FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

ETHIOPIA Food Security Outlook Update — April 2022

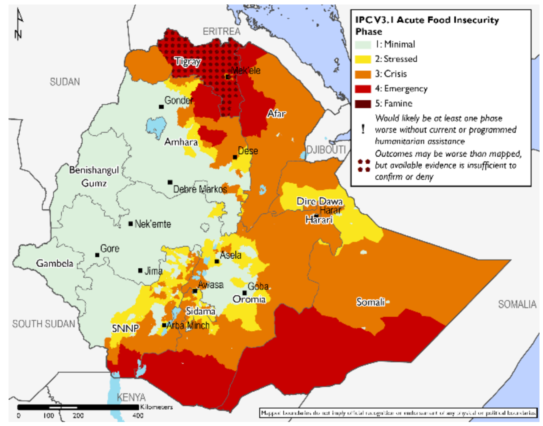
Extreme food insecurity persists in the north while outcomes deteriorate in the south amid historic drought

KEY MESSAGES

- In Tigray, although some improvement in humanitarian access has led to around 3,400 MT of assistance entering Tigray in April, millions of households still face extreme difficulty accessing sufficient food. Available information from key informants suggests some households are engaging in severe coping strategies, such as begging and migrating in search of food, notably to Amhara. At a minimum, Emergency (IPC Phase 4) outcomes exist in Tigray, with households in Catastrophe (IPC Phase 5). It is possible outcomes are worse, but given access constraints, information is insufficient to confirm or deny this. In bordering areas of Amhara and Afar, Emergency (IPC Phase 4) outcomes are expected to persist as households have minimal access to food and income, notably among displaced populations.

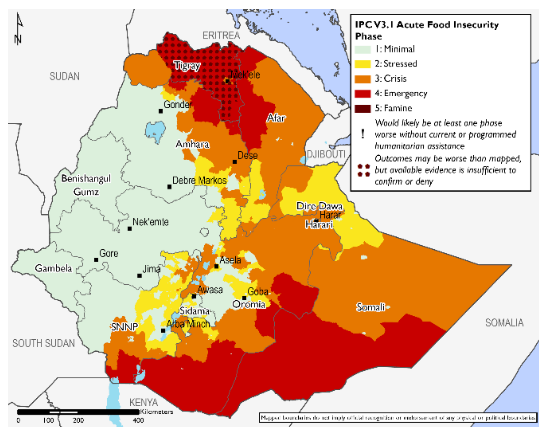
- Very limited rainfall and hot temperatures mark the ongoing March to May *gu/genna* season in southern and southeastern areas. Pasture and water availability are minimal, and regional government reports suggest increasing livestock deaths, low livestock milk production, and decreasing livestock values in markets. According to regional and zonal governments in southern and southeastern pastoral areas, over 2.2 million livestock died between October and mid-April. With limited access to livestock for sale, pastoralists across these areas face extreme constraints in purchasing sufficient food, leading to wide consumption gaps. Emergency (IPC Phase 4) outcomes are widespread, with some populations in Catastrophe (IPC Phase 5). If humanitarian assistance is limited and the *gu/genna* season fails, more extreme outcomes are possible. Forecast models and research conducted by FEWS NET science partners also indicate an increased likelihood of a below-average October to December *deyr/hageya* season, which would constitute an unprecedented fifth consecutive below-average season.

Projected food security outcomes, April to May 2022



Source: *FEWS NET*

Projected food security outcomes, June to September 2022



Source: *FEWS NET*

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.

- February to May *belg* rainfall started over a month late and has been significantly below-average, negatively affecting land preparation and planting activities. According to regional governments, as of April, the area planted is around 60 percent below average across *belg* areas of Sidama, SNNP, and Amhara regions. As a result, 2022 *belg* production is likely to be delayed by at least a month and significantly below average, driving an atypically long lean season in *belg*-dependent areas. Furthermore, the poor *belg* rainfall has reduced land preparation and planting of long maturing *meher* crops.

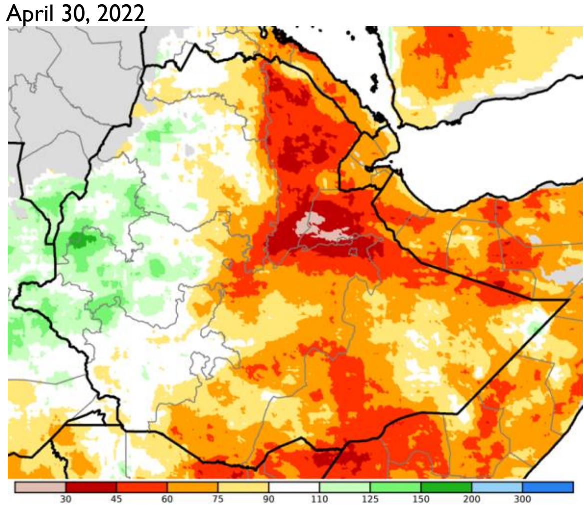
- Food prices, notably for staple food and cooking oil, have significantly increased, associated with poor macroeconomic conditions and the war in Ukraine. According to the Central Statistical Agency (CSA), annual inflation in March was 34.9 percent, 14.3 points percentage higher than in March 2021. While the government is likely to continue subsidizing many imported staple foods and fuel, this is not expected to stabilize prices. While livestock prices are expected to remain near or somewhat above average due to inflationary market pressures, food prices will continue to increase, driving declining terms of trade.

FEWS NET Ethiopia
ethiopia@fews.net
www.fews.net/ethiopia

CURRENT SITUATION

Conflict: The security situation in Tigray remains relatively calm, with few conflict incidents occurring in March. However, clashes between government-aligned forces and the Tigrayan forces occurred along the borders of Amhara and Afar prior to the humanitarian cease fire, in March. Sporadic conflict in Oromia, concentrated in East and West Guji, West Wollega, Bale, and West Shewa zones, remains high, despite having declined slightly since December 2021. In affected areas, conflict continues to disrupt livelihood activities, while also limiting population movement and trade flows, and at times resulting in the destruction of infrastructure.

Figure 1. Rainfall as a percent of normal from March 1 to April 30, 2022



Source: *UCSB/CHC*

Rainfall: Atypically dry conditions prevailed across much of Ethiopia through late April, as rainfall for seasons starting in early 2022 has been minimal in most eastern areas (Figure 1). The February to May *belg* season was about five to six weeks late, with rainfall deficits as high as 70 percent below average. The northern *belg* areas of Amhara and Tigray experienced some of the driest starts to the season. The March to May *gu/genna* rainfall in southern and southeastern pastoral areas started at least two to three weeks late and has been very erratic, marked by large rainfall deficits and continued drought conditions. This is the fourth consecutive below-average season in these regions, unprecedented on the historical rainfall record since 1981.

In northern pastoral areas of Afar, northern Somali Region, and East and West Haraghe of Oromia, the *diraac/sugum* season has been extremely poor, with only a couple of rainfall days, marking one of the driest seasons on the historical record.

Displacement: According to the IOM, based on an assessment conducted between December and February, over 4.5 million people are displaced in the country, with around 81 percent of the displaced population indicating conflict was the reason for their displacement, while around 10 percent identified drought as the key reason.

In northern Ethiopia, despite the relatively low levels of conflict, populations continue to be displaced. Based on key informants and the likely extreme food shortages in Tigray, most of the displacement is reportedly due to hunger. According to the Amhara Region Emergency, Shelter and Nonfood Cluster, as of late March, over 60,000 people fled from areas of Wag Himra bordering Tigray towards Sekota and other towns within Wag Himra Zone, and 58,000 Tigrayans have arrived in North Wello Zone in search of food.

In Afar, between January and mid-April 2022, over 336,500 people were displaced from Zone 2 *woredas*, primarily to Berahle, Koneba, Abala, Erebti, Megale, and Dalol *woredas*.

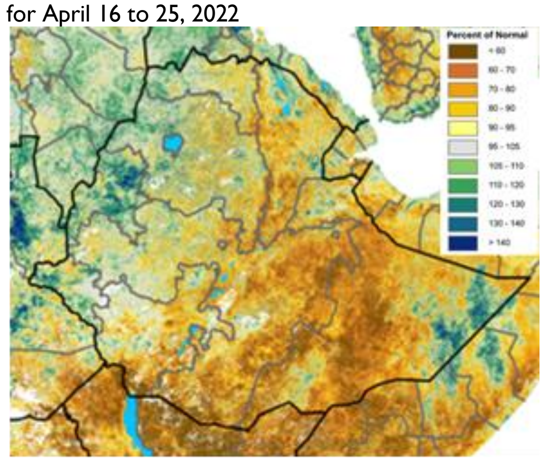
Drought-related displacement is also ongoing. Nearly 200,000 people are reportedly displaced in Somali Region from seven zones to IDP camps or nearby towns. According to the IOM, between April 16 to 22, over 2,000 people were displaced in Borena Zone due to drought.

Crop production: Planting for the ongoing rainy seasons is well below average due to limited rainfall and low access to agricultural inputs resulting from limited supply of seeds and fertilizer and high prices. Fertilizer prices have increased by over 150 percent in 2022 compared to 2021 due to price speculation associated with the Ukraine crisis. Land preparation and planting for *kiremt* crops is just starting. While information on planting remains limited in Tigray, with the early season rainfall deficits and limited access to agricultural inputs, FEWS NET expects planting is significantly lower than normal. In Amhara, as of late March, about 40 percent of the area traditionally sown with *belg* crops was planted, with many of the fields covered with dry planting.

As of early April, in most central and eastern Oromia, SNNPR, and Sidama, land preparation and planting of *belg* crops is below average, with only around 12 percent of the average area planted, according to the Regional DRM offices. Furthermore, conflict-displaced households in Guji and West Guji zones are likely unable to cultivate their lands. Continued drought conditions in agropastoral areas of southern and southeastern Ethiopia have led to little to no crops being planted. In areas where planting has occurred, most crops are currently at the seedling and vegetative stages in good condition. Concern is growing for planting long-cycle *meher* crops that depend on *belg* rainfall in Tigray, Amhara, Oromia, and northern SNNPR.

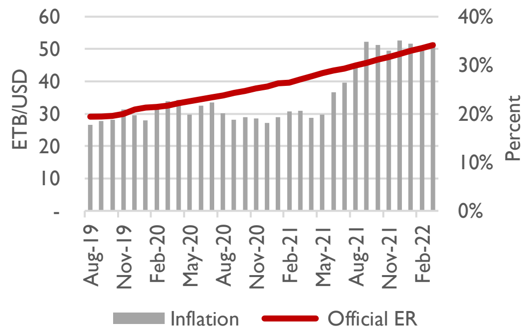
Pasture and water availability: Ongoing drought conditions driven by the fourth consecutive poor rainfall season and hot temperatures in southern and southeastern pastoral areas are resulting in minimal pasture availability (Figure 2). In most parts of Afar, eastern Oromia, and northern Somali regions, pasture and water availability is below average and depleting rapidly in many *woredas* due to one of the driest seasons on record. In central and eastern Oromia, SNNPR, and eastern Amhara, abnormal dryness has already created a shortage of pasture and water. This is notably the case in Wag Himra Zone of Amhara; Western Tigray; central, eastern, and southern Oromia; and most parts of SNNPR and Sidama; and Rift Valley areas, where water and pasture shortages are critical. In most parts of Afar, eastern Oromia, and northern Somali regions, pasture and water availability is below average and depleting rapidly in many *woredas* due to one of the driest seasons on record.

Figure 2. Vegetation conditions as a percent of average for April 16 to 25, 2022



Source: *FEWS NET/USGS*

Figure 3. Inflation and official market exchange rate



Source *CSA; NBE; FEWS NET estimates*

Livestock migration: Livestock are atypically migrating to riverbeds, searching for pasture and water. According to the Oromia DRM office, over 780,000 livestock in East and West Harage atypically migrated to adjacent highlands between January and March due to the intensifying drought conditions. However, in southern and southeastern pastoral areas, migration is reportedly no longer ongoing in many areas as livestock are unable to migrate due to their poor condition, and pasture and water are widely unavailable.

Livestock condition and productivity: Overall, livestock body conditions are poor and declining, resulting in increases in livestock deaths, even during the ongoing rainy season. According to regional governments, over 2.1 million livestock have died across southern and southeastern pastoral areas as of mid-April. Most livestock deaths are reported in Somali Region and among cattle and goats/sheep. According to the regional government of Oromia, in Borena Zone, over 9,900 households have lost their entire herd.

Livestock births, which typically occur between mid-March and late May, are minimal across pastoral areas as livestock body conditions are too poor to allow for successful birthing. In addition to this, the long-distance travel during migration in search of pasture and water caused many female animals to abort. As a result of few livestock giving birth, milk production is low.

Macroeconomy: Macroeconomic conditions remain poor amid high inflation and as the ETB continues to depreciate (Figure 3). According to the Central Statistical Agency, annual inflation remained relatively stable in April relative to March, reaching 34.7 percent. Food inflation increased to its highest level in the last year to 43.4 percent, primarily driven by recent increases in cooking oil, bread, cereal, and meat product prices. According to the USDA, inflation remains high due to constraints on agricultural production and the continued devaluation of the ETB. In April, the ETB is trading nearly 23 percent higher than April 2021 at 51.19 ETB/USD.

Ethiopia is a net importer of food and among the largest wheat importer in sub-Saharan Africa, importing over 30 percent of its domestic requirement, of which about a quarter is food assistance. Ethiopia relies heavily on wheat imports from Ukraine, Russia, and the US. The government of Ethiopia purchases all wheat imports, except that for food aid distribution. Furthermore, the country heavily relies on imports for cooking oil. In an attempt to stabilize the edible oil market, the government announced it would import about 150 million liters in the next three months and dropped taxes and tariffs on imported oil products.

Most of the fertilizer imported by Ethiopia is sourced from Morocco. According to the Ministry of Agriculture, as of April 20, over 2.3 million quintals of fertilizer stock were available, along with another 12.8 million quintals of fertilizers that have been purchased. Of the 12.8 million quintals of purchases fertilizer, 7.8 million are on route to the Djibouti port, and 4.3 million quintals have arrived at central warehouses in Ethiopia. The total fertilizer requirement in a typical year is about 19 million quintals, of which about 80 percent is available in stock or procured. Despite government efforts to procure sufficient fertilizer, high fertilizer prices, and untimely distribution to markets are driving lower household fertilizer use.

Staple food prices: Maize and sorghum grain prices are following seasonal patterns in Ethiopia; however, prices are higher than last year and the five-year average due to the below-average harvest, depreciation of the ETB, and high costs of oil, wheat, and flour imports due to the Ukraine crisis. Staple food prices in SNNPR, Sidama, and most parts of Oromia Region increased slightly in March relative to the preceding month. According to Ethiopian Trade and Business Corporation (ETBC), the price of maize in Jimma market of SNNPR increased by seven percent from February to March, remaining over 180 percent above the five-year average (Figure 4).

In Tigray and adjacent areas of Amhara, staple food supply on markets is limited due to limited access and low effective demand amid high prices and few income-earning opportunities. In Sekota market, March sorghum prices are over 70 percent higher than the same time last year and the five-year average. In the remaining parts of Amhara and Afar, market supply is improving; however, it remains below average.

In drought-affected southern and southeastern pastoral areas, staple food prices are very high and increasing. In Chereti and Gode markets, maize prices in March were over 100 percent higher than the same time last year and nearly 200 percent higher than the five-year average.

Livestock prices: In the southern and southeastern drought-affected areas, livestock prices have declined since July 2021 due to poor body conditions and increasing market supply as many households sell livestock for food and as it becomes unaffordable to keep them alive. While livestock prices are declining, they remain higher than average due to the inflationary market pressures.

Terms of trade (ToT) continue to decline in most markets. In Chereti market of Somali Region, the goat to maize ToT were around 50 percent lower than the same time last year and five-year average in March (Figure 5). One goat could only purchase about 30 kg of maize compared to the typical 80 kg. Similarly, in Yabello market, the goat-to-maize ToT in March were around 60 percent lower than in March 2021 and the five-year average.

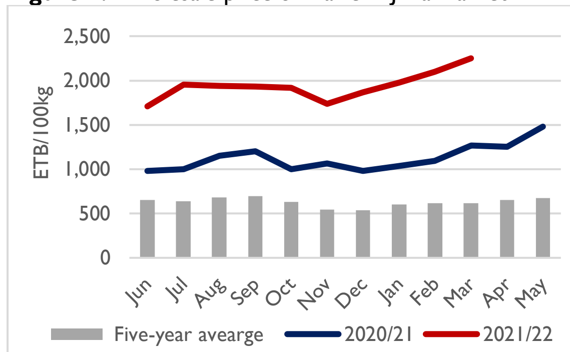
Labor Income: In central, eastern, southern Oromia, and along the Rift valley areas SNNP and Sidama regions, as well as agropastoral areas of Somali Region, agricultural labor opportunities are limited due to low planting amid poor *belg/gu/genna* rainfall. Income from labor, including agricultural labor, also remains limited across most conflict-affected areas of the country.

In southern and southeastern pastoral areas, more households are engaging in firewood, incense, gum, and building materials sales. Due to increased supply and low demand, prices of these goods have likely declined.

Nutrition: With multiple shocks limiting access to food, nutrition outcomes among children are deteriorating. According to ENCU, National Therapeutic Feeding Program admissions in January were around 43,600 children, over 50 percent higher than average. Find and Treat campaigns continue to be carried out, and results available from February found the levels of acute malnutrition to be predominately within 'Critical' levels in the Somali, Oromia, Amhara, Afar, and Tigray regions (Figure 6). It is important to note that there are limitations for humanitarians and health workers in areas affected by conflict, notably in Tigray, to access large parts of the population, so nutrition outcomes may be worse among those in inaccessible areas.

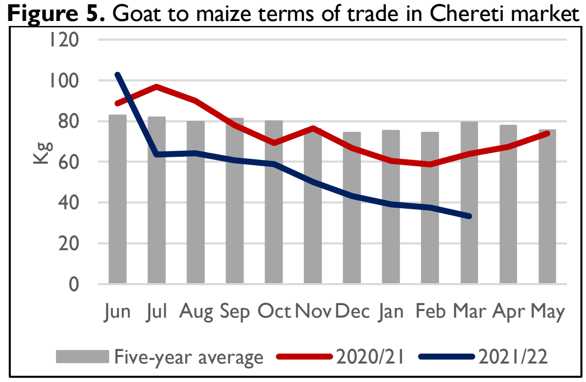
Humanitarian Assistance: According to the Prioritization Committee, as of mid-April, Round 4 of the national food aid distribution, which started in October, was nearly complete reaching about 11.9 million people. Round 5, which was launched in December 2021, is ongoing. As of mid-April, around 14.4 million people were reached with Round 5 assistance across the country outside Tigray, with about 181,100 MT of assistance from EDRMC, WFP, and JEOP. For households that received Round 5 assistance, the ration is expected to meet only about 15 percent of a beneficiary's needs over the five months from when aid distribution started through April. In mid-March, humanitarians launched 2022 Round 1 assistance. As of mid-April, the distribution of this assistance was nearly complete to 2.5 million people.

Figure 4. Wholesale price of maize in Jima market



Source: *ETBC*

Figure 5. Goat to maize terms of trade in Chereti market



Source: *Somali DPPC*

Figure 6. Proxy SAM and GAM rates by region as of January/February

Region	Proxy SAM rate	Proxy GAM rate
Afar	1.85%	28.69%
Amhara	2.61%	19.26%
Oromia	1.68%	17.97%
Somali	4.59%	28.26%
Tigray	2.61%	13.32%

Source: *ENCU*

In Tigray, between April 1 and 25, over 3,400 MT of food and some fuel arrived in the region, though this is less than five percent of the monthly need and challenges accessing adequate cash, fuel, and trucks persists. This assistance has been prioritized to towns and two refugee camps in the region. The distribution of the 3,400 MT is nearly complete, with less than 800 MT left in stock.

Current food security outcomes: Millions of households in northern Ethiopia, notably Tigray, require urgent humanitarian assistance, with at least Emergency (IPC Phase 4) outcomes ongoing and with populations in Catastrophe (IPC Phase 5). It is possible that outcomes are worse in areas of greatest concern of Tigray; however, information is insufficient to confirm or deny as conditions have continued to prevent needed data collection. In areas bordering Tigray, notably Wag Himra, household access to food and income remains constrained and continues to be of high concern.

In pastoral areas of southern and southeastern Ethiopia, the declines in milk availability and low terms of trade are driving continued limited food access. Households' ability to cope is declining, even among middle and better-off households. As a result, Emergency (IPC Phase 4) outcomes are widespread in southern Ethiopia. Crisis (IPC Phase 3) outcomes are ongoing in areas where livestock conditions are slightly better.

UPDATED ASSUMPTIONS

The assumptions used for the February to September 2022 Ethiopian Food Security Outlook remain unchanged, except for the following assumptions:

- Sorghum and maize exports from Ethiopia to Somalia will likely continue but at lower levels due to the below-average harvest in Ethiopia. Exports to Russia, Belarus, and Ukraine from Ethiopia represent less than 1.5 percent of total exports; however, exports from Ethiopia may be significant and adversely affected in some sectors, especially coffee, dried legumes, cut flowers, and the textile and perfume industries.
- The ability of the Ethiopian government to import food and other essential non-food commodities from the international market is expected to decline due to high global prices further.
- The government's ability to continue subsidies for fertilizers, seeds, and food is expected to be limited due to increasing international prices and limited supply within the country. This will drive food prices even higher. There is a possibility of protests, riots, and conflict associated with the food price increases, as observed in 2008 during the food price crisis.

PROJECTED OUTLOOK THROUGH SEPTEMBER 2022

During the June to September period, needs are going to seasonally peak at record high levels[1] due to the lean season in *meher* areas as well as drought and conflict. While food prices are expected to increase to slightly higher levels than previously anticipated, and household purchasing power will decrease for some households, it is not likely this will result in significant increases in the population in need during the lean season. It is likely that many households will face increased difficulty meeting their non-food needs. In Tigray, Emergency (IPC Phase 4) outcomes at a minimum are expected through at least September as households are expected to face extreme difficulty accessing food, while at the same time a de facto humanitarian blockade continues. In the rest of northern Ethiopia, food security is expected to be dire where Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes are likely as households continue to face difficulty accessing food.

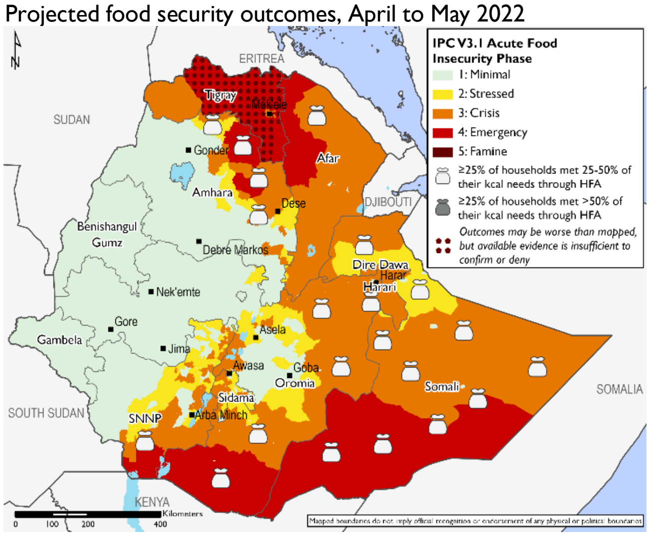
Emergency (IPC Phase 4) outcomes are likely to persist through at least September in Dawa, Liben, Afder, and some *woredas* in Shebelle and Korahe zones of Somali; South Omo of SNNP; Borena, East Bale, and lowland *woredas* in Guji; and West Guji of Oromia Region. Conditions are expected to decline in areas of East Bale, lowland *woredas* of Guji, and West Guji zones in Oromia as livestock holdings are expected to decrease. Households are likely to have limited amounts of credit to purchase food. Across these areas, households are anticipated to increasingly employ severe coping strategies such as excessive livestock sales, including female animals, begging, and relying on what credit is available. Some populations, specifically those who face the complete loss of their herds, are expected to be in Catastrophe (IPC Phase 5). Although not considered the most likely scenario, if the 2022 *gu/genna* rains fail and food assistance does not reach populations in need, food security could deteriorate to extreme levels, reflected in 'Extremely Critical' levels of malnutrition and high mortality.

[1] This statement is in relation to the time frame for which FEWS NET has comparable national needs estimates, which includes 2014-2022. Prior to 2022, the highest recorded needs in this time period were in 2016 following the El-Nino drought.

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE

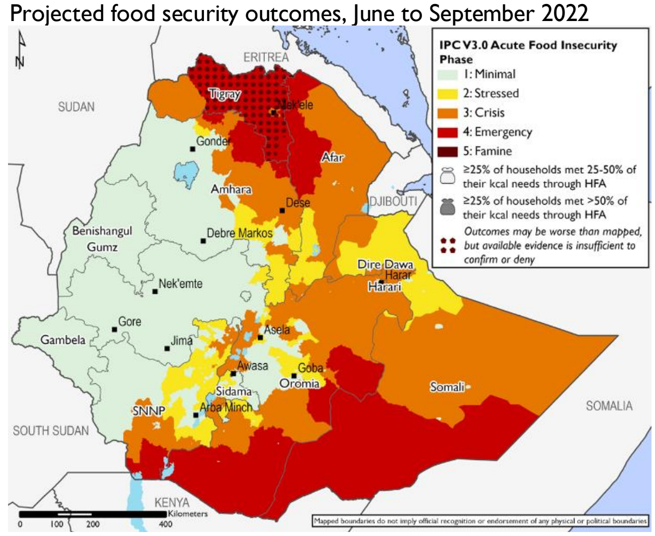
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food 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.

Projected food security outcomes, April to May 2022



Source: *FEWS NET*

Projected food security outcomes, June to September 2022



Source: *FEWS NET*

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 Update, April 2022: Extreme food insecurity persists in the north while outcomes deteriorate in the south amid historic drought, April 2022.

ABOUT THIS UPDATE

This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET's Food Security Outlook, which is published three times per year. Learn more about our work here.