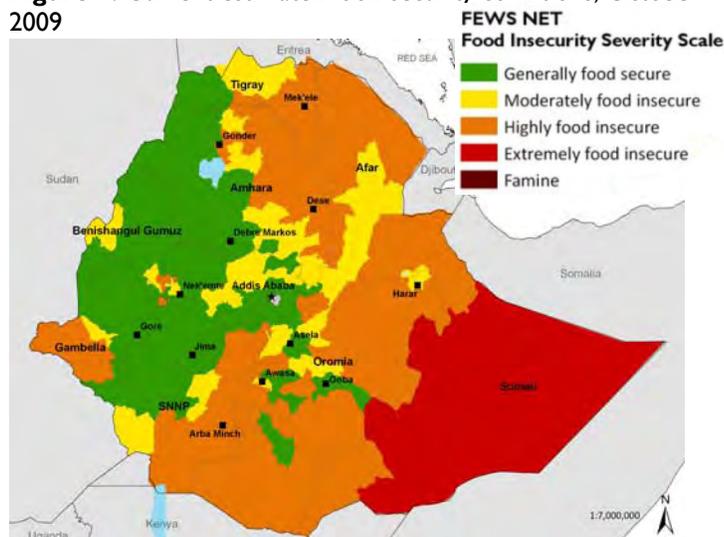


ETHIOPIA Food Security Outlook

October 2009 to March 2010

- Following successive seasons of below-average rains, including poor *belg/gu* rains in 2009, the Government and humanitarian partners released a humanitarian requirement document on October 22nd. According to this document, 6.2 million people will require emergency food assistance between October and December 2009 with a total net food requirement of 159,410 MT, equivalent to USD 121 million.
- Performance of the *kiremt* rains (June to September) has been below normal, particularly in Gambella, the eastern half of the country and southern lowlands of SNNPR. As a result, prospects for the main season *meher* crop harvests are poor in these areas.
- Poor main season *karma/karan* rainfall in the pastoral region of Afar and northern zones of Somali region have led to poorer than usual pasture and water availability for this time of the year. Food security over the next six months, normally a dry period, is expected to deteriorate further as the dry season progresses.
- Food security in the southern zones of Somali region, neighboring lowlands of Oromia and South Omo Zone of SNNP Region is expected to improve marginally following the onset of the *deyr* (October-December) rains. However, the respite will likely be short-lived and households will continue to depend heavily on external assistance.

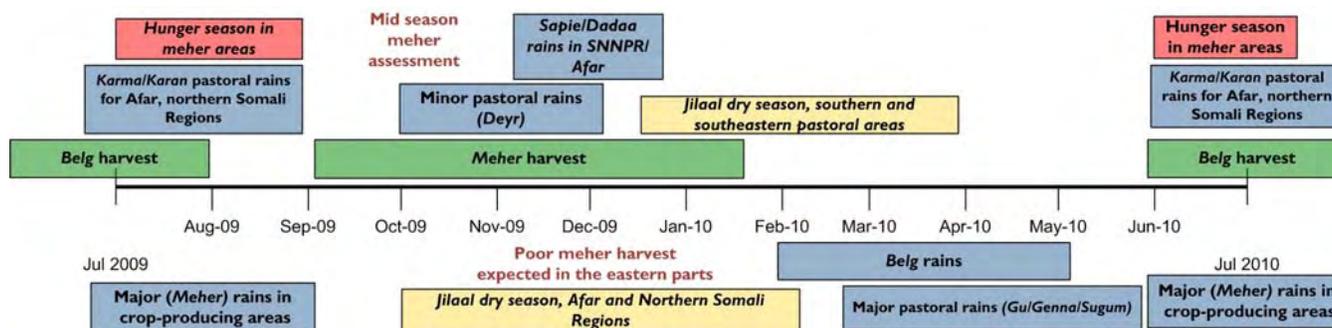
Figure 1. Current estimated food security conditions, October 2009



For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: FEWS NET and WFP

Seasonal calendar and critical events



Source: FEWS NET

Current food security conditions

Following successive seasons of below-average rains, including poor *belg/gu* rains in 2009, the Government and humanitarian partners released a humanitarian requirement document on October 22nd. According to this document, 6.2 million people will require emergency food assistance between October and December 2009 with a total net food requirement of 159,410 MT, equivalent to USD 121 million.

Performance of the *kiremt* rains (June to September), the main rainy season for most of the country, has also been below average this year in the eastern and southern parts of the country. The rains began late, were poorly distributed, and withdrew early from the northern and eastern parts of the country. A government-led multi-agency mid-season *meher* assessment was conducted between September 28th and the October 11th given concerns that *meher* production, which normally account for 90 to 95 percent of total annual production, would be poor this year. Results from this assessment are expected to be released by mid-November.

The *meher* crop harvest, which usually runs from October to January, is normally a food secure period in most crop producing parts of the country. However, following the late onset, erratic performance, and early withdrawal of the *kiremt* (June to September) rains this year in most eastern *meher* crop producing parts of the country, crop conditions are poor and harvests are delayed. In many areas, high yielding long cycle crops have been replaced by lower yielding short cycle crops because of poor performance of the *belg* (February to May) rains that are normally used for planting these varieties. Long cycle maize, sorghum, and millet crops that were planted, and that would typically be harvested in October, are not yet mature while short cycle crops are at an early stage in both the lowlands and the highlands. As a result, this year's hunger season, which typically runs through September, has been extended. Affected areas include: the Eastern, Southeastern and Southern Zones of Tigray region, Wag Hamra, North Wello, South Wello, North Shewa, and Oromia zones of Amhara region, East Hararghe, West Hararghe, East Shewa, Arsi, West Shewa and Rift Valley areas of West Arsi zones of Oromia region.

In the lowlands of Arsi, areas in the Rift Valley in West Arsi, and in the lowlands of East and West Hararghe in Oromia Region the *kiremt* rains were especially poor and *meher* crop production is expected to be far below normal. Field reports suggest a complete failure of both long and short cycle crops in East Hararghe and in the lowlands of West Hararghe. In addition, production of coffee and chat, the main cash crops in East and West Hararghe zones is reported to be poor with only half of normal production expected this year. Meanwhile demand for agriculture labor and livestock prices have both declined. In the worst affected areas of East and West Hararghe, distress sales of livestock and unusual migration of people to urban areas in search of wage labor has increased. People in some woredas of these two zones have also started consuming wild foods.

According to initial reports from the mid *meher* seasonal assessment, *kiremt* rains were late by up to two months in most parts of Southern Nations Nationalities and Peoples' Region (SNNPR). Performance of the rains was also erratic once they began, especially in the lowlands and dry midland parts of the region. The delayed onset and erratic performance resulted in delayed planting, especially in the lowland woredas of Wolayita, Gamo Gofa, Gideo and Sidama zones and Amaro, Burji, Konso and Derashe Special woredas. Crops that would normally be at flowering and seed setting stage in early October, were at vegetative stage. In these areas, the rains need to continue beyond their normal cessation time for these crops to mature. However, even if the rains do last longer than normal, substantial yield reductions are expected due to the poor performance of the rains during the main part of the season. The performance of *meher* crops is expected to be relatively better in the highland and wet midlands due to better moisture in these areas. In addition to the *meher* crops, these areas also produce *belg* crops. Performance of *belg* crops this year was also poor due to poor performance of *belg* rains. Sweet potato planting that is normally carried out in October and November is reported to be low this year due to a shortage of sweet potato cuttings following poor production of the previous *meher* and *belg* season rains.

In the southern parts of SNNPR, that are more dependent on the *belg* rains than the *kiremt* rains, including the southern special woredas of Konso, Derashi, Burji and Amaro and the dominantly pastoral zone of South Omo, performance of the *belg* rains was poor and performance of the current October to December short rains has been below average to date. Food security in these parts of the region is already fragile with reports of migration with livestock, reliance on social networks, increased livestock sales, reduction of number and size of meals, shifting expenditure from non-food to staple food and request of officials for relief assistance especially in the lowlands.

Prospects for coffee production this year are reported to be good despite the poor *kiremt* rains in the coffee growing livelihood zones of Gideo, Sidama, Wolayita, Hadiya and Kembata Tembaro Zones. Performance of pepper, an important cash crop, however is poor in the pepper producing livelihood zones of Alaba Special woreda, Meskan and Mareko woredas of Guraghe zone and Lanfro and Dalocha woredas of Siltie zone.

Although overall food security in these parts of SNNPR is not as good as it would be expected for this time of the year, there has been an improvement from past months when high levels of malnutrition prevailed and admissions to OTP centers were high. These improvements follow ongoing relief operations, PSNP food distributions, and some delayed *belg* harvests. Cereal prices continue to be stable contributing to food security in crop producing areas. Livestock prices, on the other hand, are declining because of poor animal body conditions.

Performance of the *kiremt* rains in Gambella region has been very poor this year with long dry periods during the season. The mid-season *meher* assessment teams report that the region's major staple crop, maize, has failed in all woredas except in Godare and Mengesh woredas and that prospects for sorghum, which is currently at vegetative stage, are poor. Assessment teams also report that following the poor performance of the main season crops, food security is deteriorating. In addition to the failure of the crops, internal clan conflicts and cross border cattle raiding with neighboring Sudan contribute to the food insecurity. A substantial increase in the number of people who require emergency food aid is expected.

Food security in the dominantly pastoral region of Afar and the two northern zones of Somali region, Jijiga, and Shinile, continues to be below normal for this time of the year, a period when pasture and water availability are usually at their peak. Many woredas in Afar region are already facing critical water and pasture stress. The physical condition of livestock continues to be poor and as a result, prices of livestock are still low relative to cereal prices in Elidar and Kore woredas in Zone 1 and Erebtu and Bidu woredas in Zone 2. Following poor rains in 2008 and 2009, livestock conception and birth rates are very low as compared to normal years. This will impact household livestock holdings, increasing household vulnerability to future shocks, while at the same time reducing milk availability and wealth status. Some unseasonable rains were received in most parts of Afar Region and the northern zones of Somali Region in October. These helped to regenerate pasture and replenish of water sources. The next seasonal rains in these areas are not expected until March 2010. There is a need to closely monitor these areas as food security is already fragile following repeated failure of seasonal rains.

The southern zones of Somali Region and the lowlands of Bale and Borena in Oromia are currently receiving the *Deyr/Hagaya* rains after successive series of below normal seasons including the 2009 *Gu/Gana* (April to June rains). Currently, significant portions of these regions face severe water and pasture shortages although most districts are reported to have received at least a few days of rain. The available pasture and water resources are not sufficient to sustain the needs of the pastoral communities while pasture regenerates and water sources are replenished by the *Deyr/Hagaya* rains. The influx of pastoral communities from neighboring districts of northern and northeastern Kenya and southern and central Somalia during the dry season before the *deyr* rains began has contributed to the fast depletion of available pasture and water. However, since *Deyr/Hagaya* rains are expected to be normal to above normal, pastoral groups from these countries are expected to return home, helping to conserve resources in Ethiopia.

Resource-based conflicts in areas bordering Borena and Bale zones of Oromia and Salahad and Filtu woredas of Somali Region still threatens trade and livestock movement. Livestock deaths due to diseases are reported in parts of Dhas, Moyale, Dilo and Dire woredas of Borena zone.

Most-likely food security scenario (October to December 2009)

Normally the period October to March is a time when food security is relatively good in most parts of the country as food stocks are usually high and prices low following the October-January *meher* harvest. This year, however, *meher* crop production is expected to be poor, especially in the eastern *meher* crop producing parts of the country and lowlands of SNNPR, leading to a very early start of the hunger period particularly in the areas where the crop production is expected to be extremely poor, such as in the lowlands of East and West Hararghe zone of Oromia region, lowlands of East and Southern Zones of Tigray Region and lowlands of North and South Wello zones in Amhara region. In these areas, stress coping mechanisms like reduction of meals, early migration in search of wage labor, increased sales of charcoal and

firewood and selling of productive assets could begin as early as January of next year unless sufficient assistance is provided.

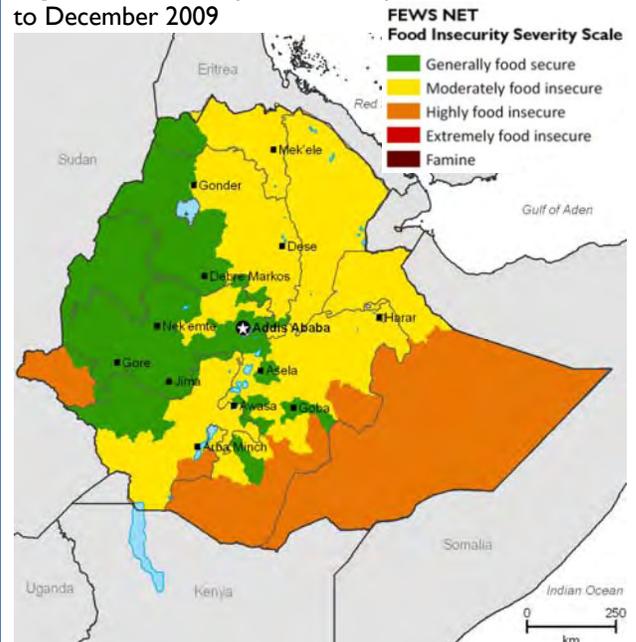
The most likely scenario is based on the following assumptions:

- Poor *meher* crop production is expected in the eastern *meher* crop-producing parts Tigray, Amhara and Oromia Regions as well as the lowlands of SNNPR following poor performance of the *kiremt* rains.
- Rains that were received in the north and northeastern parts of the country after the early cessation of the *kiremt* rains were beneficial for regeneration of pasture and replenishment of water but may have damaged crops that are ready for harvest, especially in the lowlands.
- Performance of the remainder of the *deyr* season is expected to be normal to above normal based on the National Meteorology Agency forecast.
- Normal flooding is expected to occur along the Wabe Shebele and Genale rivers. This is expected to be beneficial for recession farming.
- Food prices are expected to be seasonably stable despite a poor harvest in the eastern parts of the country.
- PSNP and cash distributions are expected to be undertaken normally during the January to March period.
- Emergency food aid requirements are expected to be estimated based on the mid season *meher* assessment findings in November. This is expected to lead to timely response for emergency needs from January to March

Following the poor performance of the *belg* (February to May) and late start, erratic performance and early cessation of the *kiremt* (June to September) rains, especially in the eastern parts of the country, performance of *meher* crops is expected to be much below average, though food security in these areas is expected to improve when harvest begins in November. However, stocks are not expected to last long, especially in the lowlands of East and West Hararghe, lowlands of Arsi, West Arsi and West Shewa zones of Oromia Region, most of Wag Hamra, the eastern parts of North and South Wello Oromia and North Shewa zones of Amhara Region, where production is expected to be very poor. Food security is expected to begin deteriorating and reduction of meals, increased levels of distress migration in search of food and labor, increased sales of charcoal and firewood and selling of productive assets will begin as early as January of next year unless sufficient assistance, especially food aid, is provided.

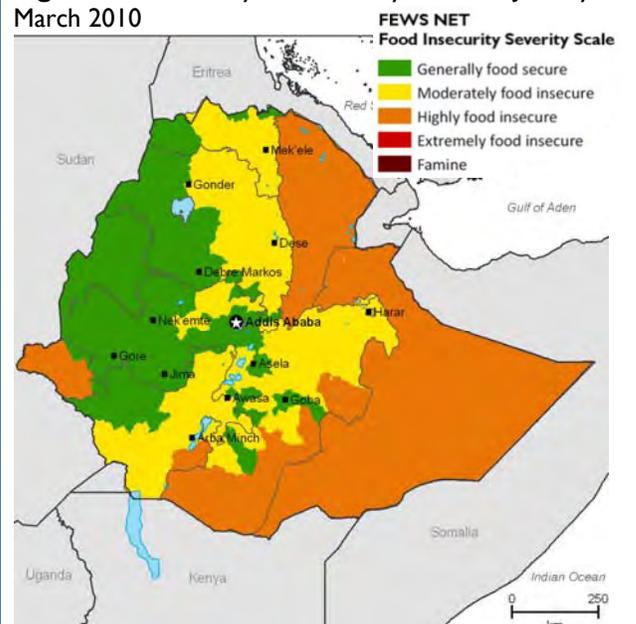
The poor performance of the *kiremt* rains also means that availability of agriculture labor opportunities during harvesting will be limited, further aggravating food insecurity. Given that these areas have only one cropping season, food security will remain poor and households will be heavily dependent on external assistance until their next harvest begins in October 2010.

Figure 2. Most-likely food security scenario, November to December 2009



Source: FEWS NET Ethiopia and WFP

Figure 3. Most-likely food security scenario, January to March 2010



Source: FEWS NET Ethiopia and WFP

In the highland and wet midland parts of SNNPR, food security is expected to be normal during the November to March period given a relatively better *meher* harvest. In the lowlands and dry midlands however, in addition to the poor *meher* crops harvest, the shortage of sweet potato cuttings will mean that there will be shortage of the transitional crop, sweet potato, during the February-May hunger period. These areas are already highly vulnerable to food insecurity and also very densely populated. Food security will quickly deteriorate with high rates of acute malnutrition in the lowlands of Gamo Gofa, Wolayita, Gedio, Silti, Dawro, Sidama and Guraghe zones unless adequate and timely assistance is provided. Similarly, unless performance of the small rains in the southern parts of SNNPR improves during the remainder of the season, these areas will continue to be highly food insecure until their main season rain begins in April.

The southern special woredas of Konso, Derashe, Amaro and Burji are also expected to continue to be highly food insecure since they are dependent on the *belg* season production and performance of the last *belg* was very poor. Though these areas normally receive large amounts of assistance through the PSNP due to their high level of chronic food insecurity these areas will require additional emergency food assistance this year, at least until the next *belg* harvest, expected in June/July 2010. Parts of the population of Gambella region practice recessionary farming along major river banks using moistures from receding floods of overflowing rivers. Planting is undertaken in October and harvest begins in January. This year however, flood recession harvest prospects are poor as the overflow and flooding of the rivers has so far been inadequate. Thus, the food security situation in the region, except Mengesh and Godere woredas that got reasonable rainfall during the season, will continue to be poor in the coming nine months.

In the northeastern pastoral areas of Afar region and the two northern zones of Somali region, food security is expected to deteriorate further until the next rains begin in March. This long dry period will be particularly difficult as these areas have faced consecutive poor seasonal rains, leading to significantly smaller herds compared to the baseline year and making them more vulnerable to food insecurity in the future. Further loss of livestock is expected during the long dry period between October and February. Shortages of drinking water will be widespread. Food security will continue to depend heavily on external assistance.

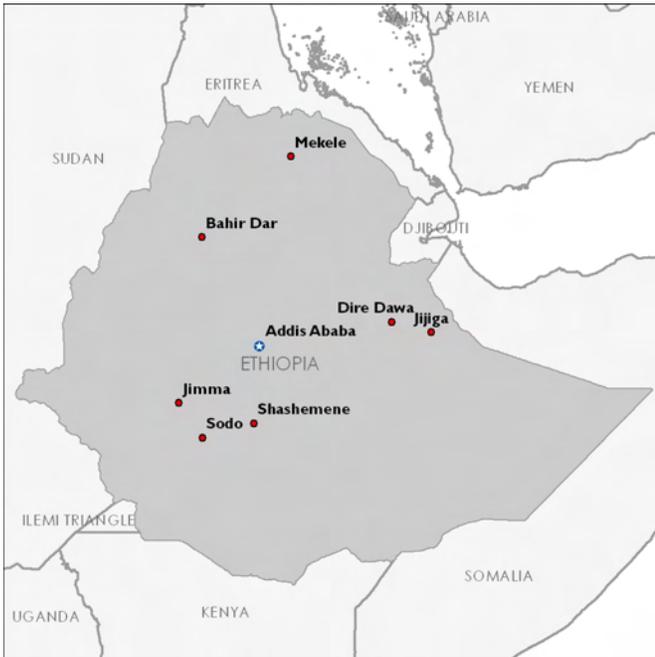
Food security in the southern seven zones of Somali region (Fik, Degehabur, Gode, Warder, Korahe, Afder and Liben) and neighboring lowlands of Oromia Region (Bale and Borena lowlands) is expected to improve slightly with the progress of the *deyr* rains. Ongoing food aid distributions have also contributed significantly to the improvement in food security. However, although the rains are expected to improve water and pasture availability and increase livestock conception rates, access to food will still be constrained by the underlying market security related access problems, high livestock mortality during the past drought period, unfavorable livestock:cereal terms of trade, low animal birth rates and conflict. Insufficient humanitarian assistance in Afder and Liban Zones of Somali Region will also lead to distress livestock sales even before their body condition improves.

Gradual increases in livestock prices has been observed in southern pastoral areas with the start of the rains, especially for camels and shoats, although livestock demand is still low due to poor body conditions in most parts of *Deyr/Hagaya* receiving areas. Locally produced grains and food prices are relatively low as compared to the 2007 and 2008 average, which make food availability relatively better this year as food aid distribution has substantially improved. However, food insecurity will continue to be a concern until livestock body condition and access to markets, and thus livestock:cereal terms of trade, improves substantially. Availability of milk, a very important source of food for children, is not expected to improve with the current rains as conceptions have been very poor in previous seasons due to the poor rains. Consequently, food security in these parts of the country will continue to rely heavily on external assistance. Planting of farmlands in agro-pastoral and riverine areas of Somali region, Borena, Guji and Bale zones of Oromia, have begun as the rains progress. Performance of these crops will heavily depend on the performance of the rains up to the end of the rainy season.

Table I: Events which could affect the food security outlook

Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
A. Eastern and central parts of SNNPR	<ul style="list-style-type: none"> Extended (cessation extended beyond normal time) <i>kiremt</i> rains Poor performance of <i>sapie</i> rains and unavailability of sweet potato cuttings 	<ul style="list-style-type: none"> Although below average, <i>meher</i> harvest will increase availability of food for areas that produce both <i>belg</i> and <i>meher</i> crops Food security will deteriorate rapidly and with rapid increases in the levels of acute malnutrition among the vulnerable 	Unlikely	Cessations time of <i>Kiremt</i> rains Food aid distributions
B. The eastern <i>meher</i> crop producing parts of the country including the northeastern highlands of Amhara and Tigray, areas in the rift valley and East and West Hararghe zones of Oromia region	<ul style="list-style-type: none"> Extended (cessation extended beyond normal time) <i>kiremt</i> rains leading improving pasture and water availability for the livestock Improved availability of food aid (general ration and supplementary food) 	<ul style="list-style-type: none"> Improved livestock physical condition leading to improvement in ToT Improvement in the availability and access to food at the household level 	Unlikely	<i>Kiremt</i> rains Food aid distributions
C. Pastoral region of Afar and the two northern zones of Somali region	<ul style="list-style-type: none"> Continuation of the unseasonable rains substantially improving availability of water and pasture Decline in staple food prices 	<ul style="list-style-type: none"> Improved livestock:cereal ToT, improved conception Access to food improved 	Unlikely	Unseasonable rains Prices of staples
D. Southern seven zones of Somali region and neighboring lowlands of Oromia	<ul style="list-style-type: none"> Poor <i>deyr</i> rains 	<ul style="list-style-type: none"> Further deterioration in water and pasture availability 	Unlikely	<i>Deyr</i> rains
E. Gambella	<ul style="list-style-type: none"> Continuation of the <i>kiremt</i> rains beyond the normal cessation time. Rains will not be sufficient to bring over flooding of the rivers leading to insufficient moisture for recessional farming. 	<ul style="list-style-type: none"> <i>Meher</i> sorghum reaches maturity and food availability improves Food security among the people that normally depend on the recessional farming will continue to be poor. 	Unlikely	<i>Kiremt</i> rains

* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly



Maize is the most widely consumed cereal by the rural poor. Sorghum is generally one of the cheapest cereals. Teff is also very important throughout the country. The most important markets for teff are the large cities including Addis Ababa, Bahir Dar, Mekele, and Dire Dawa. Addis Ababa is the capital city and Dire Dawa, Mekele, and Jijiga are major towns in the eastern, mainly food insecure, parts of the country. Bahir Dar is a major town in a surplus producing area. Jimma represents a generally food secure surplus area. Shashemene is an assembly, wholesale, and retail market and the main transshipment point for cereals from the south and southwest to the center and east. Sodo is an urban center located in the Wolayita zone, and is one of the most chronically food insecure parts of the region.

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

