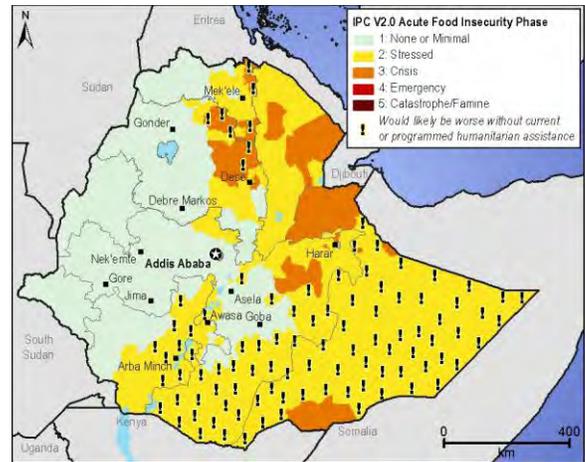


*The food security situation in the eastern part of the country remains stressed*

**KEY MESSAGES**

- Overall *Meher* production is expected to be near average, particularly in the western, surplus-producing areas. However, in some parts of the eastern, marginal, *Meher*-producing areas and in the *Belg*-dependent and sweet potato-producing areas in Southern Nations, Nationalities, and Peoples' Region (SNNPR), the harvest is expected to be below average due to soil moisture deficits, hailstorms, and flash flooding during the June to September *Kiremt* rainy season.
- The timely onset of *Deyr/Hagaya* rains in southern and southeastern parts of the country has helped improve livestock body conditions and productivity. The short season rains are likely to continue in these areas. However, areas at risk of resource-based conflict and at risk of flooding along the Shebelle river in Afder, Liben, and Shabelle (formerly Gode) Zones in Somali Region are expected to face increasing food insecurity.
- The price of grain from October to December is expected to show some seasonal decline but remain at its elevated level. From January to March, significant increases in grain prices are expected, which will significantly reduce the purchasing power of the market-dependent poor and the very poor.
- Although *Meher* production is expected to improve overall food availability, market access to food by poor and very poor households in the eastern, marginal, *Meher*-producing areas, in *Belg*-dependent and sweet potato-producing areas of SNNPR, and in pastoral and agropastoral areas of Afar, Borena Zone in Oromia, and Somali Regions will be limited. Food insecurity in these areas is likely to be higher from January to March and require humanitarian interventions.

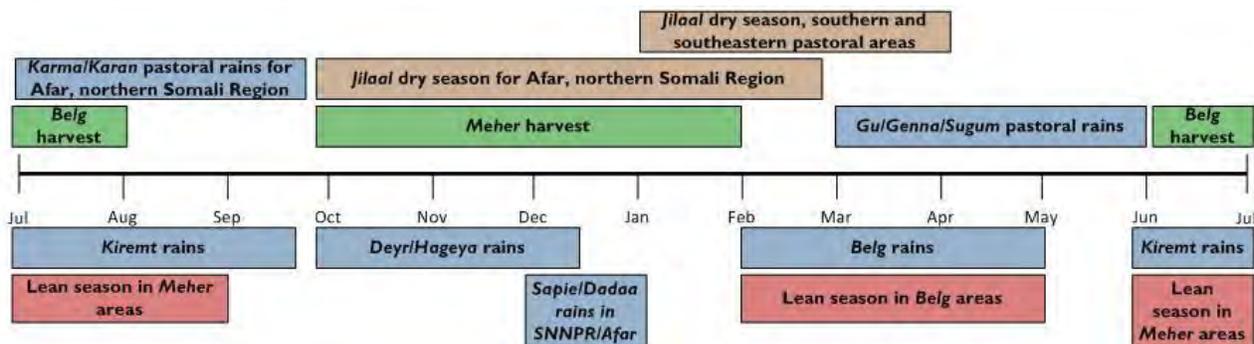
**Figure 1** Current food security outcomes, October 2012



Source: FEWS NET Ethiopia

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. Visit [www.fews.net/foodinsecurityscale](http://www.fews.net/foodinsecurityscale) for more on this scale.

**SEASONAL CALENDAR FOR A TYPICAL YEAR**



Source: FEWS NET Ethiopia

**NATIONAL OVERVIEW**

*Current Situation*

This year the June to September *Kiremt* rains were average to above average in most areas. The rains allowed for typical, seasonal agricultural livelihood activities, more or less at typical times of year. This year input utilization increased, particularly in the western parts of the country. Compared to last year, an additional one million quintals (100,000 metric tons (MT)) of fertilizer and improved seeds were used. More than 95 percent of *Meher* agricultural land was cultivated. So far, the *Meher* crop is reported to be near average to slightly above average, particularly in the surplus-producing western areas.

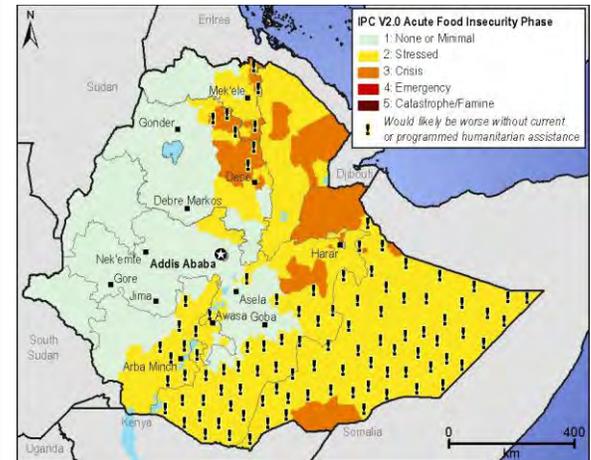
For most of the population in Ethiopia, the June to September lean season is ending with the start of the main season October to January *Meher* harvest. Fresh harvests have begun to be available at the household level for consumption, effectively ending the lean season in much of the country.

The July and August *Belg* harvest this year was well below average. Based on the Central Statistical Agency (CSA), *Belg* production was estimated at 45 percent and 26 percent lower compared to that of 2008, a year of relatively good *Belg* production, and the five-year average, respectively. This low production has reduced food access for the poor and very poor households in *Belg*-producing areas of the country. Primarily due to the poor *Belg* season, the number of people who require humanitarian assistance increased from 3.2 million to 3.7 million in August 2012. In addition to staple crops, the poor *Belg* rains have also affected the coffee cash crop. The expected low production during the October to December harvest coupled with the decline in global coffee prices has reduced income from coffee exports for coffee producers this year, though the peak coffee export period will be later in the year in February. While income from coffee exports has declined at the national level, there was also a substantial decline in income from coffee labor for the poor and very poor households in the coffee-producing areas of the country, especially Sidama and Gedio Zones in SNNPR and East Haraghe in Oromia Region.

Staple food prices typically start to decline in October. However, high demand, high inflation, and the poor *Belg* harvest are keeping prices high and rising this year. In August and September, food prices of most grains and pulses increased. Prices remain well above last year and the five-year average. The only exceptions to the high and rising prices are maize prices, which declined slightly from August to September. According to CSA's September consumer price index (CPI) report, food price inflation reached 19 percent at an annualized rate. Like the prices for staples, high and growing demand for meat, both domestically and in neighboring countries, has slightly increased livestock prices in most parts of the country. While the livestock-to-cereals Terms of Trade (ToT) do not favoring poor households in the highlands, prices in the lowlands have created ToT relatively favorable for poor livestock producers.

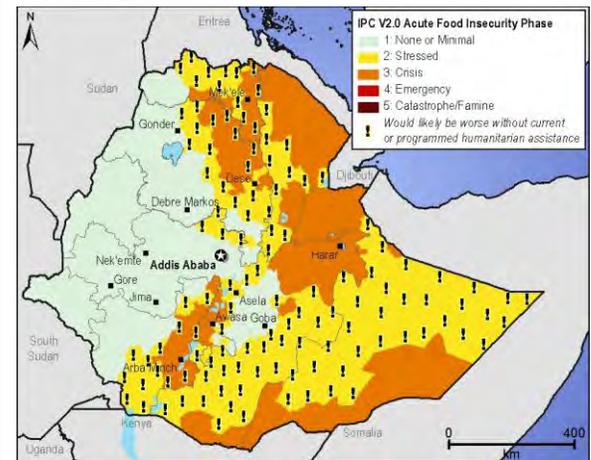
With the start of the main season *Meher* harvest in Oromia, SNNPR, eastern Tigray, and Amhara, food security has improved as households move out of the lean season. The average to above average *Kiremt* rains have also substantially improved livestock's physical conditions due to the improved availability of pasture and water. In the southern and southeastern pastoral areas, the start of the *Deyr/Hageya* rains in October has already had generally a positive impact on water availability and pasture conditions.

**Figure 2.** Projected food security outcomes, October to December 2012



Source: FEWS NET Ethiopia

**Figure 3.** Projected food security outcomes, January to March 2013



Source: FEWS NET Ethiopia

These maps represent *acute* food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect *chronic* food insecurity. Visit [www.fews.net/foodinsecurityscale](http://www.fews.net/foodinsecurityscale) for more on this scale.

Limited humanitarian access in Somalia and conflict in Sudan, South Sudan, Kenya, and Eritrea has resulted in a significant influx of refugees into Ethiopia. Today, Ethiopia is hosting 372, 000 refugees, a 22 percent increase over the last year.

### Assumptions

Over the coming six months, projected food security outcomes are based on the following key assumptions:

With prices in international markets high and likely to remain so, donors may face difficulty procuring similar quantities of food compared to previous years. These high international prices are expected to reduce the volume of humanitarian assistance, especially in-kind food aid, imported compared to recent years.

- Kiremt rains since August have improved soil moisture and growing conditions. The start of the *Meher* harvest is also indicating near average to slightly above average volumes. Therefore, an average October to January national *Meher* harvest is assumed.
- According to the latest, seasonal forecast by the National Metrological Agency (NMA), the October to January *Bega/Deyr/Hagaya* rains are expected to be normal to above normal in the southern and southeastern parts of the country. These rains are expected to result in seasonal improvements in pastoral and agropastoral conditions. The Southeast is expected to have above normal to normal *Deyr/Hagaya* rainfall that would improve pasture and water availability. Seasonally improved environmental conditions are expected to lead to improved livestock body conditions and normal, seasonal livestock productivity, including milk production.
- Unseasonal rains may reduce the October to January *Meher* harvest in some pocket areas by increasing post-harvest losses or spoiling crops in the field. While losses will stress the areas involved, national grain availability is unlikely to be significantly affected by these losses.
- The Productive Safety Net Program (PSNP), the government's cash and food transfer programme for 6.89 million chronically food insecure people, is expected to take place, as usual, from January to June 2013.
- Prices of livestock are expected to continue moderately increasing throughout the scenario period, particularly in the southeastern areas due to the anticipated improvement in livestock body condition and increasing demand.
- The trend of a high number of refugee arrivals will continue to stress the resources available. With increasing stress on local markets, price increases are expected in the host communities in southern Somali, northern Tigray, Benshangul Gumuz, and Gambella Regions.

### Most Likely Food Security Outcomes

The western, surplus-producing parts of the country are expected to continue to face None or Minimal (IPC Phase 1) acute food insecurity due to the availability of *Meher* crops for own consumption and improved access to income, including *Meher* crop sales. In general, while average to slightly above average *Meher* production is anticipated at the national level, a reduction in long-cycle crop production is expected due to the late harvest of *Belg* season crops that reduced the planted area of long-cycle crops during the *Meher* season. Following the October to January *Meher* harvest, food availability will also improve in the eastern parts of the country, but in some areas, the harvest is expected to be very poor. In the areas where the *Meher* harvest is poor in the eastern part of the country, household stocks from the harvest will be quickly exhausted, and the consumption level for the poor and very poor households will be reduced from January onwards. This is mainly due to low food availability both from the *Belg* and the *Meher* harvests this year.

Though the cultural practices of food consumption might affect the nutritional status of the western parts of the country, the general nutritional status of the population in this area is expected to be in good shape. On the other hand, due to the past recurrent food gaps and the anticipated low food access in some areas of the eastern parts of the country, including pastoral and agro pastoral areas, a significant number of children under five and pregnant and lactating women are likely to be malnourished, unless adequate interventions are provided on time. Therefore, the majority of the population in the western areas are able to meet their essential food and non-food needs without engaging in atypical, unsustainable coping strategies to access food and income, so they are classified as None or Minimal (IPC Phase 1) from October to March. On the other hand, the majority of the poor and very poor households in the eastern half of the country will be Stressed (IPC phase 2) from October to March. However, in some areas, including eastern and southern Tigray, northeastern Amhara, northeastern Afar, northern Somali, the northern half of SNNPR, and the southernmost areas of Somali, households are likely to be in Crisis (IPC Phase 3). The worst affected areas will be in Crisis (IPC Phase 3) from October to December, but most areas will enter this phase from January to March. Due to the overall, nationwide improvements, a slight decline in the number of humanitarian beneficiaries is expected following the *Meher* assessment in December and January, primarily due to anticipated average to slightly above average *Meher* production and the average to above average *Deyr* rains in the

southeastern parts of the country. Refugee-related needs will continue to increase with new arrivals from October to March.

## AREAS OF CONCERN

### Southern and southeastern pastoral and agropastoral areas

#### *Current situation*

Following the near normal March to May *Gu/Genna* rains and the normal June to September *Hagaa/Bona* long dry season, the October to December *Deyr* short rains season started at the end of September, about two weeks earlier than usual in most of Somali and southern Oromia. But, the rain during the March to May *Gu/Genna* was not temporally well distributed enough to support crop cultivation in some of the riverine and agropastoral areas of Somali Region.

Current pasture and water availability is near normal in most areas. In addition to the rains, cloud coverage during the July to September dry season, particularly in Borana Zone in Oromia Region, moderated evapotranspiration, preserving water and pasture. The slightly early onset of the October to December *Deyr* rains also meant that pasture and water conditions did not deteriorate quite as much as they do in a typical year. As a result, the condition of livestock in southern and southeastern pastoral and agropastoral areas is normal. No major livestock disease outbreaks have been reported over the past few months, helping to preserve acceptable body conditions and livestock health.

Normal conditions during the 2011 October to December *Deyr/Hagaya* and the 2012 March to May *Gu/Genna*, led to a better level of cattle, camel, sheep, and goat conceptions during these seasons. In September and October, cattle which conceived in the October to December *Deyr/Hagaya* and goats and sheep which conceived in the March to May *Gu/Genna* had a relatively normal level of births. The recent calving has meant that cattle and camel milk production has remained generally normal this year. Though the past two rainy seasons have improved conditions for livestock, the livestock holdings of the poor and very poor pastoral households have not yet fully recovered, as herd sizes remain below a sustainable level due to losses during recurrent droughts through 2011. Milk production has generally been normal, but there are some areas in Afder, Shebelle (formerly Gode), Jarar (formerly Deghabur), Liben, Dollo (formerly Warder), and Nogob (formerly Fik) Zones where milk production remains low, related to localized rainfall deficits.

Despite rains during the past two rainy seasons across most of the southern and southeastern pastoral areas, several pocket areas in southern and central Somali Region as well as parts of lowland Bale Zone in Oromia Region received very little rains during the March to May *Gu/Genna*, resulting in poor availability of both water and pasture. With the June to September long dry season, in the most affected localities, pasture depleted earlier than normal, forcing pastoralists and their herds to migrate farther to areas with better pasture and water. Such migrations resulted in high concentrations of livestock in some pocket areas, leading to an early depletion of resources in those areas. Early depletion further increased the distance being traveled by livestock between the grazing and water points. The long distance trekking has affected livestock body conditions in some of these areas. Though the current *Deyr/Hagaya* rains is improving access to drinking water, water shortages still exist in some woredas of Shebelle (formerly Gode), Dollo (formerly Warder), Afder, Liben, Jarar (formerly Deghabur), Korahe, and Nogob (formerly Fik) Zones of Somali Region and in some woredas of Bale Zone of Oromia region.

Although slightly lower staple food prices were reported in September, primarily due to the availability of food assistance, prices of staple commodities continue to be elevated compared to previous years. While food prices remain high, livestock are fetching higher prices this year compared to last year. For example, the price of cattle in Shebelle (Gode) market was ETB 1700 and ETB 2000 in September 2011 and 2012, respectively. Similarly, the price of average size shoat was in the range of ETB 350 to ETB 400 in September 2011 while it was in the range of ETB 750 to ETB 900 in the same month in 2012. Increased market demand coupled with the good physical conditions are factors explaining the rising livestock prices.

In Liban Zone of Somali Region and Borana Zone of Oromia Region, resource-based conflict persists. Agropastoralist areas in Bale, Guji, and Borana are preparing their land for planting in October following the ontime start of *Hagaya* rains. Following the poor spatial and temporal distribution of the March to May *Gu* rains, the high input prices, especially for fuel for generators to run irrigation pumps, several pest outbreaks, and unexpected, but localized floods, *Gu* crop production was relatively poor in the riverine and agropastoral areas Liben, Afder, Shebelle (formerly Gode), Korahe, and Jarar (formerly

Deghabur) Zones of Somali Region. In these agropastoral areas, crop production from the *Gu* covers between 33 and 54 percent of annual food needs. Poor production already had an adverse impact on local food availability, and the lack of locally produced food is one factor keeping prices high.

Admissions to therapeutic feeding programs (TFP) declined from June to September in most of the southern and southeastern pastoral and agropastoral areas. The decline is attributed to ongoing humanitarian interventions, including health and nutrition assistance programs. The current food consumption of the poor and very poor households has remained below normal, leading to increased livestock sales to cover food needs. Therefore, the majority of the resource-poor pastoral and agropastoral households are Stressed (IPC Phase 2) even with the continued provision of humanitarian assistance.

### *Assumptions*

In addition to the general assumptions given at the national level, over the coming six months, projected food security outcomes for the southern and southeastern pastoral and agropastoral areas are based on the following assumptions:

- During the October to December *Deyr* rains, flooding along the Wabi Shebelle River is expected, mainly in the lower parts in Shabelle, Kelafo, and Mustahi Woredas of Shebelle (formerly Gode) Zone. River flooding is expected to have a positive impact of increasing nearby pasture growth but a negative impact on crops already in the fields when the flooding occurs.
- Due to the anticipated continuation of humanitarian assistance in southern and southeastern pastoral and agropastoral areas and the influence of the October to January *Meher* harvest in the highlands, the grain prices in these areas, unlike in the rest of the country will likely remain relatively stable at their current high levels or show slight declines from October to December.
- The dry period of December 2012 through March is expected both to start and end on time. During the dry period, pasture and water shortages are possible, particularly in January and February.
- Conflict over resources is likely to be intensify in Liben Zone of Somali Region and Borana Zone of Oromia Region, especially during the January to March dry period.

### *Most Likely Food Security Outcomes*

The anticipated average to above average October to December *Deyr/Hagaya* rains will regenerate water points and pasture, improving livestock productivity. Milk production of all livestock species is likely to continue normally from October through December 2012 due to normal rains and adequate recent births. Seasonally normal milk production contributes to improved food availability as does access through market purchases funded by livestock and livestock product sales between October and December 2012. However, low milk production in some areas of Afder, Shabelle (formerly Gode), Jarar (formerly Deghabur), Liben, Dollo (formerly Warder), and Nogob (formerly Fik) Zones of Somali Region, particularly from January through March 2013 period, will reduce consumption in those areas. Since the dry period from December through March is likely to intensify again the shortage of pasture and water in some areas, food consumption is likely to be reduced from January through March 2013 in the affected areas.

Regardless of the favorable climactic outlook for October through December 2012, the negative impact of recurrent droughts over the past few years along with the anticipated normal dry period from January to March and elevated food prices from December 2012 through March 2013, will limit the livelihood recovery. Herd sizes have reportedly declined from a combination of deaths and an abnormally high number of sales. This is likely to have an impact on the future sustainability of livestock holdings. In these areas, on average according to baseline household economy data revised in 2008, between 56 and 83 percent of the food of the poor and very poor pastoral households comes from market purchases. These purchases are funded with income generated from livestock sales which generates 75 percent of cash income, self-employment which generates 14 percent of cash income, and local casual labor which generates 8 percent of cash income. As a result, household access to food and cash income will reduce, and food consumption will decrease from December 2012 to March 2013.

With the exception of areas around Dollo Ado, poor and very poor households will remain Stressed (IPC Phase 2) even with uninterrupted humanitarian food assistance from October to December 2012. However, in the period January to March 2013, poor households in the areas with high risk of flooding along the Wabi Shabelle River, at risk of intensified conflict in Liben Zone of Somali and Borana Zone of Oromia, and in the areas around Dollo Ado refugee camp will be in Crisis (IPC Phase 3) while the remaining areas will remain at the Stressed (IPC phase2) level of food insecurity.

## Major sweet potato-growing zones and dominantly *Belg*-producing southern woredas of SNNPR

### *Current Situation*

Late and poor February to June *Belg* rains led to a delayed and well below average *Belg* crop. The *Belg* rains were up to five weeks late in parts of SNNPR. Consumption of *Belg* haricot beans and green maize typically starts in July and August. This year, due to delays in the start of the *Belg* rains and in planting *Belg* crops, green consumption started one to two months late in August or September as the crops were not mature enough to consume. When green consumption did begin in August and September, poor households had no stocks and were in an extended lean season with extended dependence on market purchases. With few alternative sources of food, green consumption intensified, reducing the dry harvest, especially for haricot beans. The CSA estimates that 2012 *Belg* cereal production in SNNPR is only 64 percent and 81 percent of last year and the four-year average, respectively.

Following the very late *Belg* rains and poor crop performance, the June to September *Kiremt* rains started on time at the end of June. The amount of this year's *Kiremt* rainfall was normal in most areas, and distribution was favorable for agricultural production. Hailstorms, flooding, and landslides in July affected *Meher* crops including teff, wheat, barley, and root crops in some areas. Erratic distribution of rainfall during August and below average seasonal rainfall totals affected some pocket areas, including in parts of the lowlands of Segen, Hadiya, Wolayta, Gamo Gofa, and Sidama Zones. Typically, after mid-September, the rains slowly retreat from the northeastern areas towards the southwestern parts of SNNPR. This year though, the retreat has been slower than usual, so showers to medium amounts of rainfall fell in October. These rains should be beneficial for late-planted crops, and for continued replenishment of water sources and pasture, particularly in the lowland areas that had poor June to September rainfall totals. Overall, the June to September *Kiremt* rains were favorable for short-cycle *Meher* crops, which are typically harvested from October to December.

The area planted with *Meher* crops is about 85 percent of the government's plan. The less than planned *Meher* planted area is primarily due to the late harvest of *Belg* maize in August and September. *Belg* maize occupied land that ordinarily would have been replanted with short-cycle *Meher* crops in July and August. The drop in area planted due to the delay of *Belg* maize harvesting has had the largest effect in the double-cropping, bimodal areas of the midlands and lowlands of Gamo Gofa, Wolayta, Kembata Tembaro, Hadiya, and Sidama Zones. Normally, sweet potatoes and other root crops are planted in May and June for harvesting between October to December. Due to repeated sweet potato crop failures, very few cuttings were available at the time of the planting. The majority of farmers who would have planted sweet potatoes shifted the land to other short-cycle crops such as teff or haricot beans.

*Kiremt* rainfall in July and August helped regenerate pasture and renew water sources. Current pasture and water availability is largely normal. However, pasture availability is under stress in the lowlands of Segen, Hadiya, Wolayta, Gamo Gofa, and Sidama Zones due to moisture deficits. The body conditions of livestock are largely normal. There has been no report of major animal disease outbreaks in SNNPR. However, there are cases of trypanosomiasis in lowland areas of Gamo Gofa, Dawro, Wolayta, Kefa, and Bench Maji Zones, which is typical during this season. Disease control measures are being taken, but the continued spread of the disease within its normal range is likely.

The prices of cereals such as teff, wheat, and barley, pulses such as beans and peas, and roots crops such as Irish potatoes remain high or have slightly increased in the months of September and October compared to previous months, but price remain high above the five-year average. On the other hand, the price of maize is slightly declined due to the new harvest. Maize prices remain higher than last year. For instance, at Shashemene, the wholesale price of maize in October 2012 was ETB 533 per quintal (100 kilogram (kg) sack) which is from two to five percent lower than the July to September prices and six percent higher than October 2011. On the other hand, the price of livestock is generally stable with the exception of the price of goats and sheep which increased in price in connection with holidays in September.

The improved access to cabbage production in July and August, the provision of relief food assistance for *Belg* beneficiaries in September, and the current season's green and dry harvests in September and October helped to improve the household level food consumption and nutritional status. As a result, the total number of malnourished children under the age of five admitted to outpatient therapeutic programs (OTP) has significantly reduced. Though most poor and very poor households are unable to afford some essential non-food expenditures such as health and education, the majority of them have minimally adequate food consumption without engaging in irreversible coping strategies. Therefore, the current food security condition in this area is classified as Stressed (IPC Phase2).

### Assumptions

In addition to the general assumptions given at the national level, over the coming six months, the projected food security outcomes for the major sweet potato-growing zones and dominantly *Belg*-producing southern woredas of SNNPR are based on the following assumptions:

- Unseasonable rains in the crop dependent areas will fall in October and November as forecast by the National Meteorology Agency's (NMA) latest seasonal forecast. Normal *Sapie* rains are expected in January and February 2013. The *Belg* rains are also expected to begin on time in February.
- The shortage of sweet potato cuttings to be planted in October and November will lead to lower the sweet potato production in May and June 2013. While some households may receive sweet potato and other root crop cuttings through United Nations (UN) agencies' or non-governmental organizations' (NGO) programs, overall, demand for cuttings is expected to be unmet for many households.
- A shortage of *Belg* crop seeds is likely given consecutive poor *Belg* seasons.
- Though the staple food prices are expected to show a slight decline from October and November, following the *Meher* harvest, prices are likely to rise again from December 2012 to March 2013 due to below-average 2012 *Meher* and *Belg* production within SNNPR, continued expectations for high food price inflation, and high demand.

### Most Likely Food Security Outcomes

The current food consumption level has temporarily improved due to improved access to cabbage production, the *Belg* haricot bean harvests, the start of both *Belg* and *Meher* green consumption, and the start of the *Meher* harvest in October. The nutritional situation has shown improvement over the past few months. In the month of May, the total number of malnourished children admitted to the outpatient therapeutic programs (OTP) in SNNPR was 14,909. This was reduced to 8,049 in July, a 46 percent decline. Although statistics were not available, further reductions were reported in August and September.

The prices of cereals are likely to remain high from October to March with a significant increase from January to March 2013, following the start of the February to May 2013 lean season. Increasing prices will lead to a further decline in the purchasing power of poor households. Despite with shortage of planting materials, the expected unseasonable rainfall in October and November provide good conditions for the planting of sweet potatoes. The normal December and January *Sapie* rains will also be conducive for the growth of sweet potatoes. However, as the sweet potato cuttings shortage will likely persist, the total planted area for sweet potatoes would remain below average and the total volume of production during the lean season is likely to be below average. With a likely early start of the lean season due to poor production and the lack of sweet potatoes as a bridge crop to consume during the lean season, poor households will likely be in Crisis (IPC Phase 3) in February and March, despite the presence of both PSNP and emergency assistance.

### Eastern marginal *Meher*-producing areas

#### Current Situation

The *Belg* harvest in July and August was poor due to the below average and late *Belg* rains this year. According to the CSA, total cereal production in Amhara region, for example, declined by more than 32 percent from last year. In some livelihood zones in North Wollo, *Belg* production is a significant component of total food consumption. In some of these areas, the decline of the *Belg* season harvest compared to last year was more than 75 percent. However, the *Meher* is the main crop production season in the eastern, marginal, *Meher*-producing area, and its productivity depends on the June to September *Kiremt* rains. This year's *Kiremt* rain performance was close to average in terms of onset, amount, distribution, and cessation. *Meher* season agricultural activities were undertaken at normal times, and crop performance has been mostly normal. According to the information obtained from the regional early warning and food security office, more than 99 percent of the land planned by the government for the *Meher* was sown.

Currently, following their typical phenological stage, the sown crops are at the growing, flowering, seed setting, and harvesting stages. In some areas, households have started consuming green crops. While harvesting of barley is ongoing in parts of East Tigray, short-cycle crops are at the vegetative stage in East and West Hararghe. Although overall performance of the rains was average to above average, in a few areas the rains were erratic with poor rainfall both in terms of amount and distribution. Hot and dry weather coupled with the early cessation of rains in a few areas also reduced yields. The affected areas include Erob, Haintallo Wajirat, Raya Azebo, Emba Alaje, Tsead Amba, and Endemhoni Woredas in the

eastern and southern zones of Tigray region, Raya Kobo, Habru, Gubalafto, and Gidan Woredas in North Wollo Zone, Kalu, Tehuldere, Dessie Zuria, and Worebabo Woredas in South Wollo Zone, Kewet and Efrata Woredas in North Shewa Zone, and almost all woredas of Oromia Zone in Amhara Region. Similar poor performance of rains was also observed in Golo Oda, Kumbi, Kurfachele, and Babile Woredas of East Hararghe Zone. Moreover, hazards like floods, hailstorms, pests, and plant diseases have been reported in some pocket areas that caused significant crop damage. Affected crops include maize, sorghum, teff, barley, beans, and field peas. However, the incidence of pests and plant diseases was not particularly high this year as the seasonal, average to above average rain was not favorable for pest multiplication or the spread of plant diseases.

The good June to September *Kiremt* rains led to improved availability of pasture and water in most parts of the eastern, marginal, *Meher*-producing areas, resulting in significant improvements in livestock body conditions. However, in some woredas like Kumbi, Babile, Chickesen, and Golo Oda in East Hararghe Zone, and Bokie, Burka Dhintu, and Oda Bultum in West Hararghe Zone, livestock body conditions and productivity remains poor due to a scarcity of pasture and water following the locally poor June to September *Kiremt* rains.

Prices of staple foods remained stable at their elevated level between August and September, and no significant price reduction following the start of the *Meher* harvest has been observed so far. For instance, the September average price of beans in Amhara region remains close to the ETB 1,000 per quintal (100 kg sack) it has been since July 2012. On the other hand, staple food prices are much higher than prices from the previous two years. Compared to the September 2010 price, increases of 139 and 58 percent were reported for maize and sorghum, respectively, for the September 2012 prices in Bedessa in West Hararghe Zone. At the same time, in most markets of East and West Hararghe Zones, livestock prices increased from August to September, but they remained the same in most parts of eastern Amhara and Tigray.

Due to the poor *Belg* season, elevated staple food prices, and crop damage caused by weather hazards, poor households in parts of Wag Himera, eastern woredas of North and South Wollo, Raya Azebo and Alamata Woredas of South Tigray, and parts of Tsead Amba and Endemehoni Woredas of East Tigray Zone are currently facing food consumption gaps. Selling off livestock to meet their minimum food needs is depleting livelihood assets, and households are facing the Crisis (IPC Phase 3) level of food insecurity. On the other hand, although currently poor households in the remaining woredas do not have enough resources for essential non-food expenditures, they are able to obtain a minimally adequate food consumption from the new harvest, supplemented by humanitarian assistance, and therefore they are experiencing the Stressed (IPC Phase 2) level of food insecurity.

### Assumptions

In addition to the general assumptions given at the national level, over the coming six months, projected food security outcomes for the eastern, marginal, *Meher*-producing areas are based on the following assumptions:

- Below normal October to December *Meher* production is anticipated in the eastern, marginal, *Meher*-producing areas due to the poor performance of the June to September *Kiremt* rains in areas, the early cessation of the rains in some areas, and weather hazards in some woredas. Staple food prices are expected to be stable in November and December due to the new *Meher* harvest, but from January to March prices are expected to start rising due to the below normal production in the lowland woredas of the eastern, marginal, *Meher*-producing areas.
- On the other hand, good livestock body conditions are expected to improve their prices. Households with a reasonable number of livestock are expected to obtain a better income and be able to absorb the increase in staple food prices.
- Anticipated good oilseed production in western Amhara and Tigray is expected to provide opportunities for labor migrants from the eastern parts of those two regions from October to December. However, the falling international vegetable oil and oilseed price may constrain both producers' income and laborers' wages.

### Most Likely Food Security Outcomes

*Meher* production from the lowland woredas of East and West Hararghe, Erob, Haintallo Wajirat, Raya Azebo, Tsead Amba, and Endemehoni Woredas of East and South Tigray Zones in Tigray region, Raya Kobo, Habru, Gubalafto, and Gidan Woredas of North Wollo, Kalu, Tehuldere, Dessie Zuria, and Worebabo Woredas of South Wollo Zone, Kewet and Efrata Qoredas of North Shewa Zone, and almost all woredas of Oromia Zone in Amhara Region is expected to be much below normal. Moreover, poor households in these areas will be more dependent on purchases from October to March due to reduced food consumption from own production as a result of weather hazards which have reduced yields and damaged crops.

Food prices are already high, and further increases in staple food prices due to the expected poor harvest will increase food consumption gaps. Moreover, due to the expected below average production in the mentioned woredas, income from crop sale will be below average and other sources of income like income from labor will only be able to cover minimum food needs. Households will be forced to accelerate asset depletion to cover food expenses. Therefore, poor household in the above mentioned woredas are expected to be at the Crisis (IPC level 3) level of food insecurity from October 2012 to March 2013.

Overall production from other parts of the eastern, marginal, *Meher*-producing areas, excepting those woredas mentioned above, is expected to be near normal. This will help poor households access food from their own production and will improve household income from crop sales following the October to December harvest. Due to the small landholdings of the poor and the low yields obtained under normal conditions, even with a normal harvest, income from agriculture alone would not cover some essential nonfood expenditures for poor households. Income from other sources is expected only to support minimally adequate food consumption. Therefore, most of the woredas excluding those woredas mentioned above, are expected to experience the Stressed (IPC level 2) level of food insecurity from October 2012 to March 2013.

## Afar and northern Somali Region

### *Current Situation*

The July to September *Karma* rainy season is the primary rainy season for Afar Region. Although variations were observed within the region, the onset of this year's *Karma* rain was mostly timely, and the amount, distribution, and duration of the rains were normal in most parts of the region. However, the rains were below normal and erratically distributed in Kori, Serdo, and Elidaar Woredas in Zone 1, and in Biidu and Erebtii Woredas in Zone 2. In the woredas where the rains performed poorly, water scarcity has been reported. Water trucking has already begun in Serdo Woreda due to the severity of the shortage. However, browse and water availability improved due to the good *Karma* rains in most parts of the region. The main water sources both for human and livestock were replenished, and browse availability increased. Livestock body conditions have, subsequently, improved, except in Kori, Serdo, Elidaar, Biidu, and Erebtii Woredas. Despite the good *Karma* rains, recurrent drought has led to repeated overgrazing of pasture and caused land degradation in many areas. Therefore, improvements in pasture availability are often short-lived throughout the region. The majority of the population of Afar region is pastoralists and about one tenth is agropastoralists. The good performance of the *Karma* rains this year has favored crop production, both in rainfed areas such as Abaala and Argoba Woredas and in those which use flood recession to irrigate in Dalool and Kuneba Woredas.

Similarly, the onset of July to September *Karan* rains in the northern parts of Somali Region was timely. However, the distribution and the total amount was below normal in July. Performance of the rains improved in August, but, generally, the rains were erratic. The majority of the woredas in both Fafan (formerly Jijiga) and Siti (formerly Shinile) Zones were dry. Exceptions included parts of Dembel, Mieso, Afdem, southern Erer, Awbere, Gursum, and parts of Tuliguld. In addition, the majority of Siti (formerly Shinile) Zone remained dry during the second and third week of August. Performance of the rains improved in September in all woredas of Fafan (formerly Jijiga) and Siti (formerly Shinile) Zones except in a few pockets in each woreda. According to the report obtained from the region, the performance of the *Karan* rainfall is considered as normal to above normal in parts of Afdem, Meiso, Hadagalle, southern Erer, Dembel, Gursum, Babile, Tuliguled, and Awbare Woredas. On the other hand, near normal to normal *Karan* rainfall was observed in majority of Kabribeyah, areas east and southeast of Jijiga, northern Erer, north of Shinile, and parts of Ayisha Woredas. Despite the above mentioned irregularities in rainfall, pasture and water availability has improved in both Fafan (formerly Jijiga) and Siti (formerly Shinile) Zones. Pasture quality and quantity is currently good in most areas of Fafan (formerly Jijiga) and Siti (formerly Shinile) Zones except few localities in each woreda. Livestock body conditions have also improved, and milk availability has also considerably increased. The relatively good *Karan* rains have replenished *birkads* and natural water catchments. They have also made the seasonal Fafan river flow, increasing the availability of water for both human and livestock consumption. Due to the relatively good performance of *Karan* rains, the planted crops in Fafan (formerly Jijiga) Zone and some pocket areas of Siti (formerly Shinile) Zone are in relatively good condition.

In Afar Region, cereal prices are increasing. For instance, the price of a 50 kg sack of wheat increased from ETB 200 in August to ETB 350 in September in Werer. In Awash, a 50 kg sack of wheat increased from August to September from ETB 300 to ETB 400. However, due to the continuous supply of relief food, therapeutic supplemental food (TSF), and PSNP commodities, staple food prices, particularly cereals, are stable in Somali except in Siti (formerly Shinile) Zone. In Shinile town, the price for 50 kg of relief wheat in September increased 13 percent since last year. On the other hand, livestock

prices increased both in Afar and in northern Somali due to good body conditions. A local slaughter goat or sheep price on the main market in Jijiga increased from ETB 1,000 in July to ETB 1,500 in September. Similarly, the price for goat has increased from ETB 400 in August to ETB 650 in September in Jijiga. The relatively high increase in livestock prices compared to cereals prices has improved the terms of trade, benefiting pastoralists. A pastoral household in Afar Region is able to purchase one and a half sacks (75 kg) of wheat by selling one average sized goat. As recently as June, it was only possible to buy 50 kg of wheat by selling a goat. Due to the below normal *Karma* rain in Kori, Serdo, and Elidaar Woredas of Zone 1, and Biidu and Erebtu woredas of Zone 2, income from livestock and livestock product sales, the primary source of income to fund market purchases of food, is reduced. Accordingly, while the mentioned woredas are currently at the Crisis (IPC Phase 3) level of food insecurity, poor households in the remaining parts of Afar are Stressed (IPC level 2). Due to below average 2012 March to June *Gu* rains, the increase in staple food prices, and recurrent depletion of livelihood assets, most parts of Shinile, Harshin, and Babile Woredas of Fafan (formerly Jijiga) Zone are currently at the Stressed (IPC Phase 2) level of food insecurity while the remaining parts of northern Somali are in Crisis (IPC Phase 3).

### Assumptions

In addition to the general assumptions given at the national level, over the coming six months, projected food security outcomes for Afar and northern Somali are based on the following assumptions:

- According to the latest weather forecast released by the NMA, some unseasonal rain is expected between October to December in some parts of the area due to the onset of El Niño effect. These rains will prevent early depletion of pasture and water.
- Livestock prices are expected to further increase in October due to the Eid Arafat festival at the end of October. Livestock are expected to retain their higher prices from November to March 2013 due to the expected good body conditions and high demand at the national level.

### Most Likely Food Security Outcomes

The below normal *Karma* rains in Kori, Serdo, and Elidaar Woredas of Zone 1, and Biidu and Erebtu Woredas of Zone 2 led to deteriorating livestock body conditions. Livestock body conditions are not expected to improve until the *Sugum* rains start in mid-March 2013. This decrease the incomes of poor households and make them unable to afford adequate quantities and quality of food from October 2012 to March 2013. Similarly, the erratic nature of *Karan* rains observed in most parts of Siti (formerly Shinile) Zone and in Harshin and Baile Woredas of Fafan (formerly Jijiga) Zone is expected to reduce both the volume of crop production and the availability of water and pasture for livestock. This will reduce the ability of households to consume from their own agricultural and livestock production, and important source of food, or to sell these goods, an important source of income. In addition, expected price increases for staple foods as well as the decline in livestock-to-cereal ToT caused by deterioration in livestock body conditions will reduce the purchasing power of the poor. Accordingly, the poor and the very poor households in Siti (formerly Shinile) Zone and in Harshin and Babile woredas of Fafan (formerly Jijiga) Zone, and poor households in Kori, Serdo, and Elidaar Woredas in Zone 1 and in Biidu and Erebtu Woredas in Zone 2 of Afar will face food consumption gaps. They will experience the Crisis (IPC Phase 3) level of food insecurity from October 2012 to March 2013.

The good June to September *Karma/Karan* rains in the remaining parts of Afar and northern Somali have improved water and pasture availability, which, over time, improved livestock body conditions and crop performance in pastoral and agropastoral areas. This is expected to enable poor households to acquire enough quantity and quality of food for minimally adequate consumption. As the poor households still possess a minimum number of livestock and cultivatable land size, their income and production is not expected to enable them to afford all essential non-food expenditures. Therefore, most of the poor households in Afar and northern Somali, except those living in the above mentioned woredas, will experience the Stressed (IPC Phase 2) level of food insecurity from October 2012 to March 2013. An exception will be poor households in the northeastern parts of Afar that will experience Crises (IPC Phase 3) from January to March 2013. The main reason for this change in the level of food insecurity is attributed water shortages in the area which cannot easily be alleviated with this *Karma* rain. As households will spend too much of their income on water, they will be unable to acquire enough food during the dry season.

**EVENTS THAT MIGHT CHANGE THE OUTLOOK****Table 1:** Possible events over the next six months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
<i>Meher</i> crop producing areas	Heavier and unseasonable rainfall in November and December resulting in a further reduction in <i>Meher</i> production during the harvest and high post-harvest losses	Availability of food declines on markets and at the household level
All	Increased food grain supply to the local markets by the government and partner agencies as interventions to stabilize market prices	Access to food through market purchases improves
South and southeastern parts of the country	Poor October to December <i>Deyr/Hagayya</i> rains	Poor pasture and water replenishment leads to low livestock productivity and poor livestock body conditions
Nationwide	Dramatic increases in international export food prices	Limits the amount of humanitarian support donors are able to provide, decreasing national food availability and decreasing supplies available for nutritional interventions

**ABOUT SCENARIO DEVELOPMENT**

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.