KEY MESSAGES

• The severity of food insecurity in Ethiopia is among the worst globally, with record-breaking food assistance needs driven by the impacts of prolonged drought and ongoing insecurity. Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes will likely be widespread in northern, central, southern, and southeastern Ethiopia through at least January 2023. Multiple areas of the country face the potential for more extreme outcomes associated with high levels of acute malnutrition and hunger-related mortality. Scaled-up and sustained food assistance, as well as unfettered humanitarian access, is needed immediately to save lives.

• Tigray is expected to remain the area of highest concern until the start of the meher harvest in October. While households continue to engage in agricultural activities within Tigray as they are able, seasonal labor migration to West Tigray and the rest of Ethiopia— which is usually a critical source of income— is not a viable option due to insecurity. Food prices are also exceptionally high, and given that most households must purchase nearly all of their food until the harvest, anecdotal reports suggest they are using high and severe levels of coping to survive. Recent humanitarian aid distributions are mitigating food consumption deficits among recipients, but current levels remain far below the scale of need. Emergency (IPC Phase 4) outcomes, at a minimum, are expected to be widespread, and more extreme outcomes will likely remain possible through the peak of the lean season in September. In October, the harvest is expected to stabilize food consumption somewhat and sustain Emergency (IPC Phase 4) outcomes, but more extreme outcomes are not expected during this time as active conflict is not ongoing during the land preparation and planting season.

• Emergency (IPC Phase 4) is also expected to be widespread in southern and southeastern pastoral areas, where drought conditions are forecast to persist through at least mid-2023 due to an unprecedented fifth consecutive poor rainfall season in late 2022. Levels of acute malnutrition are already within the ‘Critical’ and ‘Extremely Critical’ levels. Minimal pasture and water availability have resulted in poor to emaciated livestock body conditions, rendering household livestock holdings increasingly unsalable and milk availability very low. According to the government, reported livestock deaths amounted to around 3.4 million as of early June. Conditions will only further deteriorate during the July to September dry season and minimally improve during the below-average October to December rainy season. There is a risk that more extreme outcomes could emerge in mid-to-late 2022 if food assistance delivery is not scaled-up and timely.

• The belg/gu/genna rains from February/March to May 2022 were historically low. Across much of central and eastern Ethiopia, the rains fell for only a few days and totaled less than 50 percent of average. In belg-cropping areas, poor rainfall culminated in a failed belg season, which in turn caused a significantly below-average long-cycle meher harvest. In pastoral areas, pasture and water availability are limited, resulting in minimal milk availability, high livestock deaths, and poor terms of trade. Crisis (IPC Phase 3) outcomes are expected until the next harvest is available in October.

1 This statement is in relation to the 2014-2022 for which FEWS NET has comparable national needs estimates. Prior to 2022, the highest recorded needs in this time period were in 2016 following the El-Nino drought.
Poor economic conditions compound conflict and drought to drive the potential for extreme outcomes

Food insecurity in Ethiopia in 2022 is already severe, with an atypically high population in need of food assistance during the peak of the meher lean season. While assistance needs will be slightly lower after the lean season, they will remain historically high. One round of assistance distribution took place in the first half of 2022 across much of Ethiopia, and while this helped to mitigate food consumption deficits among those who received assistance, it did not provide widespread and significant improvements in household food consumption.

In Tigray, following the humanitarian truce first put in place in April of 2022, humanitarian access has improved and levels of conflict have declined in early 2022 compared to 2021. According to the food security cluster, these developments have permitted the distribution of assistance to 3.97 million people between October 30, 2021, and June 29, 2022, with most of the assistance distributed between April and June. This is still largely below the need but far above what was delivered on average from January to May 2021. In addition, available information on crop production this year suggests that while the harvest will be below average, lower levels of active conflict in Tigray are permitting higher levels of household engagement in agricultural activities in 2022 compared to 2021. Households are likely to share their harvest and smooth consumption of their own produced crops over a long period, as this is expected to be one of the sole food sources for households during the 2022/2023 consumption year. Before the conflict, crop production covered up to 60 percent of a poor household’s food needs (Figure 1). Furthermore, while representative survey data is not available, information on consumption and coping available from key informants suggests that while severe levels of acute food insecurity exist, households will likely have some harvest that will mitigate consumption deficits. As a result, it is no longer expected that outcomes worse than Emergency (IPC Phase 4) would be possible during the October to January period alongside the harvest. However, the potential for extreme outcomes does remain possible during the June to September lean season period. During the lean season, households will rely primarily on markets to purchase food and are likely unable to meet even half of their basic food needs given high prices and very limited income.

While concern for northern Ethiopia will decrease slightly in late 2022, concern for southern and southeastern Ethiopia will only grow. High levels of hunger and acute malnutrition already exist, and a forecast for a fifth poor season in late 2022 signals the impacts of drought will likely persist through at least mid-2023. The drought, which began in 2020, has resulted in a death of salable livestock and milk, which are key food and income sources for pastoralists (Figure 2). Household income from PSNP, remittances, gifts, and other sources are inadequate to compensate for losses from livestock production, resulting in minimal income to purchase food. There is little opportunity for recovery on the horizon as additional livestock losses are anticipated during the hagaya dry season, and the forecast below-average October to December 2022 deyr signals expectations of minimal livestock conceptions. Overall, milk availability and saleable livestock will remain very low. While humanitarian food assistance was distributed to about 2.4 million people in April and May, and the next round of assistance distributions is ongoing, funding constraints have compelled humanitarians to reduce ration sizes from the typical 15 kg of grain to 10 kg in July. It is possible that food assistance is preventing more extreme outcomes; however, the information required to confidently establish the role assistance is playing is insufficient. Overall, high levels of acute malnutrition have been recorded, and an increase in hunger-related mortality is likely throughout the outlook period. There is a risk that more extreme outcomes than Emergency (IPC Phase 4) could materialize.

Figure 1. Percentage of annual kilocalories covered by own crop production among poor and very poor households in a typical year

Figure 2. Percent of annual kilocalories from livestock on average across wealth groups in a typical year

Source: USAID HEA Activity and government of Ethiopia
NATIONAL OVERVIEW

Current Situation

**Rainfall**: Rainfall totals in northern, eastern, and southern Ethiopia in early, February to May, 2022 rank among the worst since the mid-1980s, and the exceptionally poor rains have resulted in extreme drought conditions across these areas. In northern pastoral areas, the March to May diraac/sugum rains were among the worst on the historical record. The February to May belg rains were also historically low and failed across many areas, with very few days of rainfall reported.

In southern and southeastern pastoral areas, where drought conditions have been present since late 2020, drought conditions have only intensified. March to May gu/genna rainfall deficits (Figure 3) were widespread and as high as 70 percent below average with a delayed onset and early cessation of rains. In June, the hagaa dry season is ongoing with anomalously high temperatures.

The June to September kiremt season started on time in most parts of the country with average to above average rainfall (Figure 4). However, the season is delayed in areas along the Rift Valley and southwestern Ethiopia. Rainfall deficits are as high as 45 percent of average in these areas. In areas where early season rainfall deficits are being observed, kiremt rains typically start in July. Although, in these same areas, the start of season is being closely monitored as these areas saw a failure of the belg season.

**Conflict**: Relative calm is occurring across much of the north (Figure 5). The humanitarian ceasefire declared in April between the Tigrayan forces, and Ethiopian National Defense Forces (ENDF) has largely held, though some conflict has occurred between Tigrayan and Amhara forces and Eritrean Defense Forces (EDF) in May and June. In mid-June, the Ethiopian government and Tigrayan leadership signed an agreement with the intent to start negotiations to end the conflict; however, negotiations are yet to begin. Some woredas of Wag Himra Zone of Amhara and Zone 2 of Afar remain under the control of Tigrayan forces. Due to continued tensions, the movement of goods and people in and out of the region is minimal.

In the rest of the country, conflict is more widespread and at higher levels than has been seen in recent years. Most notably, levels of conflict are high in Guji, West Guji, West Shewa, and the East Wellega zones of the southern Oromia Region and South Omo Zone and Derashe and Konso special woredas in the SNNP Region. These conflict events disrupt household engagement in livelihood activities, notably ongoing agricultural season and market activities. Localized and sporadic conflict also occurred in May and June in Gambela and Benishangul-Gumuz regions.

**Displacement**: According to the last official update from IOM, as of February, over 4.5 million people were displaced, predominantly due to conflict and drought. It is likely that displacement has increased since February due to the persistent impact of conflict, continued localized conflict in new areas, and reports of increasing drought-related displacement.

In Tigray and most of northern Ethiopia, conflict-related displacement was generally low in May and June; however, irregular population movement and displacement continue as many households search for food and non-food resources. According to IOM assessments conducted in 2021, nearly 2.5 million people were displaced across northern Ethiopia; however, displacement levels have likely shifted since then. In the first half of 2022, according to the regional DRM, over 88,000 people have been displaced in Wag Himra and North Wello zones of Amhara, with over 24,000 IDPs who were displaced from the...
Tigray region relocating to the Jara IDP site in Habru woreda. In Afar, over 335,500 people were displaced between January and April.

In southern and southeastern pastoral areas, drought-related displacement is ongoing at high levels. According to IOM, nearly 800,000 people were displaced in Oromia as of February; of those, 88,000 reported being displaced due to drought. It is likely that drought-related displacement has increased notably since February in the pastoral areas of Oromia. Meanwhile, the Somali regional government indicates that around 300,000 people were displaced between January and early June. Displaced populations in these areas typically reside in camps near larger towns or within larger towns where they can access some labor and humanitarian assistance.

**Crop production**: The extremely poor belg rains and high levels of conflict nationally have led to a failure of the crop production season in many areas – which notably includes Oromia and Amhara – and minimal planting of long-cycle meher crops, mainly high-yielding maize and sorghum. According to the EDRMC, as of May 31, area planted for long-cycle meher crops trended as low as about 50 percent of average in Amhara, and the area planted in other regions was only somewhat higher. In addition, poor rainfall and various pests resulted in the extensive wilting or drying of planted crops. The season completely failed in agropastoral gu/genno-receiving areas, with minimal crop production reported. At this time of year, belg crops are typically being harvested; currently, however, crops are still in the vegetative stage, and the harvest is delayed by one-to-two months.

Many farmers in belg producing areas shifted to short-cycle meher crops, like teff, wheat, and barley, for the kiremt season. Land preparation and planting activities are ongoing, although at below-average levels. Access to seeds is low nationwide due to high agricultural input prices, exacerbated by the high demand for short-cycle seeds. Some farmers that are facing difficulty accessing improved seed varieties are using local seeds instead; however, these have lower yields than those on the market. Access to seeds is lowest in Tigray, where households are resorting to using whatever few seeds are available. In addition, households in Tigray are tilling soils by hand due to limited oxen holdings. The planting window for the kiremt will continue through the end of July.

In SNNP and Sidama regions, perennial crops such as coffee and khat and root crops like sweet potato, cassava, taro, and enset were also negatively affected by poor belg rainfall. However, the start of kiremt rains in early June is helping these crops start to recover. Nevertheless, cropping conditions for both cash and food crops are being closely monitored due to the early season rainfall deficits.

**Fertilizer availability**: According to the Ministry of Agriculture (MoA), over 15 million quintals of fertilizer were ready for distribution as of early June for the kiremt season, which is estimated to be about 83 percent of the need. As international fertilizer prices are high due to the indirect impacts of the Ukraine crisis, retail fertilizer prices have doubled to 1,400 USD/MT since the start of the Ukraine crisis, according to the MoA. Although the government has allocated about 15 billion ETB to subsidize the cost of fertilizer, fertilizer prices are still too costly for most many farmers with low household income. As a result, fertilizer usage is declining, which is likely to have some implications
on crop yields.

**Pasture and water availability:** Pasture and water are minimally available across most pastoral areas, with lower-than-average pasture availability across much of the country (Figure 6). In southern and southeastern pastoral areas, pasture at the end of the gu/genna season is sparse, with many areas having little to no pasture available. Furthermore, atypical livestock migration to areas where there is some pasture available is resulting in high pressure on the already limited pasture. In northern pastoral areas, pasture is sparse, and water is minimally available.

Meanwhile, pasture resources are available for livestock in western, central, and northern cropping areas of Ethiopia. However, despite the start of kiremt season in many of these areas, conditions remain lower than normal, notably in northern Ethiopia.

Across all pastoral areas, water sources did not recharge with early 2022 rainfall, and water availability is extremely difficult. In drought-affected areas of the Oromia region, water trucking provided by the government and humanitarians is ongoing, with 83 trucks distributing water daily; however, this water is insufficient to meet the need for human or livestock consumption. Similarly, in Afar, more than 24 water trucks were deployed in early June to main IDP sites and woredas with water shortages benefitting more than 100,000 people.

**Livestock migration:** While livestock migration is normal in northern pastoral areas, most southern and southeastern pastoral areas are witnessing large-scale, atypical livestock migration. In the Somali Region, migration remains within the region, with reports of all livestock species migrating, including milking animals, which is atypical. Generally, the main migration route is from Dollo Zone to Fafan Zone and to areas where some gu/genna rainfall fell. According to the Somali regional government, as of mid-May, over 1,200 pastoral households migrated with their herds to Harshin of Fafan Zone from Dollo Zone. Additionally, livestock from Somalia (particularly from Gedo Region and Somaliland) have migrated to Ethiopia in search of pasture. The atypical migration is putting further pressure on already limited pasture resources.

In Oromia, large numbers of livestock are migrating far from their normal routes to predominately higher and middle elevated areas, with relatively better pasture availability. Recently, the number of herd migrations slightly declined following rainfall in the first week of June. Households in the lowland areas of Guji zone are unable to migrate their livestock due to conflict.

**Livestock condition and productivity:** In northern pastoral areas, livestock body conditions are poor, particularly for cattle, with goats and camels in relatively better condition. The number of milking animals, conceptions, and births during the March to May sugum rains significantly declined due to below-average pasture and water availability. Currently, livestock births are ongoing at very low levels. These conditions allow for little to no milk availability, not only due to the poor season but also the low level of household livestock holdings due to prior droughts as well as the slaughter and looting of livestock during conflicts. In southern and southeastern pastoral areas, livestock body conditions are extremely poor, with many livestock unable to move, and large-scale livestock deaths being reported (Figure 7). Regional governments report that around 3.4 million livestock died in Oromia and Somali region between late 2021 and early June due to the ongoing drought conditions. In Borena Zone, the regional government reported that herd sizes had declined by around 22 percent as of early June due to low births, high sales, and a large number of deaths. Additionally, based on an assessment in mid-June in Dawa zone of the Somali Region, around 55,078 households have lost their livestock assets. Furthermore, livestock conceptions have been low across the southern and southeastern areas due to consecutive droughts, resulting in low to minimal milk availability. Milk production is particularly low among cattle. There are reports of limited to

**Figure 6. Vegetation conditions as a percent of median, June 26 to July 5, 2022**

**Figure 7. Cattle body conditions in Dollobay Woreda of Somali Region, May 28, 2022**
no local milk available on the market besides milk from industrial or better-off households, an indication of the low levels of conceptions, births, and milk availability in areas of the region.

**Macroeconomy:** Macroeconomic conditions remain poor due to continued limited foreign reserves and declines in budgetary support that, in turn, result in high inflation and continued depreciation of the ETB (Figure 8). According to the Central Statistical Agency (CSA), the annual inflation rate was 37.2 percent in May, the highest in the last decade. Food inflation continues to be the primary driver of the high inflation rate, with annual food inflation sitting at 44.2 percent in May. Non-food inflation is about 28 percent. The high food inflation is driven by high transportation costs, below-average national production, and a low volume of food imports, such as wheat and cooking oil.

According to the National Bank of Ethiopia, the ETB was trading at 51.79 ETB/USD in June, which is about 19.3 percent higher than last year. In 2021, the value of the ETB on the official market depreciated on average of two percent per month, but the rate of depreciation declined to less than one percent per month between March and June 2022. This is mostly due to government controls over the devaluation of the currency. According to anecdotal information, the parallel market exchange rate in May was valued at over 80 ETB/USD, around 55 percent higher than the official exchange rate. The difference in the value between the official and parallel market rate is historically high and reflective of the limited availability of hard currency circulating in the country and in banks.

High fuel prices are increasing transportation costs, with knock-on effects on food prices. Although the government of Ethiopia subsidizes fuel prices, the government’s ability to intervene in the market has declined due to high global fuel prices and low government revenue. Between 2021 and 2022, the government had to raise fuel prices at the pump four times. Prices of fuel have increased in recent months, significantly increasing in some markets due to conflict (Figure 9). In Tigray, fuel availability is further limited, which hinders humanitarian and economic activities. Fuel through humanitarian convoys continues to arrive; however, the level is far below demand.

**Flow and supply of commodities:** The market food supply is below average across the country, resulting from the combination of poor domestic production and the impact of conflict on trade flows. In particular, the movement of goods from western surplus-producing areas to central and eastern deficit-producing markets is low. Conflict in central and western Oromia is also limiting the movement of goods. Most markets in the country are functioning at normal levels, except in northern Ethiopia. In much of Tigray and adjacent areas of Amhara and Afar, market activity remains significantly disrupted (Figure 9). The movement of hard currency and goods is of limited volume and occurs mainly through illegal traders into Tigray through Afar and Amhara. In Tigray, market function is impacted by an extreme shortage of supplies and fuel shortages.
**Staple food prices:** Staple food prices in most markets across the country are significantly higher than normal, steadily increasing since at least January 2021 (Figure 11). Generally, this is driven by below-average 2021/2022 production, conflict-related supply disruptions, rising fuel and transportation costs, and lower imports. Wheat prices, specifically, increased following the onset of the Ukraine crisis, which drove up global wheat prices and led to a decline in wheat imports.

In Addis Ababa, maize prices as of June were over 60 percent higher than June 2021 and 145 percent higher than the five-year average. This trend is also observed across many rural markets in Ethiopia. For example, maize prices in Jimma and Dire Dawa markets are over 125 percent higher than the five-year average. In Chereti, a key market in the Somali Region, maize prices are nearly 200 percent higher than the five-year average and 125 percent higher than last year (Figure 12).

In conflict-affected areas, prices are generally higher than in non-conflict affected areas. According to WFP’s June price data, staple food prices in Tigray were nearly 300 percent higher than prices in Dessie market in Amhara Region. Although, staple food prices in Adigrat, Adwa, Shire, and Wukro Tigray, range from about 30 percent to 295 percent higher than Dessie market in Amhara region.

**Livestock supply and prices:** In areas not affected by conflict and drought, livestock market supply remains normal, with prices well above average, largely reflecting rising costs linked to poor macroeconomic conditions. Outside of conflict-affected areas of Afar, livestock prices are higher than at the same time last year. In Logia, according to the regional government, goat prices are 116 percent higher in June 2022 than in June 2021. Despite the high livestock prices, terms-of-trade (ToT) have declined by around 20 percent since June 2021 as food prices are significantly above average.

In conflict-affected areas of Amhara and Afar, according to WFP, livestock market supply is normal, with high livestock market supply in Tigray. Market supply is high in Tigray as households try to sell their livestock for income, though with limited cash and income in the region, demand is low. According to WFP, the prices of goats and sheep in Tigray in June were generally 50 to 70 percent below that Dessie market in Amhara. Similarly, in areas affected by conflict in Afar, overall prices are higher than in Tigray but are still 25 to 50 percent below average.

Conversely, in southern and southeastern pastoral areas, the low salability of livestock due to poor body conditions is resulting in low livestock market supply, despite the prevailing need among households to earn income. In relative terms, the market supply and salability of camels, goats, and sheep are better than the cattle. Additionally, milk on the market is low to limited, indicating that households have little to no income from milk sales.

Although livestock prices remain high overall, the increase in livestock prices are not keeping pace with the increase in staple food prices. As a result, the ToT have declined. Across southern and southeastern pastoral areas, livestock ToT are 30 percent or more lower than the five-year average. In Chereti market, livestock ToT are over 50 percent lower than in 2021 and around 40 percent lower than average (Figure 13).
**Income from labor and self-employment**: In central and western areas of the country, labor demand and opportunities for labor are generally normal. In contrast, labor demand is low in conflict- and drought-affected areas. Agricultural labor demand associated with the *kiremt* season is at an annual peak, although households are accessing these opportunities at lower-than-normal levels due to limitations restricting on population movement in many *meher* cropping areas. On the other hand, labor demand and wages associated with coffee production in the south and southwest are generally normal.

Migratory laborers from central and eastern Tigray and eastern Amhara are still unable to move in search of labor due to insecurity. At this time of year, migratory labor is a key source of income, which is largely unavailable. Additionally, in Tigray, due to the lack of economic activity and high labor supply, labor opportunities are largely unavailable. According to WFP, unskilled labor wages in Tigray in June were up to 70 percent below that of Dessie, Amhara.

Similarly, conflict in Guji, Shewa and western zones of Oromia is also limiting migratory labor movement, with households losing this important income source.

Overall, income from self-employment, including petty trading and firewood and charcoal sales, also remains lower than normal across the country due to poor macroeconomic conditions and high competition. This is resulting in lower-than-normal income from this source.

**Remittances**: Based on anecdotal reports, international and domestic remittances and gifts are overall lower than normal across the country. International remittances have declined, notably from the Middle East, due to population returns and high global food prices. Remittances from within the country are also declining as the cost of living has increased, forcing those in urban areas to spend a larger share of their income on their household and sending less to relatives in rural areas.

**PSNP**: PSNP distributions continue in June to beneficiaries. The transfer modality is in cash in pastoral areas and both cash and grain in crop-dependent areas. In areas that receive PSNP as cash, the ration has increased due to the high prices of food; however, it is not sufficient for households to purchase the 15 kilograms of grain monthly that PSNP is intended to purchase.

**Humanitarian Assistance**: Round 5 humanitarian assistance distribution of 2021 started in December 2021 and was completed in late June, atypically late. Round 1 of 2022 was launched in April with dispatch and some distribution largely beginning in June. The exception is Tigray, where round 3 of the 2021 distribution is still ongoing. Round 1 of 2022 is prioritizing conflict- and drought-affected areas. Each round of distribution is meant for six weeks, where distribution is inconsistent in most areas.

In Tigray, humanitarian access has relatively improved, but access remains challenging. As of June 29, nearly 4.0 million people were reached with assistance since October 30, 2021, translating to about 500,000 people reached a month. Between April 1 and late June, over 3,600 trucks have entered Tigray, with convoys increasing in size and becoming more regular over this time. While there has been a significant scale-up of assistance, this is marginal compared to the current population in need of food assistance, and compared to the 2.9 million people on average per month, humanitarians were reached during the January to May period in 2021. In Amhara and Afar, humanitarians distributed assistance in round 5 to about 12.6 million people, lower than the plan due to funding challenges.

In the Somali Region, assistance distribution to nearly 2.3 million for round 1 started in April and was complete in June. The ration size was cut from 15 kg per person per month to 12 kg per person per month. Round 2 distribution, for which dispatch has started, is planned to be further reduced due to funding shortfalls and 10 kg per person per month is likely to be distributed.

**Nutrition**: Acute malnutrition outcomes are poor across much of the country, with SAM admissions in April at the highest since January 2015 (Figure 14). Most of the admissions are concentrated in Oromia and Somali regions. Conflict and drought in northern, southern, and southeastern areas of the country are driving concerningly high and increasing levels of acute malnutrition.
In Tigray, 20 percent of the children screened during the recent Find-and-Treat campaign (completed in February and May) were diagnosed with GAM, giving a proxy GAM level of 20 percent. Proxy GAM rates within Tigray ranged from 10 to 40 percent at the woreda level. Rising admissions and high levels of proxy GAM are also noteworthy, considering that health facilities have been destroyed and humanitarian access remains challenging, leading to lower than typical access to nutrition and health services in the region.

MUAC screening data points to proxy GAM levels within the ‘Critical’ and ‘Extremely Critical’ areas in southern and southeastern pastoral areas. There are some reports of disease outbreaks due to poor access to clean water. The significant decline in food and income access from own sources resulting in further deterioration of nutritional status in these areas.

**Current food security outcomes:** Food assistance needs are at record levels, with up to 15 million people in need of food assistance. Most people in need of assistance are concentrated in southern, southeastern, and northern areas due to conflict and drought, where urgent food assistance is needed as households are expected to have moderate to extreme consumption deficits. Currently, Tigray and parts of northern Ethiopia remain of the highest concern due to the ongoing lean season. In addition, food security is rapidly deteriorating across many drought-stricken southern pastoral areas.

In Tigray, anecdotal reports indicate that extreme levels of coping are ongoing for households to access food, including begging, prostitution, and migrating their whole household to areas where they can access food assistance. Some households are reportedly fleeing to Eritrea and Amhara to access food. In the absence of labor migration and agricultural labor at this time of year, households are likely facing extreme difficulty accessing food. As a result, households face large consumption gaps, which is supported by high levels of acute malnutrition. Across much of Tigray, Emergency (IPC Phase 4) outcomes are likely widespread, and worst-affected households are likely in Catastrophe (IPC Phase 5). Given that proxy GAM on the woreda level reaches as high as 40 percent, it is possible that more severe outcomes are ongoing with ‘extremely critical’ levels of malnutrition and excess mortality, though information is insufficient to verify or deny.

In the rest of northern Ethiopia, Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes are likely widespread due to the prolonged impacts of conflict. Many households are currently relying on food from humanitarian assistance, PSNP, and market purchases. However, income for market purchases is low, and food prices are high, driving low purchasing power. Emergency (IPC Phase 4) outcomes are ongoing in areas with low economic activity, and a large proportion of the population is displaced, leaving households with little resources to access food. In the rest of these areas, Crisis (IPC Phase 3) outcomes are going, where households have the ability to access some income for food purchases and have some access to the belg harvest.

In southern and southeastern pastoral areas, most poor households are likely experiencing significant food consumption deficits. PSNP is helping to mitigate some of the consumption deficits for beneficiary households as well as livestock sales and gifts. However, the income from livestock sales is very limited due to low livestock holdings as a result of considerable livestock deaths that further depletes their productive livelihood assets. Households are also likely consuming what wild foods are available. While humanitarian assistance could be preventing more extreme outcomes in some of the worst-affected areas, information on the frequency, size, and sharing of assistance is insufficient to establish this. As a result, Emergency (IPC Phase 4) outcomes are widespread in worst drought-affected areas. In areas less affected by drought where some milk is available, households are able to sell and consume this income source, resulting in Crisis (IPC Phase 3).

The late and below-average belg production in SNNP and parts of Sidama resulted in an extended lean season and inadequate food access for most of the very poor and poor households. Currently, most poor households are engaged in coping strategies such as increased firewood sales and an increase in petty trading to improve their income. Most households in these areas have already exhausted their produce from meher 2021, no production from belg 2022 was obtained, and earned income is insufficient to cover household food needs. As a result, due to low food and income access, these areas are facing food consumption gap and are in Crisis (IPC Phase 3) through September until the harvest begins. Stressed (IPC Phase 2) outcomes are expected in October as the meher harvest begins, despite being below average.

**Assumptions**

The most likely scenario from June 2022 to January 2023 is based on the following national-level assumptions:

- June to September, kiremt rainfall is expected to be above average in western Ethiopia. Similarly, above-average July to September karan/karma rainfall is forecast in northern pastoral areas.
- Forecast models are pointing to a likely fifth consecutive below-average October to December deyr/hageya rainy season in southern and southeastern pastoral areas.
Reportedly, negotiations between the Federal Government of Ethiopia and Tigrayan Forces are ongoing. Both sides are showing their commitment to peace talks. However, it is likely that insecurity and tensions along with the status quo will continue across much of Tigray with isolated conflict events. Sporadic conflict in southern and western Oromia and areas of SNPP are expected to remain high due to limited security resources available to combat multiple crises.

Further displacement is likely in conflict-affected areas in northern Ethiopia as well as areas of Oromia through January 2023. Severe drought conditions from and within southern and southeastern pastoral areas are expected to drive displacement towns and humanitarian aid distribution centers, particularly near towns, particularly during the June to September dry season.

Due to an extremely poor belg rainy season, the production of belg crops is expected to be significantly below average, particularly in SNPP Region, where the harvest will most likely start late in July/August. In eastern Oromia and non-conflict-affected areas of eastern Amhara, belg production is expected to be poor to minimal. In conflict-affected belg producing areas of Amhara and Tigray, the lack of draft oxen and income to purchase seeds is expected to drive very low production levels.

National area planted of short-cycle crops for the kiremt season is likely to be average in June and July due to favorable kiremt rains and considering most households missed the planting window for long-cycle crops associated with belg rains. Overall, in western surplus-producing areas, the 2022 meher harvest starting in October is likely to be average. However, national 2022 meher harvest is expected to be below average.

In most southern and southeastern pastoral areas, pasture and water availability will likely be exhausted by June/July 2022. Availability of these resources is expected to moderately improve from October to December, but remain limited.

During the June to September dry season, atypical livestock migration to highland areas adjacent to southern and southeastern pastoral areas is likely; however, because pasture availability in these areas is limited, livestock body conditions are likely to be extremely poor to emaciated with minimal to nonexistent milk production through January 2023. An extreme decline in herd sizes is expected through January 2023 due to a likely increase in livestock deaths and decreased livestock conceptions and births. Some households are expected to lose their entire herd inventory due to excessive livestock sales and/or death.

Water and pasture availability in most northern pastoral areas is likely to improve to average levels within a month of the onset of the karan/karma rainy season. As a result, livestock body conditions are likely to improve to normal levels, though herd sizes are expected to remain smaller than normal due to conflict in areas neighboring Tigray. As a result, livestock
holdings, productivity, and milk production will remain below average, particularly in most conflict-affected areas of Afar.

- Pasture and water availability is likely to be average in much of central and western Ethiopia, where livestock production and productivity will also remain at average levels, except in conflict-affected areas of Tigray, Amhara, and Afar, where livestock holding is expected to remain below average.

- Poor belg rainfall in southern and eastern coffee-production areas has negatively affected the first and second round flowering of coffee, so coffee production in these areas is likely to decline to below-average production. In western coffee-producing areas, production is expected to be normal; however, overall national coffee production will likely remain below average.

- In western Amhara and Tigray, sesame production is expected to remain low due to continued conflict. Limited sesame availability will likely result in decreased revenue from national exports, despite high global food prices.

- Persisting conflict, lack of hard currency, and low foreign reserves will most likely drive poor macroeconomic conditions for the remainder of 2022. While the Grand Ethiopian Renaissance Dam and some exports are expected to provide some economic relief, a high annual inflation rate ranging between 30 to 40 percent is likely. As a result, the ETB is expected to continue to depreciate on official and parallel markets through at least January 2023, with the government continuing to manage a slow depreciation of the official ETB rate, averaging about two percent a month.

- Fuel prices and transportation costs are expected to see a sharp increase due to the expectation that the government will continue to reduce fuel subsidies. Fuel prices are then expected to remain high due to supply shortages and high global fuel prices.

- It is likely that imports of food and non-food items will decline through January 2023 due to the impacts of the Ukraine conflict on high global food prices and Ethiopia’s lack of hard currency. The government’s ability to intervene in the market through subsidies is expected to be limited.

- Market functioning is likely to be normal in most of Ethiopia. However, in Tigray, adjacent areas of Amhara and Afar, and western and southern Oromia market function is expected to be limited due to the anticipated sporadic conflict events and the blockage.

- Market food supply is expected to further decline through September 2022 across most of the country. While market supply will remain below average, levels are expected to improve following the meher harvest starting in October through January. In conflict-affected areas of Tigray, bordering areas of Amhara and Afar, and localized areas of western and southern Oromia, low trade flows are expected to limit market supply. In drought-affected southern and southeastern pastoral areas, staple food supplies in markets will likely decline through January 2023, with slight improvements anticipated during October with the meher harvest.

- Staple food prices are projected to significantly increase from June to September 2022 and will likely decline from October to January 2023. Still, prices will remain significantly above average due to below-average 2021/2022 production, conflict-related supply disruptions, limited imports because of low foreign reserves, depreciation of the local currency, and high inflation and fuel prices exacerbated by the Ukraine/Russia conflict. In Addis Ababa, a national reference market, maize prices are expected to remain 120 percent above average.

- The supply of livestock on the market is expected to be normal in most of Ethiopia but is expected to remain low in conflict-affected areas and above-average due to the likelihood of excessive livestock sales in southern and southeastern drought-affected areas.

- Due to inflationary market pressures, livestock prices are expected to remain high, but the increase in the sale price is unlikely to keep pace with rising staple food prices in much of Ethiopia. Meanwhile, in southern and southeastern drought-affected areas, prices are expected to be much lower. Overall, this will drive a decline in the livestock-to-cereals ToT.

- Overall, income from local and migratory agricultural labor will likely remain low. Demand for local and migratory labor is expected to increase from July 2022 onwards due to the anticipated average 2022 meher harvest. As a result, income from agricultural labor is likely to be average, particularly in southern, southwestern, and western parts of Ethiopia, where demand for agricultural labor will likely increase to normal levels, except in Wellega Zone of Oromia Region, where conflict is likely to keep demand low. In other conflict-affected areas in Tigray and Amhara, households are unlikely to generate income from migratory labor. In southern and southeastern pastoral areas, labor demand for livestock herding is expected to be minimal.
• In non-conflict and drought-affected areas, household income from self-employment (including petty trading, sale of firewood and charcoal, and construction labor) is likely to remain average through January 2023. Meanwhile, in conflict-affected areas of northern Ethiopia, localized areas of Western and southern Oromia, and drought-affected southern and southeastern pastoral areas, household income from these sources is expected to remain below average.

• Remittances from the Ethiopian diaspora living in the Middle East and neighboring countries are expected to be below average due to the high number of returnees. Similarly, the quantity of remittances from Europe and Western countries is expected to decline in the value of the ETB. Internal remittances from urban to rural areas are likely to remain below normal due to the atypically high cost of living in urban areas.

• PSNP distributions to public work beneficiaries are expected to continue during July and August 2022 and to all other beneficiaries through the end of the year in most parts of the country. However, in conflict-affected areas of Tigray and neighboring areas of Amhara and Afar, the PSNP distributions are unlikely to occur due to increased insecurity.

• Humanitarian assistance delivery is planned for over 20 million people, with 3 to 4 rounds occurring during the projection period; however, it is expected that due to low levels of funding, the full population is not likely to be reached. Based on historical trends, delivery of assistance is likely to be irregular and delayed; however, humanitarians are expected to prioritize deliveries to drought and conflict-affected areas. Humanitarian operators are likely to distribute up to three rounds of assistance during the projection period; however, a pipeline break is possible due to low funding levels. Access and operation challenges are likely to persist in conflict-affected areas of Tigray and adjacent areas of Afar and Amhara.

**Most Likely Food Security Outcomes**

For the rest of 2022 and into early 2023, Ethiopia will continue to experience one of the world’s worst humanitarian emergencies due to the combination of prolonged impacts of conflict in the north, the anticipated fifth consecutive below-average rainy season in the south and southeast, and continued poor economic conditions. The steep declines in available food and income sources and severity of current proxy GAM data strongly suggest that millions of households will struggle to cope with these shocks, resulting in persistently high levels of acute food insecurity, elevated acute malnutrition levels, and elevated mortality levels. The number of people in need of food assistance, which is at record-high levels based on FEWS NET’s analysis, will most likely peak from June to September, which overlaps the peak of the lean season in cropping areas of northern, central, and southern Ethiopia and the pastoral lean season in southern/southeastern Ethiopia. Although the size of the acutely food insecure population is likely to decline across much of Ethiopia with the start of the meher harvest in October, sub-national food assistance needs will still remain historically high within conflict-affected areas in northern Ethiopia and drought-affected pastoral areas in southern/southeastern Ethiopia between October and January.

Southern and southeastern pastoral areas are of high and increasing concern, with Emergency (IPC Phase 4) outcomes likely to become increasingly widespread with an increasing number of people facing Catastrophe (IPC Phase 5). During the June to September dry season, livestock deaths are likely to accelerate, water availability for people and livestock will decline further, and household access to income and food from livestock production will be very low. During this period, the PSNP – which runs from June to August – is expected to play a key role in helping drought-affected households access food. Prospects for livestock recovery are slim during the October to January period, when the deyr rains typically support livestock births and milk production. Instead, the five-season drought is expected to suppress or prevent recovery in livestock holdings due to low births and high oftake (sales, slaughter, or death). While the occurrence of below-average rainfall may partially replenish water and pasture in localized areas, most households are likely to primarily rely on income earned from self-employment activities to purchase food, including migrating to urban areas to work for income or seek other assistance; however, given poor economic conditions and high food prices, income and food access from these sources is expected to be very low. Humanitarian aid is expected to mitigate food consumption deficits among registered beneficiary households throughout the entire scenario period; however, information on ration size, sharing, and targeting is insufficient to confidently establish if assistance will be the main factor preventing more extreme outcomes. FEWS NET will continue to monitor the delivery of food aid and regularly re-assess the likely impact on outcomes based on field assessments, data collection, and other monitoring information. Regardless, there is a very high level of concern for the risk of deterioration in food security conditions beyond Emergency (IPC Phase 4) levels if food aid is not consistently delivered or if quantities remain inadequate.

Food insecurity is also expected to remain exceptionally severe in Tigray and some of the bordering areas. Emergency (IPC Phase 4) outcomes are expected, at a minimum, given the large-scale loss of food and income that is driving large food consumption gaps and emergency coping strategies, including begging and illegal means of earning income. Moreover, outcomes beyond Emergency (IPC Phase 4) will remain possible throughout the peak of the June to September lean season. However, marginal improvement in acute food insecurity conditions is expected from October to January, facilitated by lower...
levels of conflict, the availability of some stocks from the *meher* harvest, and increased humanitarian access. Limited access to oxen and seeds to plow and plant will most likely result in a below-average harvest, but prospects are nonetheless better than 2021, given the decrease in the presence of combatants and decline in conflict-related disruptions to planting. Additionally, many households will likely also access some food aid distributions, though these are anticipated to remain irregular and insufficient amid prevailing fuel shortages, high fuel prices, access constraints, and insufficient humanitarian funds. While more substantial improvement in acute food insecurity is not likely, these factors are expected to mitigate the size of household kilocalorie deficits, thereby averting widespread, worse outcomes. As a result, Emergency (IPC Phase 4) with some households in Catastrophe (IPC Phase 5) is anticipated from October onward. Still, the lack of a resolution to the conflict suggests a return to more extreme outcomes will remain a risk, particularly if conflict re-escalates within Tigray.

Several additional areas in northern, central, and eastern Ethiopia will remain of concern. Insecure areas of Amhara bordering Tigray will most likely continue to face Emergency (IPC Phase 4) throughout the scenario period, given the scale of disruption to many household livelihood activities and market access, resulting in large food consumption gaps. However, other areas in Amhara – including parts of North and South Wello zones, North Shewa, and North and South Gondar zones – that are relatively less exposed to insecurity will likely be in Crisis (IPC Phase 3) during the lean season. The *meher* harvest in October is then expected to lead to relative improvement in household food availability and access between October and January, with most areas experiencing Crisis (IPC Phase 3) or Stressed (IPC Phase 2) outcomes.

In Afar, where levels of conflict have declined but continue to affect local livelihoods, pastoral households are likely to continue to face significant difficulty accessing food and income, particularly given the long-time horizon for the recovery of pastoral livelihood systems. Displaced households are of highest concern, given that their financial capacity to purchase livestock is low and livestock births will remain low. Low levels of food and income from livestock production, minimally supplemented by income from labor, self-employment, and remittances, are expected to result in Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes. Some assistance will likely mitigate food consumption deficits; however, it is not expected to be at a scale that will result in widespread improvement in outcomes. In the southern parts of Afar, however, the anticipated average *karma* seasonal rains are expected to drive enough relative improvement in food, and income from livestock production is expected, and households have some heads of livestock as these areas were not affected by conflict. As a result, Stressed (IPC Phase 2) outcomes are likely.

In SNNP, Sidama, and central and eastern Oromia, food insecurity will mainly be driven by *belg* production prospects. Given that *belg* harvests are late and below-average, many households face a prolonged season in which they mainly purchase food from the market using income from agricultural labor and self-employment activities. Crisis (IPC Phase3) outcomes are likely until at least October when the *meher* harvest begins. At that time, the availability of household food stocks from own production is expected to drive improvement to Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes. However, FEWS NET is closely monitoring the performance of the *kiremt* rains and *meher* crops in these areas, due to the poor start of season.

*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>Northern Ethiopia</td>
<td>Conflict resumes at high levels in northern Ethiopia, specifically Tigray</td>
<td>If conflict resumes to levels seen in 2021, there would likely be a further decline in engagement in livelihood activities with minimal formal and informal trade activities. If the conflict were to resume during the harvest, there would likely be significant losses to the crops. Additionally, conflict would further restrict humanitarian access. It is likely that conflict would not just be concentrated to Tigray and potentially spread to neighboring areas of Amhara and Afar. In Tigray, widespread Emergency (IPC Phase 4) with more severe outcomes would be possible. In neighboring areas of Wag Himra, Amhara, and areas of Afar, Emergency (IPC Phase 4) outcomes would be likely; furthermore, more severe outcomes would be possible depending on the level of conflict and how it blocks access to key food and income sources.</td>
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**Areas of Concern**

**Tigray**

**Current situation**

**Conflict:** As of June, conflict in 2022 has been relatively low since the conflict started in late 2020 (Figure 16). Furthermore, the Ethiopian government and Tigrayan regional forces have agreed to a humanitarian ceasefire to negotiate standing peace. Despite the relative calm in Tigray, access challenges remain for traders and humanitarians.

**Displacement:** Lower levels of conflict would typically drive lower levels of displacement. However, given the very low availability of typical food and income sources within Tigray, key informants indicate that displacement and migration within and outside Tigray are still ongoing, driven largely by household movement in search of food assistance to areas where it is being distributed. Households that move within Tigray typically return to their homestead once assistance is accessed. In contrast, households that flee Tigray to Eritrea or Amhara Region are not likely to return to Tigray. Estimates are unavailable on how many people are fleeing Tigray as this is not being tracked.

**Crop production:** The June to September kiremt rains generally started on time, and some households are likely engaged in planting. While households are expected to do anything they can to engage in the 2022 agricultural season, their overall capacity to plant is likely low. There are reports that households started tilling activities as early as February in an attempt to cover more land in time for the start of the rains. However, many households lack oxen, which are important for plowing activities, and the lack of oxen has resulted in declines in the area plowed. Additionally, households likely have low access to seeds and fertilizer as these are minimally available on the market.

**Flow, supply of commodities, and prices:** Local markets are currently only able to source staple foods solely from within Tigray, resulting in a low staple food supply and high food prices. The most recent data from WFP indicates staple food prices in Tigray are well above that in the neighboring Dessie market in Amhara. Conversely, the market supply of livestock is very high relative to demand as households are desperately selling livestock to earn income. However, demand for livestock is low, limiting the level of income households can earn. Overall, livestock prices are lower than in the relative Dessie market, likely due to low effective demand and low availability of currency.

**Income from labor and self-employment:** At this time of year, households in Tigray typically rely heavily on migrating to West Tigray and areas outside of Tigray for labor opportunities for income as well. As ethnic tensions continue, the ability of people...
to move and access labor opportunities remains minimal. Anecdotal information points to some informal economic activity in the border areas of Tigray with Amhara and Afar regions, with goods moving by human labor or pack-animal. Most goods, predominantly consisting of cash, food, spices, and some fuel, that move into Tigray remain near the border.

**Humanitarian Assistance:** The distribution of humanitarian assistance for Round 3 is ongoing across much of the region. Since the start of Round 3 distribution in mid-October, humanitarians have reached 3.5 million people over the eight-month period as of June 2022. Nearly 1.5 million people of this total received the assistance since April when humanitarian access to Tigray began to improve. While this level of assistance is a welcome increase compared to the standstill observed in the preceding months, aid is still substantially lower than the scale of humanitarian needs. Furthermore, humanitarian access challenges persist due to the lack of fuel, and some areas likely remain occupied by Eritrean forces.

**Nutrition:** The rate of SAM admissions to TFP programs and levels of acute malnutrition continue to increase. Between January and May, 47,839 children under five were screened in nine woredas of the region through the Find-and-Treat campaign. Out of the screened children, 20 percent were diagnosed with GAM, giving a proxy-GAM of 20 percent. Across screened woredas, the proxy GAM rates ranged from 10 to 40 percent. Rising admissions and high levels of proxy-GAM are also noteworthy, considering that health facilities have been destroyed and humanitarian access remains challenging, leading to lower than typical access to nutrition and health services in the region.

**Current food security outcomes:** In Tigray, anecdotal reports indicate that extreme levels of coping are ongoing for households to access food, including begging, illegal means, and migrating to areas to access assistance. Additionally, households are reportedly fleeing to Eritrea and Amhara to access food. In the absence of labor migration and agricultural labor at this time of year, households are likely facing extreme difficulty accessing food. As a result, households face large consumption gaps, which is supported by high levels of acute malnutrition. Across much of Tigray, Emergency (IPC Phase 4) outcomes are widespread with worst-affected households in Catastrophe (IPC Phase 5). It is possible that more severe outcomes are ongoing with ‘extremely critical’ levels of malnutrition and excess mortality, though information is insufficient to verify or deny.

**Assumptions**

In addition to the national assumptions, the most likely scenario for Tigray is based on the following assumptions:

- Agricultural activities are expected to be low during the projection period; however, levels are likely to be somewhat higher than in 2021.
- Domestic remittances from urban to rural areas, an important income source for many poor households, are likely to be limited due to the poor functioning of banks and limited income-earning options in urban areas.
- Income from livestock sales is expected to be limited due to low effective demand and high market supply;
- Humanitarian food distributions are most likely to continue at current levels at a minimum. Given the significant push from humanitarian actors and the international community, some scale-up in assistance is expected; however, a scale-up significant enough to sufficiently cover the enormous needs in Tigray is deemed unlikely in the immediate term.

**Most likely food security outcomes**

During the peak of the lean season, from June to September, millions of households are expected to face large food consumption gaps since the local economy is no longer functioning and household sources of food and income are minimal.
Acute malnutrition is expected to increase further, related to expected constraints on food access during the lean season as well as from the lack of availability of or access to nutrition and health services. Millions of households are expected to face Emergency (IPC Phase 4) outcomes, with the possibility that more severe outcomes are possibly ongoing in some areas.

Acute food security is expected to marginally improve in October with the meher harvest; however, this will only mitigate food consumption gaps for some households. Households are likely to share their harvest and spread their own produced crops over a long period as this is expected to be one of the sole food sources for households during the 2022/2023 consumption year. Additionally, many households who remain displaced are located in urban areas or have had their land destroyed; these households have minimal available assets and likely did not engage in the season, and they are expected to continue to face extreme difficulty accessing food. During the post-harvest period, Crisis (IPC Phase 3) outcomes are likely in areas where household market access is relatively better, and the last impacts of conflict are not as extensive, such as in West Tigray. However, it is expected that many other areas will continue to face Emergency (IPC Phase 4) outcomes during the projection period. Due to the availability of the harvest, FEWS NET assesses that it is not likely that more severe outcomes would occur in the October to January period due to the availability of the harvest.

**Afäder Pastoral (AFP) Livelihood Zone**

**Current Situation**

**Rainfall:** Gu, April to June, rainfall was delayed by about two to four weeks and ended over a month earlier than normal. The southern part of the Äfäder zone, particularly Dolow-bay, Hargele, Bare, and Godgod woredas and Adadle woreda of Shabelle Zone received little to no rainfall. Rainfall for the April to June season was well below average.

**Displacement:** While there have been IDPs displaced before the current drought, the surge in the current drought-induced displacement over the past few months is among those who have lost their productive assets. Between January and May, an estimated 25,600 people are displaced within the livelihood zone.

**Pasture, and water availability:** Pasture and water resources are minimally available. Livestock are consuming what minimally available pasture is available or migrating to other areas.

**Livestock migrations:** Livestock migrations started earlier than average across all species, including milking animals. Livestock migration took place in four directions from eastern Dolow-bay to Somalia (Qoneey of Luk in the Gedo region and to the Bay region of Somalia), from southern Hargele and western Barey to far Eastern Hargele and part of Shabelle, from Northern and Northeastern Hargele to Shakisa of Oromia, and from Adadle woredas to areas where the Shabelle river flooded in earlier times.

**Livestock condition and productivity:** The current livestock condition is very poor and emaciated, especially for cattle and camels. The consecutive droughts have led to large-scale livestock deaths, with the regional government reporting around 28,500 livestock deaths in the Äfäder zone between December 2021 to March 2022.

Low kidding/calving and low milk productivity occurred in the past season. Most livestock, mainly cattle, have not conceived in at least the past two seasons, resulting in minimal milk production. Milk was reportedly only available in large towns from industrial farms or better-off households.

**Livestock and Staple Food Prices:** According to DPPCO data, June maize prices in Gode market were over 120 percent higher than June 2021 and nearly 200 percent higher than the five-year average. The price of most essential imported commodities is high, with prices increasing since the Ukraine crisis. The price spikes observed in local cereals and imported staple foods are associated mainly with the consecutive below-average local crop harvest and supply chain constraints.

At the same time, goat prices are only about 40 percent higher than in June 2021 and around 130 percent above the five-year average. Overall, while inflationary pressure leads to high livestock prices, the high livestock market supply and poor conditions result in a lower increase in livestock prices than food prices.
In May 2022, the ToT between local quality goat and white maize in Chereti was over 35 percent lower than in 2021 and the five-year average. Key informant interviews and focus group discussions found that households reported low livestock and milk sales income.

**PSNP:** PSNP distributions are ongoing to about 212,000 people in Afder. PSNP distributions are in cash and were increased due to the increased cost of staples on the market; however, it is not sufficient for households to purchase the full ration PSNP is intended for.

**Humanitarian Assistance:** In the Afder zone, around 120,000 received assistance in April and May with a lower than normal ration due to funding constraints. The ration for round 1 distribution was reduced to 12 kg of cereal, 1.5 kg of pulses, and 0.45 kg of oil. Based on FEWS NET field assessments, there was no visible assistance distribution in late May. In June, dispatch of round 2 assistance was reported to be ongoing.

**Nutrition:** The food security situation is rapidly deteriorating, and high acute malnutrition prevalence is reported in the drought-affected AFP. In April, 20,753 under-five children were screened in Dolobay woreda in Afder and found a proxy GAM rate of 32 percent. Similarly, admission to the therapeutic feed program showed an alarmingly increasing trend in Hargelle, Dolobay, Charrati, and Adadle. The April admission rate in the four woredas is 100 percent higher than in March.

There is an increasing trend of SAM cases in Gode hospital, the main referral center for Shabelle, Afder, and parts of the Liben zone. In May, 132 SAM patients were admitted to the hospital, nearly 200 percent higher than the number admitted in April. The hospital provides the necessary lifesaving support but is overwhelmed by the increasing number of acute malnutrition cases.

**Current food security outcomes:** Due to low income from milk sales and livestock sales, poor households depend on limited credit, loans, gifts, and some humanitarian food assistance. The coping strategies reported include increased reliance on the collection of bush products for sale and consumption, migration to urban areas in labor, and reducing the frequency of meals. Families are also using coping strategies such as splitting up the households, with some migrating with livestock and the rest of the family migrating to urban areas for work and assistance. Emergency (IPC Phase 4) outcomes are likely ongoing with households likely in Catastrophe (IPC Phase 5).

**Assumptions**

The assumptions for this area of concern are covered in the national overview.

**Most Likely Food Security Outcomes**

Household debt levels will likely remain high due to increased food, animal feed, water, and migration purchases on credit during the multi-season drought. The below-average deyr rains will provide marginal relief for livestock health, allowing poor households to sell an additional one to two gift livestock towards the end of the year and consume goat milk. As a result, many households are likely to be in Emergency (IPC Phase 4) between October 2022 and January 2023, with some households likely to be in Catastrophe (IPC Phase 5).

**Northeast Wina Dega Mixed Cereal (NMC) Livelihood Zone**

**Current situation**

**Conflict:** While conflict has been relatively calm in the last few months, the impacts of conflict continue as household assets and livelihoods were decimated. Additionally, some areas such as Abergale and Tsgilbgi woredas in Wag Himra Zone remain under the control of Tigrayan Forces, so economic activity and humanitarian assistance distribution are limited. In areas occupied by Tigrayan Forces, livelihood and market access are significantly disrupted, access to humanitarian services is minimal, and services like health and education are not functioning.

**Displacement:** Many households remain displaced and are living in IDP camps. According to the zonal government, as of late June, the number of displaced is as high as 86,000, with the highest proportion of these hosted within the community. Many people are moving towards Sekota and Tsiska as these areas have some income-earning opportunities. According to the North Wello DRM office, over 22,900 people are in IDP camps in Jara and Habru woreda in North Wello Zone as of mid-June.

**Livestock condition and productivity:** Extended dryness associated with the poor belg mainly affected the availability of water and pasture for livestock. This has resulted in some moderate deterioration of livestock body conditions and an increase in the incidence of some livestock diseases. Overall, livestock herd sizes are low. Moreover, livestock herd sizes are declining due to excessive sales as households sell them to access income.
**Flow and supply of commodities:** Since conflict subsided, market activity has been slowly improving with increases in the food supply. Although, markets are exhibiting a seasonal decline in the food supply due to seasonal reduction in food availability and low economic activity.

**Staple food prices:** As of June, in Sekota, sorghum prices were over 78 percent higher than the same time last year. The June 2022 goat price in Sekota market is about 76 percent higher than the five-year average.

The ToT for goat to sorghum declined from August to December due to active conflict, and market access was poor. Although, the ToT gradually improved due to the livestock prices as livestock prices increased. Although while there was an improvement in ToT, poor households have low livestock holdings, which is limiting their ability to sell livestock to access this income source.

**Income from labor and self-employment:** Migration labor is a key income source; while the wage earned per day is higher than normal, people movement is limited. This is limiting income from this source. Based on focus group discussions and key informant interviews, only one in every four people traveled outside the area for migration labor in 2021. Meher 2022 cultivation is ongoing, and activities are ongoing locally.

**PSNP:** PSNP transfers are ongoing; however, the overall caseload is lower in 2022 than in 2021. Additionally, four months of a transfer is completed at once. While the cash transfer remains the same as in 2021, there is increasing concern among beneficiaries considering the rapid increase in food prices, weakening the purchasing power of the PSNP cash transfer.

**Humanitarian Assistance:** After the conflict ceased, there were two rounds. In Wag Himra Zone, nearly 475,000 people were assisted in rounds 4 and 5 between February and April. Assistance distribution did not take place in May or June. In May and June planning for distribution and targeting activities were ongoing.

**Nutrition:** The find-and-treat campaign and acute malnutrition screenings conducted in April highlight very high levels of acute malnutrition.

**Current food security outcomes:** Many households rely on humanitarian food assistance and market purchases for food consumption. Key informants reported many households continue to employ food-based coping like reducing meal size and frequency. Recent livestock and labor market improvements are allowing households to earn some income for food purchases. Although, access to food overall remains significantly limited, notably in Wag Himra Zone, where Emergency (IPC Phase 4) are likely ongoing. In adjacent areas, where market access is relatively better, and income is available at higher levels, Crisis (IPC Phase 3) outcomes are likely ongoing.

**Assumptions**

The assumptions for this area of concern are covered in the national overview.

**Most likely food security outcomes**

Households will likely continue to face large food consumption deficits as most households are expected to rely on market foods with minimal purchasing power. Households will increasingly rely on food-based coping strategies like cutting meal sizes and eating wild foods until the harvest begins. Thus, households in Wag Himra will be in Emergency (IPC Phase 4), and those in North Wello and South Gonder will be in Crisis (IPC Phase 3) from June to September 2022.

Despite fewer than average households accessing the meher harvest, households will access this food to consume food. Additionally, households are likely to use the harvest to repay debts, and worst-conflict affected areas will likely continue to face difficulty accessing food. As a result, in Wag Himra, Crisis (IPC Phase 3) outcomes are likely to persist. In neighboring areas of the livelihood zone, Stressed (IPC Phase 2) outcomes are likely where food access is expected to be relatively better.
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.

FEWS NET: Ethiopia Food Security Outlook: Food aid remains insufficient amid very high levels of hunger and malnutrition, June 2022.

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.