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FOOD NEEDS ASSESSMENT PROJECT

QUARTERLY REPORT

No. I

September 14 - December 31, 1987

AID/FVA/PPM Offices

Contract No. OTR-0000-C-00-7232-00\

Food Needs Assessment Project
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(703) 525-5996

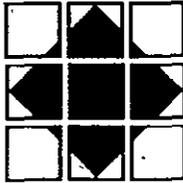
The Pragma Corporation

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Established 1977

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Countries

Africa

Benin
Botswana
Burkina Faso
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Republic
Ivory Coast
Mali
Niger
Rwanda
Sierra Leone
Uganda
Zaire
Zimbabwe
Malawi
Lesotho

Latin America

Argentina
Belize
Bolivia
Costa Rica
Ecuador
Guyana
Honduras
Mexico
Nicaragua
Panama
Paraguay
Peru

Caribbean

Antigua
Barbados
Dominica
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Haiti
Jamaica
St. Kitts/Nevis

Asia

Burma
India
Indonesia
Nepal
Pakistan
Philippines
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North Africa/ Middle East

Egypt
Jordan
Lebanon
Morocco
Tunisia
Yemen

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- B. Sudan trip report
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I. INTRODUCTION

The report is the first quarterly report of the project (No. 7383900) and covers the activities of the contractor for the last quarter of 1987. The format of the report is tentative and is expected to develop over the first year of the project to better reflect each team member's contributions.

Since the project began in mid-September, new staff members have been selected and trained. To have regular access to Food for Peace officers and resources, an office was set up in Rosslyn. In addition to these activities, a number of key tasks have been executed. This report documents these activities and is divided into eight sections.

Section III outlines the general objectives of the project followed by the list of the project staff (Section IV). Section V details the specific tasks achieved during the quarter and discusses where greater effort is required in the future. The following Section (VI) outlines some areas of concern and offers possible solutions. In Section VII, the planned activities for the first quarter of 1988 and the second quarter for the project are discussed. Finally, Section VIII contains the team members activities during this quarter. Attached to the report are some key documents including the trip reports for Sudan and Ethiopia and a list of cable communications handled by the project.

Signed *Bruce Cogill*
Bruce Cogill
Project Manager

II. SUMMARY

During the first quarter, the Food Needs Assessment Project (FNAP) achieved a number of significant accomplishments.

- o The team of three members was selected and trained, and a working and expanding relationship established with interested and key people of the Food for Peace bureau.
- o Project organization, delineation of objectives and products, and strategies were presented, discussed and agreed upon.
- o And finally, the completion of two successful trips to drought affected countries in Africa clearly demonstrated the role of the project and its contribution to both the programs of the missions and AID/Washington.

III. GENERAL OBJECTIVES

The core of the project is to provide technical assistance in food needs assessment to AID/Washington, field missions, host governments, and Private Voluntary Organizations (PVO's).

The project can be broken down into two main tasks: providing training and support for users of the existing methodology, and developing and supporting the methodology. While providing training and support takes up a large share of the project time, developing and supporting the methodology remains critical in reinforcing and upgrading the analytical capabilities of its users.

IV. PERSONNEL

The project draws on three key personnel as noted below:

| <u>Position Title</u> | <u>Name</u> |
|-----------------------|----------------------|
| Program Manager | Dr. Bruce Cogill |
| Economist | Ms. Michele McNabb |
| Economist | Mr. Jeffrey Marzilli |

with additional consultation by Mr. Asif Sheikh (within the contract), Ms. Laura Tuck (formerly with ISTI), Mr. Gary Robbins (ISTI), and others on request. As of March, 1988, it is expected that the services of Tuck and Robbins will be terminated.

V. PROJECT TASKS

There are several broad areas of the project that need to be restated to place this report into context. The training of people engaged in various aspects of food needs assessment is the primary focus of project activities. The target groups include personnel from the missions, host governments, AID/Washington, and PVO's. Other areas of project activities include rapid responses for information requested by AID/Wash in emergency situations such as drought and civil disturbances.

5.1 Training -- Trips

The primary objective of the training trips is to build analytical capabilities for missions to carry out sound, timely, and useful food needs assessments. To meet this objective, a food needs assessment (FNA) methodology has been developed and is

continuously being revised in the course of project implementation.

During the first quarter, trips were made to Sudan and Ethiopia (November) by two of the team members. Both countries are experiencing significant shortfalls in food production (refer to attached Trip Reports). Ethiopia has been the focus of considerable media and donor attention. The recently completed Food Needs Assessment by the project was timely and well received.

Both trips have generated a great deal of interest and discussion. The data collected by the assessments is being considered for a number of policy initiatives by the Food for Peace program.

5.2 Training -- Workshop

In November, 1987, the preparation for the March 7, 1988, workshop in Zimbabwe began by the team in consultation with Patricia Rader (former FVA Project Officer), Barbara Friday (ISTI conference coordinator), and FVA staff. The primary objective is to train personnel engaged in food needs assessments in the methodology as well as share their experiences. The estimated 30 participants for the week-long workshop will be drawn from 15 missions and host governments of Eastern and Southern Africa.

The workshop will enable a major revision of existing teaching materials including the manual. The tasks have been divided into four parts:

- a) Introduction to and motivation for food needs assessments,
- b) Concepts used in assessment methodologies (production, consumption, stocks and exports),
- c) Case studies or examples of applications of methodology,
- d) Commonly encountered problems with incomplete data, application of currently available software to undertake assessments, and programming food needs with the information.

5.3 Support

Successful training will largely depend on the support from AID/Washington and the AID regional offices. The need to build a team of FNA officers that work closely and effectively with the FVA/PPM staff was a primary concern during the quarter. To accomplish this a major portion of time was spent with Food for Peace officers in Washington.

An important link between the training of users of the methodology and their continued support is made by the cable traffic. During the quarter, approximately 20 percent of the time was allocated to responding to mission cables containing the assessments.

Upon receipt of a cable, careful review of the data is done, followed by updating the recently constructed data base for the specific country. Tracking of cables has been initiated by an improved filing system (including chronological and country-level

files) and "ACTION" boards which specify the person and task to be performed.

5.3.1 Regional AID Offices

Part of a successful project is the support of our efforts from the regional AID offices. For example, the Nairobi based REDSO office of USAID has staff either carrying out food need assessments or training and supporting staff in the missions stretching from Madagascar to Sudan. Contact was made with Mr. David Rhoad, Ms. Judy Beckwith, Mr. Jack Royer, and Mr. Al Smith in Nairobi to inform them of the aims of the project and the critical nature of their support. They have been actively pursued for participation on the March workshop in Zimbabwe. In addition to their participation at the Zimbabwe workshop, a team member will be visiting Nairobi in March to coordinate our efforts. Reports on countries covered by REDSO and other helpful information will be sent to them on a regular basis. It is important to continue to support their efforts by regular briefings and routing of information and data.

5.3.2 USDA

Required under the contract are quarterly reviews of the USDA publication on "World Food Needs and Availabilities". The first review took place in October and included nine countries for publication in the December report. The team carefully examined the information presented and made recommendations.

The next review is scheduled in mid-January and includes approximately 15 countries. To improve the efficiency of the review process, team members have been assigned to these countries. ERS/USDA welcomed our contribution to the process and incorporated the information from the Sudan and Ethiopia trips into their next report.

5.3.3 FAO

There are currently three main groups at FAO actively engaged in activities that complement the project: Global Information Early Warning Systems (GIEWS), the Food Aid group, and the ACC/SCN managed and UNICEF funded international monitoring of nutritional status and food security. Contacts have been made with all three groups by the team. Where specific information needs to be shared (e.g. Ethiopia and Sudan data), these contacts are integral to the outreach of the project.

5.3.4 FEWS and Others

The trips to Ethiopia and Sudan and the association with field staff of the USAID funded Famine Early Warning System (FEWS) has brought the team several contacts with the Washington arm of FEWS. The team will continue to share the information with the FEWS personnel.

Other contacts include the continuing association with the International Food Policy Research Institute, the Cornell Nutritional Surveillance Project and UNICEF personnel engaged in

monitoring child health and food security in Africa.

5.4 Administrative procedures

The project has had a rapid development and required several changes in administration. This section describes these changes.

5.4.1 Filing and Information Retrieval

A number of procedures have been enacted to improve the access to information. In addition to a filing system that tracks incoming cables, country-level files have been established to hold information. Located at the FVA offices, these files have already proved useful for the team and others.

5.4.2 Data bases

Several data bases have been either proposed or enacted. The country-level data base with data from earlier food needs assessments has been established on the computer in the FVA office. With a protect option on this data base, project staff are able to update the information based on research or information obtained from the cable traffic. It is expected that the data base will continue to be extensively used during the first quarter of 1988.

Additional data bases are proposed which include a USAID country file containing information related to different missions (staffing, etc.) and the type and extent of the training given or required.

5.4.3 Automation of project

During the first quarter, five computers and two printers, and software were purchased and installed. The three laptop computers have already been used extensively for the Sudan and Ethiopia assignments. One computer was assigned to accommodate the FVA office computer data base and the needs of the Food for Peace staff.

It is expected that in 1988, the desk-top publishing capacity of the 386 computer and dedicated line for the modem will be fully used.

5.4.4 Budget

Monthly reporting on project implementation and budget review is made to the project officer at Food for Peace. Procedures have been adopted to expedite this process and standardize the reporting. Initial expenditures for the project largely involved the computer equipment and the two trips to Africa.

VI. MAJOR PROBLEMS AND CONSTRAINTS ENCOUNTERED AND PROPOSED SOLUTIONS

This section describes the problems that have delayed or adversely affected project implementation. The discussion is meant as a focus for the problems with the view to eliminating them in subsequent quarters.

The rapid implementation of the project was partly delayed

by the lack of the third member of the team. The Chief of Party joined in December and the project has recently experienced a change in the project officer. To minimize future impact of similar changes, clear guidelines for project implementation need to be established.

A work plan, appropriate lines of communication, and reasonable reporting requirements will also be developed. In addition, mission and AID/Washington personnel will be made aware of the project activities and its potential benefits. A clear and common understanding of the capabilities of the project by people in contact with the project remains a challenge for the team members.

A clearer definition of the role of the team members needs to be discussed. By defining the roles of the members and examining these roles with respect to the work plan, the project can constructively fulfill its function. Together with the work plan and better understanding of the capabilities of the project, further discussions with Food for Peace may be necessary to reduce unrealistic expectations. Careful monitoring of the budget is necessary as costs for travel and allowances are escalating due to recent demands for the drought emergency and the impact of the decline of the dollar. Due to limitations of the operational budget, further unexpected activities will negatively impact the performance of the project.

The project has limited support staff. All typing, filing, tracking, and continuity is the responsibility of each team

member. Administrative duties impose an ever increasing demand on the teams' ability to perform its analytical and technical responsibilities. Careful review of the work load will be made during the next quarter. Appropriate remedial actions will be discussed including employing clerical support during the January through March period.

VII. PLANNED ACTIVITIES FOR THE NEXT QUARTER

The objectives of the project for its second quarter is to establish a credible presence both in Washington and with missions. Focusing on specific objectives and delivering thoughtful and relevant food needs assessments will make many of the above concerns redundant. The team is committed to working together and in cooperation with the Food for Peace staff.

The organization of the project and review of the work plan are considered to be important institutional demands and will be developed in the first quarter of 1988. Longer term demands of the project include an extensive review of the existing template, review of the manual, further development of the data bases, networking of the project with USDA, FAO, and selected universities, and preparation for TDY's to missions. Already, there appears a possibility of two TDY's for the first quarter; namely, Mozambique and possibly Malawi.

Various drafts of the work plan were distributed and discussed among the team, with FVA staff, and the home office. Further work is necessary to develop the work plan into

guidelines for all parties affected by the project. Careful attention is necessary to ensure that the time allocated to emergency situations in Africa and elsewhere is reflected in the work plan.

The upcoming workshop in Harare, Zimbabwe is expected to dominate the resources in the second quarter. The team feels that the focus for Needs Assessments training should be on concepts to enable the users to adapt the methodology to their needs. The methodology requires flexibility to incorporate the wide differences in ecology found within and across countries.

It was also recommended that training will require careful coordination with missions, regional offices, AID/Washington, and other groups involved in food needs assessments.

The focus is on countries currently affected by the drought in Africa. This is useful in assisting the effort to explain the project and its relevance to the operations of Food for Peace. The recent trips to Ethiopia and Sudan provided a critical access to the Food for Peace bureau. The detailed and thorough food needs assessments that were undertaken are currently being developed into a format to be used by analysts for policy revisions.

VIII. TEAM MEMBERS ACTIVITIES

8.1 Name: Mr. Jeffrey Marzilli and Ms. Michele McNabb
Position: Economists
Period: September - December, 1987

The format for the team member's sections is currently under revision. The following details the activities for the quarter with reference to the unplanned activities as well as some comments on the problems encountered.

8.1.1 Activities Undertaken for the Quarter

The month of October was devoted to orientation. Ms. Laura Tuck, the former project operative, returned to FVA frequently at lunch breaks and in the evenings to participate in the orientation process.

With the assistance of former FVA Project Officer, Ms. Patricia Rader, Ms. Tuck briefed the new team members on the background and evolution of the FVA methodology, the status of the Lotus template, suggestions for revisions to the template, as well as their interpretation of the goals and immediate objectives of the project. A brief outline of the history of the project on a country by country basis was also presented.

By mid-October, work was full time devoted to drought-watch countries. A week was devoted to collecting and organizing country profiles on Ethiopia and Sudan. In addition, another week of effort was directed towards preparation of comprehensive fact sheets for eight drought-watch countries in Africa. The

task of compiling the detailed profiles proved useful in establishing a system for future requests.

Towards the end of October, the team received assistance for the review of the USDA/ERS quarterly update from FVA officers, Mr. Jon O'Rourke and Mr. Gary Robbins. A great deal of effort and time was required to prepare for the USDA/ERS meeting.

Efforts throughout the USDA/ERS publication review process were focused on two objectives: 1) forging an agreement on the status of food security in the nine countries chosen for the update, and 2) negotiating an acceptable modus operandi for future AID and USDA cooperation in this Congressionally-mandated update process. Mr. Marzilli analyzed the USDA data on Ethiopia, Senegal and Niger; Ms. McNabb examined Chad, Mali and Sudan, and Mr. Robbins worked on Bangladesh, India and Egypt. Because both FVA and USDA were using the same basic data provided by the Missions, FAO, WFP and USDA, most of the discussions focused on methodological issues and analyses of the data. Major issues were summarized in a memo to Dr. Nightingale at USDA/ERS.

During the months of September and October, the project also began the process of moving into its new office in Rosslyn and getting the project physically "up to speed". The relocation included transferring files and setting up computer hardware.

Early November was reserved almost entirely for preparation of the TDY's to Ethiopia and Sudan. Previous assessments and reports were collected and studied, technical information updated, and several evening meetings arranged with Ms. Laura

Tuck to discuss issues peculiar to food security and the assessment process in Ethiopia and Sudan (trip reports attached). Contacts were developed and information exchanged with country analysts and analysts at the Famine Early Warning System Project (FEWS), USDA/ERS, and AID/W. FAO Rome country analysts and GIEWS staff were contacted and plans made for several days of informal meetings in Rome in early December.

The team spent the last two weeks in November and the first week in December on TDY in Sudan and Ethiopia. Additional meetings in Rome with FAO/GIEWS staff were also undertaken.

Ms. McNabb stopped in Nairobi on the way to Sudan for meetings with REDSO. She met briefly with REDSO Food for Peace officers, Mr. David Rhoad and Ms. Judy Beckwith, to discuss general coordination between the FNAP and REDSO, and the situation in Sudan. During her two week stay in Khartoum, the major activities were (1) completing the 1987/88 Food Needs Assessment and updating the five year historical data; and (2) training mission, host government and EEC personnel in the FNA methodology. Each of the activities occupied approximately one week. Ms. McNabb returned to Nairobi to continue meetings with REDSO and discussed her findings from the Sudan trip. Upon return to Washington, a number of de-briefing sessions were arranged with Food for Peace officers, State Department, Africa Bureau of AID, FEWS personnel, and USDA staff. The data generated by the TDY on Ethiopia has markedly improved the visibility of the project and is currently being analyzed by

FVA/PPM staff for a number of policy initiatives. In addition, the food needs assessment was used in discussion with FVA staff to assist its officers in understanding the methodology. From these discussions, many useful suggestions were made to present the information generated by the assessments more efficiently. The first step has been made in the construction of a country profile on Ethiopia.

While most of the time in December was involved in preparing, analyzing, and discussing the TDY output, some time was also allocated in providing assistance for the formulation of the Work Plan, reviewing the workshop materials, making suggestions on the template and manual, and preparing the case studies to be used in future training of users of the methodology.

8.2 Name: Dr. Bruce Cogill
Position: Project Manager
Period: November 15 - December, 1987

8.2.1 Status of activities planned for the quarter

The position of Project Manager was not filled until mid-November. The commencement of employment coincided with the departure of the first Project Officer and the departure of the team members on a four week trip. Fortunately, briefing and initial assistance were provided by the new Project Officer and others familiar with the project.

In addition to familiarization with the history and future of the project, the period was also devoted to preparing the materials for the workshop in Zimbabwe, drafting a work plan, and learning the administrative procedures.

Meetings with Food for Peace Officers were useful in not only learning of their operations but their perspective on how best the project can assist them. Time was also devoted to learning the methodology and comparing it with the USDA/ERS approaches. Many of the communications procedures were standardized and files established to track mission cable traffic.

8.2.2 Unplanned activities for the quarter

There were no unplanned activities given the short duration.

8.2.3 Comments and special problems encountered

The timing of the trips for the team members and the transfer of the longstanding project officer for the project affected the initial introduction to the project. Nevertheless, the new acting project officer and other FVA officers were helpful. The material on the project was made available as well as the administrative support of the home office.

The need for a coordinated team to effectively carry out the objectives of the contract is well established. The efforts towards this end require a clearer understanding of the scope of the project. The resources of the project need to be carefully considered to fully use the talent and capability of all the team members.

8.2.4 Conclusion

The project provides an opportunity for exceptional professional growth. The broad objectives of the contract enable us the flexibility to meet the various needs of the Food for Peace Bureau. By careful management of the resources, it is possible that we can firmly establish the project as a cost effective tool in carrying out food aid programs.

Att. A

MEMO

Date: 18 December 1987

To: Barry Riley, FVA/PPM

From: Gary Robbins

Subject: Food Needs Assessments

Thru: Bruce Cogill

Below is a list of countries in AFR, ANE and LAC which either cabled in food needs assessments, or have received requests from us to do assessments but have not yet responded. The Sudan assessment has not been cabled in, but was telexed in by Michele during her trip to Sudan.

Examples of good assessments include Burkina Faso, Mali, Chad, Ethiopia, Sudan and Dominican Republic. The Chad assessment is particularly good, and we may use it as teaching tool at the Harare conference. Unfortunately, the bad examples outnumber the good. Some of the poorer assessments are just a matter of good data not being available to the missions, or the missions not having a commitment to doing good assessments. As we continue our ongoing dialogue with missions which are committed to doing good assessments, the quality of their assessments will improve.

| Country | Date of Analysis | Period analysis covers | | Note |
|---------|------------------|------------------------|----|------|
| | | From | To | |

AFRICA

First Quarter FY 88

| | | | | |
|------------|-----------|-----------|-------------|---|
| Ethiopia | 11-Dec-87 | 01-Jan-88 | 31-Dec-88 | 2 |
| Sudan | 03-Dec-87 | 1987 | 1988 | 5 |
| Somalia | 07-Dec-87 | 01-Oct-87 | 30-Nov-88?? | 1 |
| Niger | 27-Nov-87 | 1987 | 1988 | 1 |
| Chad | 25-Nov-87 | 01-Nov-87 | 31-Oct-88 | 2 |
| Mali | 20-Nov-87 | 1987 | 1988 | 1 |
| Mauritania | 18-Nov-87 | NA | NA | 1 |
| Cameroon | 05-Nov-87 | 1987 | 1988 | 1 |
| Zaire | 05-Nov-87 | NA | NA | 1 |
| Madagascar | 31-Oct-87 | 01-Jan-87 | 31-Dec-87 | 1 |
| Burkina | 26-Oct-87 | 01-Oct-87 | 30-Sep-88 | 2 |
| Guinea | 23-Oct-87 | 01-Jan-87 | 31-Dec-87 | 3 |
| Cape Verde | 15-Oct-87 | NA | NA | 3 |

Fourth Quarter FY 87

| | | | | |
|-----------|-----------|-----------|-----------|---|
| Rwanda | 01-Aug-87 | 01-Jan-87 | 31-Dec-87 | 5 |
| Swaziland | 31-Jul-87 | NA | NA | 5 |

Third Quarter FY 87

| | | | | |
|----------|-----------|-----------|-----------|---|
| Kenya | 10-Jun-87 | 01-Jul-87 | 30-Jun-88 | 5 |
| Zimbabwe | 08-Jun-87 | 01-Apr-87 | 31-Mar-88 | 5 |
| Lesotho | 28-May-87 | 01-Jul-87 | 30-Jun-88 | 5 |
| Liberia | 13-Mar-87 | 01-Oct-86 | 30-Sep-87 | 4 |
| Zambia | 09-Mar-87 | 01-Oct-86 | 30-Sep-87 | 5 |
| Ghana | 01-Mar-87 | 01-Jan-87 | 31-Dec-87 | 4 |

Second Quarter FY 87

| | | | | |
|--------------|-----------|-----------|-----------|---|
| Senegal | 29-Jan-87 | 01-Nov-86 | 31-Oct-87 | 4 |
| Sierra Leone | 16-Jan-87 | 01-Jan-86 | 31-Dec-86 | 4 |

First Quarter FY 87

| | | | | |
|------------|-----------|-----------|-----------|---|
| Togo | 16-Dec-86 | NA | NA | 4 |
| Eq. Guinea | 09-Dec-86 | NA | NA | 4 |
| Burundi | 05-Dec-86 | 01-Oct-86 | 30-Sep-87 | 5 |
| Benin | 01-Dec-86 | 01-Jan-86 | 31-Dec-86 | 4 |
| Botswana | 01-Dec-86 | 01-Jan-86 | 31-Dec-86 | 5 |
| CAR | 01-Dec-86 | 01-Jan-86 | 31-Dec-86 | 4 |
| Mauritius | 28-Nov-86 | NA | NA | 5 |
| Tanzania | 10-Nov-86 | NA | NA | 5 |
| Sao Tome | 01-Sep-86 | 01-Jan-86 | 31-Dec-86 | 4 |

No Analysis

| | | | | |
|---------------|-------------|-----------|-----------|---|
| Uganda | NO ANALYSIS | NA | NA | 5 |
| Seychelles | NO ANALYSIS | NA | NA | 5 |
| Mozambique | NO ANALYSIS | 01-Jan-87 | 31-Dec-87 | 5 |
| Malawi | NO ANALYSIS | NA | NA | 5 |
| Guinea Bissau | NO ANALYSIS | NA | NA | 4 |
| Gambia | NO ANALYSIS | NA | NA | 4 |
| Congo | NO ANALYSIS | NA | NA | 5 |
| Comoros | NO ANALYSIS | NA | NA | 5 |

ANE-----
First Quarter FY 88

| | | | | |
|-------------|-----------|-----------|-----------|---|
| SKI LANKA | 01-Dec-87 | 01-Nov-87 | 30-Sep-88 | 1 |
| PHILIPPINES | 28-Oct-87 | 01-Jul-87 | 30-Jun-88 | 1 |
| BURMA | 19-Oct-87 | 01-Dec-86 | 30-Nov-87 | 1 |
| INDONESIA | 15-Oct-87 | 01-Jan-87 | 31-Dec-87 | 1 |
| JORDAN | 14-Oct-87 | 01-Jan-87 | 31-Dec-87 | 1 |

LAC-----
First Quarter FY 88

| | | | | |
|---------|-----------|-----------|-----------|---|
| DOM REP | 09-Dec-87 | 01-Jan-87 | 31-Dec-87 | 2 |
|---------|-----------|-----------|-----------|---|

Notes

1. A recent assessment has been received from the mission and the team is analyzing the data and preparing a response, if needed.
2. Analysis has been done by the mission and no further clarification is necessary.
3. An analysis has been sent in by the mission and the team has cabled questions. Awaiting a response from the mission.
4. A request for an analysis has been sent to the mission, but no response has been received yet.
5. A request for an analysis will be sent at harvest time, which will be in the next few months.

cc: Jon O'Rourke, FVA/PPM

18 December 1987

SUDAN TRIP REPORT
Food Needs Assessment (FNA) Project
November 22-December 5
Michele McNabb

The TDY was scheduled in conjunction with Khartoum visit of the Food Sector Strategy team (Barry Riley and Charlie Ward). Previous FNA's had been conducted in Sudan in early 1986 and early 1987, although no ongoing update procedure existed in the Mission.

Initially, there was some question about which office should undertake the Food Needs Assessment. Little or no advance planning had been done due to the relatively short notice of the TDY and the large number of other TDYs scheduled at same time. I was told that the FEWS coordinator would assume responsibility for updating the assessment after the TDY. Because FEWS was attached to the General Development Office, I worked mainly through that office. It became obvious that much of the relevant data for the assessment would come from the USAID Agricultural Planning and Statistics Project (APSP) at the Ministry of Agriculture. This project is managed by the ADO, Sharon Fee. There was a high level of interest in the assessment at APSP; however, a week-long strike started the day after the TDY began.

Due to the strike, most of the first week was spent conducting the 1987/88 assessment and updating the historical data. The second week focussed on training at the Mission and at the APSP. The results of the 1987/88 assessment are presented below, followed by a description of the training conducted and recommendations and observations for follow-up activities.

The 1987/88 Food Needs Assessment Results.

The general conclusion reached by the assessment is that although gross sorghum production might be as much as 60 percent lower than last year, in-country stocks could meet the sorghum shortfall on a national level. An additional 180,000 metric tons of wheat (above current US Title I commitments) are required and more than 170,000 tons of millet or substitutes will be necessary.

Due to the situation in Southern Sudan, two analyses were conducted: one including the south and one excluding the three southern regions. The two analyses were undertaken because it is assumed that little or no surplus production from the north moves into the south and that no imports into the north will be used to meet deficits in the south. Also, per capita consumption of the five crops included in the assessment (sorghum, millet, wheat, maize and rice) is much lower than in the south than the north. For the nation as a whole, per capita consumption of the five

crops is only 116 kilograms per year. When the south is excluded, per capita consumption rises to 152.7 kilograms in 1987/88, a figure comparable to FAO and other estimates.

Although excluding the south greatly influences per capita consumption, it does not change the total food balance significantly. While the population of the south is nearly 25% of the total population, over the past seven years the south has produced less than 5% of the sorghum and millet grown in the country. The results of the two analyses are summarized in Table 1; the complete 1987/88 results are included as Table 2 and Table 3.

=====

TABLE 1
(all values in milled metric tonnes)

| | NATIONAL ANALYSIS | NORTH ONLY ANALYSIS |
|-----------------------------------|----------------------|------------------------|
| Population | 24,402,000 | 18,302,000 |
| Per Capita Req.: | | |
| Sorghum | 75.7 | 101.0 |
| Millet | 11.1 | 14.3 |
| Wheat | 26.5 | 35.5 |
| Maize | 2.1 | .1 |
| Rice | .6 | 0 |
| Net Dom. Production | | |
| Sorghum | 1,158,143 | 1,115,132 |
| Millet | 108,784 | 108,782 |
| Wheat | 104,360 | 104,360 |
| Maize | 4,992 | 1,915 |
| Rice | 5,056 | 0 |
| Net Deficit | | |
| Sorghum | (156,057) | (113,046) |
| Millet | 161,117 | 153,170 |
| Wheat | 146,054 | 149,322 |
| Maize | 4,992 | 0 |
| Rice | 10,066 | 0 |
| Total Deficit - Sorghum Equiv. | 151,346 | 203,334 |

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The accuracy of the government data on the south is impossible to assess. Although the "bottom line" does not differ significantly between the two assessments, using the data from the North Only tables is recommended.

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| RESULTS FOR | 1988 | | | | | | 15-Dec-87 |
|--|-----------|---------|---------|--------|--------|-----------|-----------|
| Population (thousands) | 24,402 | | | | | | |
| | SORGHUM | MILLET | WHEAT | MAIZE | RICE | TOTAL | |
| Per Capita Requirement - Milled (kg/yr) | 75.7 | 11.1 | 26.5 | 2.1 | 0.5 | 116.0 | |
| Total Food Need - Milled (tonnes) | 1,848,086 | 269,900 | 646,014 | 51,140 | 15,122 | 2,830,262 | |
| Gross Domestic Production - Unmilled (tonnes) | 1,454,040 | 130,530 | 175,000 | 25,000 | 10,000 | 1,794,570 | |
| Seed Saved - Unmilled (tonnes) | 43,621 | 2,611 | 22,500 | 1,600 | 700 | 71,032 | |
| Waste, Feed, and Industrial Use - Unmilled (tonnes) | 123,593 | 7,049 | 22,050 | 2,125 | 1,400 | 156,217 | |
| Net Domestic Production - Unmilled (tonnes) | 1,286,825 | 120,871 | 130,450 | 21,275 | 7,900 | 1,567,321 | |
| Milling Losses (tonnes) | 128,683 | 12,087 | 26,090 | 2,128 | 2,844 | 171,831 | |
| Net Domestic Production - Milled (tonnes) | 1,158,143 | 108,784 | 104,360 | 19,148 | 5,056 | 1,395,490 | |
| Total Stocks - Milled (tonnes) | 1,161,000 | 0 | 100,000 | 0 | 0 | 1,261,000 | |
| Official Food Exports - Milled (tonnes) | 135,000 | 0 | 0 | 0 | 0 | 135,000 | |
| Unofficial Food Exports - Milled (tonnes) | 180,000 | 0 | 0 | 0 | 0 | 180,000 | |
| Domestic Food Supply - Milled (tonnes) | 2,004,143 | 108,784 | 204,360 | 19,148 | 5,056 | 2,341,490 | |
| Import Requirement - Milled (tonnes) | (156,057) | 161,117 | 441,654 | 31,992 | 10,066 | 488,772 | |
| Official Commercial Food Imports - Milled (tonnes) | 0 | 0 | 295,600 | 0 | 0 | 295,600 | |
| Unofficial Commercial Food Imports - Milled (tonnes) | 0 | 0 | 0 | 27,000 | 0 | 27,000 | |
| Food Deficit by Commodity - Milled (tonnes) | (156,057) | 161,117 | 146,054 | 4,992 | 10,066 | 156,172 | |
| Food Deficit by Commodity - Unmilled (tonnes) | (173,397) | 179,018 | 182,568 | 5,547 | 15,728 | 209,464 | |

| RESULTS IN MILLED BASE COMMODITY EQUIVALENT TERMS FOR | 1988 |
|---|-----------|
| Report date: | 15-Dec-87 |
| Base Commodity: | SORGHUM |
| Per Capita Requirement (kg/yr) | 116.3 |
| Total Food Need (tonnes) | 2,837,839 |
| Food Supply: | |
| Net Production (tonnes) | 1,402,620 |
| Total Stocks (tonnes) | 1,264,637 |
| Official Exports (tonnes) | 135,000 |
| Unofficial Exports (tonnes) | 180,000 |
| Total | 2,352,257 |
| Import Requirement (tonnes) | 485,582 |
| Official Food Imports -or- Import Capacity (tonnes) | 306,351 |
| Unofficial Food Imports (tonnes) | 27,885 |
| Food Deficit (tonnes) | 151,346 |

BASE CASE ASSUMPTIONS - NATIONAL ANALYSIS

- 1987/88 per capita consumption is based on the AVERAGE consumption over the past five years. As a result, per capita consumption in 1987/88 is significantly lower than the past two years but not as low as the drought years.
- Sorghum production = 1.34 million mt
- Unofficial sorghum exports = 200,000 mt
- Stocks available for consumption:
 - Gov't. stocks = 576,000 mt (unmilled)
 - Private stocks = 450,000 mt (unmilled)
 - On-farm stocks = 300,000 mt (unmilled)

TOTAL 1,193,000 mt milled
- 20% government stocks unfit for human consumption

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Table 3

B.4

| RESULTS FOR | 1988 | | | | | | 15-Dec-87 |
|--|-----------|---------|---------|-------|------|-----------|-----------------------|
| Population (thousands) | 18,302 | | | | | | |
| | SORGHUM | MILLET | WHEAT | MAIZE | RICE | TOTAL | |
| Per Capita Requirement - Milled (kg/yr) | 101.0 | 14.3 | 35.5 | 0.1 | 0.0 | 150.9 | |
| Total Food Need - Milled (tonnes) | 1,848,086 | 261,952 | 649,282 | 1,915 | 0 | 2,761,235 | |
| Gross Domestic Production - Unmilled (tonnes) | 1,400,040 | 130,528 | 175,000 | 2,500 | 0 | 1,708,068 | |
| Seed Saved - Unmilled (tonnes) | 42,001 | 2,611 | 22,500 | 160 | 0 | 67,272 | |
| Waste, Feed, and Industrial Use - Unmilled (tonnes) | 119,003 | 7,049 | 22,050 | 213 | 0 | 148,314 | |
| Net Domestic Production - Unmilled (tonnes) | 1,239,035 | 120,869 | 130,450 | 2,128 | 0 | 1,492,482 | |
| Milling Losses (tonnes) | 123,904 | 12,087 | 26,090 | 213 | 0 | 162,293 | |
| Net Domestic Production - Milled (tonnes) | 1,115,132 | 108,782 | 104,360 | 1,915 | 0 | 1,330,189 | |
| Total Stocks - Milled (tonnes) | 1,161,000 | 0 | 100,000 | 0 | 0 | 1,261,000 | |
| Official Food Exports - Milled (tonnes) | 135,000 | 0 | 0 | 0 | 0 | 135,000 | |
| Unofficial Food Exports - Milled (tonnes) | 180,000 | 0 | 0 | 0 | 0 | 180,000 | |
| Domestic Food Supply - Milled (tonnes) | 1,961,132 | 108,782 | 204,360 | 1,915 | 0 | 2,276,189 | |
| Import Requirement - Milled (tonnes) | (113,046) | 153,170 | 444,922 | 0 | 0 | 485,047 | |
| Official Commercial Food Imports - Milled (tonnes) | 0 | 0 | 295,600 | 0 | 0 | 295,600 | |
| Unofficial Commercial Food Imports - Milled (tonnes) | 0 | 0 | 0 | 0 | 0 | 0 | |
| Food Deficit by Commodity - Milled (tonnes) | (113,046) | 153,170 | 49,322 | 0 | 0 | 189,447 | |
| Food Deficit by Commodity - Unmilled (tonnes) | (25,607) | 170,189 | 86,653 | 0 | 0 | 282,335 | |
| RESULTS IN MILLED BASE COMMODITY EQUIVALENT TERMS FOR ---> | | | | | | | |
| Report date: | 1988 | | | | | | |
| Base Commodity: | SORGHUM | | | | | | |
| Per Capita Requirement (kg/yr) | 152.7 | | | | | | SCENARIO : -- |
| Total Food Need (tonnes) | 2,794,260 | | | | | | NORTHERN SUDAN ONLY |
| Food Supply: | | | | | | | BASE CASE ASSUMPTIONS |
| Net Production (tonnes) | 1,334,938 | | | | | | |
| Total Stocks (tonnes) | 1,264,637 | | | | | | |
| Official Exports (tonnes) | 135,000 | | | | | | |
| Unofficial Exports (tonnes) | 180,000 | | | | | | |
| Total | 2,284,575 | | | | | | |
| Import Requirement (tonnes) | 509,685 | | | | | | |
| Official Food Imports - Import Capacity (tonnes) | 306,351 | | | | | | |
| Unofficial Food Imports (tonnes) | 0 | | | | | | |
| Food Deficit (tonnes) | 293,334 | | | | | | |

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Three important points must be highlighted:

(1) Internal movements of food from the major sorghum producing regions and storage sites in the east to the drought-stricken areas of the west will be THE critical issue. The precarious situation in the West, especially Northern Darfur and North Kordofan, is further threatened by the poor millet crop on which many traditional farmers depend.

(2) Both the Base Case and the Northern Sudan Only assessment use "normal" or "status quo" per capita consumption figures, i.e., the average per capita consumption over the past five years, adjusted for current population. Per capita consumption increased significantly during the past two years because of the record sorghum harvests (see Graph 1 and 2). Using the five-year "average" consumption figure, the years of relatively low per capita consumption (1984/85 and 1983/84) are included.

(3) The assessment assumes that the government will start the 1988/89 season with no food stocks, while private traders' and farmers' stocks will be very low. The implications of this major drawdown could be extremely serious if next years' harvest is poor.

With these caveats in mind, the situation by crop is discussed below.

Sorghum. The current projections from the Ministry of Agriculture, Ag. Statistics Division, are for total sorghum production to be 1.45 million metric tons (1.40 in the North). Graph 3 shows the dramatic fluctuations in sorghum production over the past five years. This year's low production level is due to a 30% decrease in area planted and a 35% decrease in yields. Last year's low sorghum prices, plus this year's drought, pests and lack of inputs, all contributed to the decreases.

The mechanized and traditional rainfed sectors will suffer the largest declines in production. Yields in the irrigated sector will be as high as last year, but area planted was down by 20%. The assessment assumed that 150,000 tonnes of sorghum will be exported officially. This was the amount the government said it would export to fulfill contract commitments after the ban was announced. In addition, 200,000 mt of sorghum are included as illegal exports, moving into Ethiopia and Chad where higher prices are reported.

Millet. In many ways, millet may be the most severe problem. As mentioned, most of the millet production (60-70%) comes from the traditional rainfed regions in the West. With total production of millet at only 130,000 mt, it can be assumed that the majority of the 170,000 mt millet deficit is in the

drought-stricken western provinces.

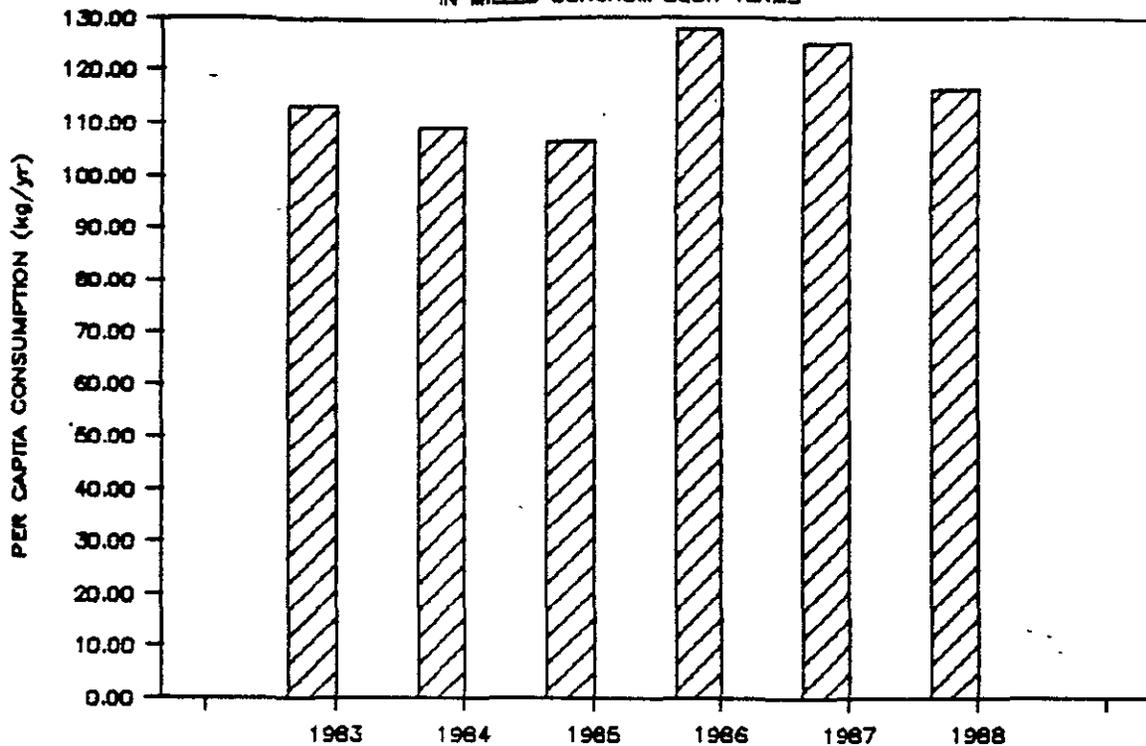
Wheat. Wheat production may be up slightly from last year. The area planted on the Gezira Scheme (65-75% of total production) is up from last year, although yields are projected to be down slightly due to shortages of water and fertilizer. As Graph 4 shows, the real issue with wheat is not domestic production (it has varied relatively little over the past five years) but commercial and food aid imports. Per capita consumption of wheat has fluctuated widely according to the amount imported (see Graph 4). It is generally assumed that there is a large unmet demand for the cheap wheat bread- whatever is available will be consumed. Most of the country's mills are running at near capacity; large increases in imports would have to be in wheat flour.

Stocks. The Agricultural Bank of Sudan says it has 720,000 mt of sorghum in storage. Of this total, half is buried underground, the remainder is divided between silos and warehouses. Although the ABS claims its losses will be minimal, other sources estimate losses to be as high as 30%. In addition to reports of inadequate preparation of the underground stores, the contents of several warehouses are rumored to be bad. The assessment used the assumption that 20% of total government stocks are not available for consumption.

The ABS estimates that 450,000 mt of private trader stocks will be available for consumption this year. They say 450,000 mt is a conservative estimate of total private stocks - any stocks above that amount can be carry over stocks for 1988/89. Similarly, the assessment assumes 300,000 tonnes of on-farm stocks will be available for consumption this year. The underlying assumption is that stocks are somewhat above 300,000 mt, the balance would be a buffer for next year.

Graph 1

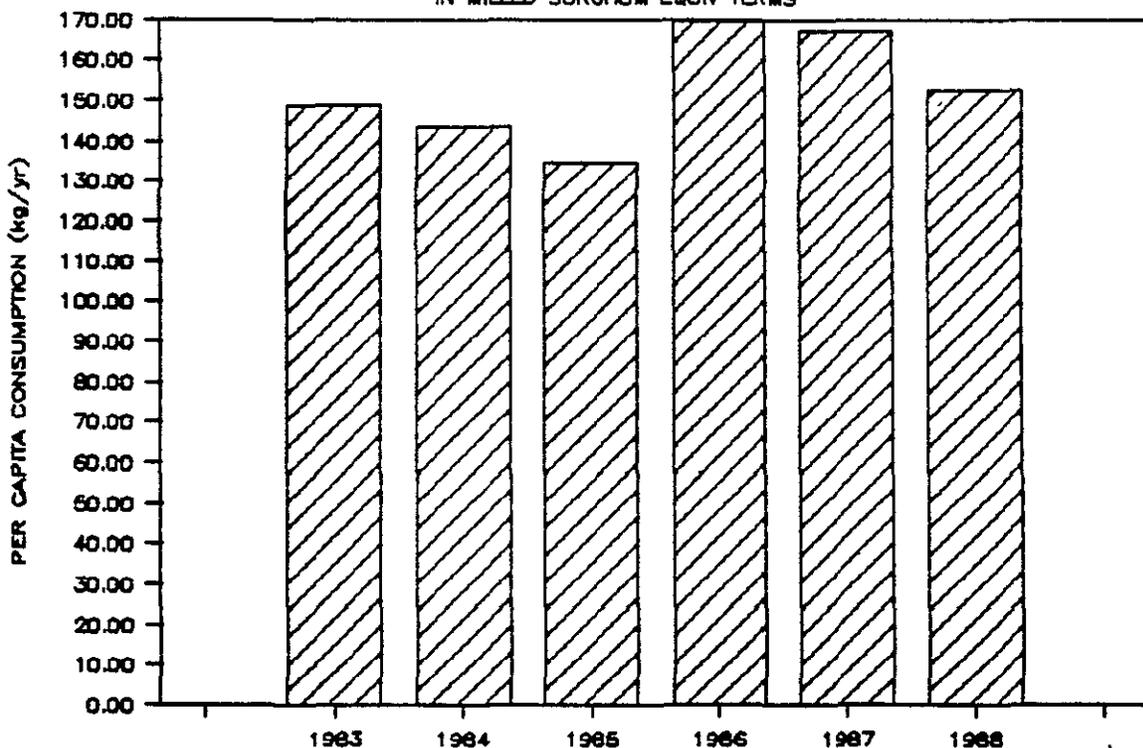
NATIONAL PER CAPITA CONSUMPTION* IN MILLED SORGHUM EQUIV TERMS



*Sorghum, millet, wheat, rice, maize

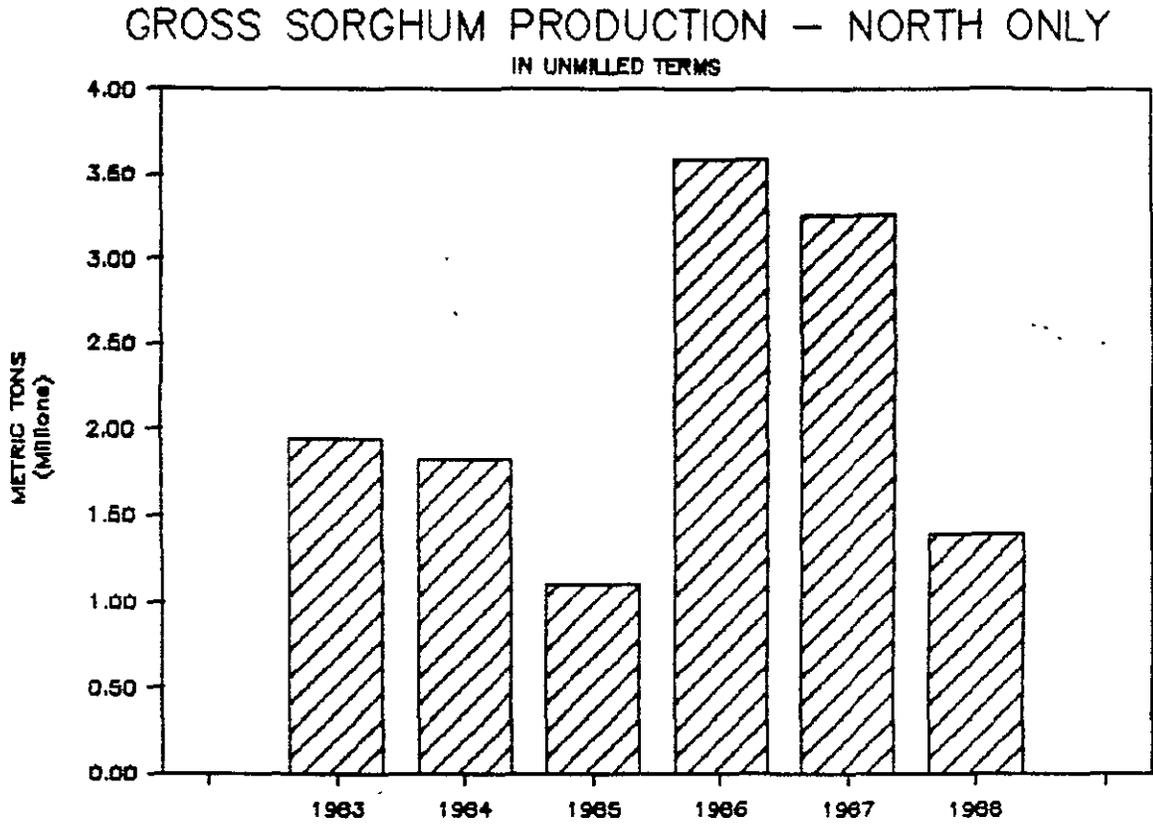
Graph 2

PER CAPITA CONSUMPTION* — NORTH ONLY IN MILLED SORGHUM EQUIV TERMS



*Sorghum, millet, wheat, rice, maize

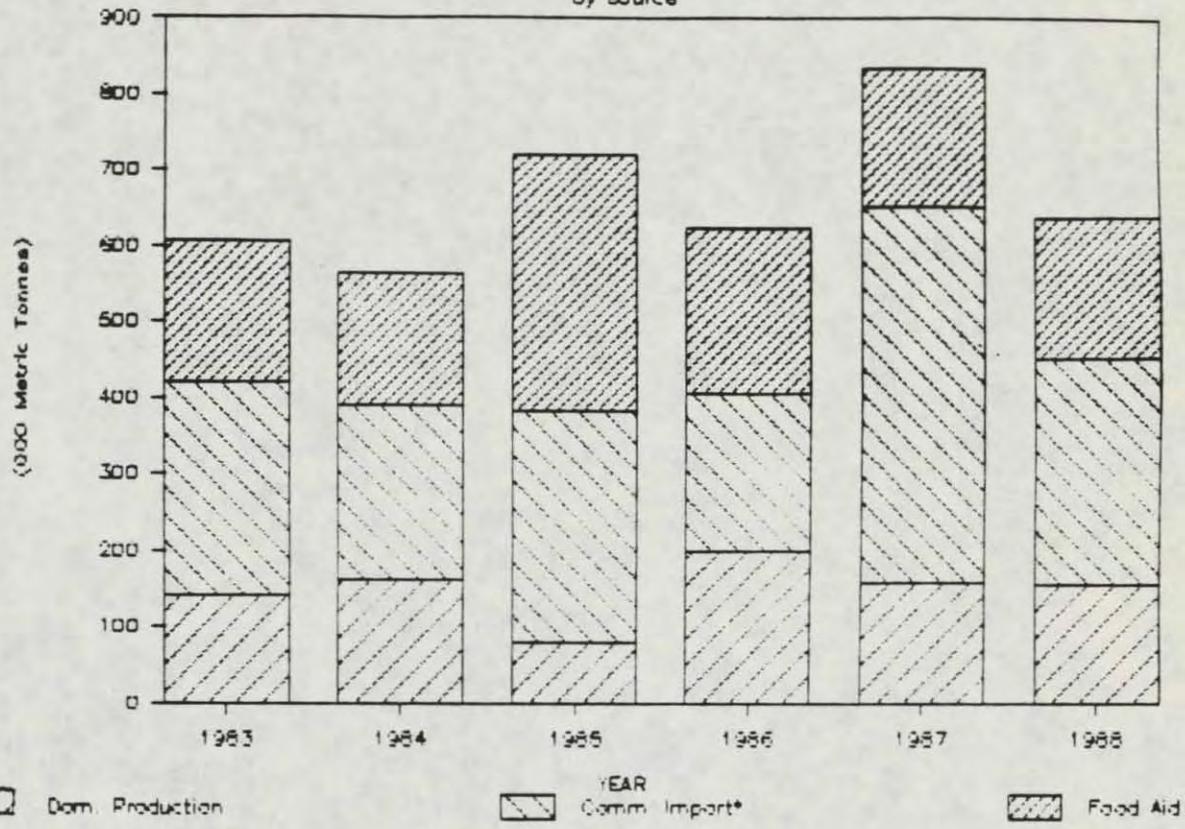
Graph 3



Graph 4

TOTAL WHEAT SUPPLY

By source



* Title I included as commercial imports.

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The Training Component

Training was identified as an important component of the TDY. There was only limited interest in the FNA methodology at the Mission, mainly from the FEWS advisor, Richard Margoluis, and Mohamed Abdul Rahman, an FSN from the ADO. A greater level of interest in the methodology existed at the APSP, although the strike curtailed some of the training there.

I decided that the best way to institutionalize the FNA methodology in Khartoum was to coordinate the effort between the Mission and the APSP. I do not think the Mission would continue to update the FNA on its own, mainly due to a lack of high level support. Because the staff at Ag. Statistics had been attempting to create a simple food balance sheet, they welcomed a more sophisticated model. Sam Bickerseth of the EEC had been assisting the Ag. Statistics division with their food balance sheet and was very interested in the model.

During the first week, I held a general session at the Mission with six people (two from ADO, two from GDO and two from EPP). I also did some basic Lotus training with Abdul Rahman, Mohamed Fadl and Hassan a/Nabi. During the second week, I worked with Richard Margoluis, Abdul Rahman and Sam Bickerseth on the computer. After the strike ended at the Ministry of Ag., I held a general training session, attended by seven people. The following day, I worked with six of the same people on the computer. Of the seven, one woman (Pmal Mustafa Murgan) understood the concepts of the model and asked very good questions. Samia Abdel Bagi also showed some understanding and would benefit from further training. On the second day of training at the Ministry of Ag., Richard Margoluis and Abdul Rahman came over to meet the people who would be involved in updating the model. We discussed coordination between the Ministry and the Mission.

Recommended Follow-Up Activities

Technical suggestions. Because of the country's enormous size and the concentration of food production in a few areas, Sudan would benefit from region-level analyses. Some regional production data is available, although accounting for the huge seasonal movements of people between regions could be difficult.

Training suggestions. Further training of people at the Ministry of Ag. and at the Mission is advised. Ideally, the two main contacts at the Mission (Margoluis and Abdul Rahman) would attend the Harare conference, along with Mustafa Murgan and Abdel Bagi from the Ministry of Ag. Sharon Fee, project officer of the APSP, said project money could be made available to send several people from the Ministry to the conference. High level support for the FNA in the Mission is still missing and should be developed.

NAIROBI MEETINGS - REDSO
20 November and 7-8 December 1987

I met briefly with David Rhoad and Judy Beckwith before going to Khartoum. We discussed general coordination between the FNA project and REDSO. Rhoad said REDSO has not been informed about trips and information gathered by the FNAP. In the future, we should make certain that all cables are info-ed to REDSO. Beckwith was attempting to do FNA's in Madagascar and Somalia but had not tried to use the FVA methodology. She said she was willing to learn the methodology but needed assistance.

On returning to Nairobi, Rhoad was out of the country and Beckwith was out sick, so very little could be accomplished. I met with Jack Royer to discuss the situation in Sudan and coordination between the FNAP and REDSO. On the following day, I met with Royer and Beckwith to continue the discussions. Beckwith said she would like to attend the Harare conference, but would not be free until late March.

FAO MEETINGS
10-11 December 1987

In Rome, Jeff Marzilli and I held meetings with the country specialists at FAO and discussed general coordination between the FNA project and the GIEWS project. Overall, the meetings were very useful. Each of the analysts expressed the desire to work together in the future.

Sudan. I discussed my findings in Sudan with G.G. Ventura. We compared data and found no major differences. Ventura said FAO has lowered its population figure for Sudan this year, removing the assumption that the 1983 census included a 3% undercount. This means that FAO is using a total population of 23.5 million, compared to 24.4 million given me by the Mission. The Mission is inconsistent on its population figure - the recent Title I cable used a population estimate of 23.68. The Mission's "official" population figure must be clarified. I also discussed Sudan with Peter Newhouse, who was attempting to estimate the amount of food that must be moved from the east to the west. I suggested that the 100,000 MT figure might be too low; he agreed and changed the amount to 150,000 MT.

Mozambique. I discussed the current situation in Mozambique with Kaj Hansen. He told me that FAO has had a representative, Canales, working with the Ministry of Commerce for over 4 years on the food balance. He showed me the Food Situation Report published by the Ministry and suggested I get the AID representative in Maputo to forward it to me. It had very detailed information about food imports and aid commitments as well as marketed production data. He also made the following comments: Rainfall in the south has been good for planting this year; FAO estimating 750,000 mt requirement; Drought in south last year caused some problems, but real problems center on the war and its' spreading to new regions; FAO Early Warning Project six months old.

Angola. Hansen said that not much is happening in Angola. The Mozambique-like donors conference didn't come about. I should find out if LeMunier has issued a report after his visit in November.

Asia. I discussed Asia with Mr. Rashid. I explained that the FNA project has not yet dealt with Asia but might in the future. India: He said that the Government of India should make import decision by February. A rapid drawdown of stocks occurring now - in July, the government had 23 million tons, by the end of October, only 16.7 million tons (11.4 million wheat, 5.3 million rice). A normal drawdown only 1-1.5 million tons per month. Rashid said he has access to information on India that can not be published by FAO for political reasons but that he would be happy to share it informally with FNA at any time. Pakistan: Rice production is down, but it won't affect domestic market much because it is mostly grown for export. Vietnam: There is a serious problems with insect infestation and drought. The big unknown is how much food comes in from USSR. Philippines: The government will probably announce that it will import in late 1988.

Latin America. Jose Purnello said two countries in Latin America may be problems this year: Brazil and Peru. As usual, there are food problems throughout Central America due to civil strife, although nothing out of the ordinary this year. Brazil: The 10 states in the Northeast, especially Bahia, faced a major crop failure due to drought this year. About 50-60% of the major food crops (maize, beans and rice) have failed, plus nearly 100% of the cash crops. Fifty percent of the population (20 million people) living below "minimum subsistence" levels. Planting is occurring now - this season will be critical (no money, no stocks). On a national level, Brazil has no problems with food supply but logistics and regional shortages are major problems. Peru: Southern Ayacucho has had a drought for several years. Because it is Sendero Luminoso territory, very little information can be gathered and the Government did not request aid last year despite reportedly serious problems.

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LIST OF CONTACTS - PEOPLE INTERVIEWED

- 1 - Attended general session
- 2 - Attended computer session
- 3 - Lotus training

Khartoum - USAID

- Richard Margoluis - FEWS Coordinator (1,2)
- Anita Macke - GDO
- Mohamed Abdul Rahman - ADO (1,2,3)
- Brian D'Silva - EEP/USDA (1)
- Mohammed Fadl - GDO (1,3)
- Sharon Fee - ADO
- Hassan a/Nabi - EPP (1,3)

Khartoum - USAID Agriculture Statistics and Planning Project

- M.E. Sarhan
- Surjit Sindu
- William Bateson

Khartoum - Ministry of Agriculture - Ag. Statistics.

- Hassan El-Sheikh - Head, Outlook Board
- Salwa Ahmed - Production Economics (1,2)
- Babikar Ahmed - Marketing (1,2)
- Samia Abdel Baqi - Statistics (1,2)
- Hattim Makki Mohamed Majiki - Food Security (1)
- Abubekie Eltayeb - Marketing (1,2)
- Nabeeh Ahmed Abdoon - Marketing (1,2)
- Amal Mustafa Murgan - Food Security (1,2)

Khartoum - FAO

- Magdy Ghieth

Khartoum - EEC

- Sam Bickerseth (1,2)
- George Guyer

Khartoum - Agricultural Bank of Sudan

- Mohamed Qadif

Khartoum - The Flour Mills Co.

- Salah El Din El Zubeir, General Manager

Nairobi - REDSO

David Rhoad
Judy Beckwith
Jack Royer

Rome - FAO

Kaj Hansen - Mozambique
G.G. Ventura - Sudan
Josh Rozen - Computer Specialist
Raffaello Marsili - GIEWS
Peter Newhouse - GIEWS
Jose Purnello - Latin America
Abdur Rashid - Asia

Ethiopia - Trip Report
Food Needs Assessment
November 12 - December 6
Jeffrey Marzilli
FVA Consultant

Highlights of the 1988 assessment:

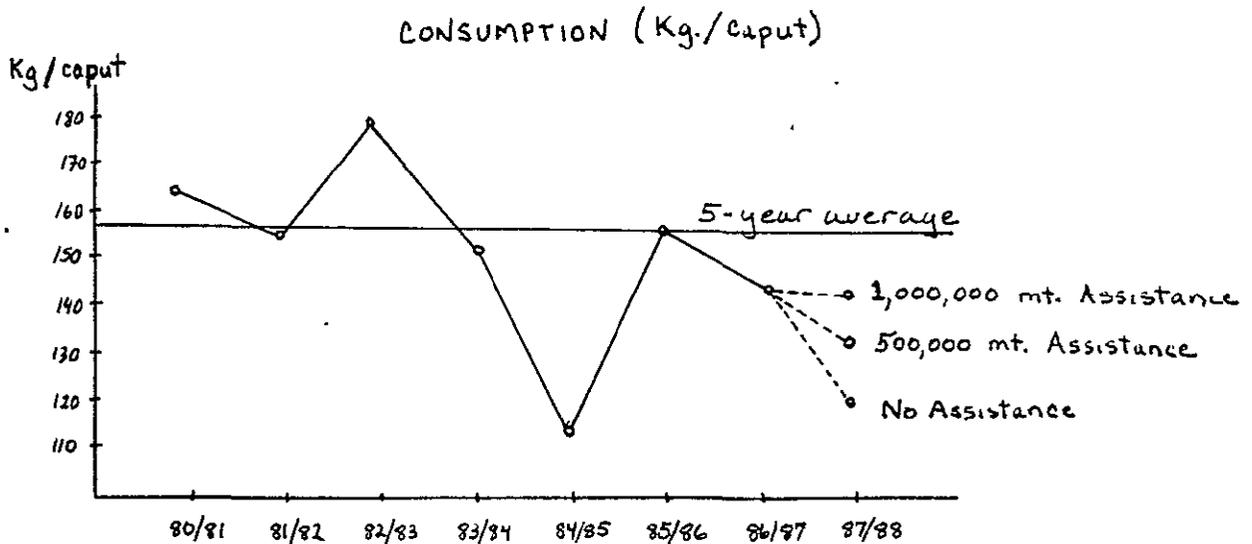
The CY 1988 food aid requirement in Ethiopia is 1.62 million metric tons (in cereal equivalent). This is an aggregate value based on the food balance sheet methodology developed by USAID/FVA Food Needs Assessment Project. The estimate represents the aggregate quantity of food aid required in CY 1988 if per capita consumption is to be maintained at or slightly below the average level of consumption in Ethiopia over the past five years.

Overall agricultural production is estimated at 13 percent below the 1986/87 cropping year, or about the same percentage off the 1981/82 - 1986/87 (excluding 1984/85) five-year average. Production of cereals and pulses has been normal to above normal in seven regions (Gojam, Gonder, Bale, Kefa, Sidamo, Illubabor and Wellega), but considerably below normal in others (Hararghe, Wello, Northern Shewa, Rift Shewa, Eritrea and Tigray). In Eritrea and Tigray, the areas most severely affected by drought, production is estimated at 30 and 50 percent of average, respectively.

The average per capita consumption in Ethiopia, based on the 1981/82 - 1986/87 (excluding 1984/85) consumption of cereals, pulses, roots, tubers and milk is 156 kilograms per year (all consumption figures are expressed in cereal equivalents). Given this five-year average and a projected mid-year population of 46.9 million persons, the total food need for CY 1988 is estimated at 7.3 million metric tons. With 5.7 million metric tons available from domestic production and imports, the total food aid required in CY 1988 to maintain the average per capita consumption at 156 kilograms per year is 1.6 million metric tons. Subtracting out a very conservative structural deficit estimate of 0.4 million metric tons leaves an "emergency" deficit of 1.2 million metric tons. With CY 1987 carryover relief stocks and pledges still to arrive estimated at 0.3 million metric tons, the uncovered portion of the emergency deficit is 0.9 million metric tons.

Per capita consumption in Ethiopia has been declining for 10 years. The most-recent five-year average for per capita consumption is 156 kilograms per year. This is compared to 160 kilograms per person over the five-year average one year ago. Actual per capita consumption in the 1986/87 crop year, which showed the second-best harvest in seven years, was 143 kilograms per person. 1987/88 per capita consumption will not reach this

level even if one million metric tons of food aid could be distributed.



Although Ethiopia's back to back droughts of 1984 and 1987 have led to extraordinary deficits, one must not underestimate the role of structural causes on the decline in consumption. Ethiopia's large and growing structural deficit is cause for increased concern. Agricultural production simply is not keeping pace with the increased demands for food resulting from a rate of population growth which approaches three percent. Serious attention must be given to the study of this deficit. Crude analysis suggests that Ethiopia has already reached a magnitude of chronic deficit (deficit which will occur even with normal production levels) in excess of that which can be adequately addressed, even with the full support of the international community. If this is true, per capita consumption will continue to decline and a significant portion of the population could soon be "at risk" even under normal rainfall and production levels.

Trip chronology:

The CY 1988 Food Needs Assessment for Ethiopia was conducted November 14 - December 10 in Addis Ababa. FVA economic consultant Jeffrey Marzilli and USAID/REDSO agricultural economist Robert Armstrong assisted USAID/Addis Ababa agricultural economists Thomas Worrick and Ato Debebe Gonafer with the assessment. The CY 1988 assessment represents the latest in a series of such reports on the food situation in Ethiopia and is based strongly on the conceptual framework developed by David Atwood (1985, 1987) and Thomas Worrick (1986). The analytical framework for this and all previous food needs assessments in Ethiopia is based on the food balance sheet method advocated by USAID/FVA.

The food needs assessment team in USAID/FVA began preparations for the assessment in late October when the schedule

for the 1987 FAO Crop Assessment Mission was released from Rome. Given the importance of the Crop Assessment Mission's efforts to the food needs assessment process in Ethiopia, every effort was taken to plan a simultaneous presence in Ethiopia for FVA consultant Marzilli. Preliminary indications were that Marzilli would be permitted to accompany FAO Team Leader Jack Dalton on several Crop Assessment Mission field trips.

Plans were made for Marzilli to travel via Nairobi in order to meet briefly with USAID/REDSO Food for Peace Director David Rhoad and agricultural economist William Faught. Ten days before departure it was learned that Thomas Worrick, USAID agricultural economist with experience in food needs assessment in Ethiopia, would be in Addis Ababa and available for consultation during this year's assessment.

The unexpected November 12 snowstorm in Washington delayed Marzilli's departure by one day and flight rescheduling problems led to the cancellation of the Nairobi stopover. Marzilli flew directly to Addis Ababa.

Upon arriving in Addis Ababa, Marzilli was met by Thomas Worrick and informed of Worrick's permanent assignment to USAID/Addis Ababa. He was also informed of Worrick's close personal friendship with FAO Crop Assessment Mission Team Leader Jack Dalton. It was very clear from the start that USAID/Addis Ababa was fully capable, willing, and had every intention of doing their own 1988 food needs assessment. Worrick invited FVA consultant Marzilli to participate fully in that process.

Initial plans for Marzilli and Worrick to travel with the FAO Crop Assessment Mission to several regions were confounded by an unexpected cut-back in travel permits by the Ethiopian Government. The cut-back, although temporary, was long enough to prevent the USAID team from accompanying Dalton as they had expected. The real loss here was not in the areas unseen but in the time unspent with Dalton, who was thereafter too busy for any significant discussion with respect to his findings. Worrick was able to meet briefly with Dalton in the course of the final week, while Marzilli had no business contact with him beyond one 15-minute chance meeting in the parking lot of the Hilton and an additional one-hour meeting in Rome after the release of the FAO study.

It should be noted that the FAO numbers were kept very confidential this year in comparison to previous years, and no preliminary release of USAID estimates was possible. Worrick was entrusted with an unofficial copy of the preliminary numbers on December 3, but only because of his personal friendship with FAO Team Leader Dalton, and with the explicit instructions that the numbers could absolutely not be used in the "unofficial but official" manner of the past. FAO participants Peter Newhouse (Rome) and Ingo Loerbrooks (Country Representative) were very adamant in their opposition to any friendly sharing of these

results prior to official release. This pressure undoubtedly stemmed from pressure exerted from the Ethiopian government.

Dalton was able, however, to advise the USAID team (which now included REDSO agricultural economist Robert Armstrong) that the FAO aggregate crop estimate would not vary significantly from the analysis already completed by the FAO-sponsored Food Information System Project of the Ethiopian government. This allowed the USAID team to work up a preliminary estimate of cereal and pulse production for the peasant sector, Meher harvest. Marzilli advised that these numbers be used as the basis for the USAID assessment but Worrick was not comfortable with the data for several regions. The basis for Worrick's disagreement was well-founded: FAO would be reporting significantly different results in these areas. Worrick suggested that the team postpone a decision on this matter until some additional information could be collected. Since Worrick and Armstrong had obtained travel permission for two of the regions under consideration, the team decided to wait. It was noted, however, that a final decision would not be possible before Marzilli's departure on December 6. The team discussed the implications of this and it was decided that Marzilli would brief Armstrong on his (Marzilli's) analysis to date, and that Armstrong would then amend the assessment according to the information and impressions obtained on the field trips. The additional time would also permit Armstrong and Worrick to collect better information from the field regarding production of milk and potatoes, two important sources of domestic production.

Marzilli spent three hours over two days briefing Armstrong on both the Ethiopia Assessment and the food balance sheet methodology in general. Marzilli also prepared the background and methodological sections of the 1988 report, leaving the final numerical presentation and executive summary for Armstrong and Worrick to complete. It was agreed that final decisions would be taken and the preliminary numbers agreed upon by Monday, December 7, due to the arrival in-country of the USAID Administrator. Marzilli agreed to call Worrick from Rome immediately upon the release, December 10, of FAO numbers. Worrick was then expected to make necessary amendments and cable (immediate) USAID/Washington with the final results.

Marzilli departed Addis for Rome on December 6 and was on pre-arranged leave in Northern Italy through December 9.

Marzilli contacted Worrick from Rome on December 10 to discuss necessary changes to the assessment in light of the FAO release. Worrick made the necessary adjustments to the immediate cable, which was sent to Washington several hours later, and Marzilli cabled the bottom line information to FNA Team Leader Bruce Cogill in Virginia.

The remainder of the trip was spent with colleague Michele McNabb in Rome, meeting and discussing FAO activities and

methodologies with FAO representatives Peter Newhouse, Jack Dalton, Kaj Hansen, Raphaelo Marsili and Gigi Ventura. The general impression obtained is that Newhouse and his staff are very interested in working closely and cooperatively with USAID on food needs assessment.

Ethiopia specialist Hansen and FVA consultant Marzilli spent several hours comparing information and methodologies with respect to Ethiopia. All apparent discrepancies were accounted for and it was agreed that FAO and USAID are in virtual agreement on the food supply situation in Ethiopia. The two organizations hold differing assumptions with respect to the expected utilization of AMC stocks and security reserves, but it was agreed that these are simple judgement calls that will be proven one way or the other in the upcoming months. No strong evidence exists to facilitate agreement on either assumption at this point. (A more detailed comparison of USAID/FAO findings is appended to this report).

A session with Josh Rosen, FAO computer consultant in charge of developing the FAO food spreadsheet, provided a look at the proposed FAO spreadsheet in great detail. FVA consultants Marzilli and McNabb agreed that the spreadsheet, as proposed, is probably much too complicated for dissemination to USAID missions, but that it could serve FVA data base purposes quite well. The FVA consultants expressed a sincere desire to work closely with FAO in the coming weeks, as both organizations are in the process of updating methodologies and it would be most helpful to avoid methodological discrepancies that would lead to systemic disagreement on numbers. The possibility of hiring Rosen on a short-term consultancy to modify the FVA data base for complete compatibility with FAO was also discussed. A hard copy of the FAO spreadsheet was carried back to Washington for further analysis by the entire food needs assessment team.

Marzilli returned to Washington on December 14.

Mission capabilities in food needs assessment:

As described above, the new USAID/Addis Ababa agricultural economist, Thomas Worrick, is thoroughly competent and experienced in food needs assessment. He is well-versed in the food balance sheet methodology and has employed it successfully in the past. He does not appear to be interested in the Lotus template and does not, himself, need it. He is capable of very sophisticated analysis without it.

The new Food for Peace Officer, Robert Luneberg, arrived several days before the Assessment was completed. He played only a marginal role in the effort but was very quick to understand all the concepts when briefed. He is familiar with assessment methodology in general and is interested in looking at the Lotus template. He is not familiar with Lotus but does not foresee any

problems learning, since his wife, who will also be working in the USAID mission, is quite proficient with it.

Ato Debebe Gonafer, the Ethiopian agricultural economist at the mission, once again provided invaluable insight into the agricultural situation in his country. Ato Debebe is very interested in learning Lotus and the template, and he would make an excellent candidate for the March workshop in Harare. There is some question as to how public a role he can play in future food needs assessments in Ethiopia, but he will no doubt remain an irreplaceable, if unofficial, source in the background and should be trained to whatever extent is possible. Debebe is the greatest hope for long-term capacity in food needs assessment upon which the mission can count.

Some effort must be made to bring USAID/Addis Ababa computer memory up to par before the spreadsheet can be utilized. The memory boards are (or soon will be) available and, with the arrival of Mrs. Luneberg, will probably be swiftly installed. Until now, there has been no serious Lotus user in the mission.

The future role of the FNA team in Ethiopia appears limited. The capacity exists in the mission for reliable analysis and reporting, and a request for further TDY assistance would be quite unusual. Such a request is more likely to come from Washington and should only be agreed to if there is full concurrence from the mission in Addis.

Information sources and contacts:

As in years before, the single most important contact for the assessment was Ato Debebe Gonafer. With many years experience in high-level positions in Ethiopian Agriculture, Debebe's contacts and personal relationships with people in high places made the entire process of information collection and dissemination much smoother than would have been the case otherwise. A complete list of governmental and non-governmental contacts appears at the end of this report.

A second very important source of information for this year's report was FAO's resident advisor to the Ethiopian Food Information System Project, Jan Jansonius. Mr. Jansonius directs this FAO-sponsored inter-agency project to collect, analyze and disseminate a wide variety of statistics on agricultural development in Ethiopia. It is the opinion of USAID and FAO that this project is quickly approaching an acceptable level of competence, above which there will no longer be the need for annual Crop Assessment Missions from Rome. An official description of the scope and capacity of Jansonius' project should be forthcoming from Addis Ababa in January.

Finally, discussions with FEWS country analyst Gary Eilerts, WFP field monitors Malcomb Ridout and Cameron Peters, and WFP

logistical officer Irene Lacey proved very helpful in bringing the whole field of information together into a comprehensible package. USAID/Addis Ababa PSCs Debbie Saldy and Sheila Reid were indispensable in identifying PVO and other contacts and arranging meetings.

SUMMARY

CY 1988 Food Needs Assessment
ETHIOPIA
Food Needs Assessment Project

The 1988 total food deficit in Ethiopia is 1.6 million metric tons (in cereal equivalents). This is the total amount of food required, in addition to domestic production, food imports and (non-relief) food stocks, to maintain the 1988 population at the level of consumption to which they have become accustomed.

The 1988 total deficit is the difference between the estimated supply of food available from all non-relief sources (net production, net food imports, and food stock adjustments) and the expected demand for food, as determined using projected population levels and historical consumption data. These numbers appear in the table below.

| | |
|----------------------------------|-----------------------|
| Net domestic production..... | 5,516,000 metric tons |
| Net food imports..... | 175,000 metric tons |
| AMC stock adjustments..... | 0 metric tons |
| Security stock adjustments..... | 0 metric tons |
| ----- | ----- |
| Total food available..... | 5,691,000 metric tons |
| | |
| Projected population..... | 46,900,000 persons |
| Historical consumption/caput.... | 156 kg./person |
| ----- | ----- |
| Expected demand for food..... | 7,316,000 metric tons |
| | |
| Total deficit..... | 1,625,000 metric tons |

STRUCTURAL DEFICIT

In the case of Ethiopia, the U.S. Government requires that a distinction be made between the portion of the total food deficit which is chronic, or structural (that which would have occurred even without the drought) and the portion which is episodic, or extraordinary (in this case, drought-related). The 1988 assessment estimates the structural level of deficit at 450,000 metric tons. This is subtracted from the estimated total deficit of 1,625,000 metric tons to yield a residual "emergency" deficit of 1,175,000 metric tons.

| | |
|-------------------------|--------------------------------|
| Total deficit..... | 1,625,000 metric tons |
| Structural deficit..... | 450,000 metric tons |
| Emergency deficit..... | ----- 1,175,000 metric tons |

FOOD SUPPLY

Gross agricultural production is estimated at 87 percent of normal for the 1987/88 cropping year. This 13 percent decrease from the 1981/82 - 1986/87 (excluding 1984/85) average is due primarily to a failure of the rains in the early part of the main planting season. Although many regions were unaffected by the drought and show average to above average production this year (Gojam, Gonder, Bale, Kefa, Sidamo, Illubabor and Wellega), those regions most severely affected (Eritrea, Tigray, Wello, Shewa and Hararghe) are experiencing record or near-record shortfalls. When corrected for seed, feed and post-harvest losses, the portion of the total 1987/88 harvest available for consumption is 5,516,000 metric tons.

Commercial food imports can be expected to play some role in replacing lost agricultural production, but that role will be limited due to the perennial shortage of foreign currency and competing demands for what little is available. The estimate of 200,000 metric tons is nearly double the five-year average and 25 percent over the level of last year. This is still below the 300,000 metric ton level recorded in 1985.

Non-relief food stocks held by the Agricultural Marketing corporation are expected to fall to a level of 270,000 metric tons by December 31, 1987. USAID/Addis Ababa believe that this entire level will be maintained by the AMC as working stocks, thereby eliminating any chance of a stock contribution to consumption in 1988. USAID/Addis also believe that the promised 50,000 metric ton contribution from the state-controlled food security reserve will never materialize. Under these assumptions, the stock adjustment is zero.

CONSUMPTION

The estimated consumption of 156 kilograms per capita is determined by calculating per capita total consumption from all sources (including relief contributions) for each year in the base period and taking a simple average. The 156 kilogram share is then multiplied by the projected population for 1988 (46.9 million) to arrive at 7,316,000 metric tons, the level of food necessary to keep that population consuming at the average level of the past five years.

It is important to note that there is no normative evaluation of per capita consumption employed in this methodology. It is very likely that nutritional analysis would suggest a share other than 156 kilograms per person. However, in this analysis it is assumed only that consumption will be maintained at some historical level. No attempt is made to compare that level to what, under certain assumptions, "should" be the case.

ISSUES FOR CONSIDERATION

Underestimation of structural deficit:

It is very likely that the methodology seriously understates the true extent of the structural deficit. If one assumes a relatively stagnant level of agricultural production and food imports, as the base period data seems to suggest, then the structural deficit can be expected to increase proportionately, or nearly so, with the level of population (due to the greater and greater number of mouths to feed from fixed food resources.) If this is indeed the situation in Ethiopia, the estimate for the 1988 structural deficit is more accurately depicted by a straight-line projection in the neighborhood of 1,000,000 metric tons, instead of the 450,000 metric ton base period average used in the analysis above.

Declining per capita consumption:

The fact that per capita consumption appears to have been declining for more than 10 years supports the proposition that the structural deficit may be seriously understated. Significant numbers of people are obviously not starving in Ethiopia in normal years. However, serious attention should be given to the question of whether people are, indeed, eating less and less each year and, if so, at what point this will begin to manifest itself through chronic malnutrition and starvation in years of normal production. Crude analysis suggests that we may already be nearing a point, beyond which even a fully-mobilized, adequately-funded international effort on the scale of 1984/85 or 1987/88 will be ineffective in preventing wide-scale malnutrition and starvation.

Concurrence with FAO and USDA estimates:

When interpreted correctly, USAID/Addis Ababa, FAO and USDA reports show significant agreement on the bottom line estimates of the 1988 food situation in Ethiopia. Differing assumptions exist with respect to the levels and uses of stocks and security reserves controlled by the Government of Ethiopia, but assumptions will soon be replaced with actual data and any semblance of disagreement among the organizations assessing the food security situation should disappear.

TABLE 1
1987/88 FOOD DEFICIT

| | | |
|-------------------------------------|--|-------|
| (A.) | Normal Consumption (1) | 7,316 |
| | 156 kg/person | |
| | 46.9 million people | |
| Domestic Staple Food Production | | |
| (B.) | Gross Production (Cereals and Pulses) (2) | 5,764 |
| (C.) | Less Seed Requirements (3) | 317 |
| (D.) | Less Post-Harvest Losses (4) | 865 |
| (E.) | Net Production (Cereals and Pulses) | 4,582 |
| Additional Domestic Food Production | | |
| (F.) | Enset (5) | 550 |
| (G.) | Potatoes (6) | 80 |
| (H.) | Milk Offtake (7) | 304 |
| (I.) | Total Domestic Food Production (E + F + G + H) | 5,516 |
| (J.) | Net Change in Government Stocks (8) | 0 |
| (K.) | Total Food Available (Domestic Sources) (I + J) | 5,516 |
| (L.) | Import Requirement (A - K) | 1,800 |
| (M.) | Net Commercial Food Imports (N - O) | 175 |
| (N.) | Anticipated Commercial Food Imports (9) | 200 |
| (O.) | Anticipated Commercial Food Exports (Pulses) (10) | 25 |
| (P.) | TOTAL CY 1988 FOOD DEFICIT (L - O) | 1,625 |
| (Q.) | Structural Deficit (11) | 449 |
| (R.) | Regular Food Aid Programs (12) | 167 |
| (S.) | Uncovered Structural Deficit (Q - R) | 282 |
| (T.) | CY 1988 EMERGENCY DEFICIT (P - O) | 1,176 |
| (U.) | Carryover Relief Stocks (Dec. 31, 1987) (13) | 192 |
| (V.) | CY 1987 Food Pledges Still to Arrive (14) | 116 |
| (W.) | CY 1988 Emergency Deficit (less 1987 carryovers) (T - U - V) | 868 |

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NOTES:

(1) From Table 2

(2) From Table 3

(3) Seed Requirements are estimated as 5.5% of gross production

(4) Post-harvest losses are estimated as .5% of gross production

(5) (6) (7) (8) (9) (10) USAID/Addis Ababa estimate

(11) From Table 5

(12) From Table 7

(13) From Table 6

TABLE 2
TOTAL AND PER CAPITA CONSUMPTION, 1980/81 - 1986/87
(x000 mt)

| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | AVERAGE |
|--|-------|-------|-------|-------|-------|-------|-------|------------------------------|
| | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 81/82-86/87 (excl. 84/85) |
| Domestic Production | | | | | | | | |
| Gross Production, Cereals and Pulses (1) | 6,509 | 6,238 | 7,660 | 6,237 | 4,553 | 6,169 | 6,629 | 6,587 |
| Less Seed Requirements (2) | 316 | 314 | 338 | 318 | 283 | 339 | 367 | 335 |
| Less Post-Harvest Losses (3) | 976 | 936 | 1,149 | 936 | 683 | 925 | 994 | 988 |
| Net Production, Cereals and Pulses | 5,217 | 4,988 | 6,173 | 4,983 | 3,587 | 4,905 | 5,268 | 5,263 |
| Additional Food Production | | | | | | | | |
| Enset (4) | 579 | 594 | 609 | 512 | 500 | 500 | 580 | 559 |
| Milk Offtake (5) | 279 | 282 | 295 | 304 | 152 | 207 | 235 | 265 |
| Total Domestic Food Production | 6,075 | 5,864 | 7,077 | 5,799 | 4,239 | 5,612 | 6,083 | 6,087 |
| Commodity Trade Effects | | | | | | | | |
| Commercial Food Imports (6) | 51 | 39 | 2 | 53 | 253 | 300 | 157 | 110 |
| Plus Food Aid (7) | 152 | 182 | 298 | 458 | 846 | 865 | 419 | 444 |
| Gross Food Imports | 203 | 221 | 300 | 511 | 1,099 | 1,165 | 576 | 555 |
| Less Food Exports (8) | 25 | 35 | 36 | 28 | 10 | 14 | 25 | 28 |
| Net Food Imports | 178 | 186 | 264 | 483 | 1,089 | 1,151 | 551 | 527 |
| Government Stock Adjustments (9) | | | | | | | | |
| Opening Food Stocks | | | | | 0 | 306 | 174 | 160 |
| Less Closing Food Stocks | | | | | 306 | 174 | 270 | 250 |
| Net Contribution from Stocks | | | | | -306 | 132 | -96 | (90) |
| Total Consumption | 6,253 | 6,050 | 7,341 | 6,282 | 5,022 | 6,895 | 6,538 | 6,524 |
| Population (11) | 38.55 | 39.67 | 40.82 | 42.00 | 43.22 | 44.30 | 45.59 | 42 |
| Consumption per capita (kg) | 162 | 153 | 180 | 150 | 116 | 156 | 143 | 156 |

(1) For years 1979/80 - 1983/84: Central Statistics Office, "Time Series Data," December 1984.

For 1984/85: CSO, "Agricultural Sample Survey, 1984/85," February 1986.

For 1985/86: USAID/Addis Ababa, "1986 Emergency Food Need Assessment for Ethiopia," February, 1986.

For 1986/87: CSO, "Report on the Current Crop, Weather and Food Situation," September 1987.

(2) From Table (SEED)

(3) Post-harvest losses estimated at 15% of gross production

(4) In cereal equivalent; from USAID "1987 Food Need Assessment for Ethiopia," May 1987, and USAID/Addis Ababa 1987/88 estimates.

(5) USAID, "1987 Food Need Assessment for Ethiopia," February 1987

(6) For 1979/80 - 1985/86: USAID "1987 Food Need Assessment for Ethiopia," May 1987.
For 1986/87: Agricultural Marketing Corporation, "Annual Report, 1986/87".

(7) For 1979/80 - 1983/84: USAID, "1987 Food Need Assessment for Ethiopia," May 1987.
For 1984/85 - 1986/87: USAID/Addis Ababa estimate.

(8) For 1979/80 - 1985/86: USAID, "1987 Food Need Assessment for Ethiopia," May 1987.
For 1986/87: USAID/Addis Ababa estimate.

(9) For 1979/80 - 1985/86: USAID, "1987 Food Need Assessment for Ethiopia," May 1987.
For 1986/87: USAID/Addis Ababa estimate.

(10) From Table (POPULATION)

TABLE X

GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES, 1986/87 - 1987/88, BY REGION
Peasant Sector, Meher Season
(x000 mt)

| REGION | CSO/FIS (1) | CSO/FIS (2) | 1987/88 |
|--------------------|-------------------|---------------------|--------------------|
| | ACTUAL 1986/87 | ESTIMATE 1987/88 | AS % OF 1986/87 |
| ARSI | 457 | 332 | 73% |
| BALE | 60 | 48 | 80% |
| ERITREA | 135 | 43 | 32% |
| GAMA GOFA | 77 | 70 | 91% |
| GOJAM | 780 | 796 | 102% |
| GONDER | 384 | 385 | 100% |
| HARARGE | 446 | 269 | 60% |
| ILLUBABOR | 148 | 160 | 108% |
| KEFA | 461 | 461 | 100% |
| SHOA | 1685 | 1568 | 93% |
| SIDAMO | 265 | 226 | 85% |
| TIGRAY | 159 | 75 | 51% |
| WELLEGA | 325 | 362 | 111% |
| WELLO | 374 | 224 | 60% |
| PEASANT MEHER | 5747 | 5019 | 87% |
| STATE MEHER | 327 | 262 | 80% |
| COOP MEHER | 220 | 193 | 88% |
| TOTAL BELG (3) | 335 | 280 | 84% |
| (errors/omissions) | | 10 | |
| TOTAL | 6629 | 5764 | 87% |

NOTES:

(1) 1986/87 data are from CSO "Report on the Current Crop, Weather and Food Situation", September 21, 1987.

(2) 1987/88 estimates are from CSO, "Report on the Current Crop, Weather and Food Situation (Food Information System project, CSO/FAO)", September 21, 1987.

(3) USAID/Addis Ababa estimate.

TABLE 4
GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES, 1979/80 - 1986/87, BY REGION
(All Sectors, Meher and Belg Seasons)

| REGION | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | AVERAGE |
|-----------|------|------|------|------|------|------|------|------------------------------|
| | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 81/82-86/87 (excl. 84/85) |
| ARSI | 504 | 561 | 602 | 484 | 437 | 520 | 628 | 559 |
| BALE | 146 | 156 | 198 | 130 | 123 | 152 | 158 | 159 |
| ERITREA | 188 | 188 | 188 | 188 | 94 | 126 | 188 | 175 |
| GAMA GDFA | 123 | 93 | 148 | 99 | 67 | 128 | 77 | 109 |
| GOJAM | 727 | 748 | 898 | 775 | 717 | 834 | 879 | 827 |
| GONDER | 485 | 529 | 773 | 515 | 443 | 638 | 393 | 570 |
| HARARGE | 334 | 364 | 481 | 353 | 222 | 287 | 477 | 392 |
| ILLUBABOR | 106 | 132 | 218 | 247 | 124 | 184 | 155 | 187 |
| KEFA | 312 | 223 | 352 | 362 | 238 | 314 | 470 | 344 |
| SHOA | 1731 | 1475 | 1989 | 1633 | 1219 | 1593 | 1759 | 1690 |
| SIDAMO | 192 | 153 | 212 | 193 | 164 | 173 | 303 | 207 |
| TIGRAY | 229 | 229 | 229 | 229 | 80 | 153 | 229 | 214 |
| WELLEGA | 432 | 521 | 585 | 527 | 428 | 547 | 446 | 525 |
| WELLO | 1000 | 866 | 788 | 503 | 197 | 520 | 467 | 629 |
| TOTAL | 6509 | 6238 | 7660 | 6237 | 4553 | 6169 | 6629 | 6587 |

Source of Data:

1979/80 - 1983/84 are from CSO, "Time Series Data 1979/80 -- 1983/84"

Errors & Omissions are due to differences between the summation of the regional data and the national level data in the CSO document.

1984/85 data are from CSO, "Agricultural Sample Survey," 1984/85 and 1985/86. Estimates for Eritrea and Tigrea are provided by USAID/Addis Ababa.

1985/86 data are from USAID/Addis Ababa, "1986 Emergency Food Need Assessment for Ethiopia, adjusted for exceptional Belg crop harvested in mid 1986. The estimate of Belg production was raised from 200,000 mt to 350,000 mt, with the increase allocated across regions by their average shares in total Belg production. USAID believes that CSO estimates for this year are seriously understated.

1986/87 data are from CSO "Report on the Current Crop, Weather and Food Situation", September 21, 1987.

| TABLE 4b | | | | | | | | |
|---|------|------|------|------|------|------|------|---------------|
| GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES, 1979/80 - 1986/87, BY REGION | | | | | | | | |
| (Percent of Average) | | | | | | | | |
| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | AVERAGE |
| | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 81/82-86/87 |
| | | | | | | | | (excl. 84/85) |
| ARSI | 90% | 100% | 108% | 87% | 78% | 93% | 112% | 559 |
| BALE | 92% | 98% | 125% | 82% | 77% | 96% | 99% | 159 |
| ERITREA | 107% | 107% | 107% | 107% | 54% | 72% | 107% | 175 |
| GAMA GOFA | 113% | 85% | 135% | 91% | 61% | 117% | 71% | 109 |
| GOJAM | 88% | 90% | 109% | 94% | 87% | 101% | 106% | 827 |
| GONDER | 85% | 93% | 136% | 90% | 78% | 112% | 69% | 570 |
| HARARGE | 85% | 93% | 123% | 90% | 57% | 73% | 122% | 392 |
| ILLUBABOR | 57% | 71% | 116% | 132% | 66% | 98% | 83% | 187 |
| KEFA | 91% | 65% | 102% | 105% | 69% | 91% | 137% | 344 |
| SHOA | 102% | 87% | 118% | 97% | 72% | 94% | 104% | 1,650 |
| SIDAMO | 93% | 74% | 103% | 93% | 79% | 84% | 147% | 207 |
| TIGRAY | 107% | 107% | 107% | 107% | 37% | 72% | 107% | 214 |
| WELLEGA | 82% | 99% | 111% | 100% | 82% | 104% | 85% | 525 |
| WELLO | 159% | 138% | 125% | 80% | 31% | 83% | 74% | 629 |
| TOTAL | 99% | 95% | 116% | 95% | 69% | 94% | 101% | 6587 |

Source: See Table 4

TABLE 5
AVERAGE STRUCTURAL DEFICIT
(x000 mt)

| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | AVG. 1981/82 |
|---------------------------------|---------------|-------|-------|-------|-------|-------|-------|--------------|
| | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | -1986/87 |
| | (excl. 84/85) | | | | | | | |
| Consumption Requirement (1) | 6,014 | 6,189 | 6,368 | 6,552 | 6,742 | 6,911 | 7,111 | |
| Population | 38.55 | 39.67 | 40.82 | 42.00 | 43.22 | 44.30 | 45.58 | |
| Gross Production | | | | | | | | |
| Cereals and Pulses | 6,509 | 6,238 | 7,660 | 6,237 | 4,553 | 6,169 | 6,629 | |
| Less Seed Requirements | 316 | 314 | 338 | 318 | 283 | 339 | 367 | |
| Less Post-Harvest Losses | 976 | 936 | 1,149 | 936 | 683 | 925 | 994 | |
| Net Production | 5,217 | 4,988 | 6,173 | 4,983 | 3,587 | 4,905 | 5,268 | |
| Plus Enset | 579 | 594 | 609 | 512 | 500 | 500 | 580 | |
| Plus Milk Consumption | 279 | 282 | 295 | 304 | 152 | 207 | 235 | |
| Total Domestic Production | 6,075 | 5,864 | 7,077 | 5,799 | 4,239 | 5,612 | 6,083 | |
| Stock Adjustments | | | | | -306 | 132 | -96 | |
| Import Requirement (2) | (61) | 324 | (709) | 753 | 2,809 | 1,167 | 1,124 | |
| Net Commercial Food Imports (3) | 26 | 4 | (34) | 25 | 243 | 286 | 132 | |
| Food Deficit (Surplus) | (87) | 320 | (675) | 728 | 2,566 | 881 | 992 | 449 |

SOURCE: See Table 2

The Structural Deficit is calculated as an average of the annual deficits experienced by Ethiopia during the period 1981/82 - 1986/87, excluding 1984/85, which was considered to be exceptional.

(1) The consumption requirement is derived by multiplying the mid-year population estimate by the average per capita consumption value (156 kgs/person) from Table (Consumption).

(2) Import Requirement = Consumption Requirement - Total Domestic Production (corrected for stock adjustments)

(3) Calculations for net commercial food imports do not include food aid transactions.

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TABLE X
AVERAGE STRUCTURAL DEFICIT
(x000 mt)

| | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | AVG. 1981/82 -1986/87 (excl. 84/85) | 1988 |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---|-------|
| Consumption Requirement (1) | 6,014 | 6,189 | 6,368 | 6,552 | 6,742 | 6,911 | 7,111 | 7,317 | 6,626 | 7,317 |
| Population | 38.55 | 39.67 | 40.82 | 42.00 | 43.22 | 44.30 | 45.58 | 46.9 | 42 | 46.9 |
| Gross Production | | | | | | | | | | |
| Cereals and Pulses | 6,509 | 6,238 | 7,660 | 6,237 | 4,553 | 6,169 | 6,629 | 6,587 | 6,587 | 6,587 |
| Less Seed Requirements | 316 | 314 | 338 | 318 | 283 | 339 | 367 | 335 | 335 | 335 |
| Less Post-Harvest Losses | 976 | 936 | 1,149 | 936 | 683 | 925 | 994 | 988 | 988 | 988 |
| Net Production | 5,217 | 4,988 | 6,173 | 4,983 | 3,587 | 4,905 | 5,268 | 5,263 | 5,263 | 5,263 |
| Plus Enset | 573 | 594 | 609 | 512 | 500 | 500 | 580 | 559 | 559 | 559 |
| Plus Milk Consumption | 279 | 332 | 295 | 304 | 152 | 207 | 235 | 265 | 265 | 265 |
| Total Domestic Production | 6,075 | 5,854 | 7,077 | 5,793 | 4,239 | 5,612 | 6,083 | 6,187 | 6,187 | 6,187 |
| Stock Adjustments | | | | | -306 | 132 | -95 | 7 | 7 | 7 |
| Import Requirement (2) | 61 | 324 | 705 | 753 | 2,809 | 1,157 | 1,154 | 539 | 539 | 1,230 |
| Net Commercial Food Imports (3) | 52 | 4 | 34 | 25 | 243 | 296 | 132 | 83 | 83 | 220 |
| Food Deficit (Surplus) | (87) | 320 | (675) | 728 | 1,566 | 331 | 332 | 449 | 449 | 1,010 |

SOURCE: See Table (CONSUMPTION)

(1) The consumption requirement is derived by multiplying the mid-year population estimate by the average per capita consumption value (156 kgs/person) from Table (Consumption).

(2) Import Requirement = Consumption Requirement - Total Domestic Production (corrected for stock adjustments).

(3) Calculations for net commercial food imports do not include food aid transactions. The estimate for 1987/88 commercial imports is based on a shortened base period (1984/84 - 1986/87) in order to reflect the recent trend towards higher levels of commercial food imports.

| CY 1987 FOOD AID (x000 mt) | | | |
|-------------------------------------|-----------|---------|--------|
| | EMERGENCY | REGULAR | TOTAL |
| Relief Stocks as of January 1, 1987 | 174,000 | 0 | 174000 |
| CY 1987 Arrivals | 377,591 | 98,713 | 476304 |
| Recorded (Jan - Oct) | 139,715 | 52479 | |
| Expected (Nov - Dec) | 237,876 | 46234 | |
| (of which are CY 1988 Commitments) | (114080) | (39534) | |
| CY 1987 Distributions | 360,000 | 59,179 | 419179 |
| Recorded (Jan - Sept) | 220,000 | 52479 | |
| Expected (Oct - Dec) | 140,000 | 6700 | |
| ESTIMATED YEAR END BALANCE 12/31/87 | 191,591 | 39,534 | 231125 |

SOURCE: UN World Food Programme (Addis Ababa) estimates, November 24, 1987.

TABLE X
HISTORICAL DEFICITS

| CROP YEAR | POP (1) (x000) | AVERAGE CONSUMP (2) kg/cap | REQUIRED FOOD LEVEL (x000 mt) | ACTUAL FOOD LEVEL (3) (x000 mt) | DEFICIT BEFORE FOOD AID (x000 mt) | FOOD AID (4) (x000 mt) | DEFICIT AFTER FOOD AID (x000 mt) | AVAILABLE CONSUMP w/ FOOD AID (kg/cap) |
|-----------|-------------------|-------------------------------|----------------------------------|------------------------------------|--------------------------------------|---------------------------|-------------------------------------|---|
| 1980/81 | 38.55 | 156 | 6014 | 6253 | -87 | 152 | -239 | 162 |
| 1981/82 | 39.67 | 156 | 6189 | 6050 | 321 | 182 | 139 | 153 |
| 1982/83 | 40.82 | 156 | 6368 | 7341 | -675 | 298 | -973 | 180 |
| 1983/84 | 42 | 156 | 6552 | 6282 | 728 | 458 | 270 | 150 |
| 1984/85 | 43.22 | 156 | 6742 | 5022 | 2566 | 846 | 1720 | 116 |
| 1985/86 | 44.3 | 156 | 6911 | 6895 | 881 | 865 | 16 | 156 |
| 1986/87 | 45.59 | 156 | 7111 | 6538 | 992 | 419 | 573 | 143 |
| 1987/88p | 46.9 | 156 | 7316 | 6691 | 1625 | 1000 | 625 | 143 |

NOTES:

- (1) From Table (POPULATION)
- (2) From Table (CONSUMPTION): Calculated average level of consumption, 1981/82 - 1986/87 (excl. 1984/85)
- (3) From Table (CONSUMPTION): includes domestic production, net commercial imports and food assistance.
- (4) From Table (CONSUMPTION).
- (5) Assumes distributed food aid level of 1,000,000 metric tons

USAID and FAO FOOD NEED ASSESSMENTS
for ETHIOPIA

BEST
AVAILABLE

The 1988 Total Food Deficit for Ethiopia, as estimated December 10, 1987 by Jeffrey Marzilli of the FNA Project and the USAID mission in Addis Ababa, is 1.63 million metric tons. This is the level of food (cereals, pulses, roots, tubers and milk) necessary (in addition to domestic production, stocks and commercial imports) to maintain the projected population of 46.9 million persons at the level of consumption to which they have become accustomed in the last five years.

In the case of Ethiopia, the U.S. Government requires that a distinction be made between the portion of this deficit which is chronic (that which would have occurred even without drought) and the portion which is extraordinary (in this case, that stemming from the failure of the main season rains). The 1988 assessment estimates the chronic level of deficit at 450,000 metric tons. When this is subtracted from the total deficit of 1.6 million metric tons we are left with the popular number of 1.2 million metric tons of extraordinary (mis-labeled "emergency") deficit.

This number (1.2 million) is NOT comparable to the recent FAO estimated deficit of 1.3 million metric tons. The FAO

estimate is the TOTAL deficit and, therefore, must be compared to USAID's total deficit of 1.6 million metric tons. The reason these numbers appear to diverge is that the FAO estimate is limited to the deficit in cereals and pulses only, whereas the USAID estimate includes all food sources. If the FAO were to expand their estimate to include shortfalls in milk, roots and tubers, their final figure would be similar to that of USAID. However, that similar number would be the 1.6 million metric tons identified above and not the 1.2 million commonly believed.

It must be pointed out that the estimates would still not converge completely. This is primarily due to differing assumptions about the availability and use of Agricultural Marketing Board stocks. FAO analysts believe that the Government of Ethiopia will draw down those stocks by 200,000 metric tons this year (out of 270,000 mt available). The USAID mission does not believe this will be the case but, rather, that a working stock level of the full 270,000 will be maintained. This is consistent with previous behavior. USAID does not consider the FAO assumption to be unreasonable; nor does FAO disagree strongly with USAID's intuition on this matter. The divergence is regarded more as a healthy way to cover all possibilities without really introducing significant discrepancies among the organizations' final analyses.

Finally, the bottom lines of the two assessments would still differ slightly due to USAID's decision to use Central Statistics

Office data wherever it did not differ from USAID or FAO estimates by more than five percent. The reason for this is that the methodologies of all the organizations differ slightly and, therefore, the data they generate are not fully interchangeable for purposes of comparison across years.. Because all information prior to 1985 was collected and analyzed by the CSO according to standard CSO methodology, USAID believes it is beneficial to maintain CSO methodology and estimates wherever possible. In this manner, any inherent biases will remain constant and their effect on the information will be minimized. FAO, although in full agreement with this position, does not enjoy the institutional freedom to do likewise.

BEST
AVAILABLE

| | FAO | AID/1 | | AID/2 | |
|--|------|-------|--------|-------|-------|
| PRODUCTION | | | | | |
| Cereals and Pulses (C/P) | | | | | |
| rain | | | | | |
| Peasant | 4985 | 5019 | -0.7% | 5019 | -0.7% |
| Producer Coops | 265 | 193 | 37.3% | 193 | 37.3% |
| Settlements and Resettlements | 240 | | | 240 | 0.0% |
| State Farms | 290 | 262 | 8.9% | 262 | 8.9% |
| TOTAL | 5770 | 5474 | 5.4% | 5714 | 1.0% |
| Belg | | | | | |
| All Sectors | 265 | 280 | -5.4% | 280 | -5.4% |
| Gross Production C/P | 6035 | 5754 | 4.9% | 5994 | 0.7% |
| Less: Seed/Losses | 995 | 1151 | -13.5% | 955 | 0.0% |
| Net Production C/P | 5040 | 4603 | 9.0% | 4999 | 1.9% |
| STOCK ADJUSTMENTS | | | | | |
| A/C stocks | 50 | | | 50 | |
| Security stocks | 50 | | | 50 | |
| TOTAL AVAILABLE IN 1988 | 5140 | 4603 | 11.0% | 5099 | 1.0% |
| CONSUMPTION REQUIREMENTS | | | | | |
| Total Cereal/Pulse Need | 5754 | 5415 | 5.0% | 5664 | 1.7% |
| CEREAL/PULSE SHORTFALL | 1474 | 1822 | -19.1% | 1410 | 2.6% |
| ANT. COMMERCIAL EXPORTS | 150 | 200 | -25.0% | 150 | 0.0% |
| CEREAL/PULSE AID REQUIRED ¹ | 1324 | 1622 | -19.4% | 1270 | 4.3% |

USAID believes this is double-counting

USAID assumes normal rains but increased area

FAO uses reduced loss values for Ethiopia

USAID assumes 1987's stock will be maintained
FAO uses a stock of 50000 at 1988

FAO uses 1.7% population vs. AID's 1.9%

FAO might be double-counting security stocks

NOTES:

1) USAID/Addis Ababa assessment of December 10, 1987.

2) USAID/Addis Ababa assessment using key 1987 assessment.