



GIEWS Country Brief Ethiopia

Reference Date: 24-August-2022

FOOD SECURITY SNAPSHOT

- Dire food security situation, with more than 20 million people estimated to be severely food insecure
- Major concern for conflict-affected northern regions and for drought-affected southern areas
- Dismal seasonal rains affecting cereal production of 2022 “Belg” secondary season
- Substantial wheat import requirements, with concerns about the country’s import capacity
- Food prices increasing to very high levels, constraining access to food for large segments of the population
- Severe pasture and water shortages resulting in widespread livestock deaths in southern pastoral areas

Dire food security situation due to multiple shocks

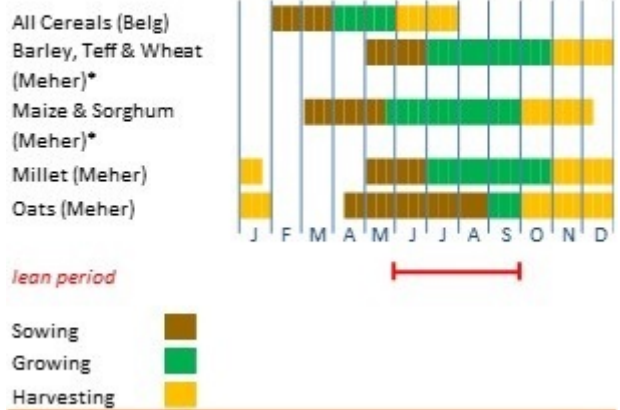
According to the 2022 Humanitarian Response Plan, 20.4 million people are estimated to be severely food insecure, 2.4 million up from last year. The difficult and worsening food security situation is the result of multiple shocks affecting food availability and access:

- The conflict in northern Tigray Region and in adjacent areas of Amhara and Afar regions, which began in November 2020. Despite some improvements of the security situation following the cease-fire signed in late March 2022, economic activities and market functioning have not yet fully recovered. Almost 2.5 million people remain displaced, and in Tigray region alone, 5.3 million people are estimated to be severely food insecure.
- The failure of the 2022 March–May “Gu-Genna” rains in southern pastoral areas of South West Ethiopia Peoples' Region, southern SNNPR, Borena zone in southern Oromiya Region and southern Somali Region, which exacerbated drought conditions prevailing since late 2020, causing severe crop and livestock losses. The drought is affecting more than 8 million people, and in the Somali region alone, the worst affected area, 4.1 million people are estimated to be severely food insecure. As the June–September dry season has recently started and forecasts point to a poor October–December “Deyr/Hageya” season, food security conditions are

Ethiopia

Crop Calendar

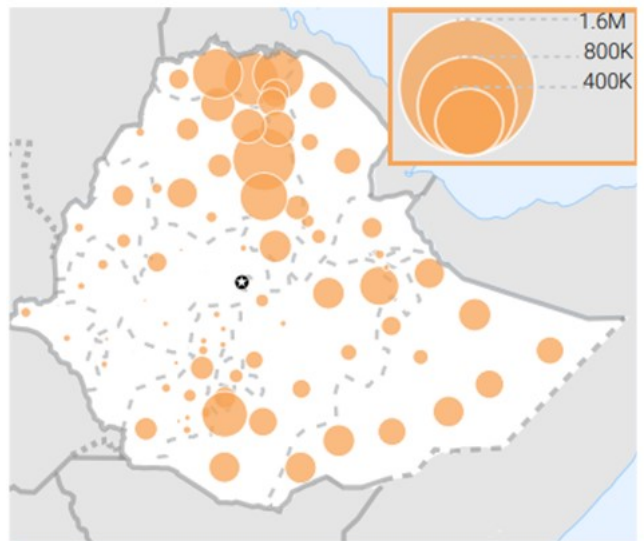
(*major foodcrop)



Source: FAO/GIEWS.

Ethiopia

Geographical distribution of food insecure people, 2022



Source: OCHA.

expected to further deteriorate.

- Severe macroeconomic challenges. They include insufficient foreign currency reserves and the continuous depreciation of the national currency, with the exchange rate vis-à-vis the United States dollar in June being almost 20 percent higher than a year earlier. As a result, inflation is at very high levels, with the year-on-year food inflation rate estimated at 35.5 percent in July, one the highest of the last decade. These difficulties are exacerbated by the ripple effects of the Ukraine war, which triggered hikes in international prices of wheat, fuel and fertilizers.

Dismal seasonal rains affecting 2022 secondary season “Belg” crops

Harvesting of the secondary “Belg” season crops in southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP regions started in July with about one month of delay and production prospects are highly unfavourable. Crop failures are expected in several areas, raising food security concerns for local households that had a poor harvest also last year.

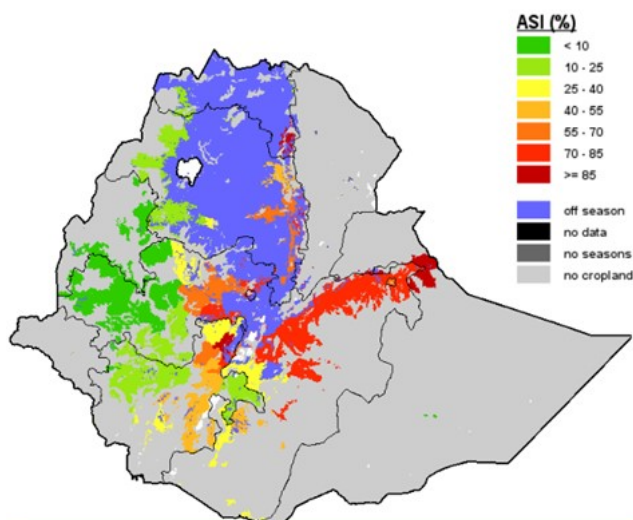
The onset of the rainy season, normally occurring in February, was delayed by 20-40 days. Subsequently, cumulative seasonal rainfall amounts ranged from 20 to 50 percent below average, with an erratic spatial and temporal distribution. In SNNP region, about half of the total seasonal rainfall amounts was received just in the second half of April. According to FAO’s Agricultural Stress Index (ASI), as of late May, immediately before the onset of the dry season, in most cropping areas between 40 and more than 85 percent of cropland was affected by severe drought. In the Southern Zone of the Tigray Region and in adjacent areas of Amhara region, the security situation improved following the cease-fire declared in late March, but by then the planting window was almost closed. According to a multi-agency assessment conducted in Amhara region, as of mid-March less than 40 percent of the planned area was sown due to early-season dryness and insecurity. Overall, in Tigray region and in neighbouring areas of Amhara region, a very poor performance of the “belg” season is expected, with a negative impact on the already dire food security situation.

Planting of the 2022 main “Meher” season crops, for harvest from October, is almost complete in key producing areas of western Oromiya, western Amhara and Benishangul Gumuz regions. Cumulative rains until late July were average to above average in most cropping areas, benefiting sowing and germination. According to the latest forecast by the IGAD Climate Prediction and Applications Centre (ICPAC), average to above-average rainfall amounts are expected in most major cropping areas between August and October.

In Tigray region and in neighbouring areas of Amhara region affected by the conflict, shortages of inputs including seeds, draft oxen and fertilizers have constrained planting operations. However, due to the improved security situation following the ceasefire, higher levels of household engagement in agricultural activities compared to the previous year are reported. As a result, cereal production is expected to be below-average but higher than in 2021.

Ethiopia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, May 2022



Source: FAO/GIEWS Earth Observation System.

Ethiopia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	9 135	10 311	10 722	4.0
Cereals NES	5 335	5 234	5 573	6.5
Wheat	4 978	5 556	5 214	-6.2
Others	8 134	7 219	6 675	-7.5
Total	27 582	28 320	28 184	-0.5

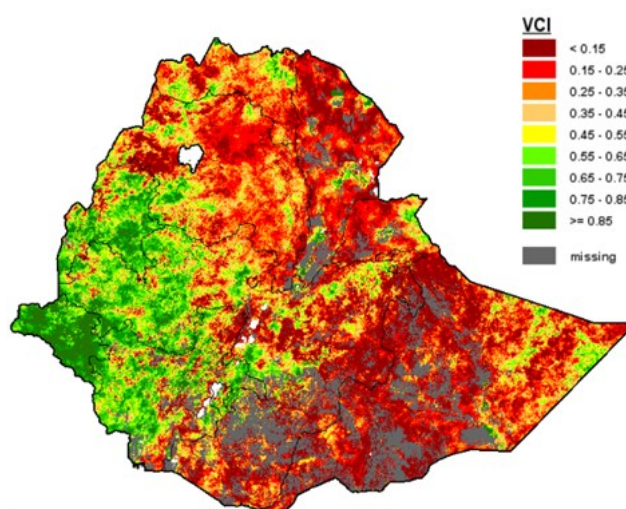
Notes: 1) Percentage change calculated from unrounded data

2) Official production estimates by the Ethiopia Statistics Service from 2020 onwards do not include Tigray region

Source: FAO/GIEWS Country Cereal Balance Sheet

Ethiopia - Vegetation Condition Index (VCI)

June 2022



Source: FAO/GIEWS Earth Observation System.

Substantial wheat import requirements, but there are concerns about the country's import capacity

The most consumed cereals in the country are maize and wheat. While the country is self-sufficient in maize, it imports about 30 percent of its wheat requirements.

About 20 percent of wheat imports in 2021, estimated at about 1.5 million tonnes, were sourced from Ukraine. The impact of the war caused trade bottlenecks and contributed to increases in international prices of wheat, exacerbating the existing macroeconomic challenges affecting the capacity of the country to import.

Food prices at very high levels constraining access to food for large segments of the population

Prices of locally produced maize increased seasonally by 10 to 15 percent between January and June 2022 and reached levels up to 80 percent higher year on year. Prices of wheat declined in the capital Addis Ababa by about 10 percent between April and June but remained at near-record levels and 44 percent higher than a year earlier. The high levels of cereal prices are mainly the result of the continuous depreciation of the national currency, which inflates prices of imported inputs and exacerbates the high oil prices prevailing on the international market.

In drought-affected southeastern pastoral areas, livestock prices increased in recent months as the prolonged drought had a negative impact on the availability of marketable live animals and hence resulted in a low market supply. However, cereal prices increased at faster rates, resulting in a sharp deterioration of the livestock to cereal terms of trade for pastoralists. In Chereti market, located in the Afder zone of Somali Region, the equivalent in maize of a medium sized goat in June was about 50 kg, more than 50 percent below the levels of one year earlier.

Severe pasture and water shortages resulting in widespread livestock deaths

Prolonged drought conditions are significantly affecting southern pastoral areas, where the failure of the March-May "Gu/Genna" rainy season hampered the regeneration of rangeland resources and the recharge of water sources.

Livestock body conditions are currently poor due to lack of pasture and water, and herd sizes have significantly declined due to the death from starvation of about 3.8 million animals and widespread distress sales.

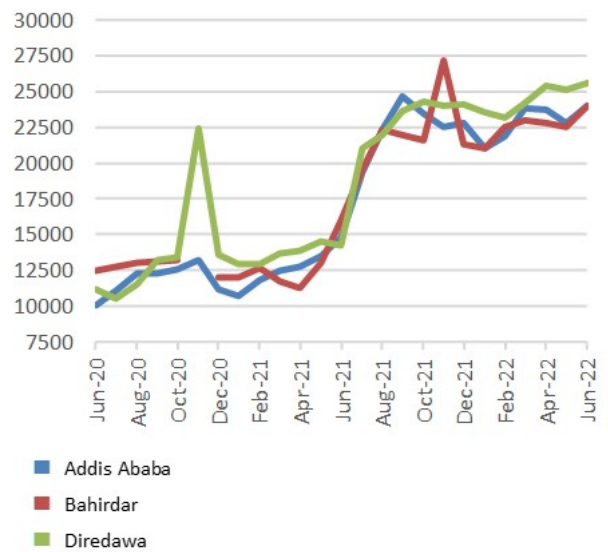
Due to the prolonged drought, most livestock have not conceived in at least the past two seasons, resulting in minimal milk production. The lack of milk, both at household and market levels, is severely affecting food security and nutrition, particularly of children.

In northern pastoral areas of Afar Region and Sitti Zone of northern Somali Region, the performance of the March-June "Diraac/Sugum" rainy season has been among the worst on historical record, severely affecting pasture and water availability and hence livestock body condition, reproduction, and milk availability. Weather forecasts for the "Karan/Karma" rains,

Ethiopia

wholesale prices of maize

Ethiopian birr per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

normally spanning from mid-July to mid-September, point to above-average precipitation amounts. So far, rainfall amounts have been average, and even if the favourable weather forecasts will materialize, a significant improvement in milk availability is not expected, stemming from low conception rates during the previous season and reduced herd sizes due to massive livestock losses caused by the war in Tigray, which spilled over to Afar in July 2021.

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GIEWS Country Brief Ethiopia

Reference Date: 17-June-2021

FOOD SECURITY SNAPSHOT

- Erratic seasonal rains affecting 2021 secondary season “Belg” crops
- Severity of desert locust upsurge declining in recent months
- Erratic precipitation affecting rangelands and livestock in southern and northern pastoral areas
- Alarming food insecurity in Tigray Region due to ongoing conflict, with 5.5 million people requiring food assistance, including 350 000 people facing IPC Phase 5: “Catastrophe” levels of food insecurity
- More than 16 million people estimated to be severely food insecure between May and June 2021

Erratic seasonal rains affecting 2021 secondary season “Belg” crops

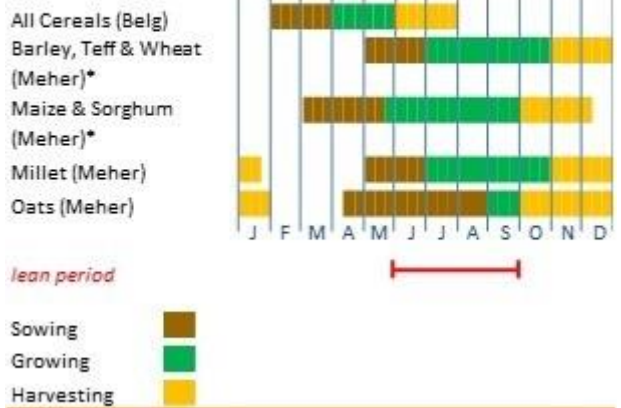
Harvesting of the 2021 secondary “Belg” season crops will start in July with about one month of delay in Southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP regions. Cereal production is expected at below-average levels, as the February-May rainy season has been characterized by an erratic temporal distribution of precipitation over most cropping areas. Cumulative rainfall amounts between February and mid-April ranged from 30 to 80 percent below average in Southern Tigray, eastern Amhara and eastern Oromiya regions, resulting in delayed and reduced plantings as well as in germination failures. In southern Tigray Region, agricultural operations have also been affected by insecurity and input shortages due to market disruptions caused by the ongoing conflict. The substantial rainfall deficits had a negative impact on vegetation conditions and, according to FAO’s Agricultural Stress Index (ASI), as of mid-April, severe drought affected more than 70 percent of the crop land in several areas. Although abundant rains between mid-April and mid-May offset moisture deficits and improved vegetation conditions, the early cessation of seasonal rains in late May did not allow the maturation of late planted and replanted crops.

Planting of the 2021 main “Meher” season crops, for harvest from October, is well underway in key producing areas of western Oromia, western Amhara and Benishangul Gumuz regions. A timely onset of seasonal “Kiremt” rains in early June benefited crop planting and germination. According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-September rains are likely to be favourable,

Ethiopia

Crop Calendar

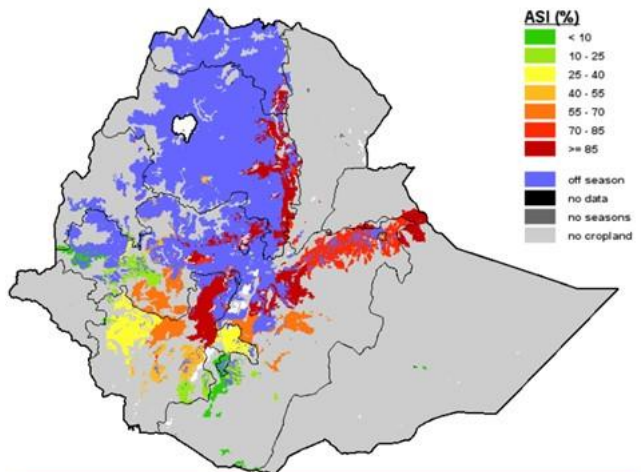
(*major foodcrop)



Source: FAO/GIEWS.

Ethiopia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, April 2021



Source: FAO/GIEWS Earth Observation System.

with average to above-average amounts expected in most major cropping areas. However, the ongoing conflict continues to severely disrupt agricultural operations in western, northwestern, central and eastern zones of Tigray Region.

Severity of desert locust upsurge declining in recent months

Since mid-2019, the country has been affected by a severe desert locust upsurge, the worst in 25 years. Large-scale control operations carried out by the government with the support of FAO are mitigating the impact of the locusts on crops and pastures. Widespread damages have been averted and losses, although significant, occurred only in some localized areas. Infestation levels have been declining since late 2020 as a result of sustained control operations and below-average October-December “Deyr/Hageya” rains that created an adverse environment for insect reproduction.

Abundant “Belg/Gu/Genna” rains in late April and early May allowed the remaining swarms to mature and lay eggs in lowlands of eastern Oromiya and Somali regions. Although current infestation levels are significantly lower compared to one year ago, monitoring and control operations must be maintained to reduce the number of locusts before they form a new generation of swarms from late June onwards, which are expected to move to Afar Region for breeding in August and September, that is expected to coincide with above-normal rains.

Erratic precipitation affecting rangelands and livestock in southern and northern pastoral areas

In pastoral areas of southern SNNP, southern Oromiya and southern Somali regions, rangeland conditions have been affected by below-average rains between October 2020 and mid-April 2021 and, in some areas, by desert locusts, leading to a decline of livestock productivity and conceptions. Although abundant rains between mid-April and mid-May improved rangeland conditions, the increased availability of pasture and water had a limited and short-lived impact in terms of livestock body condition and milk production, also due to the early cessation of seasonal rains in late May. In addition, heavy rains triggered floods in Shabelle, Jarar, Dolo, Afder, Fafan and Korahe zones of Somali Region, which displaced about 56 000 people and resulted in the death of about 7 700 heads of livestock.

In northern pastoral areas of Afar Region and Sitti Zone of northern Somali Region, the March-May “Diraac/Sugum” rainy season has been characterized by an erratic temporal distribution of rains. After severe early and mid-season dryness, abundant rains in late April and early May improved vegetation conditions, but also triggered floods which caused the displacement of about 27 000 people and livestock losses.

Alarming food security situation in Tigray Region due to ongoing conflict

According to the June 2021 Integrated Food Security Phase Classification (IPC) analysis, 5.5 million people in Tigray and neighbouring zones of Amhara and Afar regions (about 60 percent of the population in the analysed area) are estimated to face severe food insecurity (IPC Phase 3: “Crisis” and above) including 350 000 people in “IPC Phase 5: “Catastrophe”, thus

Ethiopia

Cereal Production

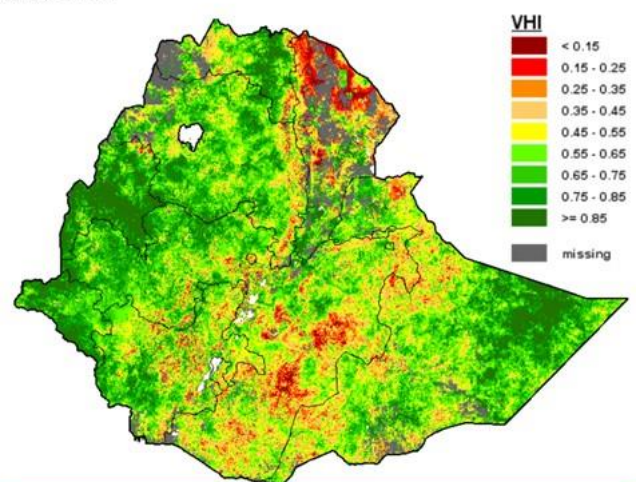
	2015-2019	2019	2020	change
	average		estimate	2020/2019
000 tonnes				
Maize	8 651	9 636	9 200	-4.5
Cereals NES	5 274	5 736	5 500	-4.1
Sorghum	4 995	5 266	5 000	-5.1
Others	8 096	9 036	8 603	-4.8
Total	27 016	29 674	28 303	-4.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Ethiopia - Vegetation Health Index (VHI)

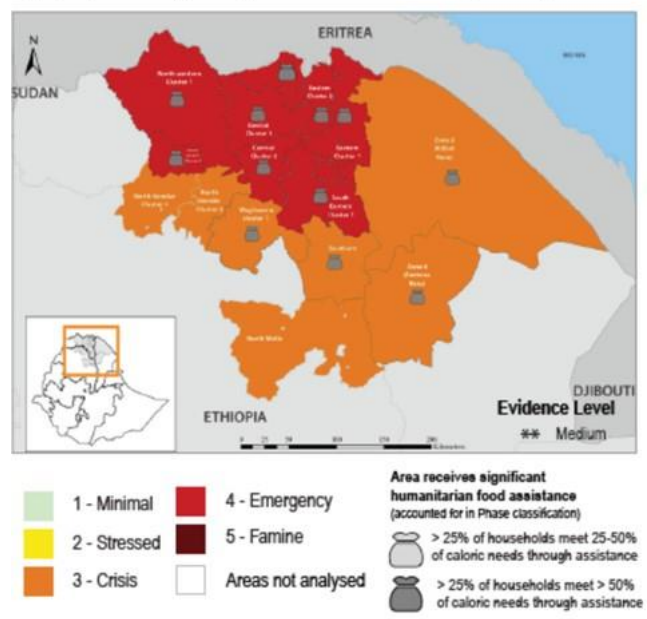
May 2021



Source: FAO/GIEWS Earth Observation System.

Ethiopia – Integrated Food Security Phase Classification (IPC)

Tigray Region and neighbouring zones of Amhara and Afar regions, May-June 2021



urgently requiring Humanitarian Food Assistance (HFA). The IPC updated figures for Tigray Region indicate a sharp increase in the number of people affected by food insecurity, from about 761 000 projected in the October 2020 report for the period January-June 2021 to about 4 million in the May-June period, mainly due to the conflict which erupted in November 2020.

The revised IPC figures show that, in total, more than 16 million people are estimated to face severe food insecurity (IPC Phase 3: “Crisis” and above) between May and June 2021. The high levels of food insecurity are mainly due to the lingering impact of the measures implemented in 2020 to curb the spread of the COVID-19 pandemic, macro-economic challenges resulting in high food prices, localized but significant locust-induced crop and pasture losses, the negative impact on crop and livestock production of erratic rains in the first half of the year and to the intensification of inter-communal violence since 2020 in several areas and the ongoing conflict in Tigray Region.

In particular, in Tigray Region and in neighbouring areas of Amhara and Afar regions, the conflict had a dramatic impact on the local food security situation mainly through:

- Large-scale displacements, with about 2 million people uprooted in northern Ethiopia.
- Movement and access limitations, impairing livelihood activities, market functioning and access to basic services and humanitarian assistance.
- Severe food losses, with an estimated 90 percent of the 2020 “Meher” crops lost through burning and pillaging by armed groups and widespread livestock looting, especially in western and central zones, where pastoralists lost up to 80-90 percent of their animals.
- Losses of income from agricultural, casual and salaried labour, with salaries not paid to most public and private workers since the start of the hostilities.

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GIEWS Country Brief Ethiopia

Reference Date: 20-May-2021

FOOD SECURITY SNAPSHOT

- Erratic seasonal rains affecting 2021 secondary season “Belg” crops
- Severity of desert locust upsurge declining in recent months
- Prices of cereals at high levels
- Abundant rains in late April and early May benefiting rangelands in pastoral areas
- More than 12.9 million people estimated severely food insecure between January and June 2021
- Conflict in Tigray Region resulted in sharp increase of humanitarian needs, with 5.2 million people requiring food assistance

Erratic seasonal rains affecting 2021 secondary season “Belg” crops

Planting of the secondary season 2021 “Belg” crops, for harvest in June/July, is normally concluded in March in southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP regions. The February-May rainy season has been characterized by an erratic temporal distribution of precipitation over most cropping areas. Cumulative rainfall amounts between February and mid-April ranged from 30 to 80 percent below average in southern Tigray, eastern Amhara and eastern Oromiya regions, resulting in delayed and reduced plantings as well as in germination failures. In southern Tigray, planting operations have also been affected by insecurity and input shortages due to market disruptions caused by the ongoing conflict.

Although abundant rains in the second half of April and in early May offset moisture deficits and improved vegetation conditions, several cropping areas are still affected by drought conditions (see Agricultural Stress Index map). In addition, the imminent end of the rainy season, normally occurring in late May, will not allow for the maturation of late planted and replanted crops, and cereal production is expected at below-average levels.

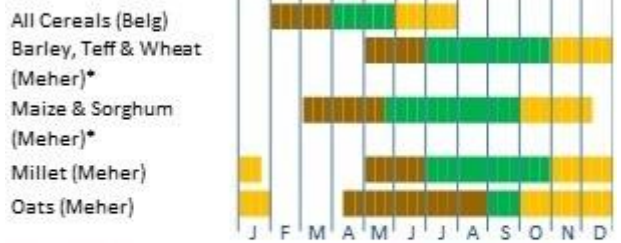
Severity of desert locust upsurge declining in recent months

Since mid-2019, the country has been affected by a severe desert locust upsurge, the worst in 25 years. Large scale control operations carried out by the government with the support of FAO are mitigating the impact of the locusts on crops and pastures. Widespread damages have been averted and losses, although

Ethiopia

Crop Calendar

(*major foodcrop)



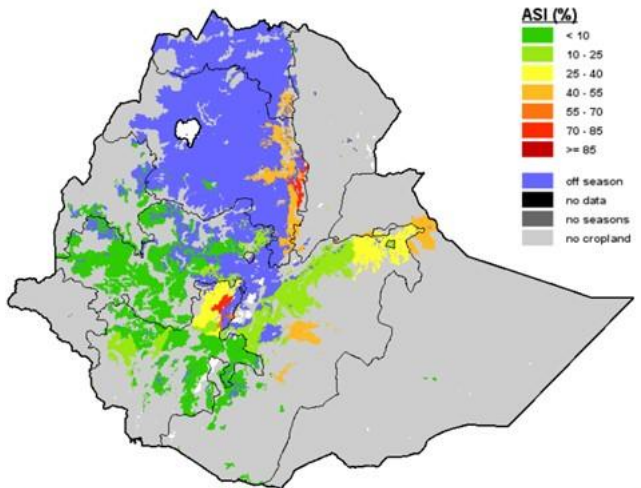
lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Ethiopia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, May 2021



Source: FAO/GIEWS Earth Observation System.

significant, occurred only in some localized areas. Infestation levels have been declining since late 2020 as a result of sustained control operations and below-average October-December “Deyr/Hageya” rains that created an adverse environment for insect reproduction.

Abundant “Belg/Gu/Genna” rains in late April and early May allowed the remaining swarms to mature and lay eggs in lowlands of eastern Oromiya and Somali regions, which could lead to a new generation of swarms from late June onwards. Although current infestation levels are significantly lower compared to one year ago, monitoring and control operations must be maintained.

Abundant rains in late April and early May benefiting rangelands in southern and northern pastoral areas

In the pastoral areas of southern SNNP, southern Oromiya and southern Somali regions, rangeland conditions have been affected by below-average rains between October 2020 and mid-April 2021 and, in some areas, by desert locusts, leading to a decline of livestock productivity and conceptions. Abundant rains in the second half of April and in early May resulted in an improvement of vegetation conditions, which are currently at above-average levels. The increased availability of pasture and water is expected to have a positive impact on livestock in terms of body condition and milk production. However, the recent rains triggered floods in Shabelle, Jarar, Dolo, Afder, Fafan and Korahe zones of Somali Region, which displaced about 56 000 people and resulted in the death of about 7 700 heads of livestock.

In northern pastoral areas of Afar Region and Sitti Zone of northern Somali Region, the March-May “Diraac/Sugum” rainy season has been characterized by an erratic temporal distribution of rains. After severe early and mid-season dryness, abundant rains in late April and early May improved vegetation conditions, but also triggered floods which caused the displacement of about 27 000 people and livestock losses.

Prices of cereals at high levels

In the capital, Addis Ababa, prices of locally produced maize declined by 20 percent between November 2020 and January 2021 as the main “Meher” harvest increased market availabilities. Subsequently, prices increased by 15 percent between January and March 2021 following seasonal patterns. Prices of domestically grown teff, an important cereal in the local diet, after declining by 6 percent between October 2020 and January 2021, increased by 2 percent between January and March 2021. Prices of wheat, partly imported, after having remained mostly stable in late 2020 and early 2021, increased by 18 percent in March. Prices of cereals in March were at high levels, with prices of maize and teff about 25 percent higher than one year earlier and prices of wheat about 45 percent up from their year-earlier values, mainly due to the continuous depreciation of the country’s currency, which has resulted in increased transportation and production costs.

Food security situation in 2021 affected by multiple shocks

According to the October 2020 Integrated Food Security Phase Classification (IPC) analysis, about 12.9 million people are estimated to face severe food insecurity (IPC Phase 3: “Crisis”

Ethiopia

Cereal Production

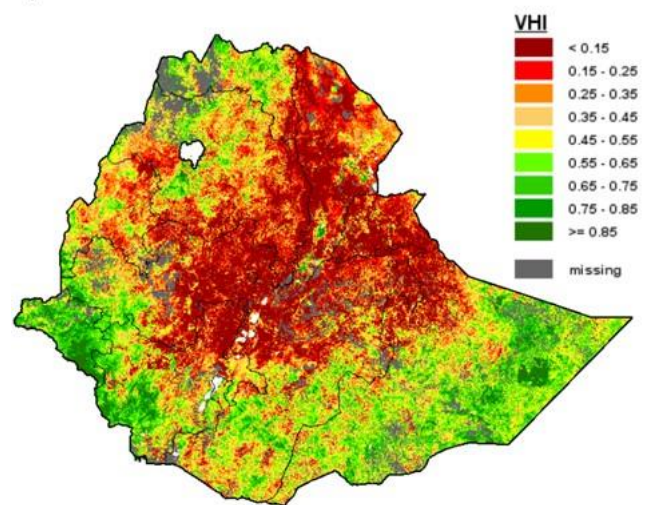
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Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Ethiopia - Vegetation Health Index (VHI)

April 2021

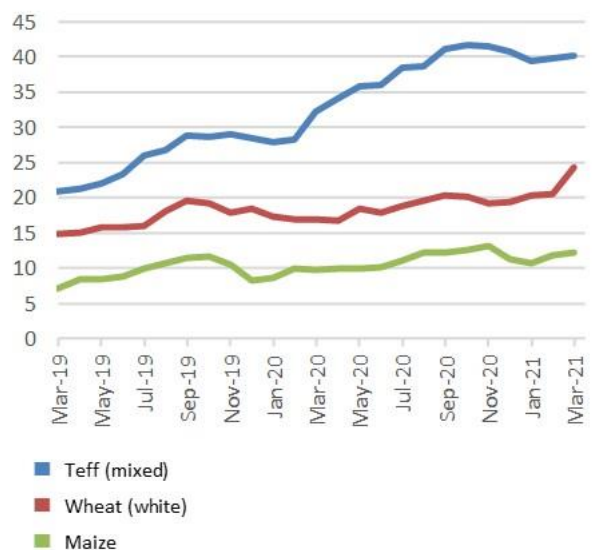


Source: FAO/GIEWS Earth Observation System.

Ethiopia

Wholesale prices of selected cereals in Addis Ababa

Ethiopian Birr per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

and IPC Phase 4: “Emergency”) between January and June 2021. Of these, about 10.3 million people are classified in IPC Phase 3: “Crisis” and about 2.6 million in IPC Phase 4: “Emergency”. The areas most affected by food insecurity are Afar, most of Somali Region, Borena and West Guji zones in eastern Oromiya Region, Segen and South Omo zones in SNNP Region and parts of southeastern Tigray Region, where between 35 and 55 percent of the local population faces severe food insecurity conditions. Humanitarian needs have increased sharply in Tigray Region since the release of the October IPC analysis, as the conflict that erupted in November 2020 resulted in the displacement of 1.7 million individuals, in severe livelihood losses, market disruptions and humanitarian access constraints. According to the Tigray administration, about 5.2 million people currently require food assistance.

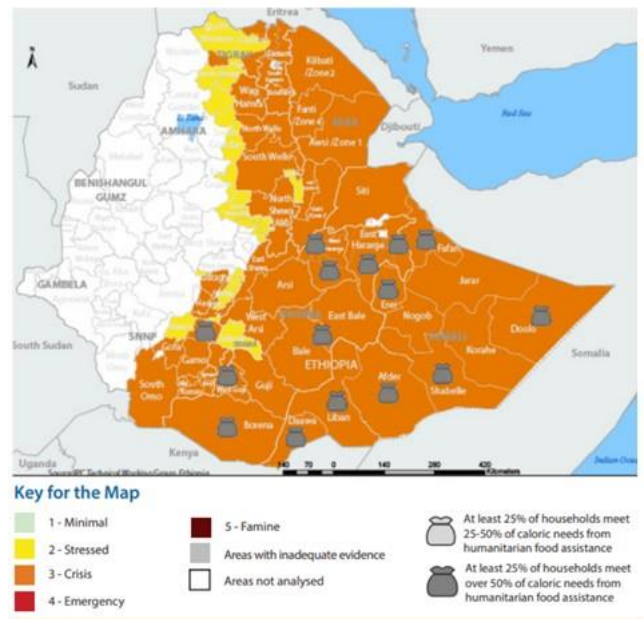
The main drivers of food insecurity include:

- The lingering impact of the measures implemented in 2020 to curb the spread of the COVID-19 pandemic, which resulted in the loss of about 2.4 million jobs. High unemployment rates, coupled with a substantial decline in incomes and remittances, resulted in a marked increase of poverty, with 31 million people estimated to live below the poverty line in 2020, compared to 26 million people in 2019.
- Macro-economic challenges resulting in high inflation rates, increasing costs of food production and transportation, and exerting an upward pressure on consumer prices.
- Localized but significant locust-induced crop and pasture losses.
- The negative impact on crop and livestock reduction of erratic “Belg” rains in central and eastern cropping areas, “Gu/Genna” rains in southern pastoral areas, “Diraac/Sugum” rains in northern pastoral areas.
- The intensification of inter-communal violence since 2020 in Benishangul Gumuz, Oromia, SNNP, Afar and Somali regions, and the conflict in Tigray Region, which resulted in the disruption of livelihood activities and in large scale displacements.

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Ethiopia - Integrated Food Security Phase Classification (IPC)

Projection January-June 2021





GLEWS Country Brief Ethiopia

Reference Date: 22-September-2020

FOOD SECURITY SNAPSHOT

- Severe and prolonged desert locust outbreak affecting rural livelihoods
- Overall favourable prospects for main 2020 “Meher” crops due to abundant seasonal rains
- Crop losses due to floods and locusts, and reduced access to inputs in some areas likely to result in localized “Meher” production shortfalls
- Production of 2020 secondary “Belg” crops estimated at below-average levels due to erratic rains and locust-induced losses
- About 8.5 million people estimated severely food insecure between July and September 2020
- Large segments of population require urgent humanitarian assistance in Somali, Afar and eastern Oromiya regions

Severe and prolonged desert locust outbreak affecting rural livelihoods

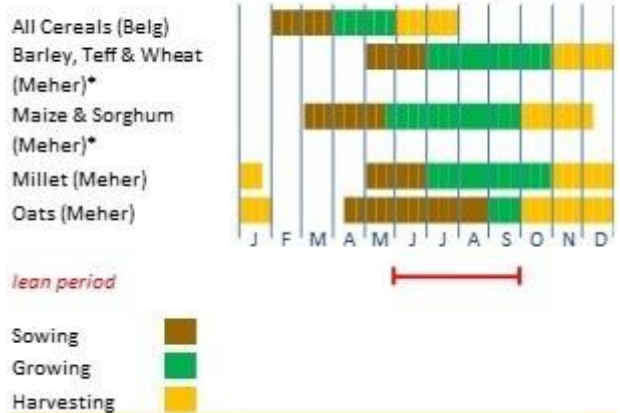
Since mid-2019, the country has been affected by a severe desert locust outbreak, the worst in 25 years. Until early 2020, it mainly affected northeastern and eastern pastoral and agro-pastoral areas in Afar, Somali and eastern Oromiya regions. In March, the outbreak spread to central and southern Oromiya and SNNP regions, affecting “Belg” crops. Abundant March to May “Gu-Genna” rains created a conducive reproduction environment, with the formation of two generations despite sustained control operations, while additional insects reached the country from northern Kenya. In June, the spring-bred locusts migrated to summer breeding areas in the northern highlands of Tigray and northern Amhara regions. Large-scale control operations carried out by the Government with the support of FAO are mitigating the impact of the locusts on crops and pasture. Widespread damages have been averted so far and losses, although localized, have been significant. The “Meher” growing areas located in the northern highlands are likely to become the epicentre of the infestations in East Africa and control operations need to be substantially scaled up to avoid major crop losses.

In late July, FAO launched a [programme](#) to safeguard and restore the livelihoods of pastoral, agro-pastoral and farming communities affected by desert locusts. The programme is assisting over 70 000 households in Afar, Amhara, Somali, SNNP, Tigray and Oromiya regions whose livelihoods have been affected by locusts. Farming communities will receive seeds,

Ethiopia

Crop Calendar

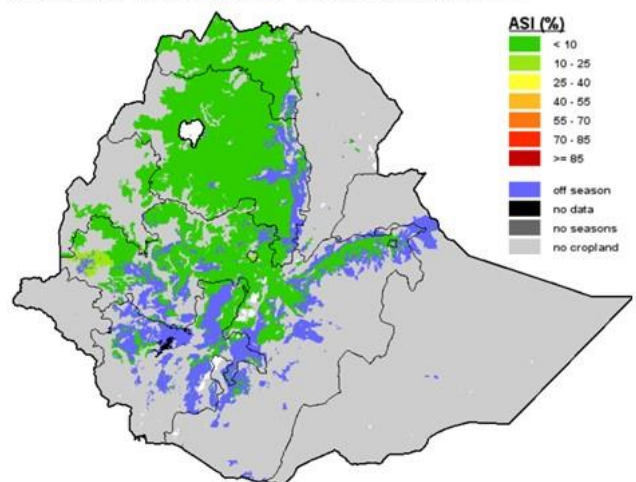
(*major foodcrop)



Source: FAO/GIEWS.

Ethiopia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, August 2020



Source: FAO/GIEWS Earth Observation System.

fertilizers, hand tools and irrigation equipment, while pastoralists and agro-pastoralists will be provided with Multi-Nutrient Blocks to improve livestock body conditions. In addition, FAO will promote forage production and provide the targeted households with unconditional cash transfers to meet their immediate needs and invest in productive activities.

Overall favourable prospects for main 2020 “Meher” crops

Planting of the 2020 main “Meher” season crops, for harvest from October, was completed in June in key producing areas of western Oromiya, Amhara and Benishangul Gumuz regions. An early onset of seasonal “Kiremt” rains, with abundant precipitation amounts received in May in several areas, benefited planting activities and germination as well as the establishment of long cycle crops, including maize, sorghum and millet. Subsequently, rainfall amounts continued at above-average levels for the remainder of the cropping period with cumulative May to September rains estimated in several areas at more than 50 percent above the long-term average. The abundant rains boosted yields but also triggered floods, that affected about 175 000 individuals and resulted in damages to standing crops in some areas. As of late August, according to remote sensing data, vegetation conditions were good across all the “Meher” cropping areas (see ASI map) and cereal production prospects are generally favourable. However, crop losses due to floods and locusts as well as constraints in access to agricultural inputs due to COVID-19-related restrictions in some areas, are expected to result in localized shortfalls in cereal production.

Production of 2020 secondary “Belg” crops below average

The 2020 secondary season “Belg” harvest concluded in August, with about one month of delay. The February to May “Belg” rainy season was characterized by above-average cumulative precipitation amounts, but had an erratic temporal distribution over most “Belg” receiving areas, including eastern Amhara and eastern Oromiya regions. A late onset of seasonal rains in the first dekad of March was followed by adequate precipitation between mid-March and mid-April and by particularly abundant rains for the remainder of the rainy season. The torrential late season rains had a positive impact on vegetation conditions and benefited crop development, but also triggered floods that resulted in localized crop losses. The planted area was below average due to the delayed onset of seasonal rains and access constraints to seed and other agricultural inputs due to COVID-19-related restrictions, while yields were constrained by desert locust induced losses, mainly in SNNP Region. As a result, the cereal “Belg” production is forecast at 10 to 20 percent below average.

Above-average rangeland conditions benefiting livestock despite localized pasture losses due to locusts

In pastoral and agro-pastoral areas of southern SNNP, southern and eastern Oromiya and southern Somali regions, abundant rains during March to May 2020 “Gu/Genna” season resulted in a significant improvement of vegetation conditions, which entered the current “Hagga” dry season at well above-average levels (see ASI map for grassland). However, the heavy “Gu/Genna” rains triggered floods which resulted in the death of about 2 000 heads of livestock.

Ethiopia

Cereal Production

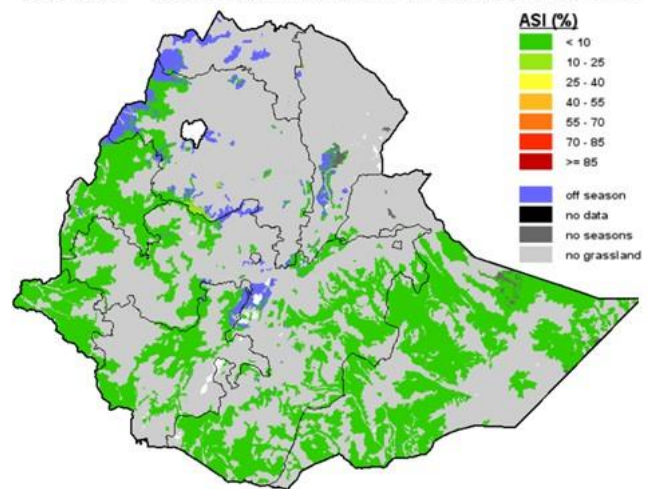
	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	8 171	9 493	9 636	1.5
Cereals NES	5 077	5 403	5 736	6.2
Sorghum	4 810	5 024	5 266	4.8
Others	7 749	7 843	9 035	15.2
Total	25 807	27 763	29 673	6.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Ethiopia - Agricultural Stress Index (ASI)

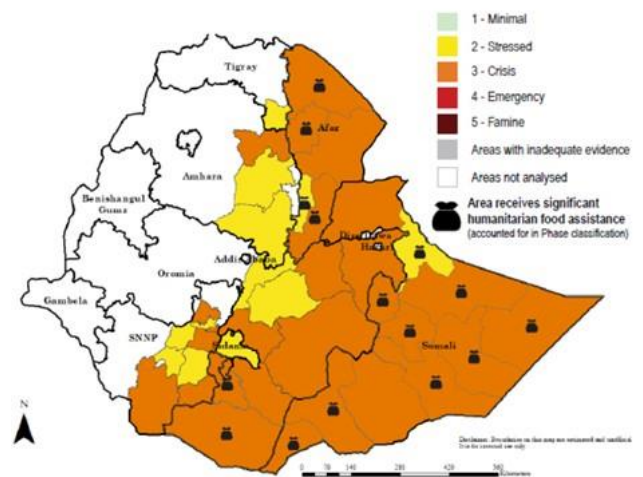
Grassland - From start of season 1 to dekad 3, May 2020



Source: FAO/GIEWS Earth Observation System.

Ethiopia – Integrated Food Security Phase Classification (IPC)

Projection July – September 2020



Animal body conditions are currently at above-average levels due to adequate availability of pasture and water. Herd sizes are gradually increasing, but they are still below average following the massive livestock losses incurred during the 2017 drought. For example, in Afder zone of southern Somali State, herd sizes in June were estimated to be still 30 to 40 percent below average. Milk availability has also increased, but remains below average due to the low number of animals.

In northern pastoral areas of Afar State and Sitti zone of northern Somali State, current pasture conditions are above average following above-average rains during both the March to May “Diraac/Sugum” and the mid-July to mid-September 2020 “Karan/Karma” rainy seasons.

Losses of pasture due to the current desert locust outbreak have been localized as control measures and the regeneration of rangeland resources driven by abundant seasonal rains prevented widespread damages. Substantial damage to pasture mainly occurred in the areas where insecurity hindered control operations.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the October to December “Deyr-Hageya” rains in southeastern areas are likely to be below average, with a negative impact on pastoral livelihoods. In the areas affected by the locust outbreak, the expected dry weather conditions are likely to hinder insect reproduction. However, pasture losses due to adult swarms could still be substantial as the forecast below-average rains will not allow an adequate regeneration of vegetation and, as a result, this could cause increased competition between locusts and grazing animals for the limited resources. Therefore, sustained control efforts are needed.

Food security situation in 2020 affected by multiple shocks

According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 8.5 million people are estimated to face severe food insecurity (IPC Phase 3: “Crisis” and IPC Phase 4: “Emergency”) between July and September 2020. Of these, about 7.1 million people are classified in IPC Phase 3: “Crisis” and about 1.4 million in IPC Phase 4: “Emergency”. The areas most affected by food insecurity are most of southern Somali region, zones 1 and 2 of Afar Region and Bale, Borena, East Hararge, West Hararge, Guji and West Guji woredas in eastern Oromiya Region, where 25 to 45 percent of the population faces food insecurity.

The main drivers of food insecurity include the COVID-19 pandemic, high food prices, the desert locust outbreak, a reduced “Belg” harvest and displacements due to inter-communal violence and weather extremes, with the number of IPDs estimated in August at 1.8 million people. The negative impact of these shocks has been amplified by a reduced household resilience, especially in the drought-prone eastern pastoral and agro-pastoral areas, due to the lingering impact of previous droughts and floods. In particular, the COVID-19 pandemic is affecting the food security situation mainly through:

- Movement restrictions within the country resulting in reduced market availability and exerting upward pressure on food prices, already at high levels prior to the pandemic, mainly

due to the depreciation of the local currency. According to a Food Security Monitoring Survey conducted in July, about 30 percent of the assessed households reported food price increases since the introduction of the restrictive measures.

- Global and domestic economic slowdown causing a sharp decline in incomes and remittances. According to a survey conducted by the World Bank in May, half of the respondents reported a reduction of income and 39 percent a total loss of remittances from abroad.
- Returns of migrants due to reduced economic activity and containment measures in countries with large Ethiopian diaspora in Africa and the Middle East. This returnee inflow resulted in increased humanitarian needs and competition for resources and labour opportunities.
- Reduced exports of livestock and horticulture products.

To mitigate these impacts, FAO has launched the [Revised humanitarian response Coronavirus disease 2019 \(COVID-19\) May-December 2020](#), aiming to assist about 4.3 million beneficiaries with a wide range of actions, including a rapid delivery system for agricultural inputs, distributions of home gardening kits for the production of short cycle crops to the vulnerable households with no access to land, livestock treatment and vaccinations.

COVID-19 and measures adopted by the Government

The Government of Ethiopia introduced, since late February 2020, several precautionary measures in response to the COVID-19 pandemic, and declared, in April 2020, a State of Emergency. The precautionary measures include:

- The obligation for all citizens to wear masks in public and the adoption of social distancing measures.
- The prohibition of gatherings of more than four people unless there is an absolute necessity, in which case permits need to be acquired from relevant authorities.
- The closure of all schools with the exception of higher level learning institutions.
- Work-at-home orders for all Federal and Addis Ababa Government employees.
- The prohibition of sporting activities at all levels.
- The closure of bars and clubs and the prohibition of restaurants to have more than three customers at a table.
- The obligation for all travellers arriving at Addis Ababa International Airport to be tested and undergo a 14-day self-isolation.
- The closure of all land borders, enforced by the army, except for cargo trucks and essential goods.
- The introduction of a road movement limitation scheme banning the circulation of private vehicles with odd or even plate numbers on alternate days.
- The prohibition for taxis and cross-country buses to carry more than 50 percent of their capacity.

While most measures are still currently in place, air and land transportation services with Djibouti have recently resumed.

To mitigate the economic impact of the restrictive measures, especially on the vulnerable households, the Government has scaled up social protection and assistance programmes, and implemented several fiscal and monetary measures, including:

- The provision by the Central Bank, the National Bank of Ethiopia, of ETB 15 billion of additional liquidity to private banks and ETB 33 billion to the Commercial Bank of Ethiopia to facilitate debt restructuring and prevent bankruptcies.
- A COVID-19 Multi-Sectoral Preparedness and Response Plan. Interventions include emergency food distributions to 15 million individuals vulnerable to food insecurity and not currently covered by the rural and urban Productive Safety Net Programme (PSNP).
- Cancellation of all tax debt prior to 2014/15, a tax amnesty on interest and penalties for tax debt pertaining to 2015/16-2018/19, and exemption from income tax for four months for firms who continue to pay employee salaries despite not being able to operate due to COVID-19.
- The prohibition for employers to lay off workers due to business slow-downs.
- The prohibition for property owners to evict tenants and to increase rent rates.
- The introduction of price control measures for staple foods.

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GIEWS Country Brief Ethiopia

Reference Date: 03-December-2019

FOOD SECURITY SNAPSHOT

- Overall favourable prospects for 2019 main “Meher” season crops due to abundant and well-distributed rains
- Unseasonal rains in October and November, and infestations of desert locusts likely to result in localized crop losses
- Reduced output of 2019 secondary “Belg” season harvest due to poor rains, especially in eastern Oromiya Region
- Flood-induced livestock deaths and pasture losses due to locusts curbing drought recovery in most southeastern pastoral areas
- Prices of cereals increased in 2019 to high levels due to production shortfalls and high fuel prices
- According to IPC analysis, estimated number of food insecure people declined from 8 million in July-September to 6.7 million in October-January as main ongoing “Meher” harvest increases food availability
- Major concerns exist for Somali, Afar and eastern Oromiya regions, where large segments of population require urgent humanitarian assistance

Overall favourable prospects for 2019 main “Meher” cereal crop production

Harvesting of the 2019 main “Meher” season crops is well underway and production prospects are generally favourable. In western key-producing areas of Benishangul Gumuz, western Amhara and western Oromiya regions, the June-September “Kiremt” rains were up to 30 percent above average, with a positive impact on yields. According to remote sensing data, vegetation conditions in late September 2019, immediately before the start of the harvesting activities, were generally good in these areas (see ASI map). However, unseasonal heavy rains at harvest time in October and November, coupled with desert locust infestations in eastern Amhara, eastern Oromiya and Tigray regions, are likely to result in localized crop losses. The Government is implementing control measures to contain the locust outbreak.

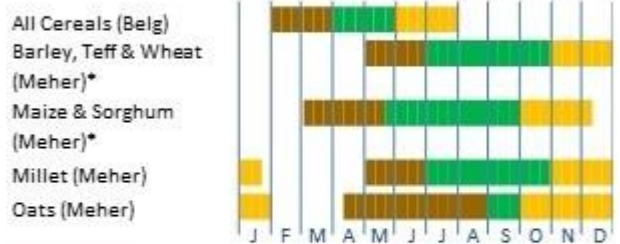
Poor performance of secondary “Belg” season harvest

The secondary “Belg” season harvest was concluded in September in eastern Amhara, eastern Oromiya and

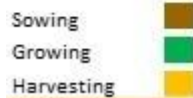
Ethiopia

Crop Calendar

(*major foodcrop)



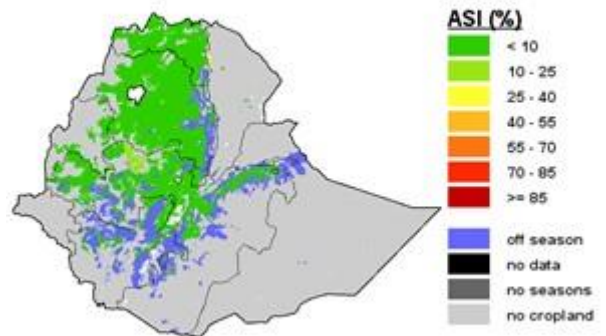
lean period



Source: FAO/GIEWS.

Ethiopia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, September 2019



Source: FAO/GIEWS Earth Observation System.

northeastern SNNP regions, with about a one-month delay. The February-May “Belg” rainy season was characterized by a late onset, an erratic distribution and below-average amounts of rains, with a negative impact on planted area and yields. As a result, the cereal output is estimated at below-average levels, with significant crop production shortfalls recorded in eastern Oromiya Region. In particular, in East and West Harerghe zones, where no significant rains were received until April and seasonal cumulative precipitations were up to 60 percent below average, the cereal output was very poor, with crop failures reported in some areas.

Drought recovery in southeastern pastoral areas curbed by locust infestations and floods

In pastoral and agro-pastoral areas of southern SNNP, southern and eastern Oromiya and southern Somali regions, which experienced severe rainfall deficits during the past two rainy seasons, the October-December 2019 “Deyr-Hageya” rains have been so far exceptionally abundant. The heavy precipitation, more than twice the long-term average in October and November, prompted a substantial regeneration of rangeland resources and resulted in marked improvements of vegetation conditions. The increased pasture and water availability is resulting in improved livestock body conditions and in increased conception rates. However, the heavy rains triggered widespread floods that resulted in localized livestock losses in an increase of the incidence of water-borne animal diseases. In addition, locust infestations are causing substantial pasture losses. These shocks are curbing the recovery process of pastoralists’ livelihoods, which have been severely affected by massive livestock losses during the prolonged 2016/17 drought and the past two poor rainy seasons.

In northern pastoral areas, vegetation conditions are below average in northernmost parts of Afar Region, the Zone 1. Here, the mid-July to mid-September 2019 “Karan/Karma” rains were about 40 percent below average and rangeland resources entered the ongoing dry season with already poor conditions.

Prices of cereals increasing to high levels in 2019

Prices of maize increased by 30-65 percent between January and October in all monitored markets, including the capital, Addis Ababa, as seasonal upward trends were amplified by reduced supplies from the secondary “Belg” harvest. By October, prices were 35-70 percent above their year-earlier levels, also supported by the depreciation of the local currency which resulted in increasing fuel and agricultural input prices inflating transport and production costs. In Mekele market, located in the Tigray Region, maize prices surged by about 20 percent in September, likely due to concerns over the impact of the locust outbreak on the outcome of the “Meher” harvest. Similarly, prices of other cereals, including teff, wheat and white sorghum, increased in the capital, Addis Ababa, by 25-30 percent between January and October, when they were up to 40 percent above their year-earlier levels.

In 2019, prices of livestock increased in the southern Somali Region due to lower supplies following severe animal losses during consecutive poor rainy seasons and, in September 2019, prices of goats in Gode market were about 40 percent higher than one year earlier. However, staple food prices increased at faster rates, with prices of sorghum doubling between September 2018 and September 2019 in Gode market. The

Ethiopia

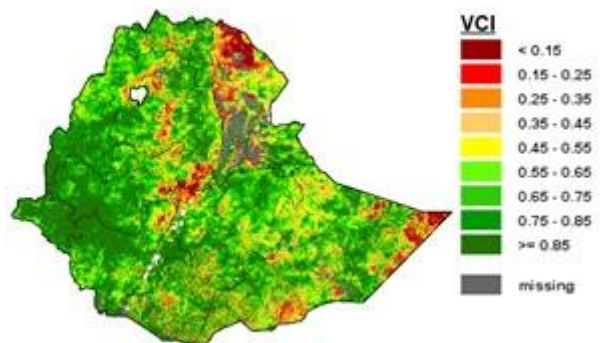
Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	8 171	9 493	9 400	-1.0
Cereals NES	5 077	5 403	5 400	-0.1
Sorghum	4 810	5 024	5 000	-0.5
Others	7 751	7 844	7 760	-1.1
Total	25 809	27 764	27 560	-0.7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Ethiopia - Vegetation Condition Index (VCI)

October 2019

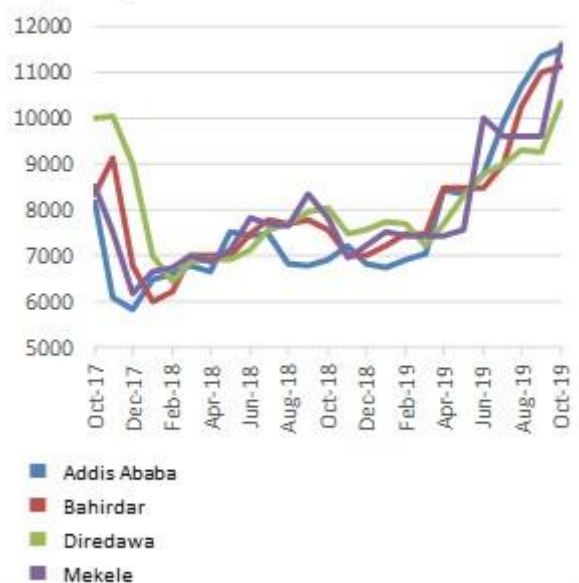


Source: FAO/GIEWS Earth Observation System.

Ethiopia

wholesale prices of maize

Ethiopian Birr per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

ensuing deterioration of terms of trade over the last 12 months indicates severe food access constraints for pastoralists' households, which are also engaged in repopulating their herds and have few animals to sell.

Food security situation seasonally improving in late 2019, but humanitarian needs remain substantial

According to the Integrated Food Security Phase Classification (IPC) analysis, about 8 million people were estimated to face severe food insecurity (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between July and September 2019. Of these, about 6.1 million people were classified in IPC Phase 3: "Crisis" and about 1.9 million people in IPC Phase 4: "Emergency". The areas most affected by food insecurity were located in northern Amhara, northern Afar, southern Tigray, eastern Oromiya and Somali regions. The highest prevalence of food insecurity was recorded in Oromiya and Somali regions, where about 30 and 35 percent of the population, respectively, were estimated to require urgent food and livelihood assistance.

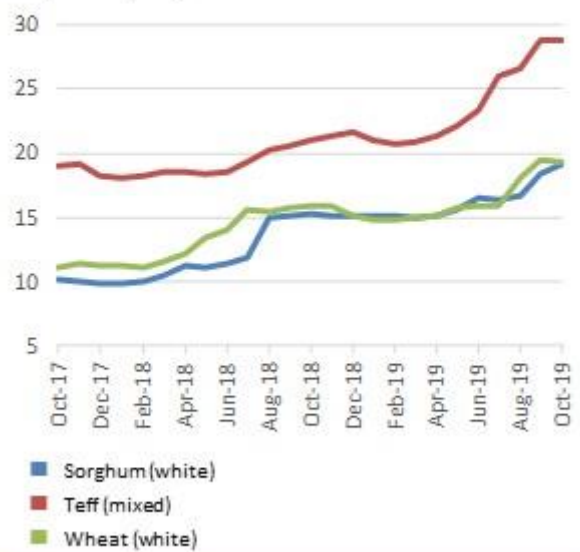
Between October 2019 and January 2020, the number of food insecure people is projected to decline by about 16 percent to 6.7 million, with the "Meher" harvest improving food availability. Marginal improvements are reported in Oromiya Region due to substantial crop production shortfalls of "Belg" crops. In Afar Region, the number of food insecure people is projected to increase by almost 30 percent as seasonal deterioration due to the ongoing dry season is exacerbated by a faster-than-normal depletion of rangeland resources. In the Somali Region, the improvement of the food security situation is in line with the decline of the food insecure caseload at national level, mainly due to the favourable impact of abundant October-December "Deyr" rains on pastoral livelihoods. However, livelihood losses caused by floods and locust infestations curbed the seasonal improvement, and humanitarian needs remain substantial, with 30 percent of the population estimated to require urgent food and livelihood assistance.

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Ethiopia

Wholesale prices of selected cereals in Addis Ababa

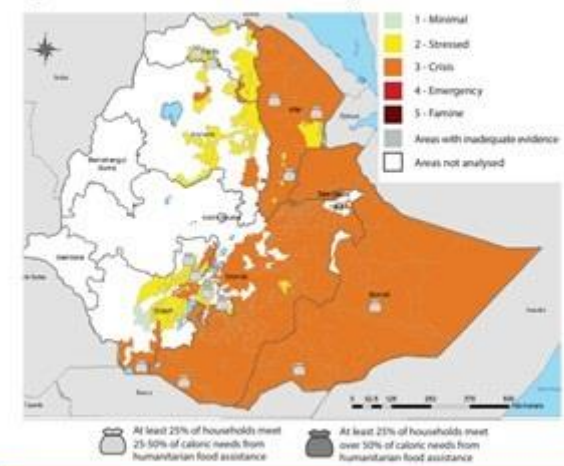
Ethiopian Birr per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Ethiopia - Integrated Food Security Phase Classification

Projection October 2019-January 2020





GIEWS Country Brief Ethiopia

Reference Date: 14-January-2019

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2018 main “meher” season
- Reduced 2018 “belg” secondary season harvest in parts of Tigray and Amhara regions due to erratic rains
- Below-average “deyr” rains curbing drought recovery in southeastern pastoral areas
- Prices of maize declining in recent months and at low levels due to adequate domestic availabilities
- Food insecure caseload estimated at a high 7.95 million
- Major concerns exist for the Somali Region, where large segments of population require urgent humanitarian assistance

Favourable prospects for 2018 main “meher” cereal crop production

Harvest of the 2018 main “meher” season crops is almost complete and prospects are generally favourable. In key producing areas of western Oromia, Amhara and Benishangul Gumuz regions, the initial stages of the June-September 2018 “kiremt” rains were characterized by an early onset in May and by above-average rainfall in June. The abundant rains benefited planting activities and germination as well as the establishment of long-cycle crops, including maize, sorghum and millet. Subsequently, precipitations remained at average to above-average levels, except in some areas of western Oromia Region, where cumulative rains in August and September 2018 were up to 30 percent below average. However, in most of these areas, the rains received were sufficient for cereal grain setting and ripening. According to remote sensing data and information, vegetation conditions in late September 2018, immediately before the start of harvesting activities, were generally good, except in eastern parts of East Wellega zone in western Oromia Region, where the late season rainfall deficits were more severe (see ASI map). Unseasonal rains in October and November 2018 in some areas of Tigray, Amhara and Oromia regions have hindered harvest and storage activities and localized yield reductions are likely.

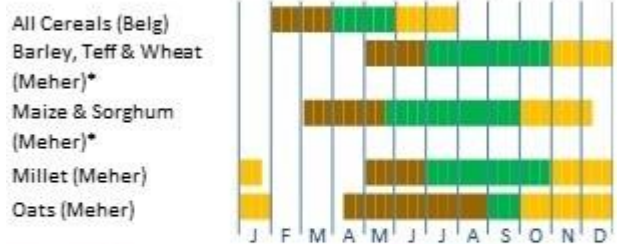
Mixed performance of secondary season “belg” harvest

The minor “belg” harvest was gathered in June-July 2018 and its output was estimated at near-average levels, as the February-to-

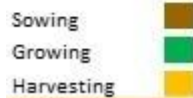
Ethiopia

Crop Calendar

(*major foodcrop)



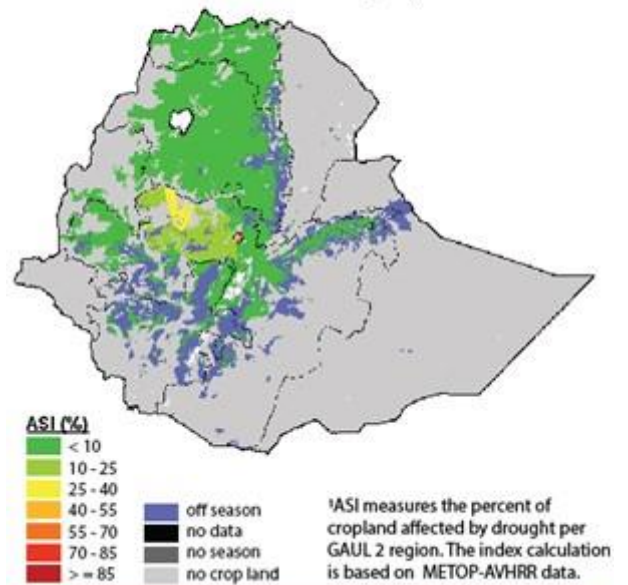
lean period



Source: FAO/GIEWS.

Ethiopia – Agricultural Stress Index (ASI)¹ – Cropland

from start of season 1 to dekad 3, September 2018



Source: FAO/GIEWS Earth Observation System.

May rainy season had a mixed performance. In southern and central areas cropping areas in SNNP, central and eastern Oromia regions, crops benefited from abundant and well-distributed seasonal rains. By contrast, over northern areas in southern Tigray and eastern Amhara regions, crops were affected by erratic rains and planted area and cereal production were respectively reported at about 25 and 50 percent below average.

Below-average “deyr” rains curbing drought recovery in southeastern pastoral areas

In pastoral and agro-pastoral areas of the southern Somali Region, the April-June 2018 “gu” rainy season was characterized by exceptionally abundant precipitations, which offset the moisture deficits accumulated during a severe and prolonged drought between mid-2016 and late 2017 and prompted a substantial regeneration of rangeland resources. The increase in water and pasture availability resulted in a marked improvement in livestock body conditions and allowed animal conception and reproduction. However, as livestock numbers had sharply decreased in 2017 due to drought-induced losses, herds remained below average. Subsequently, the October-December 2018 “deyr” rains were delayed by about two weeks and cumulative precipitations were 15-35 percent below average. As a result, pasture regeneration was only partial and, as of late December 2018, vegetation conditions were below average in several areas of the region, especially in southern parts (see Vegetation Condition Index Map). Coupled with the faster than normal depletion of rangeland resources expected during the incoming January-March dry season, it will curb the recovery of pastoralist livelihoods from the severe drought-induced losses incurred in 2017. Pasture conditions are also below average in northern pastoral areas of Afar Region, where the July-September 2018 “karan/karma” rains had a poor performance.

Prices of cereals declining in recent months

Prices of locally produced maize seasonally increased by 5-15 percent between January and July 2018, levelling off in August as the “belg” season harvest increased supplies. After some increases in September, maize prices declined by 5-15 percent in October and November 2018 with the start of the main “meher” season harvest. Prices of maize in November 2018 were 10-25 percent lower than their year-earlier levels due to adequate domestic availabilities, except in the capital, Addis Ababa, where they were 17 percent higher than 12 months earlier due to sustained local demand. Prices of wheat, partly imported, slightly declined in most monitored markets in November 2018 as newly harvested crops increased supplies, but remained about 40 percent higher than 12 months earlier due to the steady depreciation of the local currency.

In 2018, prices of livestock increased in the southern Somali Region due to generally improved animal body conditions and lower supplies resulting from severe losses during the 2016/17 drought and currently they are at high levels. In Warder market, prices of goats in November 2018 were 23 percent above their year-earlier levels. As a result of increasing livestock prices and generally stable cereal prices, terms of trade for pastoralists improved over the last 12 months. In Warder, the equivalent in maize of one medium-size goat in November 2018 was 25 percent higher than one year earlier. However, these food access gains are largely potential, as herders are engaged in repopulating their herds and have few animals to sell.

Ethiopia

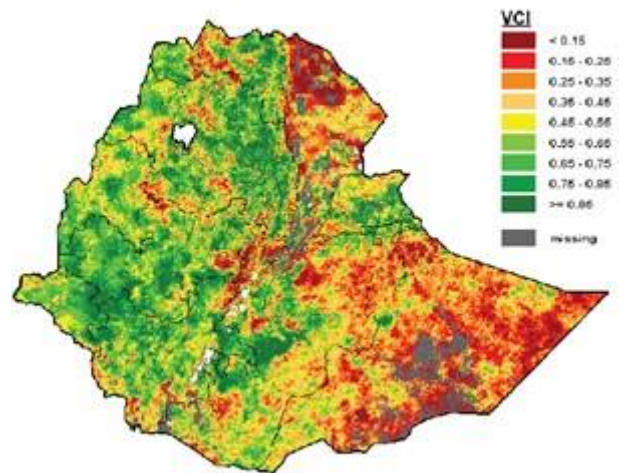
Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017 percent
	000 tonnes			
Maize	7 570	8 396	8 350	-0.5
Cereals NES	4 880	5 283	5 280	-0.1
Sorghum	4 571	5 169	5 150	-0.4
Others	7 549	7 940	7 895	-0.6
Total	24 571	26 788	26 675	-0.4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Ethiopia - Vegetation Condition Index (VCI)

December 2018

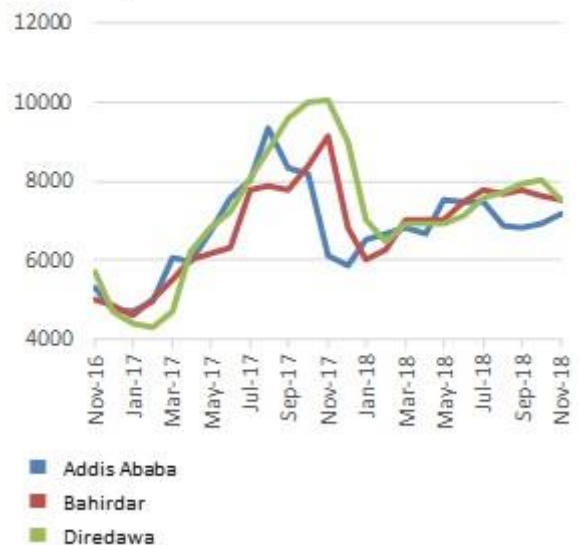


Source: FAO/GIEWS Earth Observation System.

Ethiopia

wholesale prices of maize

Ethiopian Birr per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

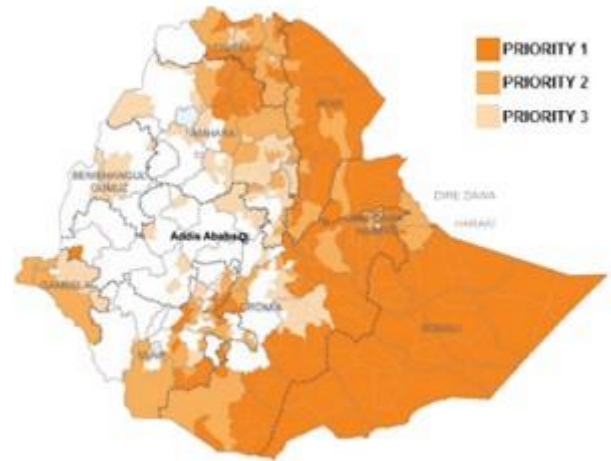
Upsurge in inter-communal violence resulting in displacements and livelihood losses

In mid-2018, the food insecure caseload was estimated at 7.95 million, slightly above the estimate at the beginning of the year and 6 percent below the caseload of one year earlier, at the height of the impact of the 2016/17 drought. Food availability and access in drought-hit southeastern pastoralist areas improved with the abundant March-May 2018 “gu” rains, but an upsurge in inter-communal conflicts in several regions resulted in widespread displacements and livelihood losses. Severe insecurity in Oromia, SNNP, Somali and Benishangul Gumuz regions caused the displacement of 1.44 million people during 2018, bringing the total IDP caseload to 2.4 million. The areas most affected by food insecurity are southern and eastern Oromia, Afar and Somali regions. Major concerns exist for the Somali Region, where the food insecure caseload was estimated in mid-2018 at 1.8 million (more than 30 percent of the region’s population) and, in particular, for its southern parts, where all districts are classified as priority 1 “hotspot woredas”. The main drivers of the severe food insecurity levels are the lingering effects of the 2016/17 drought, which caused massive livestock losses due to deaths and distress sales, and widespread displacements along the Somali-Oromia border, which resulted in livelihood losses and in the disruption of trade flows, affecting cereal supplies from western key-growing areas.

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Ethiopia

Woredas (districts) requiring urgent humanitarian response



Source: Government of Ethiopia, UN Office for the Coordination of Humanitarian Affairs.



GIEWS Country Brief Ethiopia

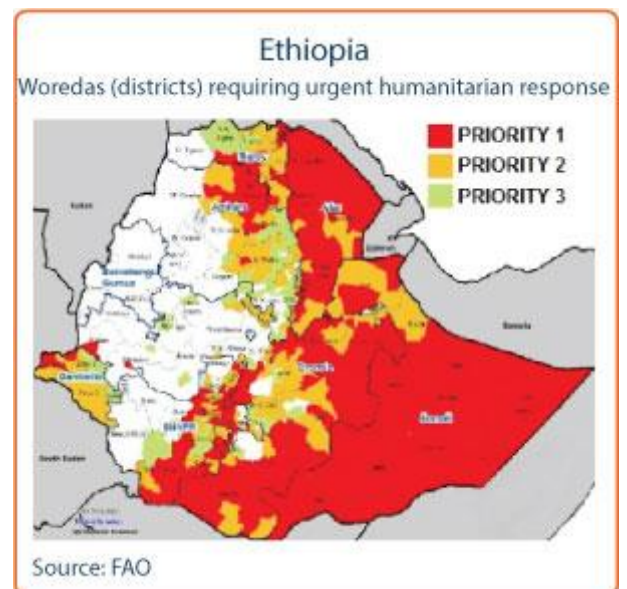
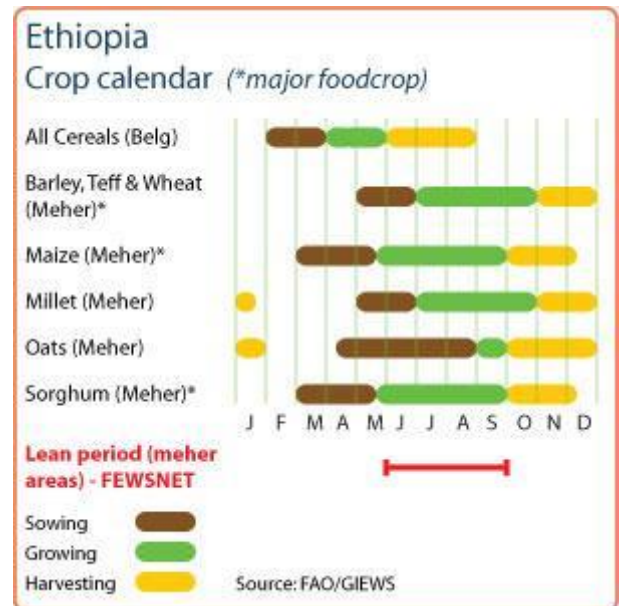
Reference Date: 22-November-2017

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2017 main “meher” season
- Output of 2017 “belg” secondary season harvest estimated at below-average levels due to erratic rainfall
- Fall Armyworm infestations affected crops in 65 percent of country’s districts; Government, with technical and financial support of FAO, undertook appropriate control measures
- Prolonged drought severely affecting livestock conditions in southeastern pastoral areas; current vegetation conditions still very poor despite 2017 October-December “deyr/hageya” rains have been so far erratic but above average
- Prices of cereals at very high levels due to poor performance of “belg” harvest and concerns over impact of Fall Armyworm infestation on main “meher” crop
- Food insecure caseload increased from 5.6 million in December 2016 to 8.5 million in August 2017, mainly due to prolonged drought in southeastern pastoral areas
- Area of major concern is southern Somali Region, where about 2.3 million people estimated to be severely food insecure

Favourable prospects for 2017 main “meher” cereal crop production

Harvest of the 2017 main “meher” season crops is well underway and prospects are generally favourable. In key-producing areas of western Oromia, Amhara and Benishangul Gumuz regions, an early onset of seasonal June-September “kiremt” rains, with abundant precipitation received already in May, benefited planting activities and germination as well as the establishment of long-cycle crops, including maize, sorghum and millet. Subsequently, rainfall continued at above-average levels in most cropping areas over the remainder of the cropping season, with a positive impact on yields. However, lower yields are expected in the lowlands of central and eastern Oromia Region and in SNNPR, where “kiremt” rains had a late onset and an erratic distribution. In addition, a substantial delay of the 2017 “belg” harvest in SNNPR delayed the planting of “meher” crops and, as the period for crop development was shortened, farmers were forced to reduce plantings of long-cycle, high-yielding maize, sorghum and millet.



Earlier in the year, the February-to-May “belg” rainy season was characterized by an erratic distribution and below average amounts over most “belg”-receiving areas in eastern Amhara, eastern Oromia and northeastern SNNPR. A late onset of seasonal rains in the third dekad of March was followed by poor rains in April, up to 70 percent below average, which forced many farmers to re-plant or delay planting until late April. Abundant rains in May had a favourable impact on the establishment of crops, but as the rains tapered off earlier than usual in June, crops were not always able to reach full maturity, with a negative impact on yields. As a result, harvesting of the “belg” crops, normally commencing in June, started in August and production is estimated at below-average levels.

Fall Armyworm infestations, mainly affecting maize and sorghum crops, were initially reported in SNNPR in February 2017, subsequently spreading to the key-growing areas of the western highlands. As of early September, about 550 000 hectares of “meher” season maize crops (about 27 percent of the total planted area) across the country were reported to be infested. The Government, with the technical and financial support of FAO, has undertaken monitoring activities and applied appropriate control measures. As of early September, 43 percent of the infested area was treated with chemicals and 57 percent had been treated culturally through handpicking and killing.

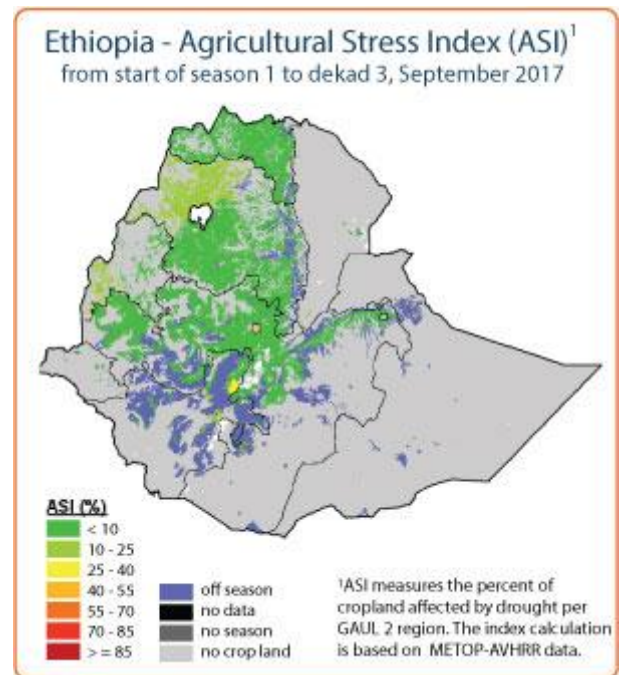
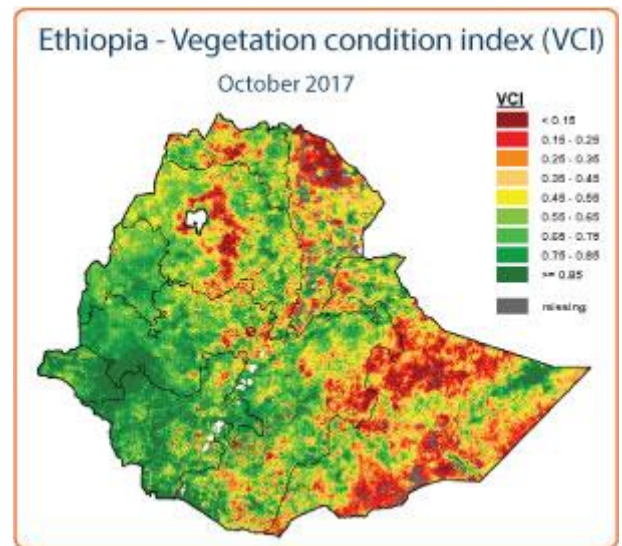
Prolonged drought severely affecting livestock conditions in southeastern pastoral areas

Prolonged drought conditions are severely affecting the livelihoods in most southern and southeastern pastoral and agro-pastoral areas in southern Oromia and southern Somali regions, where pasture, browse and water availability have declined to extremely low levels. Two consecutive failed rainy seasons (2016 “deyr/hageya” and 2017 “gu/genna”) caused critical forage and water deficits which resulted in severe livestock emaciation and mortality rates as well as a sharp decline in milk production. The areas most affected by the prolonged drought are the southern districts of Somali Region (Korahe, Shabelle, Liben, Afder and Dollo zones), where herd sizes were estimated in June to be significantly below average and milk production has virtually ceased.

The 2017, October-December “deyr/hageya” in southern Oromia and southern Somali regions had so far an erratic temporal and spatial distribution, with a delayed onset and scattered coverage, but the cumulative amounts were above average. However, the rains received to date have not yet been sufficient to offset the moisture deficits accumulated over more than one year of dryness and current vegetation conditions are still very poor.

Prices of cereals at very high levels

Prices of maize surged between January and September, doubling on average in all monitored markets and reaching record highs, as seasonal increases were compounded by the poor performance of the “belg” harvest, by concerns over the impact of the Fall Armyworm infestation on the main “meher” crop and by sustained exports to Kenya. Subsequently, prices of maize levelled off or began to decline in October with the start of the “meher” harvest. However, they remained up to 55 percent higher than one year earlier. Prices of teff followed similar patterns, increasing on average by 25 percent between January and September and remaining firm or slightly declining in



Ethiopia				
Cereal production				
	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	6 847	7 200	7 100	-1
Cereals nes	4 391	4 550	4 600	1
Sorghum	4 088	4 350	4 300	-1
Others	6 950	7 315	7 320	0
Total	22 276	23 415	23 320	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

October, when they were 10-25 percent higher than 12 months earlier. Similarly, prices of wheat increased by 46 percent in the capital, Addis Ababa, between January and October, when they were at record levels and 34 percent higher than 12 months earlier.

Severe food insecurity in drought-affected southern Somali Region

The food security situation has sharply deteriorated in 2017 with the estimated number of food insecure people surging from 5.6 million in December 2016 to 8.5 million in August 2017. The number of woredas (districts) requiring urgent humanitarian response was estimated in June 2017 at 461, similar to the high levels of 2016, at the height of the impacts of the El Niño-induced drought. In June 2017, 228 woredas were classified as “priority one”, 20 percent more than in December 2016.

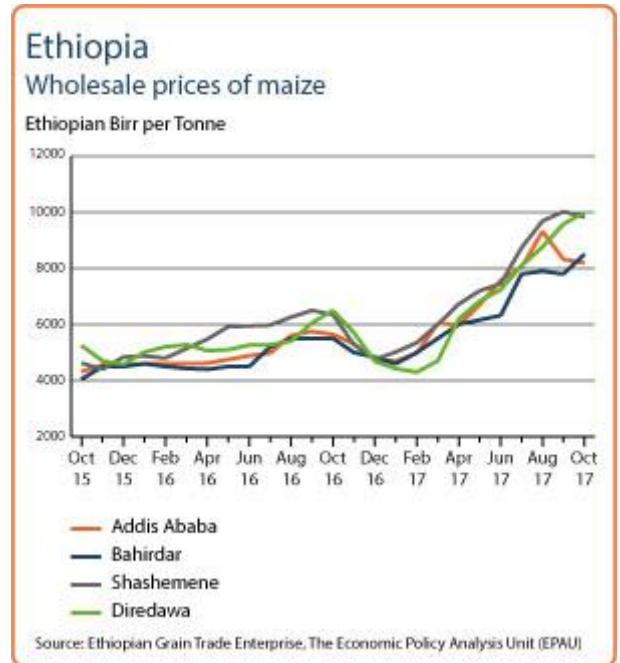
The areas most affected by food insecurity are SNNP, southern and eastern Oromia and southern Somali regions. In these areas, the cumulative impact of the failed October-December 2016 “deyr/hageya” rainy season and a poor performance of the 2017 March-May “gu/genna” rains has critically constrained food availability and access as severe water and fodder shortages have negatively affected crops and livestock. The area of major concern is the Somali Region, where the food insecure caseload was estimated in September at 2.3 million (42 percent of the region’s population), the highest since 2011. In particular, in Dollo, Korahe, Afder and Jarar zones, where the impact of the drought has been most severe, vulnerable households heavily rely on humanitarian assistance and continued food aid distributions are essential to avert extreme levels of food insecurity.

In addition to emergency life-saving assistance, a timely and effective support to the agricultural sector is required to mitigate the extent of the impact of the prolonged drought on pastoralist and agro-pastoralist livelihoods. To respond to the needs of the crisis-hit herders and farmers, FAO aims to assist 1 million households in 2017, appealing for USD 20 million. As of August 2017, USD 7.9 million had been received.

As of August 2017, the achievements of FAO’s activities include:

- The destocking of 22 189 cattle, sheep and goats, increasing the income of 15 274 households and improving the nutritional intake of 43 356 households.
- The provision of animal feed to 46 766 animals belonging to 11 256 households.
- The treatment of 237 734 heads of livestock owned by 26 913 households.
- The rehabilitation of ten water points.

Disclaimer: The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.





GIEWS Country Brief Ethiopia

Reference Date: 07-August-2017

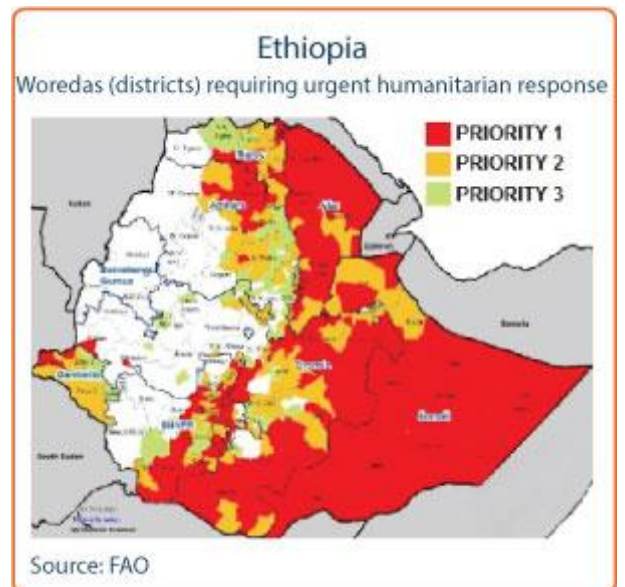
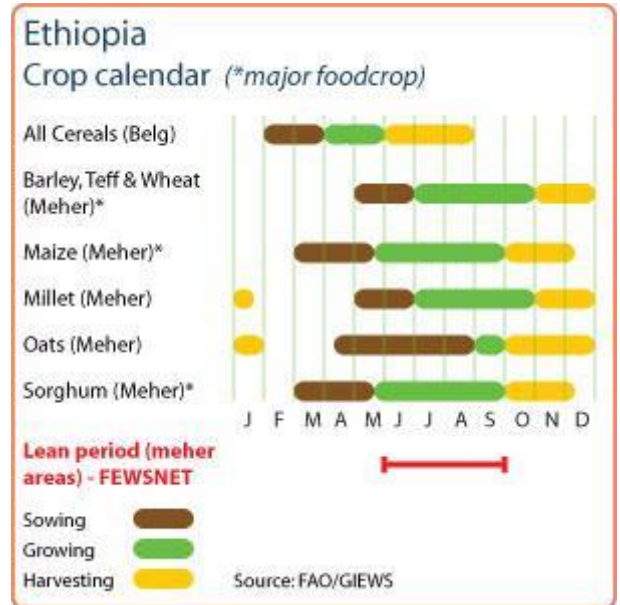
FOOD SECURITY SNAPSHOT

- Food insecure caseload increased from 5.6 million in December 2016 to 7.8 million in May mainly due to prolonged drought in southeastern pastoral areas
- Area of major concern is southern Somali Region, where about 1.8 million people estimated to be facing IPC Phase 4: “Emergency” levels of food insecurity
- Widespread livestock emaciation and high mortality rates in drought-affected southern Somali Region severely constraining food availability and access for pastoralist households
- Favourable weather conditions at start of 2017 “meher” season
- Output of 2017 “belg” expected at below-average levels due to erratic rainfall
- Fall Armyworm infestations affecting crops in about half of country’s districts; Government, with technical and financial support of FAO, undertaking appropriate control measures
- Prices of maize, surging since early 2017, reached new record highs in July

Severe food insecurity in drought-affected southern Somali Region

The food security situation has sharply deteriorated in recent months with the estimated number of food insecure people surging from 5.6 million in December 2016 to 7.8 million in early May 2017. Although the results of the 2017 mid-year review of the Humanitarian Requirements Document are not yet available, the estimated number of people in need of relief food assistance is expected to increase significantly in the second half of 2017. The number of woredas (districts) requiring urgent humanitarian response was estimated in June 2017 at 461, similar to the high levels of 2016, at the height of the impacts of the El Niño-induced drought. In June 2017, 228 woredas were classified as “priority one”, 20 percent more than in December 2016.

The areas most affected by food insecurity are SNNP, southern Oromia and southern Somali regions. In these areas, the cumulative impact of the failed October-December 2016 “deyr/hageya” rainy season and a poor performance of the 2017 March-May “gu/genna” rains has critically constrained food availability and access as severe water and fodder shortages have negatively affected crops and livestock. The area of major



concern is Somali Region, where 2.7 million people are food insecure and about 1.8 million individuals are estimated to be facing IPC Phase 4: “Emergency” levels of food insecurity. In particular, in Dollo, Korahe, Afder and Jarar zones, where the impact of the drought has been most severe, vulnerable households heavily rely on humanitarian assistance and continued food aid distributions are essential to avert extreme levels of food insecurity.

In addition to emergency life-saving assistance, a timely and effective support to the agricultural sector is required to mitigate the extent of the impact of the prolonged drought on pastoralist and agro-pastoralist livelihoods. To respond to the needs of the crisis-hit herders and farmers, FAO aims to assist 1 million households in 2017, appealing for USD 20 million. As of July 2017, USD 6.3 million were funded.

As of May 2017, the achievements of FAO’s activities include:

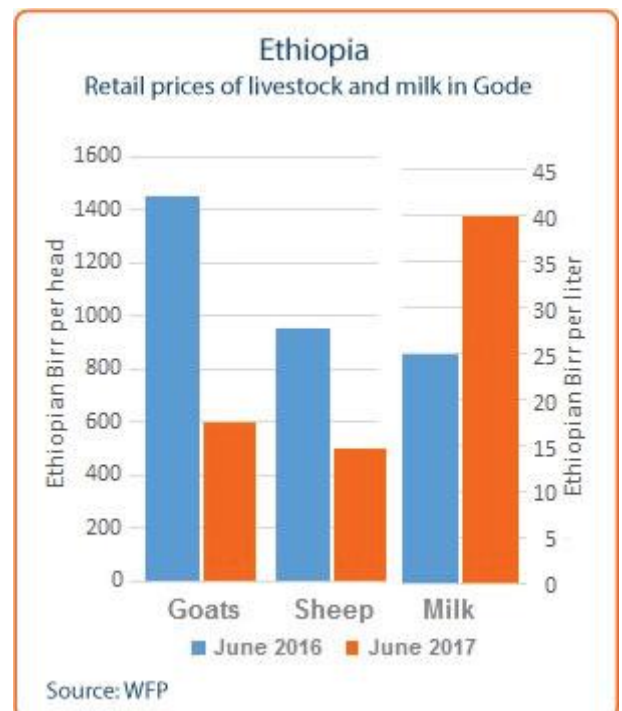
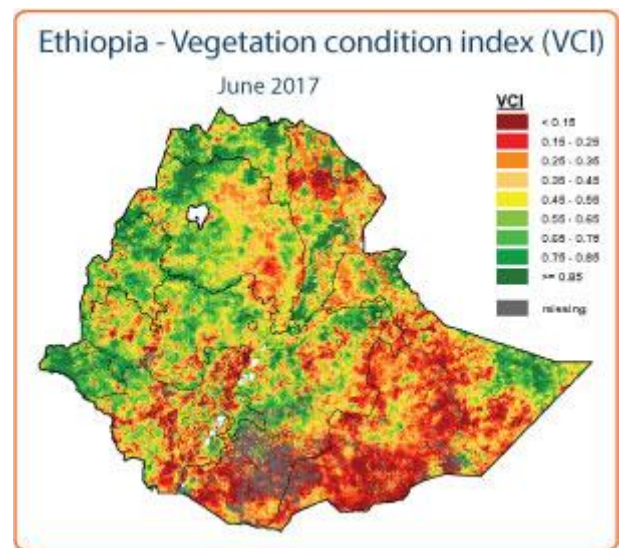
- The destocking of 22 073 cattle, sheep and goats, increasing the income of 15 158 households and improving the nutritional intake of 43 436 households.
- The provision of animal feed to 25 675 animals belonging to 6 075 households.
- The treatment of 119 516 heads of livestock owned by 11 951 households.
- The rehabilitation of ten water points.

Prolonged drought severely affecting livestock conditions in southeastern pastoral areas

Prolonged drought conditions are severely affecting the livelihoods in most southern and southeastern pastoral and agro-pastoral areas of SNNP, southern Oromia and southern Somali regions, where pasture, browse and water availability have declined to extremely low levels. The failure of the 2016 October-December “deyr/hageya” rainy season was followed by a harsh dry season with higher-than-normal land surface temperatures. Subsequently, a poor performance of the 2017 March-May “gu/genna” rainy season has caused a further deterioration of rangeland conditions. The most severe rainfall deficits have been recorded in southern Somali Region, with some areas (Liben, Gode and Korahe zones) having received some rains only in the last dekad of April and in the first dekad of May.

Overall, the cumulative seasonal rainfall in these areas was up to 60 percent below average. Although late season rains had some positive effects on forage and water resources, improvements were short-lived as the rains tapered off from mid-May. Current vegetation conditions are very poor (see Vegetation Condition Index map). As the next rainy season will start only in October, rangeland conditions are expected to further deteriorate in the coming months.

The critical forage and water deficits resulted in severe livestock emaciation and mortality rates and in a sharp decline of milk production. In the areas most affected by the drought, herd sizes are currently estimated to be 70 percent below average and milk production has virtually ceased. In Gode market, located in the Shabelle Zone of southern Somali Region, prices of sheep and goats in June 2017 were 50-60 percent below their year-earlier levels due to poor animal body conditions and distress sales depressing prices. By contrast, milk prices were 60 percent higher than 12 months earlier due to the sharp decline in production. Prices of maize and sorghum in June were 16 and



7 percent lower than their year-earlier levels, respectively, mainly due to food aid distributions. However, the declines of cereal prices were more than offset by the sharp decrease of livestock prices, and terms of trade for pastoralists deteriorated by 40-60 percent between June 2016 and June 2017, indicating severe food access constraints for pastoralist households.

Generally favourable weather conditions at start of 2017 “meher” season

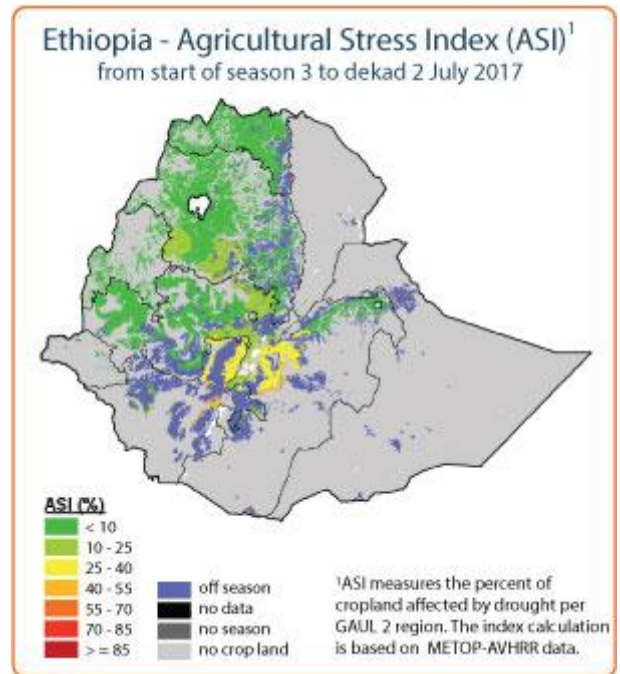
Planting of the 2017 main “meher” season crops, for harvest from October, was completed in June in key-producing areas of western Oromia, Amhara and Benishangul Gumuz regions. An early onset of seasonal “kiremt” rains, with abundant precipitations received in May, benefited planting activities and germination as well as the establishment of long-cycle crops, including maize, sorghum and millet. Subsequently, rainfall continued at above-average levels in most cropping areas in June and July, except in parts of Amhara (East Gojam, South Gonder) and SNNPR (Bench Maj, Kaffa), where the rainfall received in June was below average. Currently, according to remote sensing and analysis, vegetation conditions are good over most “meher” cropping areas (see ASI map). According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-to-September rains are likely to be generally favourable, with average to above-average amounts expected in most major cropping areas.

Earlier in the year, the February-to-May “belg” rainy season was characterized by an erratic distribution over most “belg” receiving areas in eastern Amhara, Eastern Oromia and northeastern SNNPR. A late onset of seasonal rains in the third dekad of March was followed by poor rains in April, up to 70 percent below average, which forced many farmers to re-plant or delay planting until late April. Abundant rains in May had a favourable impact on the establishment of crops, but as the rains tapered off earlier than usual in June, crops were not always able to reach full maturity, with a negative impact on yields. As a result, harvesting of the “belg” crops, normally commencing in June, has just started with about a two-month delay and production is expected at below average levels.

Fall Armyworm infestations, mainly affecting maize and sorghum crops, were initially reported in SNNPR in February 2017, subsequently, spreading to the key-growing areas of the western highlands. The infestation accelerated its expansion in June and July, spreading to the recently-planted “meher” crops. As of late July, 521 000 hectares of maize crops (22 percent of the total planted area) in 389 of the country’s 800 woredas were reported to be infested. Due to the extended and staggered planting seasons in the country, the maize crop is particularly susceptible to Fall Armyworm attacks and all maize growing areas in the country are at risk. The Government, with the technical and financial support of FAO, is undertaking monitoring activities and applying appropriate control measures. As of late July, about 70 percent of the infested area was treated with chemicals or with manual killings.

Prices of maize surging in recent months to record levels

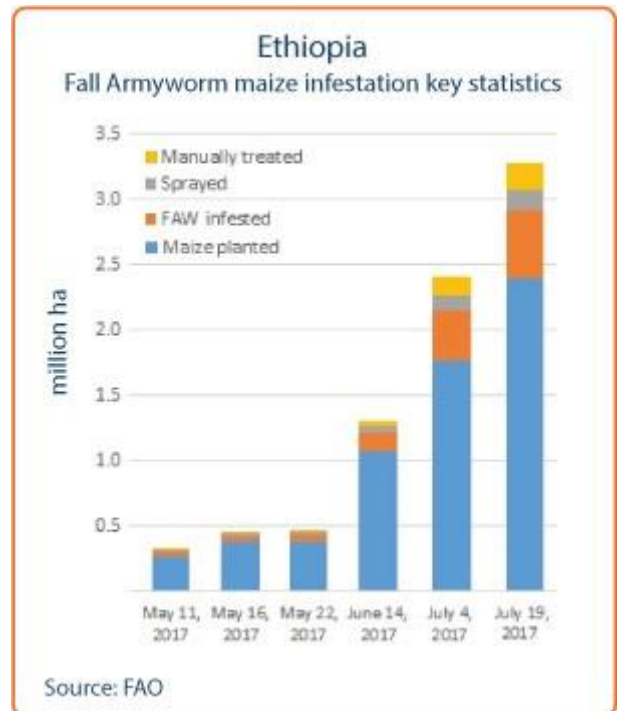
Prices of maize surged in all monitored markets on average by 70 percent between January and July, as seasonal increases were compounded by concerns over the performance of the “belg” harvest and on the impact of the Fall Armyworm infestation



Ethiopia
Cereal production

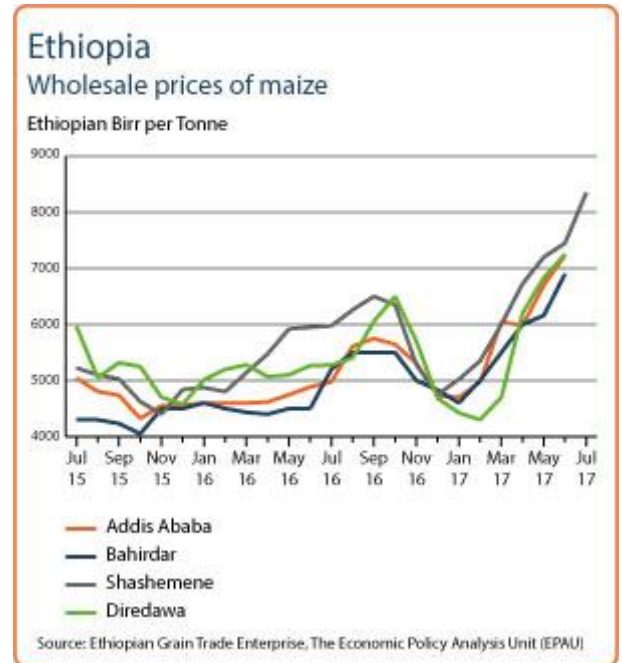
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	6 621	7 151	7 200	1
Cereals nes	4 181	4 471	4 550	2
Sorghum	4 008	4 323	4 350	1
Others	6 547	7 193	7 315	2
Total	21 356	23 138	23 415	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



on the main “meher” crop. The sharpest price spike (83 percent) was recorded in Direedawa market, located in a “belg”-dependent deficit area. In July, prices were up to 75 percent higher than those a year earlier and at record levels in most markets. Prices of teff followed similar patterns but increased at slower rates compared to maize (up to 18 percent over the same period) and, in July, they were up to 20 percent higher than in the same month of the previous year. Similarly, prices of wheat, partly imported, increased by 22 percent in the capital, Addis Ababa, between January and July but remained around their year-earlier levels reflecting adequate imports and a good 2016 output.

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GIEWS Country Brief Ethiopia

Reference Date: 20-June-2017

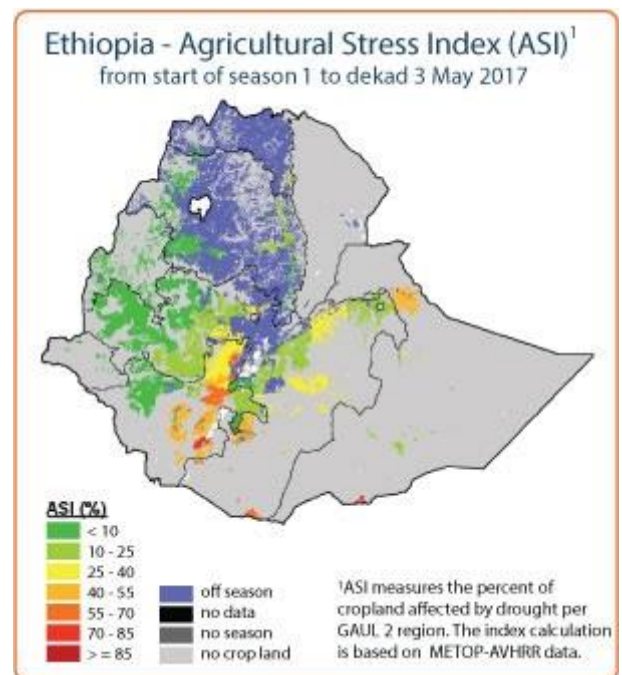
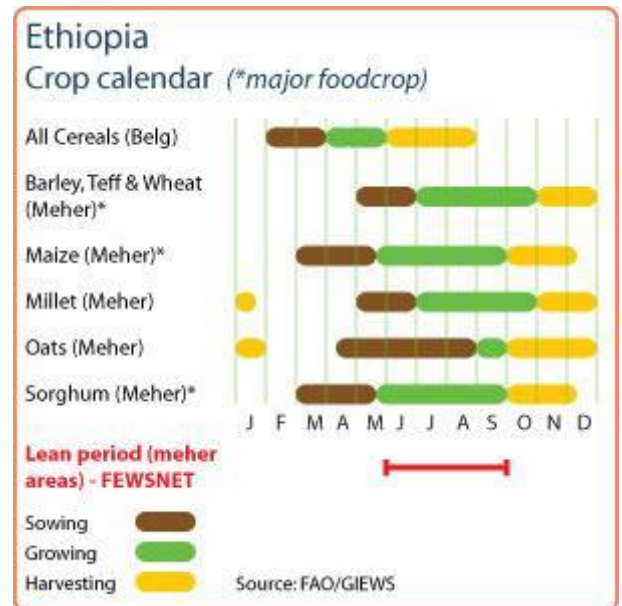
FOOD SECURITY SNAPSHOT

- Above average rainfall in May improves prospects for 2017 “belg” crop production and benefited planting and germination of 2017 “meher” crops
- Prolonged drought severely affecting livestock conditions and productivity in southern pastoral areas
- Cereal prices on the increase and at high levels
- Prices of livestock declining to very low levels in drought-affected southeastern areas due to deteriorating animal body conditions
- Food insecure caseload increased from 5.6 million in December 2016 to 7.8 million in May mainly due to drought in southern pastoral and agro-pastoral areas
- Results of recently completed “belg/gu/genna” season assessment expected to indicate further increase in caseload of people in need of humanitarian assistance for second half of the year

Above average rainfall in May improves prospects for 2017 “belg” crop production

Green harvesting of secondary “belg” season crops has just started and the production outlook is mixed. The February-to-May rainy season had a good performance in the highlands of eastern Amhara and southern Tigray regions. By contrast, in eastern Oromia and eastern SNNPR, a timely onset of seasonal rainfall in February and near-average rainfall amounts in March were followed by poor rains in April. The most severe rainfall deficits were recorded in Wolayita, Gamo Gofa, Gedio and South Omo zones in eastern and southeastern SNNPR, where cumulative rainfall between February and April was up to 33 percent below average. Subsequently, abundant precipitations in May lifted crop prospects in the areas affected by poor rains. Only in some areas of eastern and southeastern SNNPR, the recent improved precipitations were not sufficient to completely offset the severe moisture deficits and poor crop conditions (see red and orange areas in the ASI map).

Planting of the 2017 main “meher” season crops, for harvest from October, is well underway in key-producing areas of western Oromia, Amhara and Benishangul Gumuz regions. An early onset of seasonal “kiremt” rains, with abundant precipitations received in May, benefited planting activities and germination as well as the establishment of long-cycle crops, including maize,



sorghum and millet (see green areas on the ASI map). According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-to-September rains are likely to be generally favourable, with average to above-average amounts expected in most major cropping areas.

Fall armyworm infestations, mainly affecting maize and sorghum crops, have been reported in 233 districts (woredas) of the six major regions of Ethiopia. The Government, with the technical and financial support of FAO, is undertaking monitoring activities and applying appropriate control measures.

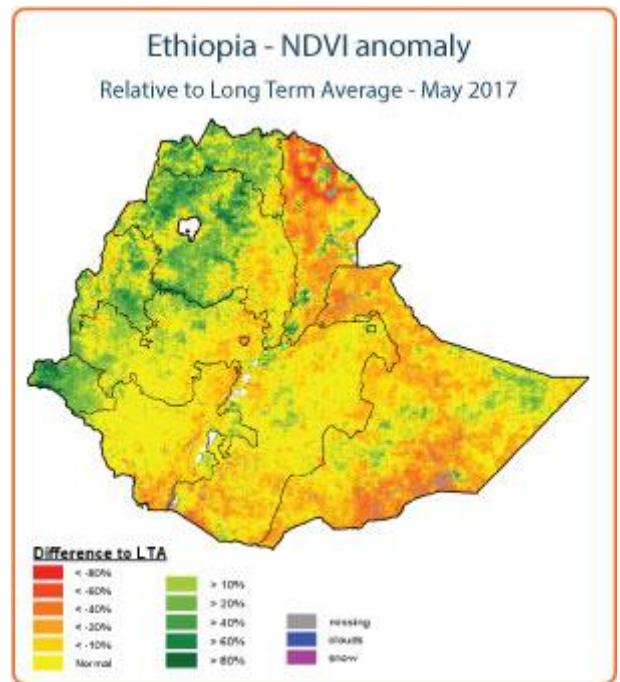
Prolonged drought severely affecting livestock conditions in southern pastoral areas

Prolonged drought conditions are severely affecting pasture, browse and water availability in most southern and southeastern pastoral and agro-pastoral areas of SNNPR, southern Oromia and southern Somali regions. The failure of the 2016 October-December “deyr/hageya” rainy season was followed by a harsh dry season, characterized by higher-than-normal land surface temperatures. Subsequently, a poor performance of the 2017 March-May “gu/genna” rainy season has caused a further deterioration of rangeland conditions to extremely poor levels. In some areas of Southern Somali Region (Liben, Gode and Koraha zones), significant rains were received only in the last dekad of April and in the first dekad of May, and the cumulative seasonal rainfall was up to 60 percent below average. Although late-season rains had a positive impact on forage and water resources, vegetation conditions remain poor (see NDVI anomaly map). In addition, improvements are expected to be short-lived as rains tapered off from mid-May and the dry season already started in June. The severe forage and water deficits resulted in extremely poor livestock body conditions, high animal mortality rates and a sharp decline of milk production. With the next rainy season starting in October, rangeland and livestock conditions are expected to further deteriorate in the coming months.

In northern pastoral areas of Afar Region and in Sitti Zone in northern Somali Region, the March-May “diraac/sugum” rains had an erratic temporal distribution, with a prolonged dry spell in April which had a negative impact on rangeland conditions (see NDVI anomaly map). However, pasture availability is set to improve in the coming weeks due to the abundant rains received in May. According to the latest GHACOF weather forecast, the July-to-September “karan/karma” rains are likely to be near average over Northern Somali Region, but below average in Afar Region.

Prices of cereals on the increase and at high levels

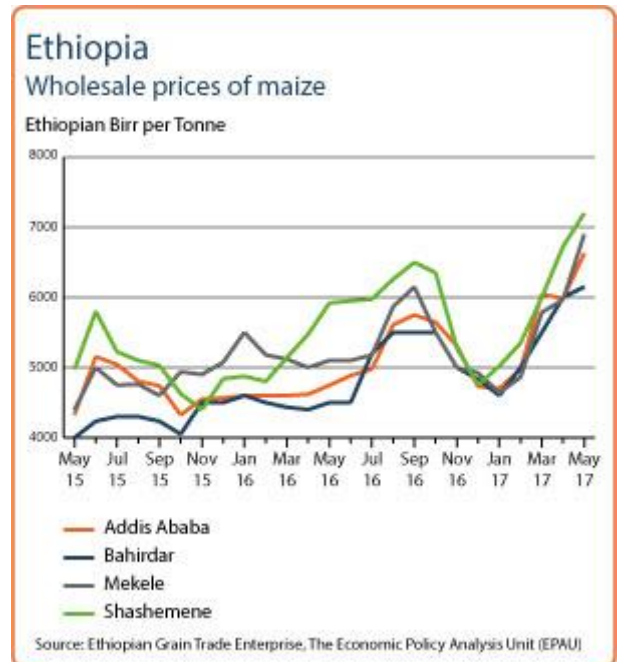
Prices of maize surged in all monitored markets by 20-45 percent between February and April as seasonal increases were compounded by concerns over the performance of the upcoming “belg” harvest. The sharpest price spike was recorded in Diredawa market, located in a “belg”-dependent deficit area. In May, prices continued to increase but at slower rates as crop prospects improved due to recent abundant precipitations. Prices in May were up to 63 percent higher than those a year earlier. Prices of teff followed similar patterns, increasing by up to 25 percent between January and May, when they were up to 30 percent higher than in the same month of the previous year. Similarly, prices of wheat, partly imported, increased by 18 percent in the same period, but remained slightly below their



Ethiopia
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	6 621	7 151	7 200	1
Cereals nes	4 181	4 471	4 550	2
Sorghum	4 008	4 323	4 350	1
Others	6 547	7 193	7 315	2
Total	21 356	23 138	23 415	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



year-earlier levels reflecting adequate imports and a good 2016 output.

In drought-affected southeastern areas, prices of livestock have declined to very low levels as animal body conditions have substantially deteriorated and pastoralists have been forced to reduce their herd sizes. In Warder market, located in Dollo zone in Southeastern Somali Region, prices of shoats declined by 20 percent between February and March when they were about 50 percent lower than in March 2016.

Food security deteriorated in drought-affected southern areas, urgent livelihood support required

The food security situation has deteriorated in recent months, with the estimated number of food insecure people increasing from 5.6 million in December 2016 to 7.8 million in early May 2017. The areas most affected by food insecurity are SNNPR, southern Oromia and southern Somali regions. In these areas, the cumulative impact of the failed October-December 2016 “deyr/hageya” rainy season and the poor performance of the 2017 March-May “gu/genna” severely constrained food availability and access where severe water and fodder shortages have negatively impacted crops and livestock. Food availability was further constrained by localized 2016 “meher” production shortfalls in parts of Oromia (Borena, East Hararge, Guji, West Guji and Bale zones) and SNNP (South Omo zone) regions due to erratic and below average rainfall and low temperatures leading to frost damage to crops.

A timely and effective support to the agricultural sector is required to mitigate the extent of the impact of the prolonged drought on pastoralist and agro-pastoralist livelihoods. To respond to the needs of the crisis-hit herders and farmers, FAO aims to assist 1 million households in 2017, appealing for USD 20 million. As of May 2017, USD 5.6 million (28 percent of the requirement) were funded.

Ethiopia is among the largest refugee-hosting countries in Africa, with about 840 000 registered refugees and asylum seekers estimated in late May, mainly originating from South Sudan, Somalia and Eritrea. Financial constraints have seriously limited the level of humanitarian assistance so far and the environmental degradation in camps, the fragile eco-system and the scarcity of resources have led to tensions between host communities and refugees in some locations.



GIEWS Country Brief Ethiopia

Reference Date: 22-November-2016

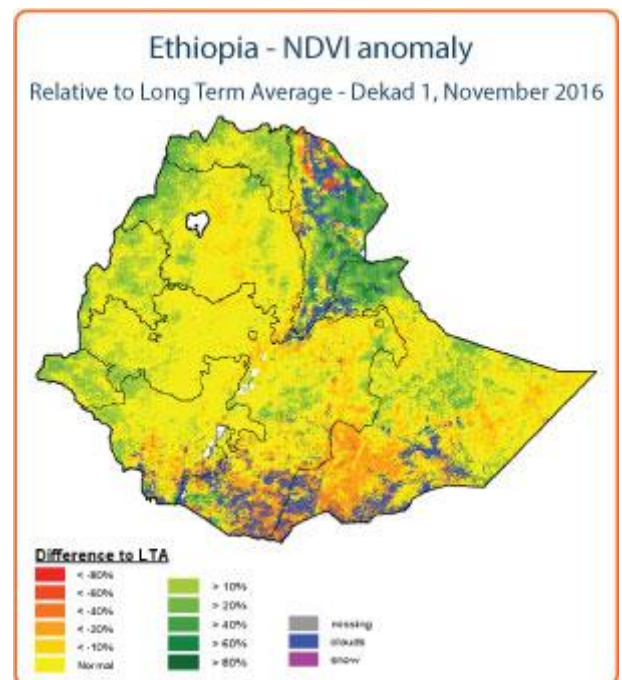
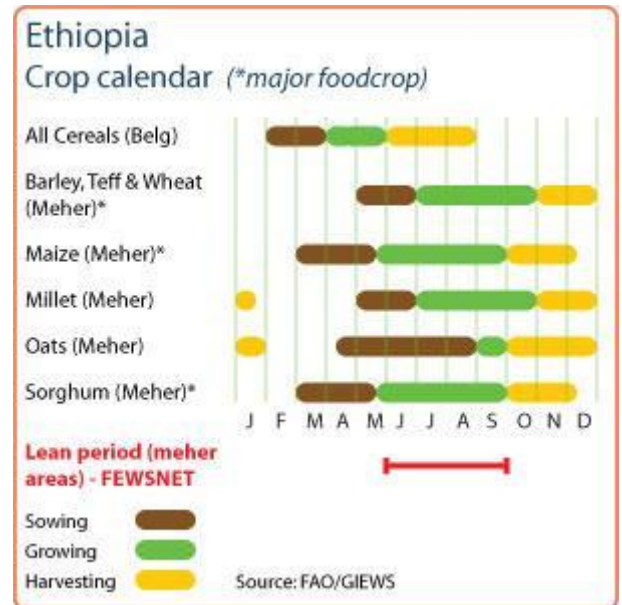
FOOD SECURITY SNAPSHOT

- Favourable prospects for 2016 main “meher” season crops
- Below-average pasture conditions in southern and southeastern pastoral areas
- Given the starting of the main harvest, cereal prices stabilized or declined though at high levels
- General food security conditions improving with newly-harvested “meher” crops available for consumption
- High levels of food insecurity persist in pastoral areas affected by 2015 El Niño-induced drought as pastoral recovery takes much longer time than a couple of good seasons

Favourable prospects for 2016 main “meher” cereal crop production

Harvesting of the 2016 main “meher” season cereal crops has recently started in lowland areas. Overall, crop prospects are above average as the June to September “kiremt” rains started on time and have been favourable across the country. However, lower yields are expected in lowlands of central and eastern Oromia Region and in SNNPR along the Rift Valley, where “kiremt” rains had a late onset, below-average amounts and erratic distribution. In SNNPR, the substantial delay of the 2016 “belg” harvest delayed the planting of “meher” crops and, as the period for crop development was shortened, farmers were forced to plant short-cycle and low-yielding crops, such as some varieties of wheat, teff and legumes, instead of maize and sorghum. In localized highland areas of Amhara, Tigray and Oromia regions, torrential rains triggered floods and waterlogging, with negative effects on crop development.

Harvesting of the secondary “belg” season crops was concluded in early September. Yields in southern Tigray, eastern Oromia and eastern Amhara regions have been affected by inadequate soil moisture both at the beginning and at the end of the season. Excessive rainfall in April/May caused localized water logging and flooding with ensuing damage to standing crops. By contrast, yields were higher in SNNPR and central Oromia regions, where average to above-average cumulative rainfall was received in April and May, offsetting the impact of early season dryness. As a result, the 2016 “belg” cereal production is estimated at about



1.5 million tonnes, slightly below average, but well above the 2015 drought-affected output of only 760 000 tonnes.

Below-average pasture conditions in southern and southeastern pastoral areas

In southern and southeastern pastoral areas, the October-to-December rainy season has been very poor so far. The onset of the rains has been late by over one month and cumulative rainfall amounts have been minimal, especially in southern Oromia (Borena and Guji zones) and Southern zones of Somali Region. Grazing resources have deteriorated significantly due to the impact of dry weather conditions since mid-May, with negative consequences on livestock body conditions and milk productivity. By contrast, pasture and water availability have improved in most of Afar Region and in Sitti Zone in northern Somali Region, following two consecutive seasons of favourable rains (see NDVI anomaly map). However, although livestock body conditions and productivity are gradually improving, livestock herd sizes in these areas are still well below-average levels due to low birth rates and massive deaths which occurred in 2015 as a consequence of the El Niño-induced drought. Given massive livestock deaths last year, recovery may require three to four good consecutive seasons.

Prices of most cereals at high levels

Prices of maize increased by 6-19 percent between July and September, as heavy rains and floods caused crop losses and disrupted marketing operations in some areas. Subsequently, prices declined or levelled off in October in several markets, including the capital, Addis Ababa, with the beginning of the 2016 “meher” main season harvest. By contrast, prices continued to increase in Diredawa market, located in traditionally deficit area. October prices, compared with their levels of 12 months earlier, were about 30 percent higher in the capital, Addis Ababa, and up to 35 percent higher in the other monitored markets. In Addis Ababa, prices of white sorghum and teff in October were both about 25 percent higher compared to same time last year. By contrast, prices of wheat, partly imported, have declined by 15 percent compared to October last year as the upward pressure on prices exerted by tight domestic availabilities was offset by sustained imports and declining international prices.

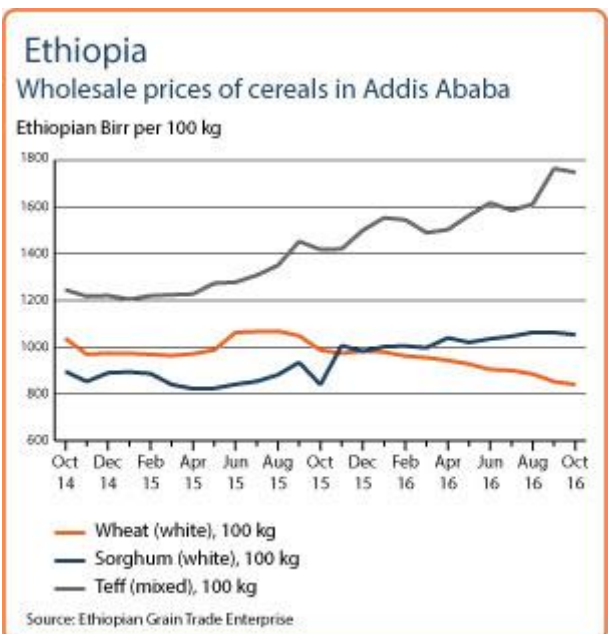
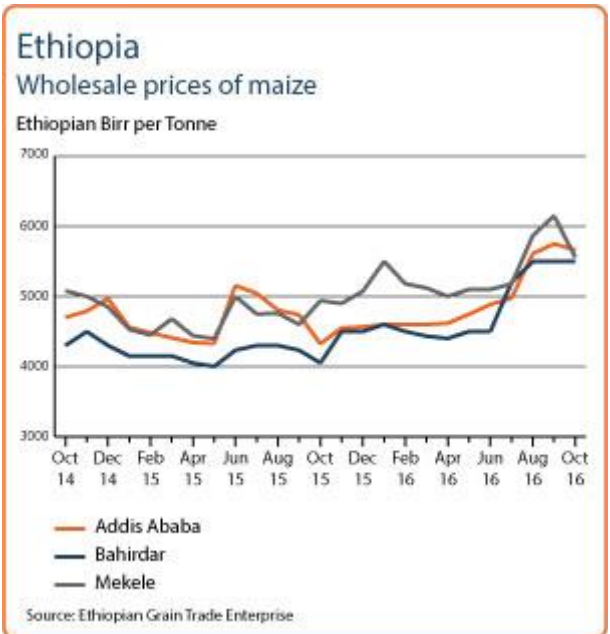
Prices of other food products are also higher than 12 months earlier. In October 2016, the year-on-year rate of inflation was 9 percent for meat, milk, cheese and eggs, and fruits. At regional level, the highest rates of food inflation were recorded in Diredawa (9.2 percent), Afar (9.4 percent) and Tigray (16 percent) regions, due to the upward pressure exerted on prices by the lingering effects of the 2015 drought and by the reduced secondary “belg” season harvest.

Food insecurity levels remain high in most regions affected by the 2015 El Niño induced drought

As a result of the impact of the 2015 drought on last year’s “belg” and “meher” crop productions as well as on grazing resources in northern areas of the country, food security conditions have sharply deteriorated since mid-2015, with the estimated number of food insecure people increasing from 4.5 million in August to 10.2 million during the first semester of 2016. According to the

Ethiopia				
Cereal production				
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	6 621	7 151	7 200	1
Cereals nes	4 181	4 471	4 550	2
Sorghum	4 008	4 323	4 350	1
Others	6 547	7 193	7 295	1
Total	21 356	23 138	23 395	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



August 2016 revision of the Humanitarian Requirements Document, following the start of the “belg” harvest, the number of people in need of assistance has been revised downward to 9.7 million. At the same time, the number of hotspot priority woredas slightly decreased from 429 to 420.

Although overall food security conditions are gradually improving as “meher” crops are becoming available for local consumption, severe food insecurity conditions are reported in eastern areas of Oromia, Amhara and Tigray regions as well as in southern Afar and northern Somali regions, due to the lingering effects of the 2015 severe drought on local livelihood systems. In southern and southeastern areas, food security conditions for most pastoral households are worsening due to the unfavourable start of the current “deyr” (October – December) rains and its negative impact on pasture availability and livestock body conditions. In Afar and northern Somali regions, milk availability has improved following the positive effects on grazing resources of the favourable rains received during the last two seasons. However, most poor pastoral households still face high levels of food insecurity, as the size of their herds is still recovering from the large livestock deaths due to the 2015 El-Niño-induced drought.

Ethiopia is the largest refugee-hosting country in Africa, with over 743 000 registered refugees and asylum seekers estimated in late August, mainly originating from South Sudan, Somalia and Eritrea. Financial constraints have seriously limited the level of humanitarian assistance so far and the environmental degradation in camps, the fragile eco-system and the scarcity of resources have led to tensions between host communities and refugees in some locations.



GIEWS Country Brief Ethiopia

Reference Date: 14-September-2016

FOOD SECURITY SNAPSHOT

- Slightly below average production of 2016 secondary “belg” season crops
- Favourable prospects for 2016 main “meher” season crops
- Cereal prices are generally at high levels
- Number of people in need of assistance slightly declines, but food insecurity remains high

Production of 2016 secondary “belg” crops slightly below average

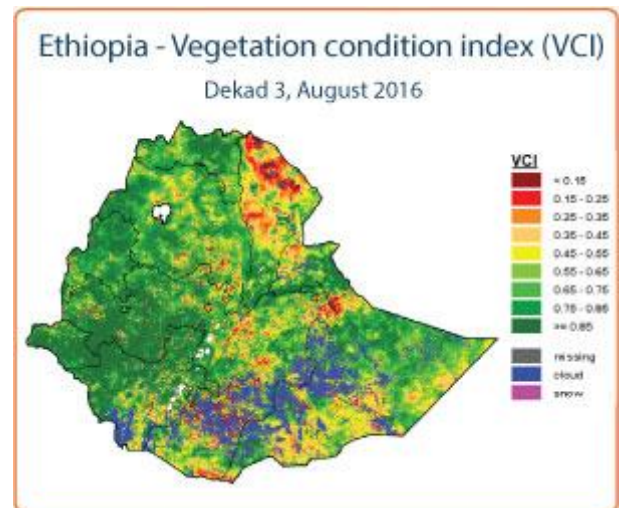
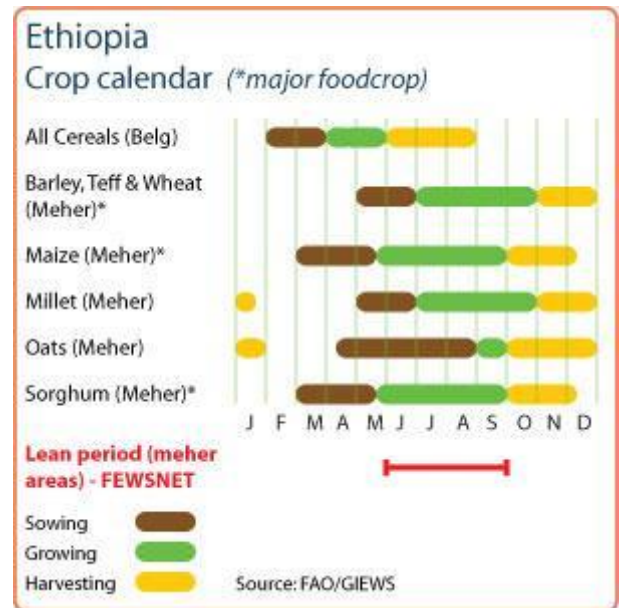
Harvesting of the secondary “belg” season crops has been recently completed, with some delay following a late onset of the rainy season. Yields in southern Tigray, eastern Oromia and eastern Amhara regions have been affected by inadequate soil moisture both at the beginning and at the end of the season. In addition, excessive rainfall in April/May caused localized water logging and flooding with ensuing losses of standing crops. By contrast, better yields have been obtained in SNNPR and central Oromia regions, where average to above-average cumulative rains were received in April and May, offsetting the impact of early season dryness. As a result, cereal production is estimated at about 1 500 tonnes, slightly below-average levels, but well above last year’s output (only 760 tonnes) that was severely reduced by the El Niño-induced drought.

Favourable prospects for 2016 main “meher” crops

Prospects of the 2016 main “meher” season crops, to be harvested starting from October, are generally good. “Kiremt” (June-September) rains started on time and have been favourable across the country, except in parts of SNNPR and eastern Oromia region (in particular in Arsi, West Arsi, East and West Haraghe woredas), where germinating crops have been affected by below-average precipitations. In SNNPR, where the “belg” harvest was substantially delayed, farmers opted to plant short-cycle “meher” crops, such as some varieties of wheat, teff and legumes, due to the shortened period for crop development.

Prices of most cereals at high levels

Prices of maize, which were relatively stable in recent months, increased in August by 10-15 percent despite the increase in supply from the recent “belg” harvest, as heavy rains and floods caused crop losses and disrupted marketing operations in some



areas. August prices, compared with their levels of 12 months earlier, were about 15 percent higher in the capital, Addis Ababa, and up to 25 percent higher in the other monitored markets. In Addis Ababa, prices of white sorghum and teff were firm in recent months and in August they were both 20 percent higher than one year earlier. By contrast, prices of wheat, partly imported, have been decreasing by 18-20 percent over the past 12 months, as the upward pressure on prices exerted by tight domestic availabilities was offset by sustained imports and declining international prices.

Prices of other food products are also higher than 12 months earlier. In August 2016, the year-on-year rate of inflation was 10-12 percent for meat, milk, cheese and eggs, and fruits. At regional level, the highest rates of food inflation were recorded in Afar (12.7 percent) and Tigray (17 percent) regions, due to the upward pressure exerted on prices by the lingering effects of the 2015 drought.

Food insecurity levels remain high in drought-affected regions

As a result of the impact of the 2015 drought on last year's "belg" and "meher" crop productions as well as on grazing resources in northern areas of the country, food security conditions have sharply deteriorated since mid-2015, with the estimated number of food insecure people increasing from 4.5 million in August to 10.2 million during the first semester of 2016. According to the August 2016 revision of the Humanitarian Requirements Document, following the start of the "belg" harvest, the number of people in need of assistance has been downward revised to 9.7 million. At the same time, the number of priority woredas slightly decreased from 429 to 420. Most food insecure people are still concentrated in eastern areas of Oromia, Amhara and Tigray regions as well as in Afar and northern Somali regions.

Overall food security conditions will improve by October as "meher" crops start to be available for local consumption. However, the situation is not expected to change for most agro-pastoral households in southern and southeastern areas. Here, "deyr" (October-December) rains are forecast to be below average due to the likely occurrence of La Niña, with negative consequences on pasture availability and livestock body conditions.

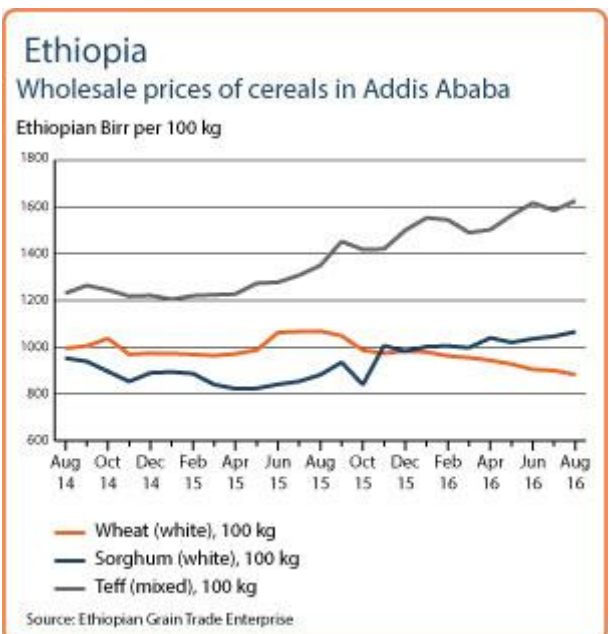
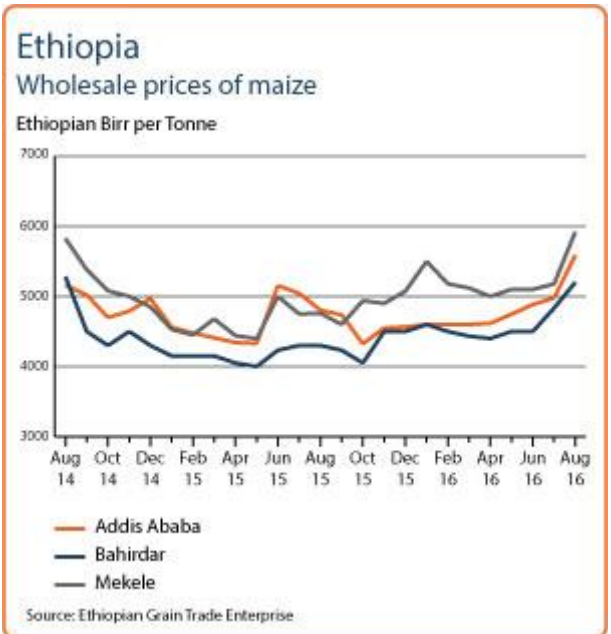
Currently, Ethiopia is the largest refugee-hosting country in Africa, with about 738 000 refugees and asylum seekers, mainly from South Sudan, Somalia, Eritrea and the Sudan. Financial constraints have seriously limited the level of humanitarian assistance so far and the environmental degradation in camps, the fragile ecosystem and the scarcity of resources have led to tensions between host communities and refugees in some locations.

Ethiopia

Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	6 311	5 600	7 000	25
Cereals nes	4 087	4 000	4 500	12
Sorghum	3 745	3 000	4 000	33
Others	6 323	6 077	7 135	17
Total	20 465	18 677	22 635	21

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 25-April-2016

FOOD SECURITY SNAPSHOT

- Planting of 2016 secondary “belg” season cereal crops is still underway
- March-May “belg” rains were erratic in March, delaying planting activities
- “Belg” rains improved in April, but pockets of moisture deficits remain in southern SNNPR and Oromia regions as well as eastern Amhara Region
- Cereal prices remain firm despite ongoing commercialization of 2015 main “meher” season harvest
- Number of people in need of food assistance estimated at high 10.2 million

Planting of 2016 secondary “belg” crops still underway in most highland areas

Planting of 2016 “belg” season crops is still underway in main “belg”-producing areas. After some good early rains at the end of February, the March-May “belg” rains have been generally erratic in March, delaying planting activities in most cropping areas. Precipitations improved significantly in April, but pockets of moisture deficits still persist in some areas of southern SNNPR and Oromia regions as well as in some parts of eastern Amhara Region (in particular in North Wollo, South Wollo and North Shewa woredas). According to the latest forecast of the National Meteorological Agency, “belg” rains are expected to be favourable for the remainder of the season, improving yields and pasture conditions. According to the Ministry of Agriculture and Natural Resources, about 2.2 million hectares of land are expected to be cultivated during the 2016 “belg” season

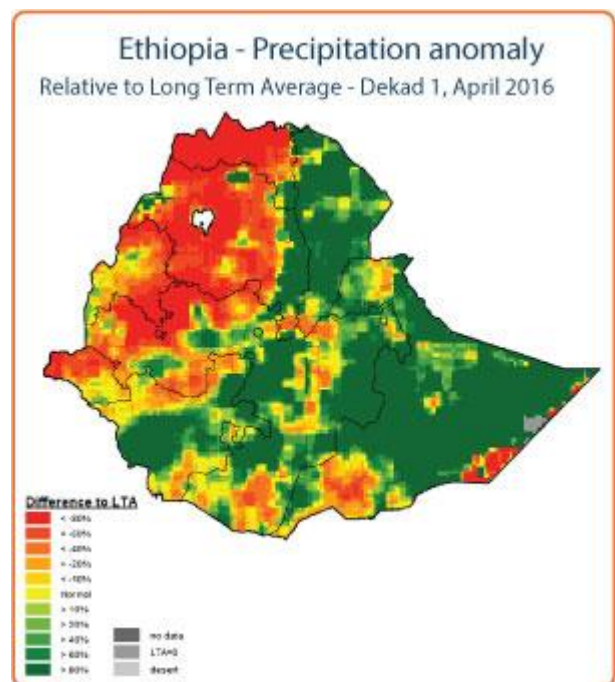
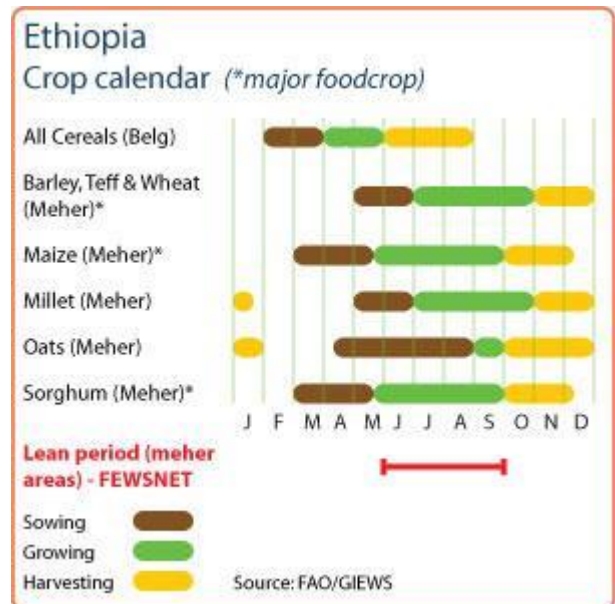
In central and southern woredas of Afar Region as well as in northern Somali Region, unfavourable “sugum” rains during the month of March had a significant negative impact on pasture conditions.

Wheat imports continue to increase

In response to the drought-induced food shortages, the Government has significantly increased commercial imports of wheat since the end of last year. After having imported about 1.3 million tonnes in 2015, wheat imports for the 2016 (January-December) marketing year are forecast at a high 1.5 million tonnes. This figure compares with an average of less than 600 000 tonnes of wheat that were commercially imported before the current crisis induced by El Niño and are even well above the quantity of about 750 000 tonnes of wheat imported in 2011 during the latest drought in the Horn of Africa.

Cereal prices remained firm in recent months

Prices of maize remained firm since October 2015 both in the capital, Addis Ababa, and in Bahirdar market, located in a key-growing area, despite the commercialization of the 2015 “meher” crops. By contrast, in Direedawa market, located in one of the drought-affected “belg” dependent areas, maize prices increased by 16 percent between



December 2015 and February 2016. Prices of maize in March 2016 in Addis Ababa and in Bahirdar markets were 4 and 8 percent, respectively, higher than in March 2015, while in Diredawa, despite the recent increases, they were still at the same levels of 12 months earlier, as the large carryover stocks from the above-average 2014 cereal production partly offset the upward pressure on prices of the reduced 2015 output.

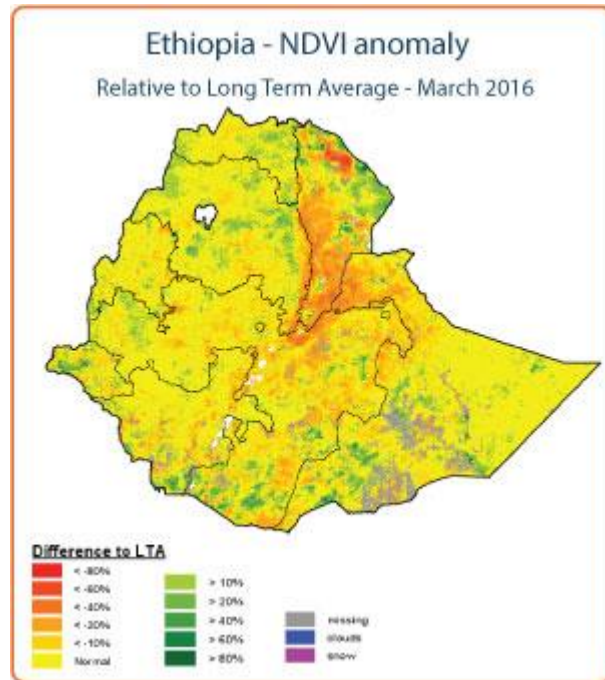
Prices of livestock products are generally at high levels. In March 2016, the year-on-year rate of inflation was 11 percent for meat and 19 percent for milk, cheese and eggs. Countrywide, the year-on-year food inflation rate in March was 7.3 percent, similar to the general inflation rate of 7.5 percent. At regional level, the highest rates of food inflation were recorded in the drought-affected regions of Afar (12.7 percent) and Tigray (14.5 percent).

Alarming food insecurity levels in most northeastern regions

As a result of the impact of drought on last year's "belg" and "meher" crop production as well as on grazing resources in northern areas of the country, food security conditions have sharply deteriorated since mid-2015, with the estimated number of food insecure people increasing from 4.5 million in August to 8.2 million by end-October and to 10.2 million in December. Most food insecure people are concentrated in eastern areas of Oromia, Amhara and Tigray regions as well as in Afar and northern Somali regions. At the beginning of April, a revision of the Priority Hotspot woreda classification has been issued by the Government, increasing the number of priority 1 woredas from 186 at the end of last year to a new total of 219.

Household seed reserves are severely depleted and alarming seed shortages are reported. According to the latest official estimates, about 1.7 million households do not have enough seeds to plant crops in the coming "meher" season. This is about four times the figure reported in the Humanitarian Requirements Document in December 2015.

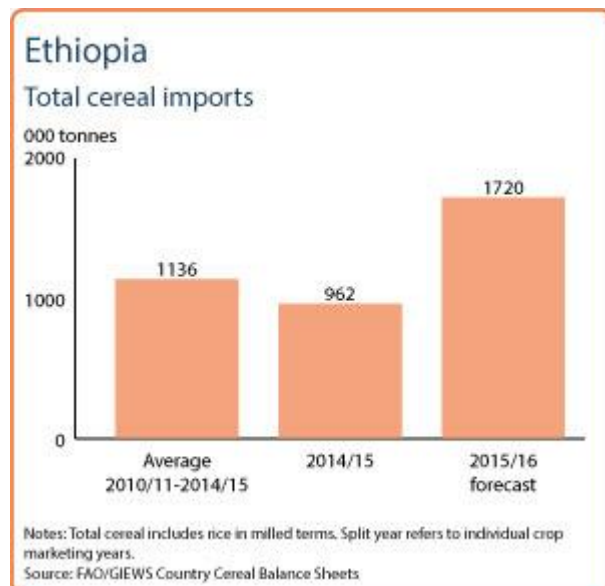
Currently, Ethiopia is the largest refugee-hosting country in Africa, with about 735 000 refugees and asylum seekers, mainly from South Sudan, Somalia, Eritrea and the Sudan. Financial constraints have seriously limited the level of humanitarian assistance so far and the environmental degradation in camps, the fragile eco-system and the scarcity of resources have led to tensions between host communities and refugees in some locations.



Ethiopia
Cereal production

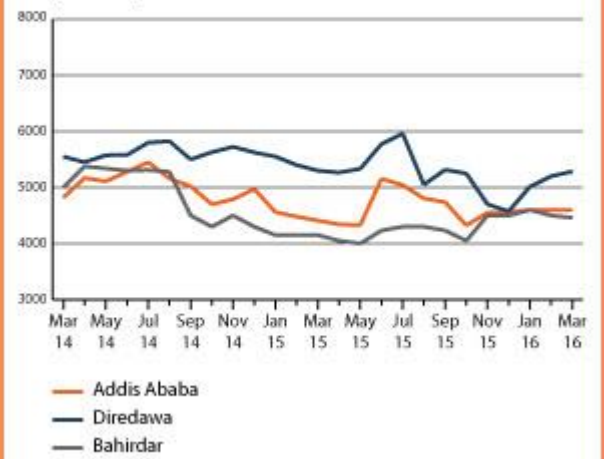
	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	6 188	7 235	6 300	-13
Cereals nes	3 983	4 751	4 000	-16
Sorghum	3 937	4 339	3 700	-15
Others	6 177	7 283	6 270	-14
Total	20 285	23 608	20 270	-14

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Ethiopia Wholesale prices of maize

Ethiopian Birr per Tonne



Source: Ethiopian Grain Trade Enterprise

Reference Date: 09-March-2016

FOOD SECURITY SNAPSHOT

- Planting of 2016 secondary “belg” season cereal crops underway
- March-May “belg” rains expected to be favourable, especially in SNNPR and southern Oromia Region
- Cereal prices remain firm despite ongoing commercialization of 2015 main “meher” season harvest
- Number of people in need of food assistance estimated at high 10.2 million

Planting of 2016 secondary “belg” crops underway in most highland areas

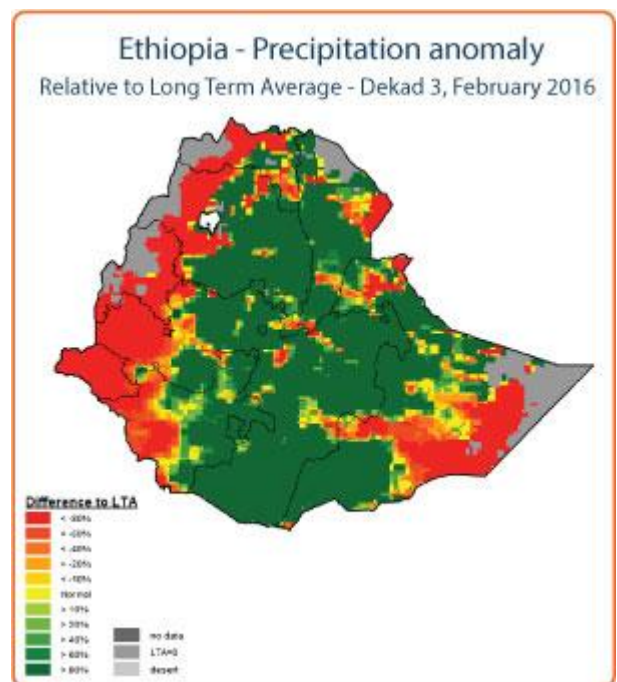
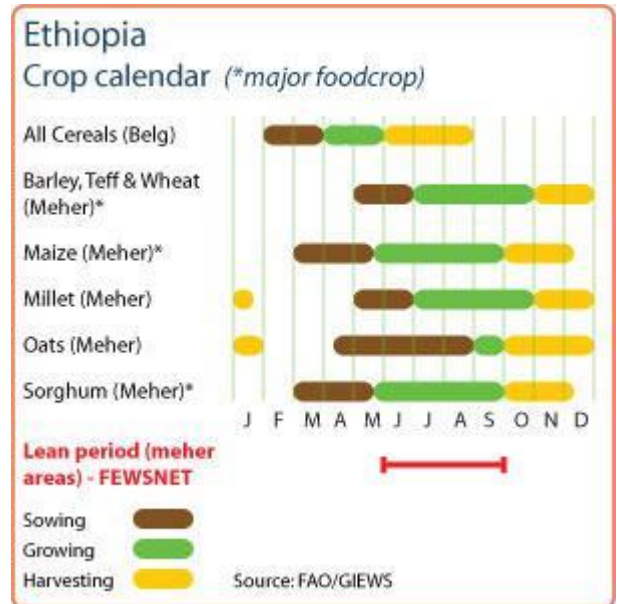
Land preparation and planting of “belg” season crops are underway in main “belg”-producing areas. The March-May “belg” rainy season had an early start during the third dekad of February, with above average amounts. According to latest meteorological forecast, “belg rains” are expected at average to above-average levels in most cropping areas of SNNPR and southern Oromia Region, while lower rainfall amounts are forecast to be received in eastern Amhara woredas of North Wollo, South Wollo and North Shewa.

Declining output estimated from 2015 main “meher” season cereal harvest

Harvesting of the 2015 main “meher” season cereal crops was completed at the end of last year. Although official estimates are not yet available, overall crop production is likely to be well below the good output gathered during the last few years as the 2015 June to September “kiremt” rainy season has been erratic in several cropping areas. According to satellite-based remote sensing analysis, yields have been favourable in western Oromia, western Amhara and SNNPR, while production in eastern Amhara, eastern Oromia and eastern Tigray has been negatively affected by a prolonged dry spell in July as well as very poor rainfall amounts received thereafter. In addition, in some bi-modal rainfall lowlands of Tigray and Amhara regions, production of long-cycle crops, including sorghum, has significantly declined as the poor performance of the 2015 secondary “belg” rainy season (March/July) prevented the timely preparation of land, inducing farmers to plant short-cycle crops such as wheat, barley and teff.

Sharp increase in wheat imports

In response to the drought-induced food shortages, the Government is planning to significantly increase the country’s commercial imports of wheat. At the end of October, one of the biggest import tenders in recent years has been launched seeking 1 million tonnes of wheat. This figure compares with an average of about 420 000 tonnes of commercially-imported wheat during the last five years and well above the quantity of about 750 000 tonnes of wheat imported in 2011 during the latest drought in the Horn of Africa.



Cereal prices remain firm despite recent harvest

Prices of maize remained firm in recent months in the Bahirdar market, located in a key-growing area, and in the capital, Addis Ababa, despite the commercialization of the 2015 “meher” crops. By contrast, in the Diredawa market, located in one of the drought-affected “belg”-dependent areas, maize prices increased by 14 percent between December 2015 and February 2016. Prices of maize in February were still around their levels of 12 months earlier, due to the large carryover stocks from the above-average 2014 cereal production, but are expected to increase in the coming months.

Prices of livestock products are generally at high levels. In February 2016, the year-on-year rate of inflation was 11.5 percent for meat and 17 percent for milk, cheese and eggs. Countrywide, the year-on-year food inflation rate in February was 9.2 percent, slightly higher than the general inflation rate of 8.7 percent. At regional level, the highest rates of food inflation were recorded in drought-affected regions of Afar (12.1 percent) and Tigray (14.6 percent).

Alarming food insecurity levels in most northeastern regions

As a result of the impact of drought on last year’s “belg” and “meher” crops production as well as on grazing resources in northern areas of the country, food security conditions have sharply deteriorated since mid-2015, with the estimated number of food insecure people increasing from 4.5 million in August to 8.2 million by end-October and to 10.2 million in December. Most food insecure people are concentrated in eastern areas of Oromia, Amhara and Tigray regions as well as in Afar and northern Somali regions. Wheat and maize from the Government’s food reserve as well as humanitarian agencies are being distributed in the worst affected areas. However, the country has received so far only about one-quarter of the total resource requirements for the current year and there is a high risk of pipeline breaks of relief commodities by end-April if the financial gap is not filled.

Ethiopia is the largest refugee-hosting country in Africa, with over 740 000 refugees and asylum seekers, mainly from South Sudan, Somalia, Eritrea and the Sudan. Financial constraints have seriously limited the level of humanitarian assistance and environmental degradation in camps, the fragile eco-system and the scarcity of resources have led to tensions between host communities and refugees in some locations.

Ethiopia

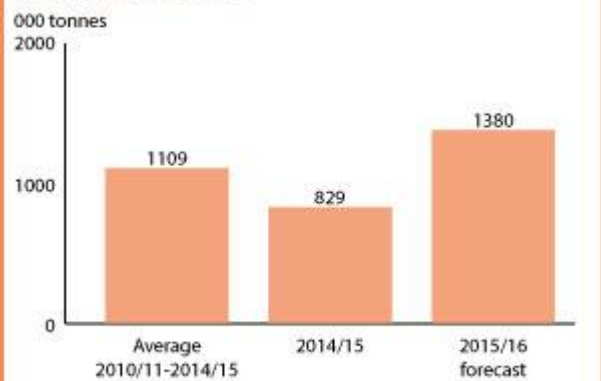
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Maize	6 224	7 235	6 300	-13
Sorghum	4 038	4 339	3 700	-15
Cereals nes	4 034	4 751	4 000	-16
Others	6 197	7 283	6 270	-14
Total	20 494	23 608	20 270	-14

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

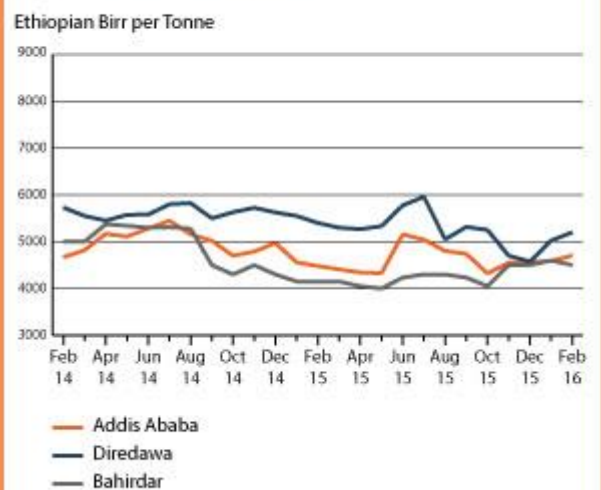
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Wholesale prices of maize



Source: Ethiopian Grain Trade Enterprise

Reference Date: 12-November-2015

FOOD SECURITY SNAPSHOT

- Drought conditions affecting pasture and water availability in most pastoral and agro-pastoral areas
- Mixed prospects for 2015 main “meher” cereal crops
- Cereal prices easing in October with beginning of “meher” crop harvest, while prices of livestock products and vegetables remain high
- Food security conditions sharply deteriorated in recent months due to drought conditions

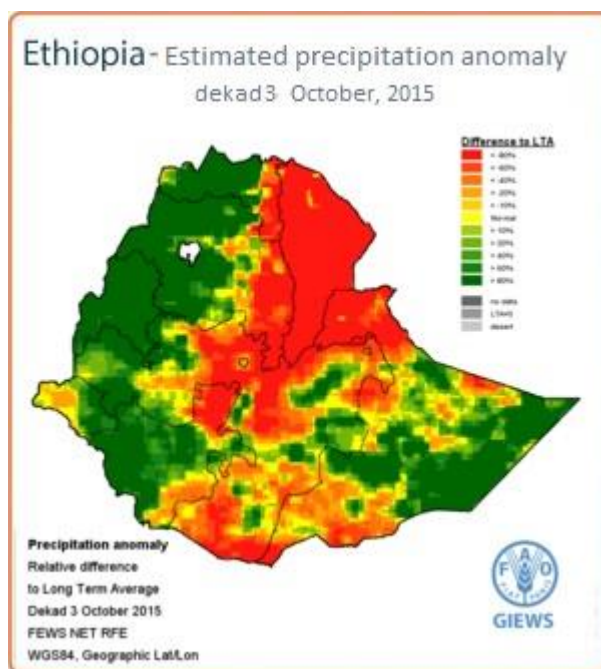
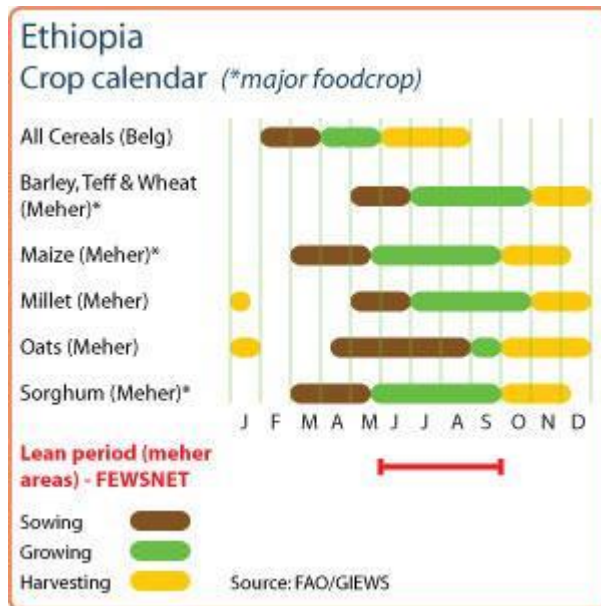
Severe drought results in livestock deaths and mainly impact on pastoralist livelihoods

Significant rainfall deficits are recorded in several pastoral areas, with the most severe drought conditions in northern parts, including Afar and northern Somali regions, which had two consecutive poor rainy seasons. The March to May rains, which constitute the main rainy season in eastern and southern pastoral areas, were up to 50 percent below average. The July to September “kiremt” rainy season started late and was followed by intermittent dry spells. Rangeland conditions and water availability in these areas were also acutely stressed, resulting in severe emaciation and unusual livestock deaths. In response, the Government of Ethiopia and humanitarian partners responded with the provision of feed (hay/straw and concentrates) in order to help livestock keep their body weight and productivity in terms of milk and meat; and medicine in order to maintain their health. Given the severity of the impact, mainly in pastoral areas, several appeals for assistance were made.

Mixed prospects for 2015 main “meher” cereal crop production

Harvesting of the 2015 main “meher” season cereal crops has recently started in lowland areas. Overall, crop prospects are mixed as the June to September “kiremt” rainy season was erratic in several cropping areas. According to satellite-based remote sensing analysis, crop conditions are generally favourable in western Oromia, western Amhara and SNNPR. However, yields in eastern Amhara, eastern Oromia and eastern Tigray have been negatively affected by a prolonged dry spell in July as well as very poor rainfall amounts received thereafter. In addition, in some bi-modal rainfall lowlands of Tigray and Amhara regions, production of long-cycle crops, including sorghum, is expected to decline as the poor performance of the 2015 secondary “belg” rainy season (March/July) prevented the timely preparation of land, inducing farmers to plant short-cycle crops such as wheat, barley and teff.

Harvesting of the secondary “belg” season crops was concluded in September, with about one-month delay, and production is estimated well below-average due to unfavourable rains. March to May rains started in April in most of the “belg” growing regions causing delays in plantings and reductions in planted area. Subsequently, rains were erratic and below average, with prolonged dry spells which caused wilting of a significant proportion of crops. The most affected areas are



northeastern Amhara, the highlands and midlands of eastern Oromia and eastern areas of SNNPR.

Cereal prices eased in October and are at low levels, while prices of dairy products and vegetables soared

In October 2015, maize prices declined in several monitored markets by 4-9 percent with the imminent start of the 2015 “meher” main season harvest. October prices were below their year-earlier levels despite the reduced 2015 “belg” secondary harvest, due to large carryover stocks from the above-average 2014 cereal production.

By contrast, other food items such as livestock products and vegetables are at high levels. In September, the year-on year rate of inflation was 13.2 percent for meat, 16.7 percent for milk, cheese and eggs, 21.1 percent for vegetables. Overall, the year-on-year food inflation rate in September was 16.1 percent, higher than the general inflation rate of 11.9 percent. At regional level, the highest rates of food inflation are recorded in drought-affected Afar (21.5 percent) and in the Addis Ababa region (28.6 percent), due to sustained local demand coupled with tight national supplies.

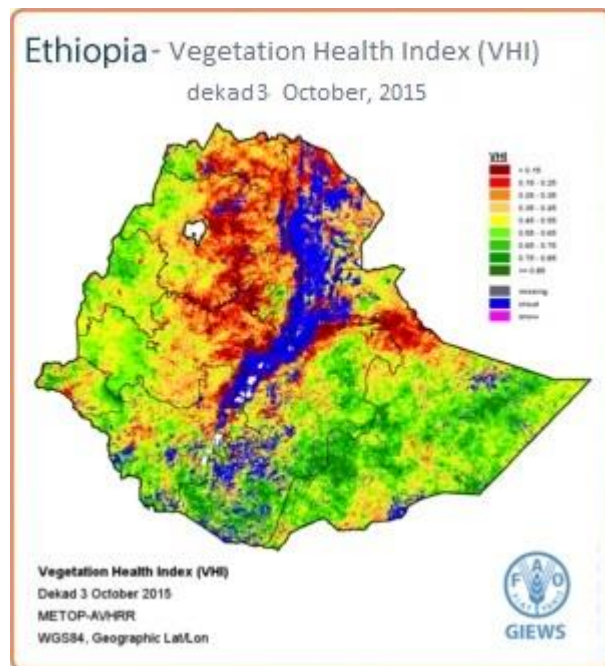
Sharp increase in wheat imports

In response to the drought-induced food shortages, the Government is planning to significantly increase the country’s commercial imports of wheat. At the end of October, one of the biggest import tender in recent years has been launched seeking for 1 million tonnes of wheat. This figure compares with an average of about 420 000 tonnes of commercially imported wheat during the last five years and well above the quantity of about 750 000 tonnes of wheat imported in 2011 during the latest drought in the Horn of Africa.

Food security conditions sharply deteriorate in recent months due to drought conditions

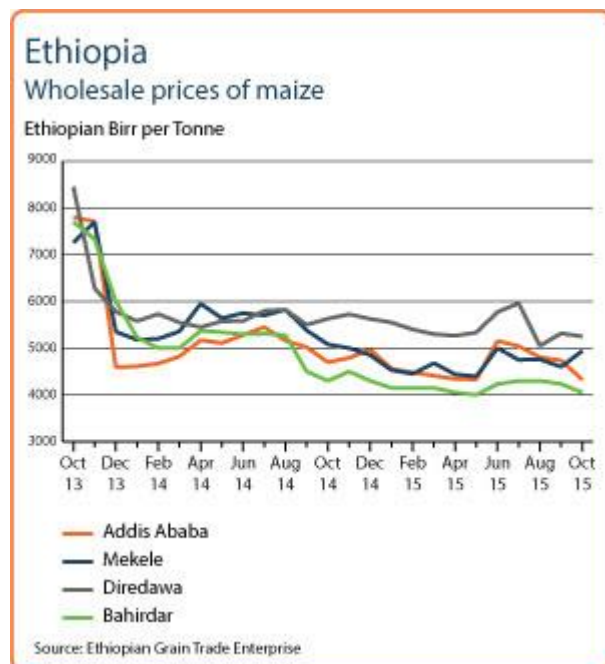
As a result of the impact of drought conditions, the food security situation has sharply deteriorated in recent months, with the estimated number of food insecure people increasing from 4.5 million in August to 8.2 million by end-October. The current figure is more than double than in the same period of 2014, when it was estimated at 3.2 million. Most food insecure people are concentrated in Oromia, Somali, Amhara and Tigray regions. Wheat and maize from the Government’s food reserve are being distributed in the worst affected areas, while the Government is planning to substantially increase its wheat imports in 2016.

By late September, Ethiopia hosted about 733 000 refugees and asylum seekers, mainly from South Sudan, Somalia, Eritrea and the Sudan. In particular, as of October, over 277 000 refugees were from South Sudan, mainly hosted in Gambella Region. Financial constraints have seriously limited the level of humanitarian assistance to date and environmental degradation in camps, the fragile eco-system and the scarcity of resources have led to tensions between host communities and refugees in some locations.



Ethiopia				
Cereal production				
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Maize	6,224	7,235	6,512	-10
Sorghum	4,038	4,339	4,122	-5
Cereals nes	4,034	4,751	4,513	-5
Others	6,197	7,283	6,930	-5
Total	20,494	23,608	22,077	-6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 23-January-2015

FOOD SECURITY SNAPSHOT

- Harvesting of main “meher” season crops is complete and overall production prospects are favourable
- In southern and southeastern pastoral areas, “deyr/hagaya” rains (October-December) were generally below-average and ended earlier than usual
- Below-average “xays/dada” rains affected pasture conditions in northern Afar region
- Cereal prices decline or remain stable in most markets
- Food security conditions continue to improve as newly-harvested “meher” crops are available for consumption

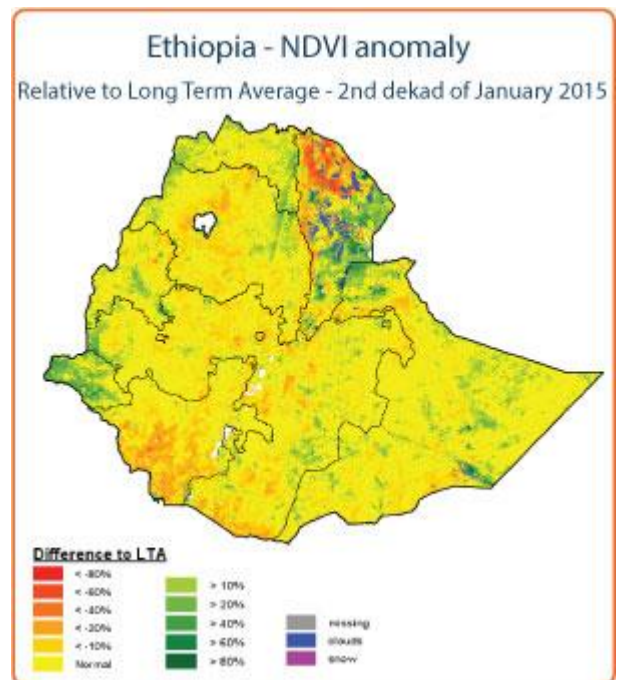
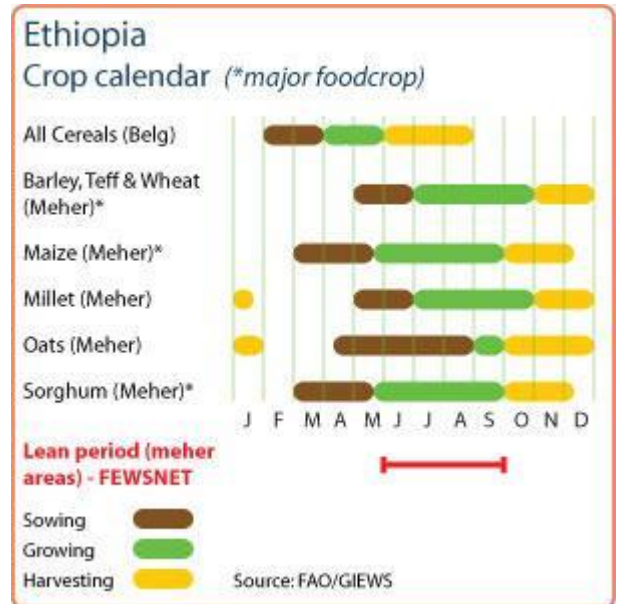
Favourable prospects for 2014 main “meher” season crop production

Harvesting of the 2014 main “meher” season cereal crops is complete. Cereal production from the smallholder sector is estimated at about 20 million tonnes, slightly above the level of the 2013 good harvest. Main season “kiremt” rains (June-September) have been generally abundant and well-distributed in most major western growing areas of Amhara, Benishangul Gumuz and western Oromia regions. Here, “kiremt” rains continued until mid-November, benefitting yields of late-planted varieties. By contrast, rains were late by two/four weeks, erratic and below average in some marginal producing areas of eastern Amhara (Wag Hamira and North Gonder zones), lowlands of Oromia (East and West Hararghe, Arsi, Borena, Bale and Guji zones) and parts of southern and eastern Tigray regions, reducing yields of long-cycle maize and sorghum crops which have been already affected by the early cessation of “belg” rains at planting time. In September and October, heavy rains in the highlands resulted in large-scale floods in Afar, Somali, SNNPR, Oromia, Tigray and Gambella regions, with significant displacements of people and damage to standing crops and pastures.

In southern and southeastern areas, the “deyr/hagaya” rains (October-December) started on time, but have been characterized by below-average amounts, prolonged dry spells and early cessation at the end of November. Despite the non-uniform distribution pattern of seasonal rains, the availability of grazing resources improved in most areas, leading to better livestock body conditions. However, early migrations of herds in search of pasture are reported in Dollo and Borena zones, along the border with Kenya. In northern Afar pastoral areas, “xays/dada” rains (October-February) have been well below-average, leading to poor pasture conditions (see NDVI anomaly map on the right).

Cereal prices decline or remain stable in most markets

Prices of maize declined by 10-20 percent in most monitored markets between July and October as crops from the “belg” harvest increased supplies. Subsequently, prices slightly increased in November following seasonal patterns and started to decline in December with the



commercialization of newly-harvested crops from the main 2014 “meher” harvest. Prices of maize in December were between 3 and 30 percent below the levels of 12 months earlier in most markets, while in the capital, Addis Ababa, they were 8 percent higher due to sustained local demand. In Addis Ababa, prices of red sorghum have been decreasing since May, and in December they were 30 percent lower than 12 months earlier, while prices of wheat, teff and white sorghum were mostly stable in recent months, and in December they were around the same levels of one year earlier.

Food security conditions continue to improve as the “meher” season harvest progresses

The lean season in most “meher” producing areas ended last October with the beginning of the green harvest. Food security conditions have gradually improved as the “meher” harvest progresses and new crops become available for consumption. In western surplus-producing areas, harvest labour opportunities are increasing the purchasing power of poor households, improving their access to food. However, access to food is likely to quickly deteriorate in areas that received below-average rains and production of long-cycle crops such as northeastern Amhara, eastern and southern Tigray, the lowlands of East Hararghe zone in Oromia, northeastern Afar and some pockets in southern Somali region.

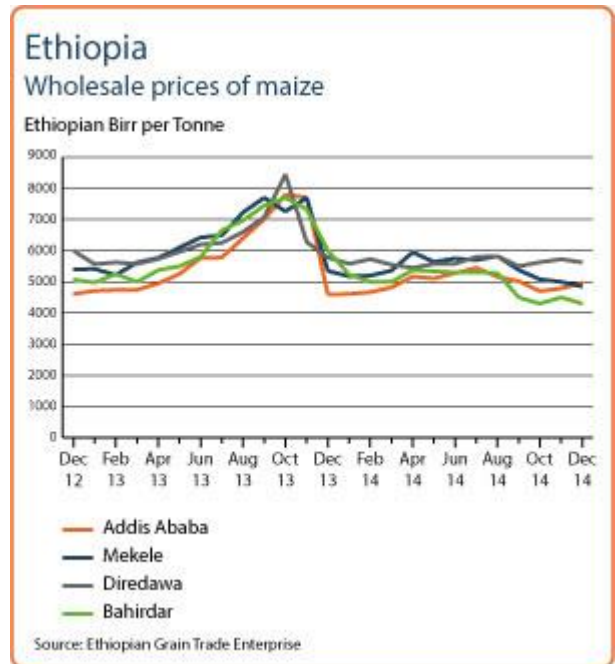
According to the mid-year review of the 2014 Humanitarian Requirements Document (HRD) carried out by the Disaster Risk Management and Food Security Sector (DRMFSS) of the Ministry of Agriculture (MoA) in August 2014, the number of people in need of relief food assistance until the end of 2014 was estimated at 3.2 million, about 18.5 percent more than in the first half of the year. The increased humanitarian needs reflected the below-average performance of the 2014 “belg” season crops in northeastern Afar, southern SNNP and Tigray regions as well as in south and southeastern pastoralist areas.

By mid-January 2014, Ethiopia hosted about 656 000 refugees and asylum seekers, mainly from South Sudan, Somalia, Eritrea and the Sudan. In particular, over 258 000 refugees are from South Sudan whose number rose quickly during the first six months of last year, with a peak of about 65 000 arrivals only during the month of June. Currently, the rate of new arrivals to Ethiopia from South Sudan has remained relatively low as the rainy season has drawn to an end, with 870 new arrivals entering since 1 December 2014.

Ethiopia
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Maize	5 009	6 158	6 170	0
Sorghum	3 458	3 604	3 750	4
Cereals nes	3 391	3 765	3 800	1
Others	5 425	6 208	6 290	1
Total	17 282	19 735	20 010	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 02-July-2014

FOOD SECURITY SNAPSHOT

- Favourable rains received at the beginning of the main “meher” season (June-September), mainly in western parts of the country
- Harvesting of the secondary “belg” season harvest is underway and output is expected at average levels
- Dry weather conditions affect grazing resources in southeastern and northern pastoral areas
- Cereal prices increase seasonally in most markets
- Food security conditions improve in “belg” season areas, while the lean season deepens in “meher” season areas

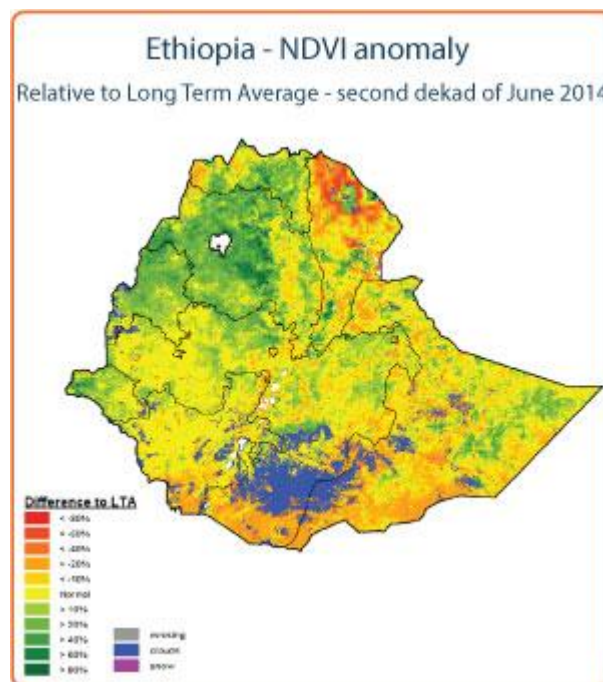
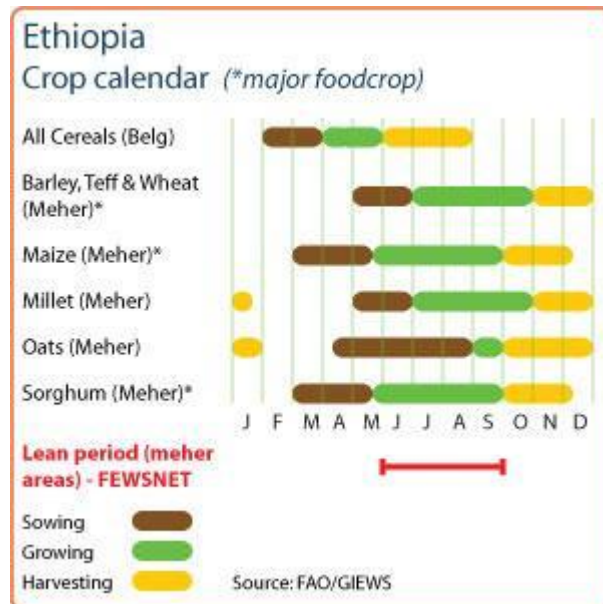
Favourable prospects for the 2014 main “meher” season crop production

Planting of the 2014 main “meher” season crops is well underway and in key producing areas of western Oromia, Amhara and Benishangul Gumuz regions, the current outlook of germinating crops is good. Adequate amounts of rainfall were received in most crop producing areas leading to positive vegetation index (see green areas of the map on NDVI anomaly). The harvest is scheduled to start from October and production prospects are generally favourable as June-to-September “kiremt” rains are forecast at average to above-average levels.

Harvesting of the secondary “belg” season crops has started normally in June and production is forecast at average levels, with the exception of Bale and Guji lowlands in Oromia region as well as southern SNNP region that received below-average cumulative rains. The 2014 multi-agency and multi-sector “belg” assessment started during the third week of June and is expected to provide detailed information about “belg” production.

Dry weather conditions affects pasture and water availability in most pastoral and agro-pastoral areas

Dry weather conditions prevailed in April and May in most pastoral and agro-pastoral areas of the country. The analysis of latest available satellite images indicates negative vegetation indexes - NDVIs in most south-eastern and northern pastoral areas, mainly in Somali and northern Afar regions as well as lowlands of Guji and Borena zones in southern Oromia region (see orange areas in the map on NDVI anomaly). In these areas, livestock have only partially returned from dry season grazing areas, with negative consequences on milk availability for most households. Some improvements are expected in northern pastoral areas of Afar region as “karan/karma” rains are expected to start in July and continue until September. Conversely, in southern pastoral areas, as the “deyr/hageya” rains will start only in October, the current below-average rangeland conditions are expected to further deteriorate during the June to September dry season, with consequent deterioration of livestock body conditions and productivity.



Cereal prices increase seasonally in most markets

A seasonal increase of about 11 to 18 percent was observed in wholesale prices of main cereals in most markets between February and April. More price increases are expected until October when newly harvested crops are supplied. In April, prices were still around their levels of 12 months earlier due to ample availabilities from the bumper 2013 main "meher" harvest. In the capital Addis Ababa, prices of wheat and red sorghum increased over the same period by 19 and 27 percent, respectively, sustained by a strong local demand, while prices of teff and white sorghum were relatively stable.

Food security conditions improve in "belg" areas, while the lean season deepens in "meher" areas

Food security conditions are improving in "belg" dependant areas as newly harvested crops become available for local consumption. By contrast, the lean season extended in most "meher" season crop producing areas and would continue until the beginning of the green harvest in October. Access to food is likely to deteriorate, particularly in eastern marginal crop producing areas that had a below average "meher" production in 2013, such as the Tezeke River catchment in Amhara region and north-eastern parts of Tigray region, where food stocks are expected to be depleted earlier than usual. Food security conditions are also expected to worsen for most pastoral communities in southern and south-eastern areas along the Kenyan border which are entering into the June-to-September dry season with depleted grazing resources.

According to the latest assessment by the Disaster Risk Management and Food Security Sector (DRMFSS) of the Ministry of Agriculture (MoA) released in January 2014, the number of people in need of emergency food assistance until the end of the year is estimated at 2.7 million, mainly in Oromia, Somali, Amhara and Tigray regions. This figure is expected to be adjusted based on the finding of the ongoing multi-agency and multi-sector "belg" assessment.

By the end of May 2014, Ethiopia was hosting about 570 000 refugees, mainly from Somalia, South Sudan, Eritrea and the Sudan. In particular, the flow of people from South Sudan is on the rise from the end of last year when the conflict erupted, with over 37 000 arrivals only during the month of May. In the most likely scenario, the South Sudanese refugees population in Ethiopia is expected to increase from 190 000 people in May 2014 to 300 000 people by the end of the year.

Ethiopia

Cereal production

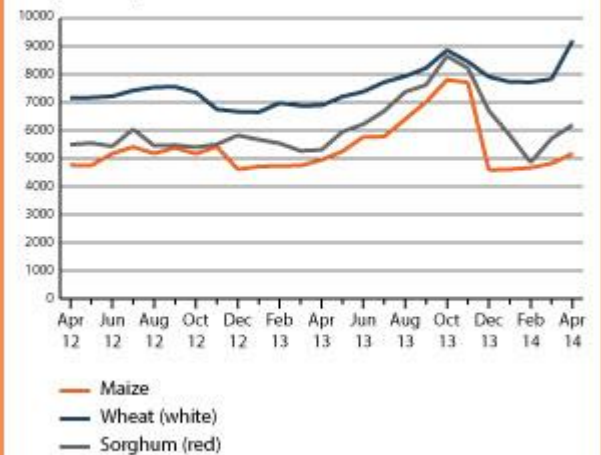
	2009-2013	2013	2014	change
	average			
	000 tonnes			percent
Maize	6 411	7 550	7 650	1
Sorghum	3 962	4 600	4 650	1
Cereals nes	3 685	4 300	4 300	0
Others	6 168	7 155	7 340	3
Total	20 227	23 605	23 940	1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Wholesale prices of cereals in Addis Ababa

Ethiopian Birr per Tonne



Source: Ethiopian Grain Trade Enterprise

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Harvesting of the main “meher” season crops is complete and production is estimated at above average levels
- Generally good pasture conditions and water availability in most pastoral and agro-pastoral areas
- Slight drop in cereal prices in November following record high levels, as newly harvested crops become available
- Food security conditions continue to improve as newly harvested “meher” crops are available for consumption

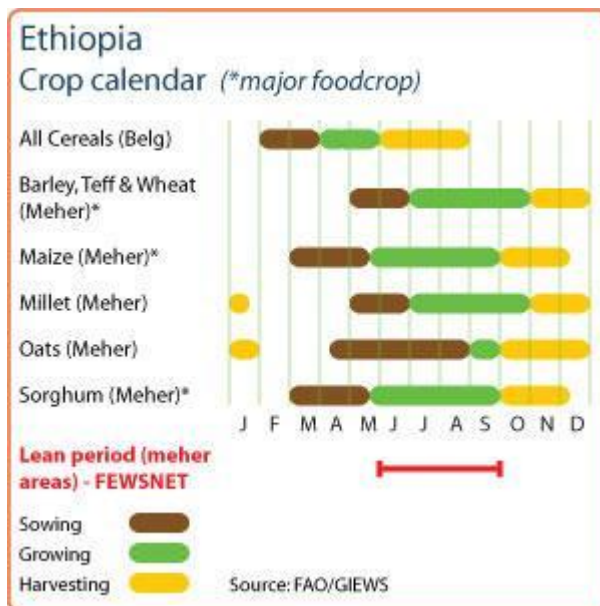
Favourable outcome of the 2013 main “meher” season crop production

Harvesting of the 2013 main “meher” season cereal crops is complete. Cereal production from the smallholder sector is estimated at about 23 million tonnes, about 10 percent above the level of the 2012 good harvest. Main season “kiremt” rains (June to September) have been generally abundant and well-distributed and the supply of agricultural inputs has been sufficient and timely. However, erratic and below average rains, coupled with floods and hailstorms, have reduced yields of “meher” crops in some marginal producing areas of Tigray, Amhara and Oromia regions. In addition, the onset of rains has been late by three-four weeks in some north-western sorghum producing areas and most farmers had to plant short-cycle early-maturing varieties of sorghum which have lower yields. The production of long-cycle crops, including sorghum, is expected to decline also in some bi-modal rainfall lowlands of north-eastern Tigray and Amhara regions. In these areas, the poor performance of the 2013 secondary “belg” season (March/July) often prevented the timely preparation of land for long-cycle crops, inducing farmers to plant short-cycle crops such as wheat, barley and teff.

Livestock body conditions and milk production are generally satisfactory throughout the country as favourable rains have improved pasture and water availability in most places. Residues of “meher” crops that have just been harvested are also improving forage supply. In most areas of Afar and northern Somali region, the 2013 “karma/karan” rains (June to September) have been timely, abundant and well distributed, with positive effects on livestock body conditions as well as crop development in sedentary farming areas. In most southern and south-eastern pastoral areas, the 2013 “deyr/hageya” rains (October to December) have started on-time and have been at average levels along the season, likely sustaining pasture and water availability until March 2014.

Cereal prices observe a slight dip following record high levels

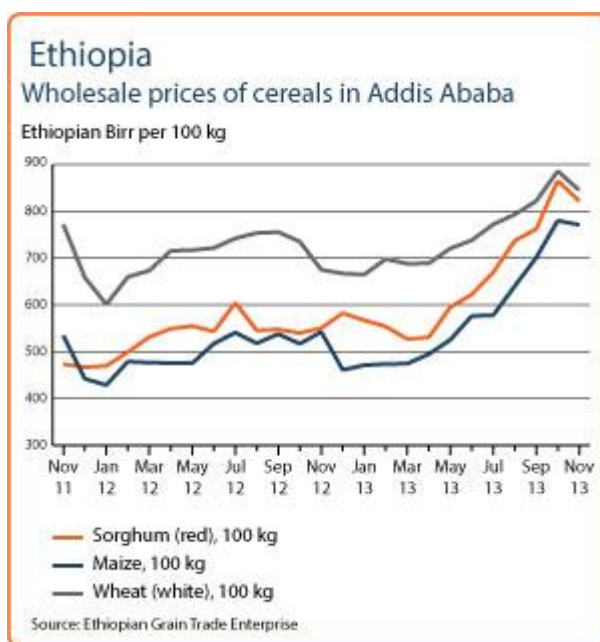
Prices of cereals declined slightly in November as the bulk of the 2013 *meher* harvest began to reach main markets, thus reversing the upward trend which started in March/April 2013 and was supported by the reduced output from the secondary *belg* season harvest, concluded in August. Despite recent declines, in the capital, Addis Ababa, November prices of maize, wheat and red sorghum were still 42, 25 and



Ethiopia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	5,768	7,151	7,800	9
Sorghum	3,611	3,769	4,200	11
Cereals nes	3,438	3,809	4,000	5
Others	5,731	6,323	7,160	13
Total	18,549	21,052	23,160	10

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



49 percent respectively higher than in the same month last year, while prices of teff were at the same levels.

Food security conditions continue to improve as the “meher” season harvest progresses

The lean season in most “meher” producing areas ended last October with the beginning of the green harvest. Food security conditions have gradually improved as the “meher” harvest progresses and new crops become available for consumption. In western surplus-producing areas, harvest labour opportunities are increasing the purchasing power of poor households, improving their access to food. However, access to food is likely to quickly deteriorate in areas that received below average rains such as north-eastern Amhara, eastern and southern Tigray, the lowlands of East Hararghe zone in Oromia, north-eastern Afar and some pockets in southern Somali region.

According to the latest assessment by the Disaster Risk Management and Food Security Sector (DRMFSS) of the Ministry of Agriculture (MoA) released in September 2013, the number of people in need of relief food assistance until the end of the year is estimated at 2.7 million, about 12 percent more than the first half of the year. The majority of food insecure households are concentrated in Oromia, Somali, Amhara and Tigray regions.

Reference Date: 18-December-2013

FOOD SECURITY SNAPSHOT

- Harvesting of the main “meher” season crops is well underway with favourable production prospects
- Generally good pasture and water availability in most pastoral and agro-pastoral areas
- Slight drop in cereal prices following record high levels in most markets, as newly harvested crops become available
- Food security conditions have started to improve from October with green harvest of “meher” crops

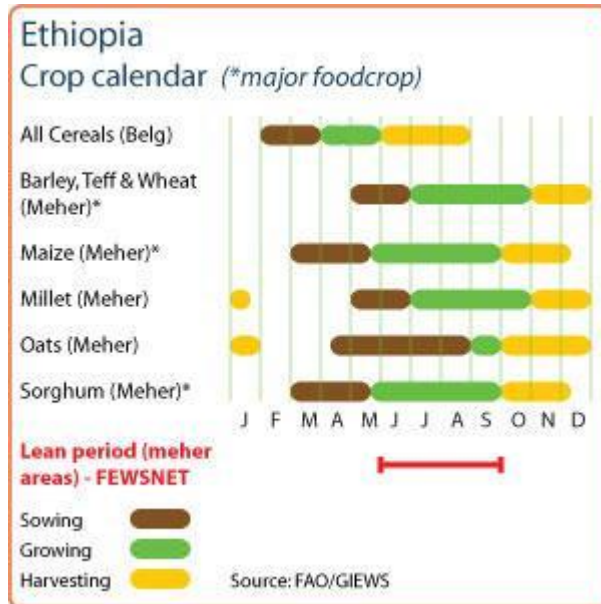
Favourable prospects for the 2013 main “meher” season crop production

Harvesting of the 2013 main “meher” season cereal crops is well underway and overall production is expected at above average levels. Main season “kiremt” rains (June to September) have been generally abundant and well-distributed and the supply of agricultural inputs has been sufficient and timely. However, erratic and below average rains, coupled with floods and hailstorms, have reduced yields of “meher” crops in some marginal producing areas of Tigray, Amhara and Oromia regions. In addition, the onset of rains has been late by three/four weeks in some north-western sorghum producing areas and most farmers had to plant short-cycle early-maturing varieties of sorghum which have lower yields. The production of long-cycle crops, including sorghum, is expected to decline also in some bi-modal rainfall lowlands of north-eastern Tigray and Amhara regions. In these areas, the poor performance of the 2013 secondary “belg” season (March/July) often prevented the timely preparation of land for long-cycle crops, inducing farmers to plant short-cycle crops such as wheat, barley and teff.

Livestock body conditions and milk production are generally satisfactory throughout the country as favourable rains have improved pasture and water availability in most places. Residues of “meher” crops that have just been harvested are also improving forage supply. In most areas of Afar and northern Somali region, the 2013 “karma/karan” rains (June to September) have been timely, abundant and well distributed, with positive effects on livestock body conditions as well as crop development in sedentary farming areas. Most southern and south-eastern pastoral areas received above average 2013 “gu/genna” rains (March to May) allowing to maintain livestock conditions and productivity during the June to September dry season. In these areas, the 2013 “deyr/hageya” rains (October to December) have started on-time and are forecast at average levels along the season, likely sustaining pasture and water availability until March 2014.

Cereal prices observe a slight dip following record high levels

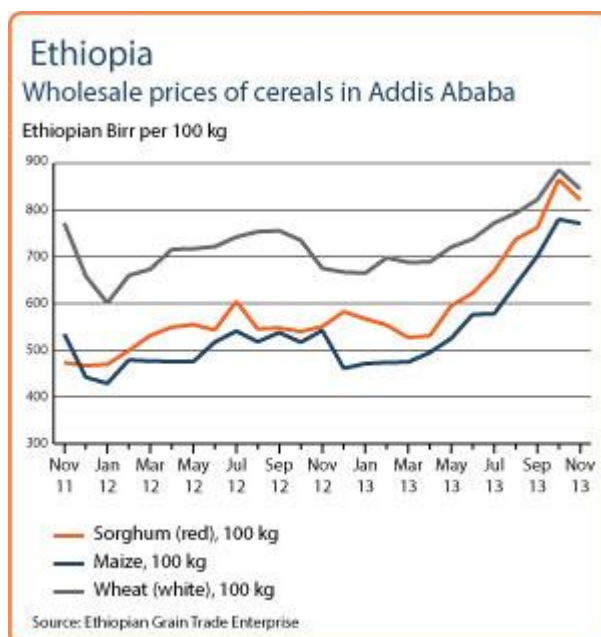
Prices of cereals declined slightly in November as the bulk of the 2013 *meher* harvest began to reach main markets, thus reversing the upward trend which started in March/April 2013 and was supported by the reduced output from the secondary *belg* season harvest, concluded in August. Despite recent declines, in the capital, Addis Ababa, November prices of maize, wheat and red sorghum were still 42, 25 and 49



Ethiopia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	5 768	7 151	7 150	0
Sorghum	3 611	3 769	3 600	-4
Cereals nes	3 438	3 809	3 800	0
Others	5 731	6 323	6 409	1
Total	18 549	21 052	20 959	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



percent respectively higher than in the same month last year, while prices of teff were at the same levels.

Food security conditions began to improve as the “meher” season harvest progresses

The lean season in most “meher” producing areas is over with the beginning of the green harvest in October. Food security conditions are gradually improving as the “meher” harvest progresses and new crops become available for consumption. In western surplus-producing areas, harvest labour opportunities are increasing the purchasing power of poor households, improving their access to food. However, access to food is likely to quickly deteriorate in areas that received below average rains such as north-eastern Amhara, eastern and southern Tigray, the lowlands of East Hararghe zone in Oromia, north-eastern Afar and some pockets in southern Somali region.

According to the latest assessment by the Disaster Risk Management and Food Security Sector (DRMFSS) of the Ministry of Agriculture (MoA) released in September 2013, the number of people in need of relief food assistance until the end of the year is estimated at 2.7 million, about 12 percent more than the first half of the year. The majority of food insecure households are concentrated in Oromia, Somali, Ahmara and Tigray regions.

Reference Date: 07-November-2013

FOOD SECURITY SNAPSHOT

- Harvesting of the main “meher” season crops is underway with favourable production prospects
- Generally good pasture and water availability in most pastoral and agro-pastoral areas
- Prices of cereals are at record high levels in most markets, but are expected to decline as newly harvested crops become available
- Food security conditions have started to improve in October with green harvest of “meher” crops

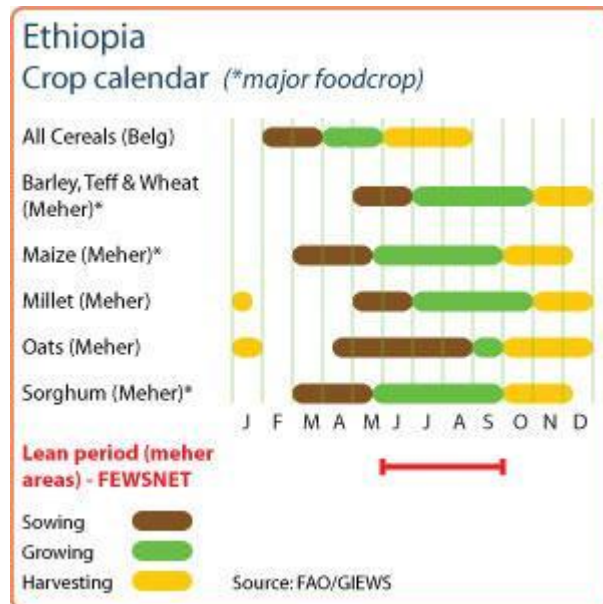
Favourable prospects for the 2013 main “meher” season crop production

Harvesting of the 2013 main “meher” season cereal crops has just begun and overall production is expected at above average levels. Main season “kiremt” rains (June to September) have been generally abundant and well-distributed and the supply of agricultural inputs has been sufficient and timely. However, erratic and below average rains, coupled with floods and hailstorms, have reduced yields of “meher” crops in some marginal producing areas of Tigray, Amhara and Oromia regions. In addition, the onset of rains has been late by three/four weeks in some north-western sorghum producing areas and most farmers had to plant short-cycle early-maturing varieties of sorghum which have lower yields. The production of long-cycle crops, including sorghum, is expected to decline also in some bi-modal rainfall lowlands of north-eastern Tigray and Amhara regions. In these areas, the poor performance of the 2013 secondary “belg” season (March/July) often prevented the timely preparation of land for long-cycle crops, inducing farmers to plant short-cycle crops such as wheat, barley and teff.

Planting of sweet potatoes has just started in major growing areas of southern SNNPR. Two consecutive favourable rainy seasons have significantly improved the availability of sweet potato cuttings which has been always short during the last ten years. If rains are favourable along the season, a good production is expected to be harvested in March 2014.

Livestock body conditions and milk production are generally satisfactory throughout the country as favourable rains have improved pasture and water availability in most places. Residues of “meher” crops that have just been harvested are also improving forage supply. In most areas of Afar and northern Somali region, the 2013 “karma/karan” rains (June to September) have been timely, abundant and well distributed, with positive effects on livestock body conditions as well as crop development in sedentary farming areas. Most southern and south-eastern pastoral areas received above average 2013 “gu/genna” rains (March to May) allowing to maintain livestock conditions and productivity during the June to September dry season. In these areas, the 2013 “deyr/hageya” rains (October to December) have started on-time and are forecast at average levels along the season, likely sustaining pasture and water availability until March 2014.

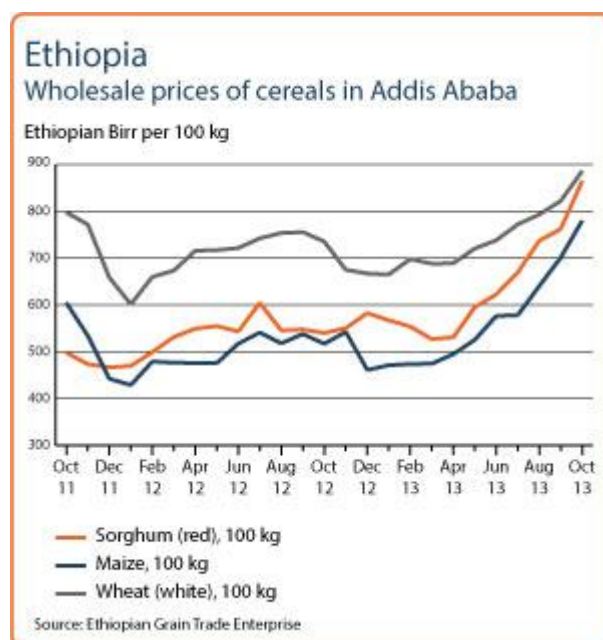
Cereal prices at record high levels in most markets



Ethiopia Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	5 768	7 151	7 150	0
Sorghum	3 611	3 769	3 600	-4
Cereals nes	3 438	3 809	3 800	0
Others	5 731	6 323	6 409	1
Total	18 549	21 052	20 959	0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Wholesale prices of cereals continued to strengthen in October in most markets and are at or near record levels. The rising trend started last March/April partly following the reduced output from the secondary belg season harvest, concluded last August. In Addis Ababa wholesale market, all major cereals were traded in October at record prices, with increases of about 60 percent during the last six months for red sorghum and maize and about 30 percent for wheat and white sorghum.

Food security conditions began to improve as the “meher” season harvest progresses

The lean season in most “meher” producing areas is over with the beginning of the green harvest in October. Food security conditions are gradually improving as the “meher” harvest progresses and new crops become available for consumption. In western surplus-producing areas, harvest labour opportunities are increasing the purchasing power of poor households, improving their access to food. However, access to food is likely to quickly deteriorate in areas that received below average rains such as north-eastern Amhara, eastern and southern Tigray, the lowlands of East Hararghe zone in Oromia, north-eastern Afar and some pockets in southern Somali region.

According to the latest assessment by the Disaster Risk Management and Food Security Sector (DRMFSS) of the Ministry of Agriculture (MoA) released in September 2013, the number of people in need of relief food assistance until the end of the year is estimated at 2.7 million, about 12 percent more than the first half of the year. The majority of food insecure households are concentrated in Oromia, Somali, Ahmara and Tigray regions.

Reference Date: 24-May-2013

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for secondary “belg” season crops
- Prices of cereals increase in most markets following the seasonal trend
- Food security declines in belg-dependant areas as the lean season reaches its peak
- Number of hosted refugees, two thirds of them from Somalia, reaches record level of about 400 000 people

Planting of the 2013 “meher” season long-cycle maize and sorghum crops, to be harvested from October to January, is underway in major producing areas of Oromia, Amhara and Benishangul Gumuz regions under improved rainfall conditions.

Late and erratic rains affect the start of the secondary “belg” season crops

The onset of the secondary “belg” rains was generally late by three to four weeks in February/March, negatively affecting planting operations of crops to be harvested from July. In “belg” cropping areas of southern Tigray and eastern Amhara regions, planted area was reported to be well below average levels. Yield levels are also expected to decline due to moisture deficits in March and April. In central and eastern Oromia and in SNNP regions, despite the rainfall delay, average crop conditions are reported. Heavy rains in late March, in the Shabelle River catchment areas of the Somali region, in East and West Hararghe zones of Oromia region and in Welayta and Sidama zone of SNNPR, have caused some localized flooding, affecting assets and livelihoods of about ten thousand households.

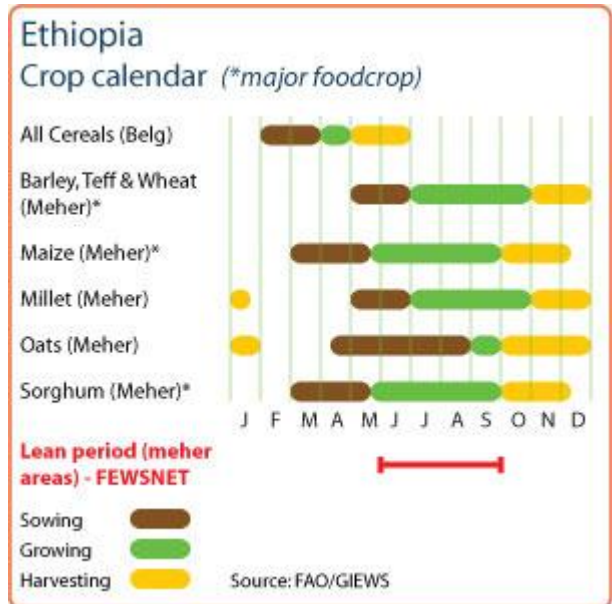
In SNNPR, the sweet potato production gathered between March and May was very low as a consequence of significant decline in planted area due to shortage of cuttings at planting time and persistent moisture deficit between October 2012 and February 2013.

In most southern and south-eastern agro-pastoral and pastoral lowland areas, timely, well distributed and above average March to May “gu/genna” rains have improved crop prospects and availability of pasture and water. Similarly, favourable March to May “sugum” season rainfall in the Afar region has reduced water shortages that were exacerbated by near-record hot weather conditions during the first quarter of 2013.

Prices of cereals are increasing seasonally

Following the seasonal decline in grain supply, wholesale prices of main cereals increased from March to mid-May by between 5 and 10 percent in most markets. Current prices of maize, red sorghum and mixed teff are higher than one year earlier by between 8 and 20 percent, while prices of wheat are almost at the same level. In particular, in Addis Ababa market, a quintal of red sorghum and mixed teff is traded at near-record levels of ETB 600 and ETB 1340.

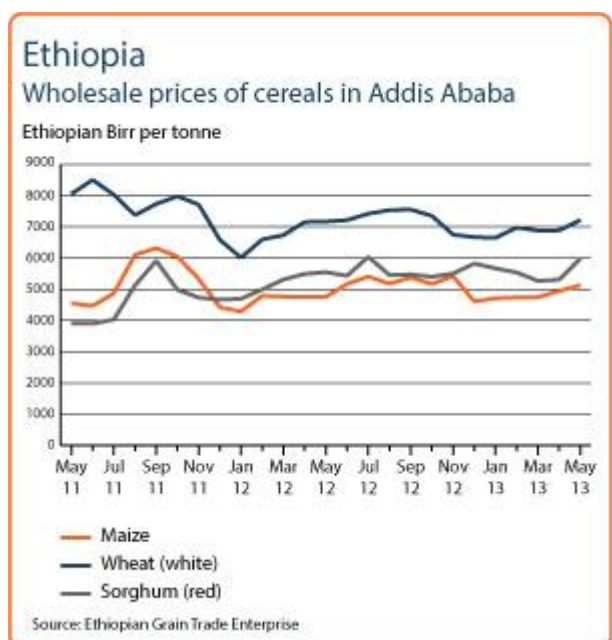
Food security conditions deteriorate in belg



Ethiopia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Maize	5,070	6,214	6,000	-3
Sorghum	3,392	4,106	4,000	-3
Cereals nes	3,343	3,830	3,700	-3
Others	5,476	6,166	5,984	-3
Total	17,280	20,316	19,684	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



season dependant areas as the lean season progresses

Food security conditions worsen in most “belg” season crop producing areas as the lean season is gradually peaking before the start of the harvest in late-June/July. The situation is particularly difficult in sweet potatoes growing areas of SNNPR following the poor output of the recent harvest and the reduced income opportunities from coffee plantations as a result of low coffee production and prices.

According to the last Humanitarian Requirements Document released in February 2013, the number of people in need of relief food assistance until June 2013 was estimated at 2.4 million, well below the 3.7 million people in August 2012, mainly due to the good production of the 2012 “meher” season crops which significantly contributed to the improvement of food access to many vulnerable households. Currently, the majority of food insecure households are located in the Somali (pastoral and agro-pastoral areas), Oromia (mostly lowland areas), Tigray (especially eastern and southern zones) and SNNP regions.

As mid-May 2013, about 394 000 refugees are hosted in Ethiopia, 60 percent (approximately 240 000 people) of them from Somalia and 90 000 Sudanese that fled the conflict in the Blue Nile state since September 2011 and some 66 000 people from Eritrea. In April 2013, there were an estimated 190 000 people residing in the five Dollo Ado camps in the Somali region, with approximately one-third of children categorised as severely malnourished.

Reference Date: 09-January-2013

FOOD SECURITY SNAPSHOT

- Favourable estimates for the overall production of the 2012 main “meher” season crops
- Prices of cereals decline in most markets, but are generally still well above average
- Estimated number of people in need of food assistance expected to decrease in the coming months
- Number of refugees, mainly from Somalia, remains at record level of 370 000 people

Generally favourable prospects for the 2012 main season “meher” crop production

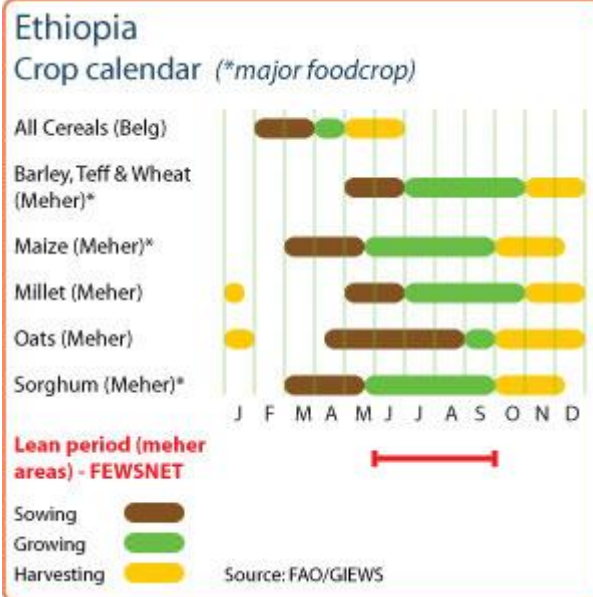
Harvesting of the 2012 main “meher” season cereal crops is underway and overall production is preliminary estimated at above average levels. Production prospects are particularly favourable in western surplus-producing areas of the country due to abundant, well-distributed and extended main season “kiremt” rains (June to September) coupled with an improved availability of fertilizers and seeds. By contrast, rains had erratic distribution and early withdrawal in some eastern relatively marginal meher-producing areas including east and south Tigray, the Oromia zone in Amhara region and lowland districts (woredas) in East and West Hararghe zones. The belg-dependent areas in Southern Nations, Nationalities, and Peoples’ Region (SNNPR) also expect below average harvests.

In some bi-modal rainfall areas, production of long-cycle crops (maize, sorghum and millet) is expected to decline due to the late arrival of the 2012 “belg” rains that prevented farmers from timely preparation of land and led them to opt for planting short-cycle crops (wheat and barley) with lower yields. Planting of sweet potatoes is complete in major growing areas of southern SNNPR and shortage of cuttings is expected to dampen production to be harvested next May.

In southern and south-eastern pastoral areas, the 2012 “deyr/hagaya” rains (October to December) started mostly on time and have been near average throughout the season, with some flooding along the Wabi Shabelle River in Somali region. The availability of pasture and water is already improving in some areas, with positive effects on livestock body conditions and milk production.

Prices of cereals decline, but remain at high levels in most markets

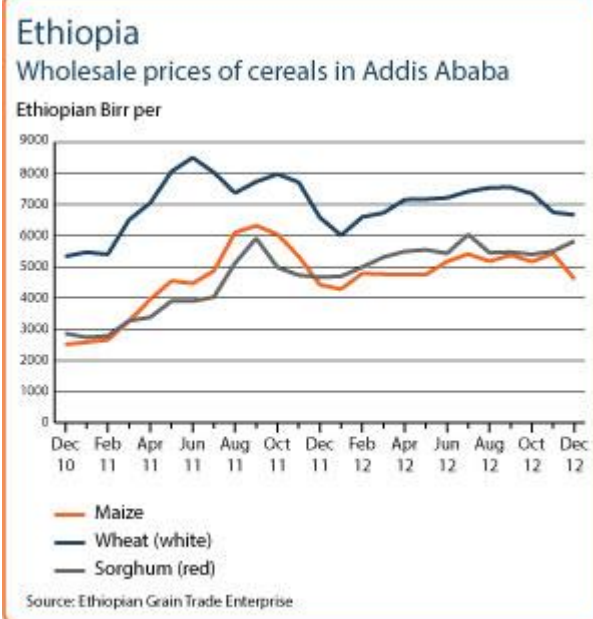
Wholesale prices of maize, wheat, white sorghum and teff declined in December 2012 in most monitored markets with the bulk of the 2012 “meher” season harvest increasing supplies. In Addis Ababa wholesale market, prices of maize, white sorghum and teff declined by 15, 6 and 7 percent, respectively, while prices of wheat remained generally stable due to high demand. By contrast, prices of red sorghum continued to increase in December and they are currently 25 percent higher than in the same month last year. In most monitored markets, current prices of cereals are well above their levels of 24 months ago.



Ethiopia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Maize	5,070	6,214	6,000	-3
Sorghum	3,392	4,106	4,000	-3
Cereals nes	3,343	3,830	3,700	-3
Others	5,476	6,166	5,984	-3
Total	17,280	20,316	19,684	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Improving general food security conditions

Overall food security conditions have gradually improved as newly harvested 2012 “meher” season crops become available at household level. However, market access to food by poor and very poor households remain difficult in some eastern marginal cropping “meher” producing areas of Amhara and oromia, in predominantly belg-dependant southern areas of SNNPR and in pastoral and agro-pastoral areas of Afar and northern Somali region.

Last August, the estimated number of people in need of humanitarian assistance has been revised upwards from 3.2 to 3.7 million, mainly as a consequence of poor 2012 “belg” and “gu/ganna” rains in some areas of Somali, Tigray, Oromia and SNNP regions. This number is expected to be revised downwards following the results of the Government-led national needs assessment to be released early 2013.

Currently, about 370 000 refugees are hosted in Ethiopia, two-thirds of them from Somalia, about 90 000 Sudanese that fled the conflict in the Blue Nile and South Kordofan states since the end of 2011 and the rest from Eritrea. At the beginning of January 2013, there were an estimated 180 000 people residing in the five Dollo Ado camps in the Somali region, with approximately one-third of children categorised as severely malnourished.

Reference Date: 20-November-2012

FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2012 main “meher” season crops
- Prices of maize and wheat decline in most markets, while prices of sorghum and teff are still well above average
- Estimated number of people in need of food assistance expected to decrease in the coming months
- Number of refugees, mainly from Somalia, remains at record level of 300 000 people

Generally favourable prospects for the 2012 main season “meher” crop production

Harvesting of the 2012 main “meher” season cereal crops is underway and overall production is expected to be slightly above average levels. Production prospects are particularly favourable in western surplus-producing areas of the country due to abundant and well-distributed main season “kiremt” rains (June to September) coupled with an improved availability of fertilizers and seeds. By contrast, rains were erratic in some eastern relatively marginal meher-producing areas including east and south Tigray, the Oromia zone in Amhara region and lowland districts (woredas) in East and West Hararghe zones. The belg-dependent areas in Southern Nations, Nationalities, and Peoples’ Region (SNNPR) also expect below average harvests.

The production of long-cycle crops (maize, sorghum and millet) is expected to decline in some bi-modal rainfall areas due to the late start of the 2012 secondary “belg” season (March/July) that prevented farmers from timely preparation of land and leading to farmers opting to planting short-cycle crops (wheat and barley) with lower yields. Planting of sweet potatoes, for harvested in May 2013, is underway in major growing areas of southern SNNPR where shortage of cuttings is expected to dampen production.

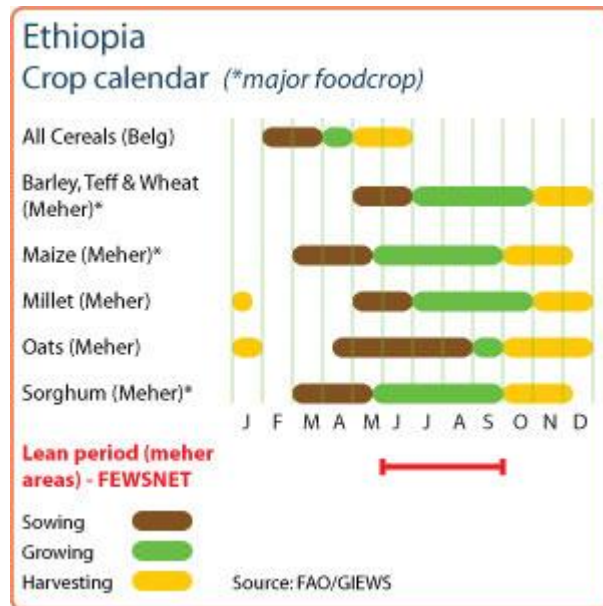
In southern and south-eastern pastoral areas, the 2012 “deyr/hagaya” rains (October to December) started at the end of September, two weeks earlier than usual, and are expected to be at average to above average levels throughout the season, with some risk of flooding along the Wabi Shabelle River. The availability of pasture and water is already improving in some areas, with positive effects on livestock body conditions and milk production.

Lower cereal import requirements forecast for 2013

Based on current production forecast, the cereal import requirement, mainly wheat, in the 2013 (January/December) marketing year is forecast at about 1.1 million tonnes, mainly wheat and wheat flour, similar to last year. Actual imports until June 2012 are put at about 750 000 tonnes, including 470 00 tonnes of food aid.

Maize and wheat prices decline, while prices of sorghum and teff remain high

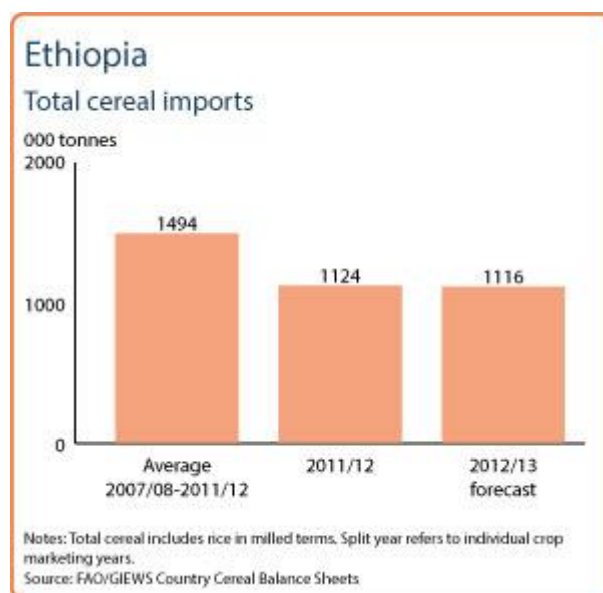
Wholesale prices of main cereals, maize, wheat and sorghum, declined moderately in October with the start of the 2012 main season harvest. Maize and wheat were traded in Addis Ababa wholesale market at



Ethiopia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Maize	5,078	6,258	6,000	-4
Sorghum	3,395	4,123	4,000	-3
Cereals nes	3,345	3,839	3,700	-4
Others	5,493	6,255	6,020	-4
Total	17,312	20,475	19,720	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



ETB 517 and 735 per 100 kg, respectively, about 3.9 and 2.7 percent below their levels of one month earlier. The current price of both commodities was between 8 and 15 percent below the level of 12 months before. By contrast, wholesale red and white sorghum prices have marginally decreased in most markets by an average 1-2 percent during last month and remain between 8 and 45 percent above October 2011. Wholesale prices of teff continue to register record levels reaching about ETB 1 400 per 100 kg in October 2012, about 56 percent above one year earlier.

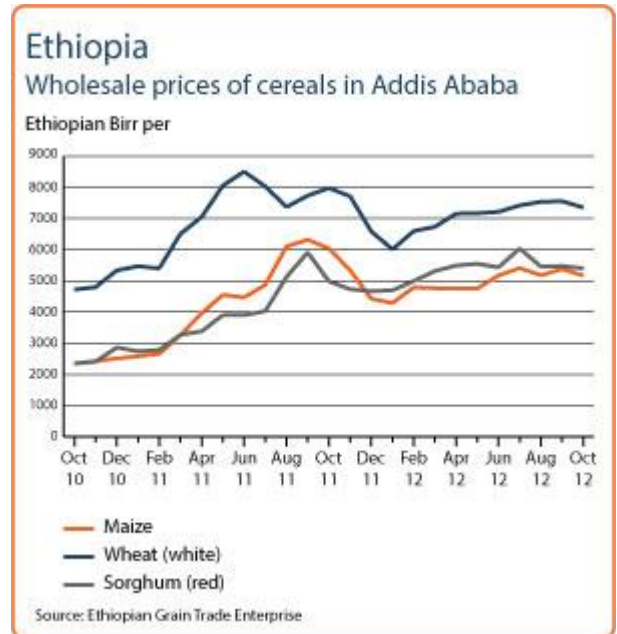
According to the Central Statistics Agency (CSA), the year-on-year inflation rate dropped to 15.8 percent in October from 19 percent a month earlier. This is mainly due to the slowdown in food price inflation that dropped for the eighth consecutive month to 13.2 percent in October, down from a revised 17.6 percent in September.

Improving general food security conditions

Overall food security conditions are gradually improving as newly harvested 2012 “meher” season crops become available at household level. However, market access to food by poor and very poor households remain difficult in some eastern marginal cropping “meher” producing areas, in belg-dependant areas on SNNPR and in pastoral and agro-pastoral areas of Afar, Borena zone in Oromia and Somali region.

In August, the estimated number of people in need of humanitarian assistance has been revised upwards from 3.2 to 3.7 million, mainly as a consequence of poor 2012 “belg” and “gu/ganna” rains in some areas of Somali, Tigray, Oromia and SNNP regions. This number is expected to be revised downwards following the results of the Government-led Meher Assessment to be released in December/January.

Currently, the total number of refugees in Ethiopia exceeds 300 000 people, two-thirds of them from Somalia plus about 69 000 Sudanese that fled the conflict in the Blue Nile and South Kordofan states since the end of 2011. At the beginning of October 2012, there were an estimated 170 000 people residing in the Dollo Ado camp in the Somali region, with approximately one-third of children categorised as severely malnourished.



Reference Date: 19-July-2012

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for 2012 secondary “belg” season cereal crops to be harvested from August
- Since February 2012 cereal prices are high in most markets
- Estimated number of people in need of food assistance expected to increase in the coming months
- Number of refugees, mainly from Somalia, remains at record level of 300 000 people

Early forecast of the 2012 “belg” crop production put at below average levels

The 2012 “belg” rains (mid-February to May) were delayed by up to eight weeks in some areas, with negative effects on area planted and yields. “Belg” harvest is expected to start late in August and cereal crop production is forecast at below average levels. Most affected regions are eastern SNNPR, eastern Amhara, central Oromia and southern Tigray. In some parts of western, eastern and central Ethiopia, soil moisture in March-May was also insufficient for preparing land and planting long-cycle “meher” crops (maize, sorghum and millet) and farmers were often opting to plant short-cycle crops (wheat and barley) with lower yields.

Following a slow start, the 2012 “kiremt” rains (June to September) have improved in most “meher” cropping areas, with some exceptions in pocket areas of Amhara and Gambella. According to the National Meteorological Agency (NMA), the “kiremt” rains are forecast to intensify during the second half of July, even with some probability of localized floods, but are expected to withdraw early in August (due to an increased likelihood of development of El Niño conditions). This is expected to negatively impact on yields especially where delayed “belg” rains resulted in late planting of long-cycle “meher” crops.

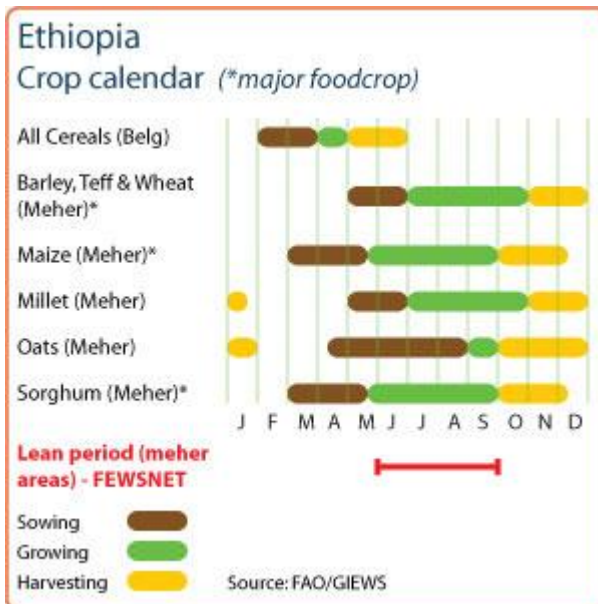
In pastoral areas of Afar and northern Somali zones of Shinile and Jijiga, “karma/karan” (mid-July to mid-September) rains are about to start bringing some relief to grazing resources that were affected by the early cessation of “gu/ganna” rains (April to June). In southern and south-eastern pastoral and agro-pastoral areas, normal dry weather conditions prevail and are expected to persist until October with the onset of the smaller “deyr/hageya” season rains.

Despite the unfavourable prospects for the secondary “belg” season crops, the 2011/12 overall cereal output is still put at a record 20.5 million tonnes on account of the improved main season rains.

Lower cereal import requirements forecast

Based on increased production forecast, the cereal import requirement, mainly wheat, in the 2012 (January/December) marketing year is forecast at about 850 000 tonnes compared to the over one million tonnes estimated in 2011.

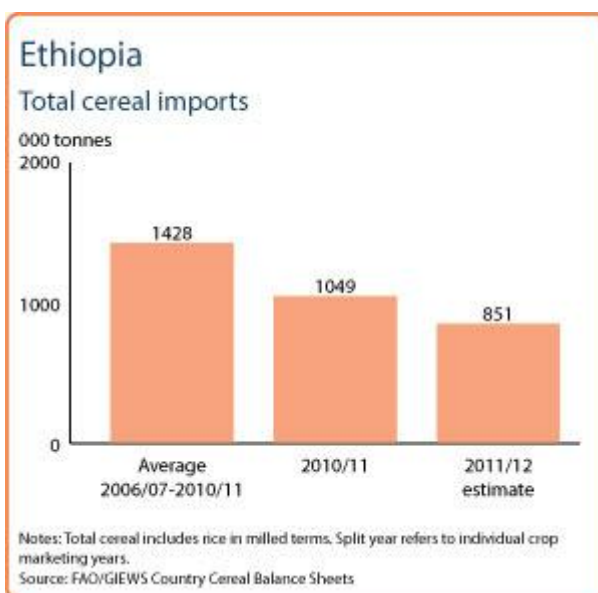
Cereal prices remain stable but high in most markets



Ethiopia Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	4 680	5 796	6 258	8
Cereals nes	3 074	3 539	3 839	8
Sorghum	3 042	4 149	4 123	-1
Others	5 155	5 737	6 255	9
Total	15 951	19 221	20 475	7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



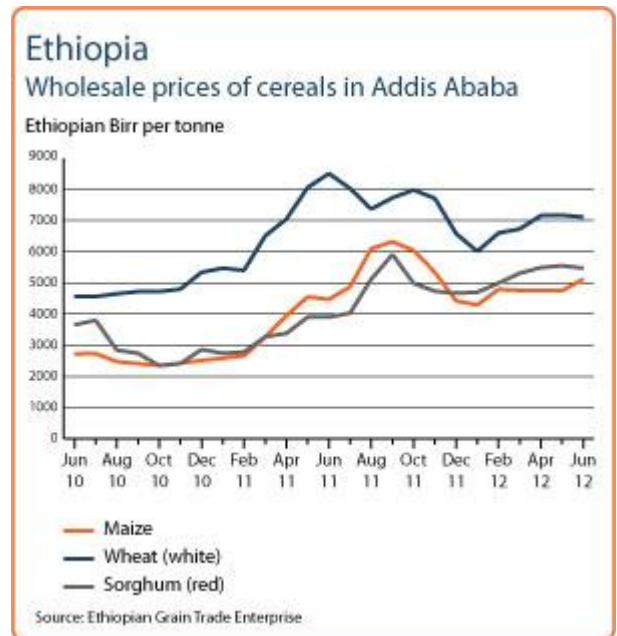
Wholesale cereal prices were on the rise since February 2012, earlier than usual and are currently stable at high levels. In June 2012, maize and red sorghum were traded in Addis Ababa wholesale market at ETB 512 and 547 per 100 kg, respectively, about 20 and 16 percent above their levels of six months earlier. Wholesale wheat prices have also increased in most markets by an average 18-20 percent since the beginning of the year, mainly following increases in international prices. Wholesale prices of teff have reached record levels of ETB 1 100-1 300 per 100 kg in June 2012. The highest prices of cereals were observed in Dire Dawa market, between 6 and 14 percent higher than in Addis Ababa.

A prolonged lean season in belg-dependant areas worsen food security conditions

The estimated number of people in need of food assistance in the first half of 2012 was set at 3.2 million. This number is likely to be revised upwards when the new official estimates are released, probably at the end of July with the launch of the new Humanitarian Requirements Document (HRD). The expected revised estimates are based on the results of the gu/belg/ganna/sugum Government-led multi agency needs assessment carried out in June.

Food security conditions are gradually deteriorating in areas of central Oromia (East and West Hararghe zones), eastern SNNPR, eastern Amhara (North and South Wollo zones) and southern and eastern Tigray that are experiencing a prolonged lean season given the delay of the “belg” harvest. In particular, the Disaster Risk Management and Food Security Sector (DRMFSS) has already tripled the number of relief food beneficiaries in SNNPR, from about 98 000 people at the beginning of the year to more than 327 000 people by mid-June, with a significant additional caseload in the root-crop-dependant Wolayita zone.

The total number of refugees in Ethiopia has reached approximately 300 000 people, two-thirds of them from Somalia plus about 36 500 Sudanese that fled the conflict in the Blue Nile and South Kordofan states since the end of 2011 and about 60 000 Eritreans. At the end of June 2012, there were an estimated 157 700 people residing in the Dollo Ado camp in the Somali region, with approximately one-third of children categorised as severely malnourished.



Reference Date: 04-April-2012

FOOD SECURITY SNAPSHOT

- Late onset of 2012 “belg” rains in SNNPR and other belg-dependant areas
- Above average 2011 main “meher” season cereal production is estimated
- Cereal prices in an unseasonable upward trend since last February
- Estimated number of people in need of food assistance decline from 4.6 to 3.2 million
- Number of refugees, mainly from Somalia, reached record level of 300 000 people at the end of January 2012

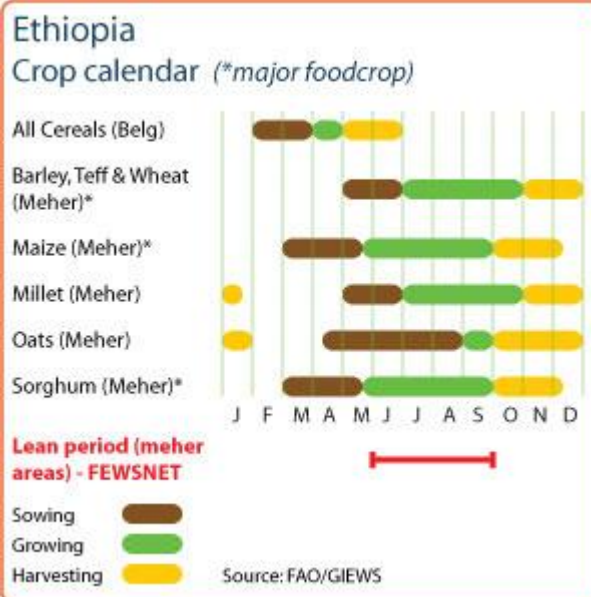
Concerns for late onset of 2012 “belg” rains

The start of the 2012 “belg” (mid-February to May) rains is between two and four weeks late, causing significant delay in planting operations of “belg” crops. In some areas of North and South Wollo zones of Amhara region have begun to dry plant using residual moisture from the past main season “kiremt” rains. In all belg-dependant areas of SNNPR, southern Tigray, eastern Amhara and central/eastern Oromia, even if rains improve from mid-April as forecast, the early moisture stress is likely to have a negative impact on yields of cereal crops to be harvested from June. In particular, in Gamu Gofa, Wolayta, Hadiya and Kembata zones of SNNPR, sweet potatoes, a very important crop during the March to May lean season, are about to be harvested and production prospects are not favourable due the delayed onset of the “belg” rains coupled with low availability of seedlings at planting time and poor “sapie” rains in December/January.

Favourable outturn of the main “meher” season cereal harvest in 2011

Harvesting of 2011 “meher” season crops is completed at the end of last year and cereal production is estimated at well above the last five year average. Good rains during the season, especially in main crop growing areas of western Amhara, western Oromiya and south-western parts of SNNPR have contributed to the favourable outcome. In some areas of Tigray, eastern Amhara and south-eastern Oromiya, rain onset was late by 2 to 3 weeks, but subsequent favourable rains throughout the season were compensatory in most cases. Unexpected late rains during the last dekad of November had some negative effect on harvesting of teff and wheat, but were beneficial for improved yields of late sown crops, which were at vegetative stage in highlands, and for pasture and grazing resources.

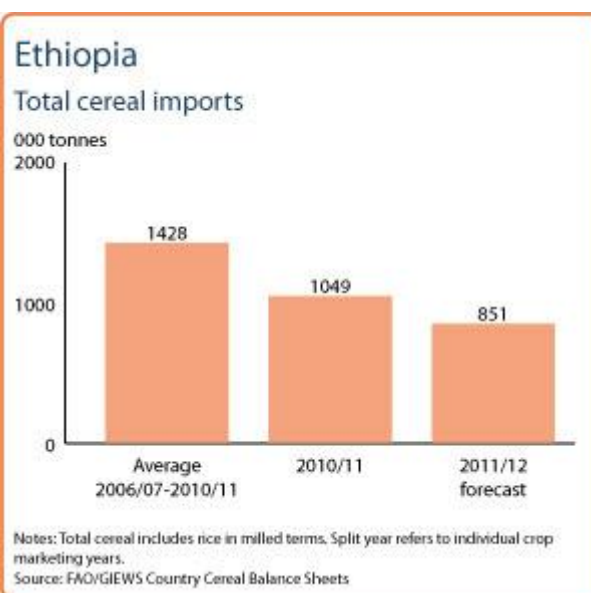
Assuming an average production from the secondary “belg” season crops, to be harvested from June, the 2011/12 cereal output is put at a record 20.7 million tonnes. Cereal import requirements in the 2012 (January/December) marketing year are forecast at about 850 000 tonnes, mainly wheat. On the other hand, a coarse grains (teff, maize, sorghum) surplus is forecast from the good “meher” season production that may partly be used for local purchases for food assistance and/or exports.



Ethiopia Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	4 680	5 796	6 375	10
Cereals nes	3 074	3 539	3 850	9
Sorghum	3 042	4 149	4 133	0
Others	5 155	5 737	6 321	10
Total	15 951	19 221	20 679	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Grazing resources in most drought-affected areas improved due to good secondary season rains

In most parts of southern and south-eastern pastoral and agro-pastoral areas, the 2011 secondary season “deyr/hageya” rains (October to December) were favourable, improving availability of pasture and water for livestock following two consecutive dry seasons. Rains were particularly beneficial in southern Somali region, in the lowlands of Oromia region (Borena, Guji and Bale zones) and in South Omo zone of SNNPR where pasture is expected to last until the start of the next rainy season in April. In contrast, localized water and pasture shortages are being reported in some *woredas* in southern lowlands of the Somali region and in East and West Hararghe zones of Oromia region that experienced limited or no “deyr” rains. In these areas, livestock migrations toward dry grazing lands started earlier than usual and high concentration of animals in limited areas has caused early depletion of grazing resources.

In areas of northeastern Afar and northern Somali region, that already received poor “karma/karran” rains from July to September, the long “jilal” dry season (October-March) has significantly affected livestock body conditions and milk production, but the situation is expected to improve with the beginning of the next “gu/ganna/sugum” rainy season in April.

Unseasonable increase in food prices

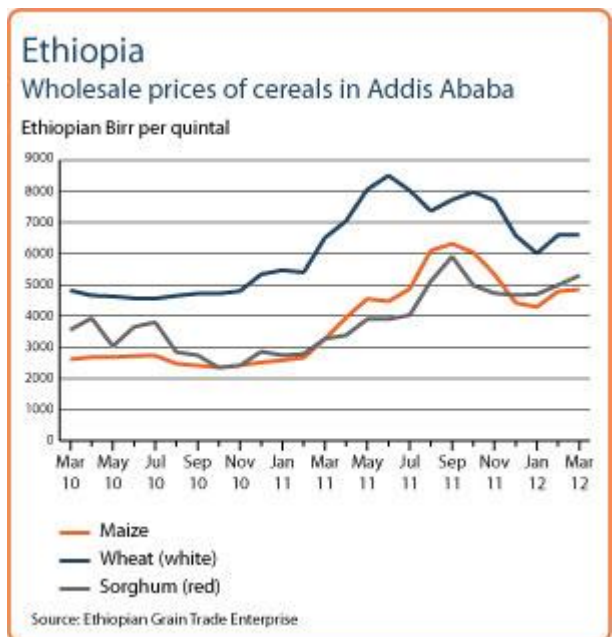
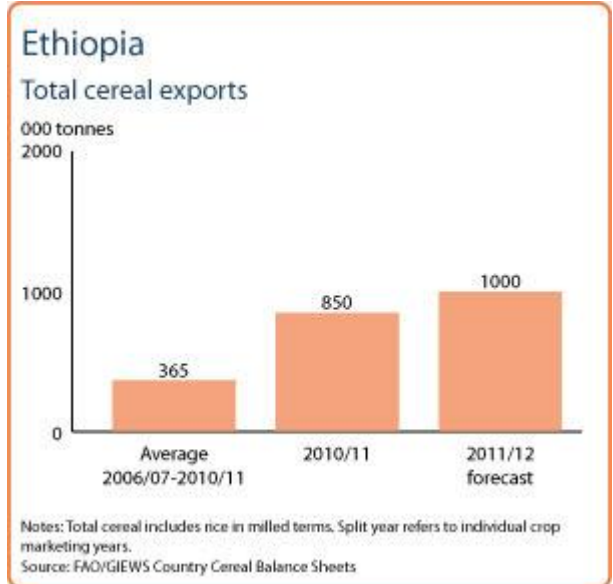
Cereal prices have significantly increased during the first three quarters of 2011 in most markets followed by a decline until January 2012 as harvesting of “meher” crops were progressing in main producing areas. However, since February 2012, wholesale cereal prices started to climb again, with an average increase of about 10-18 percent in less than two months. The forecast of a likely below-average “belg” rainy season may partly explain the unseasonable increase in cereal prices affecting the marketing strategies of farmers and traders.

In Addis Ababa, wholesale prices of maize and red sorghum, currently at ETB 485 and 530 per 100 kg, are respectively about 50 and 60 percent above a year earlier. On the other hand, wholesale prices of wheat are similar to one year ago partly in response to declining international prices and the sale of the imported 300 000 tonnes of wheat at subsidized prices as part of the Government’s market stabilization programme. Wholesale prices of teff remained stable at high levels since June 2011 and reached record ETB 1000 per 100 kg in March 2012.

Food security improves but remains precarious

Food security conditions have generally improved following the positive performance of the “meher” harvest, the reduction in prices and the good “deyr” rains in most drought-affected areas. Based on the results of the Government-led multi-agency emergency needs assessment concluded in February 2012, the estimated number of people in need of food assistance in the first half of 2012 decreased from 4.6 to 3.2 million. Most food insecure households are located in Somali region, eastern Oromia, eastern SNNPR, eastern Amhara, and northern Afar. The poor forecast of seasonal rains together with the unseasonable increase in staple crops are casues for serious concern and may lead to an upward revision of the number of vulnerable people in need of assistance.

The total number of refugees in Ethiopia has reached approximately 300 000 people, two-thirds of them from Somalia plus about 26 300



Sudanese that fled the conflict in the Blue Nile State since the beginning of September 2011 and about 29 000 Kenyans that recently arrived following the conflict between the Borana and Gabra communities in Moyale in northern Kenya. At the end of January 2012, there were an estimated 143 600 people residing in the Dollo Ado camp in the Somali region, with approximately one third of children categorised as severely malnourished.

Reference Date: 22-March-2012

FOOD SECURITY SNAPSHOT

- Above average 2011 main “meher” season cereal production is estimated
- Good secondary rains in pastoral areas during October to December improved livestock conditions in most drought-affected areas
- Cereal prices in an unseasonable upward trend since last February
- Estimated number of people in need of food assistance decline from 4.6 to 3.2 million
- Number of refugees, mainly from Somalia, reached record level of 300 000 people at the end of January 2012

The 2012 secondary “belg” cropping season is about to start in mainly highland areas

Land preparation of “belg” season crops is underway in main “belg” producing areas. The onset of “belg” rains is somewhat late and farmers in some areas of North and South Wollo zones of Amhara region have begun to dry plant using residual moisture from the past main season “kiremt” rains. In Gamu Gofa, Wolayta, Hadiya and Kembata zone of SNNPR, sweet potatoes are at vegetative stage and production prospects are not favourable due to low availability of planting material, poor “sapie” rains in December/January and a delayed start of the “belg” rains.

Favourable outturn of the main “meher” season cereal harvest in 2011

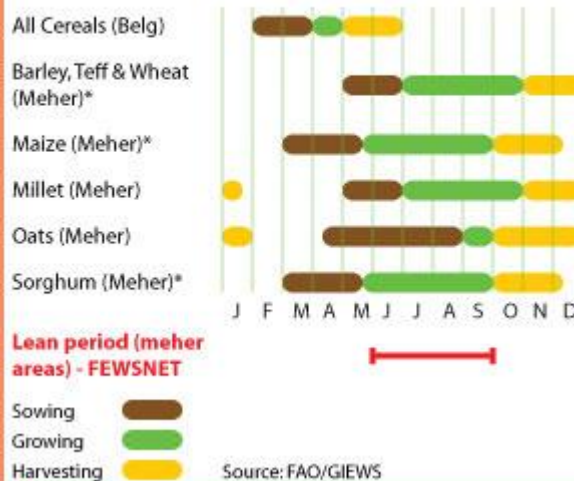
Harvesting of 2011 “meher” season crops is completed at the end of last year and cereal production is estimated at well above the last five year average. Good rains during the season, especially in main crop growing areas of western Amhara, western Oromiya and south-western parts of SNNPR have contributed to the favourable outcome. In some areas of Tigray, eastern Amhara and south-eastern Oromiya, rain onset was late by 2 to 3 weeks, but subsequent favourable rains throughout the season were compensatory in most cases. Unexpected late rains during the last dekad of November had some negative effect on harvesting of teff and wheat, but were beneficial for improved yields of late sown crops, which were at vegetative stage in highlands, and for pasture and grazing resources.

Assuming an average production from the secondary “belg” season crops, to be harvested from June, the 2011/12 cereal output is put at a record 20.7 million tonnes. Cereal import requirements in the 2012 (January/December) marketing year are forecast at about 850 000 tonnes, mainly wheat. On the other hand, a coarse grains (teff, maize, sorghum) surplus is forecast from the good “meher” season production that may partly be used for local purchases for food assistance and/or exports.

Grazing resources in most drought-affected areas improved due to good secondary season rains

Ethiopia

Crop calendar (*major foodcrop)



Ethiopia

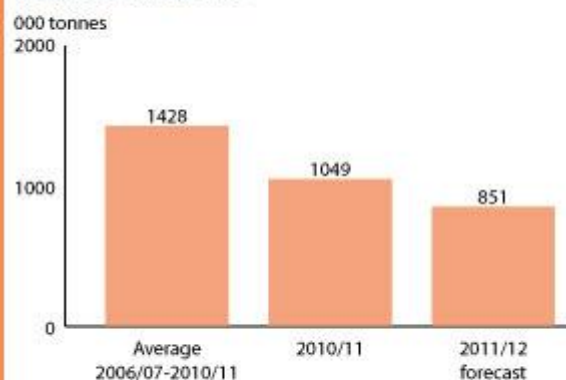
Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	4 680	5 796	6 375	10
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Sorghum	3 042	4 149	4 133	0
Others	5 155	5 737	6 321	10
Total	15 951	19 221	20 679	8

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

In most parts of southern and south-eastern pastoral and agro-pastoral areas, the 2011 secondary season “deyr/hageya” rains (October to December) were favourable, improving availability of pasture and water for livestock following two consecutive dry seasons. Rains were particularly beneficial in southern Somali region, in the lowlands of Oromia region (Borena, Guji and Bale zones) and in South Omo zone of SNNPR where pasture is expected to last until the start of the next rainy season in April. In contrast, localized water and pasture shortages are being reported in some *woredas* in southern lowlands of the Somali region and in East and West Hararghe zones of Oromia region that experienced limited or no “deyr” rains. In these areas, livestock migrations toward dry grazing lands started earlier than usual and high concentration of animals in limited areas has caused early depletion of grazing resources.

In areas of northeastern Afar and northern Somali region, that already received poor “karma/karran” rains from July to September, the long “jilal” dry season (October-March) has significantly affected livestock body conditions and milk production, but the situation is expected to improve with the beginning of the next “gu/ganna/sugum” rainy season in April.

Unseasonable increase in food prices

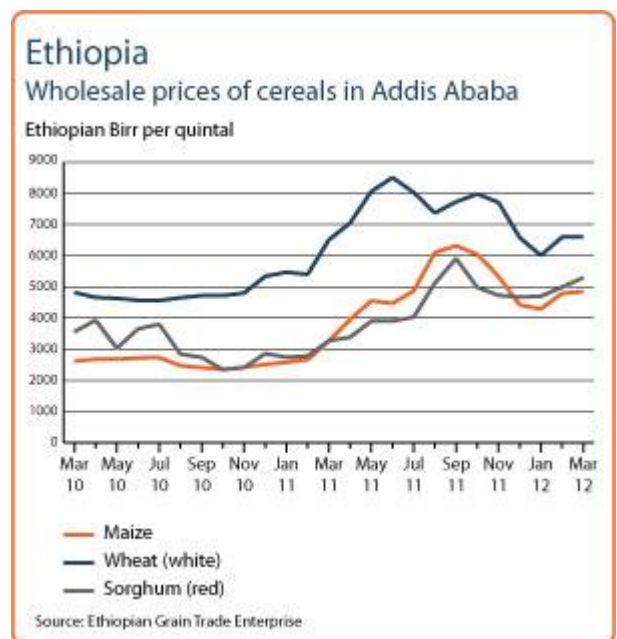
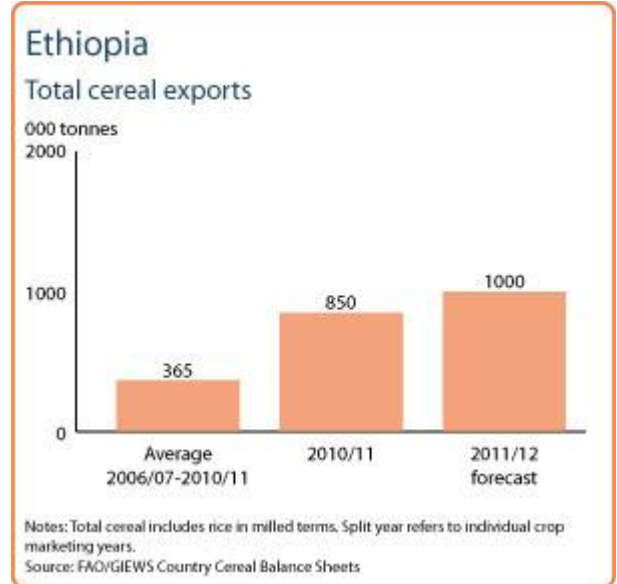
Cereal prices have significantly increased during the first three quarters of 2011 in most markets followed by a decline until January 2012 as harvesting of “meher” crops were progressing in main producing areas. However, since February 2012, wholesale cereal prices started to climb again, with an average increase of about 10-18 percent in less than two months. The recent forecast of a below-average “belg” rainy season is postulated to partly explain the unseasonable increase in cereal prices impacting the selling strategies of farmers and traders.

In Addis Ababa, wholesale prices of maize and red sorghum, currently at ETB 485 and 530 per 100 kg, are respectively about 50 and 60 percent above a year earlier. On the other hand, wholesale prices of wheat are similar to one year ago partly in response to declining international prices and the sale of imported 300 000 tonnes of wheat at subsidized prices as part of the Government’s market stabilization programme. Wholesale prices of teff remained stable at high levels since June 2011 and reached record ETB 1000 per 100 kg in March 2012.

Food security improves but remains precarious

Food security conditions have generally improved following the positive performance of the “meher” harvest, the reduction in prices and the good “deyr” rains in most drought-affected areas. Based on the results of the Government-led multi-agency emergency needs assessment concluded in February 2012, the estimated number of people in need of food assistance in the first half of 2012 decreased from 4.6 to 3.2 million. Most food insecure households are located in Somali region, eastern Oromia, eastern SNNPR, eastern Amhara, and northern Afar. The poor forecast of seasonal rains together with the unseasonable increase in staple crops are casues for serious concern and may lead to an upward revision of the number of vulnerable people in need of assistance.

The total number of refugees in Ethiopia has reached approximately 300 000 people, two-thirds of them from Somalia plus about 26 300 Sudanese that fled the conflict in the Blue Nile State since the beginning of September 2011 and about 29 000 Kenyans that recently arrived following the conflict between the Borana and Gabra communities in Moyale in northern Kenya. At the end of January 2012,



there were an estimated 143 600 people residing in the Dollo Ado camp in the Somali region, with approximately one third of children categorised as severely malnourished.

Reference Date: 17-January-2012

FOOD SECURITY SNAPSHOT

- Above average 2011 main “meher” season cereal production is forecast
- Good secondary “deyr” rains improve pasture in drought-affected areas
- Cereal prices decline but year-on-year food inflation rates are still high at 35 percent in December 2011
- Number of refugees in Ethiopia, mainly from Somalia, remains at record 260 000 people

Favourable outturn of the main “meher” season cereal harvest

Harvesting of 2011 “meher” season crops is almost complete. Good rains during the season, especially in main crop growing areas of western Amhara, western Oromiya and south-western parts of SNNPR have contributed to the optimistic forecast. In some areas of Tigray, eastern Amhara and south-eastern Oromiya, rain onset was late by 2 to 3 weeks, but subsequent favourable rains throughout the season were compensatory in most cases. Unexpected late rains during the last dekad of November had some negative effect on harvesting teff and wheat, but improved yields of late sown crops which were at vegetative stage in highlands and were favourable for grazing resources.

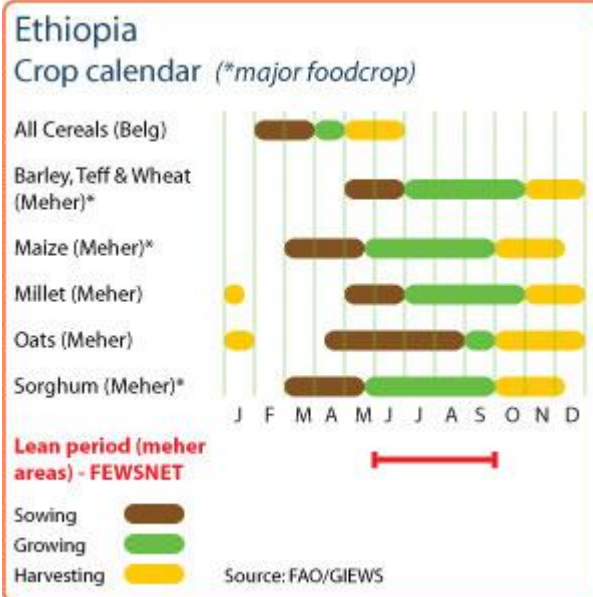
A report from an FAO/WFP Crop and Food Security Assessment Mission (CFSAM) which visited the country in November/December 2011, is expected to be issued soon.

Grazing resources in drought-affected areas improve due to good “deyr” rains

In most parts of southern and south-eastern pastoral and agro-pastoral areas, 2011 “deyr/hageya” rains (October to December) were generally favourable, improving availability of pasture and water for livestock following two consecutive dry seasons. Water trucking has been discontinued in all areas of Somali region that have been affected by the drought in 2011. Heavy rains in November and December caused floods in Gode, Afdher and Koraha zones in Somali region, with localized losses of crops and animals. By contrast, the long dry season continues in Afar Region and northern zones of the Somali region affecting negatively the livestock conditions. The situation is not expected to improve until March when the next rainy season is expected to start.

Food prices decline but remain at high levels

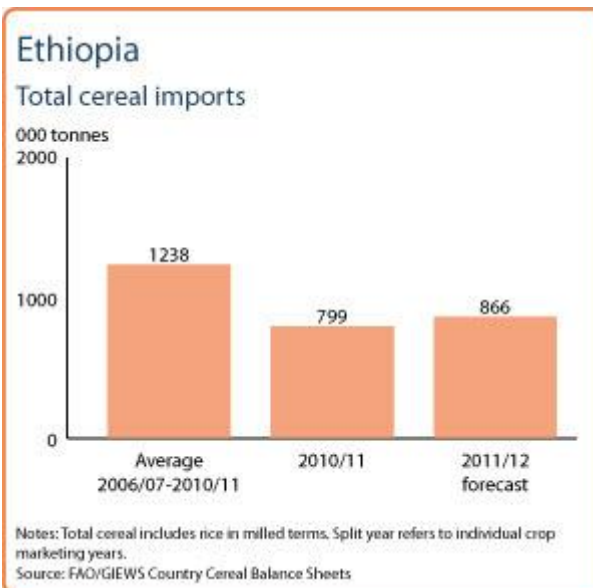
Prices of maize declined from their peak in September 2011 as newly harvested crops from the 2011 main “meher” season harvest began reaching main markets. For instance in Addis Ababa and in Bahirdar (located in one of the main producing areas) maize prices decreased by some 30 and 23 percent, respectively. Similarly, red sorghum prices in Addis Ababa decreased between September and December by 21 percent, while prices of wheat, an important staple and partially imported, declined between August and December by 23 percent. However, despite the recent declines, cereal prices are still high and



Ethiopia Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Maize	4 680	5 796	6 375	10
Cereals nes	3 074	3 539	3 850	9
Sorghum	3 042	4 149	4 133	0
Others	5 155	5 737	6 321	10
Total	15 951	19 221	20 679	8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



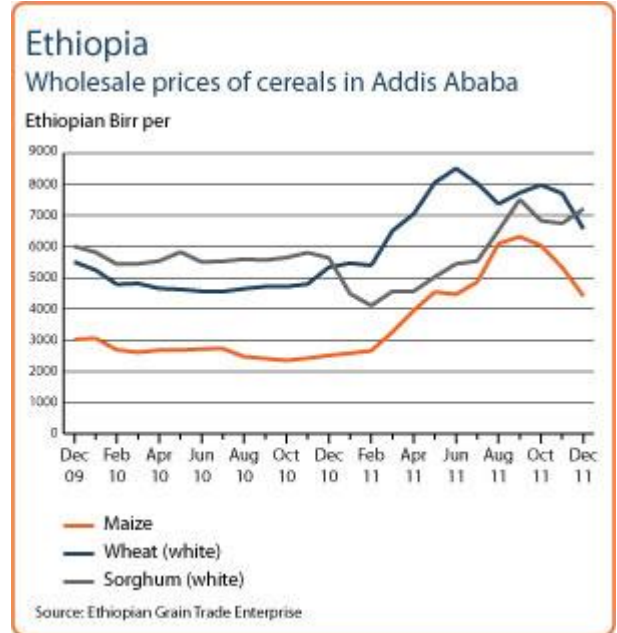
are well above their levels a year earlier. For example, in Addis Ababa, prices of maize, red sorghum and wheat were respectively higher in December 2011 by 76, 63 and 23 percent, respectively, than in December 2010. The trend in food prices is reflected by the general year-on-year inflation rate, which peaked in August 2011 at 40.6 percent and declined in the following months, averaging 35.9 percent in December.

Food security improves

For the period from July to December 2011, the number of people in need of emergency food assistance was estimated at 4.6 million persons, mostly located in southern and south-western parts of the country. Currently food security conditions have generally improved following the positive performance of the “meher” harvest, the recent reduction in prices and the good “deyr” rains in drought-affected areas. New official figures of the number of people in need of assistance is expected to be released in the next few weeks as results from the recent Government-led multi-agency emergency needs assessment become available.

Despite the generally positive outlook, food security conditions are expected to be precarious especially in most southern pastoral areas bordering Kenya and Somalia and in northern and north-eastern Afar.

Although the influx of refugees from Somalia has significantly declined since August, the total number of refugees in Ethiopia has reached approximately 260 000 people, including 23 000 Sudanese people Beneshangul Gumuz region that fled the recent conflict in the Blue Nile State since the beginning of September 2011. As of December 21, there were an estimated 141 100 people residing in the Dollo Ado camp in the Somali region, with approximately one third of children categorised as severely malnourished.



Reference Date: 21-September-2011

FOOD SECURITY SNAPSHOT

- Prolonged drought during the main rainy season in pastoralist areas of south and south-east result in serious damage to lives and livelihoods
- Favourable outlook of *meher* crops in main growing areas, while water deficits persist in central, eastern and northern areas
- Cereal prices continue to rise and year-on-year food inflation rates jumping to nearly 50 percent in August 2011
- Estimated number of people in need of relief food assistance increases from 3.2 million in May to 4.6 million in August 2011
- Number of refugees in Ethiopia, mainly Somali, estimated at record 260 000 people

Increased number of people in need of urgent humanitarian assistance

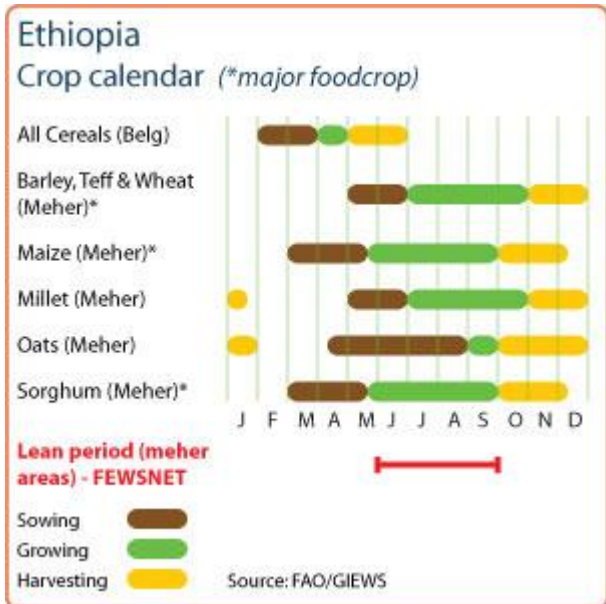
Following the failure and/or significant drop in *belg* production, the number of people in need of immediate food assistance has been revised upwards to 4.6 million persons, with the majority located in Oromia and Somali regions, for the period from July to December 2011. The low availability of critical food staples during the lean season, such as sweet potatoes, as well as the continuing high prices of basic food items have contributed to the deterioration of food insecurity conditions, especially in areas that are heavily dependent on *belg* harvest in SNNPR and eastern and central parts of Oromia. As of September 13, there were an estimated 122 800 people residing in the Dollo Ado camp in the Somali region, with approximately one third of children categorised as severely malnourished. Although the influx of refugees from Somalia has significantly declined in August, the total number of refugees located throughout Ethiopia has reached approximately 260 000 people, including 20 000 Sudanese people that fled the conflict in the Blue Nile State at the beginning of September.

High food and fuel prices exacerbate food insecurity

Prices of cereals, which were at relatively low levels until January 2011 following a good 2010 main season harvest, increased sharply from February onwards. Prices of maize rose markedly in both surplus (Bahirdar) and deficit markets (Direidawa, Addis Ababa) from February to September 2011 (between 78 and 95 percent). Prices of wheat and mixed teff increased in Addis Ababa market during the same period by 40 and 38 percent respectively. However, having reached record levels in June 2011, above the threshold of USD 500 per tonne, wheat prices declined slightly in July and have remained quite stable so far.

Livestock prices began to decline following the drought conditions in several pastoralist areas, especially in the south and south-eastern parts of the country, worsening terms of trade for pastoralists. In addition, the recent unrest in Middle East and North African countries has caused a temporary decline in export demand for cattle.

The general year-on-year inflation rate for August 2011 has increased

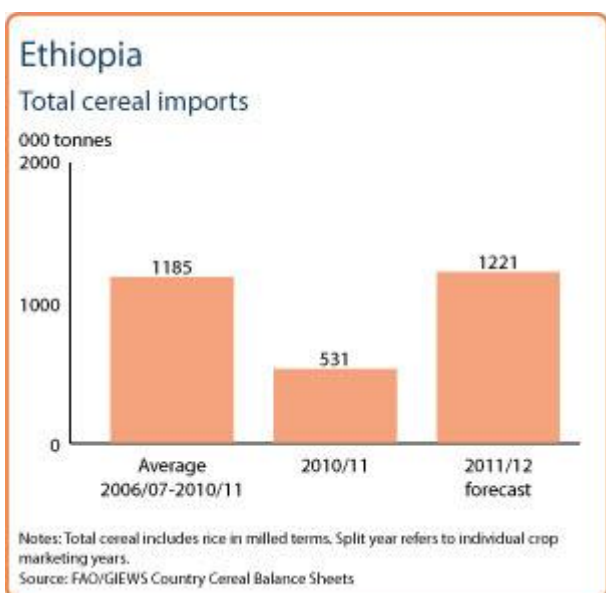


Ethiopia

Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	4 424	4 800	4 400	-8
Cereals nes	3 061	3 502	3 300	-6
Sorghum	2 906	3 500	2 700	-23
Others	5 132	5 679	5 123	-10
Total	15 523	17 481	15 523	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

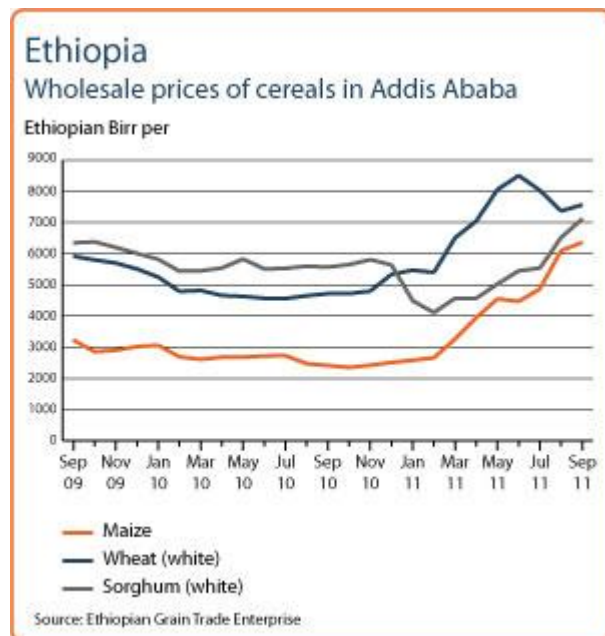


to 40.6 percent. The rise is mainly due to the increases in food prices. Food inflation has increased by 49.9 percent in August 2011 compared to the same period in 2010. The year-on-year increase of the price index for cereals was 52.3 percent in August 2011 and contributed significantly to the overall rise in inflation. The high fuel prices (in Addis Ababa diesel prices in June were 60 percent up on a year earlier) and the devaluation of the country's currency against the US dollar (25 percent from August 2010 to August 2011) are also contributing factors.

Early forecast indicate average 2011 “meher” cereal production

Harvesting of 2011 “meher” season cereal crops is expected to start in October and will continue up to the beginning of next year. Crop prospects are generally favourable in main producing areas following good rainfall performance. In these areas, normal to above normal rains are forecast until the end of the year, with some risks of flooding in lowland plains and river bank areas. However, there are concerns about crop development in eastern, central and northern areas, where “meher” rains started three-four weeks late and were below average in August-September. In addition, the unsatisfactory 2011 “belg” rains often affected planting of long-cycle crops (such as maize and sorghum) and farmers decided to opt for short-cycle crops (such as wheat, barley and teff) with lower yields.

In drought affected pastoral and agro-pastoral areas of the south and south-eastern regions, the current dry season has exacerbated poor pasture conditions and water shortages, resulting in lower livestock production and deterioration in body conditions, with a subsequent negative impact on prices. Animals are unusually concentrated around riverbanks, increasing risks of resource-base conflicts and disease outbreaks. The food security conditions in these areas are critical and are expected to gradually improve with the start of the 2011 “deyr” rains in October.



Reference Date: 28-July-2011

FOOD SECURITY SNAPSHOT

- Prolonged drought during the main rainy season in pastoralist areas of south and south-east result in serious damage to lives and livelihoods
- Dry weather conditions have also seriously affected 2011 secondary *belg* crops in central and northern cropping areas
- However, the relatively good start of the main *meher* rains has supported cropping activities in central and northern areas
- Cereal prices continue to rise with year-on-year inflation rates jumping to nearly 39 percent in June 2011
- Estimated number of people in need of relief food assistance increases from 3.2 million in May to 4.5 million in July 2011

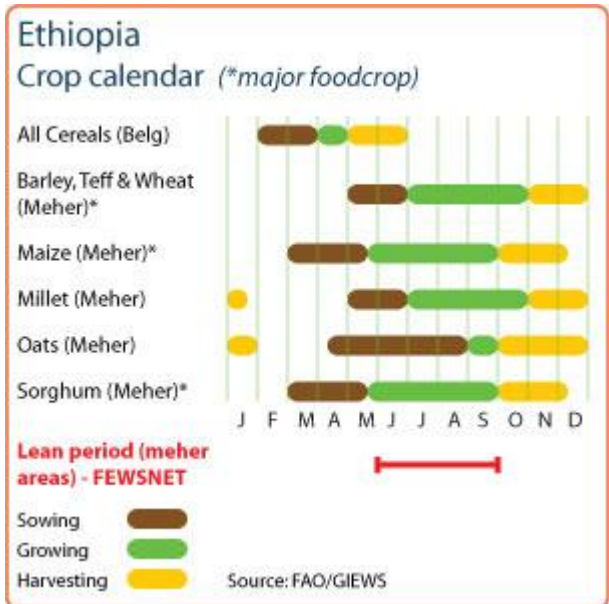
Increased number of people in need of urgent humanitarian assistance

Following the failure and/or significant drop in *belg* production, the number of people in need of immediate food assistance has been revised upwards to 4.5 million persons, with the majority located in Oromia and Somali regions, for the period from July to December 2011. A total of 450 708 tonnes of food is required to cover the deficit of the affected households. The low availability of critical food staples during the lean season, such as sweet potatoes, as well as the continuing high prices of basic food items have combined to contribute to the deterioration of food insecurity conditions, with areas that are heavily dependent on *belg* harvest in SNNPR and eastern and central parts of Oromia of particular concern. However, the delayed *belg* harvest could provide some relief in August/September, but prospect still remain uncertain, as the onset of *meher* rains could impact harvesting activities. As of July 24 there were an estimated 114 603 people residing in the Dollo Ado camp in the Somali region, with approximately one third of children categorised as severely malnourished. The arrival rate has slowed down in the last month, however, in total approximately 230 000 refugees are currently located throughout Ethiopia. Food distributions are ongoing, but delays have been experienced in the Somali region due to insecurity problems.

High food and fuel prices exacerbate the food problem

Prices of cereals, which were at relatively low levels until January 2011 following a good 2010 main season harvest, increased sharply from February onwards. Prices of maize rose markedly in both surplus (Bahirdar) and deficit markets (Direwawa, Addis Ababa) from February to July 2011 (between 73 and 142 percent). Prices of wheat and mixed teff increased in Addis Ababa market during the same period by 53 and 34 percent respectively. However, having reached record levels in June 2011, wheat prices declined slightly in July.

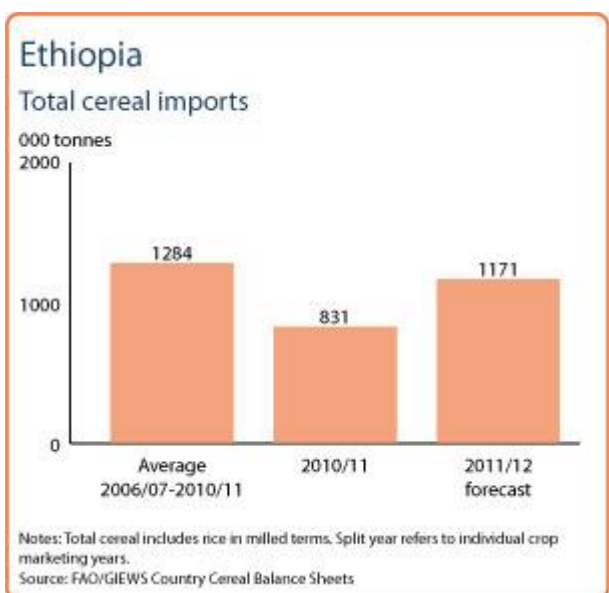
Livestock prices began to decline following the drought conditions in several pastoralist areas, especially in the south and south-eastern parts of the country, worsening terms of trade for pastoralists. In addition, the recent unrest in Middle East and North African countries has caused a temporary decline in export demand for cattle. Prices of



Ethiopia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	4 424	4 800	4 600	-4
Cereals nes	3 057	3 480	3 300	-5
Wheat	2 772	2 987	2 700	-10
Others	6 164	7 143	6 673	-7
Total	15 113	16 853	15 823	-6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



milk have increased sharply in Somali region by up to 150 percent from May 2010 to May 2011.

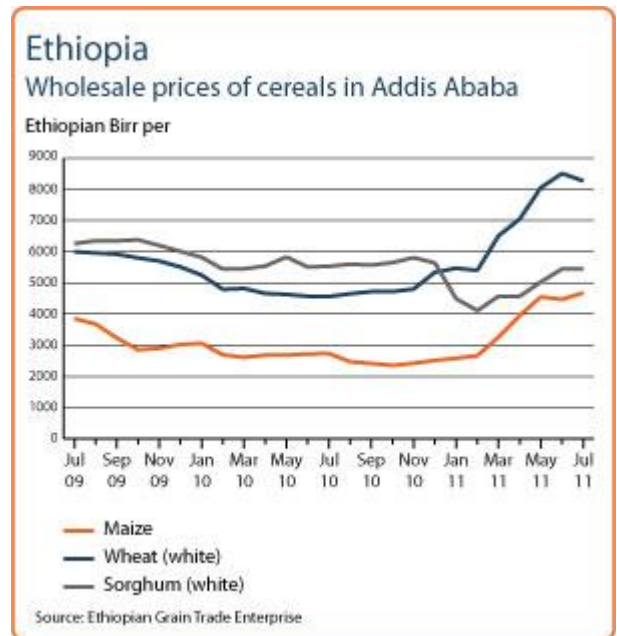
The general year-on-year inflation rate for June 2011 has increased to 38.9 percent. The rise is mainly due to the increases in food prices. Food inflation has increased by 45.3 percent in June 2011 compared to the same period in 2010. The year-on-year increase of the price index for cereals was 33.4 percent in June 2011 and contributed significantly to the overall rise in inflation. The high fuel prices (in Addis Ababa diesel prices in May were 60 percent up on a year earlier) and the devaluation of the country's currency, "birr", against the US dollar (25 percent from June 2010 to June 2011) are also contributing factors.

Outlook of the main meher cropping season improve following good rains

Prospects for the main meher season crops for harvest later in the year have improved significantly in the main producing areas following good rainfall performance. Forecasts point to normal to above normal rains for most of the country, with the exception of SNNPR, southern Oromia and eastern parts of the country. During June and July 2011 favourable rains have been received in southern parts of Amhara and northern and western areas of Oromia, supporting cropping activities. By contrast, despite heavy rains during mid-July, seasonal cumulative rainfall levels point to slight deficits in northern areas of the country. Given the likely occurrence of normal to above normal rains, flooding is anticipated in flood prone areas, particularly in western, northwestern and central parts of the country. Lowland plains and river bank areas are most susceptible to flooding during the peak of the meher rainy season in July/August.

As a result of the late start of the belg rains, harvesting is expected to be delayed by one to two months. Crop production is anticipated to be poor, on account of low productivity and a smaller cultivated area. In addition, the current meher rains are likely to have a negative impact on harvesting activities, which could further suppress production, particularly affecting the major belg cropping areas in Amhara, Oromia, SNNPR and Tigray.

The start of meher and the karma/karan rains will support a recovery in rangeland in central and northern areas; however, in the drought affected areas of the south and southeastern regions of the country, the onset of the dry season will further exacerbate poor pasture conditions and water shortages, resulting in lower livestock production and deterioration in body conditions, with a subsequent negative impact on prices. The food security conditions in pastoral and agro-pastoral areas in the south and southeastern areas are critical, and water availability is only expected to improve in October with the start of the 2011 deyr rains.



Reference Date: 26-May-2011

FOOD SECURITY SNAPSHOT

- Prolonged drought during the main rainy season in pastoralist areas of south and south-east Ethiopia has severely affected food security
- The secondary “belg” crop producing areas were also affected by dry weather
- Cereal prices continue to rise with inflation rates jumping to nearly 30 percent in April 2011
- Estimated number of people in need of emergency food assistance increases to 3.2 million

Late and poor “gu/belg” rains affects several areas

The 2011 “gu/genna/sugum” rains started late at the end of April, with a delay between four and eight weeks, and have been erratic to date, with many areas receiving less than 50 percent of total amount of rain if compared to long-term average. Despite some recent localized improvements, critical shortages of water and forage are reported in pastoral and agro-pastoral areas of south and south-eastern lowlands, including parts of Somali, SNNPR, lowlands areas of Oromia, eastern and southern Tigray and northern Afar. Most of these areas have also experienced a very poor “deyr/hageya” rains from October to December 2010 and, consequently, livestock body conditions have further deteriorated, with high mortality rates and diminished production of milk.

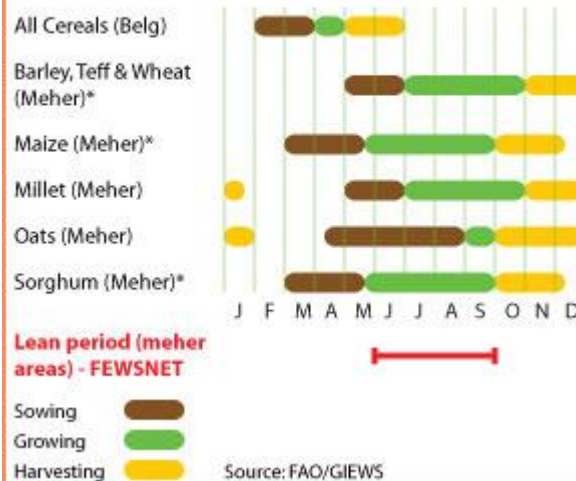
In major “belg” cropping areas in Ahmara, Oromia SNNPR and Tigray, the 2011 “belg” short-rains were late by more than six weeks and poorly distributed. An early multi-agency “belg” assessment has just been carried out and, although its results are not yet available, crop production is likely to be very poor. In particular, inadequate moisture has led to a near total failure of sweet potato production in central and eastern SNNPR, where the crop is crucial for local food security during the lean season from early March until the “belg” harvest in May/June. Damages to flowering coffee plantations, an important cash crop, are also being reported.

The unfavourable “belg” rains have also affected land preparation and planting of long cycle “meher” crops, such as maize, sorghum and millet, especially in the lowlands, while in many areas of Tigray and Amhara regions farmers have switched to planting short cycle varieties. The situation may improve in some areas as meteorological forecast indicates that “kiremt” rains (June to September) may be favourable.

Cereal prices on the rise since February

Prices of cereals, which were at relatively low levels until January 2011 following a good 2010 main season harvest, increased sharply from February onwards. Prices of maize rose markedly in both surplus (Bahirdar) and deficit markets (Direadawa, Mekele, Addis Ababa) from February to May 2011 (between 60 and 117 percent). Prices of wheat and mixed teff followed the same trend and, in Addis Ababa market, between February and May 2011, their prices increased by 35 and 20 percent respectively.

Ethiopia Crop calendar (*major foodcrop)



Ethiopia

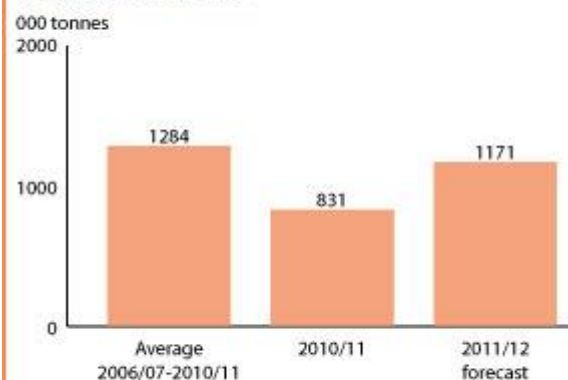
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	4 424	4 800	4 600	-4
Cereals nes	3 057	3 480	3 300	-5
Wheat	2 772	2 987	2 700	-10
Others	6 164	7 143	6 673	-7
Total	15 113	16 853	15 823	-6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Total cereal imports

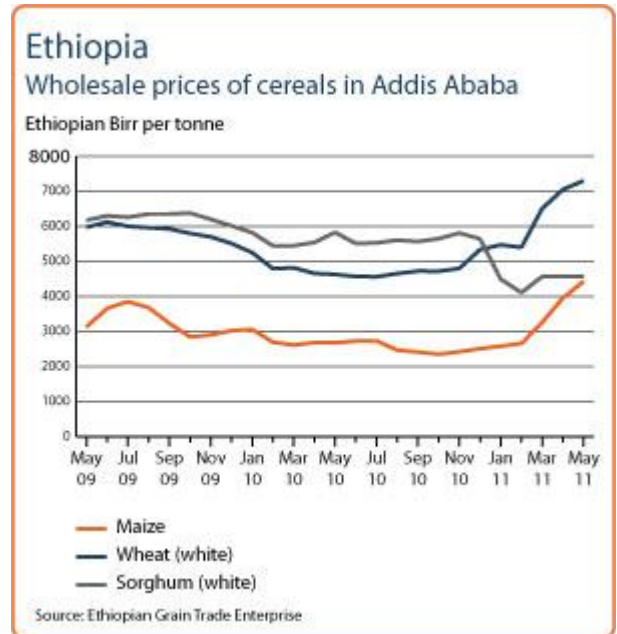


Livestock prices began to decline following the drought conditions in several pastoralist areas worsening of terms of trade for pastoralists. In addition, the recent unrest in Middle East and North African countries has caused a temporary decline in export demand for cattle.

The general year-on-year inflation rate for April 2011 has increased to 29.5 percent. The rise is mainly due to the rise in food prices. Food inflation has increased by 32.2 percent in April 2011 compared to the same period in 2010. The year-on-year increase of the price index for cereals was 14.6 percent in April 2011 and contributed significantly to the overall rise in inflation. The high fuel prices and the devaluation of the country's currency "birr" against the US dollar are also contributing factors.

Increasing number of people in need of emergency assistance

At the beginning of April 2011, recognizing the severity of drought conditions in southern and south-eastern areas, the estimated number of people in need of emergency food and non-food assistance was revised upwards from 2.8 million to 3.2 million. Almost two thirds of the requirements are concentrated in southern Somali region and in the lowlands of Oromia and southern SNNPR. As cereal stocks from the good 2010 "meher" season harvest is gradually depleted, the overall food security situation is expected to deteriorate in coming months. A poor outcome of the 2011 "belg" harvest would extend the lean season to the next main "meher" season harvest in the last quarter of this year.



Reference Date: 12-January-2011

FOOD SECURITY SNAPSHOT

- Record production for 2010 “meher” season
- Dry weather conditions are affecting pastoralists in southern and south-eastern area
- Estimated number of people in need of emergency food assistance decreases to 2.3 million

Record cereal production for 2010 “meher” season

Harvesting of 2010 main season “meher” crop is almost complete. Official sources estimate a record cereal production of 17.2 million tonnes from small-scale farmers, plus 700 000 tonnes from commercial farms. This result is due to above average precipitations, especially in key growing areas of western and central Oromia, western Amhara, northern SNNPR and eastern Benishangul-Gumuz regions, which induced farmers to increase the planted area and led to improved yields. In particular, coarse grain production is estimated to increase by about 25 percent when compared to previous year. By contrast, wheat and barley production is expected to contract by about 10 percent to due to losses resulting from an outbreak of yellow rust, which was particularly severe in some north-eastern zones of SNNPR, in North Shewa zone in Oromia and in South Gondar zone in Amhara.

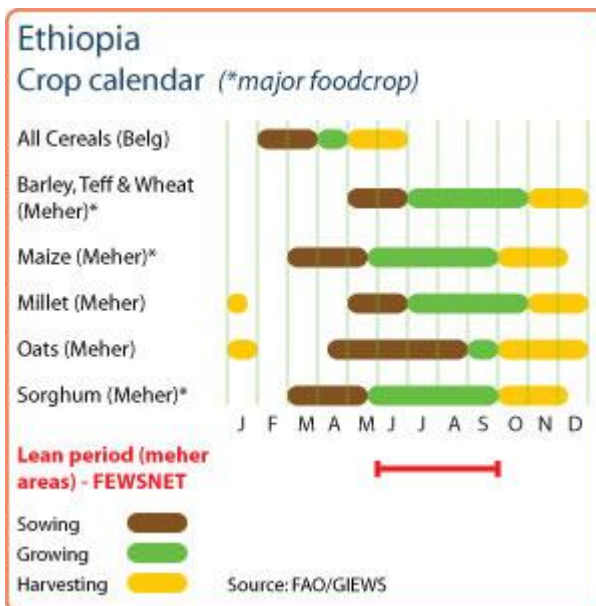
Assuming an average production of the “belg” season crops, to be planted by February, total 2010 cereal output is tentatively forecast at record level of 18.8 million tonnes. Given the abundant domestic cereal supplies, import requirements (mainly wheat) for 2011 marketing year (January/December) are forecast at a low of 476 000 tonnes, substantially less than previous years when cereal imports (including food aid) fluctuated between 1 and 1.2 million tonnes.

South and south-east affected by poor “deyr” rains

As a consequence of “La Niña” meteorological phenomenon, the 2010 “deyr” rainy season (October/December) started later than normal and was characterized by low cumulative rainfall levels and poor distribution in southern and south-eastern pastoral and agro-pastoral areas, namely in Somali region, South Omo, Konso and Derashe woredas in SNNPR as well as in Borena, Bale and Guji woredas in Oromia lowlands. Grazing conditions in these areas have gradually deteriorated, worsening livestock body conditions, negatively impacting milk production and increasing livestock movements in search of better pasture and water resources.

Wheat and sorghum prices increase at the end of 2010

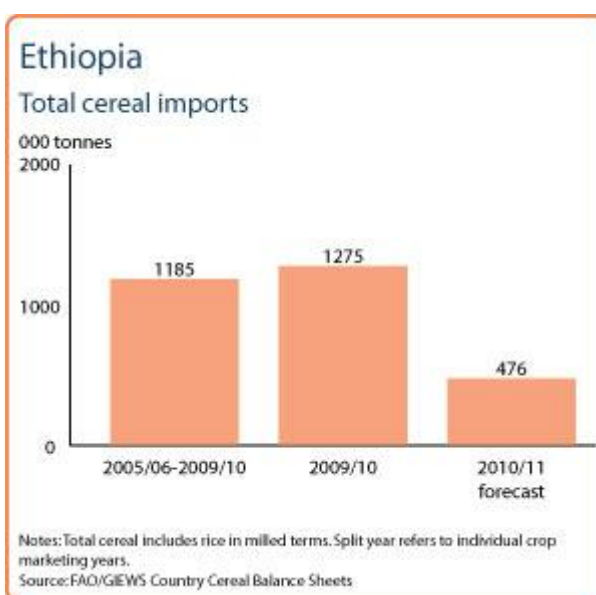
Wholesale price of wheat steadily declined from mid-2009 to mid-2010, in part as a consequence of the significant amount of imports procured by the government and sold in local markets at subsidized prices. However, during last six months, in Addis Ababa market wheat prices increased by 15 percent, reflecting both higher import prices due to the recent devaluation of local currency and the negative impact of domestic production short-falls, as a result of yellow rust infestation. In the same period, wholesale prices of maize and mixed teff have also



Ethiopia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	4246	4556	5671	24
Cereals nes	2811	3225	3480	8
Sorghum	2647	3150	3994	27
Others	4831	5962	5623	-6
Total	14535	16893	18768	11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

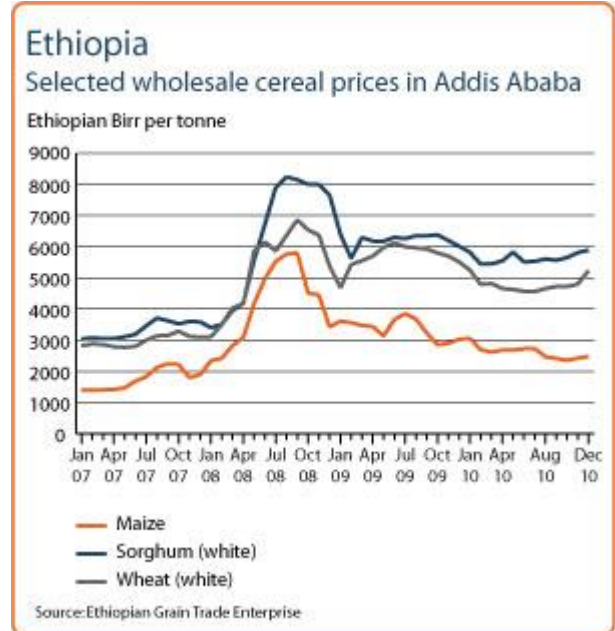


decreased by 9 and 6 percent, respectively, while the price of white sorghum rose by 7 percent.

Decreasing number of people in need of food assistance

The good performance of both the 2010 “belg” and “meher” seasons, coupled with an efficient safety net program, has improved food security conditions across the country. The number of people in need of emergency food assistance is currently estimated at 2.3 million, down from previous figure of 5.2 million. Most vulnerable households are concentrated in Somali region, Tigray and Oromia.

Food security conditions are expected to deteriorate further for pastoralists and agro-pastoralists in south-eastern areas affected by the “La Niña” phenomenon and no substantial improvement is expected to take place until the start of the “gu” rainy-season in March. In these areas, terms of trade for pastoralists are likely to further deteriorate, limiting households’ access to food.



Reference Date: 07-September-2010

FOOD SECURITY SNAPSHOT

- Good outturn for 2010 “belg” season crops and favourable prospects for current “meher” season
- Cereal prices are steady or declining, but still high compared to average
- An estimated 5.2 million people still depend on emergency food assistance

The secondary “belg” season cereal crop expected to be average

Harvesting of the 2010 secondary “belg” season crops is complete and early estimates point to an average harvest. Following intermittent rainfall in January that resulted in some initial planting failures, replanting in February was successful in most cropping areas and enhanced rains along the season have benefited yields. Late and erratic “belg” rains have affected crops in parts of Amhara and in the highlands of Tigray regions. In Somali region, the main “gu” season (April/June) rains have been abundant, with generally positive effects on water availability and pasture conditions leading to improved livestock body conditions and milk production.

Favourable prospects for 2010 “meher” season crops

Planting of 2010 main season “meher” crops has been completed in most barley, wheat and teff producing areas. After a slow start of the season in parts of Tigray, eastern Amhara and eastern Oromya regions, above average “kiremt” rains have significantly improved soil moisture conditions in key growing areas of western and central Oromya, western Amhara, northern SNNPR and eastern Benishangul-Gumuz regions. Good “karma” rains (July to September) are gradually improving pasture and water availability in northern agropastoral parts of Afar region that have been affected by below average “sugum” rains from March to May.

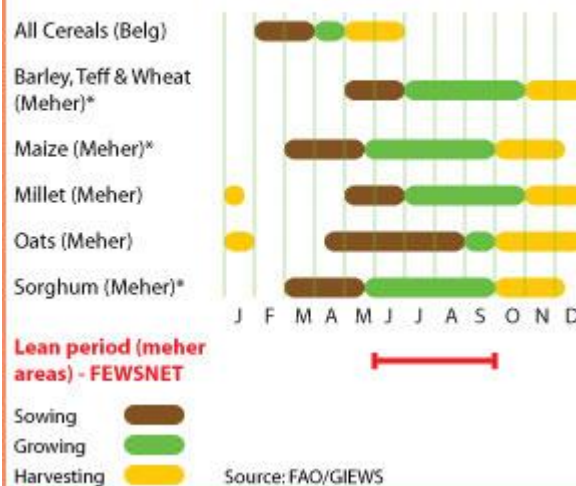
From mid-July, torrential rains have caused flooding in Tigray, Amhara, Afar, Oromiya, Somali and Gambella regions, with losses of assets, crops and livestock and raised concern of malaria outbreaks. Abundant precipitations in the highlands are forecast until the end of September and further flooding is likely in flood-prone areas. In some areas of Afar region, where floods were moderate, their recession is expected to benefit flood recession planting.

Cereal prices continue to decline from the record levels in mid-2008

Nationally, cereal prices have declined from their record levels, but still remain above pre-crisis levels of 2007. Wholesale price of maize has gradually declined from the September 2008 record level. In August 2010, maize was traded in Addis Ababa wholesale market at ETB 265 per 100 kg, about 54 percent lower than in September 2008. In the same period, wholesale prices of both white wheat and white sorghum also dropped by about 32 percent.

Ethiopia

Crop calendar (*major foodcrop)



Ethiopia

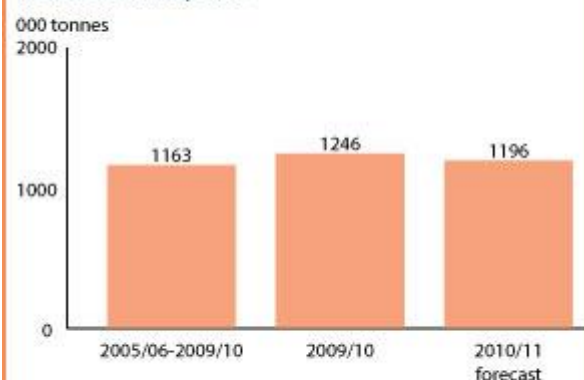
Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Maize	4276	4400	4400	0
Cereals nes	2814	3200	3000	-6
Sorghum	2650	3000	2900	-3
Others	4807	5570	5470	-2
Total	14547	16170	15770	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

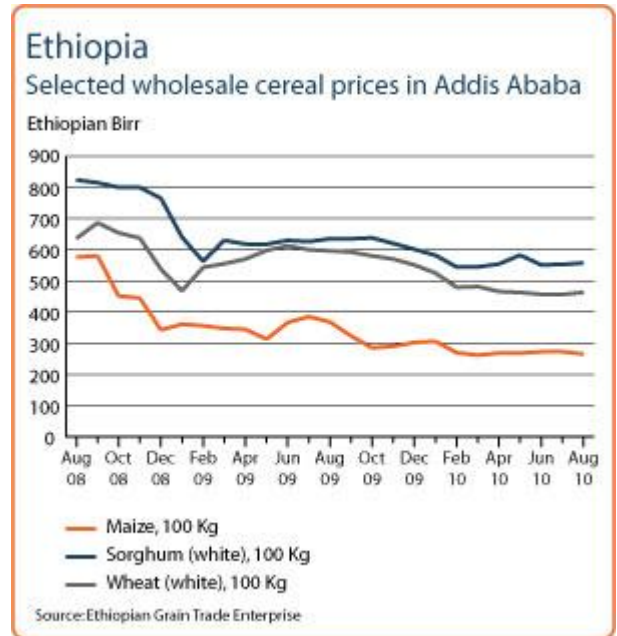
Despite the ongoing declining trend, current wholesale prices (July 2010) of white sorghum, maize, white wheat and teff are still 56, 34, 46 and 49 percent higher than the average of the last quarter of 2007, just before the food price crisis started in the country. At the beginning of July 2010, the Government lifted the export ban on sorghum and maize (in place since 2007) due to the abundant supply on markets.

About 5.2 million people in need of food assistance

Countrywide, the number of people in need of emergency food assistance until December 2010 is still officially estimated at 5.2 million. However, this figure is expected to be revised downwards according to a recent belg/gu assessment conducted by the Government in July whose results are expected to be released soon.

Food security situation in areas that do not produce “belg” crops is expected to deteriorate until the beginning of the “meher” harvest in October/November. Major concern areas are in eastern “meher” cropping zones that had a poor main harvest in 2009 and where food stocks have been quickly depleted (including eastern parts of Tigray and Amhara regions, parts of the Rift Valley, East and West Hararghe of Oromia region). Most of these areas are already receiving food through the relief food aid program and the Productive Safety Net Program.

Close monitoring is warranted for the probable occurrence of a strong La Niña phenomenon that may negatively affect the secondary season rains (from October to December) in the Somali region, Bale, Borena and Guji lowlands in the Oromia region and the South Omo zone of SNNP region.



Reference Date: 05-August-2010

FOOD SECURITY SNAPSHOT

- Good outturn for 2010 “belg” season crops and favourable prospects for current “meher” season
- Cereal prices are steady or declining, but still high compared to average
- An estimated 5.2 million people still depend on emergency food assistance

The secondary “belg” season cereal crop expected to be average

Harvesting of the 2010 secondary “belg” season crops is almost complete and early estimates point to an average harvest. Following intermittent rainfall in January that resulted in some initial planting failures, replanting in February was successful in most cropping areas and enhanced rains along the season have benefited yields. Late and erratic “belg” rains have affected crops in parts of Amhara and in the highlands of Tigray regions. In Somali region, the main “gu” season (April/June) rains have been abundant, with generally positive effects on water availability and pasture conditions leading to improved livestock body conditions and milk production.

Favourable prospects also for 2010 “meher” season crops

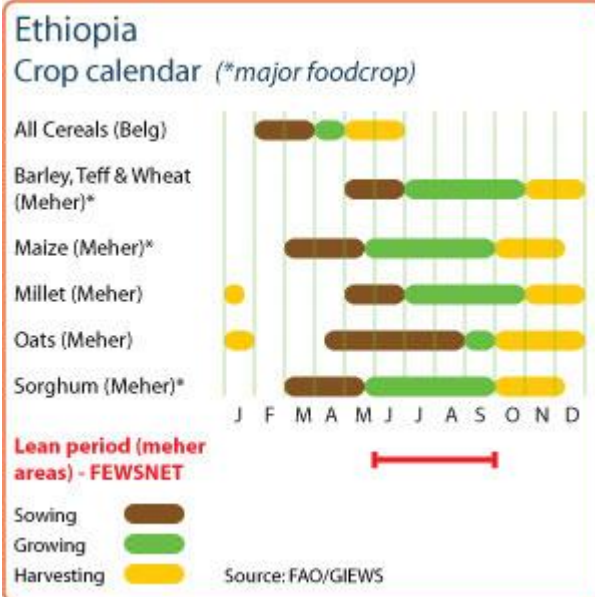
Planting of 2010 main season “meher” crops is almost complete in most barley, wheat and teff producing areas. After a slow start of the season in parts of Tigray, eastern Amhara and eastern Oromya regions, above average “kiremt” rains have significantly improved soil moisture conditions in key growing areas of western and central Oromya, western Amhara, northern SNNPR and eastern Benishangul-Gumuz regions. Good “karma” rains (July to September) are gradually improving pasture and water availability in northern agropastoral parts of Afar region that have been affected by below average “sugum” rains from March to May.

By mid-July, torrential rains have caused flooding in Tigray, Amhara, Afar, Oromiya, Somali and Gambella regions, with losses of assets, crops and livestock and raised concern of malaria outbreaks. More floods are likely in flood-prone areas if heavy rains continue in the next weeks. In some areas of Afar region, if floods are moderate, their recession is expected to be used for planting.

Cereal prices continue to decline from the record levels in mid-2008

Nationally, cereal prices have declined from their record levels, but still remain above pre-crisis levels of 2007. Wholesale price of maize has gradually declined from the September 2008 record level. In July 2010, maize was traded in Addis Ababa wholesale market at ETB 272 per 100 kg, about 53 percent lower than in September 2008. In the same period, wholesale price of both white wheat and white sorghum also dropped by about 30 percent.

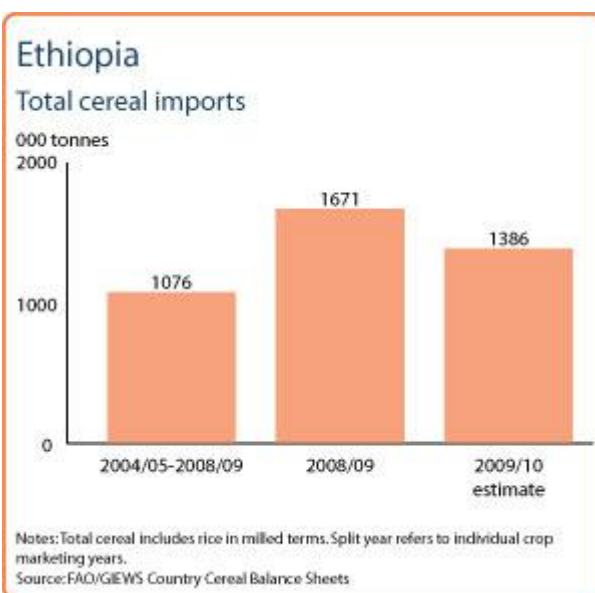
Despite the ongoing declining trend, current wholesale prices (July



Ethiopia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	4176	3900	4400	13
Cereals nes	2774	3000	3000	0
Wheat	2600	3000	2700	-10
Others	4603	4296	4826	12
Total	14152	14196	14926	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



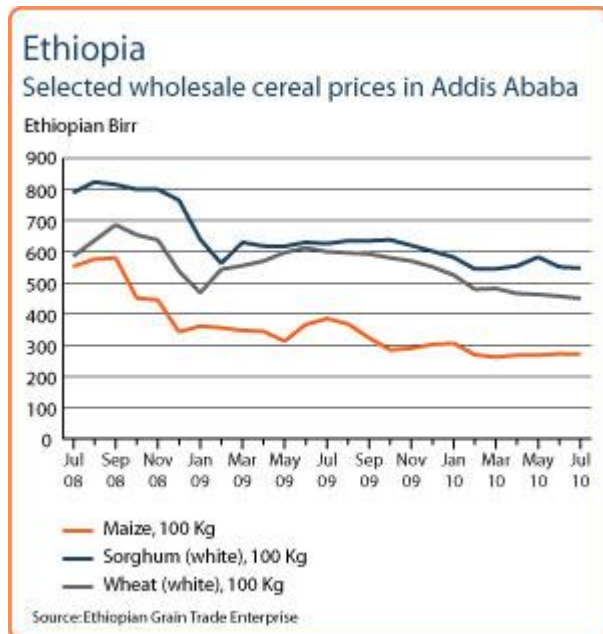
2010) of white sorghum, maize, white wheat and teff are still 53, 38, 42 and 53 percent higher than the price average during the last quarter of 2007, just before the food price crisis started in the country. At the beginning of July, the Government lifted the export ban on sorghum and maize (in place since 2007) due to the abundant supply on markets and this measure may increase prices in the next months.

About 5.2 million people in need of food assistance

Countrywide, the number of people in need of emergency food assistance until December 2010 is still officially estimated at 5.2 million. However, this figure is expected to be revised downwards according to a recent belg/gu assessment conducted by the Government whose results are expected to be released by the end of August.

Food security situation in areas that do not produce “belg” crops is expected to deteriorate until the beginning of the “meher” harvest in October/November. Major concern areas are in eastern “meher” cropping zones that had a poor main harvest in 2009 and food stocks have been quickly depleted (including eastern parts of Tigray and Amhara regions, parts of the Rift Valley, East and West Hararghe of Oromia region). Most of these areas are already receiving food through the relief food aid program and the Productive Safety Net Program.

The possibility of an occurrence of a strong La Niña phenomenon is alarming for the secondary “deyr” rains (from October to December) in the Somali region., If this is to happen, it would negatively affect water and pasture availability in pastoral and agropastoral areas of southern Somali region, the Bale, Borena and Guji lowlands of Oromia regions and the South Omo zone of SNNP region. Close monitoring is warranted.



Reference Date: 10-June-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2010 “belg” season production
- Cereal prices are steady or declining, but still high compared to average
- An estimated 5.2 million people require food assistance
- Food security situation expected to tighten during the lean season until next main harvest later in the year

Good prospects for the 2010 belg season crops

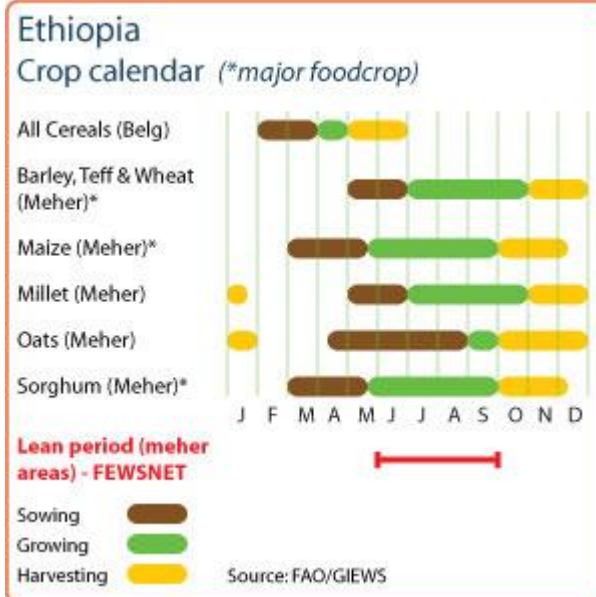
Harvesting of the 2010 secondary “belg” season crops is underway in parts and production prospects are generally good. Following intermittent rainfall last January that resulted in some initial planting failures, replanting in February was successful in most cropping areas and yields are expected to be average to above average. Localized water deficits were reported in April in parts of the southwest, but abundant rains in May limited the damages on crops. In Somali region, the main “gu” season (April/June) rains have also been abundant so far, with positive effects on water availability and pasture conditions leading to improved livestock body conditions. Milk production is gradually improving, although more time is needed to fully recover from the negative effects of several consecutive years of poor rainfall. In May, heavy rains in eastern and southern highlands caused localized flooding in the Somali region and in the SNNP region, especially along the Shabelle and Juba rivers, with displacement of people and some losses of crops and livestock. Poor pasture conditions persist in northern parts of Afar region as a consequence of poor 2010 “sugum” rains (March/May).

Planting of 2010 main season “meher” crops (mainly maize and sorghum) is underway in most producing areas of the country. In April, low rainfall and high temperatures have affected land preparation and planting in western parts of Oromia and SNNP regions and in the whole of Gambela region. However, abundant precipitations in recent weeks have significantly improved soil moisture conditions and brought some relief to crops in these areas.

Cereal prices continue to decline from the record levels in mid-2008

Nationally, cereal prices have declined from their record levels, but still remain above pre-crisis levels of 2007. Wholesale price of maize has gradually declined from the September 2008 record level. In May 2010, maize was traded in Addis Ababa wholesale market at ETB 268 per 100 kg, about 54 percent lower than in September 2008. Wholesale price of both white wheat and white sorghum also dropped by about 30 percent in the same period.

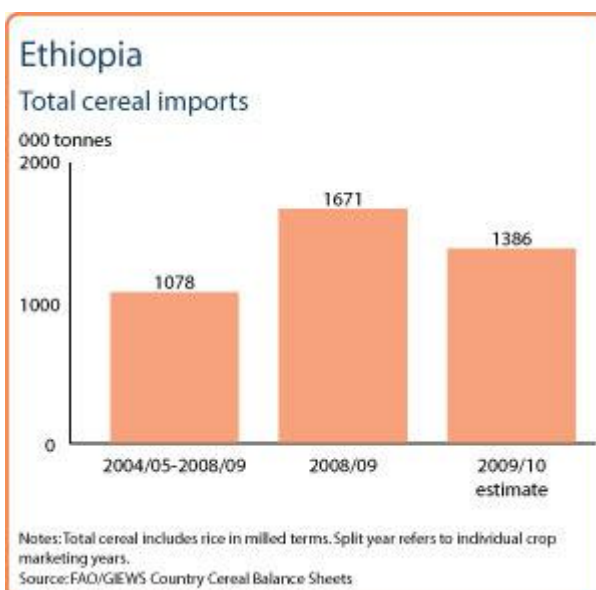
Despite the ongoing declining trend, current wholesale prices (May 2010) of white sorghum, maize, white wheat and teff are still 63, 36, 47 and 50 percent higher than the price average during the last quarter of 2007, just before the food price crisis started in the country.



Ethiopia Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	4176	3900	4100	5
Cereals nes	2774	3000	3000	0
Wheat	2600	3000	3000	0
Others	4603	4296	4626	8
Total	14152	14196	14726	4

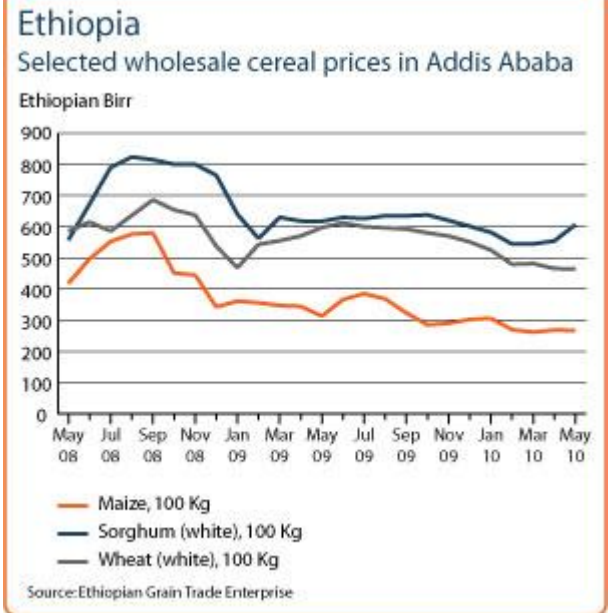
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



About 5.2 million people in need of food assistance

Food security situation started to improve in most of the “belg” producing areas with the beginning of the green harvest in May and further improvements are expected in the coming weeks as the “belg” harvest progresses and production becomes available in local markets.

Countrywide, the number of people in need of emergency food assistance from January to June 2010 is still officially estimated at 5.2 million. Most food insecure people are concentrated in the eastern lowlands of Oromia region, some districts in eastern Amhara, eastern and southern Tigray, pastoral zones of Afar region, northern and southeastern Somali region, Gambela region and most low-lying zones of southern and central SNNPR. This number is expected to increase throughout the lean season that has just started until the beginning of the “meher” harvest in September. Food security is likely to deteriorate in particular in those “meher” producing areas that had a poor harvest in 2009 and have very low food stocks (including parts of Tigray, eastern Amhara and eastern Oromia).



Reference Date: 06-April-2010

FOOD SECURITY SNAPSHOT

- Early onset of 2010 “belg” rains is favouring crop and livestock production.
- Food prices are steady and even declining, but still higher than average (especially wheat and teff).
- An estimated 5.2 million people require emergency food assistance.

Positive start for the 2010 belg season

Planting of the 2010 secondary “belg” grain crops is well advanced. “Belg” rains had an early onset in February in most areas of up to, two to four weeks earlier than usual,. These rains improved soil moisture in eastern lowlands of Oromia, parts of Amhara and Afar regions that were suffering from water shortages in the past few months. In SNNP region, the current outlook for crops including root crops is positive. The rains have also been favourable to coffee and enset production. In Somali region, the main “gu” season rains have also started early, at the beginning of March instead of April, with positive affects on water availability and pasture conditions. On the other hand heavy rains were reported to have damaged some crops in south-eastern Tigray and in some areas of SNNP region. Poor pasture conditions still persist in parts of Afar region, lowlands in eastern Tigray and Amhara regions and eastern lowlands of Oromia region (in particular in East and West Haraghe, Bale and Arsi zones).

Land preparation and planting of 2010 long-cycle Meher crops (mainly maize and sorghum) are underway in most producing areas of the country.

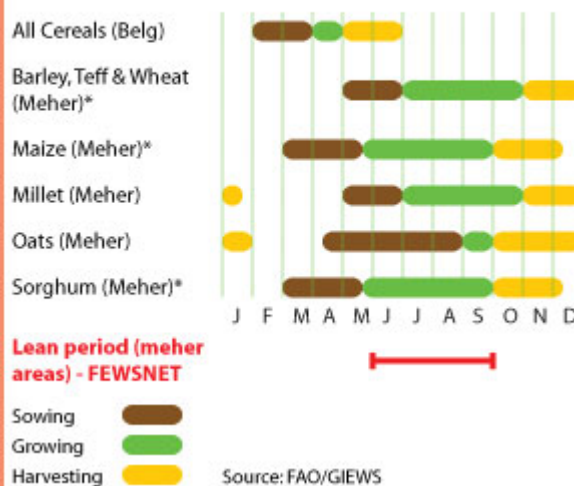
Cereal prices continue to decline from record levels in mid-2008

Nationally, cereal prices have declined from their record levels, but still remain above pre-crisis price levels of 2007. Wholesale price of maize has gradually declined from the September 2008 record level. In March 2010, maize was traded in Addis Ababa wholesale market at a low price of ETB 260 per 100 kg, about 55 percent lower than in September 2008. Wholesale price of wheat also dropped by more than 30 percent in the same period. Commercial imports of some 822 000 tonnes of wheat by the Government for sale at subsidized prices to low-income households in several urban areas since August 2008 has partly contributed to the decline in prices. The stabilizing effect on wheat price influenced also the markets of other cereals, such as teff and sorghum, whose prices declined by 26 and 34 percent respectively from 2008 record levels.

Comparing current wholesale prices (March 2010) with price average during the last quarter of 2007, just before the food price crisis started in the country, the prices of sorghum, maize, wheat and teff are still 22, 32, 50 and 100 percent higher.

Population in need of food assistance estimated at 5.2 million

Ethiopia Crop calendar (*major foodcrop)

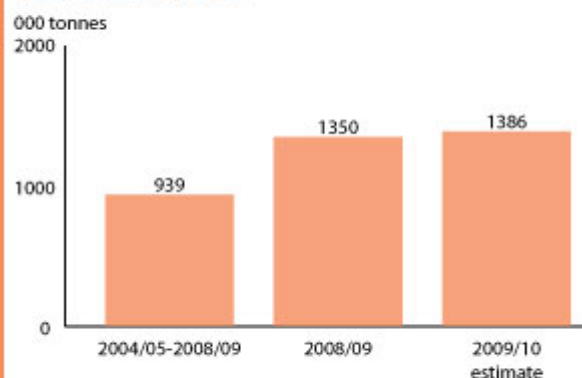


Ethiopia Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	3977	4398	3900	-11
Cereals nes	2583	3058	3000	-2
Wheat	2435	2654	3000	13
Others	4440	5239	4296	-18
Total	13436	15349	14196	-8

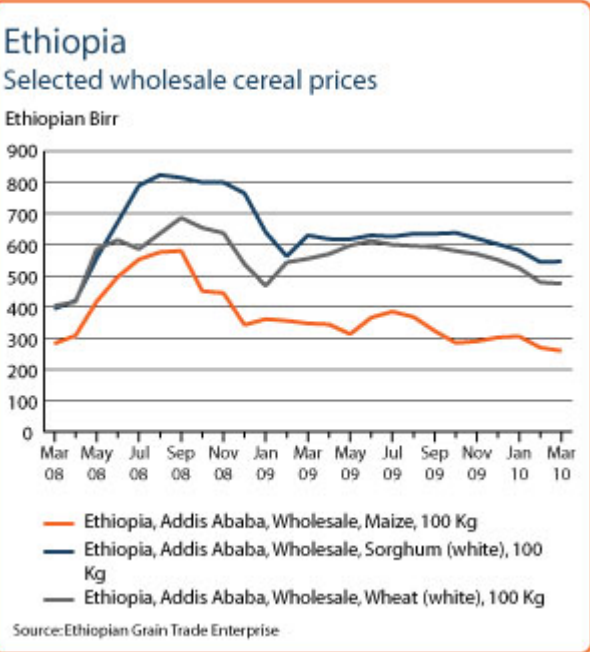
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Most food insecure people are concentrated in the eastern lowlands of Oromia region, some districts in eastern Amhara, eastern and southern Tigray, pastoral zones of Afar region, northern and southeastern Somali region, Gambela region and most low-lying zones of southern and central SNNPR. The number of people in need of emergency food assistance from January to June 2010 is estimated at 5.2 million, an 8 percent increase on the previous forecast of 4.8 million people.



Reference Date: 03-February-2010

FOOD SECURITY SNAPSHOT

- An estimated 4.8 million people require emergency food assistance
- Poor rains contribute to reduced crops production in 2009 compared to 2008
- At retail markets, wheat is the most affordable cereal

Substantial reduction in 2009 long-cycle cereal crops

Harvesting of 2009 “meher” season crops has been virtually completed. An FAO/WFP Crop and Food Security Assessment Mission (CFSAM) visited the country in November/December 2009 to estimate the “meher” cereal and pulse production and the report is expected to be issued soon. Early indications point to a reduced crop compared to the record crop of the previous year. This is mainly due to late and erratic “meher” rains in most parts of the country that were often interspersed with long dry spells that affected flowering and grain fill in many crops, leading to lower yields. The adverse weather conditions have affected more long-cycle crops, such as maize and sorghum, than teff, wheat and barley. The decrease in production has been observed especially in the eastern regions of the country and in the lowlands. However, high-producing areas such as North and South Gonder and the lowlands of Bale, Arsi and Rift Valley areas have also registered below average yields.

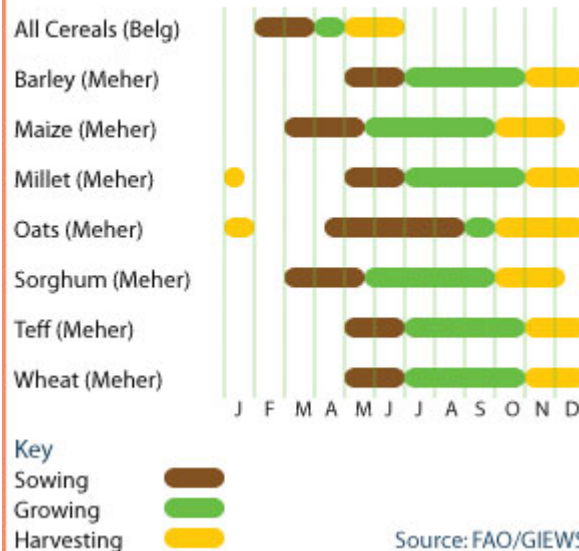
Cereal prices continue to decline from record levels in 2008

Nationally, cereal prices have declined from their record levels, but still remain above pre-crisis price levels of 2007. In particular, wholesale nominal price of maize has gradually declined from the September 2008 record level as a result of the lower demand by humanitarian agencies following Government’s restrictions for bulk purchases of cereals from local markets. At the same time, wheat retail price dropped by almost 32 percent between September 2008 and January 2009, becoming the most affordable cereal crop, currently ranging from 560 to 655 ETB/quintal. This is essentially the result of the injection in to the market of some 822 000 tonnes of imported wheat by the Government (representing more than 32 percent of the 2008 wheat production) that are distributed at subsidized price to low-income households in several urban areas since July 2008.

Population in need of food assistance estimated at 4.8 millions

Most food insecure areas are in eastern marginal cropping zones of eastern and southern Tigray, eastern Amhara and lowlands of eastern Oromia, pastoral zones of Afar, northern and southeastern Somali region, Gambela region and most low-lying zones of southern and central SNNPR. The number of people in need of emergency food assistance from January to June 2010 is officially estimated at 4.8 million, substantially lower than previous estimate of 6.2 million people in October as a consequence of the arrival on markets of the newly harvested crops.

Crop calendar Ethiopia



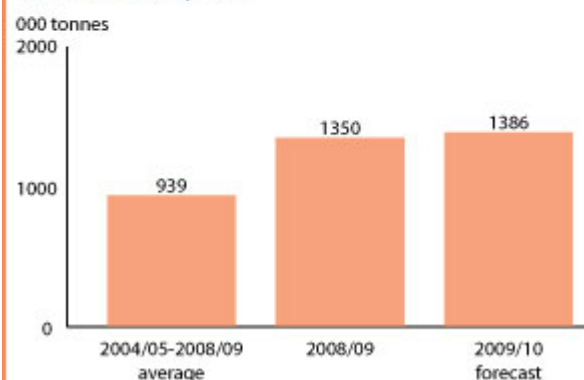
Ethiopia

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	3977	4398	3900	-11
Cereals nes	2583	3058	3000	-2
Wheat	2435	2654	3000	13
Total	13952	15349	14196	-8

Note: percentage change calculated from unrounded data.

Total cereal imports



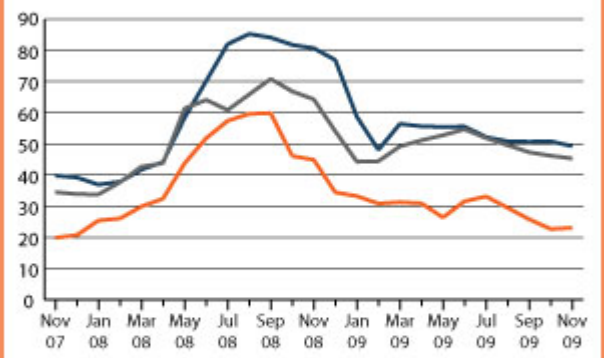
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Ethiopia

Selected wholesale cereal prices

US Dollar



- Ethiopia, Addis Ababa, Wholesale, Maize, 100 Kg
- Ethiopia, Addis Ababa, Wholesale, Sorghum (white), 100 Kg
- Ethiopia, Addis Ababa, Wholesale, Wheat (white), 100 Kg

Source: Ethiopian Grain Trade Enterprise

Reference Date: 14-September-2009

FOOD SECURITY SNAPSHOT

- An estimated 6.2 million people require emergency food assistance
- Poor rains contribute to a below average secondary “belg” crops production
- Livestock conditions worsen in southern Ethiopia as a result of unfavourable weather conditions

Dry conditions reduced 2009 “belg” output and affected pastoralists

Harvesting of 2009 belg season crops has been completed in August and production is early estimated to be well below average. In most cropping areas, kiremt rains (June to September) and belg/gu rains (February to May) had a late start and have been scarce with often uneven spatial and temporal distribution. The eastern part of the country is the most affected, in particular Southern and Eastern Tigray, Amhara, and East and West Hararghe and, in some cases, crop losses are estimated up to 75 percent. Scarcity of water and pasture in many lowland woredas of Afar, Borena, South Omo, Oromia and Somali region have caused several deaths of animals and lead to a general deterioration of livestock body conditions with consequent worsening of terms of trade for pastoralists. It is estimated that between 100 000 and 200 000 animals have crossed the border with Kenya, moving away from drought-affected areas and contributing to the early depletion of local pastoral resources. Distress sales of livestock and firewood collection are the major coping strategies being reported to face the worsening food security situation.

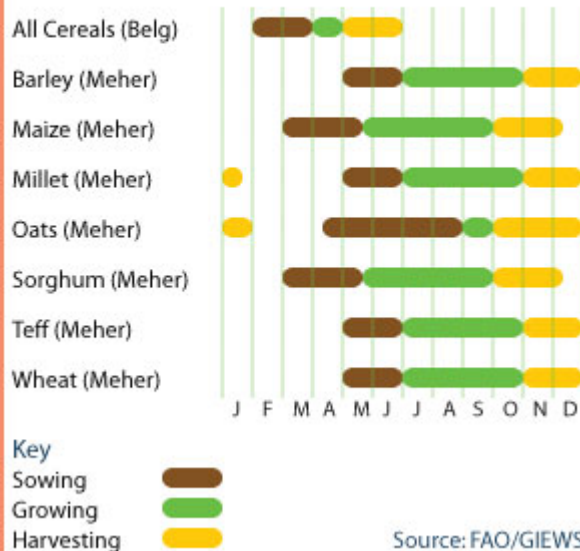
Late and erratic “kiremt” and “belg/gu” rains are negatively affecting also 2009 “meher” crops

The late start of kiremt rains has also delayed planting operations of 2009 meher short-maturing crops such as wheat, barley, peas and beans that are normally planted in June. It means that these crops are behind their normal phenological stages and are unlikely to reach full maturity unless rains continue well beyond the end of September. Late and inadequate kiremt and belg/gu precipitations have also negatively affected planted area of 2009 meher long cycle crops as maize and sorghum. In some low-lying woredas of North Shewa, East and West Hararghe, Arsi, West Arsi and in large parts of SNNPR, farmers have already re-planted wheat, teff and barley crops to minimize failures of long-cycle crops.

Cereal prices are declining, but are expected to increase further during hunger period

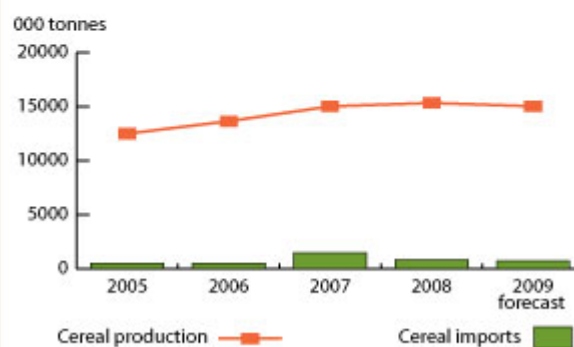
Government initiatives, including export bans, price controls and elimination of domestic taxes on selected items have contributed to reducing the annual food inflation rate to 44.2 percent in June 2009, down from a peak of 61.1 percent in February 2009, leading to improvement in food access. Nationally, cereal prices have declined and stabilized since reaching record levels in September 2008, but still remain above pre-crisis price levels of 2007.

Crop calendar Ethiopia



Cereal production and imports Ethiopia

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes		percent	
Maize	3976	4398	4400	0%
Cereals NES	2583	3058	3000	-1.9%
Wheat	2435	2654	2600	-2%
Other	4048	5239	5039	-3.8%
Total Cereals	13433	15349	15039	-2%

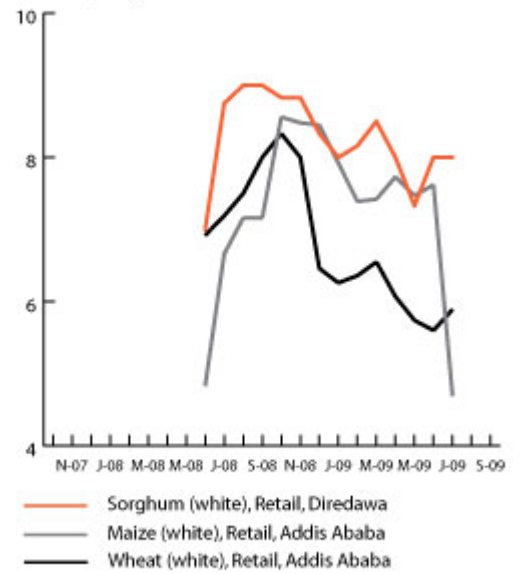


Food insecure population goes up to 6.2 millions

The overall food supply situation remains highly precarious. With the partial failure of the secondary "belg" season crop, the number of people in need of emergency assistance is expected to increase by 1.3 million to 6.2 million. In eastern and southern Ethiopia, large numbers of people whose livestock and livelihoods have perished due to successive drought, depend solely on food assistance.

Ethiopia Selected food prices

Ethiopian Birr per Kg



Source: Central Statistical Agency