Atypically high assistance needs persist due to multiple drivers exacerbated by COVID-19

KEY MESSAGES

• High levels of acute food insecurity persist across much of central and eastern Ethiopia due to compounding effects of COVID-19 related restrictions, continued drought recovery, atypically high food prices, conflict-related displacement, weather hazards, and desert locusts. Of greatest concern are areas in north-central Amhara, specifically the Wag Himera Zone, where people and livestock movement are significantly restricted and even with ongoing assistance households still face food consumption gaps, with Crisis! (IPC Phase 3!) outcomes expected through September.

• Other areas of high concern in the country include the lowlands of East and West Hararghe, lowlands of Bale, Guji, Arsi, and parts of Borena zone along the Oromia/Somali border, and parts of Somali Region. In these areas, Crisis (IPC Phase 3) outcomes are anticipated to persist through much of the projection period. This is largely driven by limited access to remittances, low income from casual and agriculture labor given restricted movement, and high food prices.

• Although belg rainfall was generally favorable, the national belg harvest is expected to be below average due to lower than normal area planted and damage to crops by desert locust. Rainfall from the belg season continued without interruption up until the mid-June start of the kiremt rains, favoring continued engagement in agriculture activities. However, engagement in these activities is somewhat below normal as migratory labor is limited and access to agriculture inputs is below average. Some crop losses associated with desert locusts and flooding coupled with the below-average area planted is also expected to lead to slightly below-average meher production.

• Seasonal forecasts suggest a below-average 2020 deyr season is likely. While pasture and vegetation conditions across much of the country are well above the median currently, and the above-median soil moisture may mitigate the impacts of the below-average deyr rains, a deterioration in livestock body conditions, productivity, and prices are still expected in late 2020. While it falls outside of the current projection period, it is worth noting that preliminary research suggests there is a possibility for a below-average March to May 2021 season as well, and past trends indicate food security conditions can deteriorate notably in the Horn of Africa with two consecutive below-average seasons.

NATIONAL OVERVIEW

Current Situation

Despite favorable rainfall over the past year across the country, humanitarian assistance needs are atypically high, with many poor households having difficulty meeting their minimum food needs in eastern parts of the country. This is driven by the continued slowdown of the economy, impacts of desert locusts on pasture and crops, and the indirect effects associated with COVID-19, including significant reductions in remittances and labor income.
Following the abrupt increase in the number of confirmed COVID-19 cases and associated deaths beginning in late May (Figure 1), the government started tightening control measures in areas where there were a high number of cases. According to the Ethiopian Public Health Institute, after Addis Ababa, Somali Region has the highest number of cases. As a result of these tightened measures across the country, there has been declining access to income and upward pressure on food prices, the latter largely due to increased transport costs.

The belg/gu/genna season, the main rainy season in southern and southeastern pastoral areas, started on time or even early in most areas; however, rains were slightly delayed over southeast Tigray and eastern Amhara. Cumulative belg/gu/genna rainfall was average to above average, although precipitation was a bit erratic, with a large portion of the rainfall falling between mid-April to late May. Large areas received more than 125 percent of average rainfall (Figure 2).

The continued favorable precipitation resulted in flash flooding and landslides in Dire Dawa and parts of Oromia and SNNP Regions in April and May. In late-April, the National Disaster Risk Management Commission (NDRMC) and OCHA reported that flash floods killed four people and damaged over 250 houses in Dire Dawa, killed livestock in Jinka town of SNNPR, and displaced nearly 50,000 households in Erer, Sitti, Nogob, and Korahe Zones of Somali Region. Additionally, flooding affected more than 470,000 people in SNNPR, Somali Region, and Dire Dawa, of which nearly 80 percent of the affected population is in Somali Region. Flooding also resulted in some displacement, damage to infrastructure and cropped areas, and livestock deaths.

Access constraints to seed and other agricultural inputs existed across belg producing areas due to COVID-19 related restrictions. As a result, the area planted for belg crops is estimated to be around 80 percent of average. The maize and sorghum harvest in belg-producing areas of Amhara and eastern Oromia are expected to begin at least one month later than normal due to late planting. Rainfall in May benefited short-cycle and long-cycle crops, although long-cycle crops will not be harvested until September/October. National belg production is likely to be 10 to 20 percent below average, largely driven by the below-average area planted, slightly erratic mid-season rainfall, particularly in northeastern Amhara and southern Tigray. In SNNPR, despite favorable rainfall, the desert locust upsurge led to some crop losses and belg production is likely to be below average.

The belg/gu/genna rains continued atypically, up until the timely start of kiremt rainfall. Kiremt rainfall has been largely favorable with cumulative June rainfall generally average to above average. However, there are some initial rainfall deficits along the Amhara/Tigray and Afar borders, and some areas bordering Sudan and South Sudan that should continue to be monitored. The broadly favorable rainfall has facilitated land preparation and planting for short-cycle meher crops.

Generally, meher planting is ongoing normally as possible since cropping households are doing whatever they can to participate in this season. Despite the favorable rainfall, access challenges to agriculture inputs, specifically in eastern meher
dependent areas where access to transportation is both restricted by poor roads and/or COVID-19 related restrictions. In western meher-dependent areas, agriculture activities are generally ongoing normally. Additionally, the lower flows of migratory agriculture labor associated with concerns and restrictions over COVID-19 are also impacting engagement in meher cultivation. Planted crops are developing normally.

Desert locusts in the first half of 2020 have been mostly isolated to areas of the Rift Valley, some western and southern areas, and the eastern half of the country (Figure 3). According to FAO, in May swarms were present in localized areas of southern SNNPR, Gambella, Somali Regions, and Dire Dawa with adult groups, hopper bands, and swarms moving into Afar and Tigray regions where egg-laying likely occurred. In June, also according to FAO, numerous hopper bands were present in these areas, as well as in the northern Rift Valley, parts of the northern highlands, and Somali region. In late June, the first signs of the northern migration of desert locusts from Kenya to Ethiopia were observed.

Control measures are ongoing via helicopters, aircrafts, and ground measures, although there are some difficulties due to restrictions associated with COVID-19 and flooding. Most of the control measures are ongoing in SNNP, southern Oromia, and Somali Regions, and Dire Dawa. Despite control measures, a second-generation of breeding is underway in southern Ethiopia and numerous hopper bands have formed, giving rise to immature swarms.

The hagga dry season is ongoing in south and southeastern pastoral areas; however, due to favorable gu/genna rainfall, pasture and browse is generally above average according to both field observations and remote sensing products (Figure 4). Although, there are some areas with negative anomalies where there were slight rainfall deficits. This is not of high concern, though, as pastoralists are able to move to areas with more favorable conditions.

Livestock body conditions remain favorable with no reports of atypical livestock migration nor livestock disease outbreaks. Due to camel and cattle births during the gu, camel and cattle milk is still available, though goats are no longer lactating. Livestock holdings are increasing as households continue to recover from the 2015/16 drought in most pastoral areas. However, large ruminant holdings – specifically camels – remain low due to the long time for herd recovery. This is particularly the case in Hawd livelihood zone of Somali Region.

In southern Afar and Sitti Zone of Somali Region, which follow different seasonal patterns than southern pastoral areas, consecutive near average seasons have contributed to improved livestock productivity and conceptions. In northern Afar, however, poor households’ livestock holdings remain lower than normal as three consecutive poor seasons have impacted livestock holdings and production.
According to CSA, annual inflation was nearly 20.0 percent in May, slightly lower than April’s inflation rate at 22.9 percent. This is the lowest inflation reported in 2020, although not significantly lower. The higher rate of inflation is related to the widening trade balance associated with infrastructure projects and the reduction in foreign currency reserves and liquidity. Most notably export earnings declined in the horticulture sector, losing nearly 25 million USD during the peak season. According to the International Growth Center, this coupled with other COVID-19 related shocks has decreased the GDP by 1.4 percent and household consumption by 1.3 percent.

Border closures and movement restrictions are limiting the flow of goods, livestock, and people mainly from the western to eastern parts of the country as well as in areas bordering Sudan and Tekeze river catchment of Tigray. Although the movement of some essential goods and humanitarian assistance is relatively normal. The movement of staple foods from surplus producing areas in the west to deficits producing areas of the country continues, although at a slower and lower than normal. As movement is more difficult, transportation for goods is also below average, contributing to above-average staple food prices. Since belg production represents a small portion of total annual production, the below-average harvest in June/July does not have significant impacts on domestic cereal supply.

As a result of the restricted movement and more broadly the depreciation of the ETB, maize prices in May are generally higher than in 2019 and five-year average. Panic buying has also contributed to price increases. According to the Ethiopian Trade and Business Corporation (ETBC), maize prices in April in Dire Dawa (Figure 5) and Hossaena (Figure 6) markets were 20 and 52 percent above the same time last year and 53 and 84 percent above the five-year average, respectively.

Livestock exports to the Middle East are lower than normal due to COVID-19 related restrictions including the cancellation of upcoming Hajj festivities. Despite the decreased exports, in southern and southeastern pastoral areas, livestock market supply is low as pastoralists aim to restock their herds from the 2016/17 drought. This coupled with the favorable livestock body conditions has led to higher than normal livestock prices. In May 2020, goat prices in Gode and Warder markets were 19 and 12 percent higher than the same time last year and 40 and 39 percent higher than the five-year average, respectively.

As a result of increasing livestock prices, terms of trade (ToT) for livestock to staple foods on average improved by about 16 percent compared to last year. However, livestock prices are not increasing at the same rate as staple food prices and, consequently, TOT remains below average.

Income from remittances and labor migration (Figure 7) in eastern and southern Amhara, northern and eastern Tigray, and northern SNNP and central and northern Oromia account for a significant portion of poor households’ income. These income sources have been significantly impacted by COVID-19 related restrictions, negatively impacting agricultural labor availability in western parts Oromia, Amhara, and Tigray and big commercial farming areas along the Awash river in Afar and parts of Bale and Arsi Zones of Oromia. As a result, the wage rate in many surplus producing areas increased due to low labor supply; however, to the contrary in eastern deficit producing areas of the country wage rates remain low.
Moreover, the restricted movement and weak construction activities in towns and urban areas have resulted in a decline in incomes for urban poor. According to a World Bank nationally representative phone-based survey monitoring COVID-19 impacts on households in Ethiopia in May, over 60 percent of urban households indicated a decrease in total income earned since the start of the outbreak. Based on the same survey, most urban households are not engaging in any coping strategies; however, 34.0 percent are relying on savings, 11.5 percent are reducing nonfood consumption, and 16.0 percent have decreased their food consumption.

Based on the same World Bank Survey, over 40 percent of households that rely on farming, livestock, or fishing has seen a decrease or loss of this income source since the start of the COVID-19 outbreak. Slightly over half of households among the reported poorest 20 percent saw a significant decrease in income with only 1.2 percent indicating a complete loss. On top of this, domestic or international remittances have decreased with nearly a quarter of households reporting a decrease and 40 percent reporting a total loss. Among rural households surveyed across the country, over 50 percent indicated a decrease or total loss in income.

In late June, there was an uptick in civil insecurity that led to protests across the country. Information on how this uptick has impacted livelihoods is limited and updates will be provided in future reporting. Given this insecurity and the large shut down of Addis Ababa on top of the already-occurring decrease in incomes for many poor urban households associated with COVID-19, food insecurity for poor urban households is of increasing concern. Prior to this security was relatively stable, at moderate levels in much of 2020, although insecurity continues along western and southern borders of Oromia region with Somali and Benishangul Gumuz regions, western borders of Amhara and Benishagul Gumuz, and Southern Oromia with SNNP region. These conflicts have resulted in nearly 2.0 million registered IDP. These populations’ typical livelihoods are disrupted and many face difficulty accessing sufficient food and income to meet their needs and are reliant on assistance.

According to UNHCR, in late-February, there are nearly 750,000 refugees in Ethiopia. Due to COVID-19 related restrictions to enter the country, the number of refugees has not significantly changed in recent months. According to WFP, refugees who are in camps receive almost 85 percent of their food needs through assistance. Additionally, associated with the global
economic downturn, many people have been returning to Ethiopia. Estimates from IOM indicate that between April and mid-June, nearly 35,000 Ethiopians have returned from abroad. Returnees in June were required to quarantine for 14-days and typically return to their place of origin where they have family.

To account for some delays in disruptions of humanitarian assistance delivery due to COVID-19, specifically implementing measures to prevent the spread of the virus, humanitarian actors are distributing 2 rounds of assistance at once for Rounds 1 to 4, for about 7.2 million beneficiaries. The National Disaster Risk Management Commission (NDRMC), World Food Programme (WFP), and Joint Emergency Operation Program (JEOP) are currently distributing Rounds 1 to 4 of emergency humanitarian assistance. Some operators have started Round 3/4 distribution which is likely to improving food access in parts of Oromia, Amhara, and SNNPR. Rations distributed covers about 70 percent of a beneficiaries’ kilocalorie needs. However, some operators have pipeline breaks resulting in irregular distributions. Additionally, flooding in some southern parts of the country also resulted in some delays in distribution.

Delivery of PSNP transfers are atypically delayed by about 2 months due to COVID-19 related restrictions including physical distancing and delays to the transportation of food from the primary distribution point to beneficiaries.

According to ENCU, in April, nationwide 30,000 children had been admitted to a therapeutic feeding program for the treatment of Severe Acute Malnutrition (SAM), which is slightly above normal (Figure 8). The largest caseloads were in Gambela, Tigray, and Amhara. ENCU and partners indicate in areas of northern Afar, eastern Tigray, and isolated areas of Somali, eastern Amhara, Segen, and Konso areas of SNNP, nutrition outcomes are relatively poorer than in other areas of the country. The largest increase in TFP admissions between March and April was in SNNPR and Gambela.

In the western and central surplus-producing areas, households continue meeting their food and non-food needs and remain at Minimal (IPC Phase 1), except some localizes areas where there are high concentrations of IDP and refugees, where Stressed (IPC Phase 2) outcomes are present.

In southern and southeastern pastoral areas of the country, food access for poor households remains constrained due to continued below-average herd sizes and livestock sales, decreases in remittances and labor income, and high prices for imported and locally produced staples. Poor households in many of these areas continue to face food consumption gaps and are experiencing Crisis (IPC Phase 3) outcomes. Although Stressed (IPC Phase 2) outcomes are present in eastern parts of Degahabur, Jijiga, southern parts of Gode, Fafan, and Shinile zones as incomes and market access are relatively better.

Similarly, access to food and income from the sale of livestock in northern Afar remains below average, while low income from other sources continues to constrain household food access due to COVID-19 related restrictions. As a result of exhausted food stocks, low income from labor, increased staple food prices, household purchasing power is low across much of the region. Although consistent delivery of assistance in the past month has resulted in the improvements in food security and Stressed! (IPC Phase 2!) outcomes are present.

In the lowlands of southern, central, and eastern Oromia, the Rift Valley of SNNPR, the lowlands of Waghimra and Tekeze river catchments of Tigray, June coincides with the start of the lean season for the majority of these areas. Many poor households across these areas have already exhausted their 2019 meher stocks and are reliant on market foods. Access to income from agricultural labor is limited due to COVID-19, and staple food prices are limiting poor households’ ability to access food. As a result, many of these areas are facing Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes. Areas that are facing Stressed (IPC Phase 2) are areas where income is generally more favorable.

In parts of the Tekeze River catchment of Tigray and lowlands of Wag Himra, even with PSNP and ongoing humanitarian assistance, food consumption gaps still exist and Crisis! (IPC Phase 3!) outcomes are present. This is an area of high concern as consecutive years of poor production have left households reliant on market foods for atypically long periods of time. Households in this area of the country are highly dependent on migratory labor, and livestock sales for income to purchase food. Due to fears of COVID-19, COVID-19 related restrictions, and insecurity, household mobility is extremely limited, and
households have extremely restricted ability to access income to purchase food. Although, regular delivery of humanitarian assistance to this area is minimizing food consumption gaps although they are expected to continue.

Urban poor households’ income has been negatively impacted by the COVID-19 restrictions and the decrease demand for casual laborers. As prices of staple foods have increased there is an increase in the populations that are unable to meet their non-food and food needs. While most urban areas are still expected to be in Minimal (IPC Phase 1), specifically Addis Ababa, there are more populations than normal facing Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes.

Assumptions

The June 2020 to January 2021 most likely scenario is based on the following national-level assumptions:

- Based on global trends and available information from leading health experts including the WHO and the London School of Hygiene and Tropical Medicine (LSHTM), the global COVID-19 pandemic will most likely continue during the projection period, and the number of cases is likely to continue to increase due to both the spread of the virus and increased testing. According to the Ministry of Health, community transmission is expected to continue, and the number of confirmed cases and deaths are likely to increase in the short to medium term. Modeling by the LSHTM indicates COVID-19 cases are likely to peak between July and September, which coincides with kiremt rainfall and the start of the meher harvest.

- The State of Emergency associated with COVID-19 is expected to continue through September 2020 based on information from key informants and media. Among the measures in place associated with the restrictions are banned inter-regional public transport and public gatherings. Although, as the number of confirmed cases increase both federal and regional governments are expected to tighten the different measures to curb the spread throughout the outlook period.

- Economic conditions are expected to deteriorate further with the expected contraction of the macroeconomy. The government’s ability to acquire hard currencies for debt repayment and importation of goods will be constrained. As a result, the ETB is expected to depreciate further while the inflation rate is expected to remain high. Based on projections from the IMF, average annual inflation is expected to be similar to 2019.

- The flow in terms of quantity and frequency of remittances is likely to decrease in line with the global economic downturn. This will most likely lead to a decrease in income among many poor households. This is an especially important income source among pastoral households in parts of Somali and Afar Regions.

- The kiremt rains from June to September are expected to be above average with average Karan/Karma rains from July to September over northern Somali and Southern Afar. In July/August, flooding is anticipated, particularly over flood-prone areas including areas of Awash, Lake Tana, Abay, Baro-Akobo, Shable, and Omo-Gibe catchments and plain areas.

- Rainfall for the 2020 deyr/hagaya season in southeastern Ethiopia is expected to be below average.

- Based on third-generation breeding in June, the rainfall forecast, and desert locust projections by FAO, the desert locust upsurge is most likely to persist through at least January 2021. Vegetation and climatic conditions through September will favor desert locust breeding in parts of northern and western Ethiopia. Pasture losses will most likely be offset by rainfall that regenerates vegetation. Nevertheless, localized pasture losses are likely, especially in insecure areas where control operations are limited. From October to December, damage from desert locust coupled with below-average rainfall will likely lead to significant losses of crop and pasture in bimodal areas in the absence of large-scale control measures.

- National meher production is likely to be slightly below average. Despite the favorable rainfall forecast, localized crop losses associated with desert locusts, flood-induced damage, and below-average access to agriculture inputs will most likely lead to slightly below-average production.

- Livestock exports to the Middle East are expected to be lower than last year and average due to the cancellation of the Hajj, which will have the most impacts on pastoral households in the Somali Region. However, livestock prices are projected to remain relatively stable and above average due to the better livestock body conditions and reduced market supply as households limit sales to increase herd size from the 2016/2017 drought.

- In southern and southeastern pastoral areas, pasture and water sources are expected to be average to above-average through at least October/November. However, in late November, both pasture and water availability are expected to deteriorate through the end of the scenario period associated with the below-average deyr. Livestock body conditions
and productivity are expected to be normal through November, after which time they will likely deteriorate; herd sizes are expected to remain below average.

- In northern parts of Afar, livestock body conditions and productivity will remain slightly below average throughout the projection period though conditions are expected to slightly improve compared to previous poor seasons. In northern Afar, a medium to lower rate of camel and cattle calving and kidding is expected due to two consecutive below-average seasons while sheep and goat births will likely be average. Thus, in northern Afar, milk availability is expected to seasonally improve, though remaining below average following average \textit{karma} rainfall.

- The below-average \textit{belg} harvest will most likely affect the supply of grains, most notably in Amhara and Tigray, though market supplies across much of the country remaining atypically low through September. At the start of the \textit{meher} harvest in October, market supply is expected to be near normal levels in western areas, while in central and eastern areas market supply is expected to be below average though improving following the relaxing of movement restrictions associated with COVID-19.

- Prices of locally produced staple cereals, such as sorghum, maize, barley, and teff, are likely to follow seasonal trends although remain above average.

- Agricultural labor opportunities are likely to be slightly below average, due to the expected increased competition of unskilled daily laborers. Additionally, wage rates for agriculture will remain low through at least September. Agriculture labor opportunities are likely to continue to improve in October as construction activities resume with the relaxation of COVID-19 associated restrictions.

- Income from self-employment, including petty trading, are expected to remain below average in rural and urban areas during the scenario period due to COVID-19 related movement restrictions and increased competition.

- Insecurity and the number of displaced people across the country are expected to slightly increase due to the increase in insecurity associated with ethnic and political tension. Additionally, the number of refugees entering the country is expected to remain relatively stable. The number of returnees from the Middle East and neighboring countries is expected to remain above average throughout the outlook period.

- The current cholera and malaria outbreaks, predominately in SNNPR, are expected to continue and contribute to the increase number of cases of acute malnutrition, particularly from October to January when water shortages are likely. In addition, the disease burdens will likely force households to divert their limited income and time that would have been used to procure food to seek treatment.

- Based on last year’s distribution of PSNP, transfers typically complete in August. However, this year due to delays in distribution PSNP transfers are expected to be complete in September.

- Based on historical knowledge and current distribution information, there are likely to be a total of 5 Rounds of food distribution in 2020 instead of the planned 7. Planned and likely beneficiaries by Round was only available for a single operator through September. Based on this plan, assistance is expected to reach at least 25 percent of the population, meeting at least 25 percent of their kilocalorie needs in parts of Amhara, Oromia, and SNNPR.

- According to WFP, there is likely to be a pipeline break in August for assistance delivery due to limited funding, specifically in refugee camps. As funding becomes limited ration reductions are likely.

\textit{Most Likely Food Security Outcomes}

Assistance needs are expected to remain high for the June to September period as this is the peak of the lean season across the higher populated areas of the country. Income from remittances and agricultural labor during \textit{meher} cropping is expected to be below normal due to COVID-19 related impacts. From June to September, in the Tekeze River catchment in eastern Amhara and Tigray Regions including the TSG livelihood zone, humanitarian assistance is expected to decrease food consumption gaps; however, food consumption gaps are still expected and \textit{Crisis!} (IPC Phase 3!) outcomes are likely until the harvest. It is expected that significant limitations to casual and migratory labor, which typically are a significant portion of poor households’ income to purchase market foods during the lean season, is driving extremely limited incomes for poor households. In September/October, as the \textit{meher} harvest is available, \textit{Stressed} (IPC Phase 2) outcomes are likely.
Despite favorable livestock conditions, poor households in southeastern pastoral areas, incomes are generally low due to lower remittances and income from livestock and milk sales. Moreover, the anticipated below-average October to December deyr/hagaya season in southern and southeastern pastoral areas is expected to weaken livestock productivity, further decreasing food and income availability. Additionally, staple food prices will remain higher than normal, leading to poor purchasing power. As a result, many poor households will face difficulty meeting their basic food needs. In Dollo, Korahe, and eastern Jarar zones, and in areas bordering Oromia and Somali region, many households (particularly IDPs) will continue to face food consumption gaps and the majority of these areas will likely be in Crisis (IPC Phase 3) throughout the scenario period. Stressed (IPC Phase 2) outcomes are expected from June to September in areas where incomes are relatively more favorable as households have will likely have relatively better access to crops and incomes.

Some lowland areas of East and West Hararghe Zones of Oromia Region are expected to have an average performance of meher rain. However, due to COVID-19 related restrictions, reduction in household income and likely increases in staple food prices which are expected to limit access to food. Although ongoing humanitarian food assistance is likely to improve outcomes from June to September to Stressed+ (IPC Phase 2!) in some areas. Crisis (IPC Phase 3) outcomes are expected to continue in other areas. With the harvest in October, these areas are expected to meet their food needs and face Stressed (IPC Phase 2).

Following the anticipated average June to September karan/karma rain, water and pasture availability is expected to improve in northern Somali and southern Afar Regions. Household incomes and milk access will increase, most notably in southern Afar. As a result, Stressed (IPC Phase 2) outcomes are expected. However, in northern Afar, where in addition to pastoralism, households rely on remittances and income from salt mining which have been negatively impacted by COVID-19 restrictions. This coupled with continued high prices is expected to lead to food consumption gaps among poor and very poor households. As a result, Crisis (IPC Phase 3) outcomes are expected throughout the scenario period.

On the other hand, with the long dry season from June to September in Borena and South Omo Zones, and anticipated desert locust invasion, household food and income access from livestock is expected to decline. Therefore, poor households in lowlands of Borena and lowlands of South Omo Zones will remain or move into Crisis (IPC Phase 3) from July to September. Stressed (IPC Phase 2) are expected in October as access to food improves as the harvest becomes available in the markets.

Poor households along the Rift Valley in SNNPR and central Oromia are able to address their minimal food needs with ongoing humanitarian assistance, they will be Stressed (IPC Phase 2!) from June to September. Poor households were lost their incomes from agricultural labor during the belg will likely face continued decline for the upcoming meher season as staple food prices are likely to rise. Therefore, these areas will be to Crisis (IPC Phase 3) from July to September 2020. However, following the Meher harvest, these areas will move to Stressed (IPC Phase 2) from October 2020 to January 2021.

Generally, urban areas are expected to remain in Minimal (IPC Phase 1). Although, some poor urban households are expected to continue to have difficulty meeting their non-food needs and are likely to be in Stressed (IPC Phase 2). Households with little to no savings that live hand to mouth and lost their income are likely to continue to face difficulty meeting their food needs and Crisis (IPC Phase 3) outcomes are anticipated through September as restrictions are likely to continue to be in place. As restrictions are loosened in October, urban poor households are expected to access incomes although still at below-average levels. This will improve household access to market food, leading to general improvements in acute food insecurity.
Events that Might Change the Outlook

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

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>An expected increase in area coverage and number of people infected by COVID-19 and the continuation of restriction measures.</td>
<td>In the event COVID-19 restriction measures continue beyond September, it is expected that while the harvest in much of the country will still likely improve food consumption, household access to non-food items would decrease as prices continue to atypically increase. Additionally, further impacts on income-earning would be expected. Households that are completely reliant on market foods would likely face Crisis (IPC Phase 3).</td>
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<tr>
<td>Somali Region</td>
<td>Failure of the deyr where rainfall is 50 percent or more lower than normal.</td>
<td>Water and pasture availability would deteriorate faster than expected as would livestock body conditions and productivity. Pastoralists ability to access food and income would likely decrease and Crisis (IPC Phase 3) or worse outcomes would be present among more households.</td>
</tr>
<tr>
<td>National</td>
<td>Desert locusts control measures are not effective and there are large scale losses</td>
<td>Prices of locally produced staple foods would be expected to increase, and pasture would likely deteriorate further. This will reduce food and income access of many households; this would result in more households facing Crisis (IPC Phase 3) or worse outcomes.</td>
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AREAS OF CONCERN

Tekeze Lowland Sorghum and Goats Livelihood Zone (TSG)

Current Situation

Most households exhausted their feed reserve from crop remains and were relying on the purchase of stalks and hay at a very high price to feed at least small and productive animals. On the other hand, farmers are coping with the severe shortage of livestock feed and water by migrating to areas where there are perineal river courses. Migration is primarily within the livelihood zone or otherwise in nearby administrative woredas within Wag Himra zone. Stress on livestock feed and water supply led to reduced body condition and productivity of livestock. Starting from the end of the second dekad of May 2020, the rains in the livelihood zone improved and brought relief to the long-stayed moisture stress. In June, livestock feed and water supply started to improve, improving livestock body condition and productivity.

Consecutive very poor seasons have affected crop production in the livelihood zone. The contribution of own production as a food source is very limited and poor and very poor households are increasingly relying on other sources to meet food needs. Livestock sales are limited due to the COVID-19 related movement restriction and while there has been an improvement in body conditions, they are still below normal, which undermine trade activities. Only very few traders are coming into the area for livestock purchases. Likewise, income from the sale of honey declined as people who used to travel to the area and buy honey made their travel less frequent due to the COVID-19 pandemic. Other employment and self-employment activities have also been impacted the pandemic. Laborer’s who migrated to other parts of the country for income generation have also returned to the livelihood zone and this has negatively affected the wage rate in the area.

Poorer households become market reliant shortly after the meager Meher 2019 crop harvest. It was typical that staple cereal prices decline immediately after the main harvest. However, those seasonal price decline in the months following harvest
have not been observed as continuous as the supply is constrained and the demand remained prevalent with the number of households covering food from own production become less and less. The increased demand along with other factors; like the inflation and threat of COVID exacerbated the price increase of the staple foods. As per the price data from the Zone Disaster Risk Management (DRM) office, the sorghum price in April 2020 in Sekota market was higher by 5 percent from the preceding month. When compared to last year and last five-year average the recorded price was higher by 13 and 25 percent respectively.

Livestock prices between October 2019 and February 2020 decreased as livestock body conditions also deteriorated. Goat prices in February were the lowest they have been in the past two years. In March and April, goat prices increased following the drastic decline in the market supply associated with COVID-19 announcement and movement restrictions. The gap between low supply and increased demand further expanded as the Easter festivity increased demand resulted in higher livestock prices. In Sekota market, goat prices in April were 15 percent higher than March and at the same time last year and were 24 percent higher than the five-year average. Although the prices are higher than normal, livestock sales are down.

TFP admissions have notably increased since the 2019 lean season despite all the efforts rendered by the WFP/TSFP program in the provision of continuous support of supplementary food (Figure 10).

PSNP and emergency food assistance are the two major assistance programs in the livelihood Zone. In Wag Himra Administrative Zone of Amhara, currently, 106,530 people of which 57,272 beneficiaries are in the TSG crossed woredas are being supported by emergency food assistance. JEOP is the sole operator of emergency food assistance in the Administrative Zone as a whole and so far, two rounds of assistance were dispatched and distributed and round three and four are dispatched and distribution is ongoing. The total PSNP beneficiary number in the administrative zone is 151,869 people out of which 59,798 are in the TSG livelihood crossed woredas. Currently, Round 3 and 4 of PSNP were completed out of which one round was cash and the other rounds are in-kind transfers.

Even with sources of income and food including PSNP, which is estimated to constitute a large proportion of food needs among poor households, poor households face food consumption gaps despite ongoing assistance (estimated at a 70 percent ration monthly), due to the limited mobility of households to access casual and migratory labor to access food, below average 2019 meher, and high food prices. It is expected that households face significant limitations to these sources of income, which are used to purchase food at markets. Households that receive PSNP and those that receive humanitarian food assistance are different and while these assistance programs help to fill consumption gaps, food consumption gaps continue.

In the absence of assistance, which is currently constituting a significant portion of food needs, households would be consuming less than 80 percent of food needs, representing larger food consumption gaps, regularly as most sources of food and income are limited due to the continued inability to engage in livelihood activities resulting from ongoing insecurity, COVID-19 related restrictions, and poor access to markets. In the prolonged absence of this assistance, it is expected that poor households would rely significantly on the consumption of wild foods, and limit meal quantity and frequency, as well as expand on charcoal sales; however, overall many would begin to engage in more severe coping strategies including migration of households. As a result, Crisis! (IPC Phase 3!) outcomes are present.

Assumptions

- According to FAO, as hopper bands are observed in northern Afar region and Yemen. Thus, there is an increased likelihood of desert locust invasion in the lowland parts along the Tekeze river catchment in the livelihood zone and the surrounding during the main Kiremt planting and growing periods.

- Income from agricultural labor is expected to be limited through September; however, as many laborers return to their own locality, labor availability for agricultural labor during weeding/plowing and harvesting is expected to increase although is not expected to be normal. Household income from other self-employment activities is also expected to decline due to the pandemic and associated restrictions.

Most Likely Food Security Outcomes

During the June to September period, households typically rely on casual and migratory labor for income to purchase food. However, this income source is expected to continue to be significantly limited due to COVID-19 related restrictions. The high staple food prices are expected to further limit household food access. The prices of cereals are likely to increase throughout June to September 2020 which will lead to increased food consumption gaps. Household food consumption
gaps in the absence of assistance are likely to be significantly limited with households consuming less than 80 percent of their food needs. It is expected that households would rely on the consumption of wild foods, limit meal frequency and quantity, and poor access to markets, although many would likely engage in severe coping strategies such as migrating. As a result, Crisis! (IPC Phase 3!) outcomes are likely to persist through September as humanitarian assistance is likely to prevent more severe outcomes.

Food security of households is likely to improve with the support of average to above-average Kiremt 2020 contributing to near normal harvest, except the loss which is likely to be resulted by the desert locust invasion. Households will benefit from crop sale, livestock sale, and labor employment, although access to these sources is likely to be constrained due to the economic, health, and social disruption which is driven by the COVID-19 pandemic. Therefore, in the earlier months of Meher 2020, households are expected to improve the food consumption gaps but considerable households are likely to face expenditure deficit for essential expenses. As a result, Stressed (IPC Phase 2) outcomes are expected from October 2020 to January 2021.

Events that Might Change the Outlook

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSG livelihood Zone</td>
<td>A late start or below-average June to September Kiremt rains</td>
<td>Significantly affect (lower) area of planted, impact crops growth and development and will result in below normal harvest and worsen food availability and access.</td>
</tr>
</tbody>
</table>

Afder Pastoral Livelihood Zone (AFP)

Current Situation

Both the satellite-derived rainfall estimates and field reports confirm favorable gu rainfall performance improving pasture, browse, and water availability in the livelihood zone. Although, there was some subsequent flooding. Specific damage on crops and livestock is not available specific to this livelihood zone. In Somali Region, according to UNOCHA, flooding damaged nearly 9,000 hectares of land along riverine areas and resulted in over 2,000 livestock deaths.

Currently, milk yields are average per animal, though total milk availability is lower than normal as herd sizes are estimated to be about 30 to 40 percent lower than the reference year. This is due to losses during the 2016/17 drought and subsequent poor seasons, in 2018, limiting herd growth.

While desert locusts have covered much of the Somali region for the first half of 2020, there have been minimal reports of desert locusts in this livelihood zone, and pasture damage is limited. However, in neighboring areas of Oromia where larger crop damage was reported, and associated with the reduction in trade flows, market supply is lower than normal.

Since the announcement of the first COVID-19 case in the Somali region, there have been social and economic impacts. Casual labor opportunities and trade activities within this livelihood zone and neighboring areas are lower than normal due to both some insecurity and COVID-19 related restrictions. The supply of imported food items (rice and sugar) has decreased while prices continue to increase. Moreover, remittances, which are an important income source and often used as a coping strategy, have dropped significantly.

The generally favorable seasons in the past couple of years have contributed to favorable livestock body conditions and production as well as the gradual improvement of herd sizes. This has led to increases in livestock prices and improved shoal to cereal ToT for pastoralists. Although, many households are not selling livestock, so they continue to regenerate their herd sizes. In April, the price of the 50 kgs of maize in Chereti was 825 ETB, which is 37 and 82 percent higher from the same time last year and the five-year average, respectively. While the price of local goats during the same time was 1,500 ETB, which is 43 percent and 107 percent higher than the same time last year and the five-year average, respectively.
On the other hand, the disruption in the supply of imported commodities following the start of the COVID-19 pandemic market shortages have been reported and prices have reportedly increased most notable for staple cereals and imported goods. Somali region. For example, imported sugar prices in May in Jijiga-Fafan market increased by nearly 10 percent from April to May and was 32 and 28 percent above the five-year average and last year at the same time, respectively. Additionally, in May, prices in Afder-Charti Market showed a 45, 20, and 4 percent increase compared to the five-year average, last year, and April, respectively.

Furthermore, the onset of the pandemic resulted in movement restrictions, resulting in decreased trade flows, decreased employment opportunities, and a reduction in incomes.

According to ENCU, the regional SAM admissions decreased by nearly 9 percent in March and April 2020 regionally. However, when comparing TFP admissions for January to April to the same time last year and the five-year average, admissions are much higher. The largest increases and highest caseloads continued to be observed in Afder Zone as well as in Dawa, Korhe, Nogob, and Shebelle Zones. The humanitarian assistance delays, including TSFP food distribution due to flooding and COVID-19 restrictions, were main factors reported that attributed to the rise in the TFP admissions in these parts of the region.

A new incidence of conflict was reported starting in March/April in Afder Zone. This conflict is associated with natural resource sharing and to some extent political induced land ownership issues. Reports between different Somali pastoral communities and between Somali and Oromo communities were also reported in May. This increase in conflict has restricted livestock movement for grazing and watering.

Based on secondary information, humanitarian assistance distribution to some of the woredas within this livelihood zone has not begun for 2020, while the prioritization committee approved the dispatch and distribution of Rounds 3 and 4 beginning in June 2020. Based on key informants, in AFP livelihood Zone it is only in Dollo-bay and Goro-bakaksa woreda where distribution took place as of the third week of June.

Despite, above normal Gu 2020 (April to June) rains that improved pasture, browse, and water availability, the current herd size is below average from the reference year due to 2016/17 drought-related deaths and excess sale. Moreover, currently, the number of milking animals are below normal in proportion, compared to the number of pregnant once. This resulted in a reduction in income from livestock and livestock product. This reduction coupled with, the COVID-19 related impacts, higher price for both imported and local staple food, declined remittances is resulting in Stressed (IPC Phase 2) outcomes across much of the area with Crisis (IPC Phase 3) outcomes in areas bordering Oromia.

Assumptions

The most likely scenario for June 2020 to January 2021 is based on the national assumptions and the following:

- Despite, the impact of the expected below-average deyr/hagaya season, a large number of camel births are expected during this season. However, due to pasture and water shortages, camel productivity is expected to be below average.

Most Likely Food Security Outcome

Crisis (IPC Phase 3) outcomes are expected throughout the scenario period. From, June to September, household access to food is expected to be limited as the result of below-average access to livestock products; however, more significantly remittances and sales of cattle overseas. This is going to lead to food consumption gaps. Additionally, in attempts to meet their food needs households are expected to engage in an excessive sale of livestock.

With the anticipated below-average deyr, pasture, browse and water is expected to deteriorate. With an additional impact of desert locust invasion and assuming the lingering impacts of COVID-19, it is unlikely food consumption will improve in the second scenario period. Although larger numbers of large livestock are expected to give birth in the deyr, due to the below-average rainfall, production and productivity are expected to be minimal level. Therefore, poor and very poor households are expected to remain in Crisis (IPC Phase 3) through January 2021.

North-East Agro-Pastoral Livelihood Zone (NAP)

Current Situation

The February to May Belg/Genna rains over most parts of the Oromia Region started on time although was below to near average. In some lowland woredas of the livelihood zone of Bale and East and West Hararghe zones, there was a four to six-
week dry spell in April and May. Overall, planting was late for *belg* crops due to below-average rainfall. This also delayed planting of long-cycle *meher* crops. As of mid-May, slightly over 80 percent of the normal area was planted against in East and West Hararghe. Moreover, heavy rainfall in May and associated hailstorm and flooding caused damage to planted crops. The ongoing rains are favoring late-planted long-cycle *meher* crops.

Currently, planted crops are in good condition and the vegetative and flowering stages. Perennial crops such as chat, coffee, and tree fruits are also developing well. However, pests such as aphids and desert locust have caused some damage, although not widespread.

Normally, during this time of year, staple foods are well supplied from central, southern, and western parts of the country. However, this year, the supply of grain has declined, leading to a rapid increase in prices. This is largely due to COVID-19 movement restrictions, higher inflation, and some insecurity in western areas of the livelihood zone.

As a result, the price of maize and sorghum in Chiro market increased by about 5 percent between May and June. Maize and sorghum prices are 34 and 23 and over 100 percent higher than the same time last year and the two-year average, respectively. On the other hand, livestock supplies are relatively stable; however, prices have been declining since last year. In May 2020, goat prices in Chiro market were around 10 percent higher than in April and the same time last year and 65 percent above the two-year average. More importantly, the goat to maize/sorghum TOT (Figure 13) is disfavoring the pastoral households and limiting the purchasing power, particularly for poorer households.

Levels of acute malnutrition typically increase during the lean season in this livelihood zone mainly due to food insecurity at the household level and health-related factors. Since the beginning of this year, measles, cholera, AWD, and scabies continue in affecting people in East and West Hararghe, Arsi, West Arsi, Bale, Guji, West Guji, and Borena Zones of Oromia. This resulted in high levels of acute malnutrition. According to the Zonal Health Department, the health-seeking behavior of the community is declining due to fear of contracting COVID-19. Additionally, health service provision is also declining due to lack of proper PPE for health workers and has contributed to the decrease in TFP admissions in the livelihood zone as there was no proper screening.

Most poor and very poor households have exhausted their own production from 2019 and are reliant on markets for food. Households are purchasing food by income earned through the sale of livestock, firewood/charcoal, and chat. Income from these sources has declined partly due to movement restrictions, decreased demand, and lower wages of daily laborers. Moreover, at this time of normal year, seasonal agricultural labor opportunity and corresponding wage rate improve as agriculture activities are ongoing; however, currently, this did not occur this year as seasonal labor has been negatively impacted by COVID-19 restrictions and economic downturn. Furthermore, the emerged COVID-19 pandemic is disrupting large- or small-scale investments that used to accommodate a significant number of very poor and poorer households, disrupting livestock market prices, and self-employment business activities.

As a result, households purchasing power is lower than normal for these households and would face food consumption gaps in the absence of assistance. Although, available information indicates assistance is ongoing and Stressed! (IPC Phase 2!) outcomes are present across much of the area.

**Assumptions**

The most likely scenario for June 2020 to January 2021 is based on the assumption in the national overview for this area of concern.

**Most Likely Food Security Outcomes**
During the peak lean season from June to September most households, the poor, are expected to totally rely on markets for food. As market supplies are expected to be limited mainly due to imposed movement restrictions and insecurity. This will also lead to higher transportation costs and continued price increases. Furthermore, poor households are expected to earn limited income from the sale of livestock, firewood,charcoal, chat, and some fruits and vegetables and labor which is not expected to be adequate to cover their food expenses. As a result, Crisis (IPC Phase 3) outcomes are expected to persist.

Food security is expected to improve with the *meher* harvest starting in October as households start access own foods. However, it is expected that household incomes are expected to be below normal and households are not expected to meet their non-food needs. As a result, Stressed (IPC Phase 2) outcomes are expected between October 2020 and January 2021.

*Events that Might Change the Outlook*

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

<table>
<thead>
<tr>
<th>Area</th>
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<tbody>
<tr>
<td>East and West Hararghe, Lowland of Bale, Borena, Guji, West Guji, Arsi and West Arsi zones-</td>
<td>Much Below Average and early cessation of the 2020 Kiremt seasonal rainfall</td>
<td><em>Meher</em> production would be below normal. Most poor households will not have access to food and income and a likely increase in area-level Crisis (IPC Phase 3) outcomes.</td>
</tr>
</tbody>
</table>
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.