• Following successive seasons of below-average rains, an estimated 6.2 million people remain food insecure, mainly in the eastern half of the country, and require emergency food assistance. Four rounds of food aid distributions are planned through December, though a shortfall of about 300,000 MT of relief food is anticipated.

• Though rainfall has been improving, performance of the kiremt rains to date remains below-normal, including in parts of the western, surplus producing areas rains were late and erratic.

• Following the seasonal pattern, cereal prices have risen since June 2009. Although they are lower than in April 2008, they remain much higher than the 2004–2008 average. Hence, high prices will continue to challenge the purchasing capacity of people who rely mainly on market to meet their food needs.

Seasonal calendar and critical events

Food security overview

The number of people requiring humanitarian assistance until the end of the current year has been projected to be 6.2 million, though it is likely to further increase when the official figure, based on the belg/gu seasonal needs assessment, is released with the National Humanitarian Requirement Document. This document is expected before the end of this month. This is in addition to the 7.5 million chronically food insecure beneficiaries of the National Productive Safety Net Program.
(PSNP). Given continued resource limitations, the government and its humanitarian partners are prioritizing woredas so as to better address the revised relief needs. Criteria for the prioritization exercise included reported cases of malnutrition, proportion of population in need from the 2009 belg seasonal assessment, and previous history of food insecurity. The revised national requirements for the second half of 2009 stands at 462,500 MTs with a shortfall of 300,000 MTs. Over the remainder of 2009, four rounds of food aid allocations are expected to be done.

For the past five years both the Kiremt rains and meher production have been generally normal, especially in the western surplus-producing parts of the country. Therefore, despite the abnormally high food and non-food prices over the last couple of years, the food security situation in these areas has remained stable. In the eastern half of the country, however, high and extreme levels of food insecurity persist due to consecutive below-average seasonal rains which have resulted in poor production during the 2008 and 2009 belg/gu seasons and the 2008 meher season. As the current hunger season (June to September) progresses, food insecurity continues to affect vulnerable populations in these parts of the country, including the northeastern highlands of Amhara, Southern Tigray, Afar, eastern parts of Oromia, and most parts of Southern Nations, Nationalities and People’s (SNNP) Regions.

In many woredas of East and West Hararghe zones in Oromia region, malnutrition among children under five is prevalent, with increased admission to Outpatient Therapeutic Programs (OTPs) and Stabilization Centers (SCs). Scarcity of pasture is reported in many lowland woredas of these zones, as well as in low-lying areas of Bale. In East and West Hararghe, distress sale of livestock and migration, increased firewood and charcoal collections, begging, and increased labor supply are also being reported. The monthly food and livelihoods security update released by CARE Ethiopia revealed that water and pasture are scarce in most woredas of Borena due to the below normal 2009 genna (April-June) rains. An influx of livestock from the drought-hit areas of northern Kenya into areas with relatively better availability of pasture in Borena zone continues, there is a growing concern over early depletion of pastoral resources and possible transmission of livestock diseases. Estimates on the number of livestock that have crossed into the country range from 95,000 to 200,000.

High levels of food insecurity continue in the belg-dependent areas of Amhara region as a result of a 75 percent loss of belg harvest this year, which exposed already affected very poor and poor households to acute food crisis. Monitoring reports indicate that cases of acute malnutrition are widespread in some woredas including Dessie Zuria and Legambo of South Wollo, and Meket, Kobbo, and Gidan of North Wollo zones. Given the poor 2008 meher harvest and the progressing hunger season, the levels of food insecurity are equally alarming in many woredas of Wag Hamra, and in meher producing woredas of North and South Wollo, South Gonder, and Oromia zones of the region. These areas include Sekota, Gazgibla, Dahena, Ziquala, and Abergelle woredas of Wag Hamra, Werebabo, Argoba, and Legehida of South Wollo, and Wadla and Gubalafto of North Wollo. A serious shortage of pasture is also reported in the lowlands of Minjar Shenkora woreda of North Shewa and in Wag Hamra.

In the southern and eastern parts of Tigray region, high levels of food insecurity continue among vulnerable households despite relief food and PSNP resource distributions since the beginning of the year. Results of a rapid food security assessment carried out by a regional team projects increased humanitarian assistance needs through October 2009. These include people facing acute food insecurity due to 2009 belg production failure, below normal production of 2008 meher, Internally Displaced Populations (IDPs), and more than one million PSNP beneficiaries. According to field information, the affected populations have few options for coping with the current food insecurity. The sale of livestock is constrained by poor livestock body condition and low demand and local agricultural labor opportunities have considerably decreased.

Food insecurity remains high in most parts of SNNPR, particularly in South Omo and in the Southern Special Woredas Lowland Cereal Livelihood Zone which is comprised of Konso, Burji, Amaro and parts of Derashi Special Woredas. In these areas, the 2009 belg harvest has been a complete failure. Belg is the most significant production season for this livelihood zone, accounting for 70 to 80 percent of total cereal and pulse production. The food security situation of the affected populations could improve slightly in all areas if some late belg harvests are obtained in September/October 2009. This would require that the rains perform well in the remainder of the season and extend beyond their normal cessation period in September. However, a significant reduction in production is expected in most of these areas. Pasture and water shortages are critical in South Omo zone, Mirab Abaya, Dalocha, Humbo and in all the special woredas. Early migration has started in South Omo as a result of the severity of the problem. People have started feeding their animals in the national
The repeated groups, movement problems and Famine Early Warning Systems Network and World Food Programme

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park while their travel to areas bordering to Kenya is causing conflicts over water and pasture resources. High levels of acute malnutrition have been reported in most of the zones in the region.

The absence of green maize during June and July has created food gaps across the region of Gambella, with the exception of a few woredas, such as Godere. Maize, which had been planted in March, wilted while at the flowering and seed filling stage due to a long dry spell in June and July. Security problems due to internal clan conflicts, cattle raiding by the Murel clan from Sudan, and the pressure on food supplies due to the presence of IDPs have increased the level of food insecurity in the region. As per the recent rapid emergency assessment carried out by a multi agency team, the number of people requiring immediate humanitarian assistance for about seven months starting from August is likely to increase. The food security situation in Benshangul-gumuz is stable except for conflict-induced (with neighboring Oromos) food insecurity problems in one of the woredas.

The current karma/kiremt rains in Afar region have been inadequate in terms of amount and distribution, though water and browse availability have improved in some areas. Pasture regeneration is slow due to the cumulative effects of the last three poor seasons. Slow pasture growth, in turn extends the time needed for livestock, especially cattle, to recover. Shortages of pasture are critical in northern and northeastern parts of the region. Drought related livestock deaths have been reported in Abaala and Semu Robe woredas while Kori and Bidu are among the woredas reported with serious food security problems. The region will not get rains before March as the long dry season starts in September. According to the Afar National Regional Disaster Prevention and Food Security Bureau, the last food aid distribution has been done in April while the PSNP food rations for the months of May and June are currently being transported to distribution points.

Repeated poor seasonal rains compounded by the late start of the current karan/kiremt rains in Jijiga and Shinile zones of Somali region, has left poor households highly food insecure. Pasture and water availability has also been significantly affected due to repeated poor rainy seasons. This has led to deaths of livestock and very poor availability of milk. Similarly, in the remaining seven zones of the region which receive deyr rains, extreme levels of food insecurity persist due to successive poor rains (and the associated deterioration of water and pasture availability), failure of crop production in the agro-pastoral and riverine areas, poor livestock body condition and shortage of milk availability, and ongoing trade and movement restriction in parts of these areas. Escalated cereals prices and reduced demand for livestock keeps the terms of trade unfavorable for pastoral and agropastoral populations in the region. Increased sales of livestock, across all wealth groups, and firewood collection are the major coping strategies being reported. According to the gu assessment results, in Afder zone for instance, water trucking is urgently needed in 18 kebeles (the lowest administrative unit) while another 25 kebeles are expected to face critical water shortage in the weeks to come. According ot UN OCHA, critical water shortages also prevail in Warder, Gode, Shinille and Degehabur zones and regional authorities and humanitarian partners are appealing for resumption of water tanker interventions to avert a further deterioration of the situation.

Water trucking has already began in parts of Adfem, Erer and Miesso woredas of Shinille zone. The situation is likely to get worse as the current dry season (hagaa) progresses. Malnutrition is a potential threat among children under five, pregnant and lactating mothers, and other vulnerable populations given the early start of livestock migration and existing shortages of milk for household consumption. Despite the fact that a normal deyr rains are forecasted, improvements in the food security situation are not expected in the short-term as pastoral livelihood recovery requires two to three consecutive good seasons.

In the affected areas of the country, relief food distributions (cereals, oil and pulses) and supplementary food distributions (for children, pregnant and lactating women and other vulnerable people) are ongoing. Since January 2009, three to four rounds of food rations have been distributed in all regions of the country while one additional round has been delivered to Somali region. In addition, a blanket supplementary food distribution has been conducted for more than 100,000 under five children and pregnant and lactating women in Degehabour, Degehamedo, Gunagode, Boh, Geladin and Warder woredas of Somali region. Across the country, targeted nutrition interventions are being provided through government led OTPs with the support of UNICEF and NGOs mainly in priority one woredas. However, increased food aid distributions, the extension of PSNP resource transfers for two to three months (they normally end in June), improvement in the management of OTPs, and better linkages between OTPs and Supplementary Food Programs (SFP), provision of discharge rations, and general ration distributions to prevent relapsing cases of malnutrition, will be critical to mitigate the emerging food insecurity. Most importantly, comprehensive contingency planning remains crucial given the poor 2009 meher production prospects in the months to come.
Seasonal progress

The June to September kiremt/karan/karma rains are the main seasonal rains for most parts of the country, except southern and southeastern Somali Region, neighboring lowlands of Oromia, and the southern tips of SNNPR, which are normally dry at this time around.

The current rains had an irregular start with an average of two to three weeks of delay compared to normal. Once they began, the spatial and temporal distributions were poor for the first few weeks though there was a slight improvement in the third dekad of July. The situation in the following dekad, first ten days of August has been rather worrying as most parts of the country received below normal rains. While central parts of the country has received moderate to heavy rains, nearly the whole of Gambella and southern SNNPR have received persistently poor rains in the last few weeks. Moreover, the rains have been inadequate and erratic in parts of Tigray (Raya Azebo, Alamata and Erib woredas); most of Afar; parts of eastern Amhara (Kobo, Habru, Abergale, Ziquala, Sehala, Minjar Shenkora and Kewot woredas); and the lowlands of East and West Hararghe zones in Oromia.

The late start of the kiremt rains has significantly delayed planting of meher crops such as wheat, barley, peas, beans and flax which are normally planted in June. (Figure 2) Consequently, most short-maturing meher crops are either in early vegetative or growth stages, considerably behind their normal phonological stages. Teff, however, is generally being sown on time. The fact that several meher crops have been planted late signifies that most crops are unlikely to reach full maturity unless the rains extend well beyond their normal cessation period in September.

The prospects for long cycle maize and sorghum crops, which constitute about 50 percent of the total national cereal production, is not promising in many areas of the country due to poor 2009 belg/gu rains (February to May) and the current late and inadequate kiremt rains received so far (Figure 3). In some areas, these crops have either not been planted at all or have completely failed because of inadequate belg/gu rains in the first half of the year. In an effort to minimize production losses, farmers are currently re-planting wheat, barley or other short-cycle crops including maize and pulses. The success of these crops will depend on how the current season performs in the remainder of the season. There are also areas where planting of short-cycle meher crops could not progress smoothly because of inadequate soil moisture. These include low-lying areas of Minjar Shenkora, Kewet, and Berehet weredas in North Shewa zone of Amhara, and lowlands of East and West Harergh, Arsi and West Arsi zones of Oromia and large parts of southern SNNPR including Konso. Total area planted so far is much below average and crops are not performing well. In SNNPR, for example, the coverage of short-cycle meher crops by the end of July was only 55 percent of the planned area.
Apart from the areas traditionally known for repeated food crises as a result of recurrent droughts, there is also growing concern about disrupted long cycle cropping in parts of West Wellega, Jimma, and West Shewa zones of Oromia region, areas which are typically major surplus producing areas. In the western woredas of Jimma, Sekoru, Omonada, Tiro Afeta and Nunu Benja for example, planting of maize has been late and due to a long dry spell farmers were forced to replant with shorter cycle teff and wheat. Below-normal 2009 meher harvest is likely as a result of reduced production of long cycle crops and a shift to short maturing low-yielding varieties. This will primarily impact food access and availability among households in the chronically food insecure parts of the country which rely on food from these areas. In Gambella Region, crops are performing poorly due to persistent moisture stresses over the last few months. Thus, maize, the most important food crop in the area, is either wilting or has already dried up. Such drought condition is quite unusual for the region that used to be among the areas in the western parts of the country with the longest rainy season and with no history of drought in recent memory.

Late planted crops are generally performing well in areas where the rains have been satisfactory so far although there are reports of crop damage by heavy rains, floods and hailstorms. Occurrences of these shocks are so far limited to a few isolated pockets in SNNPR (Deyogena and Alaba); Tigray (Ofia, Hintalo Wajirat and Adwa woredas), parts of western Oromiya (Kiltu Kara, Mene Sibu Nolle Kaba, Nego and Homa woredas), and Amhara (Legambo, Borena and Bugna woredas). Increased occurrences of hailstorms are likely as the rainy season progresses.

Although not on an epidemic level, increased prevalence of malaria is reported in many malaria prone lowlands of SNNPR and some parts of Amhara due to favorable environment created by the irregular rains. Desert locust infestation has also been reported in Kewet woreda of Amhara, Alamata and Raya Azebo of Tigray and Afar regions. Measures are being taken by the government to contain the mature swarms in the affected as well as neighboring areas under threat. Though the level of damages is not assessed and reported yet, experts agree that damages so far are not significant. According to the Desert Locust Control Organization, the infestation could pose a threat to crops in northeastern Ethiopia if the small group of uncontrolled locusts in remote parts of Afar breed and mature.

**Markets and trade**

Prices were much higher than last year and the five-year average when the year began and have remained relatively stable until April. Though they declined in May against the normal seasonal pattern, they started rising again in June across the country, as the June-September hunger season began. Prices are normally at their lowest after the main meher harvest in January and tend to remain low until April, starting to rise beginning in May. (Figure 4)

In Addis Ababa for example, the nominal retail price of white maize, the cereal consumed most widely by the poor, in July is 26 percent lower than same time last year and one percent higher than June 2009. Compared to the 2004-2008 average however, it is still 64 percent higher. Similarly, the nominal retail prices of white maize increased by seven percent in Bahir Dar and five percent in Mekelle compared to June prices. The slight price increase in Addis Ababa is possibly attributed to increased supplies with anticipation of the upcoming harvest and continued distribution of wheat grains through the urban subsidization program which started in March 2007. The general inflation has decreased to 29.9 percent in July comparing to 36.4 percent in June. With a similar trend, about a ten percent decrease has been reported on the food and non-food inflation rates of July from that of June due to the decreased prices of food components.

**Figure 4. Nominal Retail Prices of White Maize in Addis Ababa compared to the 2004 -2008 monthly averages and last year’s prices**

![Nominal Retail Prices of White Maize in Addis Ababa](image_url)


Notes: (1) Prices are expressed in Ethiopian birr per quintal.
(2) One quintal = 100 kg; 1 Ethiopian birr = 0.11 US cents
Prices are much lower than last year due to different measures taken by the government and the current price trends are normal following the hunger period throughout most of the country. However, they are at their highest as compared to the short term averages, which still makes access and availability of food difficult for the urban and rural poor as well as the pastoral and agro pastoral populations who highly rely on purchases.
Maize is the most widely consumed cereal by the rural poor. Sorghum is generally one of the cheapest cereals. Teff is also very important throughout the country. The most important markets for teff are the large cities including Addis Ababa, Bahir Dar, Mekele, and Dire Dawa. Addis Ababa is the capital city and Dire Dawa, Mekele, and Jijiga are major towns in the eastern, mainly food insecure, parts of the country. Bahir Dar is a major town in a surplus producing area. Jimma represents a generally food secure surplus area. Shashemene is an assembly, wholesale, and retail market and the main transshipment point for cereals from the south and southwest to the center and east. Sodo is an urban center located in the Wolayita zone, and is one of the most chronically food insecure parts of the region.