EASTERN AFRICA CROP MONITOR

BULLETIN NO. 7:

Season Update June 2020

ICPAC

OVERVIEW

Climate: The East Africa region witnessed the wettest March to May period in the region since 1981. Early onset of rainfall led to early agricultural activities. The unusually high rainfall amounts also led to localized flooding, mudslides, flash floods and river overflows in parts of Kenya, Somalia, Uganda, Tanzania, Rwanda, and Burundi. Abundant rainfall however has so far been beneficial to crops and expected to continue being favourable into the June-September season. The rains have also promoted the invasion, development and multiplication of desert locust in the arid and semi-arid areas of the region.

Crops: The Eastern Africa region is currently under different crop stages; Planting and vegetative in the northern sub-region and vegetative to early maturity stages in equatorial and southern regions. Most crop regions are under watch conditions in the north and equatorial sub-sector due to flooding caused by high rainfall amount in crop areas and favourable in southern subregion due to above average rains experienced as per May 2020 assessments. Desert locust has affected some crop areas in agro-pastoral zones of Ethiopia, Central Somalia and Northern Kenya and there is a risk of invasion in the June-August seasonal agricultural areas.

Trade: Regional trade declined due to increased local production and improved market supplies in most markets as a result of favourable rainfall in the previous season. Since March 2020, recently enacted COVID-19 control measures affected prices differently across the countries. Staple maize commodity parity price trends were near and below average across most markets. Although inflation was also high in South Sudan, increasingly high supplies from Uganda sustained typical increasing price trend that were lower than the average but still the highest in the region.

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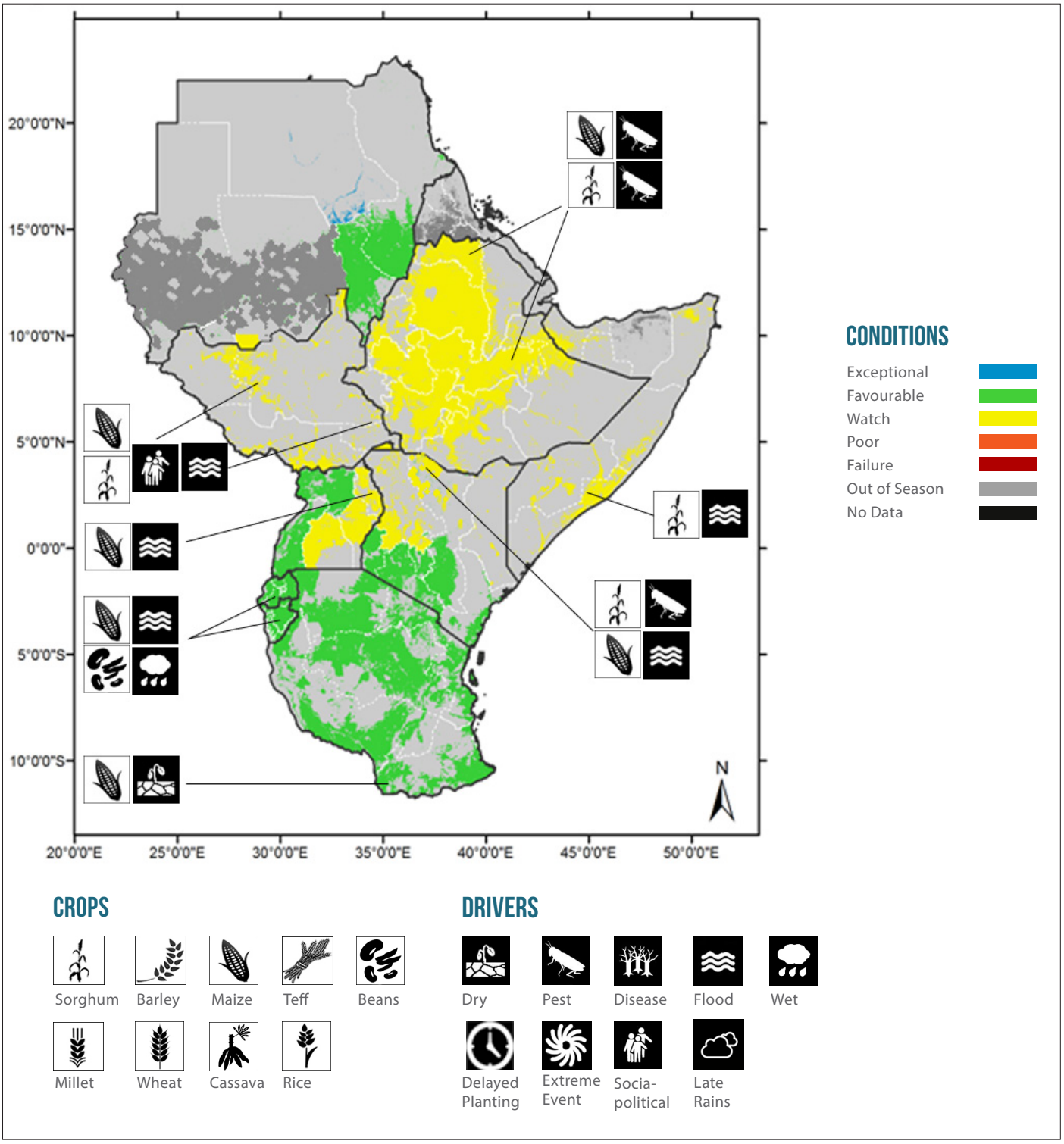
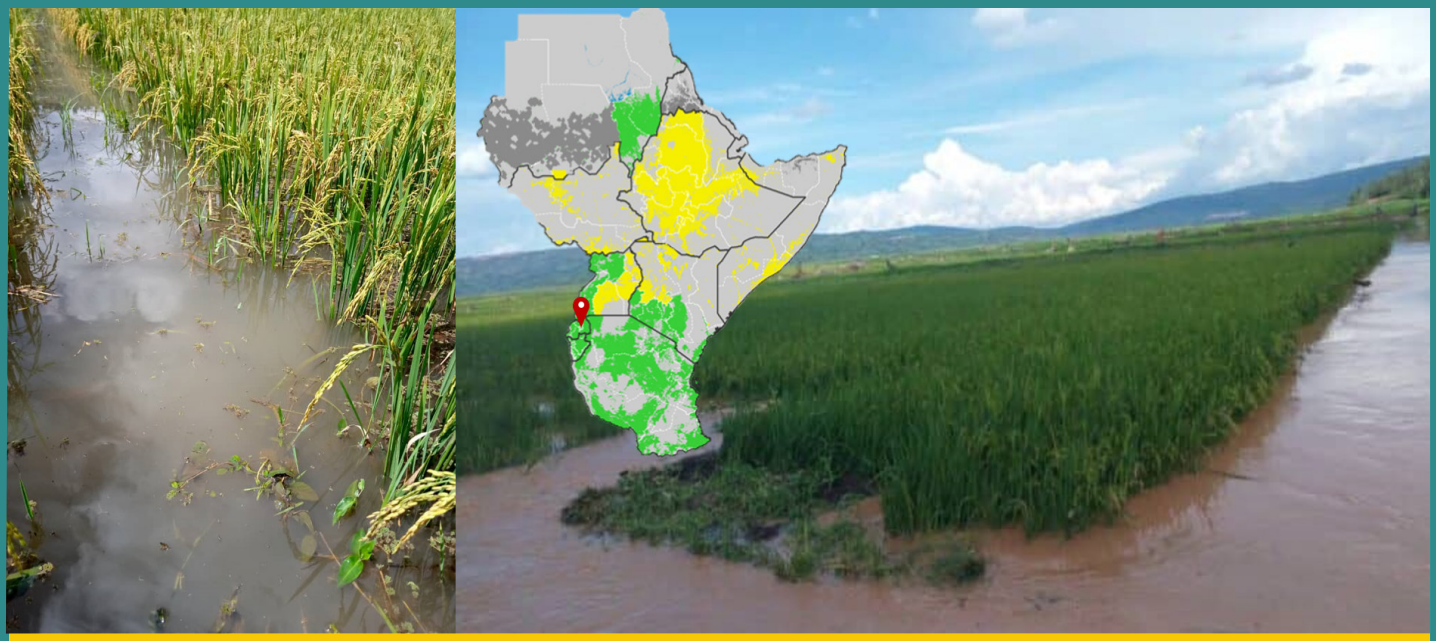
CROP CONDITIONS

The cropping season was characterized by a timely start in western parts of the equatorial region and above normal rains in northern sub-regions of Eastern Africa. Planting is expected in June for the main cereals in northern sub-regions, while crops in the equatorial and southern sub-regions are in vegetative stages and early maturity in the southern sub-region. Crops are generally in favourable condition due to above average rainfall. In some of the crop lands, excessive rainfall led to flooding in localized scale. Desert locust poses a threat to crops in high invasion zones due to vegetative crop stage coinciding with hatching and hopper development.





Flooded rice crops in field in Kirehe District, East Province Rwanda

Crops in **Burundi** season B have been favored by the above average rainfall. In late April to early May, flooding across Muyinga Commune, Ruyigi Commune, Ruuyigi Province, Bugarama Commune, and Rumonge Province caused damage and population displacement. This may affect crops grown in the area.

In **Rwanda**, Season B crops for harvesting in July have benefited from above-average rains throughout the season however abundant rains also caused flooding in many areas. Heavy rains continued into May across much of the country and particularly the North, West, and Southern provinces, triggering floods and mudslides and resulting in casualties and severe damage. Rice crops which are nearing maturity have been the most affected by the flooding as the impact has been largely over marshland areas and yield reductions are expected.

In **Kenya**, early onset of rains in February and above-average rains since March have benefited crop development for Long Rains cereals. However, abundant rains also caused flooding across many areas and have protracted the current desert locust outbreak. Since the beginning of the Long Rains season in March, 116,000 people have been displaced as flooding was reported in 36 of 47 counties and landslides occurred in the Rift Valley and central and coastal regions. Floods have impeded farm inputs and destroyed cropland in worst-affected areas. Since the beginning of May, the Tana River County has been affected by flooding. Additionally, the rising water levels of Lake Victoria is impacting Kisumu, Siaya, Busia, Migori, and Nyanza counties, and additional flooding occurred in central and western areas. The heavy rainfall has also provided favourable conditions for the further breeding of desert locusts in the centre and north, particularly in Turkana, Marsabit, Samburu, Isiolo, Laikipia, Meru, and Embu countries. Swarms are also present south of Lodwar, and there are hopper bands along the Tana River. While ground and aerial control operations are underway in the northwest, they have been slowed down by the continued heavy rainfall, flooding, and landslides. Additionally, COVID-19 related movement restrictions are causing further delays in efforts to combat locusts.

Tanzania *msimu* crops will be completed in June in the main producing southern highlands and production prospects are generally favourable due to above-average rains throughout the season despite localized flood events. Conditions are generally favourable for *Masika* crops planted in March over the bimodal cropping due to above-average March to May rains, which benefited crop development. However abundant rains also caused flooding in March and April in northeast and coastal regions of Morogoro, Mara, Manyara, Mwanza, Simiyu, Kigoma and Kilimanjaro, resulting in localized crop losses. Fall Army worm especially in Mara, Manyara, Singida and Kilimanjaro regions, are expected to result in localized crop losses.

Uganda, main season cereal crops are developing under mostly favourable conditions, except in parts of the west, central and Karamoja regions where there is continuing concern due to heavy rains and flooding. In April through the beginning of May, heavy rains and severe flooding occurred over the western and northern regions, causing damage and population displacement. In southeastern areas, due to persistent above-average rainfall, Lake Victoria water levels have risen to unprecedented levels in recent weeks and have flooded the surrounding areas, displacing local populations and resulting in regional electricity black-out. In the Kasese district (southwestern Uganda), overflows of the Nyamwamba, Mubuku, Nyamughasana, and Lhubiriha rivers continue to cause flash floods and have displaced over 100,000 people. In early May, the overflow of the Sundet and Kere Rivers caused landslides in Kween District (central-east Uganda), and in Kabale District, heavy rains collapsed the main highway to Rwanda.

In **Somalia,** production prospects are poor for Gu season cereal crops, planted in April, due to extreme rainfall triggering widespread flooding in April and May as well as the continued development of desert locusts. At the end of April through the start of May, torrential rains caused river levels to increase considerably along the Shabelle and Juba, resulting in widespread riverine flooding and flash flooding across Hiraan, Bay, Bakool, and Puntland. Belet Weyne district in Hiraan region has been one of the most affected districts following the flooding of the Shabelle river and 85 percent of Belet Weyne town and much of its' vicinity was inundated. Areas affected by the recent riverine flooding are the main maize producing regions including the lower Shabelle, which on average accounts for more than 60 percent of total maize output for the Gu season. Before March-May flooding, Gu season production was expected to be 15 to 25 percent below-average due to flooding and desert locust damage.

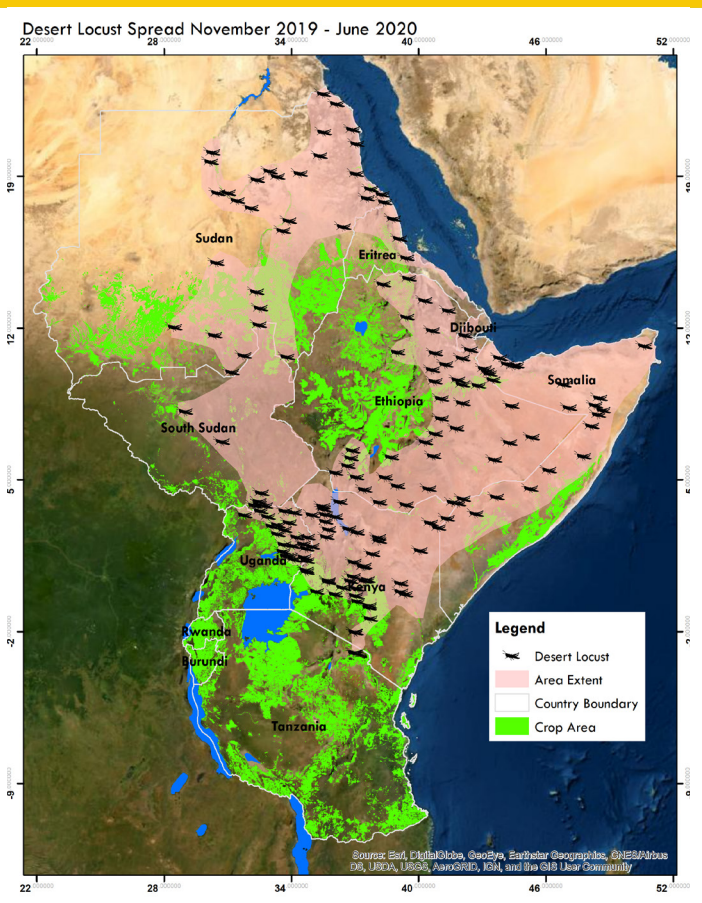
Desert Locust in Laikipia County March 2020 and Turkana County April 2020, Kenya

With the recent increase in flooding in **Somalia** *Gu* production is likely to be further reduced. Additionally, new locust swarms are developing and could cause damage to recently planted *Gu* season crops in Burao, Gebiley, Borama, Beledweyne, Luuq, Baardheere, Garbahaarey, Beled Xaawo, Doolow, Ceel Barde, Xudur, Waajid, Rab Dhuure, Buur Hakaba and Qansax Dheere. Breeding is underway in central areas of Galkayo and Galmudug and the northwest and hopper bands and groups are present on the plateau and coast near Bulhar and in the northeast near Garowe.

In **Ethiopia,** planting operations started in May for the main *Meher* season under generally favourable conditions due to good soil moisture from the above-average rains received over the previous months; however, there is continuing concern due to potential desert locust impacts. Harvesting will start in June for *Belg* season maize crops and production and yields are expected to be below-average due to reduced planted area and the ongoing desert locust outbreak that was protracted by average to above-average seasonal rains. In addition, abundant rains caused flooding since late-April in areas of Somali, Afar, SNNP, Dire Dawa, and Harari, displacing 107,000 people and causing damage to livestock and infrastructure an in early May, the overflow of the River Dawa along the Kenya-Ethiopia border resulted in devastating floods in surrounding villages. Concern remains across much of the country due to the current desert locust outbreak as breeding has increased in the Ogaden and Afar where hopper bands are present and near Dire Dawa where hopper bands and adults formed groups and swarms. Control operations are underway.

In the **Sudan,** planting is expected to start on time following early onset of rains in June, and staggered through July. Harvesting will begin in October and continue into November for main season cereals and high yield prospects are generally anticipated across rainfed areas due to forecasted abundant rainfall throughout the season. Seasonal flooding in prone areas may be reach atypical levels due to anticipated above average rains expected in River Nile basin regions of Ethiopia, Uganda and South Sudan.

In **South Sudan**, main season cereal crops are in vegetative to reproductive stage and while above-average rains have benefited crop development, there is continuing concern due to socio-economic difficulties and localized incidences of conflict. There has been several outbreaks of inter-communal violence in recent months which strains the already precarious food security situation. Furthermore, as a result of COVID-19 prevention measures, import screenings have disrupted imports from Uganda, and imports from Sudan were reduced, resulting in market price surges of main staple foods in the capital of Juba and could put upward pressure on market prices.

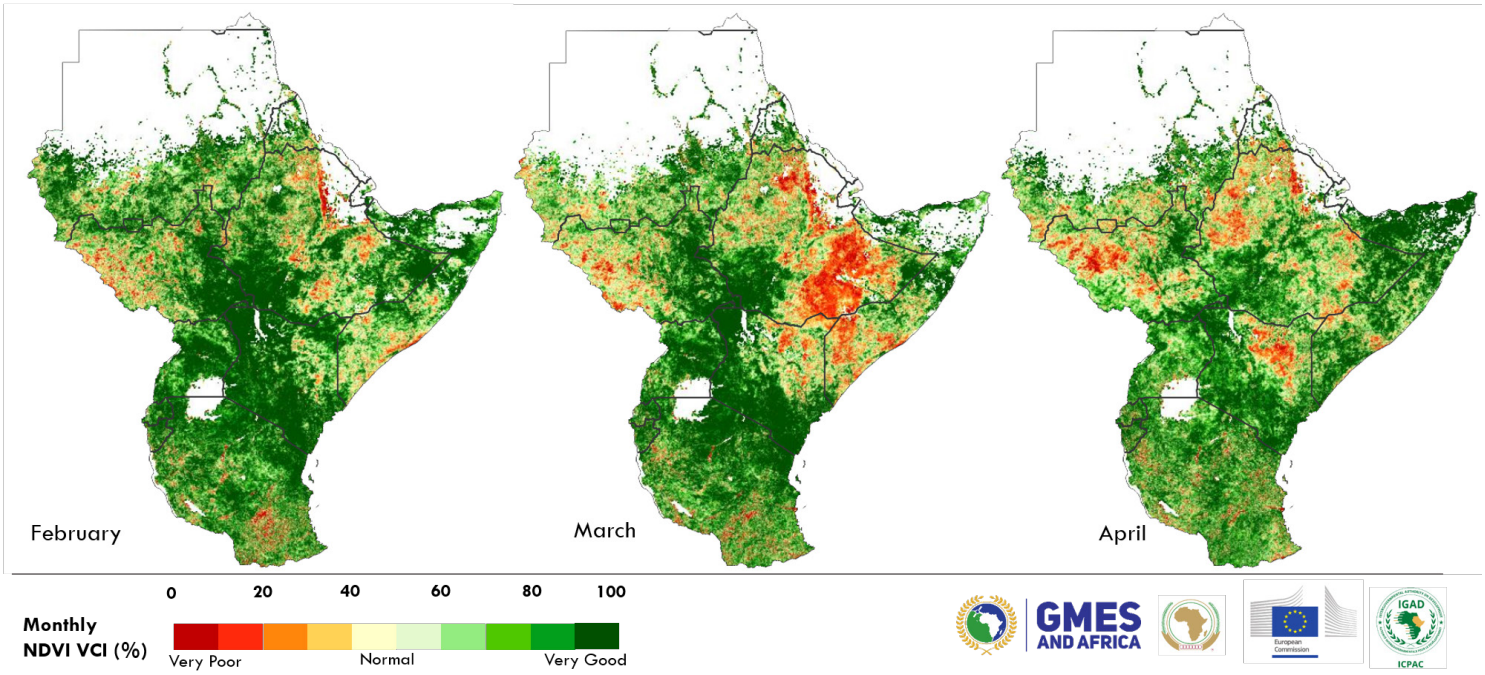


References: Regional Crop Monitor Network April, May & June Assessment
Crop Monitor for Early Warning June 2020 Edition 50
Crop Monitor East Africa Special Report - May 2020

VEGETATION CONDITIONS

Progress of Vegetation Conditions

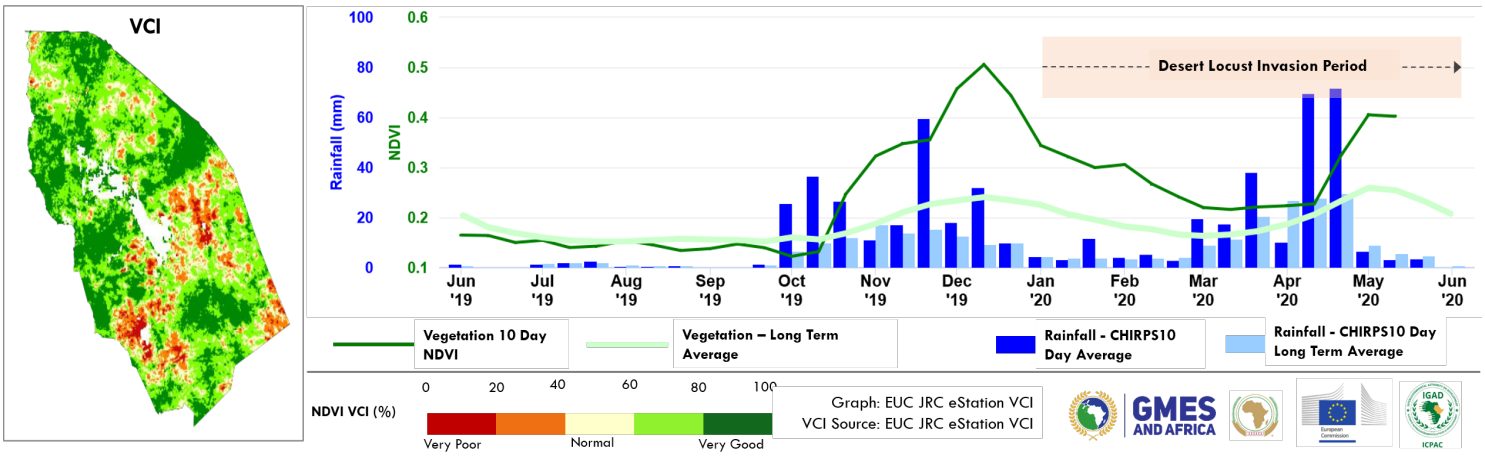
Data Source: SPOT VGT/PROBA V NDVI



Vegetation conditions show mixed conditions due to varying rainfall distribution in March to May in most parts of Eastern Africa

Monthly assessments of Vegetation Condition Index (VCI) show mixed vegetation conditions due to seasonality differences in the region. Most parts are in good to very good vegetation due to average to above average rainfall. Western parts of South Sudan have had poor vegetation conditions for consecutive months. Most parts of Amhara and Tigray regions of Ethiopia have poor to very poor conditions compared to long term or usual conditions. These areas were affected by desert locust in the first wave of invasion which affected Sorghum and Maize crops of *meher* (September - February) season. Total crop affected was about 200,000 hectares in Oromia, Tigray and Somali regions. An Area of up to 1.3 million hectares of pasture and browse were affected in Ethiopia (FAO, FEWS NET, Government of Ethiopia, WFP, Save the Children: Joint Assessment).

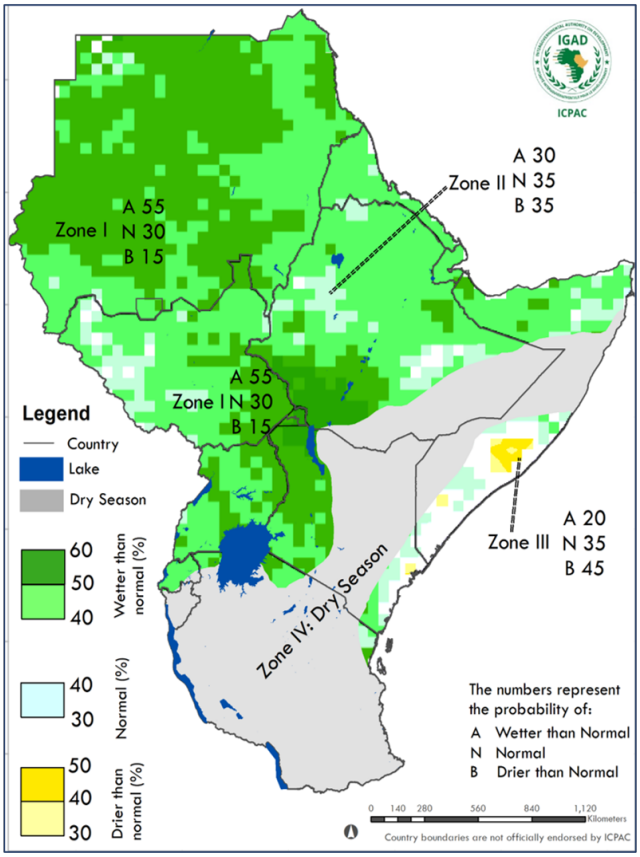
Vegetation Conditions in Marsabit-Kenya June 2019 - 2020



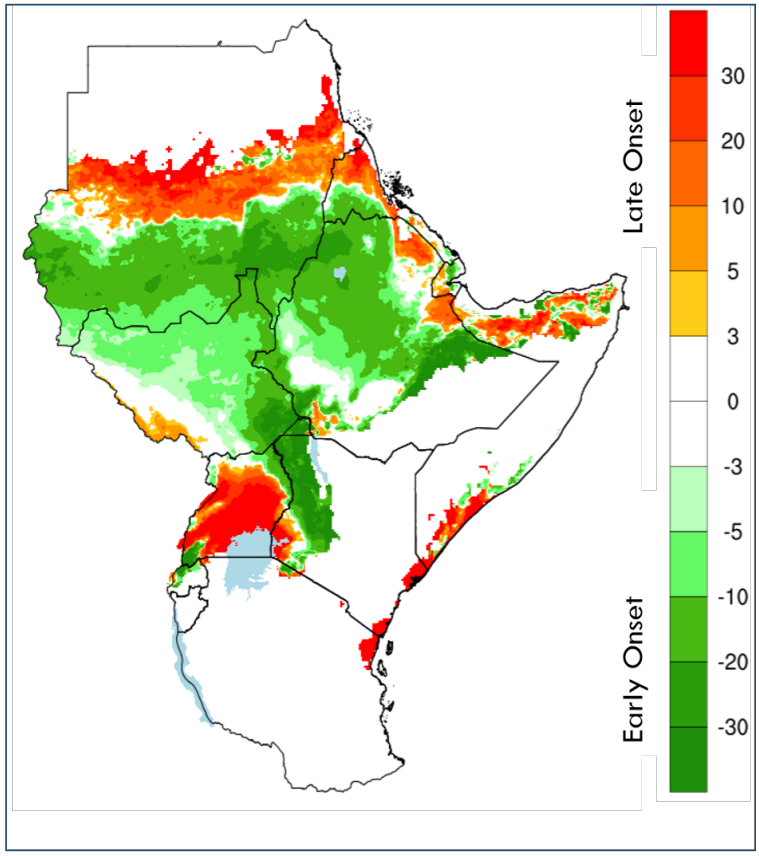
Marsabit County in northern Kenya has been one of the areas most affected by desert locust. A profile of normalized vegetation difference index shows that vegetation has been high as compared to usual conditions since October 2019. This provided ample vegetation for locust to feed leading to the invasion from the neighbouring regions of south Ethiopia and Wajir county. Current Vegetation conditions (VCI map) shows areas of poor and very poor vegetation which are likely due impacts of desert locust and floods in multiple reported locations.

SEASONAL FORECAST FOR JUNE-SEPTEMBER

Rainfall Forecast June-September



Onset Anomalies June-September



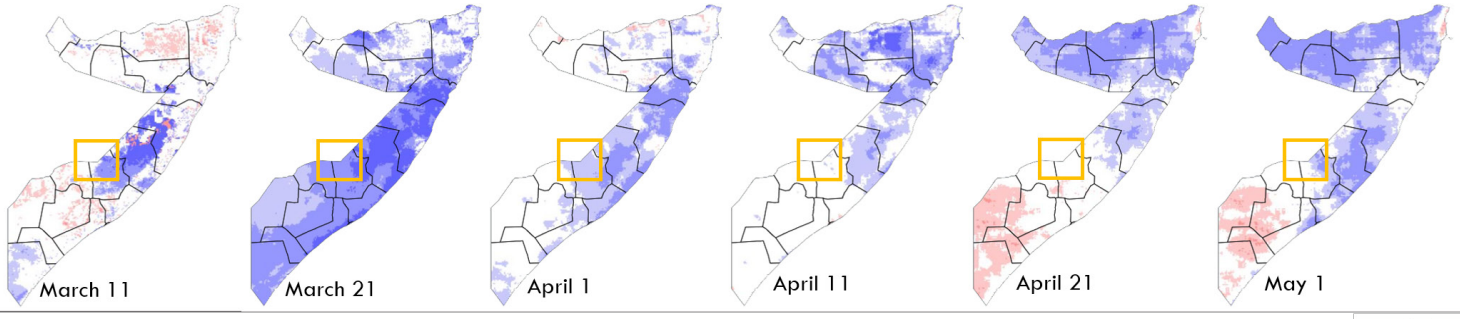
June to September is an important season for Sudan, South Sudan, Ethiopia, Eritrea, Djibouti, and Uganda. A wetter than usual season is forecast for western and central Sudan, southwestern Ethiopia, southeastern South Sudan, western Kenya, eastern and central Uganda. The rest of the region is expected to receive the usual rainfall, except for a limited area of coastal of Somalia, where less than usual rain is expected.

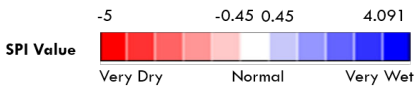
An early start of the rains is expected over central and southern Sudan, central and southeastern Ethiopia, South Sudan, southern Eritrea and western Kenya. A delayed start of the rains is expected in eastern Somalia and Ethiopia, Djibouti, northern Eritrea, northern Sudan and Uganda.

Rainfall Standardized Precipitation Index (SPI) - Somalia

IGAD ICPAC

Data Source: eStation
CHIRP Africa
JRC/MARS SPI





GMES AND AFRICA

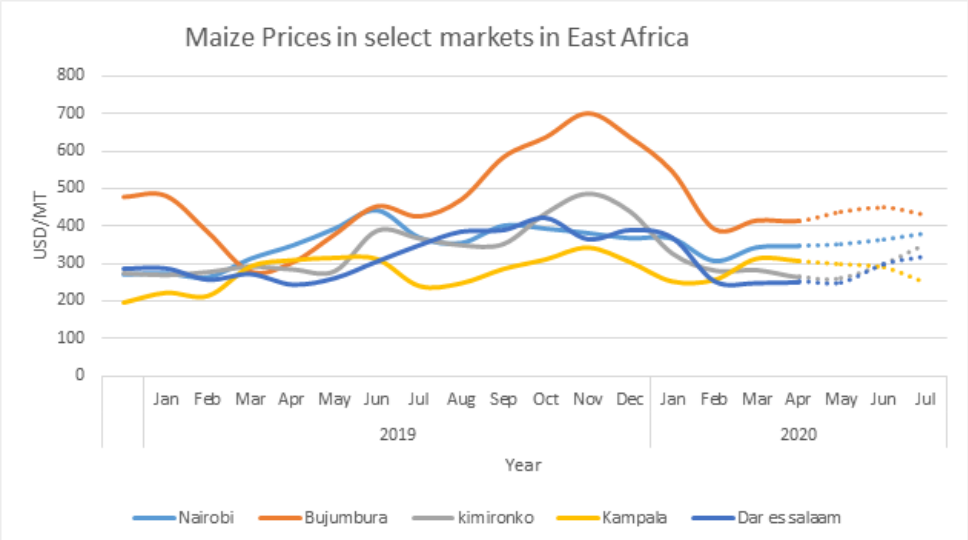
Somalia's Belet Weyne district in Hiraan region (inserted box), has been one of the most affected districts following the flooding of the Shabelle river in May. Combined with desert locust crop destruction, floods have affected maize in the high production areas of lower Shabelle.

REGIONAL GRAIN MARKETS AND TRADE

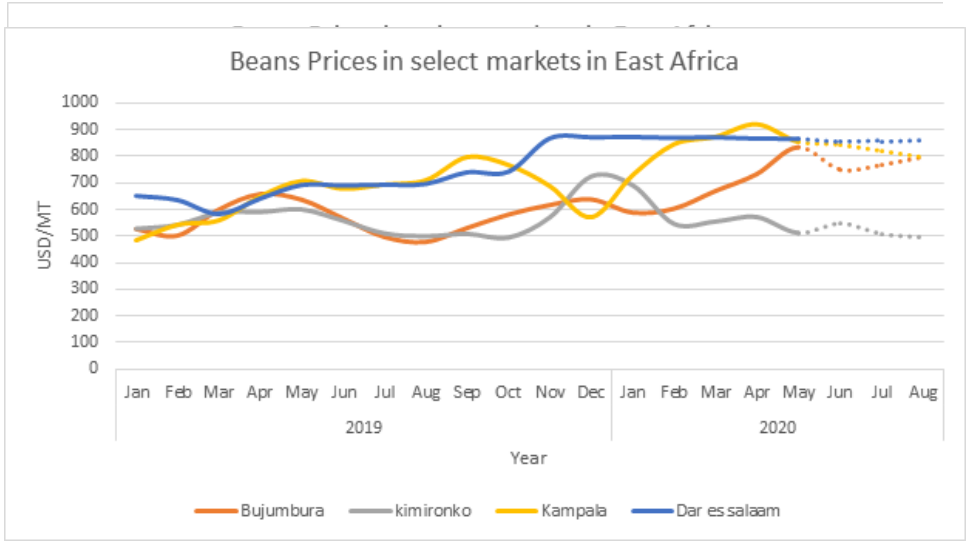
Overview

In the first quarter of the year, prices remained stable and slightly declined compared to the previous quarter, but were still above the five-year average levels. This downward trend was mostly due to adequate rainfall, which favored production and slightly improved market supplies in most markets in the region. In Kenya, market supplies have been steady with prices remaining above five-year average levels, however they have been strained by the effects of locust infestation and the ongoing covid-19 pandemic, which saw restricted movement and delays in cross-border trade. In Uganda, the unprecedented off-season rainfall has encouraged early field preparations activities by farmers for the for the March-May season, for which a favorable harvest is expected. In Tanzania, Rwanda and Burundi, heavy rainfall triggered flooding which led to destruction of crops and affected production levels. Prices remained relatively high in Rwanda despite supply from harvests and increasing imports from Tanzania.

Since March 2020, recently enacted COVID-19 control measures affected prices differently across the countries. Staple maize commodity parity price trends were near and below average across most markets. Although inflation was also high in South Sudan, increasingly high supplies from Uganda sustained typical increasing price trend that were lower than the average but still the highest in the region. In Kenya, Rwanda, Burundi, Somalia and Burundi, prices declined seasonably due to increased availability from the October-to-January harvest; and in Tanzania due to imminent and or early harvest. Prices increased typically in Uganda because of high domestic and regional demand amidst slightly below average production following pre and post-harvest losses from heavy and extended rainfall.



Projected Maize Prices in selected production markets of East Africa. Source: EAGC RATIN



Projected Beans prices in selected production markets of East Africa. Source: EAGC RATIN

Desert locust in a sorghum field in Ethiopia (FAO)

Desert locust impacted crops in Ethiopia and Somalia in the September 2019 and February 2020 season.

In Ethiopia, the first country to be invaded by first wave of the locust, an estimated 200 000 hectares of cropland have been impacted and caused a cereal loss of over 356 000 MT (FAO).

GRAIN TRADE NOTES

MAIZE

- In the first quarter of 2020, around 135,000 MT of maize was traded regionally. This was 70 percent lower than the previous quarter, which was exceptional, and slightly lower than the recent five-year average for the first quarter, but 62% higher than the first quarter of 2019.
- The previous quarter's extraordinarily high trade was occasioned by Rwanda government efforts to import maize from Tanzania to alleviate effects of stopping imports from Uganda.
- In the first quarter of 2020, Uganda and Tanzania accounted for 82% and 14% of the total regional exports respectively.
- Kenya, South Sudan and Tanzania represented 36, 32, and 22% of the total imports respectively. Uganda exports to South Sudan continued to surge and were 11% higher than exports to Kenya due to sustained relative calm in South Sudan, that has improved market functionality and widened trade routes; encouraging traders to pre-stock supplies before the deterioration of roads in the forthcoming May-to-October rainfall season.
- Exports from Tanzania to Kenya declined seasonably but were exacerbated by high levels of rejection due to aflatoxin as the maize was not yet dry enough due to early harvest and ongoing rains.

BEANS

- Approximately 82,000MT of dry beans were traded in the region in the first quarter of 2020. This was similar to the last quarter, 21% lower than 2019 first quarter but 18 percent higher than the five-year average for the first quarter.
- Uganda, Ethiopia, Tanzania and Rwanda accounted for 63, 17, 13 and 6% of the exports correspondingly, while Kenya, South Sudan, and Tanzania represented 50, 26 and8% of total imports respectively;
- Uganda exports were diverse, destined for the structural deficit markets of Kenya and South Sudan; and seasonal exports to northwestern before the increased local supplies form the ongoing harvest.
- Increased exports of dry beans from Rwanda to DRC was supported by above average harvest, in addition to restricted exports to Uganda following the border closure since March 2019.

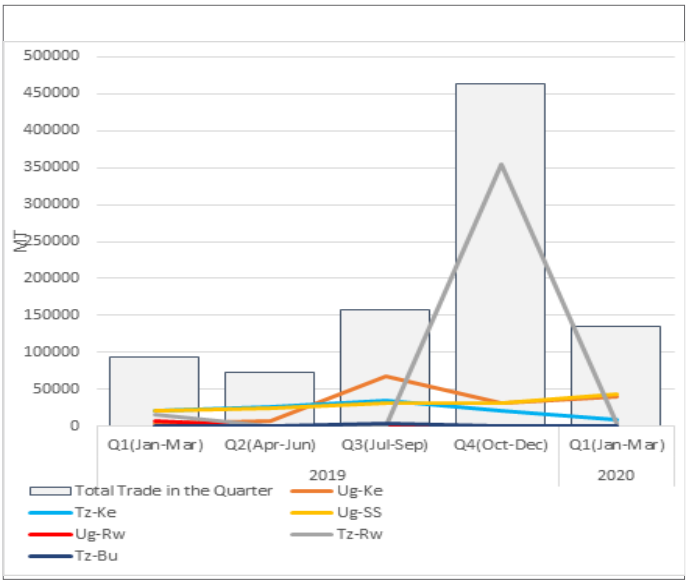


Figure 3:Quarterly Sum of Formal and Informal Cross border Trade of Maize Grain in Main Trade Corridors in Eastern Africa (2019 & 2020)
Source: EAGC RATIN and FEWSNET

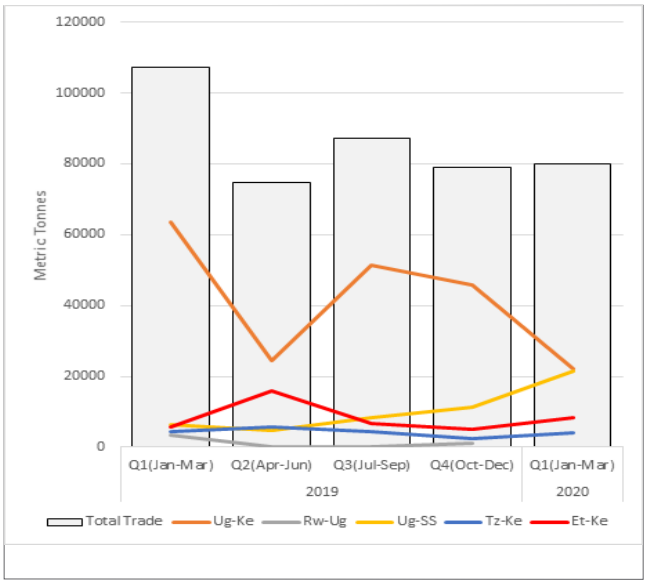


Figure 4:Quarterly Sum of Formal and Informal Cross border Trade of Beans in Main Trade Corridors in Eastern Africa (2019 & 2020)
Source: EAGC RATIN and FEWSNET

PROJECTION ASSUMPTIONS FOR CEREAL PRICES IN EASTERN AFRICA UP TO AUGUST 2020

- Prolonged COVID-19 movement restrictions on people, reduced working hours, and night curfews in many countries in Eastern Africa will likely start increasing staple food commodity prices as the supply chain efficiency faces increasing labor shortage, and slowed commodity transfer because of screenings and self-quarantines.
- Maize prices are expected to follow seasonal trends, remaining lower than last year and recent five-year average levels due to Kenya's March COVID-19 related authorization to import 360,000 MT of maize from overseas, which will cover 48 percent of the regional shortfall in the deficit countries in the region.
- There is no foreseeable Tanzania government ban on exports with permits which will likely reduce demand as prices were significantly low in 2018 and early 2019 affecting farm incomes and production; and the government wants to increase farm income.
- Maize prices are also expected to trend lower in Rwanda because of above average January harvest, in addition to expectations of another consecutive above average harvest in June because of government efforts to expand acreage and yields after imports from Uganda were stopped.
- The prices will most likely remain above last year and recent five-year average levels across key reference markets in most markets in East Africa because of unseasonably heavy rains that damaged maturing crops in the field in the main producing and exporting Uganda resulting in below average production.
- Rice prices are expected to be similar or lower than the five-year average due to increased availability from above average local harvests in Tanzania and Uganda.

MARKETS & TRADE INFORMATION PROVIDED BY EAST AFRICA GRAIN COUNCIL

WWW.RATIN.NET

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DEFINITIONS

Conditions

Exceptional: Conditions are much better than average* at time of reporting. This label is only used during the grain-filling through harvest stages.

Favourable: Conditions range from slightly lower to slightly better than average* at reporting time.

Watch: Conditions are not far from average* but there is a potential risk to final production. The crop can still recover to average or near average conditions if the ground situation improves. This label is only used during the planting-early vegetative and the vegetativereproductive stages.

Poor: Crop conditions are well below average. Crop yields are likely to be 10-25% below average. This is used when crops are stunted and are not likely to recover, and impact on production is likely.

Failure: Crop conditions are extremely poor. Crop yields are likely to be 25% or more below average.

Out of Season: Crops are not currently planted or in development during this time.

No Data: No reliable source of data is available at this time.

"Average" refers to the average conditions over the past 5 years

Drivers

These represent the key climatic drivers that are having an impact on crop condition status. They result in production impacts and can act as either positive or negative drivers of crop conditions.

Wet: Higher than average wetness.

Dry: Drier than average.

Hot: Hotter than average.

Cool: Cooler than average or risk of frost damage.

Extreme Events: This is a catch-all for all other climate risks (i.e. hurricane, typhoon, frost, hail, winterkill, wind damage, etc.)

Delayed-Onset: Late start of the season.

Pest & Disease: Destructive insects, birds, animals, or plant disease.

Socio-economic: Social or economic factors that impact crop conditions (i.e. policy changes, agricultural subsidies, government intervention, etc.)

Conflict: Armed conflict or civil unrest that is preventing the planting, working, or harvesting of the fields by the farmers.

Additional Resources for Seasonal Information:
Summary for Decision Makers: Seasonal Forecast June to September 2020 (Link)

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Prepared by members of the GEOGLAM Community of Practice, Coordinated by the IGAD Climate Prediction and Application Center

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GEO GROUP ON EARTH OBSERVATIONS

The Crop Monitor is a part of GEOGLAM, a GEO global initiative.

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HARVEST EARTH DATA FOR INFORMED AGRICULTURAL DECISIONS

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