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Food Situation Assessment and Prospects for 2017/2018

By

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Introduction

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Food and nutrition security critical to Kenya's economic and social well-being

Kenya depend largely on her own food production in meeting the national food needs; Balance met by imports

Kenya and the neighboring countries in the region experienced a devastating drought in 2016. Led to:

- Low crop production
- Food shortages
- High commodity prices
- Loss of livestock in pastoralist and agro-pastoralist areas

Key lesson: Need for close and periodic monitoring of crop performance and food situation in the country

Objectives

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To establish the general food situation in the country with emphasis on maize, rice, wheat, potatoes and other major staples

Specifically, the study sought to:

a) Evaluate crop performance in the 2017 long rains season

b) Assess the condition of and prospects for short season crops

c) Assess the impact of Fall Armyworm and other pests and diseases on the performance of the long and short rains crop

d) Establish food security status of the country

e) Draw lessons and policy relevant recommendations

Methodology

Eight (8) counties purposively selected for the study

Counties include:

- ✓Nyanza region=> Kisumu
- ✓Western region=> Kakamega
- ✓Rift Valley region=> Trans Nzoia, Uasin Gishu, Nakuru, Narok
- ✓Central region=> Kirinyaga
- ✓Eastern region=> Meru

Data collection:

- KII, FGDs with CDAs, CCOs, CADOs, SCAOs, WAOs, Farmers, NCPB managers
- Secondary data review
- Observation

Rainfall performance, 2017

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March-April-May

- Late Onset and early cessation; mostly sunny and dry throughout March
- Below normal MAM rains; much of it in April and early May
- Poorly distributed in space and time
- A severe dry spell in late May to June
- Late planting, poor crop establishment, flower abortion in beans
- Reduced crop acreage

June-July-August

- Near normal JJA rains in several parts of Western Kenya and Rift Valley
- Temperatures generally higher than LTA
- Moisture stress conditions during dry spell
- Some farmers converted crop to silage
- Short period crops e.g beans, potatoes severely affected
- Enhanced July rains coincided with bean harvesting, aided recovery

Challenges during LR season

Fall Armyworm attack and infestation

- First detected in March 2017 in Western Kenya
- Severe infestation coincided with May-June dry spell
- Over 800,000 Ha of maize affected
- Generally late response to the attack
- JJA rains coupled with other interventions suppressed FAW
- Estimated loss during LR is 10% projected harvest
- Still present; infestation reported in SR crop

Maize head smut

- Emerging challenge in Nyanza, Western and Rift Valley regions
- Increasing incidences reported
- Lack of proper knowledge on cause and management among farmers

Inconsistent supply of subsidized fertilizers

Historical production of key staples

Crop	Unit	2012	2013	2014	2015	2016	5 year Average
Maize	Million Bags	41.9	40.7	39.0	42.5	37.1	40.2
Beans	Million Bags	6.8	7.9	6.8	8.5	8.1	7.6
Potatoes	Million Tonnes	1.5	2.1	2.3	2.0	1.3	1.8
Sorghum	Million Bags	1.9	1.7	1.9	2.1	1.3	1.8
Millet	Million Bags	0.8	1.4	1.4	1.1	0.6	1.1

Source: *Economic Survey, 2017/Authors*

- A dip in production of staples in 2016
- Maize production below estimated 45-50 million National demand
- Potato production recorded 33% growth between 2012 and 2015
- Potato also a major staple in the country

Maize performance in LR

Region	Area	Production
	Ha	Bags (90 Kgs)
Rift valley	627,220	16,841,480
Nyanza	221,872	2,593,850
Central & Nairobi	102,028	1,599,580
Western	215,580	5,620,318
Eastern	208,290	1,508,600
Coast	114,700	915,589
Total	**1,489,690**	**29,079,417**

Source: *MoALF, July 2017 FSA report*

Reduced acreage from 1.8 million Ha to 1.5 million Ha due to:

- Loss to FAW
- Late onset and drought – Non-planting & conversion to silage
- Replacement of maize by other crops e.g horticultural crops

LR Maize performance from selected counties

County	Area	Production	LTA	% Diff
Trans Nzoia	106,951	4,848,795	5,200,000	-7%
Uasin Gishu	103,335	3,600,000	4,271,545	-16%
Nakuru	86,690	1,432,820	2,034,055	-30%
Narok	85,720	985,978	1,685,305	-41%
Kakamega	73,750	2,457,950	2,100,000	17%
Kisumu	32,679	493,712	1,005,000	-51%
Meru	19,523	49,738	112,250	-56%
Kirinyaga	15,866	245,800	294,000	-16%
TOTAL	**524,514**	**14,114,793**	**16,702,155**	**-15%**

Source: *July County FSA reports, various counties*

Short Rains Prospects - Weather

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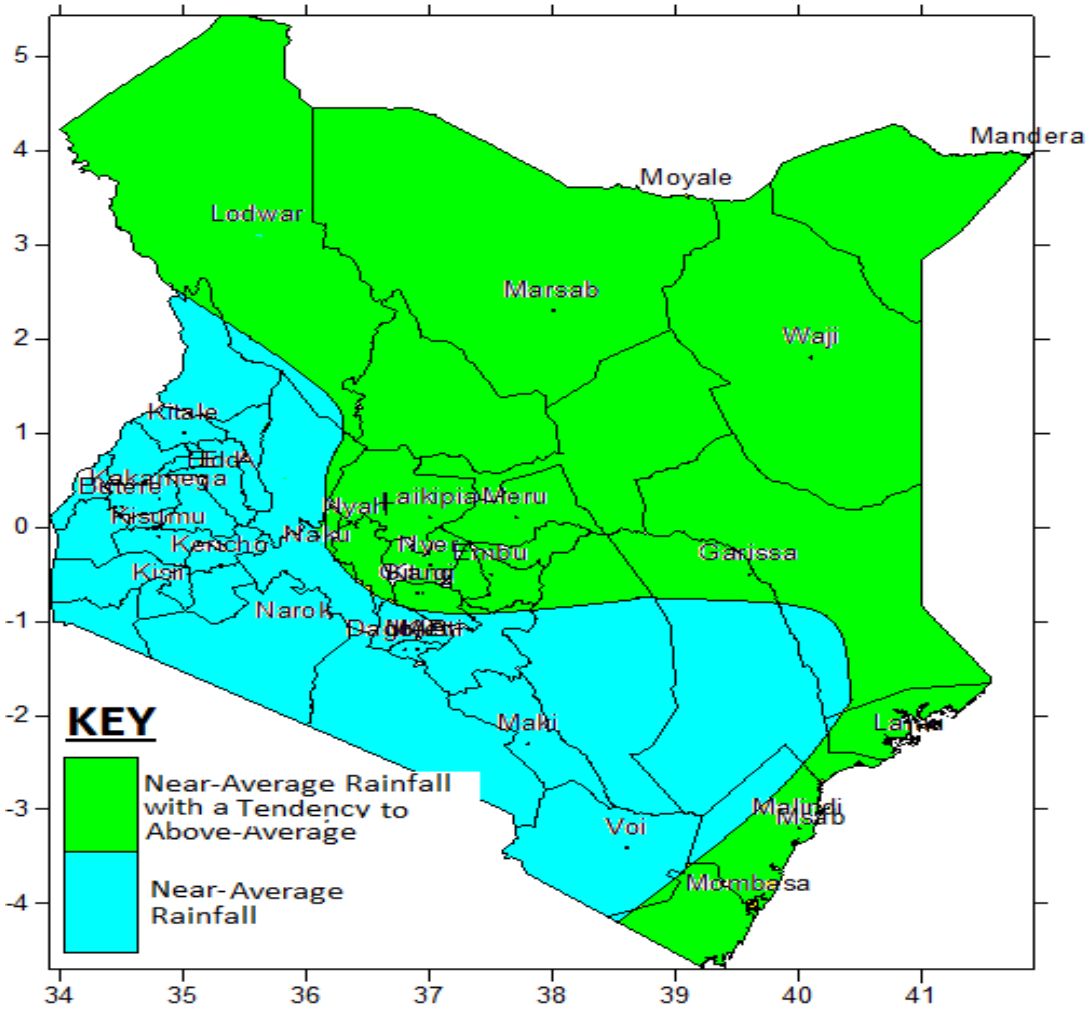
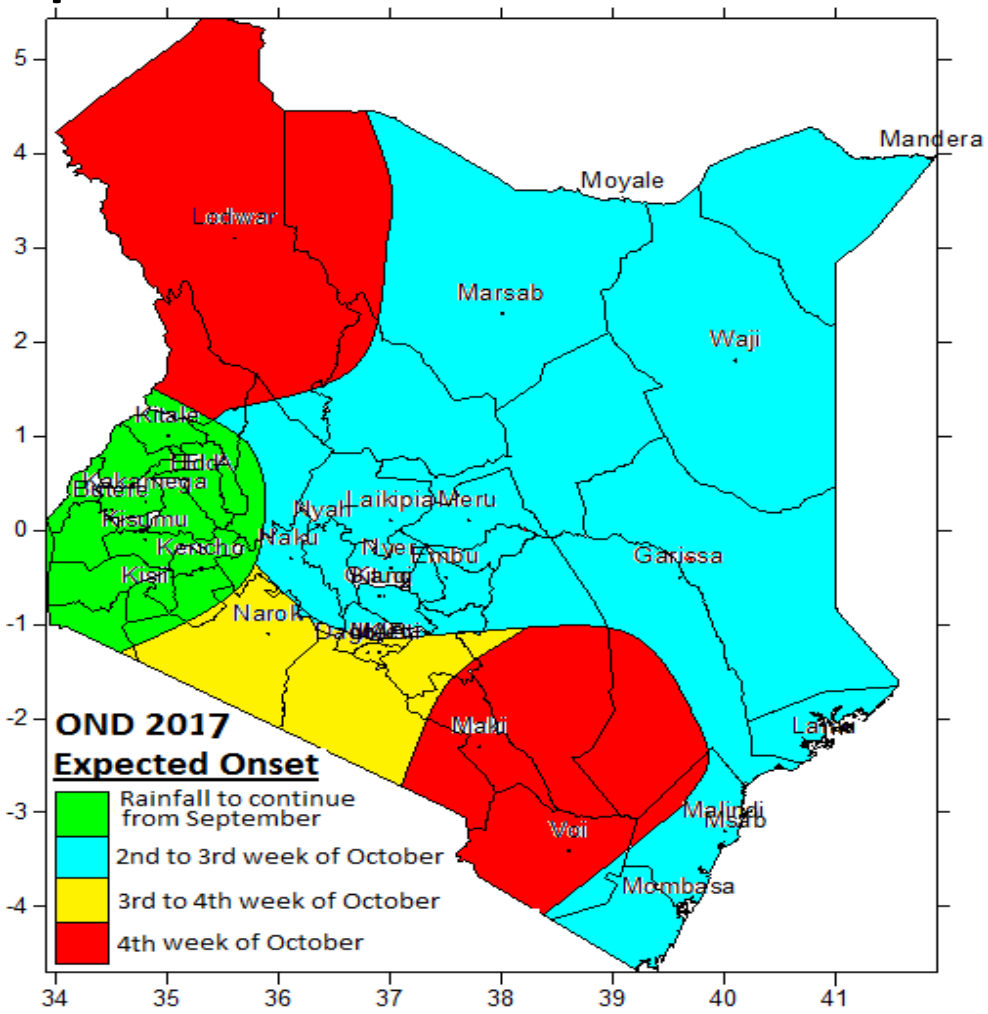
OND 2017 Rainfall outlook



Expected OND 2017 onset dates



Source: KMD, August 2017

Short Rains Maize Prospects

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Region	Area	Forecast Production
	Ha	Bags (90 Kgs)
Rift valley	91,419	1,335,210
Nyanza	35,660	333,970
Central & Nairobi	44,322	147,840
Western	28,532	287,490
Eastern	79,050	470,400
Coast	28,981	15,476
Total	**307,964**	**2,590,386**

Source: MoALF, July 2017 FSA Report

Imports

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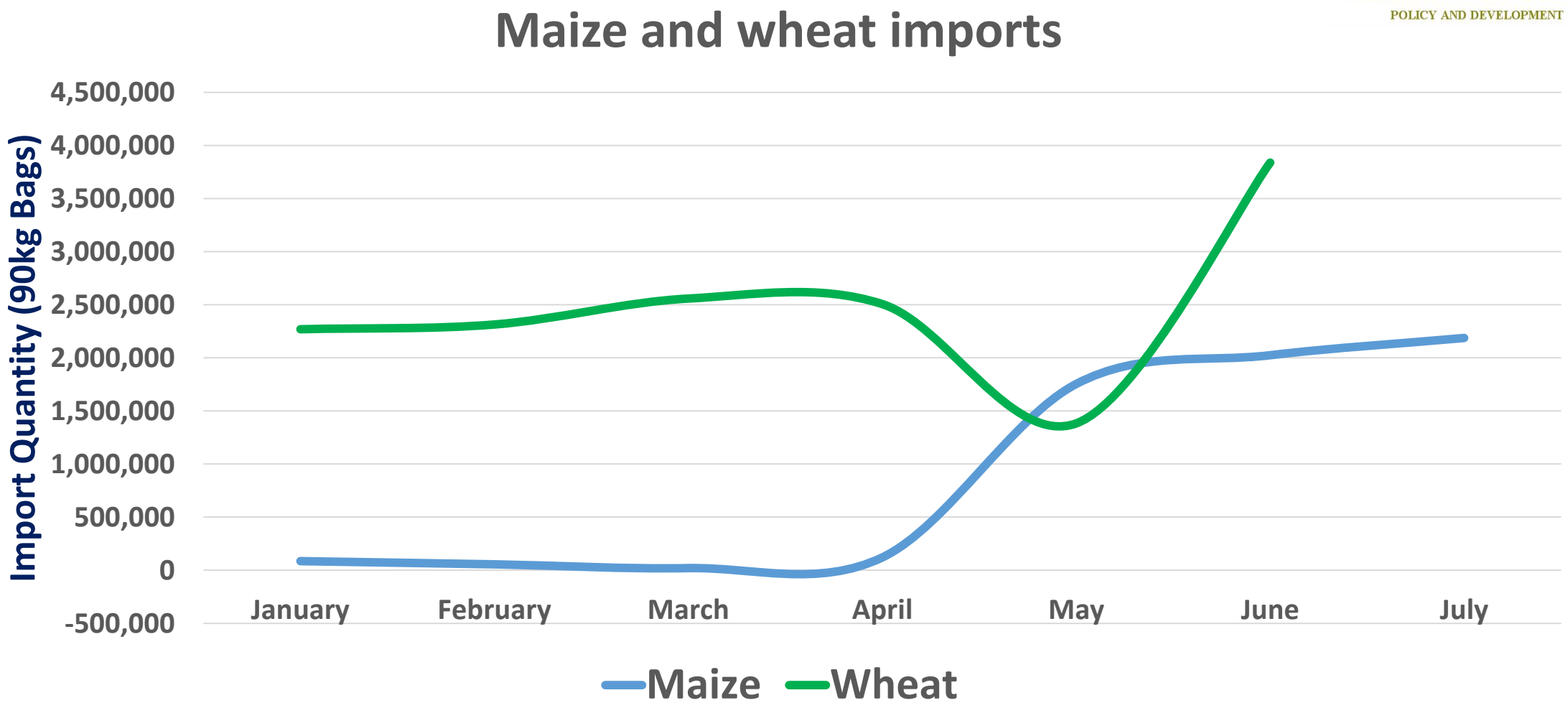

Source: *MoALF, July 2017 FSA report*

Stocks of selected food grains (31st July)

Food grain	Farmers	Traders & Millers	NCPB	Totals
Maize	4,403,580	850,000	440,850	5,749,430
Beans	2,570,500	336,000	0	2,906,500
Wheat	120,000	3,838,577	0	3,958,577
Rice	5,182	621,368	0	626,550

Source: *MoALF, July 2017 FSA report*

- Stock levels generally low
- Expected to improve with LR harvest
- 76.6% of stocks held by farmers
- Traders & NCPB held 14.8% and 7.7% respectively
- Rice, wheat, Beans also crucial for food security

Stocks and Maize balance sheet

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Maize Balance Sheet- August to March 2018	**Scenario 1**	**Scenario 2**	**Scenario 3**
Stocks as at 31st July, 2017 in 90kg bags	5,749,430	5,749,430	5,749,430
Estimated Imports between August to March 2018	-	-	-
i) Private sector/ Relief agencies estimated imports	2,500,000	2,500,000	2,500,000
ii) Government imports (SFR)	1,000,000	1,000,000	1,000,000
Estimated Harvests between August to March 2018			
i) Estimated 2017 L.R Harvests	25,000,000	25,000,000	25,000,000
ii) Estimated 2017 S.R Harvests	2,590,386	2,000,000	3,000,000
Total available stocks between August to March 2018	**36,839,816**	**36,249,430**	**37,249,430**
Expected total exports to East Africa Community region	-	-	-
Expected exports outside the EAC region	-	-	-
Post – harvest storage losses estimated at 12%	4,420,778	4,349,932	4,469,932
Amount used for domestic livestock feeds (1%)	368,398	362,494	372,494
Amount retained as seed (1%)	368,398	362,494	372,494
Amount used for manufacture (2%)	736,796	724,989	744,989
Net available stocks between August to March 2018	**30,945,445**	**30,449,521**	**31,289,521**
Consumption @3.39 million bags/Month for 47 million people for 8 months	27,155,552	27,155,552	27,155,552
Forecast Balance as at 31st March 2018	**3,789,893**	**3,293,969**	**4,133,969**

Prices

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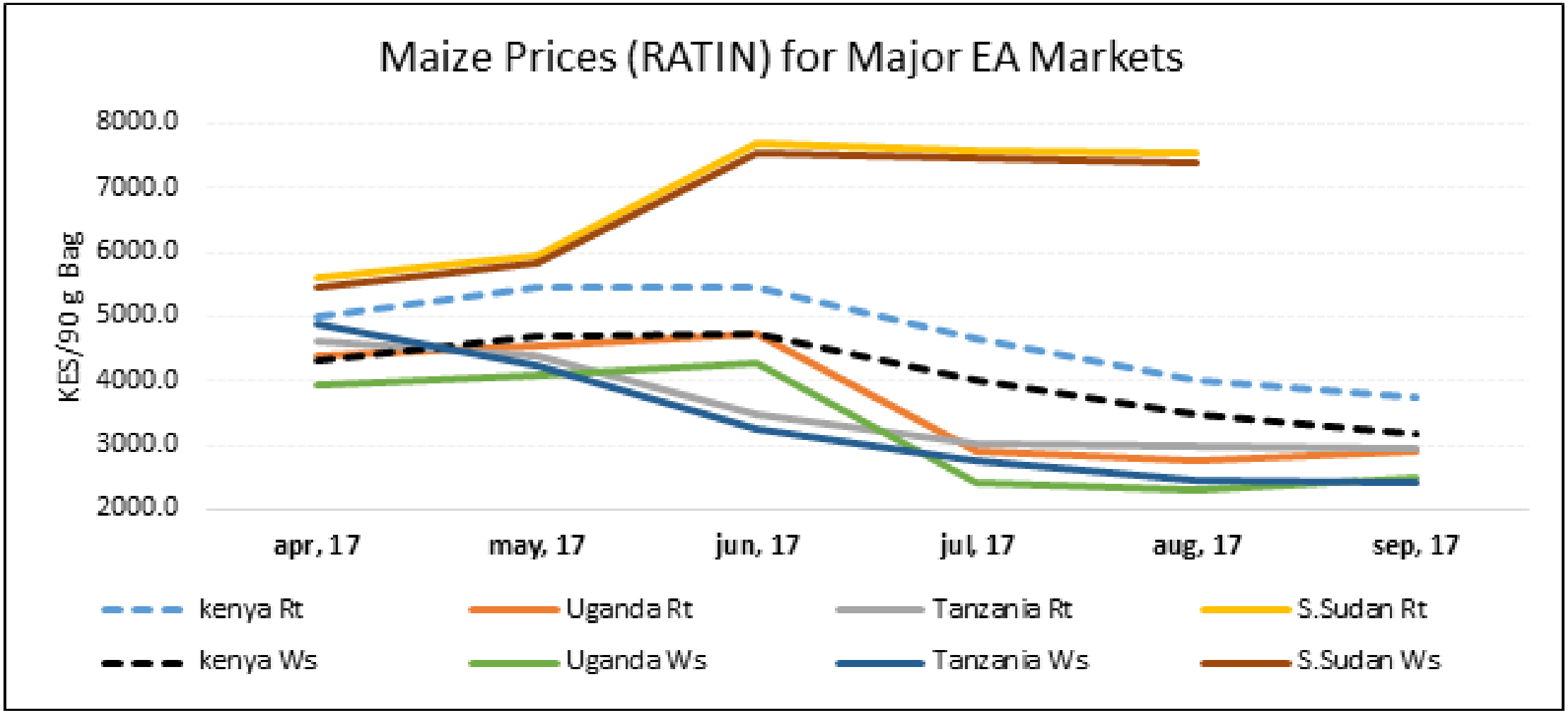

Findings

- 2017 long rains season crop suffered many challenges including:
  - Late onset, depressed and erratic patterns of MAM rains, early cessation
  - Prolonged dry spell in late May and June
  - Attack and infestation by FAW
  - Incidences of maize head smut disease and MLND
  - Inconsistent supply of subsidized fertilizers
- 2017 production expected to be lower than 2016 harvest by an estimated 20%
- Food situation has improved in parts of the country such as Nyanza, Western, Central and parts of Rift Valley regions from LR harvests
- Food situation in most pastoral and agro-pastoral areas dire
  - >3.5 million people acutely food insecure and in need of humanitarian support
- National & Regional wholesale and retail maize prices declining

Findings…

- The projected enhanced OND rains could enhance SR yields
  - Post-maturity field losses & Post-harvest losses
- Stock levels generally low but improving from LR harvests
- Current stocks, LR and projected SR Harvests could last the country to at most end of April 2018 – Approximately 9 months
  - Maize imports enough for May, June, July needed before next harvest
  - Contribution of other staples like Wheat, Rice, Potatoes, Plantain important

Lessons & Recommendations

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- Reduction of Post-harvest losses critical for food security
  - Investment in on-farm and off-farm storage technologies
  - Better post harvest handling and management
- Rain fed production system uncertain and overwhelmed
  - Need to efficiently produce maize and other staples under irrigation
  - Need for periodic close monitoring of performance and effects on food security
  - Development and strengthening of early-warning-systems
- Constant surveillance and concerted multidisciplinary efforts to identify and control field and storage pests and diseases to minimize losses
  - Investment in training of agricultural practitioners and farmers
  - Investment in agricultural research and emphasis on evidence based interventions
  - Knowledge management and sharing; incorporation of Indigenous Technologies and Knowledge
  - ‘Making extension function again’
  - Rapid response strategies incase of attack/outbreak
- National food security highly dependent on MAIZE
  - Promote production and access of other food crops as Kenyans diversify consumption

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THANK YOU