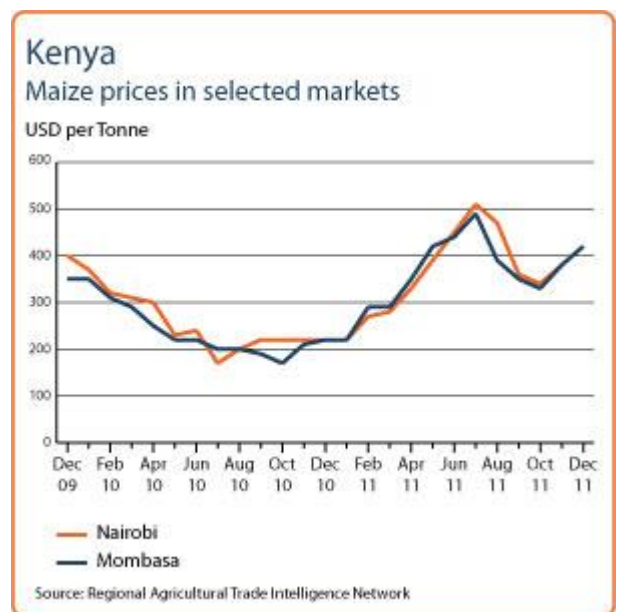
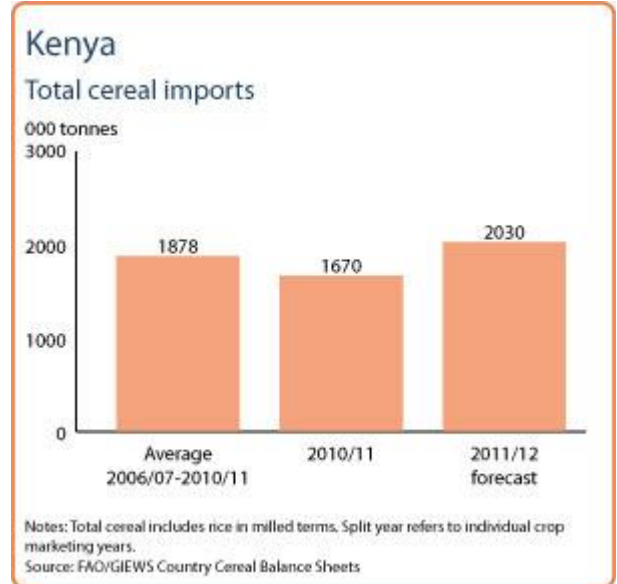
	2006-2010	2010	2011	change
	average		estimate	2011/2010
	000 tonnes		percent	
Maize	2 777	2 900	2 850	-2
Wheat	283	252	230	-9
Sorghum	130	220	210	-5
Others	169	148	143	-3
Total	3 359	3 520	3 433	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

north-eastern pastoral areas, improving water and pasture conditions and reducing trekking distances. In south-eastern and coastal cropping areas, household food security has also improved since November with harvesting of short-cycle crops, including vegetables and legumes. Further improvements are expected during the first quarter of 2012 with harvesting of "short-rains" crops that represent about 70 percent of annual production in these areas.

The number of people in need of humanitarian assistance is currently estimated at 3.75 million, more than double the levels in January 2011. Most of the highly food insecure households are in agro-pastoralist areas in northern and north-eastern districts that experienced the negative effects of two to three consecutive dry weather seasons. In these areas, livestock losses due to the prolonged drought (and the recent floods in some areas) are estimated at about 8 million animals.

The drought-induced flux of Somali refugees into Kenya has significantly declined in the last few months. According to UNHCR data, the total number of hosted refugees in several camps in Garissa district has reached the unprecedented figure of 520 000 people, with limited access to basic needs such as food, shelter, water and sanitation, and increasing risks for proliferation of diseases.



Reference Date: 03-November-2011

FOOD SECURITY SNAPSHOT

- Low production estimates for 2011 long-rains cereal output in marginal agricultural areas and coastal lowlands
- Food insecurity likely to improve in northern agro-pastoralist areas and in marginal cropping lowlands in coming months following favourable rains
- Sharp decline in maize prices from last July's record levels improving food access for poor households

Aggregate maize production decline in 2011 compared to last year

Harvesting of 2011 "long-rains" season maize crop is complete in south Rift Valley, Nyanza and parts of Western provinces, while it is underway in the main growing areas of north Rift Valley and Western provinces and will continue through January. The seasonal maize production is officially estimated at 2.25 million tonnes, about 18 percent below last year good output due to dry weather conditions. The 2011 "short-rains" season started in mid-October, two-three weeks earlier than normal, and is likely to be abundant in most areas improving soil moisture and benefitting crops and livestock. During the second half of October, some flash floods have been reported in northern districts of Garissa, Wajir, Mandera, Marsabit and Moyale, and in some areas of southern coastal districts.

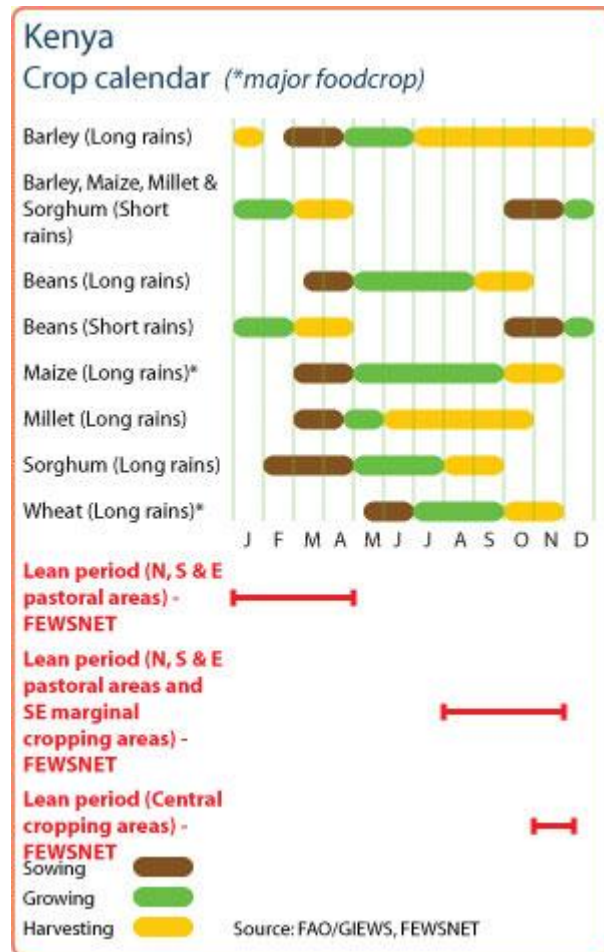
Aggregate cereal production for 2011 (assuming a favourable performance of short rains for the remaining of the season leading to an above-average production to be harvested in March/April 2012) is put at about 3.3 million tonnes, similar to last five years average. Cereal import requirements for 2011/12 marketing year (July/June) are forecast at 2.3 million tonnes (about 37 percent up on last year), including one million tonnes of maize, 830 000 tonnes of wheat and 400 000 tonnes of rice.

Maize prices declining but still at high levels

Prices of the main staple maize, which increased sharply in the first semester of 2011 reaching record levels in most markets during July, declined in all monitored markets (up to 42 percent from July to October) as a result of the newly harvested crops supplying markets, cross-border inflows and sales of relief food in pastoral areas. Nevertheless, in October 2011, in main wholesale markets of Nairobi and Mombasa, maize was traded at about USD 330 per tonne, respectively still 54 and 92 percent higher than one year before. Further reductions in cereal prices are expected until March 2012 due to the favourable prospects for the production of the 2011 "short-rains" season crops.

Favourable short rains expected to improve food security in pastoral and southern cropping areas

The number of people in need of humanitarian assistance is currently estimated at 3.75 million, more than double the levels in January 2011. Most of the highly food insecure households are in agro-pastoralist areas in northern and north-eastern districts that experienced the



Kenya Cereal production

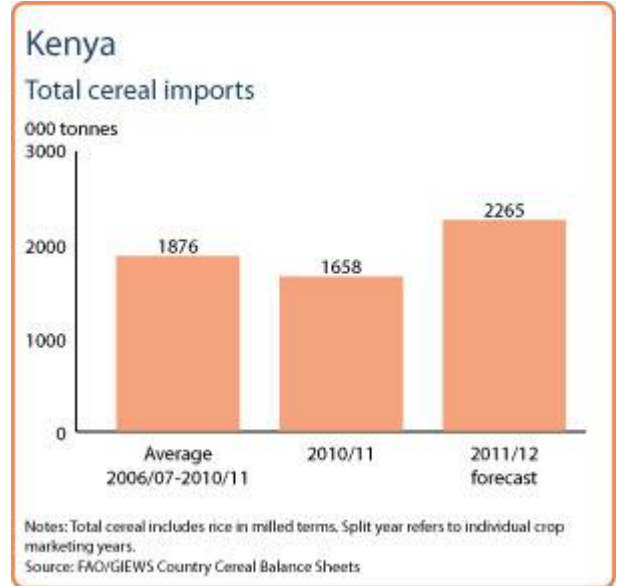
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	2 777	2 900	2 700	-7
Wheat	283	252	230	-9
Sorghum	130	220	190	-14
Others	169	148	143	-3
Total	3 359	3 520	3 263	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

negative effects of two to three consecutive dry weather seasons. In these areas, livestock losses due to the prolonged drought (and the recent floods in some areas) are estimated at about 8 million animals.

Food security situation in drought-affected areas is expected to improve during the 2011 short-rains season (October-December). The positive early onset of rains is already bringing some relief to northern and north-eastern pastoral areas, improving water and pasture conditions and reducing trekking distances. In south-eastern and coastal cropping areas, household food security is expected to slightly improve from November with harvesting of short-cycle crops, including vegetables and legumes. Further improvements are expected during the first quarter of 2012 with harvesting of "short-rains" crops that represent about 70 percent of annual production in these areas.

The drought-induced flux of Somali refugees into Kenya has significantly declined in recent weeks. However, according to UNHCR data, the total number of hosted refugees in several camps in Garissa district has reached the unprecedented figure of about 520 000 people, with limited access to basic needs such as food, shelter, water and sanitation, and increasing risks for proliferation of diseases. Recent floods affected parts of Dadaab camps, hampering aid delivery and increasing risk of waterborne diseases outbreaks.



Reference Date: 05-August-2011

FOOD SECURITY SNAPSHOT

- Worsening food insecurity in eastern and northern pastoralist and agro-pastoralist areas and in marginal cropping lowlands
- Maize prices reach record levels, with declining terms of trade for pastoralists
- Poor prospects for 2011 long-rains cereal output in marginal agricultural areas, but improving conditions for crops in major growing areas in the west

Food security crisis deepening in pastoral and marginal agricultural areas

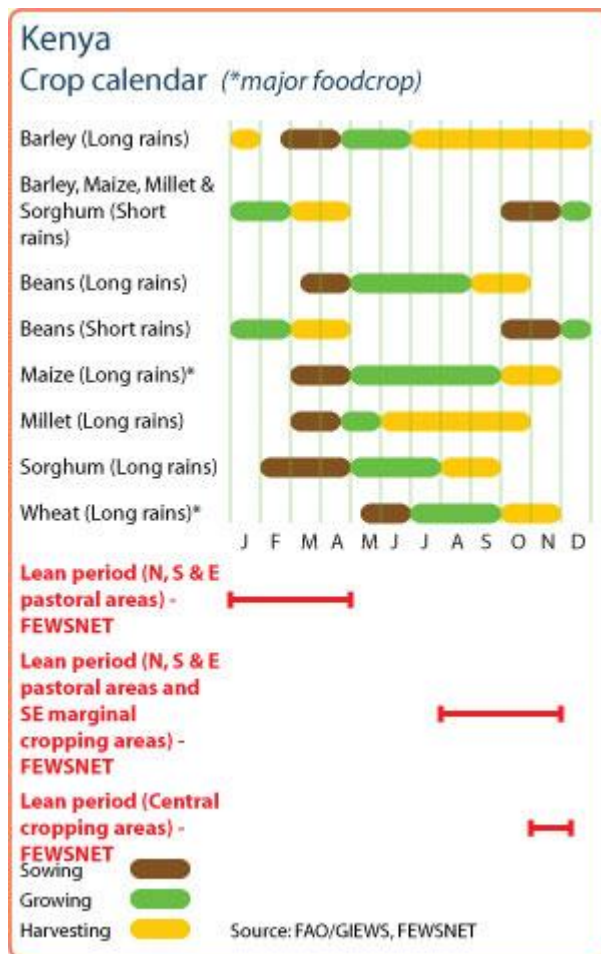
The number of people in need of humanitarian assistance is currently estimated at 3.5 million, more than double the levels in January 2011. Most of the highly food insecure are in pastoralists and agro-pastoralists areas in northern and eastern provinces as well as in south-eastern marginal agricultural areas. Worsening livestock body conditions coupled with rising maize prices have caused a substantial deterioration in the terms of trade for pastoralists, limiting their access to food.

The food security conditions are expected to deteriorate in pastoral areas of Turkana, Moyale, Marsabit, Mandera, northern Isiolo, eastern Samburu, southern Kajiado and Wajir districts and in marginal cropping lowlands of Mwingi, Kitui, Garissa and Tana River districts. The delivery of timely and significant emergency assistance is very much required to stem the worsening humanitarian crisis expected to continue at least the start of the 2011 short-rains from October in pastoralist areas and up to February 2012 in marginal agricultural areas with the beginning of the next harvest.

The influx of Somali refugees into Dadaab, Ifo and Dagahaley camps in Garissa district continues at a rate of approximately 1 400 people per day. The size of refugee population has reached an unprecedented figure of 476 000 people, with limited access to basic needs such as food, shelter, water and sanitation, and increasing risks for proliferation of diseases.

Maize prices hit record high levels

Prices of the main staple maize continued their upward trend which began last February and in July 2011 were at record levels in most markets. The high prices followed the reduced 2010/11 secondary season harvest and concerns over the performance of the incoming 2011 main season harvest, together with increasing fuel prices. The cereal export ban in the United Republic of Tanzania has also added to the pressure. In July 2011, in Nairobi and Mombasa wholesale markets, maize was traded between USD 510 and USD 495 per tonne respectively. This is an increase of about 150-200 percent over the last 12 months. In one month alone, between June 2011 and July 2011, the increase was an average of 8-12 percent in most markets, with peaks of 20 to 30 percent in deficit areas such as Eldoret and Kisimu.



Kenya Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	2 757	2 800	2 500	-11
Wheat	283	252	200	-21
Sorghum	130	220	150	-32
Others	204	284	209	-26
Total	3 341	3 431	2 999	-13

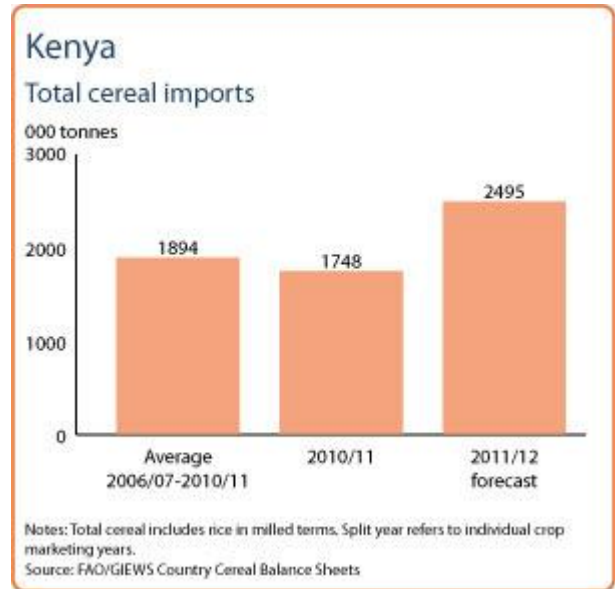
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Poor prospects for cereal production in marginal agricultural areas, while crop outlook in western areas shows some improvements

In bimodal south-eastern and coastal marginal agricultural areas, where harvesting of 2011 long-rains crops is underway, crop production (that usually accounts for 30 percent of annual output) is forecast to be very poor as many areas received less than 50 percent of the average amount of rainfall during the whole season. In some lowland areas, less than 20 percent of average production is anticipated following a 30 days dry spell that affected crops just after the onset of rains in March.

In the major crop growing areas of the Rift valley, Western and Nyanza provinces, earlier unfavourable prospects that followed the late onset of rains in many areas, were somewhat ameliorated with some good rains. Harvesting of the 2011 long-rains cereal crops is expected to begin in late August through December, with the bulk occurring in November.

Overall, the early forecast of the 2011 maize production (assuming an average output for next short-rains crops to be harvested in March/April 2012) is put at 2.5 million tonnes about 11 percent below last year.



Reference Date: 18-May-2011

FOOD SECURITY SNAPSHOT

- Poor 2011 long-rains affect pasture and livestock in pastoralist areas and crops in south-eastern and coastal areas
- Maize prices continue to increase, with declining terms of trade for pastoralists
- Growing concern over the worsening food security conditions for pastoralists in northern and north-eastern provinces and rural households in south-eastern and coastal lowlands

Late and erratic 2011 long rains affect livestock and crops in several parts

The 2011 long-rains season started late by up to four weeks in mid-April and precipitation was erratic especially in northern, eastern and north-eastern pastoral areas and in south-eastern and coastal marginal agricultural areas. Pasture and water resources have been seriously depleted following three consecutive poor rainy seasons. Worsening livestock body conditions, increasing mortality rates and reduced milk productivity is widely reported.

In bimodal southern and coastal lowlands, where harvesting of 2011 long-rains crops is expected to start in July, crop production (that usually accounts for 30 percent of annual output) is expected to be very poor. Many areas have received, so far, less than 50 percent of the average amount of rainfall. The rainy season is expected to end at the beginning of June and the possibility for crops to recover is negligible.

In major growing areas of Nyanza, Rift Valley and Western provinces, 2011 long-rains started with a delay of a couple of weeks, in April. However, production prospects are generally favourable due to recent beneficial rainfall but will still depend on performance of rains in the coming months, until next September.

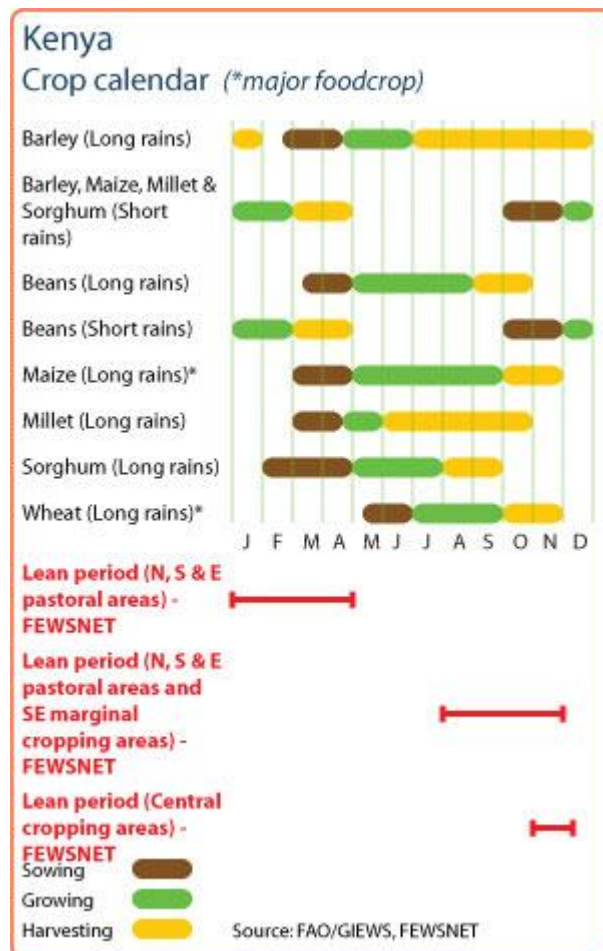
Overall, the early forecast of the 2011 maize production is put at 2.5 million tonnes about 11 percent below last year.

Maize prices continue to rise in most markets

The poor production of the 2010/11 second season (harvested last March) and the unfavourable prospects for the 2011 long-rains season in some agricultural areas have pushed maize prices up in all main markets of the country. In Nairobi and Mombasa wholesale markets, maize was traded between USD 360 and USD 400 per tonne in May 2011, an increase of about 80-100 percent on last 12 months. In one month alone, when compared to April 2011, the increase was an average of 8-12 percent in most markets, with peaks of 20 to 32 percent in deficit areas such as Eldoret and Kisumu.

Food security conditions expected to worsen in pastoral and marginal agricultural areas

The number of people in need of humanitarian assistance is currently estimated at 2.4 million, up from 1.6 million in January 2011. Most of the highly food insecure people are pastoralists and agro-pastoralists in



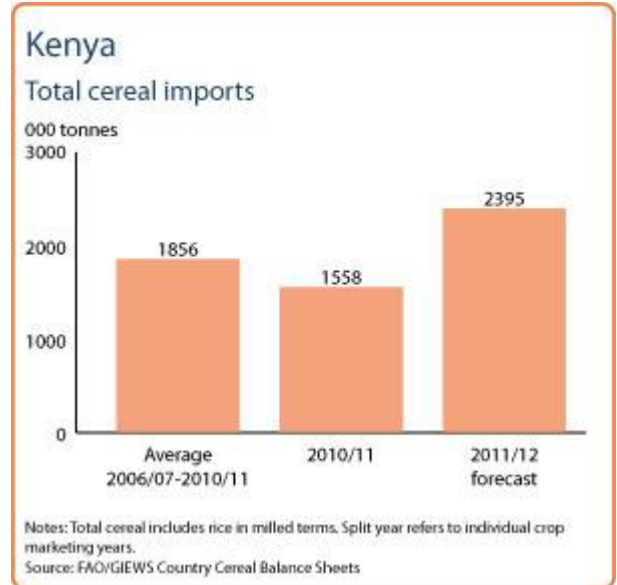
Kenya Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	2 757	2 800	2 500	-11
Wheat	312	400	300	-25
Sorghum	130	220	150	-32
Others	204	284	209	-26
Total	3 370	3 579	3 099	-13

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

northern and north-eastern provinces. Worsening livestock body conditions coupled with rising maize prices are causing a substantial deterioration in the terms of trade for pastoralists, limiting their access to food.

The food security conditions are expected to deteriorate in pastoral areas of Marsabit, Mandera, Isiolo and Wajir districts and in marginal agricultural areas of Turkana, Garissa and Tana River districts. Without the delivery of timely and significant food emergency assistance, this worsening food situation is expected to continue until October 2011 in pastoralist areas, when the 2011 short-rains are expected to start and in marginal agricultural areas with the beginning of next harvest in February 2012.



Reference Date: 28-March-2011

FOOD SECURITY SNAPSHOT

- Poor prospects for the 2010/11 short-rains season crops
- Deteriorating grazing resources and livestock conditions
- Worsening food security conditions for drought-affected pastoralists and rural households in the North and North-East

Dry weather conditions severely affected 2010/11 short-rains season crops and pasture

In bimodal south-eastern and coastal marginal agricultural areas, harvesting of the 2010/11 short-rains season crops is virtually complete. Maize production is officially estimated at very low 200 000 tonnes, almost a third of the good 209/10 output and about half the average, following a drier-than-normal weather conditions. Pastoral areas in the north of Eastern and North-Eastern provinces also received lower-than-average precipitation with gradual depletion of pasture and water supplies. Increasing trekking distances to fetch water and early clustering of livestock in limited grazing areas have been reported since last December. Competition for scarce grazing resources has increased, leading to a decline in livestock body conditions and milk production and to increased livestock mortality rates.

Unfavourable weather forecast for 2011 long rains in North-eastern provinces

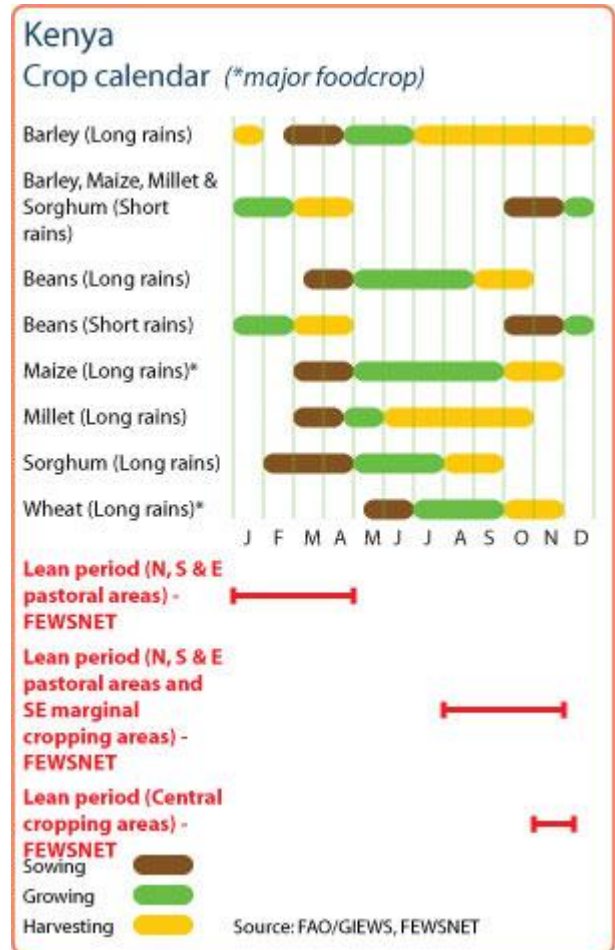
Planting of the 2011 long rains season crops has started from mid-March in major growing areas of Central, Rift Valley and Western provinces following the onset of the rainy season. By contrast, rainfall did not yet begin in the north-eastern provinces of Mandera, Wajir and Garissa and official weather forecasts indicate a high probability of below average and poorly distributed rains, with an early end at the beginning of May. This is expected to exacerbate the negative effects of the current drought conditions.

Maize prices continue to rise in most markets

Following a long period of steady decline due to the good harvests of both 2009/10 short-rains and 2010 long-rains seasons, maize prices started to increase at the end of 2010 in most markets as the lean season was reaching its peak in areas dependant on the short-rains crop. The increase has then been reinforced in recent months once the poor prospects of the 2010/11 short-rains season harvest have become apparent. In Nairobi and Mombasa wholesale markets, maize was traded in March 2011 at average USD 280-290 per tonne, about 30 percent above the price level of two months earlier.

Food security conditions expected to worsen in North and North-eastern provinces

The number of people in need of humanitarian assistance is currently estimated at 2.4 million, up from 1.6 million in January 2011. Most of the highly food insecure people are pastoralists and agro-pastoralists in the districts of Marsabit, Mandera, Isiolo, Garissa and Wajir in North and North-eastern provinces. The food security conditions are expected



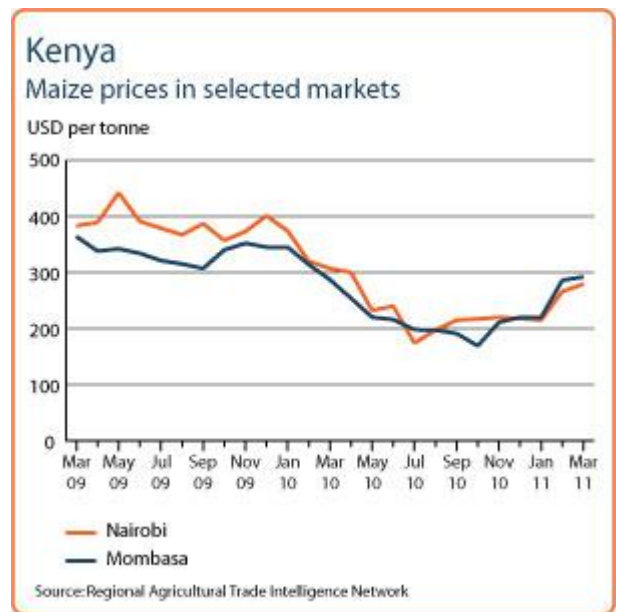
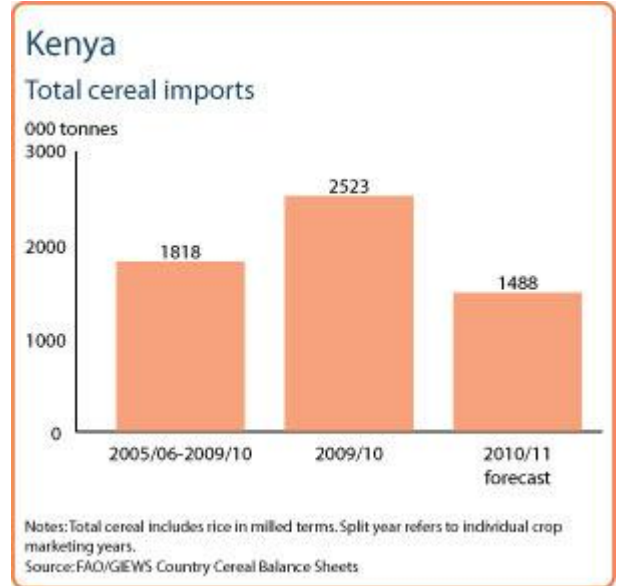
Kenya Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Maize	2782	2443	2800	15
Wheat	327	219	400	83
Sorghum	115	95	220	132
Others	180	155	159	3
Total	3404	2912	3579	23

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

to deteriorate in the coming months until the start of the 2011 long-rains season, bringing some relief to the depleted grazing resources.

Worsening livestock body conditions coupled with rising maize prices are causing a substantial deterioration in the terms of trade for pastoralists, limiting their access to food. Food security is also expected to worsen in marginal agricultural areas in south-eastern districts and in coastal cropping lowlands, where poor households may become moderately food insecure. These areas mainly depend on crops from the short-rains season, usually representing about 70 percent of the annual production, and the depletion of food stocks is expected to render households to rely mainly on increasingly expensive food markets.



Reference Date: 04-March-2011

FOOD SECURITY SNAPSHOT

- Very poor prospects for the 2010/11 short-rains season crops
- Deteriorating grazing resources and livestock conditions
- Worsening food security conditions for pastoralists and rural households in areas highly dependant on short-rains crops

Dry weather conditions severely affect the 2010/11 short-rains season crops and pasture

In bimodal south-eastern and coastal marginal agricultural areas, harvesting of 2010/11 short-rains season crops is underway and production prospects are very poor due to drier-than-normal weather conditions mainly caused by the meteorological phenomenon of La Niña. Land is being prepared in major growing areas of Central, Rift Valley and Western provinces for planting 2011 long rains crops.

Pastoral areas in the north of Eastern and North-eastern regions also received lower-than-average precipitations with gradual depletion of pasture and water supplies. Increasing trekking distances to fetch water and early clustering of livestock in limited grazing areas have been reported since last December. Competition for scarce grazing resources has increased, leading to a decline in livestock body conditions and milk production and to increased livestock mortality rates.

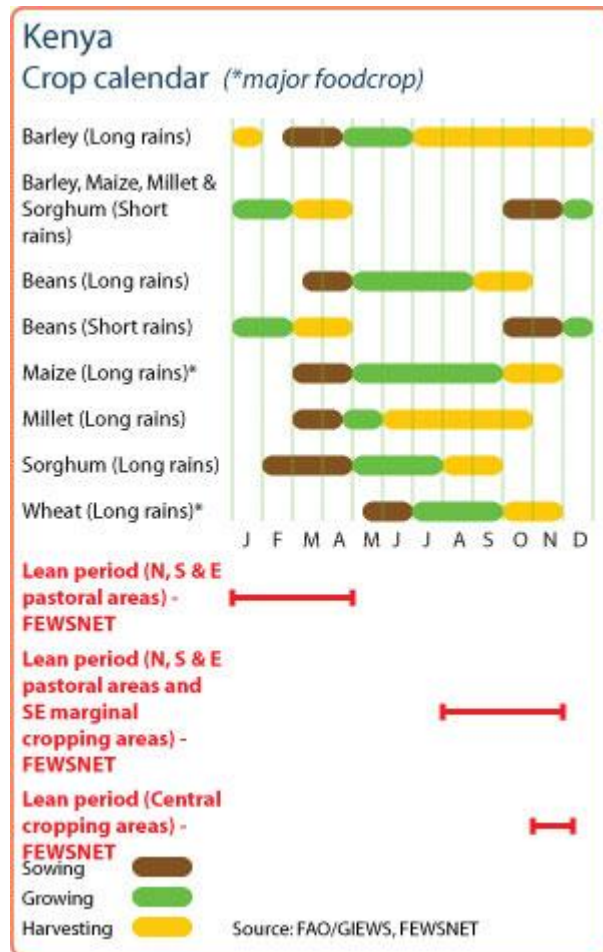
Maize prices keep rising in most markets

After a long period of steady decline due to the good output of both 2009/10 short-rains and 2010 long-rains seasons, maize prices started to increase at the end of 2010 in most markets as the lean season was reaching its peak in areas dependant on short-rains crop. The upward trend has then been reinforced in recent months following the apparent poor prospects of the 2010/11 short-rains season harvest. In Mombasa wholesale market, maize was traded in February 2011 at about USD 285 per tonne, almost 70 percent more than the lowest level registered in October 2010 and 30 percent above the previous month of January.

Food security conditions expected to worsen until the onset of long rains in April

The number of people in need of humanitarian assistance is currently estimated at 2.4 million, up from 1.6 million in January 2011. Most of the highly food insecure people are pastoralists and agro-pastoralists in the districts of Marsabit, Mandera, Isiolo and Wajir in Eastern and North-eastern provinces. Their food security conditions are expected to deteriorate further until April, when the start of the 2011 long-rains season is expected to bring some relief to the depleted grazing resources. The onset and performance of rains from April will be crucial and warrants close monitoring.

Worsening livestock body conditions coupled with rising maize prices are also likely to cause a substantial deterioration of the terms of trade for pastoralists, limiting their access to food markets. Food security is also expected to worsen in marginal agricultural areas in south-eastern districts and in coastal cropping lowlands. These areas mainly depend

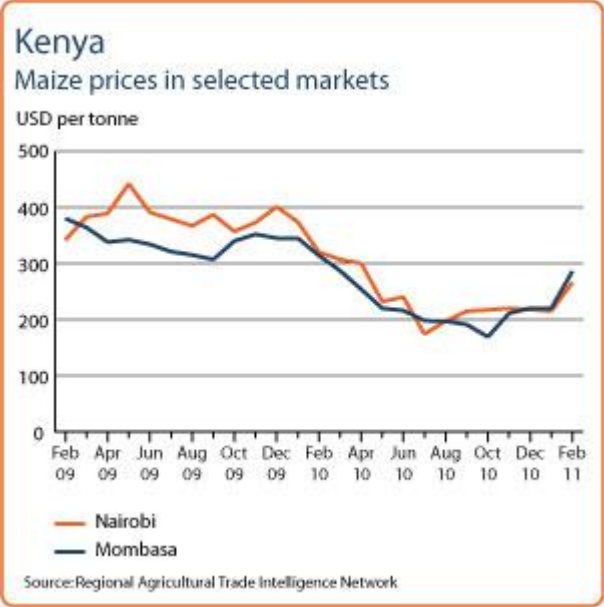


Kenya Cereal production

	2005-2009	2009	2010	change
	average		estimate	2010/2009
	000 tonnes			percent
Maize	2782	2443	3000	23
Wheat	327	219	225	3
Sorghum	115	95	130	37
Others	180	155	159	3
Total	3404	2912	3514	21

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

on short-rains season crops, which usually represent 70 percent of the annual production, and food stocks are expected to be quickly depleted as a consequence of the current poor harvest.



Reference Date: 05-January-2011

FOOD SECURITY SNAPSHOT

- Good 2010 long-rains maize production
- Poor prospects for the 2010/11 short-rains season crops
- Food security has generally improved since August, but the situation for pastoralists may deteriorate soon due to the effects of La Niña

Good maize crop production estimated for the 2010 long-rains season

Harvesting of 2010 long-rains season maize crop is about to be completed. Cereal production is expected to be good due to abundant and well distributed precipitations, especially in Central, Western and Nyanza provinces, as well as in key producing areas of the Rift Valley highlands. Only some northern and north-eastern districts, including Mandera, Wajir, Marsabit and Isiolo received below-average rainfall. Long-rains maize production is preliminarily estimated at 2.75 million tonnes, well above the five-year average and about 30 percent more than previous long-rains season that was severely affected by drought. However, the effect of current abundant off-season rains in key growing areas of the Rift Valley needs to be closely monitored, because it may significantly increase post-harvest losses and lead to a downward revision of crop production estimates.

Dry weather affecting 2010/11 short-rains season maize and pastures

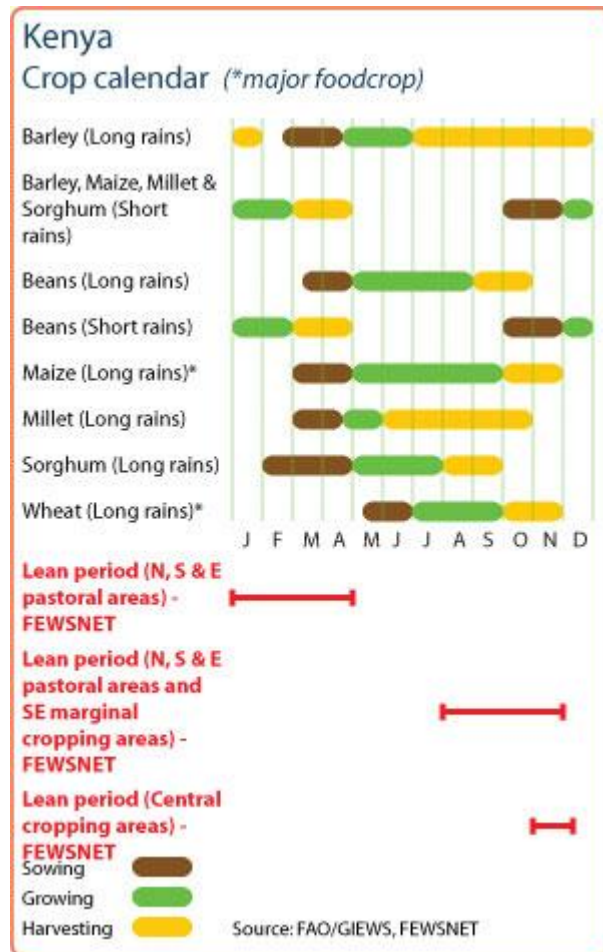
Despite a one month delay, planting of 2010/11 short-rains season crops, to be harvested in March, is virtually complete in bi-modal areas of Central, Nyanza and Western regions, in south Rift Valley highlands and in south-eastern lowlands. Early forecasts point to a below-average output due to drier-than-normal weather conditions caused by the meteorological phenomenon of La Niña, which is already affecting eastern and northern parts of the country.

North-eastern pastoral areas are also receiving lower-than-average precipitations with gradual depletion of pasture and water supplies, causing early clustering of livestock in limited grazing areas and increasing trekking distances to fetch water. Competition for grazing resources is also expected to increase due to the influx of livestock from drought-affected areas in southern Somalia. The overall situation is likely to worsen in coming months, offsetting the recovery in livestock body conditions and milk productivity that occurred during 2010 after three years of drought.

Maize price increase, but are still below average

Prices of maize have steadily declined during the first 8 to 10 months of 2010. This seasonal trend was also influenced by the Government's decision in May to make a downward revision of the producer price paid by the National Cereals and Produce Board, especially for the 2009/10 short-rains aflatoxin-infected maize crop, in order to mop it up from the market.

Maize prices subsequently began to increase between August and



Kenya Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	2782	2443	3000	23
Wheat	327	219	225	3
Sorghum	115	95	130	37
Others	180	155	159	3
Total	3404	2912	3514	21

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

October, especially in pastoral and marginal agricultural areas that are not dependant on long-rains crops as the lean period approached its peak. In Nairobi, the average wholesale maize price in December 2010 was about USD 230 per tonne, about 32 percent more than five months before, but still more than 40 percent less than the peak of USD 400 per tonne of December 2009. In some marginal agricultural areas in south-eastern and coastal lowlands, maize prices were at low levels during the planting period of 2010/11 short-rains season.

Food security declines except in some pockets in pastoral and marginal agricultural areas

The good prospect of the ongoing 2010 long-rains season crop, following above-average production of 2009/10 short-rains season crops, have improved food security conditions across the country. The number of people in need of humanitarian assistance is currently estimated at 1.2 million, down from 1.6 million in August 2010. Most of the highly food insecure people are pastoralists and agro-pastoralists concentrated in the districts of Marsabit and Isiolo in Eastern province that received poor 2010 long season rains.

Despite an improved food security situation at the national level, conditions are expected to deteriorate for pastoralists and agro-pastoralists, especially in North-East province and in Tana River district of Coast province, until March 2011, due to dry-weather conditions associated to the developing meteorological phenomenon of La Niña. Terms of trade for pastoralists are also likely to deteriorate, limiting households' access to food markets.



Reference Date: 08-September-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2010 long-rains season crops
- Maize prices continue to decline
- An estimated 1.6 million people in need of food emergency assistance

Favourable prospects for the 2010 long-rains season maize crop

Harvesting of 2010 long-rains season maize crop has started in Eastern and Western Nyanza and in central provinces and are expected to start in key producing areas of the Rift Valley highlands in October. So far, precipitation has been generally abundant and well distributed, except in some pastoralist areas of Turkana, Marsabit and Isiolo that received lower than average long-rains.

Early forecast of production points at 2.6 million tonnes, well above the last five years average and about 27 per cent more than the 2009 long-rains season production that was severely affected by drought. This positive outlook is due to the good weather conditions, but also due to the introduction of price subsidies for fertilizers by the government as well as the attractive maize prices registered in 2009 that induced farmers to increase planted area. About 200 000 small farmers received seeds and fertilizers through the National Accelerated Agricultural Input Access Program. Assuming an average short-rains season output to be harvested in March 2011, aggregate maize production is forecast at 3 million tonnes, about 12 percent above the last five years average.

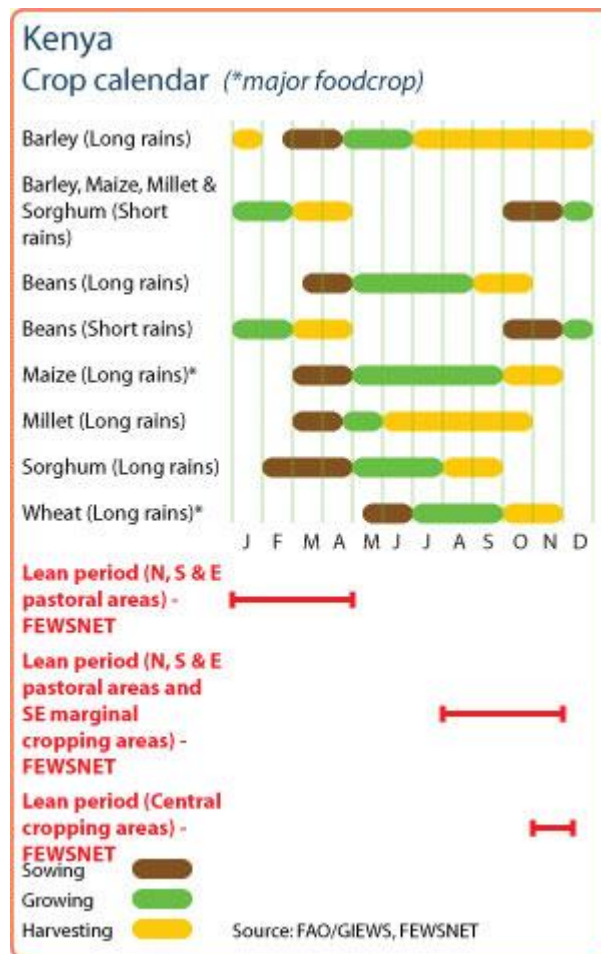
Heavy rains in April and May have caused floods in Central, Coast, Eastern, Rift Valley and Western provinces, causing losses of housing, infrastructures, crops and livestock. According to OCHA, flooding has affected about 130 000 people since January.

Maize prices continue to decline

Prices of maize have continued their declining trend that followed the record short-rains season production from late last year. In May 2010, this trend was reinforced when the Government of Kenya decided to make a downward revision of the purchase price of the National Cereals and Produce Board for both good and aflatoxin-affected maize crops. In Nairobi, the average wholesale maize price in August was about USD 170 per tonne, less than half of the value of the December 2009 peak and lower than the level of the end of 2007, just before the start of the food price crisis. The current decline in maize prices is improving food access, especially for low-income market-dependent households, in particular in urban and pastoral areas. However, this trend is likely to change in the coming months in pastoral and marginal agricultural areas that are not dependant on long-rains crops as the lean period approaches its peak.

Food insecurity declines except in some pockets in pastoral and marginal agricultural areas

The bumper crop from the 2009 short-rains season, harvested from



Kenya Cereal production

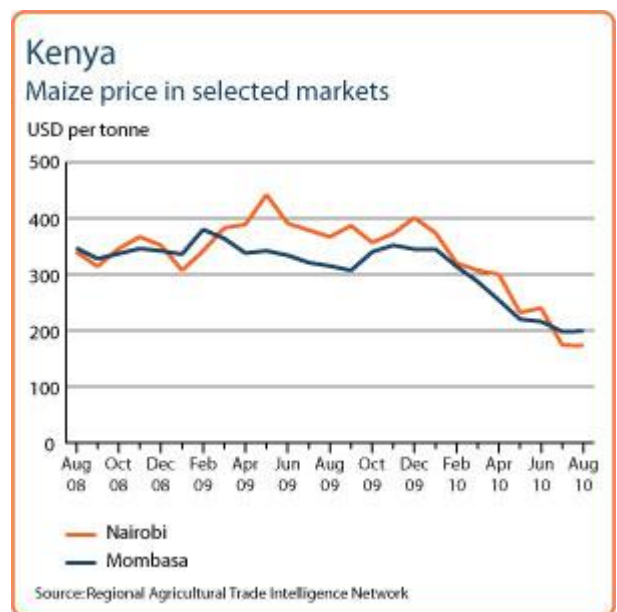
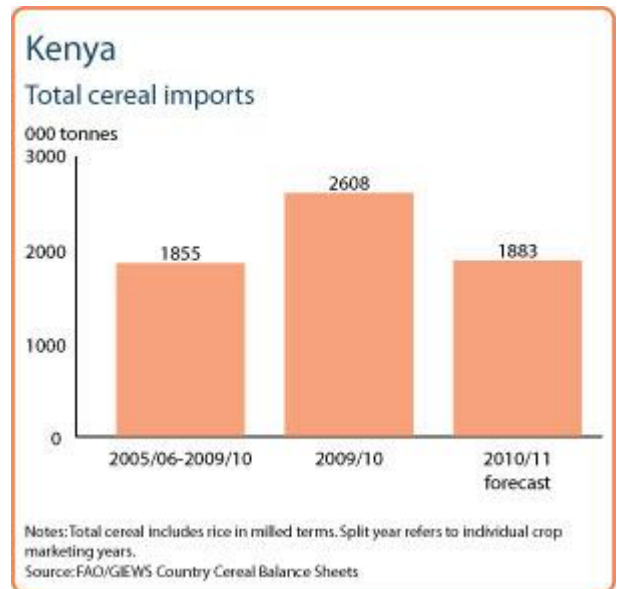
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	2630	2370	3000	27
Wheat	294	220	225	2
Sorghum	115	95	130	37
Others	172	135	129	-4
Total	3212	2820	3484	24

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

early this year, and the good prospect of the ongoing 2010 long-rains season crop, have improved food security conditions across the country. However, some pastoral areas in north-western districts of Turkana, Marsabit and Isiolo received poor 2010 long season rains thus reducing the availability of water, pasture and browse. Until the start of the 2010 short-rains season from next October, trekking distances are expected to gradually increase and the progressive clustering of livestock in areas with abundant water and pasture is likely to increase competition for resources with consequent risk of increased conflicts.

Overall, some 1.6 million people are currently estimated to be food insecure. Most food insecure people are pastoralists and agro-pastoralists concentrated in the districts of Turkana, Isiolo, Mandera, western Marsabit and northern Wajir, with three quarters of them in pastoral areas and the rest in marginal agricultural rural areas. In south-eastern and coastal areas, several poor households are highly food insecure, despite the good outturn of the last short-rains season maize crop, due to the aflatoxin contamination of some 30 per cent of production. The consequent loss of income following the reduced market prices may also have negative impact on 2010 short-rains season cropping, expected to start in October, for lack of access to adequate seeds and fertilizers.

Close monitoring is warranted for the likely occurrence of the “La Niña” phenomenon that may negatively affect the 2010 short rains (from October to December), particularly in northern and eastern pastoralist areas and in marginal agricultural areas in south-eastern lowlands that mainly depend on short-rains production. At the same time, “La Niña” may result in above average precipitations in western areas, including north-western pastoral zones, with positive effects on crops and pasture conditions.



Reference Date: 05-August-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2010 long-rains season crops
- Maize prices continue to decline
- An estimated 1.6 million people is in need of food emergency assistance

Favourable prospects for 2010 long-rains season maize crop

The 2010 long-rains season have started 2-4 weeks earlier than usual with the onset of rains from mid-February and early March in most cropping areas. So far, precipitation has been generally abundant and well distributed, except in some pastoralist areas of Turkana, Marsabit and Isiolo that received lower than average long-rains. Harvesting of 2010 maize crop is expected to start at the end of September and early forecast of production points at 2.6 million tonnes, well above the last five years average and about 27 per cent more than the 2009 long-rains season production that was severely affected by drought. This positive outlook is due to the good weather conditions, but also due to the introduction of price subsidies for fertilizers by the government as well as the attractive maize prices registered in 2009 that induced farmers to increase planted area. About 200 000 small farmers received seeds and fertilizers through the National Accelerated Agricultural Input Access Program.

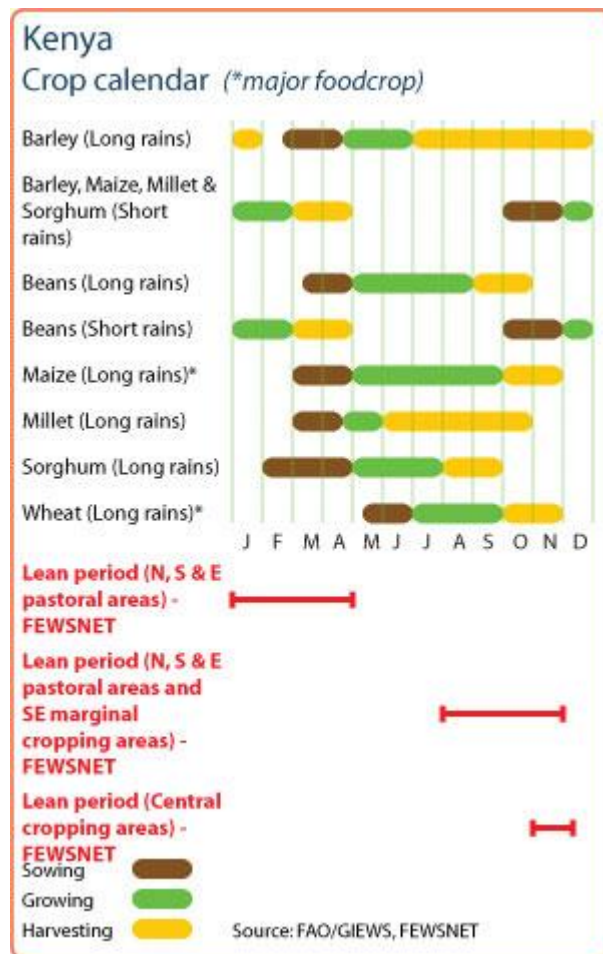
Heavy rains in April and May have caused localised floods around the Lake Victoria and along the Nzoia, Tana and Turkwell rivers, displacing about 20 000 people and causing losses of housing, infrastructures, crops and livestock.

Maize prices continue to decline

Prices of maize have continued their declining trend that followed the record short-rains season production from late last year. In May 2010, this trend was reinforced when the Government of Kenya decided to make downward revision of the purchase price of the National Cereals and Produce Board for both good and aflatoxin-affected maize crops. In Nairobi, the average wholesale maize price during July and the first half of August was about USD 170 per tonne, less than half of the value of the December 2009 peak and lower than the level of the end of 2007, just before the start of the food price crisis. The current decline in maize prices is improving food access, especially for low-income market-dependent households, in particular in urban and pastoral areas. However, this trend is likely to change in the coming months in pastoral and marginal agricultural areas that are not dependant on long-rains crops as the lean period approaches its peak and any reserves from the 2009 short-rains season maize output quickly runs out.

Food insecurity persists in some pastoral and marginal agricultural areas

Poor 2010 long-rains have hampered the recovery process that started with the abundant 2009 short-rains in some pastoral areas in Turkana, Marsabit and Isiolo. In these areas, availability of water, pasture and browse is expected to decline until October 2010 with the expected



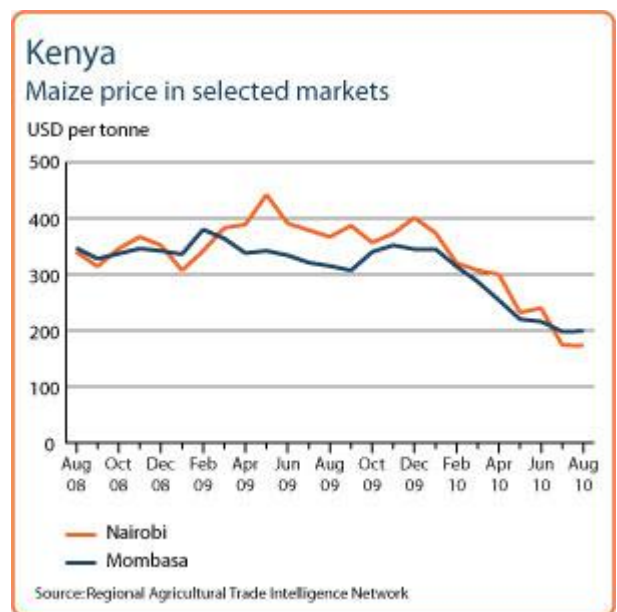
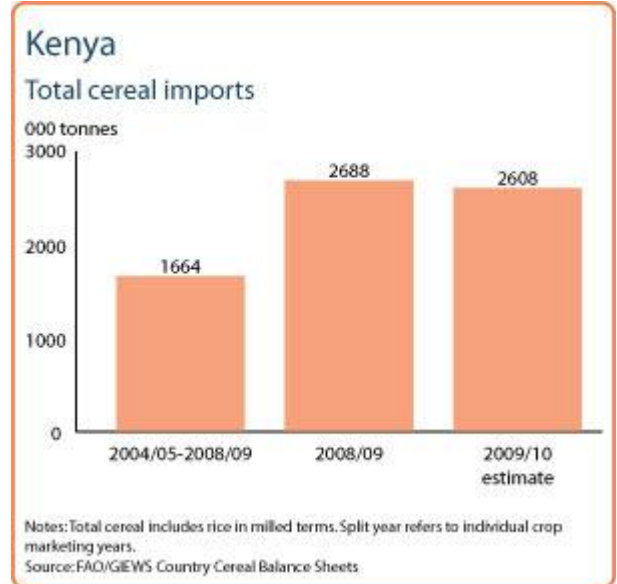
Kenya Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	2630	2370	3000	27
Wheat	294	220	225	2
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Others	172	135	129	-4
Total	3212	2820	3484	24

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

start of the 2010 short-rains season. Until then, trekking distances will gradually increase and the progressive clustering of livestock in areas with abundant water and pasture is likely to increase competition for resources with consequent higher risk of conflicts.

Overall, some 1.6 million people are currently estimated to be food insecure. Most food insecure people are pastoralists and agro-pastoralists concentrated in the districts of Turkana, Isiolo, Mandera, western Marsabit and northern Wajir, with three quarters of them in pastoral areas and the rest in marginal agricultural rural areas. In south-eastern and coastal areas, several poor households are highly food insecure, despite the 2009 short-rains bumper maize crop, because about 30 per cent of the production has been contaminated by aflatoxin which is not suitable for human consumption. The consequent loss of income due to reduced market price is expected to have also a negative impact on 2010 short-rains season that will start in October when poor farmers may not be able to properly buy seeds and fertilizers.



Reference Date: 26-May-2010

FOOD SECURITY SNAPSHOT

- An estimated 1.6 million people remain in need of emergency assistance
- Favourable prospects for the 2010 long-rains season crops
- Maize prices continue to decline

Favourable prospects for production of 2010 long-rains season crops

The 2010 long-rains season have started 2-4 weeks earlier than usual with the onset of rains from mid-February and early March in most cropping areas. Precipitation has been abundant and generally well distributed so far. Forecasts also indicate good rains to continue into June. Heavy rains in March and April have caused localised floods and landslides in Rift Valley, North-eastern, Coast, Western and Nyanza provinces, affecting about 130 000 people and causing damage to infrastructures, crops and livestock.

Planting of 2010 long rains maize crop is complete and planted area is estimated at an above average 1.8 million hectares. The introduction of governmental price subsidies for fertilizers as well as the attractive maize prices registered in 2009 are considered to be behind the increase. In particular, about 200 000 small farmers received seeds and fertilizers through the National Accelerated Agricultural Input Access Program. The shorter interval this year between the end of 2009/10 short rains and the beginning of 2010 long rains may have limited proper land preparation and thus the increase in the extent of planted area.

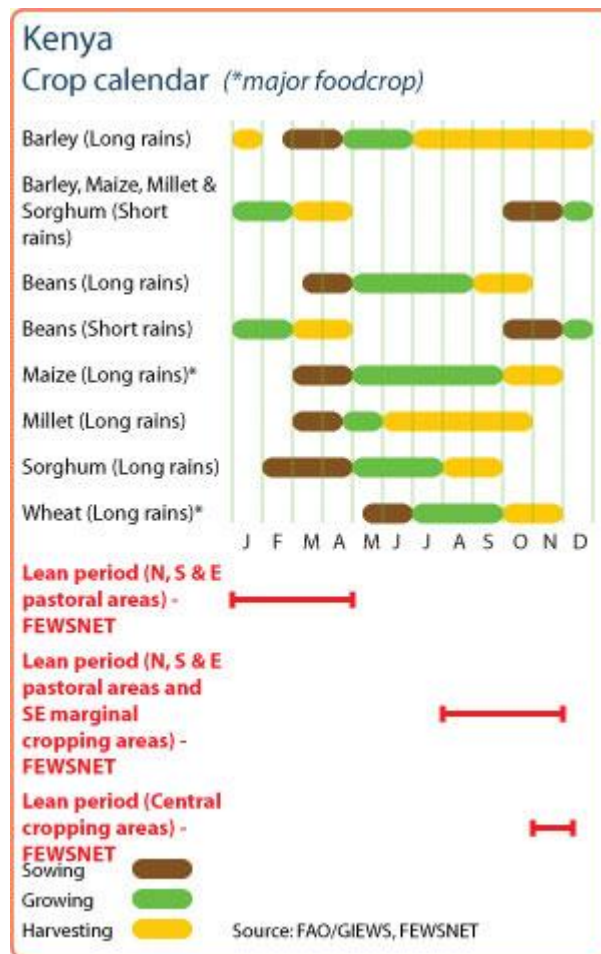
Prospects for the 2010 maize crop are highly favourable, but continued rains are needed until August, especially in key growing areas of the Rift Valley where harvest is expected to start from October.

Pastoral livelihoods continue to recover

With the exception of some north-eastern areas, the abundant short rains late last year and the early start of 2010 long-rains have benefited the drought-affected pastoral sector. Animal body conditions and milk production have gradually improved due to better pasture, browse and water availability (that are likely to last until the beginning of next short rains season in October) and reduced trekking distances. Kidding and lambing rates have increased by about 20 percent in the last months, contributing to the re-establishment of viable stock levels after several seasons with unfavourable dry weather conditions.

Maize prices continue to decline

Prices of maize show a declining trend since the end of last year when it was already evident that the 2009 short rains season production was going to be a record. The increased real supply of maize on markets (due also to the lifting of the export ban in Tanzania) has also contributed to the steady reduction in prevailing prices. In Nairobi, the May 2010 wholesale price of maize is about USD 200 per tonne, half of the value registered in December 2009 and quite similar to the level of the end of 2007, just before the start of the food price crisis. The current



Kenya Cereal production

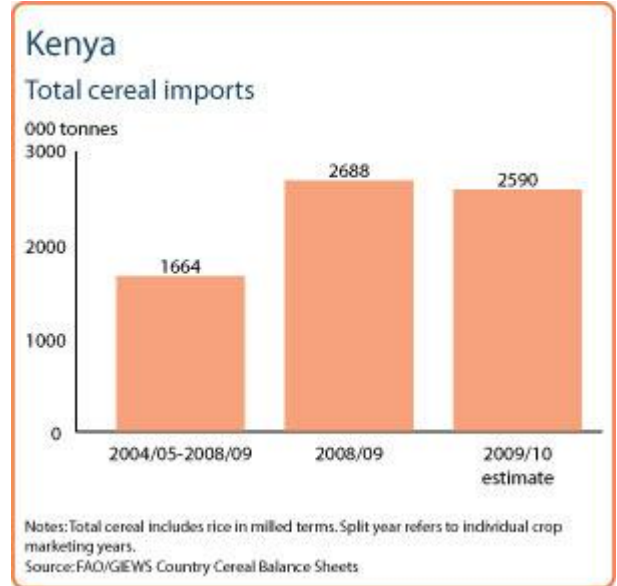
	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	2678	2160	2370	10
Wheat	326	225	220	-2
Sorghum	100	60	80	33
Others	155	109	129	18
Total	3259	2554	2799	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

decline in the price of maize, the main staple food crop, is improving food access for low-income market dependent households, especially in urban and pastoral areas. This trend may change in the coming months as the lean period begins in July, especially in pastoral and marginal agricultural areas.

Sharp decline in the number of people estimated to be in need of food assistance

Overall, some 1.6 million people are currently estimated to be moderately to highly food insecure. This number is considerably lower than the 3.8 million people that were requiring food assistance following the harvest of the 2009 drought-affected long rains season crops. This is mainly due to the recently harvested bumper crop of 2009/10 short-rains season, which represents about 80 percent of the annual production in south-eastern lowlands. Most food insecure people are pastoralists and agro-pastoralists concentrated in the districts of Turkana, Isiolo, Mandera, western Marsabit and northern Wajir that experienced a poor 2009 short rains season. Some food insecurity hotspots are still reported in south-eastern and coastal lowlands of Mwingi, Kitui, Makueni, Malindi, Kwale and Kilifi districts. Recent flooding has negatively affected food security in some areas of the north-east and the north-west, especially due to the upsurge of water and vector borne diseases and the disruption of road transportation system.



Reference Date: 31-March-2010

FOOD SECURITY SNAPSHOT

- Population in need of emergency assistance has shown a decline to an estimated 1.6 million people
- Favourable prospects for the 2010 long-rains season crops
- Cereal prices are declining but are still at above average levels

Bumper harvest for 2009 short-rains season

Harvesting of 2009 short-rains season maize crop, has just been completed and production is estimated at a bumper 540 000 tonnes. The increase in harvest is essentially due to enhanced rainfall that continued in February and early March in most areas of the country, often reversing the negative effects of the November dry spell. In particular, a 30 percent higher than average short rains cereal output is estimated in the drought-prone marginal agricultural districts of south-eastern Kenya. Heavy rains in early March have caused floods in north and northwest districts of Isiolo, Samburu, Moyale, Marsabit, Mandera and Turkana where localized losses of crops and livestock are reported. Aggregate cereal production in 2009 is estimated at about 2.8 million tonnes, 9 percent more than in 2008 but almost 15 percent less than the last five year average. Cereal import requirements for marketing year 2009/10 (July/June) are forecast at 2.6 million tonnes, slightly less than in 2008/09 when domestic production was severely affected by drought.

Favourable early prospects for production of 2010 long-rains season crops

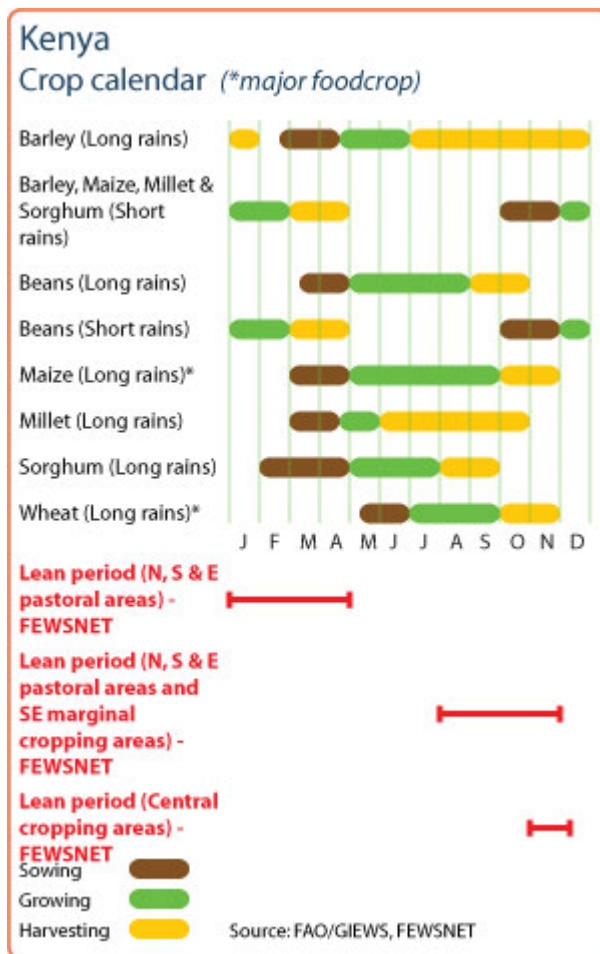
The 2010 long-rains had an early onset in March and they are forecast to be generally favourable until May in most areas, with the exception of coastal lowlands and parts of southern pastoral rangelands. Planting of 2010 long-rains cereal crops is underway in the highlands and planted area is expected to increase due to good weather forecasts, subsidized input prices and the likely implementation of warehouse receipts program by the Government of Kenya with guaranteed prices for small farmers. If beneficial rainfall will continue along the season, especially in key growing areas of the Rift Valley, 2010 cereal production is expected to be well above average levels.

Improvements in pastoral livelihoods

With the exception of some north-eastern areas, the abundant 2009 short rains and the early start of 2010 long-rains have benefited the drought-affected pastoral sector. Animal body conditions and milk production are gradually improving due to better pasture and water availability and reduced trekking distances. Calving, kidding and lambing rates are expected to rise further in the coming months if favourable weather conditions continue.

Maize prices declining, but still high

Prices of maize started to decline at the end of last year with the arrival on markets of the 2009 short rains season bumper production, but still remain well above average levels. In Nairobi, the March 2010 wholesale price of maize was USD 316 per tonne, substantially lower than USD 401 per tonne of last December, but quite higher than



Kenya Cereal production

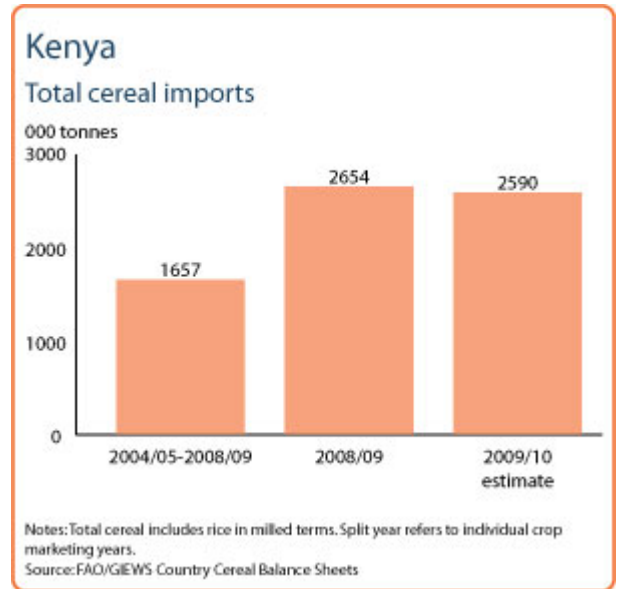
	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	2678	2160	2350	9
Wheat	326	225	220	-2
Sorghum	100	60	80	33
Others	155	109	129	18
Total	3259	2554	2779	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

USD 240 per tonne of March 2008, just at the start of the food price crisis. The current decline in the price of maize, the main staple food crop, is improving food access for low-income market dependent households, especially in urban and pastoral areas.

Sharp decline in estimated people in need of food assistance

Overall, some 1.6 million people are currently estimated to be moderately to highly food insecure. This number is considerably lower than the 3.8 million people that were requiring food assistance after the harvest of the 2009 drought-affected long rains season crops. This is mainly due to the recently harvested bumper crop of the 2009 short-rains season. . Most food insecure people are concentrated in the districts of Isiolo, Mandera, western Marsabit and northern Wajir that experienced a poor 2009 short rains season. Some hotspots of food insecurity are also reported in southern and coastal areas of Mwingi, Kitui, Makueni, Malindi, Kwale and Kilifi districts.



Reference Date: 29-January-2010

FOOD SECURITY SNAPSHOT

- Population in need of emergency assistance is estimated in 3.8 million people
- 2009 maize production is 21.5 percent below average
- Cereal prices remain at above average levels, deteriorating households' purchasing power

Poor rains affects 2009 long-rains maize yields and livestock body conditions

Harvesting of 2009 long-rains season maize crop, which accounts for 80 percent of total annual production, is about to be completed and production is officially forecast at 1.84 million tonnes, about 28 percent below average. Erratic and low cumulative rainfall levels, between 10 to 50 percent of normal, affected maize yields especially in Eastern, Coast and (part of) Rift Valley provinces. This has been the third consecutive season with inadequate rainfall. Dry weather conditions have also been severe in north western and eastern pastoral regions, deteriorating pasture availability and livestock body conditions with consequent increase of mortality rates. Water deficits have led livestock to undertake forced migrations with extended trekking distances in search of areas with improved water supplies that has often worsened body conditions, increased disease outbreaks and exacerbated resource-based conflicts among pastoralists. The poor body conditions have led to below normal livestock prices, deteriorating pastoralists' terms of trade and consequently limiting their access to staple foods.

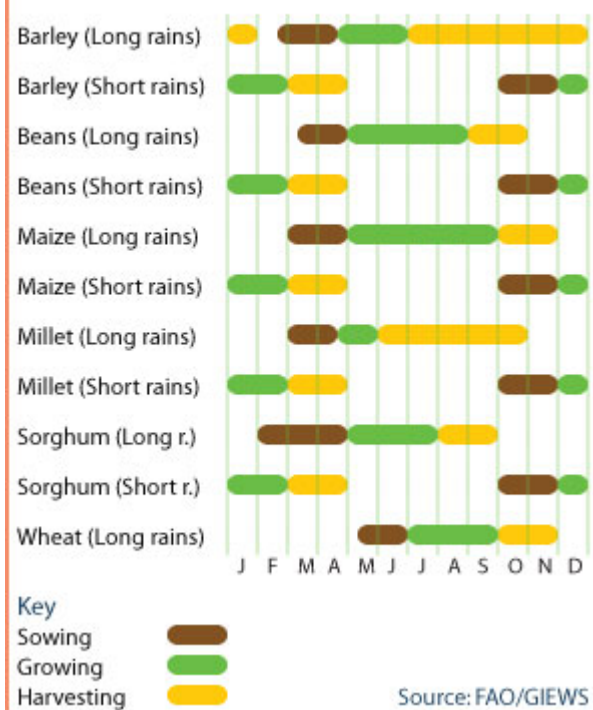
Unfavourable prospects for production of short-rains season crops

Harvesting of 2009 short-rains season crops is expected to start in the coming few weeks. Precipitations started early in October and resumed after a prolonged dry spell in November that affected south-eastern and coastal marginal agricultural areas and southern and north-western pastoral areas. In these areas, about 20-30 percent of crop needed to be replanted, likely causing a delay in the harvesting operations. In addition, during the second half of December, heavy rainfall has caused massive flooding in low lying areas of Northern, Central and Western provinces, washing away crops (mainly sorghum and maize) and livestock. It is reported that some 30 000 people have been affected, especially in the Turkana and West Pokot districts in the North Rift Region.

High food prices severely restrict households' access to food

Food prices remain at above average levels, reportedly as a consequence of inflated transportation costs for imported maize, due to congestion in Mombasa port. In Nairobi, the January 2010 wholesale price of maize was USD 408 per tonne, compared to USD 307 per tonne of 12 months before and to USD 223 per tonne of 24 months earlier. The persistent high prices have restricted food access for low-income market dependent households, especially in urban areas where wages have remained comparatively static.

Crop calendar Kenya



Almost 3.8 million people need food assistance

Overall, some 3.8 million people are estimated to require food assistance through February 2010, when the arrival on markets of 2009 main maize crop production is expected to slightly improve the food security situation. The number of food insecure people is likely to increase from April/May when food stocks associated with a poor crop production will be depleted.

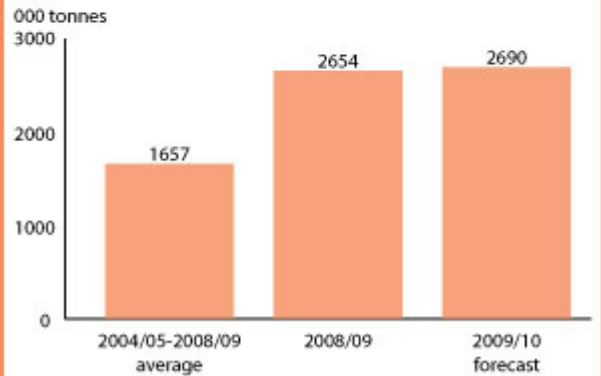
Kenya

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	2678	2160	2100	-3
Wheat	326	225	220	-2
Sorghum	100	60	80	33
Others	155	109	129	18
Total	3259	2554	2529	-1

Note: percentage change calculated from unrounded data.

Total cereal imports

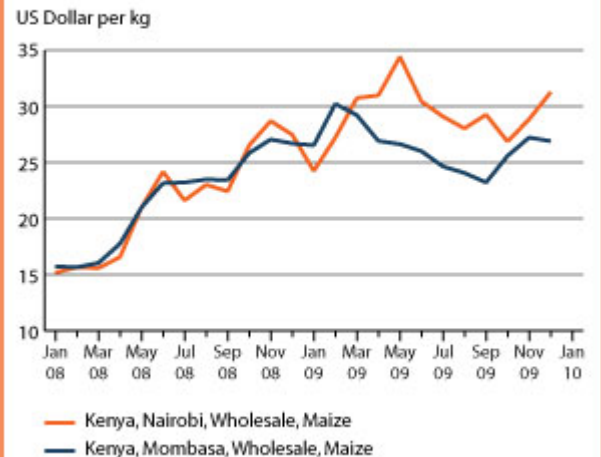


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Kenya

Maize price in selected markets



Source: Regional Agricultural Trade Intelligence Network

Reference Date: 15-September-2009

FOOD SECURITY SNAPSHOT

- An estimated 3.8 million people require emergency assistance following below average cereal production in 2009
- Marginal agricultural regions in south-east receive unfavourable rainfall, lowering cereal production expectations
- Cereal prices remain at above average levels, deteriorating households' purchasing power

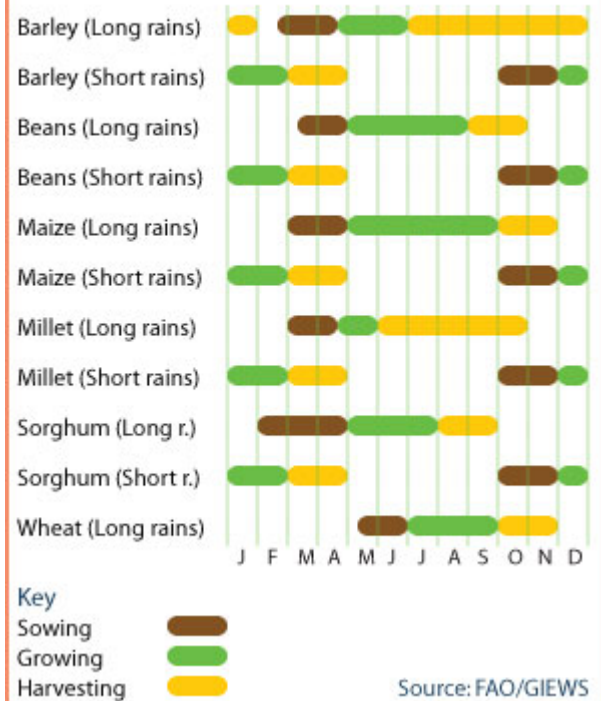
Unfavourable prospects for 2009 long-rains maize crop

Harvesting of 2009 long-rains season maize crop, which accounts for 80 percent of total annual production, is underway and production is early estimated at 1.84 million tonnes, about 28 percent below normal levels. By the end of May, erratic and low cumulative rainfall levels, between 10 to 50 percent of normal, affected maize yields especially in Eastern, Coast and (part of) Rift Valley provinces. This is the third consecutive season with inadequate rainfall. Dry weather conditions were also very severe in north western and eastern pastoral regions, deteriorating pasture availability and livestock body conditions with consequent increase of mortality rates. Water deficits have also led livestock to undertake forced migrations with extended trekking distances (up to 40 kilometres) in search of areas with improved water supplies that has often worsened body conditions, increased disease outbreaks and exacerbated resource-based conflicts among pastoralists. The poor body conditions have led to below normal livestock prices, deteriorating pastoralists' terms of trade and consequently limiting their access to staple foods.

High food prices severely restrict households' access to food

The sustained high food prices at national level are exacerbating food insecurity conditions. Maize prices still remain at above average levels, reportedly as a consequence of inflated transportation costs for imported maize, due to congestion in Mombasa port. The persistent high prices have restricted food access for low-income market dependent households, especially in urban areas where wages have remained comparatively static.

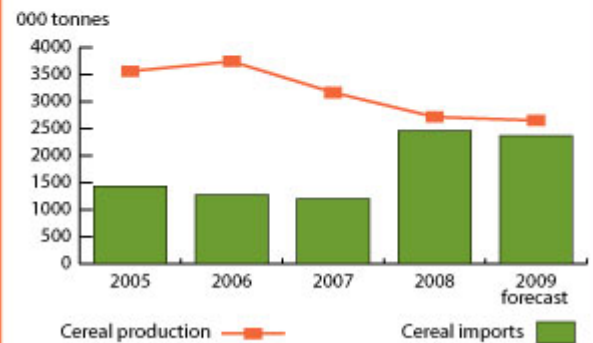
Crop calendar Kenya



Source: FAO/GIEWS

Cereal production and imports Kenya

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	2714	2340	2150	-8.1%
Wheat	326	225	300	33.3%
Sorghum	100	60	90	50%
Other	141	93	113	21.5%
Total Cereals	3276	2718	2653	-2.4%

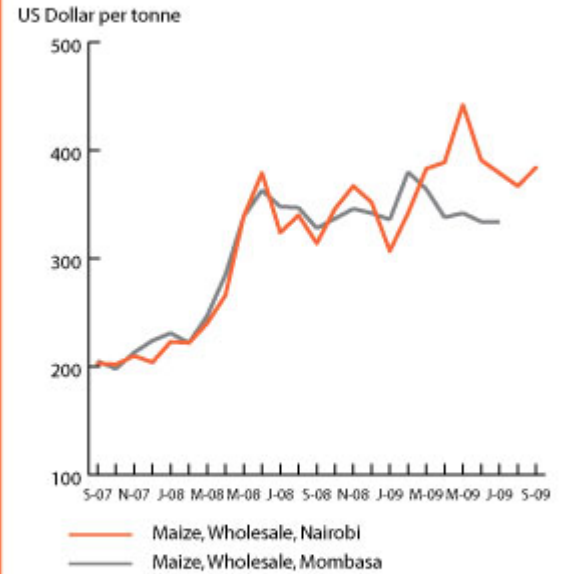


Source: FAO/GIEWS Country Cereal Balance Sheets

Almost 3.8 million people are highly food insecure

The poor performance of 2009 'long rains' maize crop, combined with already depleted national cereal stocks, exports bans in neighbouring countries (Uganda and Tanzania) and persistent high cereal prices, is contributing to lowering food availability and access. An estimated 3.8 million people in rural areas are highly to extremely food insecure. The extremely food insecure populations include pastoralists in many parts of Marsabit, Isiolo, Samburu, and Tana River districts, and marginal agricultural farm households in parts of Mwingi and Kitui districts. Local food security situation may slightly improve by the end of the year due to the positive effects on crop yields of expected beneficial El Niño rains. These precipitations however are likely to cause damaging flash floods and to create good conditions for an upsurge of water and vector-borne diseases such as malaria and Rift Valley Fever.

Kenya Selected food prices



Source: Regional Agricultural Trade Intelligence Network