



GIEWS Country Brief Ethiopia

Reference Date: 22-November-2016

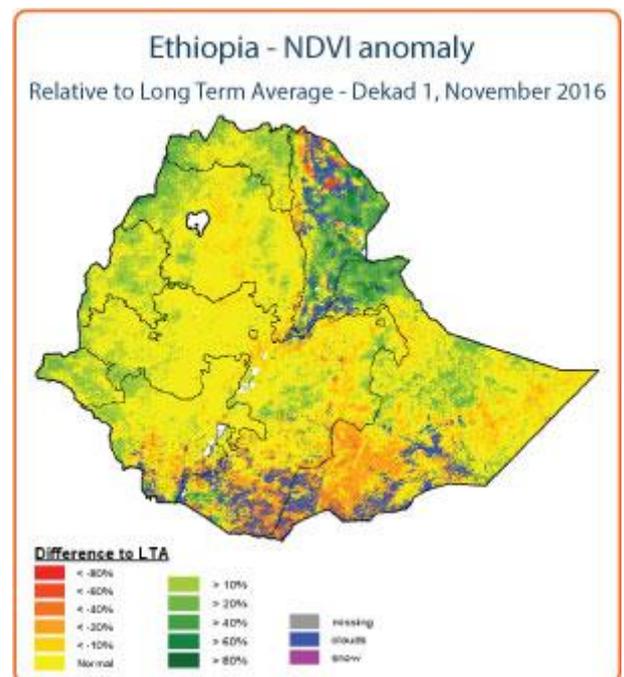
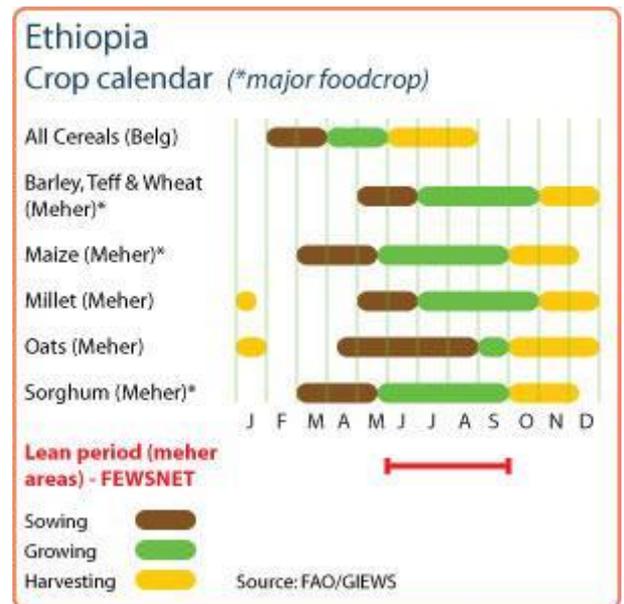
FOOD SECURITY SNAPSHOT

- 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.

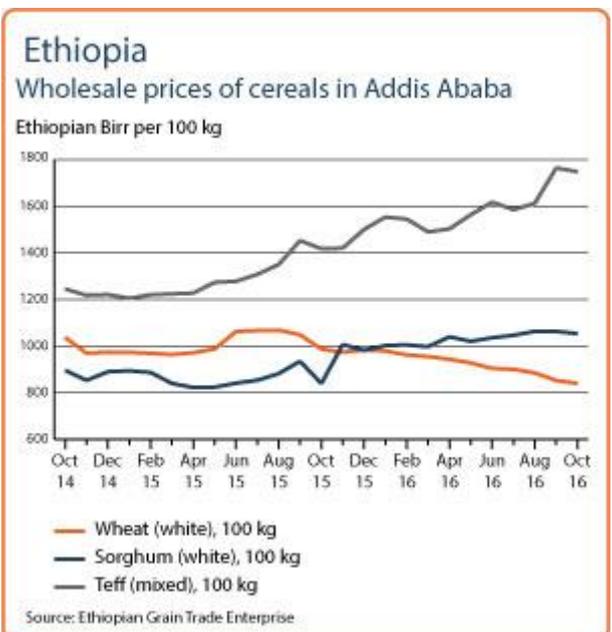
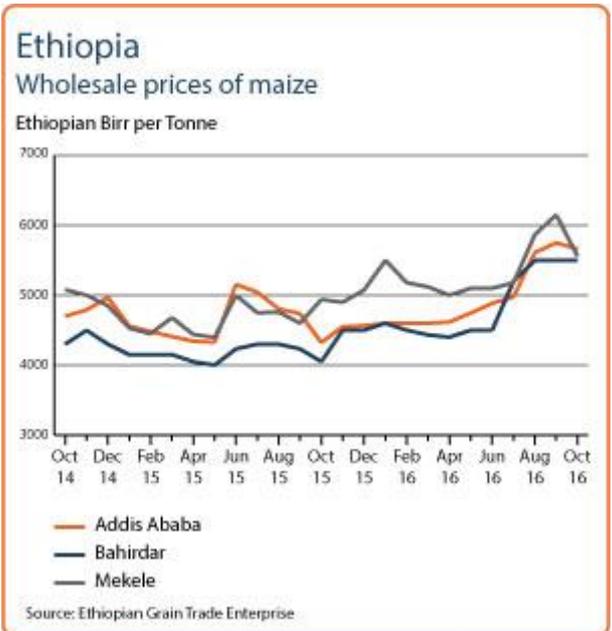
Prices of other food products are also higher than 12 months earlier. In October 2016, the year-on-year rate of inflation was 9 percent for meat, milk, cheese and eggs, and fruits. At regional level, the highest rates of food inflation were recorded in Diredawa (9.2 percent), Afar (9.4 percent) and Tigray (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.