

## HIGHLIGHTS

### Rainfall Performance Mixed

In October and early November, rainfall was unseasonably heavy in the north and west, while in the southern rangelands, rains appear to have ended about one month early.

### Poor rainfall threatens pastoralists

Unless rainfall improves during November, pasture and water conditions – especially in zones along Ethiopia's border with Somalia – may be insufficient to meet livestock and human needs until the next rainy season in April 2001.

### Seasonal Production and Food Needs Assessment Begins

The *mehar* crop production and food needs assessment is scheduled to begin in late November. The results of the assessment will form the basis of the food need of the country for CY 2001.

### Maize Prices Decline

Maize prices have dropped significantly from their extremely high levels in May and are now below average.



## ETHIOPIA FOOD SECURITY UPDATE

November 10, 2000

### **\*Pastoral Regions Watch\***

During late October and early November, poor rainfall distribution in Somali Region, particularly in the zones of Afder, Southern Gode and Warder, along Ethiopia's border with Somalia, threatens the food security of pastoralists. Analysis of daily satellite imagery of weather systems indicates that the important short-rains have ended nearly one month early. However, successive waves of cold fronts crossing the country in early November were expected to have yielded some rainfall. A joint food needs assessment to the region will take place in late November to determine whether the availability of pasture and water is sufficient. Over one million people are currently receiving food aid in Somali Region as a result of livestock deaths due to drought earlier this year.

### **Background to the Current Season**

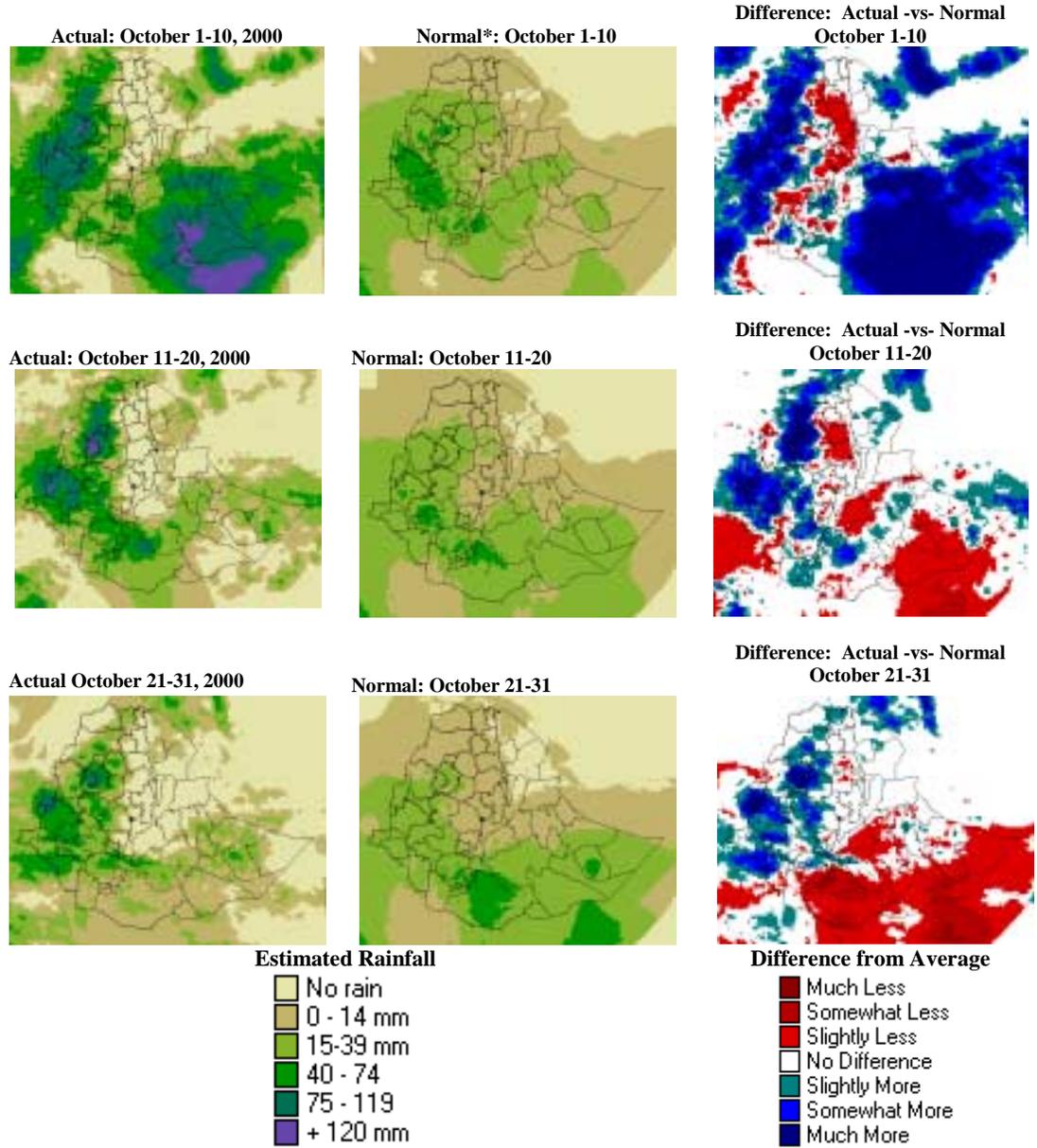
**The Harvest Season:** October to December marks the *mehar* harvest season in Ethiopia. Following the seasonal rainfall pattern, harvesting generally begins in the north and proceeds across the country to the south and southwest where crops normally reach maturity at the end of the year. Short-cycle crops, such as teff and pulses, are harvested first followed by long-cycle crops, like maize and sorghum.

The harvest season is normally dry, characterized by cold nights and warm and bright days. In some years, nighttime temperatures in highland areas drop so low that frost damage to maturing crops reduces yields. Rainfall can also be a problem during the harvest period, as it can knock fragile teff grains off the stalks and damage other cereals, making them unfit for human consumption.

**Pastoral Region Rains:** While most of the country is entering the dry season and harvest period, October to December normally brings short-season rains to the livestock-dependent southern and southeastern lowlands of the country. These rains are critically important to the livelihoods of pastoralists, as they recharge water sources and replenish pasture and thus sustain livestock through the dry-season from December to April. Historically, the failure of these rains has contributed to the death of large numbers of livestock and mass movement of people in search of grazing and water. In recent years, successive droughts have significantly reduced livestock populations, especially in Borena Zone and Somali Region, and made the livestock-dependent population extremely vulnerable to poor food access.

**FIGURE 1: DEKADAL RAINFALL ESTIMATES FOR SEPTEMBER 2000**  
Based on NOAA Satellite Imagery

*Good rains during the first 10 days of October gave way to poor rainfall distribution during the rest of the month. The southeast pastoral zones, especially Somali Region, is unseasonably dry.*



\*Normal based on a calculation of the 5 year mean (1995-1999)

## Factors Affecting Food Availability

**Summary:** Rains in the livestock-dependent south and southeastern lowlands appear to have ended earlier than normal. However, cold fronts passing over the country in early November were expected to yield some rainfall. If rainfall is not well distributed in November, access to pasture and water may not be sufficient to sustain livestock herds until the long-rains begin in April 2001. Measures may be needed to avert a potential food crisis.

Most crop dependent areas received sufficient rainfall for crop development during the rainy season. Harvesting has begun and will continue through December. Unusual rainfall in early November may damage cereal grains that have not yet been harvested. The impact of late rains on crop production will be assessed in November and December.

**Current Rains:** During October 2000, the weather was unseasonably wet over much of the northern, northwestern and western parts of the country (Figure 1). In the southern pastoral areas, rainfall was well distributed over the first ten days of October, with unusually heavy rains occurring in some locations of Somali Region. The town of Gode, for example, received over 71 mm of rainfall during one storm in early October – nearly half the amount of precipitation the area receives during the entire short rainy season.

Since October 11, rainfall distribution in the southern pastoral areas – especially along Ethiopia's border with Somalia diminished greatly and was much below normal. Rainfall in the rest of the country was well distributed. The west, northwest and central part of the country received much above average rainfall during the month.

Unseasonably heavy rains in the west and northwest and unusually dry conditions in the south are the result of two different climatic factors. The first, causing the unusual rainfall in the west and northwest, is the result of the weakness of the seasonal high-pressure system over North Africa, which has allowed northern hemisphere systems to move across the continent and extend into Ethiopia. The second climate factor creating unusually dry conditions over the southern pastoral areas is the result of the weakness of the Inter-Tropical Convergence Zone (ITCZ). Normally the ITCZ pulls moisture from the Indian Ocean into southern Ethiopia during October and November. This year, the convergence of northern and southern hemispheric winds that forms the ITCZ moved south and west into Kenya and Sudan earlier than normal, causing the sudden reduction in rainfall over the southern half of the country.

**Impact of the Rains in the Pastoral Areas:** For the pastoral areas of southern and southeastern regions, including most of the Somali Region, Borena Zone of Oromiya Region and South Omo Zone of the SNNPR, the rains began on time but weakened during the end of October 2000. The continuation of these rains through November is extremely important to sustain the livelihoods of the pastoralists living there as these short rains recharge water sources and replenish pasture. Analysis of daily satellite pictures of weather systems indicates that, while normal seasonal weather systems have retreated, there are successive waves of cold fronts passing over the country from the northwest.

*This year the convergence of northern and southern hemisphere winds, comprising the ITCZ, moved south and west into Kenya and Sudan earlier than normal, causing a sudden reduction in rainfall over the southern half of the country.*

*Analysis of daily satellite pictures of weather systems indicates that, while normal seasonal weather systems have retreated, there are successive waves of cold fronts approaching the country from the northeast, and these may yield rainfall over the pastoral areas.*

These events may yield rainfall over the pastoral areas. Keeping an eye on weather systems in November, the Government of Ethiopia (GoE) and donors should consider specific actions to avoid a food crisis in the pastoral areas if rainfall should fail. FEWS Net and USAID staff, along with GoE and donor counterparts, will assess food needs in these areas during the last 10 days of November.

**Impact of the Rains over the Crop Dependent Areas:** In the northern crop dependent areas of the country, crops were planted late due to late onset of rain for the season. Fortunately, unseasonable rains in October helped sustain the crop through maturity. Most cereal crops should have normal yields. The late rains, however, may have damaged pulses and teff crops. The damage is feared to have increased in some localities, the extent of which is to be assessed in November to December.

In the crop dependent southern areas, including North Omo Zone, and the special weredas of Konso, Derashe and Burji of the SNNPR, the rains were seasonable and have fostered the development of short cycle cereals, pulses and potatoes. More rain is needed in November to allow the crops to reach maturity and produce normal yields.

## Crop Production and Need Assessment

**Summary:** The seasonal crop production and food needs assessment is scheduled to begin in late November. The Ethiopian Government's Disaster Preparedness and Prevention Commission (DPPC) and donors have been working to improve the assessment methodology. This year more than 20 teams are scheduled to spend three weeks in the field to assess food availability, access and food needs. Their findings will form the basis of the food need of the country for CY 2001.

**Assessment Methodology:** A review of last year's assessment methodology by the Disaster Prevention and Preparedness Commission (DPPC) and donors recommended improvements to better calculate food needs. To address this, members of the Early Warning Working Group (EWWG), including the DPPC, Canadian CIDA, SCF/UK, WFP/VAM, EU and USAID/FEWS Net, held many meetings to review the recommendations and develop improvements. While time constraints and differences of opinion prevented them from addressing most of the recommendations, the EWWG introduced slight modification into the methodology of computing beneficiaries. The methodology will be tested during this assessment. Further review and refinements will hopefully take place early in CY 2001 so that the method can be fully operationalized for future assessments.

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## Factors Affecting Food Access

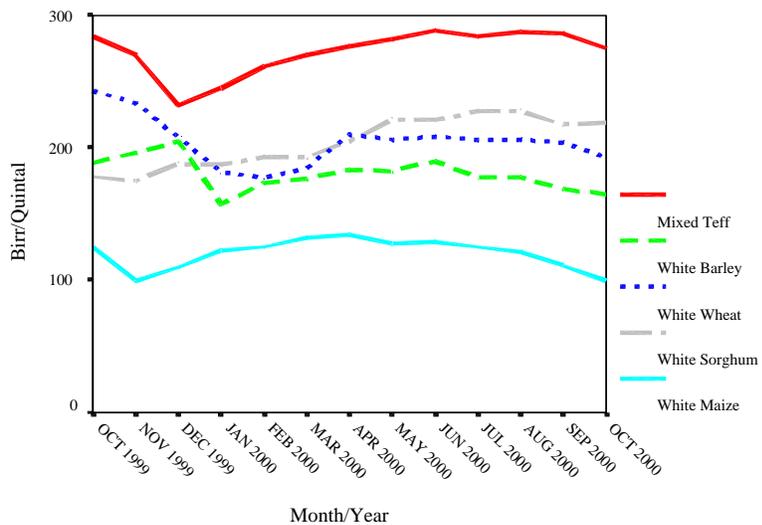
**Summary:** Cereal prices have shown a stable trend over the last nine months. As harvested crops begin to enter the market, prices have begun to decline. Deficit markets of Dessie, Dire Dawa and Mekele have shown a more than five percent decline, while cereal prices have fallen about 10 percent in the surplus

cereal markets of Shashemene, Hossana, Jimma and Nakempt. This general trend has improved market access for lower income rural and urban populations.

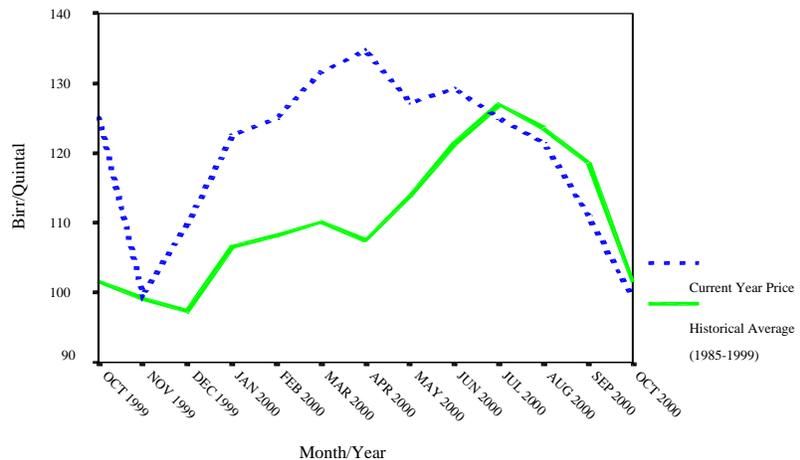
*All major cereal retail prices declined in October 2000 compared to September prices.*

**Cereal Price Trends:** Cereal prices are expected to decline with the coming harvest. In this report, emphasis is given to mixed teff, white wheat, white sorghum, white barley, and maize, because these varieties of cereals are dominant within each cereal type in terms of volume traded and consumption. All major cereal retail prices declined in October 2000 from their levels in September. These declines are attributed to recently harvested crops (such as maize, potatoes, and chickpeas) coming into the market and also to grain speculators releasing large volumes to the market in anticipation of further price declines.

**Figure 2**  
Nominal Wholesale Prices of Selected Cereals in Addis Ababa  
(Oct 1999 to Oct 2000)



**Figure 3**  
Real Wholesale Prices of White Maize in Addis Ababa:  
Oct 1999 – Oct 2000 vs Historical Monthly Average (1985 – 1999)



Significant price decreases are observed for maize – about 20 percent in surplus areas and about five percent in deficit areas. As depicted in Table 1, retail cereal prices declined in the selected representative markets of the country. Deficit markets of Dessie, Dire Dawa and Mekele have shown a more than five percent decline, while cereal prices have fallen about 10 percent in the surplus cereal markets of Shashemene, Hossana, Jimma and Nakempt.

The analysis of price trends shows that cereal prices, with the exception of maize, have shown a stable trend for the last nine months in the big terminal market of Addis Ababa (Figure 2). The Addis Ababa market is a price setter for cereals traded in most markets in the country. Mixed teff prices, which have been increasing from the beginning of the year to July, have shown a stable trend since then.

Prices in both the deficit and surplus markets indicate adequate supply with prices following a seasonal price trend. Prices had increased during the lean months of May to August, but are now relatively stable.

*Speculation and fresh harvested maize entering into the market are the main factors depressing maize prices in many parts of the country*

**Unusual price movements prevailed in all maize markets:** Maize prices declined significantly in October contrary to the usual seasonal movement for this time. Since July 2000, maize prices expressed in real terms have been less than their average (1985-99) in the Addis Ababa market (Figure 3). One factor influencing the price declines is speculation. Early in this year traders began buying up maize in the hopes of selling to donors for relief programs. As soon as the relief effort started, traders quickly realized that much of the maize being distributed as relief food was imported, not purchased locally. Since May, traders have released large amounts of maize into the market. This additional import combined with harvested maize entering the market is reducing prices.

**Table 1 - One-Month Change in Retail Prices by Market and Product (2000)**  
(Birr/Quintal\*)

Market	Mixed Teff			White Barley			White Wheat			White Sorghum			White Maize		
	Sept	Oct	% Chg	Sept	Oct	% Chg	Sept	Oct	% Chg	Sept	Oct	% Chg	Sept	Oct	% Chg
Addis Ababa	301.3	293.8	-2.5	190.0	185.0	-2.6	222.5	216.3	-2.8	230.0	232.5	1.1	133.8	122.5	-8.4
Nazrethe	228.3	224.0	-1.9	NT	NT	NT	194.0	194.8	0.4	NT	NT	NT	127.3	106.3	-16.6
Ambo	221.3	218.0	-1.5	158.8	169.8	6.9	185.8	186.8	0.5	NT	NT	NT	119.8	102.5	-14.4
Assela	231.8	234.8	1.3	176.5	165.8	-6.1	175.3	162.5	-7.3	NT	NT	NT	130.5	107.8	-17.4
Bale Robe	NT	NT	NT	NT	65.0	NT	144.0	140.8	-2.3	NT	NT	NT	NT	NT	NT
Shashemene	254.5	240.8	-5.4	199.3	189.0	-5.1	212.0	190.5	-10.1	NT	NT	NT	135.8	109.8	-19.2
Hossana	194.5	189.8	-2.4	191.5	187.3	-2.2	161.3	144.8	-10.2	NT	NT	NT	129.0	99.8	-22.7
Gonder	242.5	229.0	-5.6	214.8	204.8	-4.7	210.5	197.3	-6.3	141.8	133.5	-5.8	143.5	134.3	-6.4
Nakempt	190.0	173.8	-8.6	NT	NT	NT	NT	NT	NT	NT	NT	NT	85.0	68.8	-19.1
Jimma	229.0	218.5	-4.6	182.8	177.8	-2.7	196.8	186.8	-5.1	112.0	101.5	-9.4	105.3	84.8	-19.5
Dessie	257.3	247.0	-4.0	210.0	191.3	-8.9	211.7	191.3	-9.6	NT	NT	NT	128.3	122.5	-4.5
DireDawa	288.8	280.0	-3.0	249.3	239.3	-4.0	273.3	267.5	-2.1	265.0	257.5	-2.8	155.3	147.0	-5.3
Mekele	271.7	250.0	-8.0	245.7	220.0	-10.4	238.3	230.0	-3.5	NT	NT	NT	141.7	138.3	-2.4

Source: Based on Data from EC/LFSU, Market Information System Unit, Addis Ababa, Ethiopia.

Notes: NT = Not Traded, transaction not observed at retail level or product not available in the market.

\*1 Quintal = 100 kg.

Continued low prices may negatively impact maize producers who rely on market sales. Local purchases of maize by donors for food aid programs could help to stabilize prices. Of course, there is an obvious benefit of lower prices for poor households with limited means to access food in the market.

**SOURCES:**

Information used in this report is from local and international NGOs, U.N. Agencies and donors, the Government of Ethiopia, FEWS Net field reports and NOAA satellite imagery.

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