ETHIOPIA Food Security Outlook

Average Meher harvest likely, though poor Belg/Gu and high prices drive Crisis (IPC Phase 3) outcomes

KEY MESSAGES

• Deyr/Hagaya rains in southern and southeastern Ethiopia were significantly above average in October, resulting in one of the wettest Octobers on the historical record. Localized flooding occurred in Oromio, SNNPR, and Somali Regions, displacing 205,000 people and causing localized crop and livestock losses. A flooding risk continues for these areas as rainfall for the rest of the season is forecast to be above average. Localized, negative impacts are expected; however, the above-average rainfall will also lead to favorable pasture and crop development.

• National Meher production is expected to be average due to generally favorable June to September Kiremt rainfall. Meher production is expected to improve household and market food availability nationally. However, poor Kiremt rains in parts of northeastern Amhara, eastern Tigray, and northern Afar resulted in poor production prospects for the ongoing Meher harvest in these areas.

• Prices for commodities such as maize, sorghum, and wheat are expected to slightly decline seasonally from October to December, although prices are expected to remain above average. From January to May, increases in grain prices are expected, reducing the purchasing power of market-dependent poor households. In pastoral areas, livestock prices are expected to increase; however, they are unlikely to keep pace with staple food price increases. As a result, livestock to grain terms of trade are anticipated to decline and remain below average. This will continue limiting pastoral households’ ability to purchase sufficient grain to meet their basic needs.

• In areas including lowlands of East Hararghe, Guji, and Bale Zone in Oromia and Northern Afar, where Kiremt rainfall was below average, and in the border areas of Western Somali and Oromia where insecurity is affecting movement of pastoralists, poor households are expected to face constraints to typical food access. Crisis (IPC Phase 3) outcomes are likely in these areas throughout the scenario period. Minimal (IPC Phase 1) or Stressed (IPC Phase 2) outcomes are expected in the rest of the country due to the likely average Meher harvests, improved livestock productivity, and near normal herd sizes that are facilitating household food access.
**NATIONAL OVERVIEW**

**Current Situation**

Performance of June to September 2019 Kiremt rainfall was favorable across most areas, particularly in surplus-producing western and central areas of the country; however, some localized areas of northeastern Amhara, eastern Tigray, and northern Afar received below average rains (Figure 1). In these areas, rainfall started nearly a month late with intermittent mid-season dry spells. In late August, heavy rainfall led to over saturation of soil, which resulted in flooding in parts of central riverine and low-lying areas with localized crop losses. In areas with below-average Kiremt rainfall, September and October rainfall decreased cumulative rainfall deficits and improved pasture and cropping conditions. In East and West Hararghe zones of Oromia, Kiremt rainfall typically ends in September; however, this year late season rainfall continues to enhance production estimates. However, some late season rainfall in parts of Afar, Oromia, and SNNPR, could potentially negatively affect maturing crops and/or spoil stored grains.

National grain production and availability is unlikely to be significantly affected by losses associated with below-average Kiremt rainfall; however, this is likely to lead to isolated below-normal levels of household food stocks in affected areas. The Meher harvest is ongoing across most areas, especially in high producing areas of central and eastern Ethiopia. In Amhara and Tigray, harvesting of early maturing crops, such as barley and haricot bean, has already started. In central and western parts of the country, both long and short cycle crops are nearing the harvesting stage. However, areas of northeastern Tigray and Amhara that experienced poor Kiremt seasonal rainfall are expected to have below-average harvests, though its contribution for the overall Meher production is minimal. This will have minimal impacts on overall national production, with average overall Meher production anticipated.

Deyr/Hagaya rainfall started in early October with heavy rains and some areas receiving 160 mm or more of rainfall in the first two weeks of the season. As a result, October has been among the wettest on record. This excessive rainfall has caused localized flooding in Borena and Bale Zones of Oromia, Hadya zone in SNNPR, Afder, Liben, Dollo, Korah, Dawa, and parts of Shabelle/Gode Zones of Somali regions. According to a UNOCHA, as of late October, an estimated 205,000 people are displaced, with over half of displaced people in Somali Region. Reports as of late October estimate of over 20,000 hectares of crops (maize, sorghum) and nearly 10,000 livestock were washed away by the floods in Somali region. Overall, cumulative October rainfall is expected to be over 225 percent of normal (Figure 2).

Since September, when desert locusts were first reported in Ethiopia, they have continued to threaten the northern and eastern parts of the country, covering about 56 woredas. Desert locust bands are spreading towards northeastern parts of Tigray and Amhara and southward to the Ogaden plateau in Somali region. The average to above-average soil moisture and continued rainfall in the eastern part of the country has created an environment conducive to locust breeding. According to UNOCHA, as of mid-October, desert locust bands cover an estimated 17,500 hectares with the government confining and controlling about 10,600 hectares. The worst-affected area of the country is Dollo Zone in Somali Region with locusts mostly...
affecting pasture. If urgent control operations do not continue to manage the situation, the locust bands will continue to damage both pasture and agricultural land.

Pasture conditions are generally favorable in western and central areas of the country due to above-average rainfall. In localized areas of northern Afar, northeastern Amhara, and eastern Tigray, according to the Normalized Difference Vegetation Index (NDVI), grazing land conditions are below the median due to poor rainfall; however, some late season rainfall is improving pasture availability. Additionally, per the NDVI, pasture conditions in Deyr/Hagaya rain receiving areas are below the median, although this is most likely due to the lag time it takes for pasture to regenerate following the start of the rainy season. In areas with late season rainfall of northern Ethiopia, livestock are returning to their normal homesteads for grazing. Although livestock births and milk production are below average in these areas due to poor body condition. Livestock body conditions and productivity in central, western, and northern areas of the country are near average, besides in localized areas of northern Afar, northeastern Amhara, and eastern Tigray where poor pasture conditions and water availability is leading to below-normal livestock body conditions.

Prices of locally produced staple foods have been increasing since October 2017 and remain well above average (Figure 3), specifically in Belg receiving areas where production was below average. September 2019 prices for sorghum, wheat, and maize in Woldeya, Addis Ababa, and Hosanna markets were over 25 percent higher than last year’s prices and the five-year average. In addition, sorghum prices in Gode market are 100 and 66 percent above last year and the five-year average, respectively. Staple food prices are generally above average due to macroeconomic factors including high fuel prices and transportation costs and abnormally high market demand due to poor production in some areas.
Similarly, livestock prices continue to increase in most parts of the country, specifically in Somali region where September 2019 cattle prices are about 40 percent above average (Figure 4). September 2019 shoat prices in Woldiya and Gode markets show an increase of nearly 40 percent and slightly over 25 percent compared to last year and the five-year average, respectively. Despite increases in both livestock and staple food prices, the livestock-to-cereal terms of trade (ToT) are not favorable for pastoral households, as staple food prices are increasing at a faster rate than livestock prices. As such, the shoat to sorghum TOT has declined by over 55 percent in most markets across the country.

Many poor households across the country have limited income access from livestock sales, livestock products, and agriculture labor. However, they are accessing income mainly from casual labor and self-employment activities such as petty trade, charcoal, and firewood sales. Income from agriculture labor associated with the Meher harvest is near average; however, in areas with a below average harvest, income from this source is below typical levels. In pastoral areas of the country, specifically southern and southeastern areas still recovering from the 2015/16 drought, herd sizes are below average, as is income from livestock and milk sales. Similarly, in northern pastoral areas where livestock conditions are below average, incomes from livestock and milk sales is limited. Additionally, in areas affected by conflict, household are unable to engage in their normal livelihood activities. In parts of the country with a high concentration of IDPs, there is an increase in competition for labor opportunities, driving down labor wage rates. Generally, across the country, purchasing power of most poor households is below normal due to below-average income and very high food prices.

The political and insecurity situation remains unpredictable as conflict between bordering ethnic groups continues. Conflict has been of increasing concern since 2018 in most bordering areas of Somali and Oromia Regions, Gedeo and Segen Zones of SNNPR and Guji Zone of Oromia and some localities Gurage Zone in SNNPR. This has resulted in displacement of households and disruption to normal livelihood activities. According to an IOM report in October, slightly over 1.6 million people continue to be displaced with most of this population displaced by conflict. IDPs continue to return to their place of origin with an estimated 1.5 million people returned to their communities. However, returnees face difficulty reintegrating into their communities and have limited assets and ability to engage in normal livelihood activities. As such, many of these households are in need of humanitarian food assistance.

According to UNHCR, as the end of September 2019, Ethiopia hosts an estimated 702,000 registered refugees and asylum seekers. The number of refugees has declined over the past year. Nearly half of all refugees are from South Sudan including a quarter from Somalia and one quarter from Eritrea and Sudan. The opening of the border between Eritrea and Ethiopia resulted in an increase in the number of new arrivals from January 2019 to late-October 2019.

As per Emergency Nutrition Coordination Unit (ENCU) data from July 2019, TFP admissions nationally were near or above last year and the five-year average. The areas with the highest TFP admissions above last year and the five-year average...
are Somali and Oromia Regions. There is a reported outbreak of Acute Watery Diarrhea (AWD) in Somali Region, but has also occurred in other regions, including Oromia, Afar, and Amhara. This is most likely having an impact on the increased number of cases of acute malnutrition, specifically in Somali and Oromia Regions. Additionally, acute malnutrition is likely driven at least in part to limited access to clean water sources as well as a high prevalence of disease.

As per data from the food aid Prioritization Committee (PC) chaired by The National Disaster and Risk Management Commission (NDRMC) an estimated 8.0 million people are being reached in each distribution of humanitarian food assistance from the beginning of the HRP in March 2019. Typically, at this time of year, organizations are implementing Rounds 6 and 7 of humanitarian food assistance distribution; however, this year due to a pipeline break prior to the delivery of Round 3, distribution is delayed. As per an update by the PC on October 31, about 73 percent of the planned food and all of the cash distributions in Round 3 has taken place. Round 4 food distributions is also ongoing with 100 percent of cash beneficiaries already receiving their distribution. Round 3 and 4 beneficiaries have been reached across the country from July to present. The majority of assistance is being distributed to pastoral areas of the country specifically in Afar and Somali Regions. Humanitarian food assistance is most likely improving household access to food in areas where it is delivered; however, the role of humanitarian food assistance at the area-level is difficult to assess based on available data and irregular and delayed delivery.

The Productive Safety Net Program (PSNP) typically distributes cash and food assistance to chronically food insecure households supplementing their food and income sources. Beneficiaries typically receive their assistance in January to June; however, there are field reports indicating distribution is still pending in some PSNP receiving woredas, due to logistic issues.

Many households in surplus producing areas of the country are accessing own foods with the start of the Meher production and are in Minimal (IPC Phase 1). Delayed, but average 2019 Belg and average Meher production is improving household food access. Additionally, access to income from agricultural labor was above average slightly improving households purchasing power. As a result, most areas in SNNPR are currently in Minimal (IPC Phase 1) except along the Rift Valley where most households are in Stressed (IPC Phase 2). In areas where Meher harvest is ongoing, demand for market foods is decreasing as households are relying on own foods for consumption. The delayed and below average Belg harvest coupled with price increases, below-average incomes has resulted in decreased food access; Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes are likely across many Belg producing areas in northeastern Amhara, southern Tigray, and agro-pastoral areas of Afar.

Poor pastoral households in northern Afar, south and southeastern Somali, lowlands of Borena, Guji, Bale, East and West Hararghe Zones of Oromia regions are currently in Crisis (IPC Phase 3) as the result of below-average livestock body conditions and productivity. Delayed, but average 2019 Belg and average Meher production is improving household food access. Additionally, access to income from agricultural labor was above average slightly improving households purchasing power. As a result, most areas in SNNPR are currently in Minimal (IPC Phase 1) except along the Rift Valley where most households are in Stressed (IPC Phase 2). In areas where Meher harvest is ongoing, demand for market foods is decreasing as households are relying on own foods for consumption.
Assumptions

The most-likely scenario from October 2019 to May 2020 is based on the following national-level assumptions:

- **The most likely ENSO Neutral conditions and positive Indian Ocean Dipole (IOD) through December 2019 will most likely result in above-average October to December (Deyr/Hageya) rains over southern and southeastern parts of Ethiopia.**

- **In November and December, heavy Deyr/Hagaya rainfall is likely to generate atypical levels of flooding, particularly over flood-prone areas of Shebelle and other riverine areas of the Somali and Oromia Regions. Flooding is expected to temporarily displace households and have localized crop and livestock losses, and potentially limit humanitarian access to flood-affected areas.**

- **Temperatures, in north-eastern and parts of central and southwestern Ethiopia are anticipated to be warmer than average temperature, while southwestern Ethiopia is most likely to experience near average temperatures. This will likely lead to the drying of pasture and surface water availability slightly earlier than normal.**

- **The start of February to April 2020 Belg/Sugum/Diraac/Gu rains is most likely to have a timely start with average cumulative rainfall.**

- **Southeastern pastoral areas are expected to have normal regeneration of pasture and water availability to above normal levels following above average Deyr/Hagaya rainfall. These seasonal improvements of pasture and water availability are expected to lead to normal livestock body conditions, near normal level of conceptions, and seasonal livestock productivity. However, due to high livestock deaths in 2016/17, cumulative livestock conceptions and product production are expected to remain below average.**

- **In pastoral areas of Afar and northern Somali (Sitti and Fafan zones) Regions, availability of pasture and water is expected to be near normal following average Karan/Karma/Kiremt rainfall. In these areas, livestock body conditions, conceptions, productivity, and production will most likely remain near average. Although, localized areas of northern Afar with below average rainfall, are likely to have below average water and pasture availability. This is expected to lead to a slight deterioration in body conditions of livestock, production, and productivity with slightly below average rates of conception.**

- **Livestock prices and price trends are likely to follow seasonal trends and remain above the five-year average (Figure 7). However, prices are expected to gradually decrease between February and March 2020 in much of Somali, northern Afar and the southern lowlands of Oromia due to the long dry season and localized below average Kiremt rainfall in northern Afar.**
• Access to food and income from own production is likely to improve to normal levels between October 2019 and January 2020. However, poor households and the middle and some better-off households in northeastern Amhara, southern and eastern Tigray, and eastern Oromia are likely to start, as typical, exhausting own harvest starting February 2020 and rely more on markets as the lean season approaches from March to May 2020.

• Staple food prices are likely to follow seasonal trends; however, prices are likely to remain significantly above last year and the five-year average due to anticipated inflation and increasing fuel, spare parts, and transportation costs.

• The Ethiopian Birr is expected to continue gradually depreciating through the outlook period due to tight foreign reserves, global strengthening of the USD, and increasing interest due on USD-denominated debt. As a result, domestic fuel and transportation costs are likely to increase. Imported agricultural inputs prices are expected to be atypically high limiting household planting ability.

• Livestock to staple food ToT is likely to continue to favor cropping households as price increases for staple food are higher than the price increase for livestock, this is deteriorating the purchasing power of the pastoralists.

• With anticipated average seasonal Meher 2019/2020 and perennial crop harvest, including coffee and fruit, October 2019 to January 2020, agricultural labor opportunities and wage rate are likely to be normal.

• The number of cases of Acute Watery Diarrhea (AWD)/cholera is expected to increase, particularly in Holly water areas of Amhara, and Tigray regions. Moreover, with the anticipated average Deyr/Hagaya rains, pastoral communities who are dependent in open water sources in Somali, Afar and southern Oromia regions are expected to be affected by AWD/cholera. The possibility of increased AWD/cholera outbreaks is also of concern in state farm areas of Afar, Metema and Humera areas of Tigray and Amhara in October 2019 to January 2020 due to the concentration of daily labors in state farms for harvesting without having proper sanitation facilities and access for potable water.

• In eastern and north eastern parts of the country where production will be below average, a high number of admissions of children to nutrition programs is anticipated. The nutritional status of children and PLWs, it is expected to improve between October 2019 to January 2020 following the anticipated Meher 2019 production as TFP admission rates are expected to return to near the five-year average. However, starting in February 2020 nutrition outcomes are anticipated to start deteriorating due to exhaustion of own production and the long dry season.

• Conflict between ethnic groups is most likely to remain a constant concern among communities after the Meher harvest in agricultural areas and during the Deyr/Hagaya rains in pastoral areas due to tension over grazing, pasture, and water resources. This is expected to result in a temporary increase in displacement and disruption in normal livelihood activities, movement of people for labor activity and livestock, and trade flows.

• Resource transfers through the Productive Safety Net Program (PSNP) are expected to take place following the typical schedule from January to June 2020 with most beneficiaries being reached in the eastern half of the country (Figure 6). Humanitarian food assistance is planned and funded through the start of 2020. Although, it is anticipated delivery of assistance will follow current trends with the continued occasional delays.

Most Likely Food Security Outcomes

Food security is expected to remain relatively stable across the country from October 2019 to May 2020 owing to the average Meher harvest and generally favorable conditions across the country. Households in central and western surplus-producing areas of the country are expected to continue facing Minimal (IPC Phase 1). In general, while average Meher production is anticipated at the national level, crop production is expected to be below average in areas of northeastern Amhara, eastern Tigray, and East and West Hararghe Zones of Oromia. In these areas, Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are expected from October 2019 to January 2020. However, from February to May 2020, Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are expected to emerge in these areas as household food stocks are expected to be limited or exhausted. Additionally, market food access is anticipated to be limited since household purchasing power is below average due to high staple food prices.

In areas where flooding occurred and is expected along riverine and low-lying areas in Deyr/Hagaya rainfall areas, localized areas are expected to have crop and livestock losses with some temporary displacement. In these areas replanting may not be possible due to water logging and livestock may have difficulty finding forage. However, flooding is expected to also have positive impacts, leading to above average pasture regeneration after flood waters recede. The negative impacts of flooding are expected to be localized with more large-scale positive effects on pasture and cropping conditions in the medium term. Despite the positive improvements, poor households in western areas of southern and southeastern pastoral areas
bordering Somali and Oromia regions are expected to remain in Crisis (IPC Phase 3). As livestock are anticipated to return to their homestead, households are able to sell livestock products normally for food, although at below average levels. In eastern and central parts of Somali region Stressed (IPC Phase 2) outcomes are expected to be widespread as the result of the Hagaya/Deyr rainfall improving pasture and water availability, which is anticipated to continue to improve livestock production and productivity. However, although pastoral conditions continue to improve, households’ livestock herd sizes still have not recovered from drought in 2016 and 2017, which continues to limit household purchasing power.

Most parts of Belg dependent areas in SNNPR, Stressed (IPC Phase 2) is most likely from October 2019 to May 2020 due to below average harvest associated with localized insecurity and conflict. However, some areas affected by conflict bordering Oromia are likely to deteriorate to Crisis (IPC Phase 3) between February and May 2020 period. Areas of SNNPR, Oromia, and Somali region that experienced significant ethnic clashes in 2019 are also anticipated to continue experiencing Crisis (IPC Phase 3) outcomes. The worst-affected resident and displaced populations are expected to be directly impacted with insecurity limiting livelihood opportunities and ability to engage in the ongoing agriculture seasons. Similarly, previously displaced households returning to their place of origin are most likely to continue facing Stressed (IPC Phase 2) or Crisis (IPC Phase 3) depending on their ability to re-integrate and return to their normal livelihoods.

**Events that Might Change the Outlook**

Possible events over the next eight months that could change the most-likely scenario.

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<th>Impact on food security outcomes</th>
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<td>Availability of food declines on markets and at the household level</td>
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<td>Increased food grain supply to the local markets by the government and partner agencies as interventions to stabilize market prices</td>
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<td>Eastern Tigray and Amhara, most Afar, East and West Hararghe of Oromia, and central and western parts of Somali Region</td>
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<td>Below average Meher, riverine and irrigation agricultural harvest, low supply of grains to the local markets, decline in livestock production will result in reduction in overall household food consumption</td>
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<td>Rainfall</td>
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<td>Continued above average rainfall resulting in extensive flooding in lowland areas</td>
<td>Extensive livestock loss, destruction of infrastructure and crop destruction. This would lead to a reduction in herd sizes and decline in livestock product and productivity, below-average riverine agricultural harvest, and constrain market, health services and educational accesses. Thus, increase the level of acute food insecurity in these areas.</td>
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AREAS OF CONCERN

Eastern Plains of Tigray (EPL)

Current Situation

June to September Kiremt 2019 rains were highly irregular and below normal. Following the erratic start of Kiremt rains a sizable number of farmers were not able to begin planting within the normal planting window and many farmers planted nearly a month later than normal. Despite the delayed planting, area planted was near normal. Eastern parts of the livelihood zone did not receive adequate rains and experienced frequent dry spells and in some of the most extreme cases, crops failed to germinate or only partially germinated. Agropastoral households are facing difficulty feeding their livestock as pastureland is not readily available due to poor grass development and ability of households to access crop residues. In some of the worst affected areas households are facing difficulty access livestock feed. As a result, livestock body conditions are beginning to decline. In some of the worst affected areas there are reports of some households selling their livestock due to the lack of feed.

Staple cereal supply is seasonally low, while demand is atypically high and continues to increase as the harvest is delayed and households continue to rely on markets for food. As per data from Tseasie Tseada Emba Disaster Risk Management (DRM) office; maize grain prices in September 2019 were nearly 45 percent above last year and the five-year average. Likewise, livestock prices continue to increase as demand in the urban markets increases. Frewoyni market sheep prices in September 2019 were about 33 percent above last year’s prices and nearly 60 percent above the five-year average. Household income improved due to increased wage rate from urban casual labor. Local agriculture labor is highly constrained by limited availability of these opportunities. Staple cereal prices are increasing faster than wage labor rates and livestock prices, leading to a decrease in the ToT for both livestock and wage rate to staple cereals. This is limiting household purchasing power.

Since January 2019, three rounds of food assistance have been distributed to date, although the distribution was not completed timely with the planned ration size. As a result, humanitarian assistance provides short-term improvements for household food consumption. Households are currently experiencing the peak lean period and due to the poor access to food and income, Crisis (IPC Phase 3) is present.

Assumptions

In addition to the National level assumptions, the following assumptions apply to this area of concern:

- As crops faced dryness during the critical growth stage and will most likely result in a significant yield reduction in the 2019 Meher harvest. This will lead to an earlier than normal exhaust of from own stock. Nonetheless, the available production will be adequate to cover food from own production during the October 2019 to January 2020 and households are likely to face shortage of food from own production during from February to May 2020.

- Labor employment from agriculture will be available and increase in November/December 2019 as most of harvesting related opportunities will be available during these months. Although, availability is expected to be below average. Opportunities from other labor employment will remain unaffected.

Most Likely Food Security Outcomes

The poor rainfall performance during June to September 2019 critically affected the crop and livestock conditions which will likely result in significant yield reduction for the 2019 Meher harvest. Despite the below average harvest and household income, most poor households are expected to consume own foods. As a result, Stressed (IPC Phase 2) outcomes are expected the October 2019 to January 2020 period.
Starting in February/March 2020 households will begin to face an earlier than normal depletion of food from their own stocks due to the poor harvest. This accompanied by the anticipated increase in stable food prices and the seasonally low and below average incomes as a result Crisis (IPC Phase 3) outcomes are expected to emerge.

**North Wello East Plains (NWE)**

**Current Situation**

Despite some late season improvement rains, 2019 *Kiremt* rainfall remained below normal. Sorghum planting took place atypically late in May, resulting in farmers opted to plant a less preferred sorghum variety with planting occurring at normal levels. The second most important crop, teff, was planted in a timely manner and planting coverage was also near normal. As rains improved in September, the cropping conditions slightly recovered, but did not reach the normal growth stage. Late season rainfall prevented crop and pasture regeneration failure. Current estimates indicate the harvest will be about 50 and 75 percent of normal sorghum and teff production, respectively.

Currently, farmers are removing some sorghum stalks and weeds from their farm to provide green feed for livestock. After having a long-waited concern of water shortage, the moisture in September contributed to improving water availability for livestock. Therefore, no major stress on livestock feed and water has been observed. The livestock body condition is near normal, but dryness reportedly resulted in the reduction of livestock productivity.

The availability of sorghum in the markets is well below average, primarily due to the exhaustion of stocks from the previous below average harvest. Other staple foods on the market have also been below average due to increased demand. As such, prices of staple food exhibited an extraordinary increase from last year and the five-year average. As per data from woreda disaster risk management (DRM) offices, in September 2019, sorghum price in Woldia market are 112 and nearly 100 percent above last year and the five-year average, respectively. Likewise, despite no major abnormalities on the supply of commonly salable livestock, prices of livestock continued too gradually increase. Nevertheless, the rate of livestock price increases is not as fast as that of the increase in staple cereal prices. September 2019 goat prices in Woldia market was higher by 38 percent from last year and 36 percent from the five-year average. The terms of trade of goat to sorghum dropped by 35 percent compared to the same time last year.

The nutritional status of children 5 to 59 months is not of critical concern, although there are malnourished children in the livelihood zone. As per the TFP admission data from the Woreda Office of Health, in July 2019, the number of admissions has been stable for the past several months and there has not been a significant deviation from last year. This is mainly due to the ongoing TSFP programme by WFP, households cash income from different source contributing to improved food access, and their relative better awareness on childcare practices.

Most households are likely meeting the food needs and are unable to meet their essential non-food needs. As a result, Stressed (IPC Phase 2) outcomes are present.

**Assumptions**

In addition to the national level assumptions, the following assumptions apply to this area of concern:

- As crops faced dryness during the critical growth stage, it will most likely result in significant yield reduction in 2019 *Meher* production. This will lead to an earlier than normal exhaust of from own stock. Nonetheless, the available production will be adequate to cover food from own production through January 2020 and households are likely have limited to no food stocks from February to May 2020.

- Labor employment in November/December 2019 is expected to be below average as we anticipate harvest from own production will be below normal. Opportunities from other labor employment will remain unaffected.
Most Likely Food Security Outcomes

Availability of food from own production will improve starting in early-November 2019 as the fresh harvest contributes to enhanced household supply. Despite low income from agriculture seasonal availability of income from labor employment, additional cash from livestock sales and remittances are expected to continue increasing household’s ability to access food from October 2019 to January 2020. Decrease or stability of major staple food prices is expected to improve household access to market foods. As a result, Minimal (IPC Phase 1) is likely during October 2019 to January 2020. However, from February onwards households with below average production with limited to not food stocks are expected to be market dependent. Market supplies will most likely gradually decline leading to increased staple food price from February to May 2020. Combined with the seasonal shortage of income from labor employment households will be able to marginally meet their consumption need and will slide to Stressed (IPC Phase 2) during February to May 2020.

Southern and South-Eastern Pastoral and Agro-pastoral

Current situation

Deyr/Hagaya rainfall started in early October with heavy rains and some areas receiving 160mm or more of rainfall in the first two weeks of the season. As a result, October has been among the wettest on record. As per UNOCHA report in late October in two zones of Somali region (Shebele and Liben) excessive Deyr/Hagaya rains are causing overflow of Genale and Wabi Shabelle rivers. Localized flooding occurred in Oromio, SNNPR, and Somali Regions displacing 205,000 people and causing localized crop and livestock losses. An estimated 100,000 people have been displaced in Somali Region. Thus far, as per Multi-Agency Assessment, flooding washed away more than 1,500 livestock and other households’ assets. Moreover, flood affected different infrastructures including schools, health facilities, water points, roads and bridges, restricted people’s movement between the kebeles/woredas/zones. Additionally, food prices increased due to the restricted access and is anticipated to return to normal once access is normal.

Despite the positive performance of the 2019 Deyr/Hagaya, the past two poor seasons have negatively impacted water and pasture availability across pastoral areas, specifically in parts of lowland Bale Zone in Oromia and localized areas of Somali Regions. Pasture lands were depleted sooner than normal, forcing pastoralists and their herds to migrate farther to areas with better pasture and water. Such migrations resulted in high concentrations of livestock in some pocket areas, leading to an early depletion of resources in those areas. The long-distance trekking has negatively impacted livestock body conditions in some of these areas. However, heavy Deyr/Hagaya rains have started recovering water and pasture availability in areas of the region. According to the NDVI, in late-October, vegetative conditions are near to above the median.

Herd sizes are still below average following the 2016 drought with herd still recovering. In September and October 2019, cattle, which conceived in the 2018 Deyr/Hagaya and shoats which conceived in the 2019 Gu/Genna had a relatively below normal number of births. However, due to the delayed and abnormal distribution of March to May 2019 Gu/Genna rains and below average herd sizes, milk production has been below normal this year.

Agropastoral areas along the riverine areas of Somali region and Bale, Guji, and Borana Zones of Oromoia are preparing their land for planting in October following the timely start of Hagaya rains. Staple food prices remain atypically high, and livestock are fetching higher prices this year compared to previous years. In September, the price of locally produced maize in Degahbour, Cherati and Gode markets are 74, 68, and 90 percent above the five-year average, respectively. Additionally, locally consumed shoat prices in September 2019 are 72, 92, and 63 percent above the five-year average in the same markets, respectively. Despite prices being similarly above the five-year average in September, staple food prices are increasing at a higher rate than livestock prices, deteriorating the purchasing power of pastoral households.

Admissions to therapeutic feeding programs (TFP) increased from June to September in most of the southern and southeastern pastoral and agropastoral areas. Kelafo, Moyale, Qadadumo, and Adadle Woredas recorded the top SAM admissions during the month of July 2019. Admissions also increased in Dollo, Shabelle, Jarar, and Korehe zone of Somali region. The increase is attributed to irregular and delayed humanitarian interventions, including health and nutrition assistance programs, and livestock migration away from the homestead.

Along the border between Somali and Oromia Region, politically motivated and resource-based conflict persists and has resulted in the displacement of pastoralists since 2018. The current food consumption of the poor and very poor households has remained below normal, leading to increased livestock sales and relying on humanitarian assistance to cover food needs. However, assistance delivery is expected to be improving household food consumption in the short-term, but area-level impacts are difficult to assess. Therefore, most poor pastoral and agropastoral households are in Crisis (IPC Phase 3).
Assumptions

In addition to the National level assumptions, the following assumptions apply to this area of concern:

- Due to expected heavy October to December Deyr/Hagaya rains, flooding along the Shebelle River is expected, mainly in the lower parts in Shabelle, Kelafo, and Mustahi Woredas of Shebelle (formerly Gode) Zone. River flooding is expected to have a positive impact of increasing nearby pasture growth but a localized negative impact on crops already in the fields when the flooding occurs.

- The current heavy seasonal October to December Deyr/Hagaya rains expected to improve pasture and water in the area and this in turn expected to improve livestock birth, production and productivity. Although some localized livestock washaways are expected.

Most Likely Food Security Outcomes

The anticipated average to above average October to December Deyr/Hagaya rains will regenerate water points and pasture, improving livestock productivity. Though livestock holdings continue to be below average to support normal household income, milk production, and consumption of livestock. Seasonally normal milk production contributes to improved food availability as does access through market purchases funded by livestock and livestock product sales between October and January 2020. However, due to very low livestock holdings by poor households and damage of crop and livestock this is expected to reduce household food consumption. As a result, Crisis (IPC Phase 3) outcomes are expected during this period.

Despite the low number of livestock holding by poor households due to massive livestock death during 2016/17 drought, the successive seasonal improvement since then, is helping improve food and cash income. The anticipated favorable Deyr/Hagaya season will likely favor the improvement in livestock body condition and income access from livestock, contributing to the improvement of household food consumption. Most southern and southeastern pastoral areas will remain Stressed (IPC Phase 2) in the period from February to May 2020. However, areas with continued conflict which is likely to limited market access are expected to be in Crisis (IPC Phase 3).

East and West Hararghe Zones of Oromia Region

Current Situation

For many parts of the region, the lean season is atypically long extending through the end of September/beginning of October 2019, particularly in the southeastern and eastern parts of the region due to poor performance of the 2019 Belg/Genna season and below average 2018 Kiremt. However, late season Kiremt rainfall is supporting long-cycle Meher crop development and pasture regeneration. Heavy rainfall associated with hailstorms and flooding occurred in September seriously damaged crops in localized areas. As a result, about 5,000 hectares of crops were lost and about 11,500 households were displaced. This had localized effects on household crop production in the area.

Currently, pasture and water availability are near or above the median according NDVI. As a result, livestock body conditions are improving although movement of livestock for grazing and water is restricted in some areas like lowland of Doba, Gimbi Bordede, Babile, Chinakson and Meiso due to conflict. As a result, livestock conception and productivity are occurring at near normal levels across most areas. Maize and sorghum are the major staple crops in lowland parts of the zones and currently prices are significantly above average. Livestock prices are also increasing, but the ToT is not favoring pastoralists as livestock price are increasing at a slower rate than that of staple food price at local markets.

In some locations such as Chinaksen, Gursum, Doba and Meiso Woredas, there are still security concerns. Out of a nearly 400,000 conflict induced IDPs, about 250,000 have returned to their place of origin through government and partners’ joint effort. IDPs and most returnees are still having difficulty establishing livelihoods. Most IDPs and returnees have little access to incomes or food outside of humanitarian food assistance as their livelihoods have disrupted. Currently, JEEP and NDRMC are providing humanitarian assistance for the returnees, whereas WFP is supporting IDPs. In some locations such as Gimbi Borded, new houses are constructed for the returnees.

Food insecurity coupled with disease outbreaks is affecting the nutritional status of children and PLWs. The August 2019 TFP admission has shown an increase by 6, 31.6 and 12.6 percent compared to last month, the same month last year and five years average, respectively. The situation in East and West Hararghe is concerning as a larger proportion of the TFP admissions were reported. For instance, over 42 percent of the total TFP admissions for the region were reported from East and West Hararghe zones. Currently, many poor households, including IDPs/Returnees are classified in Crisis (IPC Phase 3).
due to reduced food access following localized below average production, increased staple food prices, and conflict related disruption of livelihood systems.

Assumptions

The most likely food security outcomes for October 2019 to May 2020 are based on similar assumptions as stated in the national overview.

Most likely food security outcomes

Staple food prices are expected to sharply increase, and poor and very poor households are expected to have difficulty purchasing food to meet their food needs as these household are expected to be market dependent. Some cash income from the sale of chat, increased livestock sales, and the sale of firewood and charcoal are expected to help households access incomes, although at below average levels. However, following the anticipated 2019 Meher harvest (between November 2019 to January 2020) household’s access to food and food consumption is likely to improve from October 2019 to January 2020. Although as the result of ongoing conflict and displacement most households in the lowlands and IDPs/returnees are likely to continue to face some food consumption gaps and remain in Crisis (Phase 3).

Between February and May 2020, most poor households in East and West Hararghe and pastoral households bordering Somali region are likely to exhaust their own production and will be dependent on markets for food. During this period, cereals supply to market expected to show a seasonal decline and consequently market prices are expected to steadily increase particularly after February 2020. Thus, poor and very poor households including IDPs/returnees are expected to be in crisis (IPC Phase 3) during this period.

Northern zones of Afar region

Current Situation

The July to September Karma rainy season was delayed by a month and poorly performed. However, late season rainfall in September and October improved rainfall deficits. In woredas where the rains performed poorly, water scarcity has been reported. Livestock pasture and water availability improved due to the late season rainfall in most parts of this areas, although remains broadly near or below the median. Livestock body conditions are currently near average in central and western parts of the area. Although despite late season improvements in pasture conditions, livestock births did not occur at normal rates. Livestock product availability, specifically for milk is below average due to the reduction in livestock births and decreased availability of pasture/feed. As a result, poor household food and income sources normally obtained from livestock is below average.

Market staple food supply is below average, due to the lean season in nearby Meher crop producing areas. Additionally, cereal prices in September 2019 either remained stable or slightly increased in most markets as compared to the previous month. For instance; maize prices in September 2019 in Abala and Awash markets reported at 45 and 100 percent above the five-year average, respectively. Goat prices in September 2019 in Jijiga and Shinile market were reported to be 50 to 109 percent and 38 and 61 percent above the same time last year and five-year average, respectively. Poor and very poor households in Northern parts of Afar are in Crisis (IPC Phase 3).

Assumptions

The most likely food security outcomes for October 2019 to May 2020 are based on similar assumptions as stated in the national overview.

Most Likely Food Security Outcomes

Despite the slight improvement from unseasonal September and October 2019 rainfall, the seasonal dryness in Jilal (Dec 2019 to Feb 2020) will cause further decline in food and income access from livestock. Most poor households will face limited milk access from livestock and rely on markets to fulfill their food and non-food needs. However, the prevailing high staple food prices combined with low livestock holdings is expected to decrease household’s purchasing capacity. Poor and very poor household are likely to face difficulty meeting all of their food needs. As a result, Crisis (IPC Phase 3) between October 2019 to May 2020 are expected.
MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE

Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🟢 indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🟢🟢 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

ABOUT SCENARIO DEVELOPMENT
To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.