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FOOD NEEDS ASSESSMENT: ETHIOPIA

December 1987 & December 1988



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DRAFT

**1988/89 FOOD NEEDS ASSESSMENT
FOR ETHIOPIA**

**Thomas Worrick, USAID/Addis Ababa
Jeffrey Marzilli, The Pragma Corporation**

**Addis Ababa
December 1988**

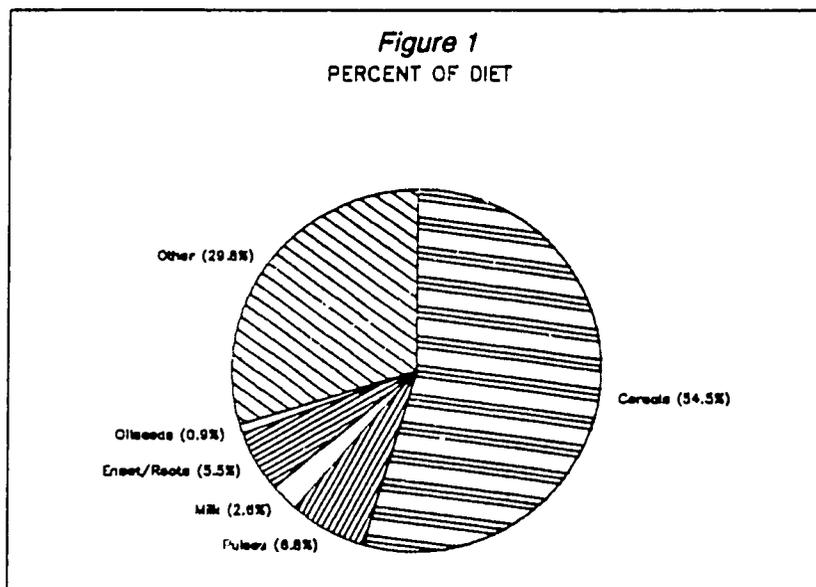
II. METHODOLOGY

Base Period

The base period for the 1988/89 assessment includes crop years 1980/81 to 1983/84. This represents a change over previous AID food needs assessments in Ethiopia and can be defended on several accounts. An attempt has been made to eliminate the methodological inconsistencies that occur when data series include observations not entirely endemic to a particular methodology or analytical approach. In the past, base periods have included data from a number of organizations employing an even greater number of methods for the collection or generation of these data. The 1980/81 - 1983/84 base period used in the current assessment is comprised only of agricultural data systematically collected and analyzed by the Central Statistical Authority of Ethiopia. The CSA methodology remained consistent over this period and the data generated are accepted by AID and FAO alike.

Commodity coverage

The commodities covered in this report differ only slightly from those of previous assessments. The selection of the 1980/81 - 1983/84 base period has allowed for the inclusion of oilseeds in the commodity package. Other food categories include cereals, pulses, roots and tubers, and milk. The major cereals are



teff, barley, maize, sorghum and wheat, while pulses are comprised primarily of horse beans, chick peas and field peas. Roots and tubers include enset (false banana) and potatoes. Together these commodities represent approximately seventy percent of the average daily caloric intake (see Figure 1).

Status Quo Consumption

Consumption per capita is identified in this assessment, as in the past, using the status quo method. Food supply and utilization information was collected and analyzed to obtain an estimate of the aggregate, national level of consumption per capita for each year of the base period. From these figures a base period average was calculated. The base period average, or status quo, consumption per capita is 166 kilograms per year, in unmilled, cereal equivalent terms (see Appendix A.8). Once the addition of oilseeds to this year's analysis is accounted for, this indicates a 5 percent increase over the 156 kilogram per capita status quo consumption estimate used in the 1987/88 assessment. The difference can be attributed almost entirely to the selection of the new 1980/81 - 1983/84 base period.

The analysis of status quo levels of consumption goes beyond that of past reports in that aggregate consumption (166 kilograms) is broken out by its constituent parts: cereals, pulses, milk, roots and tubers, and oilseeds (see Table 2). This detail is intended to provide more precise information on food aid programming opportunities, as well as facilitate the comparison of food balance sheet data across organizations.

TABLE 2
Status Quo Consumption
(unmilled kg/capita)

TOTAL	166.1
Cereals and Pulses	144.8
Cereals	128.2
Pulses	16.6
Other	21.3
Milk	6.3
Roots and tubers	12.6
Oilseeds	2.4

Source: Appendices A.1 - A.8

Seed and Waste Losses

Unlike previous assessments, seed and waste losses in this report are calculated on all domestic production--not just cereals and pulses--and waste adjustments are extended to relief stock balances as well. Seed requirements and post-harvest losses are estimated at 3 percent and 12 percent of gross production, respectively. The waste level in relief stocks is estimated at 2.25 percent.

Unmilled Cereal Equivalent Analysis

Finally, the analysis is undertaken in unmilled, cereal equivalent terms for all commodities. Where milled commodities were encountered, care was taken to convert the particular measure to an unmilled equivalent. Technical conversion factors and assumptions are provided in the footnotes to the tables.

III. ELEMENTS OF THE ASSESSMENT

Main (Meher) Season Production

Higher than normal rainfall from July to October in areas of normally marginal rainfall (Eritrea, Tigray, Wolo, Harerge, and parts of Shoa, Arsi and Sidamo) is expected to result in a Meher crop significantly higher than that of last year. A late start for the Meher rains in maize and sorghum producing areas of the West, as well as excessive rains in the normally high rainfall areas of the Central and Western highlands, will temper the aggregate production increase to about 12 percent over last year (see Table 3).

Teff production is expected to be very good, as this crop is resistant to waterlogging and proved to be a particularly suitable replacement crop for maize and sorghum in areas where the rains came late (Gojam, Gonder Weelega, Illubabor, Keffa, and parts of Shoa, Wollo and Harerge). Although area planted in maize and sorghum was seriously reduced in the West, it is expected that much of this loss will be made up in yield increases for these crops in other areas, particularly Wollo and Shoa. Although serious rust damage has affected the wheat crop in Bale and parts of Arsi, production of wheat is expected to surpass that of last year. Harvests of pulses and oilseeds are expected to be good due to favorable growing conditions and increased government incentives.

TABLE 3
GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES (1)
 By Region, By Sector
 (x000 mt)

REGION	1980 1981	1981 1982	1982 1983	1983 1984	BASE AVG (2)	FACTOR '88/89 (3)	1988 1989
ARSI	425	476	527	424	463	1.1	509
BALE	20	72	96	86	68	1	68
ERITREA	188	188	188	188	188	1.05	197
GAMA GOFA	100	77	108	91	94	1	94
GOJAM	714	732	873	743	765	0.97	742
GONDER	475	516	759	513	566	1	566
HARARGE	329	352	458	339	369	1.2	443
ILLUBABOR	104	129	213	242	172	0.95	163
KEFA	294	208	340	354	299	0.97	290
SHOA	1661	1380	1922	1602	1641	1.1	1805
SIDAMO	140	109	171	159	145	1.2	174
TIGRAY	229	229	229	229	229	1.15	263
WELLEGA	341	395	483	448	417	0.92	384
WELLO	906	795	701	499	726	1.1	798
PEASANT MEHE	5926	5658	7069	5915	6142	6196	6497
STATE FARMS	248	281	254	201	246	0.9	222
COOPERATIVES	66	78	93	122	90	1.12	100
BELG SEASON	218	197	269		171	2.35	402
TOTAL	6453	6214	7684	ERR	ERR	1.12	7221

NOTES:

(1) 1980/81 - 1983/84 production values are taken from CSA, "Time Series Data on Area, Production and Yield of Major Crops", October 1987.

(2) Simple average of production over the base period 1980/81 - 1983/84

(3) USAID/Addis Ababa projection

1989 Secondary (Belg) Season Production

The 1988 Belg, or secondary, season was not favorable due to the lack of adequate rainfall in areas of the country where Belg production is especially important. Wello and Shoa were particularly hard hit. However, since for assessment purposes Belg production is counted with the Meher season immediately preceding it, the only implication of the poor 1988 Belg on the 1988/89 food situation is the failure of the short rains to provide for adequate land preparation and sowing of certain 1988/89 main season crops, notably maize and sorghum. The effect of this has already been discussed above.

At this time, the level of Belg production for 1989 can only be anticipated. An average Belg production is assumed. It must be noted that Belg production levels have increased dramatically, probably as a result of increased planting after the 1984/85 and 1987/88 crises, and are now estimated to fall between 300,000 to 500,000 metric tons on average. The figure 400,000 metric tons will be employed until further information becomes available.

Cereal market prices increased markedly with the failure of the Belg rains in March/April of 1988 and rose steadily through June of that year. After the arrival of the Meher rains in mid June, prices declined once again, presumably in anticipation of a good main harvest.

Pastoral Areas

The food supply situation in the pastoral areas is not expected to improve much over last year. Although the heavy main season rains assure adequate pasture and water supplies for livestock, heavy cattle losses have been reported in some areas, particularly Gojam and Gonder. Climatic shock is considered the most important factor behind cattle losses; cattle in a weakened state from the long dry season were subjected to abnormally heavy rain and cold weather. Trypanosomiasis remains a problem in many areas, and herd levels have probably not fully recovered from the widespread losses incurred during the 1984/85 drought. For these reasons, the estimate of milk offtake is maintained at the same level as last year.

Agricultural Marketing Board (AMC) Stocks

The Agricultural Marketing Board (AMC) reported a high level of procurement in the financial year ending June 30, 1988. In April 1988, AMC stocks reached their highest level ever, 666,000 metric tons (see Table 4). Higher than expected sales in the latter half of 1988 are expected to result in a December 31, 1988 carryover of about 300,000 metric tons, a net drop of 150,000 metric tons over opening stock levels on January 1, 1988. It is not expected that closing stock levels at December 31, 1989 will be significantly higher or lower than opening levels. Therefore, no AMC stock contribution to consumption is anticipated in 1988/89.

TABLE 4
Agricultural Marketing Corporation Stocks
(metric tons)

COMMODITY	MAY 15, 1987	SEPT 15, 1987	JAN 31, 1988	APR 30, 1988	JUN 30, 1988	SEPT 30, 1988
Teff	42547	30200	26673	52075	46918	30660
Wheat	176815	142214	193403	231146	210879	173710
Barley	51911	45144	53139	67697	62493	42154
Sorghum	45052	36481	35949	42538	31540	16452
Maize	171041	142586	155259	250440	229235	152895
Other cereals	652	441	5810	5725	5500	1336
CEREALS	488018	397086	470233	649621	586565	417207
PULSES	14719	7918	8012	8514	6806	5132
OILSEEDS	12362	2406	8453	7506	6370	4448
TOTAL	515099	407390	486698	665641	599741	426787

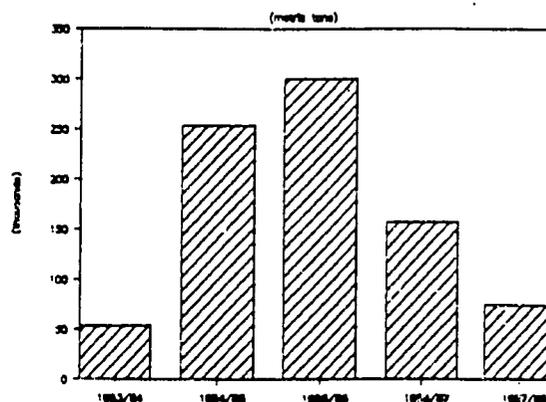
Source: CSA estimate, December 1, 1988

Commercial food exports and imports

Food exports will remain at a minimum this year, with only 25,000 metric tons of pulse exports expected. Given the relatively high level of domestic food production this year, the large quantities of relief and commercial carryover stocks, and the ever-intense competition for foreign exchange, commercial food imports will probably be low as well. The GPDRE has even alluded to the possibility of not contracting for any commercial food deliveries this year. Given past levels of commercial food imports, even in years of reasonably good harvests, it appears unlikely that commercial food imports would fall to zero (see Figure 3). Until more information becomes available, an estimate of 50,000 metric tons of commercial food imports will be used.

Figure 3
Commercial Food Imports

Registered Food Imports (thousand metric tons)	
1983/84	53
1984/85	253
1985/86	300
1986/87	157
1987/88	75
Average	168



Source: Appendix A.8

Food Aid

It is uncertain whether there will be any significant new appeals for or commitments of non-refugee emergency food aid in 1989. A large quantity of 1988 relief food is still in storage in the ports and up country. Stock carryovers of about 450,000 metric tons are expected on December 31, 1988. Of the 450,000 metric tons of relief stock available on January 1, 1989, it is estimated that approximately 10,000 metric tons will be lost to waste, 40,000 metric tons will be used to pay back loans extended from AMC or Food Security Reserve stores and 25,000 metric tons will be diverted to 1989 regular programs. The remaining 375,000 metric tons will be available for 1989 emergency programming (see Table 5). Of this 375,000 metric tons available, 150,000 metric tons might go to the Food Security Reserve. Regular program food aid is currently estimated at 150,000 metric tons, 25,000 metric tons of which are likely to come from 1988 emergency food aid carryovers.

TABLE 5
CY 1988 RELIEF STOCK CARRYOVERS
(metric tons)

Carryover (Dec 31, 1988) (1)	450000
Storage losses (2)	10000
AMC swaps/repayments (3)	40000
Diversions to Regular Programs	25000
CY 1988 relief stocks available in CY 1989	375000

NOTES:

- (1) Based on WFP/Addis Ababa estimate of 400,000-500,000 mt December 1, 1988
- (2) Based on WFP/Addis Ababa estimate of 2-3% storage losses
- (3) USAID/Addis Ababa estimate; accounted for in AMC Stock contribution

1988/89 Food Deficit

Using the standard food balance sheet methodology and the consumption, production, stock and trade assumptions outlined above, the 1988/89 food deficit is estimated at 770,000 metric tons (see Table 1). After adjustments for likely food aid contributions, this deficit is reduced to 420,000 metric tons. It should be noted that this is an estimated aggregate deficit based on apparent historical consumption and can only be evaluated in a specific, or situational context. This deficit should not necessarily be taken as a recommendation or indication of food aid programming needs.

A food deficit can be addressed in several manners. All or part of a deficit can be ignored in instances where the per capita shortfall (1.6 kilograms in this case) is insignificant, acute (not recurring), and distributed evenly across the population. A deficit can also be curtailed domestically, through an increase in commercial imports or food stock drawdowns, and/or externally, through the contribution of food aid from abroad. The amount of the deficit that should be addressed, if any, can only be prescribed by those with a rigorous knowledge and understanding of the specific country situation.

IV. ISSUES

Pricing policy

In early 1988 the GPDRE raised grain procurement prices slightly and began to license grain traders in surplus areas. Traders were allowed to market half their purchases at free market prices after first offering half to the AMC at the controlled price. While the effect of this policy cannot be adequately assessed until the current main harvest is marketed, it appears to have had some effect in reducing prices in Addis Ababa and should increase average prices to farmers. The GPDRE also recently announced that the laws would be changed to promote private investment in agriculture.

Nutrition

During 1988 the basic needs of most people were met to the extent that very little famine-induced migration was observed. It is widely assumed that nutritional status declined in parts of Eritrea, Tigre and northern Wello and Gonder after April, when large areas were under rebel control and NGO and government distributions were halted. In other parts of the country, where surveys were carried out, nutrition levels appear to have been maintained (except for small pockets in Hararghe, northern Shoa and Bale).

During 1989 we may expect a slightly better general level of nutrition. In the normally surplus areas in the West, the slight drop in production is not expected to have adverse effects. In Eritrea, Tigre, Wello and Hararghe, better than normal production should result in better food supplies and better nutrition.

Refugees

The UNHCR planning figure for refugees is 350,000 in the East and 420,000 in the West for a total of 770,000 refugees. While this may prove a bit high, after a more accurate count in the East, it will be used as the official estimate until a better number is available. This population will require 110,000 to 130,000 metric tons of relief food during calendar year 1989. Refugee numbers, food requirements, aid deliveries and consumption are separated from the national balance sheet analysis.

APPENDIX A.1
PER CAPITA CONSUMPTION
Cereals and Pulses
(x000 mt)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	6,458	6,214	7,684	6,238	6,648
- Seed Requirements (2)	291	280	346	281	299
- Post-Harvest Losses (3)	775	746	922	749	798
= Net Domestic Production	5,392	5,189	6,416	5,209	5,551
- Net Change in Stocks					
- Food Exports	25	35	36	28	31
= Domestic Food Supply	5,367	5,154	6,380	5,181	5,520
+ Commercial Imports	51	39	2	53	36
+ Food Aid	152	182	298	458	273
= Total Food Supply	5,570	5,375	6,680	5,692	5,829
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	144.5	135.5	163.7	135.5	144.8

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

- (1) CSA, "Time Series Data on Area, Production and Yield of Major Crops," October, 1987.
(2) Seed requirement estimated at 5% of gross production.
(3) Post-harvest losses estimated at 12% of gross production

APPENDIX A.2
PER CAPITA CONSUMPTION
Cereals
(x000 mt)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	5,610	5,394	6,718	5,527	5,812
- Seed Requirements (2)	252	243	302	249	262
- Post-Harvest Losses (3)	673	647	806	663	697
= Net Domestic Production	4,685	4,504	5,610	4,615	4,853
- Net Change in Stocks	na	na	na	na	na
- Food Exports	0	0	0	0	0
= Domestic Food Supply	4,685	4,504	5,610	4,615	4,853
+ Commercial Imports	51	39	2	53	36
+ Food Aid	152	182	298	458	273
= Total Food Supply	4,888	4,725	5,910	5,126	5,162
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	126.8	119.1	144.8	122.0	128.2

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(1) CSA, "Time Series Data on Area, Production and Yield of Major Crops," October, 1987.

(2) Seed requirement estimated at 4.5% of gross production.

(3) Post-harvest losses estimated at 12% of gross production

APPENDIX A.3
PER CAPITA CONSUMPTION
Pulses
(x000 mt)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	848	820	965	711	836
- Seed Requirements (2)	38	37	43	32	38
- Post-Harvest Losses (3)	102	98	116	85	100
= Net Domestic Production	708	685	806	594	698
- Net Change in Stocks	na	na	na	na	na
- Food Exports	25	35	36	28	31
= Domestic Food Supply	683	650	770	566	667
+ Commercial Imports	0	0	0	0	0
+ Food Aid	0	0	0	0	0
= Total Food Supply	683	650	770	566	667
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	17.7	16.4	18.9	13.5	16.6

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

- (1) CSA, "Time Series Data on Area, Production and Yield of Major Crops," October, 1987.
(2) Seed requirement estimated at 4.5% of gross production.
(3) Post-harvest losses estimated at 12% of gross production

APPENDIX A.4
PER CAPITA CONSUMPTION
Milk
(x000 mt, cereal equiv.)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	279	282	295	304	290
- Post-Harvest Losses (2)	33	34	35	36	35
= Net Domestic Production	246	248	260	268	255
- Net Change in Stocks	na	na	na	na	na
- Food Exports	0	0	0	0	0
= Domestic Food Supply	246	248	260	268	255
+ Commercial Imports	0	0	0	0	0
+ Food Aid	0	0	0	0	0
= Total Food Supply	246	248	260	268	255
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	6.4	6.3	6.4	6.4	6.3

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(1) USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(2) Post-harvest losses estimated at 12% of gross production

APPENDIX A.5
PER CAPITA CONSUMPTION
Roots and Tubers
(x000 mt, cereal equiv.)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	579	594	609	512	574
- Post-Harvest Losses (2)	69	71	73	61	69
= Net Domestic Production	510	523	536	451	505
- Net Change in Stocks	na	na	na	na	na
- Food Exports	0	0	0	0	0
= Domestic Food Supply	510	523	536	451	505
+ Commercial Imports	0	0	0	0	0
+ Food Aid	0	0	0	0	0
= Total Food Supply	510	523	536	451	505
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	13.2	13.2	13.1	10.7	12.6

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(1) USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(2) Post-harvest losses estimated at 12% of gross production

APPENDIX A.6
PER CAPITA CONSUMPTION
Oilseeds
(x000 mt, cereal equiv.)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
Gross Domestic Production (1)	115	92	137	111	114
- Seed Requirement (2)	5	4	6	5	5
- Post-Harvest Losses (3)	14	11	16	13	14
= Net Domestic Production	96	77	114	93	95
- Net Change in Stocks	na	na	na	na	na
- Food Exports	0	0	0	0	0
= Domestic Food Supply	96	77	114	93	95
+ Commercial Imports	0	0	0	0	0
+ Food Aid	0	0	0	0	0
= Total Food Supply	96	77	114	93	95
/ Population (x000)	38,548	39,666	40,816	42,000	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	2.5	1.9	2.8	2.2	2.4

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(1) CSA, "Time Series Data on Area, Production and Yield of Major Crops," October 1987.

Cereal equivalent calculated using a milling extraction rate of .45, and a cereal/oil caloric equivalent of 2.50 (8750 cal/kg:3500 cal/kg).

(2) Seed requirement estimated at 4.5% of gross production.

(3) Post-harvest losses estimated at 12% of gross production

APPENDIX A.7
GROSS DOMESTIC AGRICULTURAL PRODUCTION, 1980/81 - 1983/84
Major Crops, All Sectors, Meher and Belg Seasons
(x000 metric tons)

	1980/81	1981/82	1982/83	1983/84	AVERAGE
CEREALS	5,610	5,394	6,718	5,527	5,812
Teff	1,312	1,083	1,372	1,090	1,214
Barley	1,075	936	1,168	814	998
Wheat	613	707	917	666	726
Maize	948	1,200	1,603	1,533	1,321
Sorghum	1,411	1,207	1,356	1,202	1,294
Millet	204	197	240	199	210
Oats	46	65	62	22	49
PULSES	848	820	965	711	836
Horse Beans	469	470	601	389	482
Chick Peas	118	101	118	118	114
Haricot Beans	20	12	37	42	27
Field Peas	148	163	133	111	139
Lentils	60	52	42	29	46
Vetch	31	21	34	23	27
Soya Beans	2	1	1	0	1
CEREALS and PULSES	6,458	6,214	7,684	6,238	6,649
OTHER	960	958	1,026	915	965
Oil seeds	102	82	122	99	101
Roots/tubers (1)	579	594	609	512	574
Milk (1)	279	282	295	304	290
TOTAL	7419	7172	8709	7153	7613

SOURCE: Central Statistical Authority, "Time Series Data on Area, Production and Yield of Major Crops", October 1987. (Statistical Bulletin 56).

(1) USAID/Addis Ababa, "1988 Food Needs Assessment for Ethiopia", December, 1987; in unmilled cereal equivalents

APPENDIX A.8
PER CAPITA CONSUMPTION
All Major Food Items
(x000 mt)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	AVG. (1)
Gross Production, Cereals and Pulses (2)	6,458	6,214	7,684	6,238	4,752	6,169	6,629	5,664	6,648
- Seed Requirements (3)	291	280	346	281	214	278	298	255	na
- Post-Harvest Losses (4)	775	746	922	749	570	740	795	680	na
= Net Production, Cereals and Pulses	5,392	5,189	6,416	5,209	3,968	5,151	5,535	4,729	5,551
+ Net Production, Enset/Roots(5)	481	493	505	425	415	415	481	457	476
+ Net Production, Milk (6)	232	234	245	252	126	172	195	249	241
+ Net Production, Oilseeds (7)	85	62	101	82	86	84	84	84	na
= Net Production, All Major Food Items	6,189	5,984	7,267	5,968	4,595	5,822	6,296	5,519	6,352
- Net Change in Stocks	na	na	na	na	306	(132)	96	176	na
- Food Exports	25	35	36	28	10	14	25	25	31
= Domestic Food Supply	6,164	5,949	7,231	5,940	4,279	5,940	6,175	5,318	6,321
+ Commercial Imports	51	39	2	53	253	300	157	75	36
+ Food Aid	152	182	298	458	846	1,000	476	1,200	273
= Total Food Supply	6,367	6,170	7,531	6,451	5,378	7,240	6,808	6,593	6,630
/ Population (x000) (8)	38,548	39,668	40,816	42,000	43,218	44,471	45,761	47,088	na
= PER CAPITA CONSUMPTION (unmilled kg/year)	165	158	185	154	124	163	149	140	168

SOURCE: USAID/Addis Ababa, "1988 Emergency Food Needs Assessment for Ethiopia," December 1987.

(1) Average is calculated for base period, 1980/81 - 1983/84.

(2) For 1980/81 - 1984/85: CSA, "Time Series Data on Area, Production and Yield of Major Crops," October, 1987.

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

For 1986/87 - 1987/88: USAID/Addis Ababa, "1988 Food Needs Assessment for Ethiopia," December 1987. (1987/88 corrected for final Belg season estimates.

(3) Seed Requirements estimated at 4.5% of gross production

(4) Post-harvest losses estimated at 12% of gross production

(5) Cereal equivalent terms.

(5) Cereal equivalent terms.

(7) For 1980/81 - 1985/86, CSA, "Time Series Data on Area, Production and Yield of Major Crops," October 1987.

For 1986/87 and 1987/88, the average of the base period 1980/81 - 1983/84 is used. Gross values are adjusted to reflect 4.5% seed requirement and 12% post-harvest losses; all values are in cereal equivalent terms.

(8) Population has been calculated based on an estimated 2.9% population growth rate and the 1984 census figure of 42 million persons.

USAID and FAO FOOD NEED ASSESSMENTS
for ETHIOPIA

December 10, 1987

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 (mislabeled "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.

TABLE 1
1987/88 FOOD DEFICIT

A.	Normal Consumption (1) 156 kg/person 46.9 million people	7,316
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 - Q)	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

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 15% 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	1981 1982	1982 1983	1983 1984	1984 1985	1985 1986	1986 1987	AVERAGE 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	+83	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 3

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

REGION	CSO/FIS (1)	CSO/FIS (2)	1987/88
	ACTUAL 1986/87	ESTIMATE 1987/88	AS % OF 1986/87
ARSI			
BALE	457	332	73%
ERITREA	60	48	80%
GAMA GOFA	135	43	32%
GOJAM	77	70	91%
GONDER	780	796	102%
HARARGE	384	385	100%
ILLUABOR	446	269	60%
KEFA	148	160	108%
SHOA	461	461	100%
SIDAMO	1685	1568	93%
TIGRAY	265	226	85%
WELLEGA	150	75	50%
WELLO	325	362	111%
	374	224	60%
PESANT MEHER			
	5747	5019	87%
STATE MEHER			
COOP MEHER	327	262	80%
TOTAL BELG (3)	220	193	88%
	335	280	84%
(errors/omissions)	0	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, Main 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	539
BALE	146	136	198	130	123	152	158	159
ERITREA	188	188	188	188	94	126	188	175
GAMA GOFA	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 GOFÁ	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%	1,690
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 -1986/87 (excl. 84/85)
	1981	1982	1983	1984	1985	1986	1987	
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	975	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)	32	(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.

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

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1988 CONSUMPTION IS ESTIMATED AT 178 KILOGRAMS OR 1,700 CALORIES PER CAPITA/PER DAY (556 KG/YEAR FROM MAJOR SOURCES).

INFO FYA-01 FFP-09 FVPP-01 /011 A3 211

ACTION OFFICE AFEA-03

INFO AAAP-03 AFCD-02 AFDP-06 SEOP-01 FPA-02 AFPO-04 SERP-01
AFTR-05 OFDA-02 SECS-02 FM-02 AAXA-01 STAG-02 SAST-01
ES-01 AGRI-01 COM-02 OMB-02 RELD-01 TELE-01 TRSY-01
/046 A3 211

THE CALCULATION OF THE CY 1988 EMERGENCY FOOD NEED IS SHOWN BELOW IN METRIC TONS (000'S).

INFO LOG-00 EUR-00 AF-00 CIAE-00 EB-00 DDOE-00 10-19
TRSE-00 FORE-01 AGRE-00 /020 V

- NORMAL CONSUMPTION	7,316
- NET PRODUCTION (CEREAL & PULSES)	4,582
- OTHER FOODS (ENSET, POTATOES & MILK)	934
- TOTAL DOMESTIC FOOD	5,516
- IMPORT REQUIREMENT	1,800
- LESS COMMERCIAL IMPORTS (NET)	175
- TOTAL FOOD DEFICIT	1,625
- STRUCTURAL DEFICIT	449
- REGULAR FOOD AID	167
- UNCOVERED STRUCTURAL DEFICIT	297
- CY 1988 DEFICIT	4,176
- CARRYOVER STOCKS & 1987 PLEDGES	
- YET TO ARRIVE	300
- CY 1988 EMERGENCY DEFICIT	868

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TO SECSTATE WASHDC IMMEDIATE 0815
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

GIVEN THE MARGINS OF ERROR INVOLVED, THE EMERGENCY FOOD NEED FOR CY 1988 SHOULD BE ABOUT 900,000 MT. IF NO STEPS ARE TAKEN TO MEET THE UNCOVERED STRUCTURAL DEFICIT, THE OVERALL NEED IS 1,160,000 MT. (SEE TABLE 1 FOR MORE DETAIL)

UNCLAS SECTION 01 OF 11 ADDIS ABABA 05228

ATDAG

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDSO; ROME FOR FOODAG

ETHIOPIA'S LARGE AND GROWING STRUCTURAL FOOD DEFICIT IS CAUSE FOR GROWING CONCERN. THIS DEFICIT FOR 1988 IS ESTIMATED AT 449,000 MT. BECAUSE "NORMAL" IS SUCH A DIFFICULT CONDITION TO DEFINE IN ETHIOPIA'S CLIMATIC DIVERSITY, IT IS POSSIBLE TO PRESENT THIS DEFICIT IN A RANGE FROM 400,000 - 500,000 MT. (SEE TABLE 5.)

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

EXECUTIVE SUMMARY

THE CY 1988 EMERGENCY FOOD AID REQUIREMENT FOR ETHIOPIA IS ESTIMATED AT 868,000 MT

ETHIOPIA'S COMMERCIAL IMPORTS OF FOOD HAVE BEEN HISTORICALLY LOW BUT GROWING RAPIDLY. IN 1986/87, WITH MUCH HIGHER COFFEE PRICES AND A BETTER FOREIGN

THE PROVISION OF 868,000 MT OF FOOD TO ETHIOPIA WOULD ENSURE CONSUMPTION AT OR SLIGHTLY BELOW 1979-83 LEVELS. WHILE THIS LEVEL IS NOT ADEQUATE BY INTERNATIONAL STANDARDS, IT DOES REFLECT THE NORMAL (AND DECLINING) FOOD SITUATION IN ETHIOPIA IN THE 1980'S.

PRODUCTION OF CEREALS AND PULSES HAS BEEN NORMAL TO ABOVE NORMAL IN 7 REGIONS (GOJAM, GONDER, BALE, KEFA, SIDAMO, ILLUBABER AND WELLEGA). PRODUCTION REMAINED WELL BELOW NORMAL IN HARARGHE, WELLO, NORTHERN SHEWA, RIFT SHEWA, ERITREA AND TIGRAY. OVERALL PRODUCTION IS ESTIMATED 13 PERCENT BELOW THE NORMAL EXPECTED FOR 1987/88. (SEE TABLE 3)

GIVEN THE LACK OF TRANSPORT INFRASTRUCTURE, GOVERNMENT POLICY CONCERNING FOOD TRADE AND THE LACK OF PURCHASING POWER IN THE DESTITUTE POPULATIONS, IT IS NOT EXPECTED THAT SMALL SURPLUSES IN SEVERAL REGIONS WILL REDUCE FOOD AID NEEDS.

PER CAPITA CONSUMPTION IN ETHIOPIA HAS BEEN DECLINING FOR 18 YEARS. THE AVERAGE PER CAPITA CONSUMPTION, BASED ON THE 1981/82-1986/87 EXCLUDING 1984/85) CONSUMPTION OF CEREALS, PULSES, ENSET (OR FALSE BANANA, THE MAJOR ROOT CROP) AND MILK, IS 1490 CALORIES. AN ADDITIONAL 207 CALORIES ARE PROVIDED BY MINOR FOOD SOURCES, FOR A TOTAL OF 1705 CALORIES. THE CEREAL EQUIVALENT PER CAPITA CONSUMPTION OF THE FOUR FOODS IS 429 GRAMS PER DAY, OR 156 KILOGRAMS PER YEAR. WITH THE MINOR SOURCES THIS IS RAISED TO 170 KILOGRAMS/YEAR PER CAPITA DURING THE BASE PERIOD. NATIONAL CONSUMPTION IS ADJUSTED UPWARD BY 2.9 PERCENT POPULATION GROWTH OVER THE BASE PERIOD. 1988 POPULATION IS ESTIMATED AT 46.9 MILLION. IN ORDER TO ALLOW FOR THE CONTINUING DECLINING TREND IN CONSUMPTION FROM THE BASE PERIOD,

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ACTION OFFICE AFEA-03

INFO AAAP-03 AFCD-02 AFDP-06 CEOP-01 FPA-02 AFPO-04 SERP-01
AFTR-05 OFDA-02 SEOS-02 FM-02 AAKA-01 STAG-02 SAST-01
ES-01 AGRI-01 COM-02 OMB-02 RELO-01 TELE-01 TRSY-01
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INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

UNCLAS SECTION 02 OF 11 ADDIS ABABA 05228

AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REOS; ROME FOR
FOOAG

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

EXCHANGE POSITION, THESE IMPORTS WERE AT 300,000 MT. THESE IMPORT LEVELS OR HIGH LEVELS WHICH REFLECT AN UNDERSTANDING OF THE UNDERLYING DEFICIT SHOULD BE ENCOURAGED. WHILE THESE IMPORTS AND THE QUOTE NORMAL UNQUOTE DEFICIT COULD LIKELY BE ELIMINATED BY POLICIES WHICH ENCOURAGE PRODUCTION AND TRADE, SUCH POLICY ACTIONS SEEM UNLIKELY AT THIS TIME.

INTRODUCTION

THIS REPORT ESTIMATES ETHIOPIA'S FOOD DEFICIT FOR 1988. UNLESS OTHERWISE STATED, ALL DISCUSSION AND ESTIMATES ARE FOR CALENDAR YEAR 1988 (JANUARY TO DECEMBER).

THE ETHIOPIAN CROPPING YEAR INCLUDES A MAIN (MEHR) SEASON, HARVESTED LATE IN THE CALENDAR YEAR (NOVEMBER - DECEMBER), AND A SECONDARY (BELG) SEASON, WHICH IS HARVESTED AROUND MID-YEAR (JUNE - JULY). FOR THIS REASON, AGRICULTURAL DATA IS OFTEN PRESENTED IN A SPLIT-YEAR FORMAT (I.E. 1986/87, 1987/88) FOR PRACTICAL REASONS AND TO ENSURE COMPARABILITY WITH PREVIOUS REPORTS, WE SHALL ASSUME BOTH HARVESTS ARE CONSUMED IN THE LATTER YEAR OF THE SPLIT-YEAR INDICATED.

THIS REPORT ESTIMATES THE 1988 FOOD DEFICIT BY CONSTRUCTING A NATIONAL FOOD BALANCE SHEET. THE NATIONAL FOOD BALANCE SHEET COMPARES AGGREGATE CONSUMPTION REQUIREMENTS TO AGGREGATE FOOD AVAILABILITY (CARRYOVER STOCKS, PRODUCTION, AND COMMERCIAL FOOD IMPORTS). THE DIFFERENCE BETWEEN THESE TWO AGGREGATES CONSTITUTES THE FOOD DEFICIT. THE NATIONAL FOOD BALANCE SHEET IS USEFUL IN ESTIMATING OVERALL NATIONAL FOOD REQUIREMENTS BUT IT HAS SEVERAL WEAKNESSES WHICH NEED TO BE RECOGNIZED AND WHICH ARE DISCUSSED LATER.

THE NATIONAL FOOD BALANCE SHEET APPROACH DIFFERS FROM THE APPROACHES TAKEN BY THE ETHIOPIAN RELIEF AND REHABILITATION COMMISSION (IRC), NGOs AND OTHER

ORGANIZATIONS IN ESTIMATING FOOD NEEDS. THE IRC AND NGOs BASE THEIR ESTIMATES ON AN ENUMERATION OF PEOPLE IN VARIOUS NEED CATEGORIES. THEY BUILD UP FROM NUMBERS OF PEOPLE IN NEED TO TONS OF FOOD REQUIRED TO MEET THEIR NEEDS. THE NGOs DO THIS FOR SPECIFIC LOCALITIES, WHILE THE IRC (BASED ON PEASANT ASSOCIATION AND WOREDA ESTIMATES) COMES UP WITH AN ESTIMATE OF TOTAL NEEDY PEOPLE IN THE ENTIRE COUNTRY. THE METRIC TONNAGE OF FOOD REQUIRED TO MEET THESE PEOPLE'S NEEDS THEN BECOMES THE IRC'S FOOD NEED ESTIMATE.

OTHER ORGANIZATIONS HAVE CALCULATED A CROP PRODUCTION SHORTFALL, WHICH SHOULD NOT BE CONFUSED WITH THE FOOD DEFICIT. THE FAO CROP ASSESSMENT MISSION IN NOVEMBER 1987, AS WELL AS THE CENTRAL STATISTICS OFFICE'S ... (CSO) ON-GOING FOOD INFORMATION SYSTEM (FIS) PROJECT BOTH ASSESSED SHORTFALLS IN CROP PRODUCTION. THE BENCHMARK IN THESE CASES IS NEITHER PRODUCTION NOR NUMBERS OF AFFECTED PEOPLE, BUT RATHER AGGREGATE FOOD PRODUCTION IN A GIVEN YEAR. IT SHOULD BE NOTED THAT BOTH FAO AND CSO/FIS INTEND THEIR ESTIMATES ONLY AS CROP PRODUCTION ESTIMATES, NOT AS ESTIMATES OF FOOD NEED.

SOUND PLANNING AND DISTRIBUTION OF EMERGENCY FOOD REQUIRES A COMBINATION OF ALL THREE APPROACHES. ANY ONE OF THEM ALONE IS INADEQUATE FOR REASONS DISCUSSED BELOW. THE CROP PRODUCTION SHORTFALL ESTIMATE IS A CRITICAL COMPONENT IN BUILDING A NATIONAL FOOD BALANCE SHEET. HOWEVER, BY ITSELF IT SHOULD NOT BE USED AS AN ESTIMATE OF FOOD NEED. SINCE IT IGNORES SEVERAL IMPORTANT SOURCES OF FOOD: COMMERCIAL FOOD IMPORTS, INTERREGIONAL TRADE, MILK PRODUCTION OF HERDERS, AND FOOD STOCKS. THE NATIONAL FOOD BALANCE SHEET APPROACH, WHICH IS USED IN THIS REPORT, HAS SEVERAL WEAKNESSES. IT IMPLICITLY ASSUMES THAT SURPLUS PRODUCTION WILL FLOW TO DEFICIT AREAS. IN FACT, THIS WILL NOT TAKE PLACE IF MARKETING

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INFO AAAP-03 AFCD-02 AFDP-06 SEOP-01 FPA-02 AFEO-02 AFPC-04
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TRST-01 /018 A3 211

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TO SECSTATE WASHDC IPMEDIATAE 0317
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

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AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NA.NROBI FOR RECSO; ROPE FOR
FOGAG

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

POLICY DOES NOT ALLOW ADJUSTMENTS. IF ON-FARM STOCKS IN
SURPLUS AREAS ARE REDUCED FOLLOWING A BAD YEAR, IF THE
PURCHASING POWER OF DEFICIT AREAS IS LIMITED, OR IF
SURPLUS PRODUCTION IS DIVERTED TO RELATIVELY FAVORED
POPULATIONS. ALL FOUR SITUATIONS CAN BE FOUND IN
ETHIOPIA.

ANOTHER PROBLEM WITH THE NATIONAL FOOD BALANCE SHEET
APPROACH IS THAT IT CANNOT FORECAST LEVELS OF
SUPPLEMENTARY FEEDING REQUIRED TO RESTORE SERIOUSLY
UNDERNOURISHED PEOPLE TO THEIR PREVIOUS NUTRITIONAL
STATUS. SUCH ANALYSIS MUST BE UNDERTAKEN AT THE
DISAGGREGATE LEVEL.

THE FINAL PROBLEM WITH THE FOOD BALANCE SHEET APPROACH
IS THAT IT PROVIDES NO GUIDANCE AS TO WHERE FOOD AID IS
TO BE DISTRIBUTED ONCE IT GETS TO THE PORT OR THE
REGIONAL WAREHOUSE. DECISIONS ON WHERE AND TO WHOM
EMERGENCY FOOD RELIEF IS TO BE DISTRIBUTED NEED TO BE
BASED ON THE KIND OF ENUMERATION OF NEEDY PEOPLE WHICH
RRC AND NGOs UNDERTAKE. HOW WELL FOOD IS TARGETED ON
THOSE WHO NEED IT, OF COURSE, DEPENDS CRITICALLY ON THE
QUALITY OF THE ENUMERATION SYSTEM.

THE ENUMERATION APPROACH BY ITSELF, HOWEVER, IS
INADEQUATE IN ESTIMATING THE AGGREGATE FOOD DEFICIT AND
IS LIKELY TO OVERSTATE OR UNDERSTATE THAT DEFICIT.
THIS IS BECAUSE IT MAY IGNORE SURPLUS PRODUCTION
AVAILABLE IN COUNTRY, NORMAL COMMERCIAL IMPORTS OF
FOOD, AND THE NORMAL FOOD NEEDS OF PEOPLE IN FOOD
DEFICIT AREAS WHICH ARE NUTRITIONALLY DEPRIVED BUT NOT
STARVING.

THE AGGREGATE FOOD BALANCE SHEET APPROACH IS USED IN
THIS ANALYSIS TO ESTIMATE THE OVERALL FOOD DEFICIT IN
ETHIOPIA FOR 1988. THE BASE PERIOD HAS BEEN CHANGED
SIGNIFICANTLY FROM PREVIOUS REPORTS DUE TO THE
INCREASED AVAILABILITY AND ACCURACY OF AGRICULTURAL
DATA. THE BASE PERIOD NOW INCLUDES THE
MOST-RECENT SEVEN YEAR PERIOD, EXCLUDING 1984/85, WHICH
IS CONSIDERED EXCEPTIONAL. WHERE ESTIMATES OF THE

ETHIOPIAN CENTRAL STATISTICS OFFICE (CSO) DO NOT VARY
FROM THOSE OF OTHER ORGANIZATIONS BY MORE THAN 5
PERCENT, CSO FIGURES ARE USED. ONLY 1985/86 CROPPING
YEAR DATA ARE TAKEN FROM A SOURCE OTHER THAN CSO. IT
IS INTENDED THAT THESE METHODOLOGICAL ADJUSTMENTS OVER
PREVIOUS STUDIES WILL RENDER THE DATA MORE INTERNALLY
CONSISTENT AND COMPARABLE ACROSS TIME PERIODS.

THE ESTABLISHMENT OF THE FOOD INFORMATION SYSTEM
PROJECT WITH ASSISTANCE OF FAO IS DESIGNED TO IMPROVE
THE FLOW OF INFORMATION ON CROP PRODUCTION AND THE FOOD
SITUATION IN THE COUNTRY. THAT PROJECT IS NOW IN ITS
SECOND YEAR AND ITS INFORMATION AND DATA WHICH COMBINE
CSO, MOA, NNSA, AND AND RRC OUTPUTS SHOULD BE
INCREASINGLY ACCEPTED.

II. CONSUMPTION

CONSUMPTION IS ESTIMATED IN MILLED CEREAL-EQUIVALENT
TERMS WITH THE KILOGRAMS AND ENERGY (CALORIES) PER
CAPITA DERIVED. THE ESTIMATE IS AN AGGREGATE NATIONAL
CONSUMPTION, BASED ON NET FOOD PRODUCTION, IMPORTS AND
STOCK ADJUSTMENTS IN THE BASE PERIOD ADJUSTED UPWARD
FOR POPULATION GROWTH. IN ADDITION TO CEREAL
CONSUMPTION, THIS CALCULATION INCLUDED PULSES, ENSET OR
FALSE BANANA (THE MAJOR ROOT CROP) POTATOES, AND MILK
PRODUCTS, IN CEREAL EQUIVALENT TERMS. MEAT, EGGS,
VEGETABLES AND OIL SEEDS HAVE BEEN CONSIDERED MINOR AND
STABLE COMPONENTS OF CONSUMPTION AND ARE NOT INCLUDED
IN THESE CALCULATIONS. MORE WORK IN THIS AREA MAY
PROVE THESE FOODS TO BE OF MORE SIGNIFICANCE THAN
PREVIOUS ESTIMATES.

THE PRODUCTION DATA USED FOR THESE BASE PERIOD
ESTIMATES ARE THE THOSE COLLECTED BY THE CENTRAL
STATISTICS OFFICE (EXCEPT FOR 1985/86 WHERE FAO CROP
MISSION ASSESSMENT TEAM ESTIMATES ARE CONSIDERED MORE
ACCURATE). SOME OBSERVERS BELIEVE THE CSO STATISTICS
OVERSTATE YIELDS AND UNDERSTATE AREA. THE FACT THAT

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IT HAS BEEN FURTHER ESTIMATED THAT ABOUT 21.7 KILOGRAMS GRAIN EQUIVALENT COMES FROM MINOR SOURCES (MEAT, EGGS, VEGETABLES, ETC.) (UN ASSISTANT SECRETARY GENERAL, . . . DECEMBER 18, 1984). THE COMBINED 178 KILOGRAMS PER YEAR IS EQUIVALENT TO 1,789 CALORIES A DAY. WHILE THIS IS BELOW INTERNATIONAL STANDARDS AND CLEARLY INADEQUATE, IT DOES FIT WITH THE OBSERVABLE CONDITION OF MUCH OF THE POPULATION OVER THE LAST TEN YEARS.

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ADJUSTING FOR A PROJECTED POPULATION OF 46.9 MILLION IN 1988, THE FIGURE OF 7,316,700 MT OF FOOD (IN CEREAL EQUIVALENT TERMS) IS THE ESTIMATE USED FOR 1988 CONSUMPTION.

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TO SECSTATE WASHDC IMMEDIATE 0818
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

111. 1987-88 FOOD PRODUCTION

1987/88 AGRICULTURAL PRODUCTION IS HERE ESTIMATED ON THE BASIS OF EXPECTED DIVERGENCE FROM "NORMAL", OR AVERAGE, PRODUCTION FIGURES. THE "NORMAL" FIGURE IS DERIVED FROM HISTORICAL INFORMATION FOR THE BASE PERIOD WE HAVE SELECTED (SEE TABLE 2).

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ESTIMATES OF 1987/88 DIVERGENCE FROM NORMAL PRODUCTION ARE BASED PRIMARILY ON INFORMATION FROM THE CENTRAL STATISTICS OFFICE'S FOOD INFORMATION SYSTEM (CSO/FIS) PROJECT AND CORROBORATED WITH A NUMBER OF SOURCES. THESE SOURCES INCLUDE RELIEF AND REHABILITATION COMMISSION (RRC) EARLY WARNING REPORTS, NATIONAL METEOROLOGICAL SERVICES AGENCY WEATHER REPORTS, FAO CROP ASSESSMENT MISSION PRELIMINARY ESTIMATES, AND INTERVIEWS WITH KNOWLEDGABLE INDIVIDUALS IN GOVERNMENTAL AND NON-GOVERNMENTAL ORGANIZATIONS. FIELD VISITS WERE EXTREMELY LIMITED DUE TO UNEXPECTED DIFFICULTIES IN OBTAINING TRAVEL PERMISSION.

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDSO; ROME FOR FOODAG

THE ESTIMATES ARE MADE ON A REGION BY REGION BASIS, WITH SUPPLEMENTARY ESTIMATES FOR MILK PRODUCTION AND ROOT CROPS. AVERAGE VALUES HAVE BEEN APPENDED FOR THE UPCOMING BELG SEASON IN ORDER TO PROVIDE AN ESTIMATE OF

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

THE AREA DATA SHOW NO UPWARD TREND OVER A PERIOD OF 2.5 PERCENT OR MORE A POPULATION GROWTH INDEED REQUIRES THIS SERIES SUSPECT. HOWEVER, THE DIFFICULTIES INVOLVED IN MEASURING AREA WHEN 7-12 SMALL AND VICELY. SCATTERED PLOTS MAY BE INVOLVED PER FARM IS ACKNOWLEDGED. THIS DATA IS THE ONLY REASONABLE BASIS FOR CALCULATION CURRENTLY AVAILABLE.

THE UPDATED DATA SERIES IN THIS REPORT AS WELL AS THE FAO (1982) AND OTHER SOURCES SUGGEST THAT THERE HAS BEEN A DECLINE IN CONSUMPTION SINCE THE MID-1970'S. GIVEN GROWING POPULATION, STAGNATE TECHNOLOGY AND LAND CONSTRAINTS, SUCH A DECLINE WOULD BE EXPECTED. ESTIMATES OF CONSUMPTION FROM THE FOUR MAJOR FOOD SOURCES RANGE FROM THOSE USED IN EARLIER VERSIONS OF THIS REPORT (446 GRAMS/DAY) DOWN TO THOSE CALCULATED IN 1982 BY FAO (425 GRAMS/DAY).

THE SITUATION PREVAILING IN 1988 WILL UNDOUBTEDLY SUPPORT THE TREND TOWARDS DECREASED AVERAGE CONSUMPTION. THE REASONS INCLUDE: A) 1987/88 AGRICULTURAL PRODUCTION SIGNIFICANTLY BELOW AVERAGE; B) WHILE THE RELIEF SYSTEM TRIES TO REACH AS MANY AS 6 MILLION PEOPLE, THIS IS ONLY 12 PERCENT OF THE POPULATION AND MANY OF THESE PEOPLE BEYOND REACH WILL BE IN REGIONS WITH LOWER THAN NORMAL FOOD PRODUCTION; C) MUCH OF THE UNRECORDED EXPANSION OF AREA HAS BEEN ONTO LAND WITH LESS YIELD POTENTIAL, SPEEDING THE GENERAL DECLINE IN FOOD PRODUCTION/PER CAPITA WIDELY ACKNOWLEDGED TO HAVE BEEN OCCURRING OVER THE LAST TEN YEARS; D) RELOCATION AND VILLAGIZATION WILL CONTINUE TO DISRUPT THE PRODUCTIVE ACTIVITIES OF A SIGNIFICANT NUMBER OF AGRICULTURAL HOUSEHOLDS AND FINALLY E) THE RELIEF SYSTEM IN THE 1984-85 DROUGHT DISTRIBUTED ONLY ABOUT 427 GRAMS PER PERSON PER DAY AND, ASSUMING SIMILAR CIRCUMSTANCES THIS YEAR, IS UNLIKELY TO RAISE AVERAGE CONSUMPTION.

FOR THE ABOVE REASONS CONSUMPTION IS CALCULATED AT ABOUT 429 GRAMS A DAY FROM THE MAIN FOOD SOURCES, OR 156 KILOGRAMS OF GRAIN EQUIVALENT PER PERSON PER YEAR.

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YIELDS. TOTAL PRODUCTION IS ESTIMATED TO BE DOWN 20-25 PERCENT BUT THE REGION REMAINS IN SURPLUS.
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RAINFALL IN JUNE AND JULY WAS FAR BELOW NORMAL AFFECTING WHEAT AND BARLEY. WHEAT PRODUCTION MAY BE UP TO 50 PERCENT BELOW NORMAL. SINCE ABOUT ONE HALF OF TOTAL PRODUCTION IS FROM THE BELG AN ESTIMATE OF TOTAL PRODUCTION AT ABOUT 75 PERCENT OF NORMAL IS USED.

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INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

RAINFALL WAS ADEQUATE FOR MOST EARLY PLANTED CROPS AND NEARLY ALL HIGHLAND AREAS. THE LOWLAND AREAS WERE ADVERSELY AFFECTED. SINCE BELG CROPS ARE ALSO IMPORTANT OVERALL PRODUCTION MAY ONLY BE MODERATELY BELOW NORMAL.

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GOJAM

AIOAC

NORMAL AND WELL SPACED RAINFALL RESULTED IN NORMAL PLANTING OF LONG SEASON CROPS. OVERALL PRODUCTION IS EXPECTED TO BE SLIGHTLY ABOVE NORMAL AND THE REGION REMAINS A SURPLUS AREA.

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDSO; ROME FOR FODAG

GONDER

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

TWO QUITE DIFFERENT SITUATIONS EXIST IN EAST AND WEST GONDER. BOTH HIGHLAND AND LOWLAND AREAS IN THE EAST SUFFERED FROM SLIGHT TO SEVERE DAMAGE, RESPECTIVELY. THE WEST RECEIVED FAVORABLE/NORMAL RAINS AND PRODUCTION SHOULD BE ABOVE LAST YEAR AND ABOVE NORMAL. OVERALL PRODUCTION WOULD BE DOWN ABOUT 30 PERCENT FROM NORMAL.

TOTAL 1987/88 CROP YEAR PRODUCTION. IT SHOULD BE NOTED THAT BELG ESTIMATES ARE TENTATIVE AND COULD BE OVERESTIMATED SHOULD THE DROUGHT AFFECT THE SECONDARY CROPPING SEASON AS WELL.
IN SOME REGIONS THERE MAY HAVE BEEN SIGNIFICANT CHANGES THIS YEAR IN THE RELATIVE IMPORTANCE OF MANY CROPS. THESE CHANGES, WHICH MAY HAVE AN EFFECT ON TOTAL PRODUCTION, ARE NOT CAPTURED IN THIS ANALYSIS. THESE CHANGES ARE BOTH A REACTION TO WEATHER AND LONGER TERM ADJUSTMENTS DUE TO POPULATION INCREASE AND AGRICULTURE POLICY AND ADMINISTRATION. IN REACTION TO LATE START OF RAINS FARMERS MAY SUBSTITUTE SHORT SEASON CROPS. THE AREA UNDER ROOT CROPS APPEARS TO BE EXPANDING. CROPS NOT SUBJECT TO AMC QUOTAS MAY BE EXPECTED TO INCREASE (CHICK PEA, LENTILS, VETCH, HORSE BEANS, OATS ETC.) AT THE EXPENSE OF QUOTA CROPS (WHEAT, TEFF, BARLEY). MORE EFFORT SHOULD BE MADE TO QUANTIFY THESE CHANGES.

WARARGHE

RAINFALL WAS VERY POOR IN JUNE AND JULY AND MORE NORMAL

DUE TO TIME CONSTRAINTS AND THE INCONCLUSIVE NATURE OF THE OFFICIAL DATA, NO ATTEMPT IS MADE TO ADJUST THE AREA AND YIELD DATA FOR POPULATION GROWTH. THERE IS CLEARLY SOMETHING IN THE CSO SURVEY WHICH DOES NOT RESULT IN RELIABLE DATA ON AREA. WITH POPULATION GROWTH AT 2.9 PERCENT, THERE SHOULD BE SOME POSITIVE TREND IN AREA. NO SUCH TREND IS IN EVIDENCE. SOME REGIONS HAVE MORE AVAILABLE LAND TO PUT INTO PRODUCTION THAN OTHERS AND SEVERAL MAY HAVE ALMOST NONE. SINCE NO AGREEMENT CAN BE REACHED AS TO THE CONDITIONS WHICH MAY EFFECT AREA EXPANSION, IT HAS BEEN DECIDED NOT TO INCLUDE SUCH A CALCULATION. (AS NOTED IN THE ESTIMATE FOR CONSUMPTION, THE EFFECT OF EXPANSION CANNOT BE IGNORED FROM THE STANDPOINT OF SUBJECTIVE JUDGMENTS. SUCH EXPANSION CLEARLY WOULD BE LESS THAN POPULATION GROWTH RATES AND ONTO LAND OF LESS POTENTIAL ON AVERAGE. GENERALLY, THE PRODUCTION PER PERSON DAY AND PER CAPITA WOULD BE DECLINING.)

ARSI

RAINFALL IN JUNE AND JULY WAS BELOW NORMAL. WHEAT AND BARLEY ON BOTH PRIVATE AND STATE FARMS SUFFERED. BOTH MAIZE AND SORGHUM IN THE NORTH AND EAST HAD REDUCED

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WHEAT AND BARLEY AND DISEASE IN BARLEY ALSO OCCURRED;
ERITREA

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SERP-01 AFTR-05 FVA-01 OFDA-02 SEOS-02 FM-02 JAXA-01
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WHILE DATA IS VERY LIMITED TOTAL CROP LOSS IS ESTIMATED
AT 80 PERCENT.

TIGRAY

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THE SITUATION IS SIMILAR TO ERITREA WITH SLIGHTLY
BETTER CONDITIONS IN THE WEST. OVERALL PRODUCTION IS
ABOUT 30 PERCENT OF NORMAL.

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AMEMBASSYROME

STATE FARMS

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PRODUCTION ON STATE FARMS IS DOWN IN ARSI, BALE AND THE
DEBESA VALLEY.

AIDAC

OTHER FOOD SOURCES

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REOSO; ROME FOR
FOOAG

ENSEY OR FALSE BANANA SUPPLIES 7-9 PERCENT OF TOTAL
FOOD NEEDS AND IS VERY IMPORTANT IN THE SOUTHWESTERN
AREAS. PRODUCTION IS ESTIMATED TO BE NORMAL AT 550,000
MT. POTATOES ARE BECOMING AN INCREASINGLY IMPORTANT
CROP. LARGE AREAS IN HARARGHE, SIDAMO AND OTHER
SOUTHWESTERN AREAS ARE UNDER POTATOES. WHILE NONE OF
THE SURVEYS HAVE RECORDED A LARGE INCREASE IN
PRODUCTION WE FEEL AT LEAST 80,000 MT IN CEREAL
EQUIVALENT IS AVAILABLE IN 1988. MILK PRODUCTION WAS
VERY LIKELY NOT BEEN AFFECTED BY THIS DROUGHT. IN MANY
AREAS THE RAINFALL WAS NEARLY ADEQATE BUT BADLY TIMED
RESULTING IN GOOD VEGETATIVE GROWTH BUT POOR GRAIN
YIELDS. A NORMAL PRODUCTION OF ABOUT 300,000 MT OF
CEREAL EQUIVALENT IS USED FOR MILK PRODUCTION.

E.O. 12356: M/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

TOTAL PRODUCTION AT 5,764,000 MT IS DOWN ABOUT 930,000
MT FROM THE AVERAGE OF 1979/80 TO 1986/87 (SEE TABLE 3).

FROM AUGUST THROUGH OCTOBER, MAIZE PRODUCTION WAS
SERIOUSLY AFFECTED IN THE HIGHLANDS AND SORGHUM YIELDS
HAVE BEEN REDUCED. SERIOUS CONDITIONS EXIST IN
LOWLAND AREAS. OVERALL PRODUCTION IS DOWN BY 30
PERCENT.
ILLUBABOR

RAINFALL WAS NORMAL AND BETTER THAN 1986. PRODUCTION
SHOULD BE ABOUT AVERAGE.

KEFFA

PRODUCTION IN KEFA IS EXPECTED TO COME VERY CLOSE TO
LAST YEARS EXCELLENT PERFORMANCE AND REMAIN FAR ABOVE
THE HISTORICAL AVERAGE.

SHEWA

MOST OF THE CENTRAL AND WESTERN AREAS RECEIVED NORMAL
RAINFALL AND REMAIN SURPLUS PRODUCTION AREAS. THE
RIFTVALLEY LOWLANDS SUFFERED FROM SHORTAGE OF RAIN IN
JUNE/JULY. MENZ AND GICHE AREA WHILE MAINLY HIGHLAND
AREAS ALSO HAD RAIN SHORTAGE AT JULY AND SEPTEMBER. IN
THE NORTHERN SHEWA LOWLANDS CONDITIONS ARE QUITE
VARIABLE BUT GENERALLY POOR. OVERALL, WHILE SHEWA
REMAINS A SURPLUS AREA PRODUCTION IS DOWN ABOUT 5
PERCENT FROM NORMAL.

SIDAMO

IN GENERAL PRODUCTION IN SIDAMO WAS NORMAL. SOME MINOR
LOWLAND CROP DAMAGE IS EXPECTED.

WILLEGA

PRODUCTION IS EXPECTED TO BE GOOD AS RAINFALL WAS
PLENTIFUL AND WIDESPREAD.

WELLO

IN WELLO PRODUCTION IS DOWN 40-45 PERCENT OVERALL.
MAIZE WAS DAMAGED BY POOR RAINS IN JUNE/JULY. SORGHUM
DID POORLY IN THE LOWLANDS. WIDESPREAD WATER STRESS IN

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ACTION AID-00

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46.9 MILLION PEOPLE

ACTION OFFICE AFPA-03
INFO AAAF-03 AFCD-02 AFDP-06 SEOP-01 FPA-02 AFEO-02 AFPO-04
SERP-01 AFTR-05 FYA-01 OFDA-02 SEOS-02 FM-02 AAAA-01
STAB-02 SAST-01 FFP-09 FUPP-01 ES-01 ASRI-01 COM-02
OMM-02 RELC-01 TELE-01 TRS/-01 /J59 A3 211

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INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

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AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NAIRCBI FOR REDSO; ROME FOR
FOOAG

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

IV. FOOD DEFICIT: STRUCTURAL DEFICIT AND EMERGENCY
FOOD NEED

THE PRECEDING SECTIONS PROVIDE THE BASIS FOR ESTIMATING
THE 1988 FOOD DEFICIT AND FOOD NEED IN ETHIOPIA. THE
OVERALL FOOD DEFICIT IS SIMPLY TOTAL AVAILABLE FOOD
FROM DOMESTIC SOURCES (INCLUDING CARRYOVER STOCKS,
SUBTRACTED FROM CONSUMPTION REQUIREMENTS.

IT IS IMPORTANT TO DISTINGUISH BETWEEN THE PART OF A
FOOD DEFICIT WHICH IS CHRONIC AND LONG-TERM (THE
STRUCTURAL DEFICIT) AND THAT PART WHICH IS THE RESULT
OF THE CURRENT DROUGHT AND FAMINE EMERGENCY.

ETHIOPIA'S CHRONIC STRUCTURAL DEFICIT HAS RESULTED FROM
YEARS OF DISINCENTIVE PRICING AND MARKETING POLICIES,
INADEQUATE INVESTMENT IN THE SMALL FARM SECTOR, AND
POPULATION GROWTH IN EXCESS OF THE GROWTH OF CULTIVATED
AREA.

TRACING THE EVOLUTION OF THE OVERALL DEFICIT DOES NOT
HELP IN ISOLATING THE STRUCTURAL DEFICIT BECAUSE THE
UNPREDICTABLE EFFECTS OF RAINFALL PREVENT ANY CLEAR
TREND FROM EMERGING. A GOOD INDICATOR OF THE CHRONIC
STRUCTURAL DEFICIT IS THE LEVEL OF OVERALL FOOD IMPORTS
(BOTH COMMERCIAL AND FOOD AID) IN NORMAL YEARS WITH NO
DROUGHT EMERGENCY. THE LEVEL OF PAST FOOD IMPORTS, AND
ITS EVOLUTION OVER YEARS WHEN THERE WAS NO EMERGENCY,
MAY BE A VERY GOOD INDICATOR OF THE SIZE OF THE
STRUCTURAL DEFICIT.

TABLE 5 PROVIDES INFORMATION ON THE STRUCTURAL
DEFICIT. THE AVERAGE FOR THE MOST RECENT FIVE YEAR
PERIOD (EXCLUDING 1984/85) IS 449,830 MT. IF TREND
DATA ARE USED IN PLACE OF AN AVERAGE AND CONSUMPTION
WAS MAINTAINED AT ABOUT 156 KG/CAPITA STRUCTURAL
DEFICIT WOULD BE 800,000 - 1,000,000 MT IN 1987/88.

TABLE 1
CY 1988 FOOD DEFICIT

A. NORMAL CONSUMPTION (1) 7,310
- 156 KG/PERSON

-	DOMESTIC STAPLE FOOD PRODUCTION	
B.	GROSS PRODUCTION (CEREALS AND PULSES (2))	3,764
-	LESS SEED REQUIREMENTS (3)	317
D.	LESS POST-HARVEST LOSSES (4)	865
E.	NET PRODUCTION (CEREALS AND PULSES)	4,522
-	ADDITIONAL DOMESTIC FOOD PRODUCTION	
F.	ENSET (5)	550
G.	POTATOES (6)	50
H.	MILK CAPTAIN (7)	304
I.	TOTAL DOMESTIC FOOD PRODUCTION (E PLUS F PLUS G PLUS H)	5,916
J.	IMPORT REQUIREMENT (A - I)	1,800
K.	NET AVAILABLE COMMERCIAL FOOD	
-	IMPORTS (8 - H)	175
L.	ANTICIPATED COMMERCIAL FOOD	
-	IMPORTS (8)	200
M.	ANTICIPATED COMMERCIAL FOOD	
-	EXPORTS (PULSES) (9)	25
N.	TOTAL CY 1988 FOOD DEFICIT (J - K)	1,625
O.	STRUCTURAL DEFICIT (10)	449
P.	REGULAR FOOD AID PROGRAMS (11)	167
Q.	UNCOVERED STRUCTURAL DEFICIT (O - P)	282
R.	TOTAL CY 1988 EMERGENCY DEFICIT (N - O)	1,176
S.	CARRYOVER RELIEF STOCKS (DEC. 31, 1987)	
-	(12)	192
T.	CY 1987 RELIEF FOOD STILL TO ARRIVE (13)	116

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ACTION AIO 00

ADDIS, 05228, 00 OF 11, 111301Z 6400 079024

ACTION OFFICE AFEA-03
INFO AAAP-03 AFCA-02 AFOP-04 SEOP-01 FPA-02 AFEO-02 AFPO-04
SERP-01 MTR-05 FVA-01 OFDA-02 SEOS-02 FM-02 AAAA-01
STAB-03 SAST-01 FFP-09 FVPP-01 ES-01 AGRI-01 COM-02
OMB-02 RELO-01 TELE-01 TRSF-01 /059 A3 211

INFO LOG-00 COPY-01 EUR-00 AF-00 CIAE-00 EB-00 OODE-00
10-19 TRSE-00 FORE-01 AGRE-00 /021 W

0 111233Z DEC 87
FM AMEMBASSY ADDIS ABABA
TO SECSTATE WASHDC IMMEDIATE 0822
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

UNCLAS SECTION 00 OF 11 ADDIS ABABA 05228

AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDSO; ROME FOR
FOOAG

E.O. 12356: K/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

U. CY 1988 EMERGENCY DEFICIT (EXCL. CY 88
PLEDGES) (R - S - T) 860

NOTES:

- (1) FROM TABLE 2
- (2) FROM TABLE 3
- (3) SEED REQUIREMENTS ARE ESTIMATED AS 5.5 PERCENT OF
GROSS PRODUCTION
- (4) POST-HARVEST LOSSES ARE ESTIMATED AS 15 PERCENT
GROSS PRODUCTION
- (5) (6) (7) (9) USAID/ADDIS ABABA ESTIMATE
- (10) FROM TABLE 5
- (11) FROM TABLE 6 OF WHICH 114,000 MT ARE 1988 PLEDGES
- (12) FROM TABLE 7
- (13) WORLD FOOD PROGRAMME (ADDIS ABABA) ESTIMATE,
NOVEMBER 14, 1987

TABLE 2
TOTAL AND PER CAPITA CONSUMPTION, 1979/80-1986/87
(CLM00 MT)

	AVERAGE						
	1981	1982	1983	1984	1985	1986	(EXCL. 1982-1983 1984 1985 1986 1987 84/85)

DOMESTIC PRODUCTION

	1981	1982	1983	1984	1985	1986	1987
GROSS PRO. CEREALS AND PULSES (1)-	8238	7680	6237	4593	6169	6029	6587
LESS SEED REQ. (5.5 PERCENT)	318	338	318	283	339	367	335
LESS POST-HARV. LOSSES (15 PERCENT)	936	1149	936	683	925	984	988
NET PRO. CEREALS AND PULSES	4984	6173	4983	3587	4905	5268	5263
ADDITIONAL FOOD PRODUCTION							
ENSSET	594	809	512	500	500	500	559
MILK OFFTAK	282	295	304	152	207	235	285
TOTAL DOMESTIC FOOD PRO.	5864	7077	5799	4239	5612	6003	6087

COMMODITY TRADE EFFECTS

	1981	1982	1983	1984	1985	1986	1987
COMMERCIAL FOOD IMPORTS (2)	39	2	53	253	300	157	110
PLUS FOOD AID (3)	182	298	458	846	855	419	444
GROSS FOOD IMPO.	221	300	511	1099	1155	576	555
LESS FOOD EXP. (4)	35	36	28	10	14	25	28
NET FOOD IMPORTS	186	264	483	1089	1151	551	527

GOVERNMENT STOCK ADJUSTMENTS (5)

OPENING FOOD STOCKS	0	306	174	160			
LESS CLOSING FOOD STOCK		306	176	270	250		
NET CONTRIBUTION FROM STOCKS	-306	132	-96	-110			

TOTAL CONSUMP.	6050	7341	5282	5022	6815	6538	6324
POPULATION	39.67	40.82	42.80	43.22	44.10	45.59	44.2
CONSUMP. PER CAPITA (KG)	153	180	150	118	156	143	156

- (1) FOR YEARS 1979/80-1983/84: CENTRAL STATISTICS OFFICE, (TIME SERIES DATA), DEC. 1984.
- FOR 1984/85: CSO, AGRICULTURAL SAMPLE SURVEY, 1984/85, FEB. 1986.
- FOR 1985/86: USAID/ADDIS ABABA, 1986 EMERGENCY FOOD NEED ASSESSMENT FOR ETHIOPIA, FEB. 1986.
- FOR 1986/87: CSO, REPORT ON THE CURRENT CROP, WEATHER AND FOOD SITUATION, SEPT. 1987.

- (2) FOR 1979/80-1985/86: USAID, 1987 FOOD NEED ASSESSMENT FOR ETHIOPIA, MAY 1987.
- FOR 1986/87: AGRICULTURAL MARKETING CORPORATION, ANNUAL REPORT, 1986/87.

- (3) FOR 1979/80-1983/84: USAID, 1987 FOOD NEED ASSESSMENT FOR ETHIOPIA, MAY 1987.
- FOR 1984/85-1986/87: USAID/ADDIS ABABA ESTIMATE.

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ACTION OFFICE AFRA-03
INFO AAAP-03 AFCA-02 AFDP-06 SEOP-01 FPA-02 AFEO-02 AFPO-04
SERP-01 AMTR-05 FVA-01 OFDA-02 SEOS-02 FM-02 AAXA-01
STAG-02 SAST-01 FFP-09 FPPP-01 ES-01 AGRI-01 COM-02
OM-02 RELO-01 TELE-01 TRSY-01 /059 A3 211

INFO LOG-00 COPY-01 ELR-00 OC-02 AF-00 CIAE-00 EB-00
DJOE-00 10-19 IRCE-00 FORE-01 AGRE-00 /023 W
374321 111340Z /41 37

0 111233Z DEC 87
FM AMEMBASSY ADDIS ABABA
TO SECSTATE WASHDC MAREA AE 0323
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

UNCLAS SECTION 09 OF 11 ADDIS ABABA 05228

AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDSO; ROME FOR
FOOAG

E.O. 12158: R/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

(4) FOR 1979/80-1985/86: USAID, 1987 FOOD NEED
ASSESSMENT FOR ETH OPIA, MAY 1987.
FOR 1986/87: USAID/ADDIS ABABA ESTIMATE.

(5) FOR 1979/80-1985/86: USAID, 1987 FOOD NEED
ASSESSMENT FOR ETH OPIA, MAY 1987.
FOR 1986/87: USAID/ADDIS ABABA ESTIMATE.

TABLE 3
GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES,
1987/88, BY REGION
(0000 MT)

REGION	ESTIMATE 1987/88
ARS1	382
BALE	58
ERITREA	38
GAMO GOFA	55
GOJAM	435
GONDER	393
NARARGHE	283
ILLUBABOR	183
KEFA	467
SHEWA	1587
SIDAMO	229
TIGRAY	84
VELLEGA	424
VELLO	234
PEASANT MEHER	5244
STATE MEHER (1)	248
TOTAL BELG (1)	288
TOTAL	5764

NOTES:

(1) 1986/87 DATA ARE FROM CSO, REPORT ON THE CURRENT
CROP, WEATHER AND FOOD SITUATION, SEPT. 21, 1987.

(2) 1987/88 ESTIMATES ARE FROM CSO, REPORT ON THE
CURRENT CROP, WEATHER AND FOOD SITUATION (FOOD
INFORMATION SYSTEM PROJECT, CSO/FAO), SEPT. 21, 1987.

(3) USAID/ADDIS ABABA ESTIMATE.

TABLE 4
GROSS DOMESTIC PRODUCTION OF CEREALS AND PULSES,
1979/80 - 1986/87, BY REGION
(ALL SECTORS, MEWER AND BELG SEASONS)

REGION	AVERAGE									
	1979	1980	1981	1982	1983	1984	1985	1986	1987	EXCL. 1980-1981
ARS1	437	504	561	602	484	437	528	628	534	
BALE	143	145	156	198	138	123	152	198	155	
ERITREA	188	183	188	188	188	94	126	188	179	
GAMO										
- GOFA	116	123	93	148	99	67	128	77	112	
GOJAM	794	727	748	698	775	717	834	879	888	
GONDER	688	485	529	773	515	443	638	393	562	
NARARGHE										
- GRE	653	334	364	481	353	222	287	477	421	
ILLUBABOR										
- BABOR	286	185	132	218	247	124	184	155	178	
KEFA	386	312	223	352	362	238	314	478	346	
SHEWA	2835	1731	1475	1989	1633	1219	1593	1759	1745	
SIDAMO	287	192	153	212	193	164	173	383	285	
TIGRAY	229	229	229	229	229	88	153	229	218	
VELLEGA	551	432	521	585	527	428	574	446	538	
VELLO	762	1088	866	788	583	197	528	467	781	

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ACTION AID-00

ACTION OFFICE AREA-03
INFO AAAP-03 AFCD-02 AFDP-05 SEOP-01 FPA-02 AFED-02 AFDP-04
SERP-01 AFTR-05 FVA-01 OFDA-02 SEOS-02 FM-02 AAAA-01
STAG-02 SAST-01 FFP-09 FVPP-01 EG-01 AGRI-01 COM-02
OMM-02 RELO-01 TELE-01 TRSY-01 /J53 A3 211

INFO LOG-00 COPY-01 EUR-00 AF-00 CIAE-00 EB-00 DOCE-00
10-19 TRSE-00 FORE-01 AGRE-00 /021 W

O 111333Z DEC 87
FM AMEMBASSY ADDIS ABABA
TO SECSTATE WASHDC IMMEDIATE 0824
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

UNCLAS SECTION 18 OF 11 ADDIS ABABA 05228

AIDAC

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REOSO; ROME FOR FODAG

E.O. 12358: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

TOTAL 7486 6509 6238 7660 6237 4553 6169 6629 5693

SOURCE OF DATA:

1979/80 - 1983/84 ARE FROM CSO, TIME SERIES DATA
1979/80 - 1983/84. ERRORS AND 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 ETHIOPIA AND T. GRAI
ARE PROVIDED BY USAID/ADDIS ABABA.

1985/86 DATA ARE FROM USAID/ADDIS ABABA, 1985 EMERGENCY
FOOD NEED ASSESSMENT FOR ETHIOPIA, FEBRUARY 1986,
ADJUSTED FOR EXCEPTIONAL BELG CROP HARVESTED IN M D
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.

1986/87 DATA ARE FROM CSO, REPORT ON THE CURRENT CROP,
WEATHER AND FOOD SITUATION, SEPTEMBER 21, 1987.

TABLE 3
AVERAGE STRUCTURAL DEFICIT
(1000 MT)

	AVERAGE						
	81/82-		88/87				
	1981	1982	1983	1984	1985	1986	(EXCL. 1987 84/85)
	1982	1983	1984	1985	1986	1987	84/85)

CONSUMPTION
REQUIREMENT (1) 6189 6368 6552 6742 6911 7111 6626

POPULATION 39.67 40.82 42.00 43.22 44.38 45.58 42

GROSS PRODUCTION
CEREALS AND
PULSES 9238 7660 6237 4553 6169 6623 6507
LESS SEED

	ADDIS	05228	18-06	11	111305Z	6519	079841	A1
REQUIREMENTS	314	338	310	283	339	367	335	
LESS POST-								
HARVEST LOSSES	936	1149	935	683	325	994	948	
NET PRODUCTION	4988	6173	4983	3587	4985	5268	5263	
PLUS EASET	594	689	512	500	500	500	559	
PLUS MILK								
CONSUMPTION	282	295	304	152	287	135	265	
TOTAL DOMESTIC								
PRODUCTION	5864	7877	5799	4239	5612	5883	6887	

STOCK ADJUSTMENTS -306 132 -96 -7-

IMPORT REQU. (2) 324 (789) 753 2809 1167 1124 539

NET COMMERCIAL

FOOD IMPORTS (3) 4 (34) 25 243 286 132 83

FOOD DEFICIT

(SURPLUS) 320 (675) 728 2566 881 992 449

(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 SHORTER BASE
PERIOD (1984/85 - 1986/87) IN ORDER TO REFLECT THE
RECENT TREND TOWARDS HIGHER LEVELS OF COMMERCIAL FOOD

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ACTION A10-00

ACTION OFFICE AFRA-03

INFO AAAF-03 AFCD-02 AFOP-06 SEOP-01 FPA-02 AFEO-02 AFPO-04
SERP-01 AFTR-05 FVA-01 OFDA-02 SEOS-02 FM-02 AAXA-01
STAG-02 SAST-01 FFP-09 FVPP-01 EG-01 AGRI-01 COP-02
OMW-02 RELO-01 TELE-01 TRS7-01 /J59 A3 211

INFO LOG-00 COPY-01 ELR-03 AF-J0 CIAE-00 EB-00 CODE-00
10-19 TRSE-00 FORE-01 AGRE-00 1021 V

374333 111304Z /47 38

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FM AMEMBASSY ADDIS ABABA
TO SECSTATE WASHDC IMMEDIATE 0825
INFO AMEMBASSY NAIROBI
AMEMBASSY ROME

UNCLAS SECTION 11 OF 11 ADDIS ABABA 05228

AIDAG

FOR AFR/EA, FFP/AFR, OFDA; NAIROBI FOR REDCO; ROME FOR
FOOAG

E.O. 12356: N/A
SUBJECT: CY 1988 FOOD NEEDS ASSESSMENT

IMPORTS.

TABLE 6 CY 1987 FOOD AID (X1000 MT)			
	EMERGENCY	REGULAR	TOTAL

RELIEF STOCKS

AS OF JAN.

1, 1987 174000 0 174000

CY 1987

ARRIVALS 377591 98713 476304

RECORDED

(JAN.-OCT.) 139715 52479

EXPECTED

(NOV.-DEC.) 237876 46234

OF WHICH

ARE CY 1988

COMMITMENTS) (114000) (39534)

CY 1987 DIST.

360000 59179 419179

RECORDED

(JAN.-SEPT.) 220000 52479

EXPECTED

(OCT.-DEC.) 140000 6700

ESTIMATED YEAR

END BALANCE

12/31/87 191591 39534 231125

SOURCE: UN WORLD FOOD PROGRAM (ADDIS ABABA) ESTIMATES,
NOVEMBER 24, 1987.

TABLE 7 CY 1988 FOOD AID (X1000 MT)			
	REGULAR	EMERGENCY	TOTAL

ESTIMATED OPENING

STOCKS (JAN. 1, 1987) 39534 191591 231125

CONFIRMED CY 1988			
PLEDGES	167175	167175	421042
ARRIVING IN CY 1987	39534	114000	153614
ARRIVING IN CY 1988	127641	149787	277428

CONFIRMED CY 1988			
FOOD LEVELS	167175	341378	508553
(INCLUDES CARRY-OVER STOCKS)			

UNCONFIRMED CY 1988			
PLEDGES	64340	55100	119440
ARRIVING IN CY 1987	0	0	0
ARRIVING IN CY 1988	64340	55100	119440

POTENTIAL CY 1988			
FOOD AID LEVELS	231515	396478	627993
(INCLUDES CARRY-OVER STOCKS)			

SOURCE: UN WORLD FOOD PROGRAM (ADDIS ABABA)
ESTIMATES, NOVEMBER 24, 1987. JANOWSKI

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