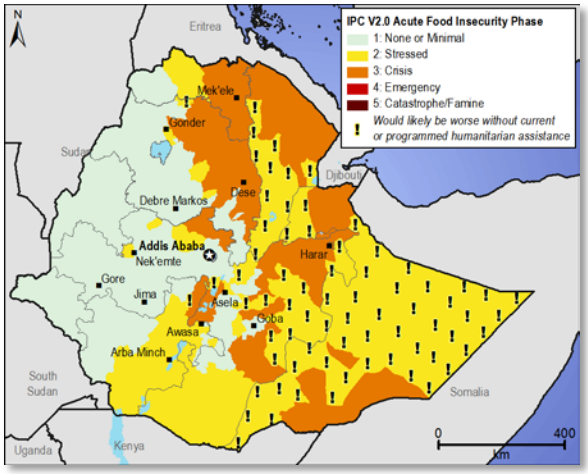
# ETHIOPIA Food Security Outlook July to December 2013

## *Food security improved in the southern and southeastern parts of the country*

### KEY MESSAGES

- *Belg*-producing areas of Amhara, Tigray, and parts of Oromia Regions will continue in Crisis (IPC Phase 3) through September primarily due to poor *Belg* crop production caused by the delayed onset and below normal total rainfall in many areas, long dry spells during the rains, the early cessation of the *Belg* rains, and armyworm infestations in some areas.
- From October to November, food security is expected to improve from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) in most parts of the country with exception of the *Belg*-dominant areas of North and South Wollo Zones in Amhara, northern parts of Afar, and some parts of Sitti, Afder, and Liben Zones in Somali Region, which will likely remain in Crisis (IPC Phase 3).
- The June to September *Kiremt* rains are expected to be normal to above normal in most parts of the country except in the Northwest. The well below normal *Kiremt* rainfall so far in some northwestern parts of the country have been less than half of usual totals, which had reduced planted area to only 58 percent of the five-year average in Western Tigray Zone by the beginning of July. Such a reduction in the planted area possibly will have a significant impact on the overall sorghum and sesame production, both at the national and regional levels. Even if short-cycle crops are planted, their yields will be less than from those of long-cycle varieties.
- The poor performance of the *Belg* season has made current staple food prices increase or remain at their already elevated levels above prices from last year, affecting market-dependent households, especially the poor and very poor households in northeastern *Belg*-producing areas. However, a reduction in staple food prices is expected from October to December, following the *Meher* harvest coming into markets, increasing supply.

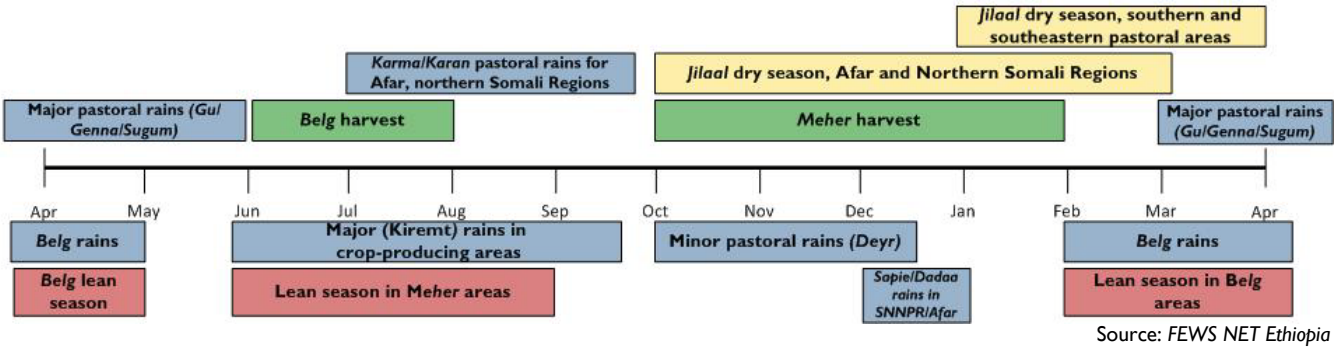
**Figure 1.** Current food security outcomes, July 2013




Source: *FEWS NET Ethiopia*

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect *chronic* food insecurity. Visit www.fews.net/foodinsecurityscale for more on this scale.

### SEASONAL CALENDAR FOR A TYPICAL YEAR

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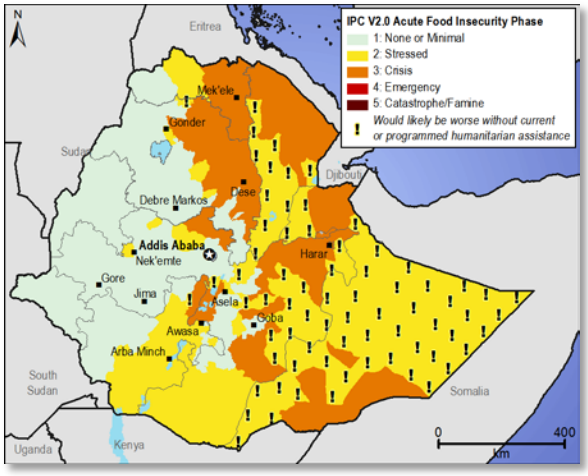
## NATIONAL OVERVIEW

*Current Situation*

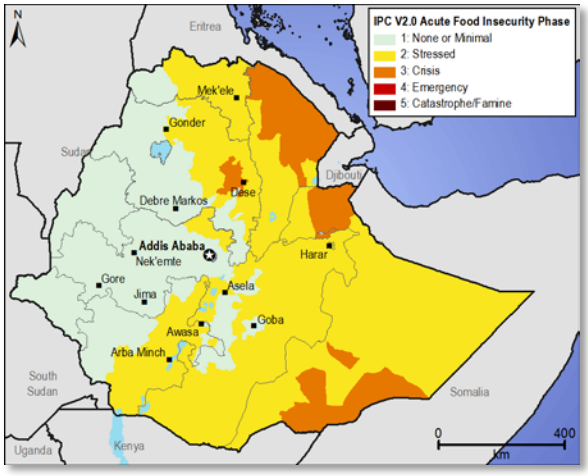
- Apart from some areas of eastern Tigray, eastern Amhara, northern Afar, northern Somali, and eastern Oromia which are in Crisis (IPC Phase 3), the remaining parts in the eastern parts of the country are Stressed (IPC Phase 2). The western surplus-producing areas of the country are currently at Minimal (IPC Phase 1).
- Compared to the last two years, overall *Belg* production in Southern Nations, Nationalities, and Peoples' Region (SNNPR) and East and West Haraghe Zones of Oromia Region increased. However, overall, the February to May *Belg* rains performed poorly due to a late start, an early cessation, and below average rainfall totals in many areas, leading to below average crop production, particularly in the northeastern *Belg*-producing areas of Tigray and Amhara Regions as well as the central parts of Oromia Region. With the below average *Belg* harvest ongoing in many areas, the overall, national *Belg* crop is likely to be somewhat below average.
- Except for Sitti Zone and northern parts of Afar, most pastoral areas in the country have received normal to above normal total rainfall from March to May. This has helped browse, pasture, and water sources to regenerate and improved animal body conditions and productivity. The situation is particularly improved in the southern and southeastern pastoral areas as the good performance of the 2012 October to December *Deyr/Hageya* and the following *Gu/Genna* rains were both favorable for livestock production. In these areas, total *Gu/Genna* rainfall was, on average, around 75 percent above average. The situation is much worse in the northern pastoral areas where the March to May *Gu/Sugum* rains were generally around 10 percent below average.

**Figure 2.** Projected food security outcomes, July to September 2013




Source: *FEWS NET Ethiopia*

**Figure 3.** Projected food security outcomes, October to December 2013




Source: *FEWS NET Ethiopia*

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- The National Metrological Agency (NMA) predicted normal to above normal total June to September *Kiremt* rainfall in most *Kiremt*-receiving areas except in the northwestern parts of the country where below normal total rainfall was expected. Thus far, the performance of the *Kiremt* rains coincides with the NMA forecast. The *Kiremt* rains are performing well in most *Kiremt*-receiving areas with near normal total rainfall and timing of the start of season. This has led to normal timing of agricultural activities like land preparation, planting, and weeding in most parts of the country.
- In the northwestern part of the country and along the Sudan border, total June to September Kiremt rainfall has been well below average. In general, the rains have not become well established in these areas. The much below average rains thus far in northwestern parts of Amhara and Tigray Regions has delayed agricultural activities, particularly the planting of sorghum and sesame.
- Following the seasonal pattern, staple food prices remained at their elevated level in most parts of the country from May to June. The overall consumer inflation rate calculated using the consumer price index (CPI) as compiled by the Central Statistical Agency (CSA) in June was 7.4 percent at an annualized rate while food price inflation at 3.7 percent. These figures were 6.3 percent and 3.4 percent respectively for May 2013.

*Assumptions*

From July to December 2013, the projected food security outcomes are based on the following key assumptions:

- As the National Meteorology Agency's (NMA) seasonal forecast suggests, the June to September *Kiremt*/*Karan*/*Karma* rainfall amounts, distribution both over space and time, and timing of the cessation are likely to be near normal in most areas, except the northwestern areas that are anticipated to receive below normal total *Kiremt* rainfall.
- In southern and southeastern parts of the country, the October to December *Deyr*/*Hageya* rains are expected to be fairly well distributed with near average to below average total rainfall.
- Average national *Meher* production from October to January is expected due to the anticipated normal to above normal *Kiremt* rain performance in most areas. However, the total sorghum production from *Meher* harvest is expected to be below average due to below average production in northwestern parts of the country. In addition, the poor performance of *Belg* rains in eastern parts of Tigray and Amhara affected long-cycle sorghum planting that will also reduce the overall, national-level sorghum production.
- Staple food prices are expected to remain fairly stable. In areas with some *Belg* harvest, it will start coming onto markets in July, but food prices in most markets are expected to continue to remain stable at their currently elevated level from July to September due to seasonally rising market demand and the overall tight grain markets. Staple food prices will show some slight declines from October to December due to improvement in market supply from the *Meher* harvest.

*Most Likely Food Security Outcomes*

Households in most western and central surplus-producing areas of the country are able to meet their essential food and non-food needs from their own production from previous *Meher* harvests and in the coming months will meet these needs from the anticipated average 2013 *Meher* harvest from October to January. These areas are expected to remain at Minimal (IPC Phase 1). Because of the below average 2012 *Meher* production in some parts of western and central parts of the country, the poor and very poor households in these areas are classified as Stressed (IPC Phase 2) through September, but they will improve to Minimal (IPC Phase 1) following the start of the *Meher* harvest in October.

The 2013 *Belg* production in *Belg*-producing areas of eastern Amhara and Tigray and North Shewa Zones in Oromia Regions is estimated to be much below normal. This means households in these areas will need to continue purchase of food from markets due to the prolonged lean season stretching into September or October. With already high prices that are likely to increase or remain at their elevated level until October, households will need to deplete assets in order to purchase food. They will face Crisis (IPC Phase 3) from July through September. However, the expected average *Meher* production in these areas will allow households to move into Stressed (IPC Phase 2) from October to December, except for the *Belg*-dominant areas in Amhara Region that will remain in Crisis (IPC Phase 3) due to the usual, lower *Meher* production levels in these areas and the especially poor *Belg* production in these areas this year.

The relatively better performance of the *Belg* season in *Belg*-producing areas of SNNPR will improve household's food access through their own production, income from crop sales, and a slight decline in staple food prices from July to September. In addition, the expected average *Meher* season harvest will still enable households in SNNPR to minimally address their food needs. Therefore, except households in *Meher* cropping areas of SNNPR that do not grow *Belg* crops and which are likely to face Crisis (IPC Phase 3)from July to September at the peak of their usual lean season due to poor production and stocks from the 2012 *Meher* harvest, poor and very poor households in the remaining parts of the region will be Stressed (IPC Phase 2) from July until at least December. Due to the anticipated average *Meher* production, households in Guraghe, Silte, and Alaba will also remain Stressed (IPC Phase 2) from October through December.

In the northwestern areas of the country, including in Western Tigray, these typically surplus-producing areas for sorghum and sesame have had far below average June to September *Kiremt* rainfall so far, and even as the rains become establish, total rainfall is not expected to recover by the end of the season. Below average *Meher* crop production could reduce overall supply at the national and regional level for both sorghum and sesame, the key cash crops in this area. According to the Central Statistical Agency (CSA), during the 2012 *Meher* season Northwestern and Western Zones of Tigray Region contributed for 70 percent and 10 percent of the total regional and national sorghum production, respectively. Thus, this

poor performance of the *Kiremt* rain in the northwestern parts of the country is expected to contribute for a reduction of total sesame exports as well as reduced supply of sorghum, particularly in Tigray Region. Planting short-cycle sorghum will contribute to some harvest, but overall, production will likely be reduced. Households in this area typically have some cash savings or easily saleable assets and they are expected not to engage in any coping in order to feed themselves between now and December, likely remaining in Minimal (IPC Phase 1).

The poor performance of the 2013 *Gu*/*Sugum* rains in Sitti Zone and northern parts of Afar Regions along with some localized areas in southern Somali reduced the availability of pasture, browse, and water. This has led to a deterioration on livestock body conditions and their productivity, which limits access to milk. This will decrease income from sale of livestock and their products between now and December beyond the usual seasonal reduction with the dry season. The below average total rainfall from the March to May *Gu*/*Sugum* coupled with the recurrently poor total seasonal rainfall performance, in some areas fairly frequently since 2009, are not expected to improve immediately with the anticipated near average total rainfall from the June to September *Karan*/*Karma* rains. Accordingly, poor households in these areas have limited ability to effectively cope, so they will be in Crisis (IPC Phase 3) from July through at least December.

On the other hand, in the remaining pastoral areas of the country, livestock production and thus food security have improved due to the relatively better performance of the March to May *Gu*/*Sugum*/*Genna* rains as well as the 2012 rainy seasons that have led to sustained improvements in livestock body conditions and productivity. However, the lingering effects of recurrent droughts from 2009 to 2011 in these areas led to asset depletion and smaller herd sizes, so households have not fully recovered and are able only to minimally address their food needs. The anticipated normal June to September *Karan*/*Karma* rains in northern pastoral areas and *Deyr*/*Hageya* rains in southern and southeastern pastoral areas are expected to enable households to continue addressing their minimal food needs but not necessarily all of their essential non-food needs. Therefore, poor and very poor households in Fafan Zone in northern Somali and most parts of the southern and southeastern pastoral areas will be Stressed (IPC Phase 2) from July to at least December.

## AREAS OF CONCERN

### Southern and southeastern pastoral and agropastoral areas

*Current Situation*

Due to excessive rain and flooding during the March to May *Gu* rains, most agropastoral households in Shabelle, Dollo, Korahe, and Liben Zones in Somali Region had well below average crop production, in part due to a failure to plant in some areas. On the other hand, following early onset and good performance of *Genna* rain in most agropastoral households in the lowlands of Bale and Guji Zones in Oromia Region were able to plant normal or slightly above normal amounts of land.

Except in Dolobay, West Imey, Hargelle, Cherati, and Barey Woredas in Afder Zone, the well above average total March to May *Gu/Genna* rainfall improved pasture, browse, and water availability in most parts of southern Somali and in lowland areas of Bale, Guji, and Borena Zones in Oromia Region. Water sources that were replenished during the *Gu* season generally still contain two to three months worth of water. Almost all water harvesting structures like *birkads*, ponds, and *elas* were replenished, especially in areas that received larger amounts of the *Gu*/*Genna* rains. No major unusual or non-seasonal livestock migrations or disease outbreaks were reported. With the exception of some pocket areas that received below normal total *Gu* rainfall, livestock body conditions and their productivity are improving.

In June, cereal prices in most of the southeastern Somali Region markets had risen since last year. For instance, maize prices in June in Afder, Gode, Deghabur, Fik, and Liben increased between 180 to 214 percent since June 2012. Similarly, goat and sheep prices increased between 143 to 185 percent in Deghabur, Gode, and Liben from June 2012 to June 2013. Compared to last year, livestock and cereal prices also showed an increase in the lowland areas of Bale. On the other hand, in Guji Zone, cereal prices have been stable while livestock prices decreased. Local wage rates in Guji Zone increased around 160 percent from June 2012 to June 2013. Imported food items like sugar, wheat flour, and rice prices in southeastern pastoral areas are increasing due to lower than usual imports from Somalia due to government efforts to formalize the trade and collect import tariffs.

The recent improvements in livestock body conditions and productivity contributed to increased income from livestock and milk sales, increased wage rates, and increasing frequency and amount of gifts and *zekat*, a social support mechanism of alms-giving or charitable giving by the better off. However, the rise in cereal prices in most of the markets have outpaced the rise in livestock values, thus leading to a decline in livestock to cereal terms of trade (ToT). This means some poor and very poor households may still have difficulty accessing food, despite improved livestock values and healthier herds. In addition, recurrent droughts reduced the herd sizes, and therefore the poor and very poor households may still lack a sufficient number of saleable livestock. Therefore, except households in Cherati, West Imey, Bare, Dolobay and Dolo Odo Woredas who are in Crisis (IPC Phase 3), the poor and very poor households in the remaining parts of southern and southeastern pastoral areas are currently Stressed (IPC Phase 2).

*Assumptions*

In addition to the national assumptions described above, the following assumptions have been made about the southern and southeastern pastoral and agropastoral areas:

- As a result of better livestock body condition, livestock market prices are expected to increase slightly from July to December, especially due to seasonally high demand in July/August, October, and December.
- The availability of local labor opportunities and self-employment opportunities is expected to increase and remain more available than in recent years. The expected good performance of the July to September *Karma/Karan* rainy season will have facilitated more opportunities related to the livestock sector and increasing local spending.

*Most Likely Food Security Outcomes*

Regenerated pasture and water during the March to May *Gu*/*Genna* rains are expected to be sustained during the short dry season until the *Deyr*/*Hageya* rains start in October due to their relatively good conditions. The normal October to December *Deyr*/*Hageya* rainfall anticipated will replenish water and pasture resources used during the short dry season. Therefore, water and pasture availability is anticipated to remain high through December. Accordingly, no significant declines in livestock body conditions and their productivity are anticipated. This will lead to an increase in household income from livestock and milk sales. Furthermore, the improvement in livestock productivity is expected to continue its positive contribution to the improvement of wage rates and gifts through better livestock sales income of better off households. However, these improvements, while widely spread across southern and southeastern pastoral areas, are not anticipated in Cherati, West Imey, Bare, Dolobay, and Dolo Odo Woredas, despite the normal *Deyr* rains anticipated. This is mainly due to the consecutive poor seasonal rain performance in these areas that continues to slow recovery.

On the other hand, the anticipated increase in cereal prices, mainly from July to October will continue to limit food access for poor and very poor households. Despite some increase in herd sizes compared to recent years, most herds remain smaller than they were during the Household Economy Approach (HEA) baselines' reference years, which were between 2005 and 2009. These still low herd sizes do not allow poor and very poor households to take full advantage of recently good seasonal performance as their herds are still recovering. Poor and very poor households in Cherati, West Imey, Bare, Dolobay, and Dolo Odo Woredas that will continue to be in Crisis (IPC Phase 3) through December, but households in the remaining parts of southern and southeastern pastoral areas will be Stressed (IPC Phase 2).

**Afar and northern Somali Region**

*Current Situation*

The good performance of the March to May *Gu* rains allowed maize and sorghum planted in April in Fafan Zone to perform well, and most of these crops are currently at the flowering stage. Similarly, some agropastoralists found along the Awash River in Asaita, Afambo, Dubti, and Amibara Woredas have fresh harvest from their irrigated land. However, except for some harvest obtained from small, irrigated farms in Erer and Barak areas of Sitti Zone, well below average crop production was reported in the remaining agropastoral areas in Sitti Zone. In addition, despite total March to May *Sugum* rains this year being better than in recent years, crop performance is reported to be poor in most agropastoral parts of Afar Region due to both flooding and moisture stress.

Following below average total March to May *Gu*/*Sugum* rainfall in some areas, rangeland resources in some parts of Afar and Sitti Zone of Somali Region are deteriorating. Pasture and water in these areas was exhausted earlier than usual, which forced early livestock migration to neighboring areas within and outside of the region. Accordingly, livestock from Kori, Elidar, and Mille Woredas in Awusi Zone, Berhale, Aba'ala, Erebti, and Afdera Woredas in Kilbati Zone, and Awra, Gulina, Yallo, and Ewa Woredas in Fanti Zone in Afar Region migrated to adjacent highland areas of Amhara and Tigray or to other parts of Afar. Similarly, livestock outmigration has been observed from Sitti Zone in northern Somali Region to Tulli-Guled, Chinakson, Afar, and Oromia. This has caused resource-based conflict among clans along the borders between Somali, Afar, and Oromia Regions. Livestock body conditions in northern parts of Afar Region and Sitti Zone, mainly of cattle and sheep, are deteriorating. However, a reduced number of lactating animals due to poor pasture and water availability has reduced milk availability in northern parts of Afar and Sitti Zone. On the other hand, pasture, browse, and water availability in Fafan Zone are relatively better as a result of better *Gu* rains. Moreover, livestock body conditions, milk production and availability, and livestock productivity are all mostly seasonally normal in this zone.

Cereal and livestock prices have shown mixed trends. In June, a medium size goat's or sheep's price in Mille, Elidar, Kori, Berhale, Awra, and Gewane Woredas in Awusi Zone and Kilbati, Gabi, Fenti, and Khari Zones of Afar Region increased between 120 to 133 percent since last year. However in Agroba Special Woreda and Sumurobi Woreda, these prices declined between 20 and 30 percent over the same time period. Cereal prices increased between 110 and 130 percent between June 2012 and June 2013 in Afar Region, but c in Asaita, Dubti, and Afambo Woredas, cereal prices declined over the same period due to the local green harvest this year around the end of the *Sugum* rains.

March to May *Sugum*/*Gu* rains in Afar and northern parts of Somali Regions were higher in terms of rainfall than recent years, but livestock production and productivity are still impacted from previous years' droughts. The recently conducted emergency need assessment found herd sizes remain below baseline levels recorded from 2005 to 2009 across all zones in Afar Region. As a result, poor and very poor households still face difficulties accessing food. While poor and very poor households in southern parts of Afar and Fafan Zone are currently Stressed (IPC Phase 2), households in the remaining parts of Afar and Sitti Zone of Somali Region are in Crisis (IPC Phase 3).

### *Assumptions*

In addition to the national assumptions described above, the following assumptions have been made about Afar and northern Somali Region:

- As a result of better livestock body condition, livestock market prices are expected to increase slightly from July to December, especially due to seasonally high demand in July/August, October, and December.
- The availability of local labor opportunities and self-employment opportunities is expected to increase and remain more available than in recent years. The good performance of the March to May *Gu*/*Genna* rainy season as well as the anticipated normal *Deyr*/*Hageya* rains will have facilitated more opportunities related to the livestock sector and increasing local spending.

### *Most Likely Food Security Outcomes*

Most parts of Afar and northern part of Somali are expected to receive normal to above normal rains during their longest rainy season (*Karma*/*Karen*) from July into September. This is expected to improve the availability of pasture, water, and browse, reinforcing recent improvements in livestock body conditions and productivity. However, northern parts of Afar and most parts of Sitti Zone in Somali Region have had more than three poor rainy seasons since 2011, which has eroded household asset holdings. Even with some recovery of livestock during the season and additional conceptions, households will not fully recover their previous purchase power from before the shocks. These groups increasingly depend more on social support and self-employment. In addition to the smaller herd size that limits their access to milk and to income from sales of livestock and livestock products, high cereal prices continue to limit food access.

Therefore, due to the cumulative impacts of the successive poor seasons, poor and very poor households in northeastern part of Afar and most parts of Sitti zone in Somali Region will remain in Crisis (IPC Phase 3) through at least December. Poor and very poor households in the remaining parts of Afar and northern Somali are expected to have minimally adequate food consumption due to the relatively better performance of *Gu/Sugum* rains and the anticipated normal to above normal *Karma*/*Karan* rains. They will be Stressed (IPC Phase 2) from July until at least December.

**Major sweet potato-growing zones and dominantly *Belg*-producing southern woredas of SNNPR**

*Current Situation*

The cumulative February to May *Belg* 2013 seasonal rainfall was rated average to above average in most part of SNNPR. The rainfall was well distributed over space and time in the western areas of SNNPR. However, in the northern, central, and eastern areas particularly the lowlands of Gamo Gofa, Sidama, Wolayita, Guraghe, Selti, South Omo, and Segen Zones and Alaba Special Woreda, the rains started two to three weeks late, had an uneven distribution over space and time, and withdrew early. Following a relatively drier period in May and first week of June, the *Kiremt* rains had a timely started around mid-June, and they have continued with normal to above normal total rainfall across the region.

As a result of average to above average *Belg* rainfall, overall *Belg* crop conditions this year are estimated to be good, resulting in near average production estimates at the regional level. Consumption of green maize and haricot beans started in late June in some areas where the onset of the *Belg* rains was relatively earlier and with heavier rain. However, dry spells during the season led to moisture stress, flooding in some areas, an armyworm infestation, and landslides have all caused significant crop damage, contributing to expectations for below average production in some pocket areas. Maize is the most affected crops by these localized hazards. For instance, flooding, overflow of rivers, and localized land slide incidences damaged crops on nearly 26,000 hectares (ha) of land in different parts of Wolayita and Gamo Gofa Zones. In addition, armyworm infestation affected fields and grazing lands of around 19,000 ha in Wolayita, Gamo Gofa, and Kambata Tambaro Zones. Since control measures for armyworms have been inadequate for the scale of the infestation, crop losses to armyworms are likely to be significant. Though there were not a comprehensive assessment done to quantify the production losses due to armyworm infestation, the preliminary field report indicate that up to a tenth of crops, mainly maize from the infested field are damaged and likely lost. Using the start of *Kiremt* rains since mid-June 2013, *Meher*-growing areas in Guraghe, Alaba, Selti and other areas with bimodal cropping have started land preparation and the planting of short-cycle *Meher* crops such as wheat, barley, beans, peas, and teff, following their normal patterns in terms of timing.

Pasture and water regenerated with the rains, and they are currently available at a favorable rate. Livestock body conditions are generally average in most parts of the region. There have not been large-scale livestock disease outbreaks, but trypanosomiasis continues to spread in most lowland areas of Wolayita and Gamo Gofa Zones. Calving rates as well as the milk yield improved during the *Belg* rains.

Cereal prices in June were higher than last year in most markets. For example, the June price of maize in Sodo in Wolayita Zone was 22, 10, 25, and 28 percent higher than May, last year, two years ago, and the five-year average, respectively. These increases are mainly associated with the reduction in supply following the below average 2012 *Meher* harvest in the region and with the increased demand as households use market purchases to replace poor, own crop production. Vegetables, root crops like taro and cassava, and butter prices had all started to decline by June due to improved livestock productivity and the start of the *Belg* harvest. Coffee prices remain low compared to last year due, at least in part, to the decline in international coffee prices.

There is not been a widespread human disease outbreak reported, but with wet conditions the number of malaria cases has increased in most lowland areas. The number of children admitted to Outreach Therapeutic Programs (OTP) in June declined compared to last year. However, a considerable number of acutely malnourished children, pregnant women, and/or lactating women were found during the Community Health Day (CHD) campaign conducted in many parts of the region, particularly in some areas of Alaba, Silte, and Guraghe.

Following the below average crop production from last year *Meher* harvest, households have found additional sources of food and income such as increasing casual labor, increased sales of firewood , charcoal, and grass, entering into petty trading. This year's better agricultural performance has increased demand for agricultural labor, contributing to increased income from labor, a key income source for poor and very poor households. In addition to these income sources, the availability of vegetables and green consumption of the *Belg* crops along with timely and regular transfers of the 20 percent contingency fund of the Productive Safety Nets Program's (PSNP) resources have improved the food access and availability in much of the region. Therefore, the majority of poor and very poor households in SNNPR are estimated to be Stressed (IPC Phase 2). However, the poor and very poor households in some parts of Alaba, Silte, and Guraghe are in Crisis (IPC Phase 3) as they are having far less current *Belg* production to provide both food and demand for agricultural labor.

*Assumptions*

In addition to the national assumptions described above, the following assumptions have been made about SNNPR:

- The ongoing *Belg* harvest is expected to stabilize grain prices in SNNPR in July and August with them remaining fairly stable through December. Livestock prices are expected to increase following their normal, seasonal trend from September through December.
- With anticipation of normal to above normal total June to September *Kiremt* rainfall, flooding, hailstorms, and waterlogging are all likely to occur in few pocket areas with limited impacts at the regional scale, but with severe impacts on the affected households.

*Most Likely Food Security Outcomes*

The June to September *Kiremt* 2013 rains started on time around the end of June and are likely to continue following normal patterns in terms of amount, distribution, and the timing of cessation. This will favor long-cycle crops, short-cycle *Meher* crops, and perennial crops, including coffee in Sidama and Gedio. Pasture and water availability are likely to continue to be normal. This will improve or maintain average to good livestock body conditions and productivity, which primarily benefits middle income and better-off households. Poor and very poor households are less likely as their livestock holdings are minimal.

Significant improvement in agricultural labor opportunities expected in the scenario period due to the anticipated normal agricultural activities. Coffee production is performing normally, having flowered in March and April and with a good second flowering expected with continued *Kiremt* rains. Coffee berry disease has also been reported to be less than last year. With likely to average to good production, coffee labor opportunities and associated wages rate are likely to be much better than last year. Increased income with stable cereal prices should maintain food access in many areas.

Despite below average *Belg* crop production expected due to localized hazards in a few places, the harvest obtained is improving food availability at the regional level and allowing households to access food. *Meher* crop production, starting with the green harvest in September and continuing with the dry harvest in November and December will continue to improve access to food for most poor and very poor households in the region between now and December. Similarly, the income-generating opportunities in the scenario period will allow many households to supplement or to meet their food needs through market purchases. However, poor and very poor households only cover a little over half of their consumption from their own production. While prices are likely to be stable, they have risen substantially, so some households will not be able to address their essential non-food needs. Poor and very poor households are likely to remain Stressed (IPC Phase 2) through December 2013. However, the poor and very poor households in Alaba, Silte, and Guraghe are likely to remain in Crisis (IPC Phase3) from July through September and then improve to Stressed (IPC Phase2) from October through December, following the start of the green *Meher* harvest.

**Eastern marginal *Meher*-producing areas**

*Current Situation*

According to the recently completed *Belg* 2013 multiagency seasonal assessment, compared to normal and last year, the overall *Belg* performance this year was very poor in northeastern parts of Amhara and Tigray Regions due to the delay in the onset of the rains, the low amount of total rainfall, and the erratic rainfall distribution across time and space. For instance, estimates obtained from the multiagency assessment reveals that total *Belg* crop production in South Wollo and North Wollo Zones may be only about 7 percent and 10 percent of the five-year average, respectively. Similarly, the *Belg* contributes to about 20 percent of the annual crop production in North Shewa Zone in Oromia Region, but this year very few *Belg* crops are likely to be harvested. Despite the delay in the onset of *Belg* rains by about one month in March instead of in February, total *Belg* rainfall and rainfall distribution was relatively better in East and West Hararghe Zones in Oromia Region. However, a dry spell in May and June resulted in a reduction in crop growth. The situation has been worse in the lowlands of East and West Hararghe where many of the planted crops on the field are reported to have wilted and some crops have already been turned over to livestock for grazing.

In general, the start of the *Kiremt* rain in June in the eastern, marginal, *Meher*-producing areas was near normal in terms of timing and rainfall totals have been mostly normal to above normal. Currently, land preparation is completed in most areas, and the planting of maize, sorghum, wheat, and barley is underway. For instance, households in West Hararghe had completed 75 percent of their normal planted area coverage. Those crops are currently are at the vegetative stage. Moreover, the weather condition was mostly dry until mid-July in the northeastern lowlands of Amhara and Tigray Regions, which forced dry planting of sorghum hoping to have persistent rains as of mid-July.

A fodder and forage shortage in the *Belg*-producing areas of the northeastern parts of Amhara and Tigray Regions has increased. Households are purchasing fodder and feeding their livestock, although this is a competing demand for households' cash needs for food purchase in these area. In highland, *Belg*-producing parts of Amhara, sheep and horses have been the most affected livestock species. The feed shortage has reportedly led to deaths for a significant number of different types livestock species according to woreda officials. Desssie Zuria and Delanta Woredas reported about 5,000 and 2,000 livestock deaths since March, respectively, mainly related to the feed shortage.

Prices and supply for staple food are behaving normally, following the seasonal pattern. Accordingly, staple food prices increased from March to June as supplies from previous harvests declined and the lean season approached. Maize and sorghum have been affected the most by the price rises. In addition, the barley supply in Amhara's *Belg*- producing areas is lower than usual due to the poor *Belg* season production so far, so households are purchasing sorghum and maize, which both typically and this year has a higher price. On the other hand, the maize price has declined, marginally, in some markets in East and West Hararghe Zones due to the availability of green maize from the ongoing *Belg* harvest. Pulse prices in Amhara and Tigray Regions have declined around 30 percent since last year, attributed to an export ban. With the exception of the *Belg*- producing highlands in Amhara Region where sheep prices have declined since January, possibly due to poor body conditions, livestock prices are generally above last year and continued to rise from May to June.

There are no extreme human disease outbreaks reported in eastern, marginal, *Meher*-producing areas. Following the usual trend, the number of acutely malnourished children admitted to OTPs seasonally increase in May, after declining for a couple of months since January. However, the sharp increase of OTP numbers from April to May is a bit more than would be seasonally expected. For instance, compared to April, the OTP admission in May has increased 45 percent from April to May in South Wollo Zone.

With very far below average *Belg* production in northeastern Amhara and Tigray Regions and North Shewa Zone in Oromia. additional household members are increasingly seeking labor opportunities. This is the primary coping strategy mentioned by a number of poor and very poor households. High food prices and limited ability to increase income from labor and livestock sales, leave many households unable to purchase sufficient quantities of food. Thus poor and very poor households in many places of central, eastern and southern Tigray; northeastern parts of Amhara and the midlands and highlands of East and West Hararghe zones and *Belg* producing areas of North Shewa Zone in Oromia Region are currently in Crisis (IPC Phase 3).

### *Assumptions*

In addition to the national assumptions described above, the following assumption has been made about eastern, marginal, *Meher*-producing areas:

- Both local agricultural and migratory labor opportunities are likely to be available at a seasonally normal level with high demand for labor both in July and August for planting and weeding and in November and December for harvesting *Meher* crops.

### *Most Likely Food Security Outcomes*

The average to above average amount and mostly normal distribution of *Kiremt* rain is expected to allow continued normal timing of *Meher* crop planting and normal growth. Ultimately, it is expected to result in near average *Meher* crop production. Eastern and Southern Tigray have thus far received average to above average *Kiremt* rainfall. The rain in most of Amhara has been normal, though long-cycle crop production may have been compromised by longer than usual

May/June dry spell in the northeastern lowlands. There also has been somewhat erratically distributed *Kiremt* rains in localized areas in North and South Gondar and Waghemra Zones of Amhara. *Belg*-dominant areas of Amhara are not likely to plant much during the *Kiremt* as most of their lands are not suitable for *Meher* crops. Most areas in Oromia Region are also expected to receive average to above average total *Kiremt* rains, and it has been exceptionally above average and well distributed in central Oromia Region. Thus, an average *Meher* crop production is anticipated in many parts of the eastern, marginal, *Meher*-producing areas.

Livestock body conditions are likely to be average to good, and livestock sales are expected to increase cash incomes between now and December. Labor demand will continue to be normal and continue to generate cash income that improves the purchasing power of households. However, despite a good progression of *Kiremt* rains from July to September, in many places the *Meher* harvest is expected to commence only in October. Thus many food insecure areas of Amhara and Tigray, parts of North Shewa Zone, and midlands and highlands in East and West Hararghe Zones in Oromia Region are likely to remain in Crisis (IPC Phase 3) until the start of the *Meher* harvest. Therefore, with the exception of *Belg*-dominant areas which will remain under Crisis (IPC Phase 3), the poor and very poor households in the remaining areas will be able to increase their food consumption by October, and therefore they will Stressed (IPC Phase 2) from October to at least December.

## EVENTS THAT MIGHT CHANGE THE OUTLOOK

**Table 1:** Possible events over the next six months that could change the most-likely scenario.

| Area | Event | Impact on food security outcomes |
|---|---|---|
| *Meher*-producing areas | Poor performance of the June to September *Kiremt* rains | Poor performance or early cessation of the *Kiremt* rains would affect the total *Meher* production. This may contribute to food prices increasing further. High prices could prevent better-off households from hiring additional labor during the harvest, decreasing income and own-produced food in *Meher*- producing areas. |
| Pastoral areas | Livestock disease outbreaks | The improvement in animal body condition and their productivity would be affected. Reduced milk from lactating animals and reduced income from livestock sales would likely follow. |
| Nationwide | Delays in humanitarian assistance | An increase in the rate of malnutrition |
| SNNPR | Further decline in international coffee prices | A further decline in international coffee prices could lead to lower wages for workers in coffee in Sidama and Gedio Zones in SNNPR. |

## ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.