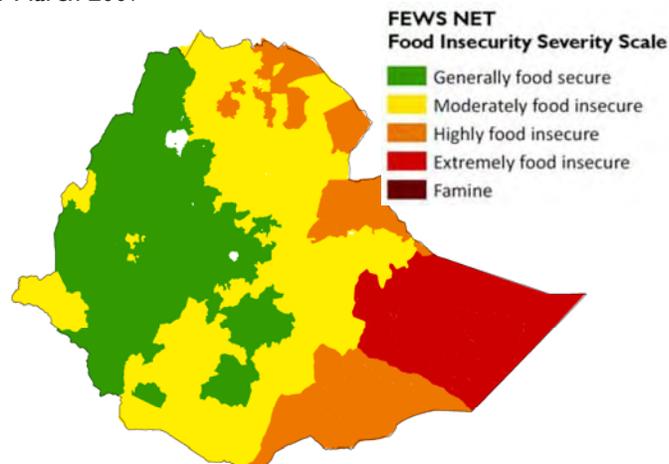


ETHIOPIA Food Security Outlook

January to June 2009

- According to results of the Government led multi-agency needs assessment conducted in November/December, 4.9 million people will require emergency assistance in 2009, beyond those covered by the PSNP. An additional 1.2 million children under five and pregnant and lactating women will require targeted supplementary feeding.
- The western part of the country is generally food secure. Performance of the *meher* season in the eastern areas however, was below average. Food security is poor in the northeastern pastoral region of Afar following failure of both the *sugum* and *karma* rainy seasons. Southern and southeastern parts of the country continue to be highly and extremely food insecure despite good *deyr* (October to December) rains.
- In the most likely scenario from April to June, food security is expected to deteriorate in eastern crop dependent parts of the country as below-average food stocks from the *meher* season are depleted. Anticipated *sugum* rains in Afar region will improve water availability, but food security will deteriorate due to the impacts of two consecutive poor rainy seasons. The food security of the pastoral and agro pastoral populations in the south and southeast is not expected to improve although their main rainy season (*gu*), will begin in March/April. In SNNPR, poor sweet potato and coffee production will lead to food shortages during the transitional period before the *belg* harvest begins in July
- In the worst-case scenario, the *belg/gu/genna/sugum* rains will be much below -normal, leading to loss of income from *belg* season agricultural activities during the February to June period. Water and pasture availability will decline significantly following the poor performance of the season. Under this scenario, it is assumed that food assistance through both the Productive Safety Net Program (PSNP) and the emergency program will be inadequate, and eastern and southern parts of the country will be highly and extremely food insecure.

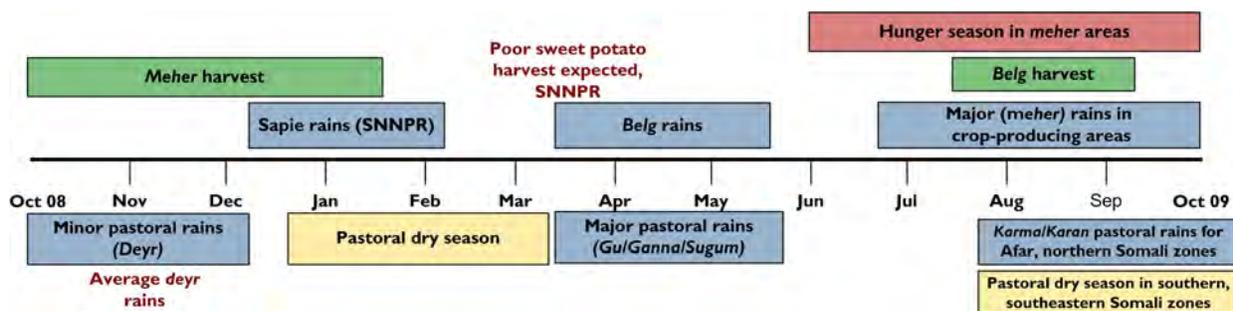
Figure 1. Current estimated food security conditions, January to March 2009



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 Conditions

Food security for the current period, January to March 2009, is generally normal in the western, crop-dependent parts of the country following the good performance of the main *meher* 2008/09 season production (October to January). However, *meher* season production in the eastern *meher* crop producing parts of the country (including eastern Tigray, eastern Amhara, eastern Oromia, East and West Hararghe, Harari, Dire Dawa, and northern Somali region) is below-normal due to the poor performance of both the 2008 *belg* rains (March to May), which are typically used to plant higher yielding long-cycle *meher* crops, and the *kiremt* rains (June to September). Most of these areas are already chronically food insecure due to high population density, heavy reliance on rain-fed agriculture, small landholdings, soil erosion, and limited off-farm income opportunities. Roughly 13 percent the population in these areas relies on the Productive Safety Net Program (PSNP) which is the Government's multi-year assistance program for chronically food insecure populations.

Belg crop producing parts of the country experienced a failed *belg* season in July 2008. Households in some woredas of North and South Wollo zones of Amhara region, that depend on the *belg* harvest for more than 75 percent of their total annual crop production, were especially affected. Although these areas have some *meher* production, they will continue to face significant food deficits until the next *belg* harvest in July 2009.

In SNNPR, poor performance of the 2008 *belg* season, the period when coffee trees flower, has resulted in the failure of coffee production in some areas. In these areas, production was about 30 percent of last year's yields and about 50 percent of yields in the baseline reference year (2003/04) in the Gedeo Coffee and Sidama Coffee livelihood zones. In addition to the loss of income for coffee farmers in these livelihood zones, the poor harvest has also reduced the availability of coffee related employment for those that rely on wage labor. The international price of coffee has also declined this year, affecting both producer prices and wages for coffee processing. In these densely populated and chronically food insecure parts of the country, food security is already poor and is expected to deteriorate further.

The 2008 *sugum* (March to May) and *karma* (July to September) rains were poor in Afar Region. This led to poor water availability, and water trucking is ongoing in Elidaar, Korrie, Bidu, and Erebtu woredas. There was also unusually high livestock mortality, poor livestock/cereal terms of trade, and poor livestock productivity (i.e. milk production) in these areas. According to the November/December needs assessment findings, pasture and browse availability was poor and is inadequate for the *Jilaal* (dry season between October and March) in most visited areas. Potential grazing areas (e.g., Dokka, in zone four; Bahirin in zone two; Alidegi in zone three and rangelands around Awash River in Gewane and Bureymedaitu districts) were badly overgrazed. A large livestock population has migrated early to the dry season grazing areas in zone 5 and Alta (along Awash River). Conflict between the Afar and the Issa has limited grazing areas and increased the size of the buffer zone needed between the two conflicting groups.

In Somali region and in the lowlands of Oromia, performance of the *deyr/hageyaa* rains were normal to above normal, except in parts of Bokh and Danot woredas of Warder zone, East Imy woreda of Gode zone, Erer, Ayisha and Shinile woredas of Shinile zone, Doloado of Liban zone, West Imy woreda of Afder zone, Sagag and Duhun woreda of Fik zone and Harshin woreda of Jijiga zone. Following the good performance of the recent rains, pasture and water has improved in most parts of the region. However, these parts of the country, including the southern zones of Somali region and neighboring lowlands of Oromia, remain highly and extremely food insecure due to repeated shocks, including below-average rains in 2005/06, flooding in 2006, 2007, and 2008 in riverine areas, conflict, below-average performance of both the short rainy season (October to November) and the main rainy season (March to May) of 2007, as well as the 2008 *gu* season (March to May). These consecutive seasons of poor rains caused unusually high livestock mortality and poor conception prior to the start of the *deyr* 2008 rains. Therefore, although the recent *deyr* rains improved water and pasture availability, it will take a number of average seasons (at least 3) for pastoral livelihoods to recover. In addition to the overall rise in food and non-food prices in the country, Fik, Gode, Degehabur, Warder, and Korahe zones of Somali Region continue to face conflict-related market access problems. These issues began in June 2007 and further contributed to very poor livestock/cereal terms of trade for pastoralists and agro pastoralists in these zones.

Throughout the country, prices of cereals have been exceptionally high throughout 2008 in all parts of the country. On average they are about 100 percent higher than prices in 2007 and about 200 percent higher than that of the recent five year average.

According to results of the Government led multi-agency needs assessment conducted in November/December 4.9 million people will require emergency assistance in 2009, beyond those covered by the PSNP. These emergency beneficiaries are located primarily in Somali, Amhara, and SNNP regions. An additional 1.2 million children under five and pregnant and lactating women will require targeted supplementary feeding. Estimated assistance needs for the first 6 months of 2009 total \$454 million.

Most-likely food security scenario (April-June 2009)

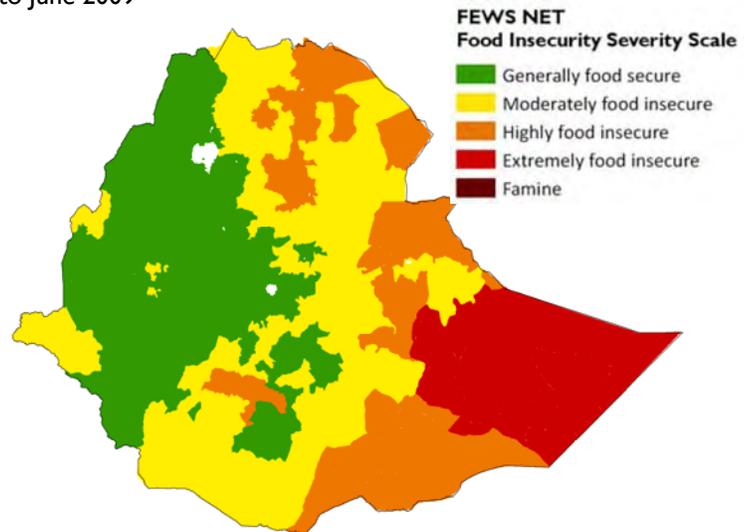
In eastern *meher* crop producing areas, food security is expected to deteriorate further as stocks from the poor *meher* season harvest are depleted more quickly than usual. This will affect not only household access to food and income from their own production, but will also result in reduced agricultural labor opportunities, an important source of income for poor households who rely primarily on food purchases. This situation will then continue until the next harvest begins in October/November 2009. While the prices of staple foods have declined slightly over the past few months, they remain well above the five-year average (in some cases 200 percent of average) and the livelihood baseline reference year. This will further impede household food access, particularly for those that rely on purchases to meet their food needs.

Under this scenario, it is assumed that the 2009 *belg* rains will be normal and that therefore, agricultural labor opportunities during the *belg* rainy season will be normal, improving household income and food security in these areas. However, as the impacts of the 2008 *belg* failure are still being felt, the provision of appropriate and timely food assistance is still required. In addition, there is a need to provide agricultural support (e.g., seeds and fertilizer) in order for *belg* dependant areas of the country to benefit from the normal 2009 seasonal rains assumed under this scenario.

In the most likely scenario in SNNPR, food security in coffee producing livelihood zones of SNNPR will deteriorate further, most seriously during the April to June hunger period, just before the green maize *belg* harvest in July when food prices are typically at their highest. Parts of SNNPR, (Wolayita, Gamo Gofa, Dawro, Yem, parts of Sidama, and KT zone), which rely heavily on the consumption of sweet potato as a transitional crop during the hunger period, are also expected to face food shortages during the transitional period between February and June following a 50 percent reduction in sweet potato planting. This reduction occurred due to a shortage of cuttings following last years' failed sweet potato harvest.

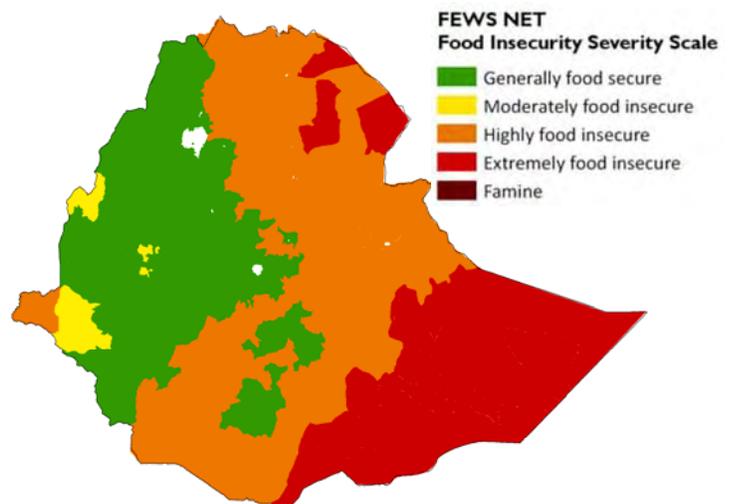
Meanwhile, in Afar, food security is expected to deteriorate, even if the *sugum* rains begin in April, given the poor performance of both the *sugum* and *karma* rains of 2008. Areas that are currently facing critical water and pasture problems and where water trucking is ongoing will be most seriously affected.

Figure 3. Most-likely food security scenario, April to June 2009



Source: FEWS NET Ethiopia and WFP

Figure 3. Worst-case food security scenario, April to June 2009



Source: FEWS NET Ethiopia and WFP

Finally, in Somali region (southern seven zones) and neighboring lowlands of eastern Oromia (lowlands of Borena, Bale and Guji), the *gu/genna* rains are expected to be normal. However, these areas will continue to be highly and extremely food insecure, given the length of time needed for pastoral recovery, continued market access problems, and inadequate and delayed food aid deliveries to these areas.

Worst-case food security scenario (April-June 2009)

In the worst case scenario in eastern *meher* producing areas, food prices may increase further in anticipation of a poor *belg* harvest and some areas may see labor opportunities decline even further if the *belg/gu/genna/sugum* rains are below-normal (e.g., late start, poor distribution, low precipitation totals). In this scenario, many households will face significant food deficits and current levels of food assistance will be insufficient to cover needs.

In *belg* producing areas of the northeast, the *belg* rains would be below normal in this scenario. As a result, these areas would experience a decline in demand for agricultural labor, further increases in cereal prices in anticipation of a failed *belg* harvest, and reduced availability of pasture and water. These effects would have serious food security implications and could result in atypical movement of people out of the area.

The *belg* rains would also be below-normal in *belg* dependent parts of SNNPR, and as a result the situation in sweet potato producing and coffee dependent areas will deteriorate even further. In addition, agricultural labor opportunities for other *belg* dependent areas of SNNPR will likely diminish and cereal prices will increase in anticipation of a failed harvest. In this scenario, high levels of malnutrition and unusual migration of people may occur if sufficient aid is not provided.

In Afar, *sugum* rains, the small rainy season in Afar, will perform poorly, leading to extreme scarcity of pasture and water availability. This will be the third consecutive season of poor rains in this area. Livestock productivity, body conditions, and livestock/cereal terms of trade will significantly decline. This will lead to high and extreme levels of food insecurity in the region.

In Somali region, failure of the main rainy season (*gu*) in the southeastern pastoral areas will lead to massive livestock mortality, high levels of internal displacement, destitution of pastoralists (due to the loss of livestock and livestock productivity and the lack of markets for livestock in poor conditions), a very severe shortage of water for human consumption, extremely high prices for cereals and other imported foods, a dearth of food in the markets, extremely high levels of acute malnutrition and high levels of child mortality.

Table 1: Scenario assumptions and key monitoring indicators

	Most Likely	Worst Case	Key monitoring indicators
Eastern meher	<ul style="list-style-type: none"> Cereal prices remain high Reduced access to agricultural labor opportunities PSNP beneficiaries will continue to receive food/cash assistance as planned. 	<ul style="list-style-type: none"> The <i>belg</i> rains fail Cereal prices increase further Agricultural labor opportunities unavailable 	<ul style="list-style-type: none"> <i>Belg</i> rainfall Price of staple grains Labor demand and wages Livestock prices
NE belg dependant	<ul style="list-style-type: none"> <i>Belg</i> rains in crop dependent parts of the country (February to May) expected to be normal Cereal prices remain high. Improved access to agricultural labor 	<ul style="list-style-type: none"> <i>Belg</i> rains in crop dependent parts of the country (February to May) below normal. Cereal prices increase further Loss of labor opportunities for poorer households 	<ul style="list-style-type: none"> Forecast and progress of the <i>belg</i> season Price of staple grains Labor demand and wages Livestock prices Milk production (little to no monitoring data available)

SNNPR	<ul style="list-style-type: none"> • <i>Belg</i> rains will be normal • Sweet potato production reduced by half • Coffee prices remain at 50 percent of reference year • Coffee labor demand and wages reduced by half 	<ul style="list-style-type: none"> • Below normal <i>belg</i> rains • Sweet potato butterfly infestation • Sweet potato production losses greater than 50 percent • Reduced agricultural labor opportunities in <i>belg</i> crop growing areas of the region • Cereal prices increase further • Coffee prices, production and wages the same as in the most-likely scenario 	<ul style="list-style-type: none"> • <i>Belg</i> rains • Agricultural labor demand and wages • Price of cereals • Sweet potato production • Coffee producer prices
Afar Region	<ul style="list-style-type: none"> • <i>Sugum</i> rains in Afar (February to May) expected to be normal. <ul style="list-style-type: none"> ▪ Reduced ToT 	<ul style="list-style-type: none"> • <i>Sugum</i> rains in Afar (February to May) expected to be below normal. • Livestock production and ToT declines further 	<ul style="list-style-type: none"> • <i>Sugum</i> rains • Price of cereals • Livestock prices • Milk production
Somali region and neighboring lowlands of Oromia	<ul style="list-style-type: none"> • <i>Gulganna</i> rains (April to June) normal. • Market access problems in parts of Somali Region continue • Livestock milk production is 0-50% of normal (because of decrease in births following 2008 <i>gulganna</i> rains) • Livestock/cereal ToT continue to be poor 	<ul style="list-style-type: none"> • Market access problems continue in parts of Somali Region • <i>Gulganna</i> rains (April to June) below normal • Livestock deaths • Little to no milk production • ToT reduces further 	<ul style="list-style-type: none"> • <i>Gulganna</i> rains • Price of cereals • Livestock prices • Milk production

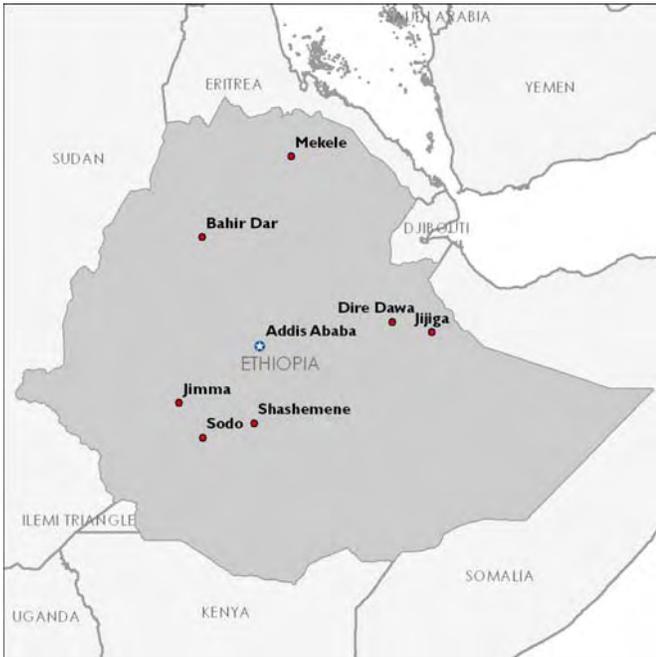
Conclusion

In the most likely scenario, in addition to the provision of appropriate and timely food and non-food assistance, there is a need to provide agricultural support for the *belg* crop producing parts of the country in order for them to benefit from the normal seasonal rains assumed under this scenario.

In all areas discussed, a worst case scenario heavily depends on the performance of the coming rainy season (*belg/gu/genna/sugum*). In crop producing parts of the country, (e.g., eastern Tigray, eastern Amhara, eastern Oromia and parts of SNNPR) and in the pastoral areas of Afar, Somali, and parts of Oromia and SNNP Regions, the situation will be manifested by widespread shortages of water, outbreaks of hunger-related diseases such as measles and meningitis, and widespread critical levels of acute malnutrition. Atypical movement of people may also occur. Assistance, both through the PSNP and emergency programs, will be much below the requirement in the chronically food insecure parts of the country in the worst case scenario, as well as in the areas that require emergency assistance.

If this scenario occurs, cropping areas will be highly food insecure, particularly in the second quarter of the year as the harvest from the *meher* season is depleted. In pastoral and agro-pastoral areas, the effects will be felt more immediately. In these areas, households are highly dependent on food purchases year round and the loss of food and income due to deteriorating livestock conditions and terms-of-trade can occur rapidly.

In the event that the *belg/gu/genna/sugum* rains are forecast to fail, the Government of Ethiopia (GoE) and its humanitarian partners must prepare a contingency plan to counter the potentially devastating effects on food security. This planning should focus on eastern parts of the country and southern and southeastern pastoral and agro pastoral areas. Food aid will remain a priority and the provision of full rations, along with improved targeting and monitoring, will be essential. There will also be a widespread need for water trucking in the eastern parts of the country (including the pastoral areas) and livestock interventions (timely, commercial de-stocking, veterinary care, and early vaccinations, at least for the breeding stock) to protect future livelihoods. Finally, nutrition and health interventions will likely need to be expanded, including therapeutic and supplementary feeding, as well as initiatives to address potential measles, meningitis and upper respiratory tract infection outbreaks.



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.

