FEWS NET FAMINE EARLY WARNING SYSTEMS NETWORK

WFP World Food Programme

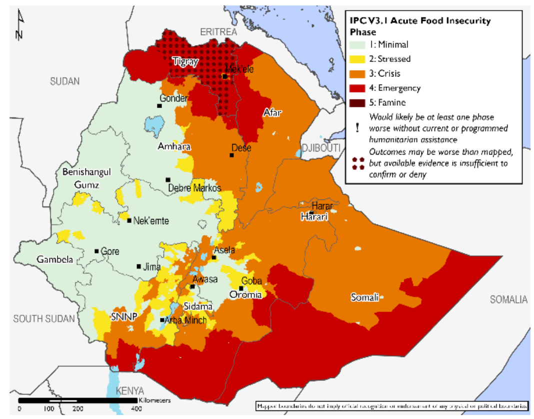
# ETHIOPIA Food Security Outlook Update — August 2022

*Renewed conflict in the north and historic drought in the south drive extreme concern for food insecurity*

## KEY MESSAGES

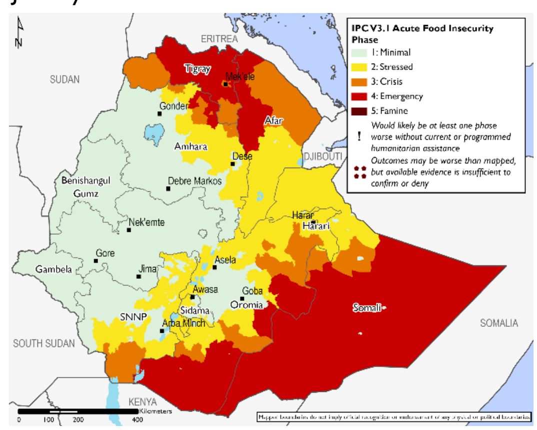
- Ethiopia is facing two extreme crises simultaneously: the resumption of conflict in northern Ethiopia and four consecutive seasons of drought in southern and eastern areas, inclusive of the worst *belg/gu/genna* season on record in 2022. Across most of these areas, at a minimum, Emergency (IPC Phase 4) outcomes are likely to persist through at least January 2023. Food assistance deliveries are helping to mitigate the size of household food consumption deficits, but current aid levels are not likely leading to large-scale improvements in acute food insecurity. In Tigray, more extreme outcomes than Emergency (IPC Phase 4) may be ongoing; however, sufficient data is still unavailable to confirm or deny this. In southern and southeastern pastoral areas, ongoing food assistance could be preventing more extreme outcomes; however, information on the contribution of the provided food assistance is insufficient to confidently substantiate the impact on household food consumption. Regardless, there is a risk that acute food insecurity outcomes could deteriorate to higher levels if assistance delivery is not timely or sustained.
- In late August, the five-month humanitarian ceasefire ended when conflict erupted along the southeastern border of Tigray and Amhara. Prior to renewed conflict, humanitarian assistance distributions were ongoing; however, in late August, renewed conflict has likely led to a reduction in distributions. Informal trade and smuggling have likely slowed to a near standstill, driving shortfalls of food and non-food supplies. Disruptions to agricultural activities and some harvest losses are likely, especially in areas directly impacted by conflict; however, the harvest is still expected to mitigate some of the most extreme consumption deficits starting in October.
- In southern and southeastern pastoral areas, households face extremely high food prices while relying on limited income for food purchases from livestock sales, casual labor, and the sale of firewood. Due to extreme drought, depleted pasture and limited water availability are driving large-scale livestock emaciation and deaths. Livestock deaths exceeded 4.5 million as of mid-August, according to regional governments, and prospects for new livestock births and milk availability are minimal to none in late 2022. The 2022 October to December *deyr/hageya* season is expected to be well below average, marking a historic fifth consecutive poor season. Moreover, early forecast models are indicating increased probabilities of a below-average 2023 March to May *gu/genna/belg*, which could extend severe food insecurity into mid- to late 2023.
- Historically poor February to May *belg* rainfall across most *belg*-receiving areas has led to poor to failed harvests in July/August. Furthermore, while June to September *kiremt* rainfall did allow for some short-cycle *meher* crops, national *meher* production is also expected to be below normal. Overall, national *belg* and *meher* production in 2022 is likely to be below average. While the harvest is still expected to relatively improve food consumption for many households given the seasonal availability of own-produced foods, their food stocks are not anticipated to last beyond early 2023.

Projected food security outcomes, August to September 2022




Source: *FEWS NET*

Projected food security outcomes, October 2022 to January 2023




Source: *FEWS NET*

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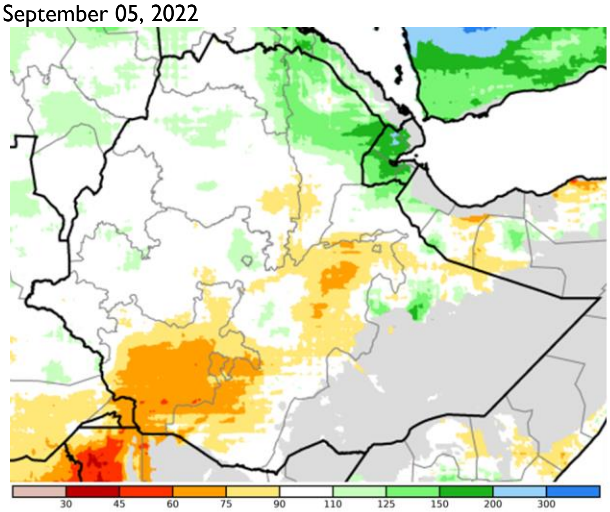
## CURRENT SITUATION

***Rainfall:*** Recent analyses by FEWS NET science partners found that the 2022 March to May *gu/genna/belg* rainy season was the worst on the historical record. However, broadly favorable June to September *kiremt* rainfall has led to a decrease in the extent of the dryness in most northern and western areas.

In general, the *kiremt* rainfall season has been variable with average to above-average rainfall across large areas of Oromia, Tigray, and Amhara, while rainfall has performed poorly in southern and central areas of the Rift Valley and eastern highland crop growing areas (Figure 1). Despite the late start of *karma/karen* rains in July in northern pastoral areas, cumulative rainfall to date for the season is near average. According to federal and regional government reports, heavy rains in July and August resulted in riverine flooding in southern Afar and Gambella regions.

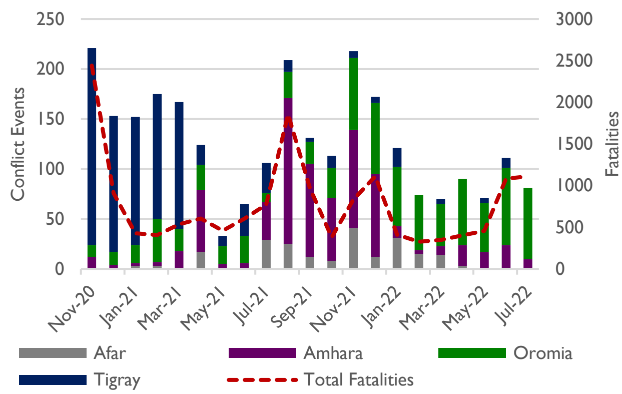
**Figure 1.** Rainfall as a percent of normal from June 1 to September 05, 2022




Source: *UCSB/CHC*

***Conflict*:** For most of mid-2022, while conflict was relatively low in northern Ethiopia, high and increasing conflict was reported in Oromia, Somali, Benishangul-Gumuz, and SNNP regions (Figure 2). In late August, after about five months of a relative lull in conflict in Tigray, conflict broke out between the Tigrayan and government forces along the Amhara and Tigray border, ending the humanitarian ceasefire. Conflict in the last week of August has escalated in Tigray with reports of conflict on multiple fronts, including Western, Southern, and Central Tigray and some northeastern Amhara areas and northwestern Afar.

**Figure 2.** Conflict events and fatalities in select regions from November 2020 to July 2022




Source: *ACLED*

Conflict in Oromia between armed actors continues, more than doubling the number of conflict events between May and mid-August 2022 as compared to the same time period in 2021. In the Somali Region, al-Shabaab carried out an attack in Afder Zone in late July, the first attack in almost a decade. In addition, violence against civilians and destruction of property have been reported since March in South Omo, Derahse, and Konso areas of SNNPR. Overall, the continued conflict is disrupting livelihood activities – including the ongoing *meher* agricultural season – destroying infrastructure, and limiting population movement and trade flows.

***Displacement:*** According to the latest displacement survey from IOM published in August with data collected in March/April, 2.7 million people are displaced in Ethiopia, excluding those displaced within Tigray and conflict-affected areas of Amhara and Afar bordering Tigray.[1] The top two causes for displacement are conflict and drought, with most displaced populations concentrated in the Somali and Oromia regions. According to the government, over 100,000 people were displaced in Wag Himra and North Wello zones of Amhara due to conflict. Given the recent uptick in conflict, it is likely leading to increased displacement.

In Afder and Shabelle zones, around 14,000 households were displaced in July due to the attack by al-Shabaab; however, given relative calm since the attack, they are likely slowly returning to their homesteads. Displacement is also ongoing in southern and southeastern pastoral areas due to the drought, as households facing severe food shortages relocate near towns in order to access food assistance or seek labor opportunities for income to purchase food.

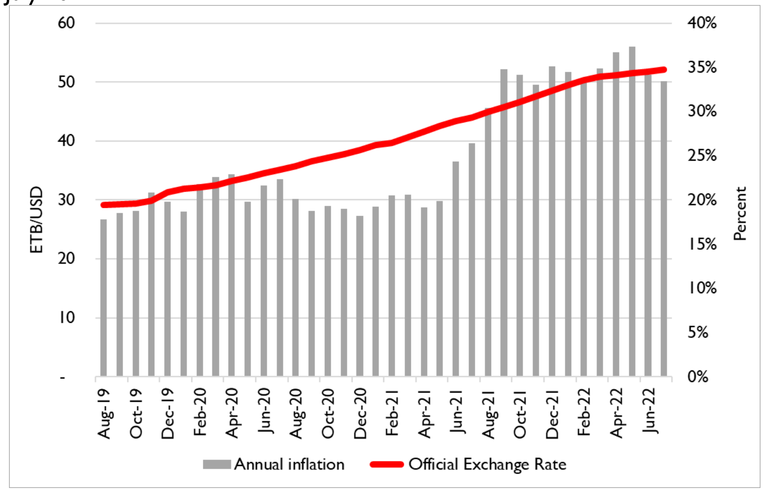
Furthermore, flooding in the western and northern areas of the country has led to some displacement. According to OCHA, flooding in Gambella displaced over 4,000 households in Lare and Itang *woredas.* Some localized displacement has also occurred in Amhara Region.

[1] Updates on the total displaced population in northern Ethiopia are currently unavailable.

***Crop production:*** The 2022 *belg* harvest is nearly complete. Nationally, *belg* production is expected to be below average. In areas of SNNPR and central and eastern Oromia, the *belg* season failed. According to the multi-agency *belg* 2022 seasonal assessment, as of late July, *belg* crop production is expected to range from about 20 to 50 percent of average across *belg*-producing areas.

Generally, most households shifted to planting short-cycle *meher* crops. Planted crops are in the growing to flowering stages, and despite favorable *kiremt* rainfall, cropping conditions are poorer than typical in areas of the country due to the poor rainfall.

**Figure 3.** Annual inflation and official market exchange rate, August 2019 to July 2022




Source *CSA; NBE*

Favorable *kiremt* rains facilitated the planting of short-cycle lower yield crops, except in conflict-affected areas. According to the Amhara Regional Agriculture Bureau as of late August, area planted was about 80 percent of normal for *meher* crops. Crops are currently in the vegetative and flowering stages in good and near-normal condition; however, in the Rift Valley areas of central and western Oromia, parts of Sidama, much of SNNNP, and the lowland areas of East and West Hararghe, crop development is poor, primarily driven by the poor weather conditions. There is additional concern for root crops in southern Rift Valley areas in Sidama and SNNP regions, which are a key food source for many households.

***Pasture and water availability:*** In northern pastoral areas, the ongoing *karma/karan* rainfall is supporting some regeneration of pasture and water points in areas that were negatively affected by the historically poor *belg/diraac/sugum* rains. Nevertheless, pasture and water availability remain lower than normal for this time of year. In most southern and southeastern pastoral areas, water and pasture availability is minimally available. Some of the only greenery available is from invasive species that are not edible by livestock.

***Livestock migration:*** In Afar and northern pastoral areas, livestock migrated to areas around the Awash River and Amhara during the dry season and have yet to return to their area of origin as pasture is not wildly available. The main grazing areas bordering Afar and Tigray are not accessible to herders due to ongoing conflict.

Livestock migration continues across southern and southeastern pastoral areas as well as to and from Somalia as pastoralists search for any available pasture. There are also reports of some livestock migrating to riverine areas, where some pasture and water are potentially available. Additionally, some livestock are unable to migrate due to their poor body condition. In the worst-drought affected areas of Borena Zone in Oromia and in Dawa, Liban, and Afder zones of Somali Region, there are no viable migration options for livestock due to pasture and water scarcity.

***Livestock condition and productivity:*** In northern pastoral areas, particularly in Afar, livestock body conditions are improving but still range from below average to fair. According to the Afar regional government, 10,000 livestock have died due to drought and another 220,000 have died due to the conflict since June 2021.

In southern and southeastern pastoral areas, livestock body conditions are extremely poor to emaciated among all species, although notably worse for cattle. While milk is typically not readily available at this time of year, there are few to no pregnant livestock, with minimal prospects that milk will become available. Livestock deaths are widespread, with concerns that an increasing number of people are losing their herds and losing their primary income source. According to the regional governments, as of mid-August 2022, around 4.54 million livestock had died.

***Macroeconomy:*** Low exports and international budgetary support continue to contribute to poor macroeconomic conditions (Figure 3). According to the Central Statistical Agency (CSA), annual inflation in August was 32.5 percent, which reflects a slight, three-percentage point decline compared to June and July. However, non-food inflation increased slightly by over one percentage point between July and August, while food inflation decreased by over two percentage points. While inflation slowed in the last three months, the cost of living continues to increase due to high annual inflation, which is reflected in the increasing Consumer Price Index (CPI).

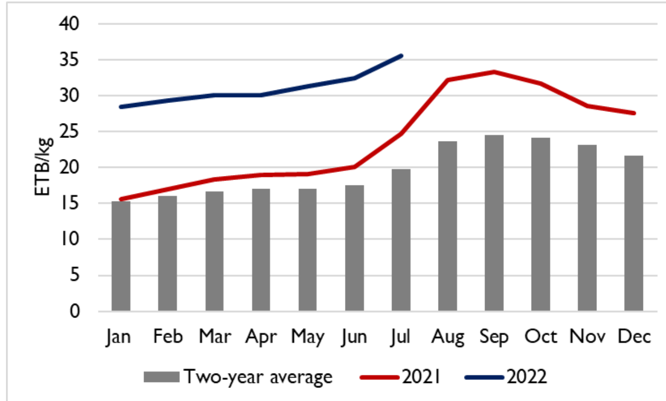
According to the Central Bank of Ethiopia (CBE), the official exchange rate in July and August was 52 ETB/USD, similar to June but 18 percent higher than July 2021. Rising transportation costs in the last two months from fuel price increases, which are linked to the government easing of fuel subsidies in July, are further contributing to the high staple food prices.

***Market supply and functioning:*** Staple food supplies across most markets are lower than normal for this time of year. Supplies are particularly low in conflict-affected areas, most notably including northern Amhara, eastern Afar, and Tigray. In Tigray, market supplies are minimal. Prior to the rise in conflict in late August in Tigray, some informal importing was occurring across the borders with Amhara. Additionally, markets continue to function minimally within the region, including bartering among households, due to the limited availability of currency and low household purchasing power. In other conflict-affected areas of the country, conflict events temporarily disrupt market functioning, but when conflict subsides, market functioning returns to near-normal levels.

***Staple food prices:*** Staple food prices across most of the country are significantly higher than last year and the five-year average due to the below-average market supply, increased transportation costs, decline in food imports, and high global food prices.

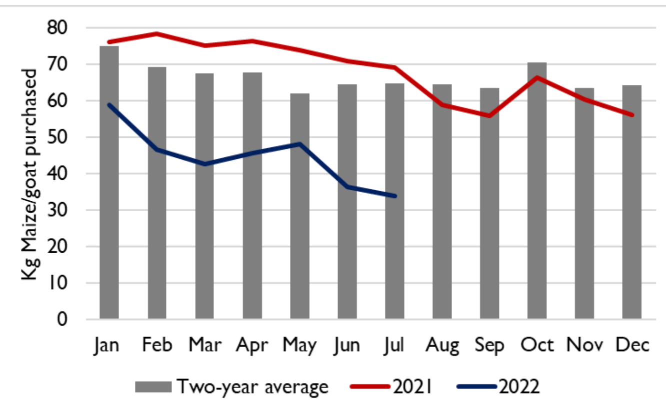
Maize prices in Addis Ababa increased by 10 percent between June and July and are 44 percent higher than the same time last year (Figure 4). In most parts of Tigray and conflict-affected areas of Afar and Amhara, prices of staple foods are sharply increasing and much higher than seasonally typical. According to key informants, July prices in Eli-Daar market, which is in a conflict-affected area of Afar, wheat is about 2,500 ETB/50kg, which is more than double the price observed before the start of conflict in November 2020. Similarly, in Sekota market of Amhara Region, sorghum prices in July were around 35 percent higher than the same time last year and approximately 70 percent higher than the five-year average.

**Figure 4.** Maize prices (ETB/kg) in Addis Ababa




Source *FEWS NET*

**Figure 5.** Goat-to-maize terms of trade in Chereti, Somali Region




Source *FEWS NET*

Staple food prices in most southern and southeastern pastoral areas also remain high. In Chereti, maize prices in July were about 20 and 60 percent higher than June 2022 and July 2021, respectively.

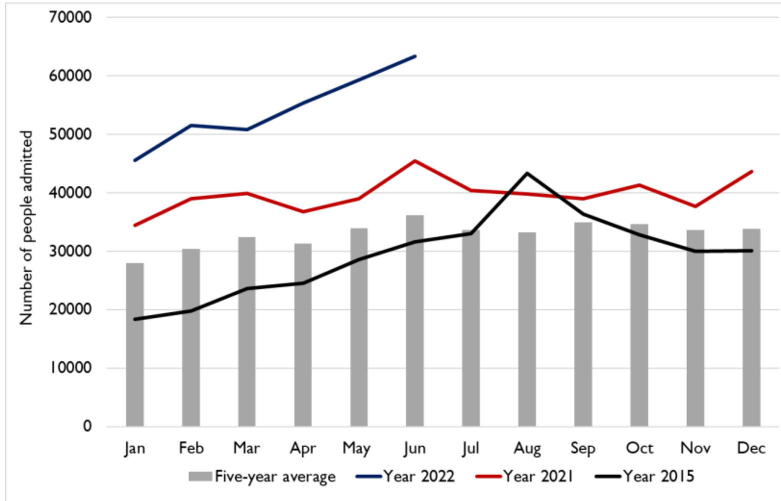
***Livestock supply and prices:*** In southern and southeastern areas, livestock prices in July continue to decrease due to high market supply and poor livestock conditions, though inflationary market pressures have kept prices above average overall. Despite above-average prices, many livestock are becoming unsellable due to emaciation. Furthermore, the terms-of-trade (ToT) have drastically decreased across all the pastoral areas. Currently, one goat can buy about 30 kg of maize, whereas in January, a goat could buy 60 kg of maize—a 50 percent decline in the value of a goat over six months (Figure 5).

***Income from labor and self-employment:*** Labor demand and opportunities are generally normal in most western areas of the country due to conducive seasonal rainfall for agricultural activities. Labor opportunities and migratory labor remain limited to nonexistent in Tigray and adjacent areas of Amhara and Afar due to insecurity and low financial capacity among better-off households to hire labor. Local and migrant labor to SNNPR and Sidama for coffee and other cash crop cultivation is higher compared to conflict-affected areas, but labor income is still below average due to high labor supply. In parts of central and eastern Oromia, much of SNNP, and Sidama regions, labor opportunities are below normal, particularly in agriculture.

The drought in southern and southeastern pastoral areas has also significantly reduced household income from livestock rearing and agricultural labor. More households are engaged in firewood sales, incense/gum collection, and sales of building materials, but income from these sources remains significantly below average due to increased supply and low demand.

Similarly, informal labor opportunities in most urban areas of the country are lower than average due to the weakened construction activities and the soaring cost of construction materials.

**Figure 6.** Trend in national Therapeutic Feeding Program admissions




Source: *ENCU*

***Humanitarian Assistance:*** According to the Food Cluster, as of late August, Round 1 distribution was nearly complete, while Round 2 and Round 3 assistance distribution is underway across much of the country, apart from Tigray. Round 1, launched in April, has reached 7.7 million people over four months. Round 2, launched in early June, has reached about 4.2 million people. As of late August, according to OCHA, Round 3 distributions have started with over 400,000 people reached. Typically, distributions take place every six weeks; however, with delays and based on agreed-upon timelines of assistance distributors, distributions among households are only happening every eight weeks, or even longer in areas like Tigray. According to the Food Cluster, Round 1 of the 2022 humanitarian assistance cycle was launched in early August in Tigray; however, humanitarian assistance distributions were significantly disrupted in late August due to fuel and cash shortages alongside the recent uptick in conflict. In August, according to the Food Cluster, around 1.0 million people received assistance in Tigray.

***Nutrition:*** According to the Emergency Nutrition Coordination Unit (ENCU), Therapeutic Feeding Program (TFP) admissions in June were around 76 percent higher than the five-year average, indicating the presence of increasing levels of acute malnutrition (Figure 6). Most TFP admissions were reported from drought-hit eastern and southeastern pastoral areas, and conflict- and drought-affected northern parts of the country. The WFP Emergency Food Security Assessment (EFSA) in June 2022 in Tigray revealed a proxy GAM of 29.4 percent, indicative of 'Critical' levels of acute malnutrition at the region level. At the area level, several clusters/zones had a proxy GAM rate approaching or above the 'Extremely Critical' thresholds.

A find-and-treat campaign carried out in May in Dawa Zone of the Somali Region indicated a proxy SAM of 3.0 percent and a proxy GAM of 34.1 percent, indicative of 'Extremely Critical' levels of acute malnutrition. In June, the find-and-treat campaign undertaken in some *woredas* of Sidama found a GAM rate within the 'Critical' levels at 10.4 percent. In conclusion, most of the available recent MUAC screening data illustrates that acute malnutrition levels are within the 'Critical' (GAM 15-29.9 percent) and 'Extremely Critical' (GAM ≥30 percent) levels in most conflict- and drought-affected areas of the country.

***Current food security outcomes***: Food security in Ethiopia is deteriorating rapidly, predominately in northern, southern, and eastern parts of the country. The consecutive years of drought and continued conflict are driving large food consumption gaps at a minimum, with households facing almost insurmountable difficulty accessing food and income.

In Tigray, access to food is constrained by very limited food stocks, exceptionally high food prices, and inadequate income, driven by conflict-related disruptions to local livelihoods. According to the WFP EFSA assessment carried out in June, nearly 60 percent of surveyed households were employing emergency or crisis livelihood coping strategies. The most severe strategies include begging, illegal activities, and prostitution. The Household Hunger Score (HHS), which shows a household's experience of hunger, found eight percent of surveyed households had hunger indicative of Catastrophe and 44 percent of surveyed households had hunger indicative of Emergency (IPC Phase 4). The EFSA survey results and the find-and-treat acute malnutrition campaigns suggest that levels of hunger and acute malnutrition are consistent with widespread Emergency (IPC Phase 4) outcomes with some households in Catastrophe (IPC Phase 5), at a minimum. Furthermore, given prevailing access constraints and that conditions have worsened since June, it remains possible that outcomes are currently even more severe, though available information is insufficient to confirm or deny this. In northeastern Amhara and northeastern Afar, food insecurity is dire, with extremely poor food consumption due to the impacts of conflict, leaving poor households in Emergency (IPC Phase 4). In areas of Amhara that receive the *belg* harvest, Crisis (IPC Phase 3) is ongoing.

Drought over four seasons in the last two years in southern and southeastern pastoral areas is leading to extremely limited access to food and income for households. Households are relying on limited coping capacity as they have a limited ability to sell excess livestock, access gifts from the better-off, and expand their income-earning opportunities. As households have declining assets, more households are being displaced to towns or sending their children to relatives in nearby towns. Despite these efforts, food consumption deficits are increasing across much of the region. Emergency (IPC Phase 4) outcomes are ongoing in the worst drought-affected areas, while Crisis (IPC Phase 3) outcomes are ongoing in the rest of the region.

## UPDATED ASSUMPTIONS

The assumptions used for June 2022 to January 2023 Ethiopian Food Security Outlook remain unchanged except for the following conflict assumptions:

- The conflict in Tigray between actors will likely continue at recently escalated levels. As a result, humanitarian access and assistance delivery to Tigray is expected to be limited due to the recent uptick in conflict.
- An increase in incursions should be expected throughout the projection period; however, they are not likely to lead to significant displacement or conflict escalation as al-Shabaab has limited capacity to strike major population centers, given the robust counterterrorism system of the Ethiopian government.

## PROJECTED OUTLOOK THROUGH JANUARY 2023

While the *meher* harvest beginning in October is expected to lead to lower levels of acute food security in several areas of Ethiopia, acute food insecurity is expected to remain dire in areas of northern Ethiopia due to the prolonged impacts of conflict and in southern and southeastern pastoral areas of Ethiopia due to the impacts of an anticipated, fifth consecutive below-average rainy season. Widespread Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes will persist in these areas through at least January 2023.

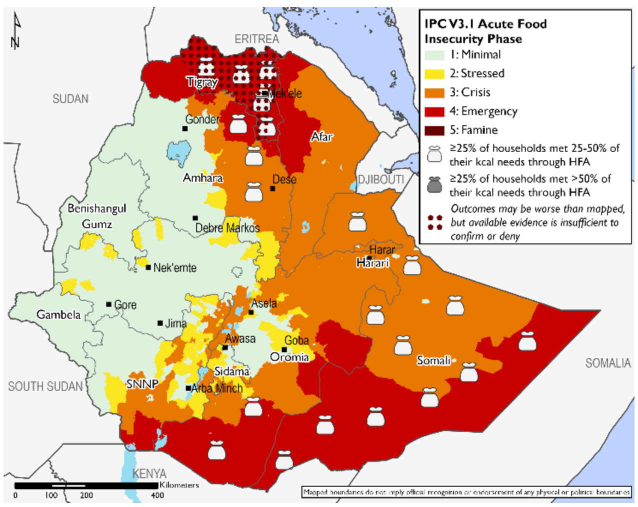
In southern and southeastern pastoral areas, the historic five-season drought is expected to drive widespread Emergency (IPC Phase 4) outcomes, with an increasing number of households likely to face Catastrophe (IPC Phase 5). Given minimal access to milk and income from livestock sales, along with few self-employment activities for food purchases, households are expected to have significant difficulty accessing food. Humanitarian aid is expected to mitigate food consumption deficits among beneficiary households; 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 very high 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. Furthermore, while this period of time lies beyond FEWS NET's projected outlook period, early forecasts indicate a likely below-average March to May 2023 *gu/genna* rainfall season. Consequently, severe to extreme food security conditions are expected to continue until at least the subsequent rainfall season in late 2023.

In Tigray and bordering areas of Amhara and Afar, severe to extreme food insecurity is expected to persist at the peak of the lean season in August and September, especially given the resumption of conflict and the associated decline in humanitarian access. The resumption of conflict is of high concern, especially within Tigray, where informal trade and humanitarian assistance distributions have already drastically declined. However, while conflict-related disruptions to agricultural activities are likely to occur in some areas, the *meher* harvest starting in October is still expected to somewhat alleviate the size of household food consumption deficits. As a result, marginal improvement in acute food insecurity conditions is expected from October to January. The availability of *meher* stocks is expected to avert the persistence of extreme kilocalories deficits for many households, but more substantial improvement in acute food security is not expected. Therefore, Emergency (IPC Phase 4) outcomes with some households in Catastrophe (IPC Phase 5) will most likely continue through at least January 2023. During this period, a risk remains that outcomes could become worse than Emergency (IPC Phase 4) if escalating conflict significantly disrupts households from engaging in the harvest and/or prevents populations from moving in search of food once households exhaust their 2022 *meher* harvest food stocks.

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

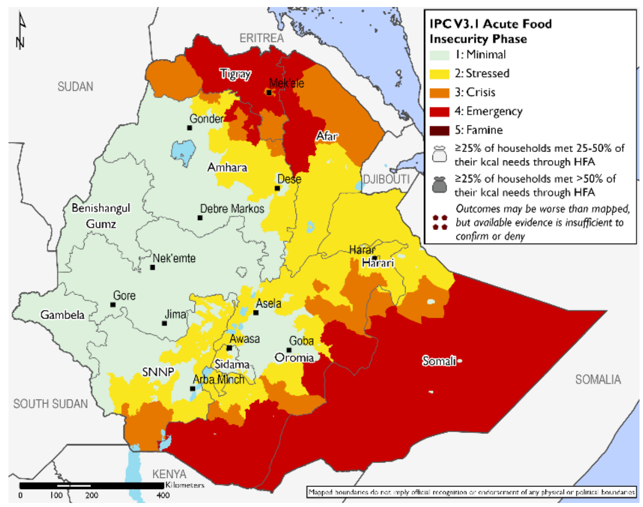
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food 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, August to September 2022




Source: *FEWS NET*

Projected food security outcomes, October 2022 to January 2023

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*FEWS NET:* Ethiopia Food Security Outlook Update, *August 2022: Renewed conflict in the north and historic drought in the south drive extreme concern for food security, August 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.