

SPECIAL REPORT

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO ETHIOPIA

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Mission Highlights

- Following a very poor secondary *belg* rainy season, the 2011 main *kiremt/meher* rains were generally timely, sufficient and well distributed in major producing areas.
- National cereal and pulse production in 2011/12 is forecast at 22.78 million tonnes, comprising 21.15 million tonnes from the peasant sector, 633 000 tonnes from commercial farms and a forecast average *belg* harvest of about one million tonnes in 2012 assuming an average production.
- Favourable rains, increased use of fertilizer and improved seeds, low impact of pests and diseases and some expansion in cultivated area have contributed to the favourable outturn.
- Throughout the country, grain prices reached record levels in September-October 2011 and started to decrease with the arrival of the new crop, but remain still well above average levels. Prices have started to display unseasonable increases since February 2012.
- Cereal import requirements in 2012 are estimated at about 835 000 tonnes of which 500 000 tonnes are anticipated to be imported commercially.
- Favorable *deyr* rains in October/December alleviated water and pasture shortages in most of Somali and southern Oromia with improved livestock body conditions, but the full recovery of the sector may need several average seasons to overcome the negative effects of the recent drought.
- An estimated 3.2 million people will require relief food assistance in the first half of 2012, with a significant decrease from 4.5 million people during the second half of 2011. Projections for the remaining part of the year will mainly depend on the outcome of the 2012 *belg* and *gu* (March to June/July) rainy seasons.
- Most affected households continue to be pastoralists and agro-pastoralists in Somali and eastern and south-eastern Oromia due to lingering impacts of the 2010/11 drought. Pockets of food insecurity are also in Afar, Amhara, Tigray, Gambella and SNNPR due to adverse weather conditions.
- Considering all food assistance programmes including relief food assistance, the Productive Safety Net programme, refugee operations, nutrition, HIV/AIDS and school feeding programmes, Ethiopia requires 929 000 tonnes cereals to meet the need of about 13.7 million beneficiaries. Out of this, 327 000 tonnes will be required for relief assistance during the first half of 2012.
- Food assistance requirements will be met through local purchases complimented by commercial imports and food aid.
- Current forecast for the 2012 *belg/gu/ganna* seasons show a high probability of below normal rainfall impacting negatively on the availability of pasture and water conditions in pastoral and agro-pastoral areas in south-eastern Ethiopia (*for every 1 million people in need of relief food assistance, additional 16 800 tonnes of cereals will be required per month*).

1. OVERVIEW

An FAO/WFP Crop and Food Security Assessment Mission visited Ethiopia from 31 October to 26 November 2011 to estimate the 2011 main *meher* season cereal and pulse production; review the 2011 secondary *belg* season harvests; forecast the 2012 *belg* season production; assess food security trends in 2011; and project food assistance requirements for the 2012 marketing year (January/December). Accompanied by experts from the Ministry of Agriculture and Rural Development (MoARD), the Central Statistics Authority (CSA) and by one observer from the Joint Research Centre of the European Commission (EC-JRC), the Mission mobilized seven teams and visited, over a period of 18 days, 62 zones and special *woredas* (districts) covering all the grain producing regions and the marginal areas.

Prior to departing to the field, the Mission was briefed on current crop production and food security situation as well as the general macroeconomic context by several national and international institutions and obtained national and regional data on precipitations, prices, inputs, trade, stocks and food assistance. National institutions visited were the MoARD (including the Early Warning and Response Directorate of the Disaster Risk Management and Food Security Sector – DRM-FSS – and the Input Marketing Division), the CSA, the Agricultural Transformation Agency (ATA), the Emergency Food Security Reserve Administration (EFSRA), the Ethiopian Grain Trade Enterprise (EGTE), the Ethiopian Seed Enterprise (ESE) and the National Bank of Ethiopia (NBE). In addition, meetings were held with the following international agencies: the Famine Early Warning System (FEWS-Net), the USAID, the International Monetary Fund (IMF), the World Bank, the Delegation of the European Commission and the International Food Policy Research Institute (IFPRI).

The Mission obtained pre-harvest planted area estimates from the annual CSA sample survey. Yield estimates for all major food crops were obtained from *woreda*, zonal and regional agricultural bureaux, which were cross-checked against information provided by farmers, traders, NGOs that were interviewed during the field trips and against remote sensing and rainfall data provided by early warning systems. Within the visited

zones and special woredas, about 250 key informant interviews were conducted, about half of them with farmers and associated with crop inspections, including crop cuttings to “spot-check” yield estimates provided by other sources. Visits to main food markets, livestock body condition scoring and continuous transect observation recording of crops and their conditions using the Pictorial Evaluation Tool (PET) were conducted. This information provided the background with which Mission teams audited data received and, where considered necessary, adjusted yield forecasts.

The food security information is based on findings of the multi-agency and multi-sector *meher* assessment conducted in November/December 2011 and a review of other secondary information sources, including market price data from EGTE and WFP as well as nutrition data provided by Government Emergency Nutrition Coordination Unit (ENCU). Information was triangulated during the debriefing sessions with the crop assessment teams and interviews with key informants, traders and members of rural communities in Oromia region. In addition, the Mission team participated in the Training of Trainer workshop for the *meher* assessment and met with one of the data collection teams in the field.

The overall performance of the 2011 *meher* season (harvest goes from October to January) crop production was generally good. Rainfall was timely, sufficient and well distributed in main cropping areas. Some delay or early cessation was reported in most areas of Tigray, eastern Amhara, south-eastern Oromia. Unexpected late rains in October and November had negative effects on maturing wheat and teff, while improved water availability and pasture in pastoral areas. After suffering two consecutive poor rainy seasons during the second half of 2010 and the first half of 2011, especially in most areas of Somali region, Borena, lowlands of Bale of Oromia and Afar, livestock conditions have generally improved following good *meher* and *deyr* rains.

Overall, the Mission estimates 2011 *meher* cereal and pulse production from peasant holdings at about 21.15 million tonnes, some 7.3 percent above 2010 production estimated by CSA. It is the eighth consecutive good *meher* harvest in Ethiopia with significant increases in production of wheat, maize and teff. When production of commercial sub-sector is added, the 2011 national *meher* production of cereals and pulses is estimated at 21.76 million tonnes from 11.4 million ha. With a *belg* harvest in July/August 2012 forecast by the Mission at about one million tonnes assuming an average production, total domestic availability of cereal and pulses for 2012 marketing year (January/December) is estimated at 22.76 million tonnes. As a result, the cereal import requirement in 2012 is estimated at about 850 000 tonnes. With commercial imports forecast at 500 000 tonnes of wheat, there is an uncovered gap of some 350 000 tonnes.

Prices of grains in Ethiopian markets have been characterized by a steady upward trend since the beginning of 2011, with record levels in October and November that had severe consequences on food access of the most vulnerable households, especially in urban areas and net buyers in rural areas. This trend is explained by a combination of factors such as monetary variables that are affecting the general economy, the low production of 2011 *belg* season, the high fuel prices that increased transport costs and the effect on food demand by cash transfers through the Productive Safety Net Programme (PSNP). Since December 2011, with the arrival of supplies from the newly harvested *meher* crops, especially maize and wheat, prices are gradually decreasing, but they still remain very high.

In 2011, number of people in need of relief assistance increased from 2.8 in January to 4.6 million during the second half of the year due to two poor rainfall seasons which affected mainly the agro-pastoral and pastoral areas in south and south-eastern Ethiopia. Early and above average *deyr* rains in October/November alleviated water and pasture shortages in Somali and southern Oromia contributing to an improvement of the overall food security situation in these regions. During the year, about 329 500 children were admitted to therapeutic feeding programmes across Ethiopia. The peak took place from May to June 2011. In December, figures were 55 percent above the January rate, partly linked to lingering impacts of the drought but also enhanced provision of nutritional services at community level.

A projected 3.2 million people will require relief food assistance in the first half of 2012. Projections for the second half of the year will depend on the outcome of the 2012 *belg/gu/ganna* (March to June/July) rainy seasons. Current forecasts point towards below average rainfall in the pastoral and agro-pastoral areas in south-eastern Ethiopia. The situation needs to be closely monitored in the coming months and figures will be updated following the *belg* assessment during the second quarter.

Considering all food assistance programmes, Ethiopia requires 928 000 tonnes of cereals to meet the need of about 13 million beneficiaries. Out of this, 327 000 tonnes will be required for relief assistance, 416 000 tonnes for the Productive Social Safety Net programme, 92 000 for refugee operations and the remaining 94 000 tonnes for nutrition, HIV/AIDS, school feeding and natural resource management programmes. Depending on the outcome of the 2012 *belg/gu/ganna* seasons, cereal requirements for the relief component

could increase during the second half of 2012 (for every 1 million beneficiaries per month 16 800 tonnes more are required).

2. SOCIO-ECONOMIC CONTEXT

2.1 Macro-economic situation

In 2011, Ethiopia was ranked 174th out of 187 countries in the UNDP human development index, with a GDP per capita adjusted with the Purchasing Power Parity of USD 971 (compared to almost USD 2 000 average for Sub-Saharan countries). After a significant contraction in 2003/04 due to a severe drought that affected agricultural production, the Ethiopian economy has experienced a broad-based and steady growth of real GDP. In general, the main determinants of the sustained economic growth are the good performance of agricultural production, with significant contribution of manufacturing and services as well as the expansion of the construction sector (mainly housing, roads and hydroelectric dams). The National Bank of Ethiopia (NBE) estimates real GDP growth in 2010/11 at about 11 percent, similar to previous five fiscal years.

According to the 2004/05 Household Income, Consumption and Expenditure (HICE) Survey by the Central Statistical Authority (CSA), poverty headcount declined from 44.2 percent in 1999/00 to 38.7 percent in 2004/05. Since then, it has likely continued to fall given the high levels of growth as well as the steady increase in Government's pro-poor expenditures and the consolidation of the Productive Safety Net Programme (PSNP). Regarding non-income poverty indicators, gains in welfare have been significant during the last ten years when the country began decentralizing basic service delivery responsibilities, first to regions and then to local governments. Significant social and human development results were delivered during the 2005/06-2009/10 Plan for Accelerated and Sustained Development to End Poverty (PASDEP). During this period, infrastructures have expanded rapidly, in particular housing and road construction. Total road length increased by 34 percent (excluding *woreda* roads) and the average time needed to reach all weather roads has decreased from 5.7 hours in 2004/05 to 3.7 hours in 2009/10. Country's hydropower generation capacity almost tripled during the PASDEP with the construction of new plants (including Tekeze, Gilgel Gibe II and Tana Belese plants). Access to potable water increased from 35 percent to 66 percent in rural areas and from 80 percent to 92 percent in urban areas. Most nutrition, education and health indicators have also shown steady improvements during last five years (see Section 5.2).

Table 1: Macro-economic indicators

	2007/08	2008/09	2009/10	2010/11
Real Sector & Prices (% change over previous year)				
Real GDP	11.6	10.1	10.6	11.4
Agriculture Value Added	7.5	6.4	7.6	8.5
Industry Value Added	10.4	9.7	12.7	13.1
Services Value Added	17.0	14	13.2	12.5
Overall inflation rate (12 months moving average)	18.4	40.6	10.8	9.4
Food inflation rate	23.6	54.1	6.4	3.4
Government Finance (% change over previous year)				
Domestic Revenue (including grants)	35.1	35.5	34.04	28.3
Tax Revenue	37.1	17.8	49.3	36.2
External Grants	30.7	45.8	-14.4	33.3
Total Expenditure	31.8	19.8	25.7	29.3
Overall Balance (incl. grants) (as % of GDP)	2.9	0.9	1.7	1.6
External Sector (% change over previous year)				
Exports	23.7	-1.2	38.3	37.1
Imports	32.9	13.4	7.0	-0.2
Average Exchange Rate Birr/USD	9.24	10.4	12.89	16.11
Reserve in months of imports	1.6	1.7	2.2	2.7
Total Exports (million USD)	1 466	14 48.0	2 003.1	2 747.1
Total Imports (million USD)	6 811	77 27.0	8 269.8	8 253.3
Total Trade Balance (million USD)	-5 345	-6 279	-6 266.7	-5 506.2
Overall Balance of Payments (million USD)	-250.9	4 35.0	685	586

Source: Ministry of Finance and Economic Development; National Bank of Ethiopia.

Rapid population growth remains a major barrier to poverty reduction. The addition of more than 2 million persons per year puts tremendous strains on Ethiopia's environment, the economy and the ability to deliver proper services. According to the latest Population and Housing Census, Ethiopia's population was 73.8 million in May 2007. Ethiopian population is still overwhelmingly rural, with 16.2 percent living in towns and only Addis Ababa, the capital, accounting for 2.7 million people (about 3.7 percent of the total population). Applying the official overall annual population growth rate of 2.58 percent, total population for mid-year 2012 has been projected by the CSA at 84.3 million.

Domestic revenue in 2010/11 (including grants) remains low as a percentage of GDP with only 18.1 percent, but it has increased by 28.3 percent if compared to previous fiscal year. It reflects some improvements in the national system of tax collection and administration and the rise in donor funding that passed from ETB 12.4 million in 2009/10 to about ETB 22 million in 2010/11. Since mid-2008, the Government decided to merge the Federal Inland Revenue Authority, the Ethiopian Custom Authority and the Ministry of Revenue to form a single, unified revenue agency (the Ethiopian Revenues and Customs Authority) whose mission is to broaden the tax base, improve collection and reduce evasion. Up to now, the result has been positive, with a gradual increase of the tax revenue-GDP ratio from 8.1 percent in 2008/09 to 11.3 percent in 2010/11. Total expenditure in 2010/11 has shown an increase of 29.3 percent if compared to previous fiscal year and its focus is mainly on poverty-reducing programmes which include agriculture, food security, health, education and road construction. The overall balance of Government finance in 2010/11 (including external grants) shows a budget deficit of 1.6 percent of GDP, similar to the previous years.

With regard to the external sector, trade balance has improved in 2010/11 reflecting strong demand export commodities, especially from emerging economies, and reduced imports. In 2010/11, the total value of exports grew by about 37 percent, driven by high international prices of key export commodities such as coffee, gold, leather products, meat, pulses, flowers, chat and oilseeds. At the same time, imports slightly declined as a consequence of high international commodity prices (especially fuel), constrained domestic availability of trade credits due to the credit ceilings until early April 2011 and the substantial devaluation of local currency at the end of 2010. By the end of the 2010/11 fiscal year, the trade deficit reached the level of USD 5.5 billion, with a decrease of about 12 percent if compared to previous two record years and thus exports were able to finance about 33 percent of imports. In the coming years, the plan of exporting electricity (produced by new hydropower electric generation projects) in neighbouring countries may represent a real option to increase exports and further alleviate the trade deficit.

Table 2: Major export commodities (value in USD million and volume in '000 tonnes)

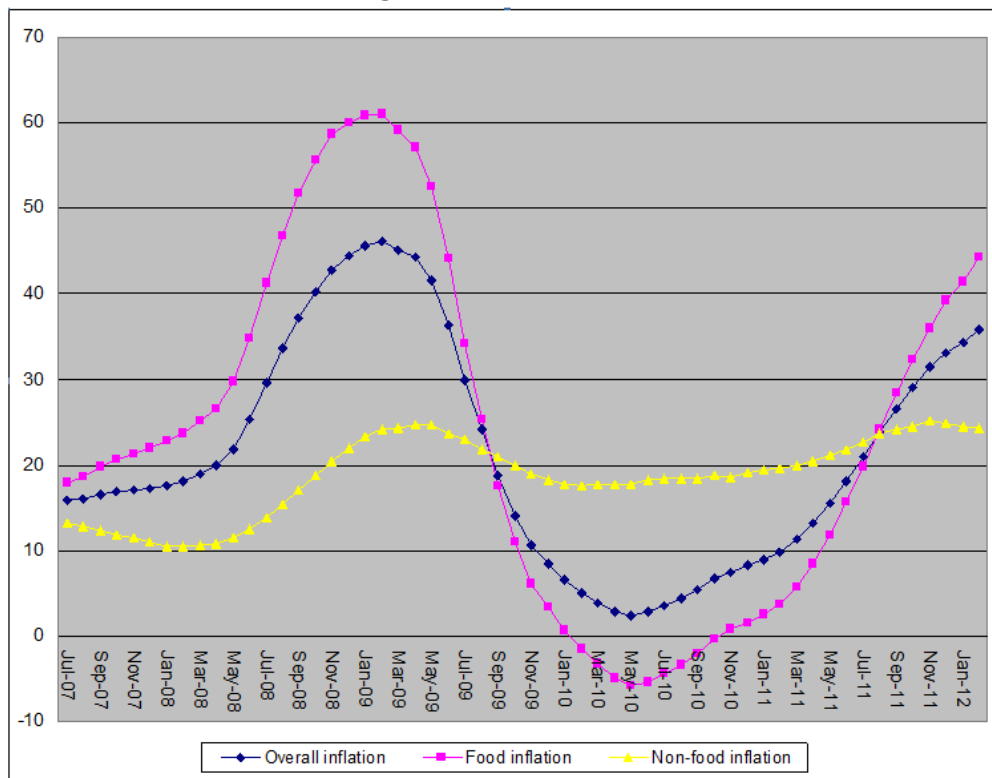
Commodity	2008/09	2009/10	2010/11	Change over last year (%)
Coffee				
Value	375.0	528.3	841.8	59.3
Volume	134.0	172.2	196.1	13.9
Oilseeds				
Value	356.1	358.5	326.6	-8.9
Volume	287.0	299.0	254.2	-15.0
Chat				
Value	138.7	209.5	238.3	13.7
Volume	25.4	36.1	41.0	13.5
Leather				
Value	75.3	56.4	103.8	84.1
Volume	7.3	2.9	5.2	77.8
Pulses				
Value	90.7	130.1	137.9	6.0
Volume	138.0	225.7	224.5	-0.5
Gold				
Value	97.8	281.4	461.7	64.1
Volume (in '000 kg)	4.9	8.9	11.2	25.5
Other exports	313.4	438.9	637.0	45.1
Total export value	1 447.9	2 003.1	2 747.1	37.1

Source: National Bank of Ethiopia and Ethiopian Customs Authority.

On 1 September 2010, the national currency was devaluated by about 16.7 percent against the USD, moving from USD 1=ETB 13.6 to USD 1=ETB 16.7. It intended to enhance trade competitiveness, encourage import substitution, boost economic growth and improve foreign-exchange reserves. In fact, at the end of fiscal year 2010/11, foreign-exchange reserves spiked at USD 2.35 billion, about 20 percent above previous year and equivalent to 2.7 months of next year's import, representing the higher cover level attained in the last five years. The increase of foreign-exchange reserves was also due to remittances and foreign direct investment that, despite the global financial crisis, were on a rising trend.

As February 2012, overall year-to-year inflation rate stood at 35.9 percent, mainly driven by a rampant food inflation of 44.3 percent. In fact, after several straight months of food price deflation (from February to October 2010),¹ food prices started to raise by the end 2010, first with modest increases and then with a sharp acceleration since May 2011 with stable and increasing two-digit growth in following months (see Figure 1). Regarding main food commodity groups, all price indexes (December 2006=100) reached record or near record levels during Mission's visit. The February 2012 cereal price index (whose weight is about 23 percent of CPI) was at 269.9, very close to the record peak of 290 of September 2008 during the food price crisis, while in last 12 months the indexes of pulses, tubers and oils/fats have increased by 61.6, 37.9 and 22.9 percent, respectively (see Figure 2). Strong price increases were also reported for important cash crops such as coffee and tea leaves (+41.4 percent) and spices (+63.8 percent) and for meat products (+78.3 percent)

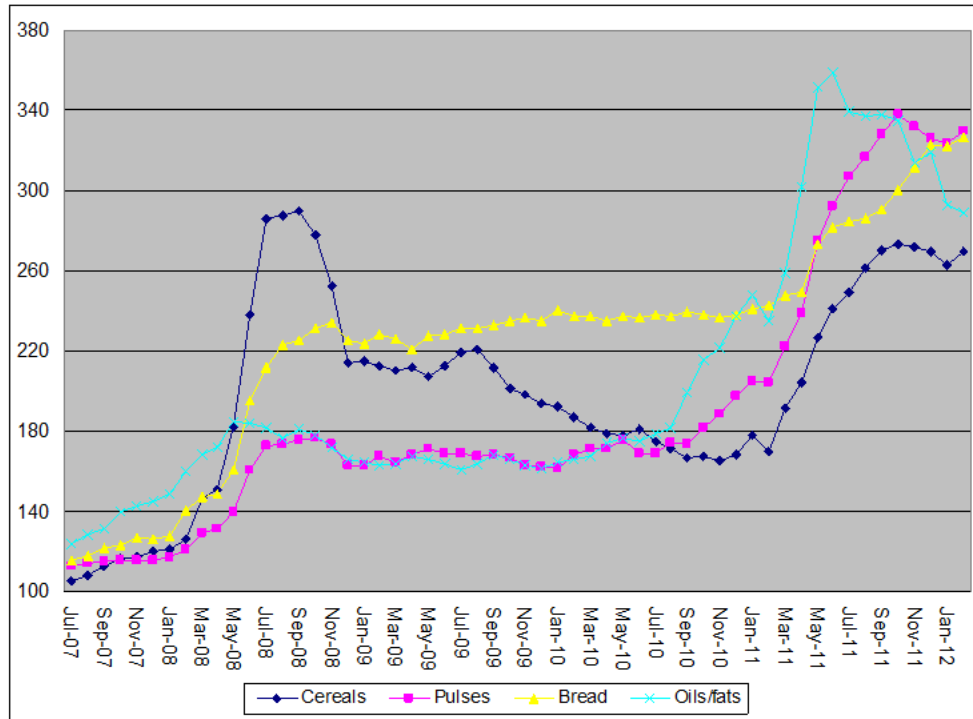
Figure 1 – Inflation trend



Source: Central Statistical Agency.

¹ Several months of food price deflation are the main reason explaining the low overall inflation rate of 9.4 percent in 2010/11 (July-June, moving average), while non-food inflation was relatively constant, between 17.7 and 19.6 percent.

Figure 2 – Consumer Price Index of Main Food Commodities



Source: Central Statistical Agency.

The recent surge in overall inflation rate is explained by a series of factors, such as the rising international commodity prices (mainly fuel, food and raw materials), the expansion of national broad money supply with negative real interest rates, the large currency devaluation, the oligopolistic wholesale market structure and an overall increase in aggregate demand (especially from employees in the service sector and the public administration).² In an attempt to control inflation and stabilize markets, price caps on 18 essential commodities, including bread, rice, meat, cooking oil and sugar, were imposed in January 2011 (most lifted in late May 2011) and the government intervened by importing wheat, sugar and palm oil to be distributed at subsidized prices to poor urban households. In April 2011, in order to tighten money supply and reduce liquidity, the National Bank of Ethiopia (NBE) required private banks to hold 27 percent of their lending portfolio in the form of 5-years NBE bills. In addition, the NBE has ceased lending to the Government since the first quarter of 2011/12 fiscal year and financing of public sector borrowing requirements is mainly addressed by sales of treasury bills to commercial banks and non-bank institutions.

2.2 Agriculture and food security policy

The recently adopted five-year Growth and Transformation Plan (GTP) (2010/11-2014/15) gives special emphasis to the role of agriculture as a major source of economic development. Following the Agricultural Development-Led Industrialization (ADLI) strategy and building on PASDEP achievements, the GTP has the priority to intensify productivity of smallholders and strongly supports the intensification of market-oriented agriculture, either at national than international level, and promote private investments. The plan includes scaling up of best practices to bring average farmers' productivity closer to those of best farmers, expanding irrigation coverage and shifting to production of high value crops to improve income of farmers and pastoralists, with complementary investments in market and infrastructure development. Although the commercialisation of smallholder farming is expected to continue to be the major source of agricultural growth, support will also be given to increase private investments in large commercial farms, especially in lowlands. Regarding pastoralists, the GTP gives priority to water and infrastructure development. In particular, in areas suitable for irrigation, resettlement of pastoralists on voluntary basis will be considered. Rapid agricultural growth will be ensured also by strengthening extension services and adopting new technologies and best practices that conserve soil and natural resources.

² At the beginning of 2011, wages of civil servants (about one million people) increased on average by about 33 percent, representing a re-alignment of salaries to the higher cost of life after three years of no increase.

The Agricultural Growth Programme (AGP) is a major component of the GTP and its objective is to increase productivity and market access for key crop and livestock products in selected areas with good potential for agricultural growth. It aims to achieve a greater balance between targeted support to the poorest rural households in food insecure areas and support to more dynamic households and enterprises. The AGP focuses on 83 *woredas* in Amhara, Oromia, SNNP and Tigray regions, with a total population of 9.8 million people in about 2 million agricultural households, targeting mainly small and medium-scale farmers. The GTP consists of three components:

1. Agricultural Production and Commercialization: to strengthen the capacity of farmer organizations and their service providers to scale up best practices and adopt improved technologies in production and processing, and to strengthen marketing and processing of selected commodities through engagement with private sector stakeholders.
2. Small-scale Rural Infrastructure Development and Management: to support the construction, rehabilitation and/or improvement, and management of small-scale rural infrastructure to improve productivity and to further develop and increase the efficiency of key value chains through improved access to markets.
3. AGP Management and Monitoring and Evaluation: to support effective coordination and management of the AGP at all levels of implementation, to establish an effective monitoring and evaluation system, and to create a learning environment for continuous improvement of the AGP design and other agricultural growth interventions.

At the beginning of 2010, the MoARD launched the 2010-2014 Food Security Programme (FSP) with the aim of improving food security for chronic and transitory food insecure households in rural areas, putting them on a trajectory of asset stabilization and accumulation to finally become food sufficient first and then food secure. The programme has four components: i) the Productive Safety Net Programme (PSNP); ii) the Household Asset Building Programme (HABP); iii) the Complementary Community-based Infrastructure Programme (CCI); and iv) the Resettlement Programme. Donor financing is allocated to PSNP and HABP capacity building activities, while Government financing to the FSP is allocated to HABP, CCI and Resettlement components.

Launched in January 2005, the PSNP currently targets 7.57 million chronically food-insecure rural people and it is expected to reach 8.3 million people in 320 *woredas* by 2015 in eight regions (including Somali region). Financed by a multi-donor consortium, the PSNP represented a significant transformation of the Government's food security policy, moving away from appeals for emergency food aid toward a more articulated development-oriented plan to address the underlying causes of household food insecurity and protect livelihoods. PSNP's objectives are the reduction of household vulnerability, the improvement of household and community resilience to shocks and breaking the cycle of dependence on food aid. The key goal is to enable chronically food insecure household to acquire sufficient assets and income in order to "graduate" out of food insecurity.

Through the PSNP, chronic food insecure families receive cash or food transfers on a regular and predictable basis, either 'for work' (through labour-intensive public works in soil and water conservation, water harvesting, small-scale irrigation, reforestation, rural infrastructure development, horticultural development and water supply schemes) or 'for free' (through direct support to labour-poor households, including the elderly, sick and female-headed households).

The first "transition" phase of the PSNP has been completed in December 2006 and focused on testing and strengthening institutional arrangements and delivery systems. The second "consolidation" phase started in the first quarter of 2007 and lasted until the end of 2009. It aimed mainly at improving the efficiency and predictability of transfers, enhancing targeting and developing better financing instruments for risk management. Following a comprehensive review process in 2009, a third "integration" phase started in 2010 and will last until 2015. The rationale for the current phase is the acknowledgment that strengthening livelihoods to the extent that households become food secure and resilient to shocks is a process that is longer and more complex than that suggested by the initial design of the PSNP. This phase is structured on four components, three of them already characterized earlier phases of PSNP, while the fourth one is new: (i) Safety Net Grants for Labour-intensive Public Works and Direct Support (ii) Drought Risk Financing, which provides timely resources for transitory food insecurity in response to weather or price-related shocks, (iii) Institutional Support, focused on programme management, capacity building, monitoring and evaluation, and transparency, and (iv) Support to the Household Asset Building Programme (HABP), the second component of the FSP, which helps food-insecure households to diversify their income streams and increase productive assets through technical assistance and financial services offered by micro finance institutions (MFIs) and Rural Savings and Credit Cooperatives (RuSACCOs).

The third component of the FSP is the Complementary Community Investment (CCI) programme that complements PSNP labour-intensive public works activities with large capital-intensive community infrastructure development, mainly in pastoral, semi-pastoral and moisture stressed highland areas. The fourth component is the Resettlement Programme that aims at improving access to land and reduce environmental stress due to high population pressure by voluntary relocating food insecure households often living in vulnerable highlands to more productive areas.

3. FOOD PRODUCTION IN 2011

3.1 General

Ethiopia comprises an estimated area of 112 million hectares, of which 65 percent is suitable for some form of agriculture. At present less than 15 percent of this total area is cultivated for the production of major food crops. According to Central Statistical Agency (CSA) figures, 12.9 million hectares are being cultivated by about 13 million farmers to produce cereals, pulses, oil seeds and root, stem, tuber and tree crops, including major export crops of coffee, sesame and sugar cane. Approximately 640 000 ha are estimated to be under equipped irrigation schemes, with an estimated 400 000 to 500 000 hectares under communal flood irrigation, indicating that, despite recent increases in the area of land covered by some form of irrigation, the nation's annual harvests overwhelmingly depend on the quantity, timeliness and equitable distribution of the rainfall (see rainfall calendar in Annex 1), which normally occurs in two distinct rainy seasons, the *belg* and the *meher* seasons. Crops harvested up to 31 August are regarded as *belg* crops, while crops harvested from 1 September to 31 March are regarded as *meher* crops. Traditionally, the *belg* production supplies about 8-10 percent of annual national crop production, although in the 2011 season this was reduced due to unfavourable weather conditions in most producing areas. The increasingly highly variable nature of the rainfall, particularly inherent in the semi-arid areas of Ethiopia, implies that in any zone and in any year there are always farming communities, particularly in the lowlands, that experience a less than satisfactory rainfall. Therefore, agricultural production at the national level, despite the increased use of improved seeds, fertilizers, chemicals and some improved production technologies, naturally varies somewhat from year-to-year depending on climatic conditions.

The main cereal staples are wheat, barley, teff, maize, sorghum and finger millet and they are grown in varying proportions according to the parameters noted above conditioned by the traditional culture and prevailing market conditions. In terms of sheer quantity of consumable carbohydrate, maize and wheat are more important crops than teff. However, teff is the preferred cereal for the production of the basic staple food injera and as such commands a far higher market price than all other cereals. Also being a tiny grass seed, it has far better keeping qualities under local conditions than the more familiar cereal grains and may therefore be stored for longer than other cereals with far fewer losses making it a very important cash crop for most middle highland and lowland farmers.

Carbohydrate sources other than cereals include the stem of enset or false-banana (*Enset ventricosum*), cassava, sweet-potatoes and potatoes all of which are found in either the middle altitude or highland areas of the southern and central regions of the country.

Cash crops such as coffee, oilseeds, tea, chat, spices and sugar-cane maintain a high degree of importance on households' economy. Fruit crops include apple, mango, bananas, avocados, papaya and various citrus crops. Prices are currently attractive for these commodities which are stimulating production.

The increasing financial importance of eucalyptus plantations of varying sizes to farmers who reside in relatively close proximity to urban areas is to be noted. Demand for eucalyptus poles by the construction industry is substantial and sustained and this often provides the largest portion of income to many strategically located farmers. With urban migration running at about 3 percent per annum, with a movement of approximately 2.5 million people, demand for basic house construction materials is high.

Root and tuber crops are very closely related to household food security and play a pivotal role especially in highly populated areas, such as SNNPR, in filling the critical periods of household food insecurity, which peaks from March to June.

In the western, eastern and southern lowlands and valley bottoms and escarpments, indigenous grasses and acacia browse support both settled and transhumant livestock. Of particular importance to the national economy are the agro-pastoralist and pastoralist herds and flocks in the Regions of Afar and Somali. Similar pastoralist systems are also found in the southern zones of Bale and Borena, Oromia Region, in South Omo Zone, SNNPR and in the western lowland forest-savannahs that stretch from Gambella, via the region of Benishangul-Gumuz and western Amhara to Tigray.

National livestock production from pastoral areas is augmented by the settled agro-pastoralists throughout the central plateaux where common grasslands, comprising indigenous grasses and clovers, provide intensively grazed pasture, which, coupled with browse and crop residues provide the feed for the livestock in mixed farming systems producing sheep, goat and beef and dairy cow products for sale and home use.

3.2 Rainfall in 2011

Rainfall in Ethiopia occurs in two main distinct seasons (see Annex 1):

- The *belg*³ minor rains that usually begin in February and end in April-May supporting both short cycle crops that will be harvested from July and longer cycle crops such as maize, sorghum and finger millet that will be harvested up to end of August; and
- the *meher*⁴ main rains supporting crops planted in or before the *meher* season, which usually start in June-July and end in September-October. Such crops are harvested from September to the following January.

The Mission was provided with rainfall data from the National Meteorological Agency (NMA) and had access to satellite images on NDVI elaborated by the Joint Research Centre of the European Commission.

In 2011, *belg* rains were generally very poor following La Niña effect that started at the end of 2010. Most affected areas were North Wollo, South Wollo, Waghemra and areas of South and South Eastern Tigray, with significant reductions in crop production in traditional *belg* areas such as Arsi, Bale, North Shewa and the highlands of East and West Hararghe. In bimodal rainfall areas, double season cropping was much reduced due to the poor *belg* rains that induced farmers to plant long cycle crops, such as maize and sorghum, to be harvested during the *meher* season. In western and northern unimodal areas, *meher* rains were often late inducing farmers to increase planted area with short cycle crops, such as teff, wheat and barley. The Alamata and Raya Azebo plains received minimal floods from *belg* rains in adjacent western highlands with inadequate spate irrigation for sorghum and maize crops that were severely affected. However, some farmers in these *woredas*, on the periphery of the flood plains, were attempting to plant various cereal crops at the time of the mission, to make maximum use of available moisture from late and unseasonable *meher* rains.

The poor performance of 2011 *belg* rains had serious consequences in limiting availability of fresh food from the harvest of crops such as maize, beans, sweet potatoes, Irish potatoes and leafy vegetables, but also the availability of drinking water for humans and livestock as well as stimulating new growth in the pasture and browse after the dry season in agro-pastoral and pastoral areas.

In contrast, the major 2011 *meher* rains were generally timely, sufficient and well distributed, especially western Amhara, western and central Oromiya, and south-western SNNPR. In other areas, rains commenced by 2 to 3 weeks later than usual, affecting to varying extents most areas of Tigray, eastern Amhara and south-eastern Oromiya lowlands. Early cessation of *meher* rains in areas of southern Tigray, North/South Wollo and eastern Oromiya had negative impacts on crops nearing maturity, especially maize and sorghum. Unexpected late rains during late October and early November caused concern at the time and had some negative effects on mature teff which suffered from shattering and some lodging. The rains also disturbed farmers who were harvesting mature crops and caused some localized post-harvest losses. Late rains, however, impacted positively on late planted highland crops, on pastures and were welcomed in some areas of SNNPR, especially where farmers were keen to plant sweet potato and other traditionally grown root crops such as Taro.

During the last dekad of November, torrential rains caused localized flash floods in Somali region along Shebelle, Genale and Dawa rivers, with displacement of people and damage to crops, livestock and infrastructures.

³ Including gu rains in Somali Region and sugum rains in Afar Region.

⁴ The deyr rains in Somali Region, starting in October, may be seen as follow-on the *meher* rains elsewhere.

3.3 Area planted

CSA figures for the 2011 *meher* season indicate that 11.20 million hectares were planted to cereals and pulses, which shows a slight increase on last year's planted area of 11.05 million hectares. Cereals accounted for 9.80 million hectares of the above total and pulses for 1.39 million hectares, both figures being close to last year estimated planted areas. In the absence of similar data for the commercial sub-sector, the Mission estimated area planted with cereals and pulses at 195 000 ha, using as a proxy the 2010 data.

3.4 Factors affecting yield

3.4.1 Seeds

The total annual seed requirement by the agricultural sector in Ethiopia is estimated at about 700 000 tonnes. During 2011, about 15 percent of this was met by the formal sector, distributing over 105 000 tonnes of improved seeds (see Table 3). The formal seed sector comprises the Ethiopian Seed Enterprise (ESE), multinational seed companies, regional seed enterprises, cooperative unions and approximately 35 private producers.

Whilst mission field reports indicated that during the 2011 *meher* season most farmers had access to some seed at the appropriate time, specific unmet demand was reported for pulse seeds, improved rust tolerant wheat seed varieties and short season hybrid maize. A stock of over a thousand tonnes of a long season maize variety remained unsold.

Table 3: Improved seed distributed during last five years (tonnes)

Crops	2007	2008	2009	2010	2011
Wheat	7 560	12 175	12 322	20 926	56 357
Teff	582	654	787	1 955	4 351
Maize	5 475	4 193	3 819	28 101	37 563
Barley	636	646	905	1 638	3 705
Sorghum	28	79	150	349	182
Rice	-	-	-	-	616
Millet	-	-	-	-	81
Pulses	1 006	1 081	1 061	1 113	2 941
Total	15 287	18 828	19 044	54 082	105 796

Source: Ethiopian Seed Enterprise (ESE).

The national seed production target for the formal sector is based on a participatory assessment with input from *woredas*, development agents and individual farmers concerning their seed requirements, such information being aggregated into *woreda*, zonal, regional and national demand statistics. The target figure is then apportioned to various producers such as ESE, RSE (Regional Seed Enterprises) and others.

Although production of improved seed has increased significantly over recent years to meet increasing demand, a gap between production and specific farmer requirements (i.e. rust tolerant wheat varieties) remains. It is clear from discussions and observations in the field that the MoA and Regional BoA's, EIAR, (Ethiopian institute of Agricultural Research) ARARI (Amhara Regional Research Institute), regional seed enterprises in collaboration with ICARDA (International Centre for Agricultural Research in the Dry land Areas), CYMMYT and others collaborate to improve farmer access to improved seed.

3.4.2 Fertilizers

Sales of fertilizers for 2011 were delayed and less than the expected demand of 600 000 tonnes because *meher* rains were late in many areas and farmers usually prefer to purchase their basal fertilizer only when rains commence and land preparation starts. Use of fertilizer during the 2011 extremely poor *belg* crop was also much reduced. Price increases were an issue in some areas, which was said to have reduced sales. According to CSA figures provided to the Mission, over 4.8 million hectares (about 43 percent of farmers) received fertilizer during the 2010/11 *meher* season. Observations in the field were that use of fertilizer increased in some cases with those farmers in high potential production areas, who had access to cash or credit, and whose yields were traditionally higher. Such farmers were applying high rates of fertilizer of 8

quintals of fertilizer per hectare on wheat, where a yield of 50 to 60 quintals was expected. Normal fertilizer application recommendation's by extension workers to farmers range from 2 to 4 quintals per hectare.

Table 4: Fertilizer sales in 2009, 2010 and 2011 (tonnes)

Region	2009			2010			2011		
	DAP	Urea	Total	DAP	Urea	Total	DAP	Urea	Total
Oromia	10 9143	48 946	158 089	146 523	59 351	205 874	129 503	59 163	188 666
Amhara	86 270	56 706	142 976	118 320	80 215	198 535	116 316	85 254	201 569
SNNPR	42 285	7 375	49 660	63 734	17 642	81 376	71 292	24 785	96 077
Tigray	10 692	7 220	17 912	17 169	12 101	29 270	21 083	14 143	35 226
Harari	9	57	66				2 348	2 433	4 781
Afar	252	126	378		400	400			
Somali	134	87	221	279	164	443	25	24	49
Ben.Gumu									
z	800	200	1 000	209	184	393	2 114	448	
Dire Dawa	10	10	20				46	72	117
Others	28 644	27 710	56 354	6 075	31 519	37 594			
Total	278 239	148 437	426 676	352 309	201 576	553 885	342 725	186 321	526 485

Source: Agricultural Marketing Department, MoARD.

Commercial maize producers who obtained good yields this season also increased fertilizer use. It would appear from available data and field reports therefore that farmers in high potential areas using improved seeds used increased amounts of fertilizer to obtain higher yields but that increased use by smallholder farmers was depressed due to climatic and financial reasons.

Other factors influencing fertilizer usage are availability of product, extension advice, economic benefits of use and these factors would need to be analysed in depth in an effort to increase usage and hence crop production. The use of compost, also promoted by the agricultural extension services, is increasing generally, and especially amongst the poorer farmers, partly in view of rising fertilizer prices. Conservation agriculture is also being promoted through various initiatives, where lower fertilizer applications are ultimately required, and where composting/crop mulches play a significant role.

Fertilizers are available to farmers through cooperative unions who in most cases require full cash payment for fertilizer. Credit facilities are now rarely provided due to frequent payment defaults in the past. However, in SNNPR, where the highest percentage of sales are recorded, it was observed that credit was available to farmers, with down payments ranging from 25 – 50 percent of the purchase price. This increasing price of fertilizer coupled with minimal credit facilities may deter some resource poor farmers, who find it particularly and increasingly difficult to finance seasonal crop production inputs, from utilizing higher levels of fertilizer, or any amount, on crops, thus achieving higher production levels.

Ethiopia totally depends on imports to meet its annual fertilizer demand. The parastatal Agricultural Input Supply Enterprise (AISE) plays the role of procuring entity, while cooperatives and unions are responsible for domestic distribution.

3.4.3 Chemicals

There was little available data on the importation and use of agricultural chemicals, except some from AISE which indicated that 320 000 litres of liquid chemical and 5 000 kg of powder chemical had been imported during the year 2010. No details were obtainable as regards type or intended use. Drugs for use on livestock were also imported to the value of ETB 2 467 000, but the type was not specified. 7539.5 kg of fungicide were utilized to control Yellow Rust in Amhara, SNNPR and Oromiya. It was reported that chemical weed control is on the increase, but no data to substantiate amounts either imported or utilized was available. During discussions with farmers a concern was raised regarding the cost and availability of fungicides and spraying equipment for disease control, especially yellow rust.

3.4.4 Pests and diseases

The 2011 *meher* season has been relatively unaffected by pests and diseases on any significant scale. Some infestations of army worm occurred on crops and grazing lands, with both areas affected and damage recorded varying. Stalk borer infestation in maize and sorghum was reported in some areas where crops at vegetative stage were inspected. Stalk borer can be easily controlled with preventative chemical application, which appears not be a routine management activity with some farmers. Other minor insect infestations with resultant crop losses were reported from Lady Bird Beetle on barley and Bollworm on field peas.

One chronic weed problem affecting yields, especially of maize and sorghum, is *Striga*, a parasitic weed, and varying degrees of infestation were reported in many areas.

Yellow rust, stem rust and leaf rust, potentially disastrous diseases in wheat, have been an issue during the season in some areas of the country, but infestations were mild as compared to previous years due to effective chemical controls. The introduction of rust tolerant varieties on a trial basis was also observed by the Mission and many farmers and extension agents had been sensitized during a series of field days regarding disease control measures.

3.5 Other crops

Other major crops contributing to household food security vary across Ethiopia, but root and tuber crops would rank highly, with increasing importance even in formerly non-traditional root and tuber crop areas. Cassava, sweet potato, Irish potato, taro and enset are highly important particularly in SNNPR and suffered significantly following poor and erratic rainfall during the 2011 *belg*, resulting in a decline in production. Prospects for 2012 production of sweet potatoes are also not promising as area planted in September/October 2011 declined substantially due to shortages of planting materials and crops suffered from moisture stresses during the Jan-March extended dry weather conditions.

Rice production is rapidly increasing also following government plans. Reports from the field indicate a great interest in rice production, even by small farmers, due to good yields and attractive prices. According to CSA figures, area planted was 35 088 ha in 2007, increasing to 59 310 ha in 2009. However, CSA figures obtained for 2011 indicate only 32 292 ha of rice was planted by small farmers.

Oilseeds, particularly sesame, are important in the north to both commercial and peasant farmers. Sesame crops in Amhara and Western Tigray, mostly completely harvested during the mission's field visits, were reported to be good this year, with increased yields if compared to previous season.

Coffee is mainly grown in Oromia region and SNNPR on an estimated 500 000 hectares. Plantations were affected by late arrival and poor performance of *belg* rains and by a dry spell from April to May 2011. These adverse weather conditions contributed to significant decline in production especially in East and West Hararghe. Overall coffee production in 2012 is expected to fall by an estimated 15 to 17 percent.

Chat, a mild stimulant harvested from a shrub (*Catha edulis*), is the second major agricultural export and is grown in direct competition to coffee as it offers quicker returns on investment. Chat was also affected by late arrival and poor performance of *belg* rains and a dry spell during April to May. However, the crop is slowly recovering as many farmers use supplementary irrigation.

3.6 Livestock

Ethiopia has one of the largest livestock inventory in Africa, including more than 49 million cattle, 47 million small ruminants, nearly 1 million camels, 4.5 million equines and 45 million chickens, with livestock ownership currently contributing to the livelihoods of an estimated 80 percent of the rural population. Livestock plays an important role in Ethiopia's economy in terms of its contributions to both agricultural value-added and national GDP. The contribution of livestock and livestock products to exports and foreign exchange earnings is also considerable. At the household level, livestock plays a critical economic and social role in the lives of those who lead a pastoral or ago-pastoral lifestyle and smallholder farm households. Livestock also fulfils an important function in coping with shocks, accumulating wealth and serving as a store of value in the absence of formal financial institutions and other missing markets. In the case of smallholder mixed farming systems, livestock provides nutritious food, additional emergency and cash income, transportation, draught power (over 11 million oxen are utilized for ploughing fields and other farming activities) and fuels for cooking. In the case of pastoralists, livestock represents the sole means to support and sustain their livelihoods. In drought prone grazing areas in the Eastern, North-eastern, South-eastern and Southern lowlands, cattle, sheep, goats and camels are managed in migratory pastoral production systems, as opposed to the highlands, where livestock are kept under a non-migratory regime, utilising common grazing areas and crop residues.

During the first semester of 2011, following the poor performance of the *belg/ganna* rainy season, severe shortages of pasture and water were reported in Borena, lowland areas of Bale of Oromia and most areas of Somali region, with deteriorating livestock body conditions, disruption of breeding cycles, increasing mortality rates and poor milk production.

Currently, the livestock situation has generally improved due to recent favourable rainfall. In southern Somali region, abundant October-to-December *deyr* rains contributed to the replenishment of water catchments, improving pasture availability and animal body conditions. Goat conceptions have increased and kidding/calving started at the beginning of 2012. Conversely, the full recovery for cattle will need up to 2-3 average seasons to overcome the negative effects of the last two poor rainy seasons. In Oromia, Amhara, Gambella, SNNPR and Benishangul-Gumuz regions, livestock is reported in good conditions due to favourable *meher/kiremt/hagya* rains. Exceptions are some pastoral and agro-pastoral areas in Oromia and some areas in eastern lowlands of Amhara, where the long dry period in the previous season and the consequent overgrazing has severely limited the process of pasture regeneration. In particular, the poor *meher* rains in eastern lowlands on Amhara region have significantly affected long cycle crops, especially sorghum, strongly limiting the availability of crop residue for feeding animals. Widespread unseasonable rains in October and November have also contributed to improve pasture and water supplies in several areas of the country.

In Afar region, physical conditions of camels and goats are generally good, but body conditions of cattle and sheep are below average due to poor 2011 *sugum* rains (March to May) followed by *karma* rains (July to September) that started late and ended early especially in southern areas and in western areas bordering Amhara and Tigray. As a result of poor *karma* rains and severe rangeland degradation, livestock moved early to dry season grazing areas of neighbouring Oromia zone of Amhara, with high risk of early depletion of pasture before the onset of next *sugum* rains in March 2012.

No major livestock disease outbreaks were reported during Mission's field work. Trypanosomiasis is a chronic challenge in the lower Rift valley and western areas of the country and, through the supply of fly traps and necessary drugs, the situation has been temporarily alleviated. Government vaccination programs have been supported during 2011 by FAO and 15 million goats and sheep have been vaccinated against the Pest des Petit Ruminants (PPR). Other diseases which were reported include anthrax, blackleg, Contagious Bovine Pleuro Pneumonia (CBPP), Contagious Goat Pleuropneumonia (CCPP), sheep and goat pox. Many of the diseases affecting livestock in Ethiopia are trans-boundary in nature and regional collaboration is required to both prevent and contain outbreaks. The often porous and extensive borders allow for cattle influxes from neighbouring countries, especially Kenya and Sudan, which have caused conflicts in the past over grazing and water, with sometimes an increase in disease incidence.

3.7 Cereal and pulse production estimates

Area data used in the calculations of the 2011 *meher* cereal and pulse production estimates were provided by CSA for peasant holdings. Yield estimates have been derived by reconciling the CSA pre-harvest 2011 yield estimates with the findings of the Mission during the field work in late November. Regional totals of area and production, prepared by the Mission, are presented in Table 5 and they indicate a 2011 peasant *meher* cereal and pulses production of 21.15 million tonnes from 11.2 million hectares. As reported in Table 6, 2011 output is 7.3 percent greater than last year's CSA production estimates from 1.3 percent greater area. Production of cereals is 7.8 percent greater than last year's CSA estimates, while pulses return are only 2.5 percent higher than last year's production.

Table 5: Area ('000 ha), production ('000 tonnes) and yields (tonnes/ha) of grains in 2011 *meher* season for peasant holdings

Regions	Teff	Barley	Wheat	Maize	Sorghum	Finger Millet	Other	Cereals	Pulses	Cereal & Pulses
Tigray										
Area	170.3	104.4	101.8	68.7	209.6	75.1	4.1	734.0	47.3	781.3
Yield	1.3	1.8	1.9	2.2	2.0	1.5	2.5	1.8	1.4	1.8
Production	221.2	185.2	193.4	153.7	428.3	113.2	10.3	1 305.3	64.2	1 369.5
Afar										
Area					2.7		5.0	7.7	1.0	8.7
Yield					1.7		1.7	1.7	0.5	1.6
Production					4.6		8.6	13.2	0.5	13.7
Amhara										
Area	1 049.3	354.3	502.7	489.8	687.5	234.7	28.9	3 347.2	586.5	3 933.7
Yield	1.4	1.4	1.8	2.6	2.1	1.7	3.0	1.8	1.4	1.7
Production	1 499.2	499.3	892.8	1 276.3	1 419.4	393.2	87.5	6 067.7	800.8	6 868.5
Oromiya										
Area	1 289.5	472.2	759.3	1 188.4	752.8	92.6	23.6	4 578.4	552.1	5 130.5
Yield	1.4	2.1	2.4	2.7	2.3	1.6	1.8	2.1	1.6	2.1
Production	1 751.5	986.7	1 835.7	3 170.1	1 729.1	150.8	43.2	9 667.1	863.4	10 530.5
Somali										
Area				23.1	23.7		5.1	51.9	0.6	52.5
Yield				0.8	0.6		0.2	0.6	1.2	0.7
Production				18.6	14.2		0.8	33.6	0.7	34.3
Benshangul Gumuz										
Area	21.5	0.8	2.2	45.7	61.2	30.7	0.6	162.6	14.6	177.2
Yield	1.1	1.2	1.3	2.8	1.9	1.6	1.3	2.0	1.7	1.9
Production	23.3	0.9	2.7	128.7	113.5	49.1	0.8	319.0	24.7	343.7
S.N.N.P.R.										
Area	248.2	80.5	120.3	326.5	113.5	4.0	2.8	895.8	189.1	1 084.9
Yield	1.2	1.8	2.1	2.4	1.7	0.9	2.2	1.9	1.3	1.8
Production	291.2	143.3	252.1	797.2	198.5	3.6	6.4	1 692.3	246.4	1 938.7
Gambella										
Area				6.1	3.5		0.2	9.8	0.0	9.8
Yield				1.7	2.3		2.5	1.9	0.5	1.9
Production				10.2	8.2		0.5	18.9	0.0	18.9
Harari										
Area	0.0	0.0	0.1	2.1	6.6	0.0	0.0	8.8	0.0	8.8
Yield	0.9	0.1	1.4	2.5	1.9	1.1	1.1	2.0	2.6	2.0
Production	0.0	0.0	0.1	5.2	12.6	0.0	0.0	17.9	0.1	18.0
Dire Dawa										
Area			0.8	0.2	8.4		-0.8	8.6	0.4	9.0
Yield			0.2	1.6	1.3		0.2	1.3	2.2	1.4
Production			0.2	0.3	11.2		-0.2	11.5	1.0	12.5
TOTAL										
Area	2 778.8	1 012.2	1 487.1	2 150.6	1 869.5	437.1	69.5	9 804.8	1 391.6	11 196.4
Yield	1.4	1.8	2.1	2.6	2.1	1.6	2.3	2.0	1.4	1.9
Production	3 786.4	1 815.4	3 177.0	5 560.3	3 939.6	709.9	157.8	19 146.5	2 001.9	21 148.4

The increase in maize area and production is partially the consequence of the delay in planting operations of *belg* maize that shifted the harvest from August to September/October and, therefore, a portion of the *belg* maize production has been recorded under *meher* production. Furthermore, the high maize production during the *meher* season is attributed to favourable rains which were well distributed throughout the growing season in main growing areas. The increased use of hybrid seed with appropriate fertilizer applications has also impacted positively on yields obtained per hectare, which displays an increase over last year. The

nearly 11 percent increase in wheat production could be attributed to the increased of improved seed, lower incidence of yellow rust disease and generally favourable rains throughout the season.

Table 6: Area, yield and production of grains in 2010 and 2011 *meher* season for peasant holdings

	2010/11			2011/12			% Change	
	Area ('000 ha)	Yield (tonnes/ha)	Production ('000 tonnes)	Area ('000 ha)	Yield (tonnes/ha)	Production ('000 tonnes)	Area	Prod.
Cereals and pulses	11 048.3	1.8	19 714.5	11 196.4	1.9	21 148.4	1.3	7.3
Cereals	9 690.8	1.8	17 761.3	9 804.8	2.0	19 146.5	1.2	7.8
Teff	2 761.2	1.3	3 483.5	2 781.4	1.4	3 789.9	0.7	8.8
Barley	1 046.6	1.6	1 703.3	1 013.6	1.8	1 815.6	3.2	6.6
Wheat	1 553.2	1.8	2 855.7	1 490.1	2.1	3 177.5	4.1	11.3
Maize	1 963.2	2.5	4 986.1	2 152.9	2.6	5 565.7	9.7	11.6
Sorghum	1 897.7	2.1	3 959.9	1 869.4	2.1	3 939.7	1.5	-0.5
Finger millet	408.1	1.6	634.8	437.0	1.6	709.8	7.1	11.8
Oats/ 'Aja'	30.9	1.5	47.6	28.1	1.6	44.8	9.1	-5.9
Rice	29.9	3.0	90.4	32.3	3.2	103.5	8.0	14.5
Pulses	1 357.5	1.4	1 953.2	1 391.6	1.4	2 001.9	2.5	2.5

Source: 2010/11 data by CSA; 2011/12 data estimated by the Mission.

Time series data for the past five years are provided in Table 7 for comparison purposes. They show that this year's production estimate for cereals and pulses is the highest that has been achieved to date.

Table 7: Grain production from 2006 to 2011 *meher* seasons for peasant holdings

	Cereals		Pulses		Cereals and Pulses	
	Area ('000 ha)	Production ('000 tonnes)	Area ('000 ha)	Production ('000 tonnes)	Area ('000 ha)	Production ('000 tonnes)
2007/08	8 730.0	13 717.0	1 517.7	1 782.7	10 247.7	15 499.7
2008/09	8 765.4	14 496.4	1 588.4	1 964.6	10 353.9	16 461.0
2009/10	9 233.0	15 534.2	1 489.3	1 898.0	10 722.3	17 432.3
2010/11	9 690.7	17 761.4	1 357.5	1 953.2	11 048.3	19 714.6
2011/12	9 804.8	19 146.5	1 391.6	2 001.9	11 196.3	21 148.4

Source: data from 2007/08 to 2010/11 by CSA; 2011/12 data estimated by the Mission.

Production estimates for commercial farms in 2009 and 2010 *meher* seasons were provided to the Mission from CSA (see Table 8). Some data for 2011 were provided by zonal agricultural bureaux and commercial farms visited by Mission teams, but they are evidently incomplete. Judging from previous years' CSA data, the Mission decided to estimate production of cereals and pulses for commercial farms in 2011 *meher* season at about 632 500 tonnes using 2010 output as a proxy.

Table 8: Commercial farm estimates for cereals and pulses (2009-2010)

	2009			2010		
	Area ('000 ha)	Yield (tonnes/ha)	Production ('000 tonnes)	Area ('000 ha)	Yield (tonnes/ha)	Production ('000 tonnes)
Cereals & pulses	222.8		625.5	194.8		632.5
Cereals	206.6		602.0	181.8		611.3
Teff	4.0	1.3	5.4	8.8	1.4	12.7
Barley	2.0	2.3	4.6	1.6	2.5	4.0
Wheat	59.4	3.3	197.4	45.5	3.3	150.4
Maize	72.4	3.5	251.0	59.2	4.8	284.4
Sorghum	67.0	2.1	140.0	61.9	2.4	149.0
Others	1.8	2.0	3.5	4.8	2.2	10.8
Pulses	16.2	1.5	23.5	13.0	1.6	21.3

Source: CSA.

3.8 Belg harvest

The CSA post-harvest assessment of the 2011 *belg* season estimated production at 808 079 tonnes of cereals and 91 254 tonnes of pulses (see Table 9). This is well below previous year *belg* output of 1.3 million tonnes as a consequence of poor *belg* rains that caused a significant reduction of planted area (-7.2 percent) and yields (-27 percent). Inadequate moisture during 2011 *belg* season caused also the near total failure of sweet potato production in central and eastern SNNPR, where the crop is crucial for local food security during the lean season from early March until the *belg* harvest in May/June. Coffee production suffered in some areas, as the crop flowers during this season, and negative effects were in particular observed in Gideo and Sidama zones of SNNPR.

Table 9: Belg season production estimates of cereals and pulses (2009-2011)

	2009			2010			2011		
	Area ('000 ha)	Yield (tonnes/ha)	Prod. ('000 tonnes)	Area ('000 ha)	Yield (tonnes/ha)	Prod. ('000 tonnes)	Area ('000 ha)	Yield (tonnes/ha)	Prod. ('000 tonnes)
Cereals & pulses	1, 205.2	0.64	774.5	1 235.1	1.07	1 316.5	1 146.4	0.78	899.4
Cereals	999.6	0.69	694.2	1 013.7	1.16	1 173.6	934.9	0.86	808.1
Teff	91.4	0.44	40.4	103.8	0.87	90.8	77.8	0.56	43.2
Barley	205.9	0.63	130.8	172.2	0.88	151.3	162.3	0.69	112.8
Wheat	81.4	0.88	71.3	66.1	1.10	72.4	71.8	0.99	70.8
Maize	537.7	0.74	400.3	578.0	1.31	759.8	550.8	0.95	525.9
Sorghum	64.2	0.58	37.5	77.0	1.05	81.0	57.4	0.70	40.2
Others	18.9	0.73	13.9	16.6	1.11	18.4	14.9	1.02	15.2
Pulses	205.6	0.39	80.3	221.5	0.65	142.9	211.5	0.43	91.3

Source: CSA.

Table 10: National production of cereals and pulses from 2009/10 to 2011/12 ('000 tonnes)

	2009/10	2010/11	2011/12 ^{1/}
Meher (peasant holdings)	17 432	19 715	21 148
Meher (commercial)	626	633	633
Belg	1 317	899	1 000
Total	19 374	21 247	22 781

Source: CSA, except for 2011/12 Mission's estimate/forecast.

^{1/} Mission's estimate/forecast.

4. GRAIN SUPPLY/DEMAND SITUATION

4.1 Grain prices

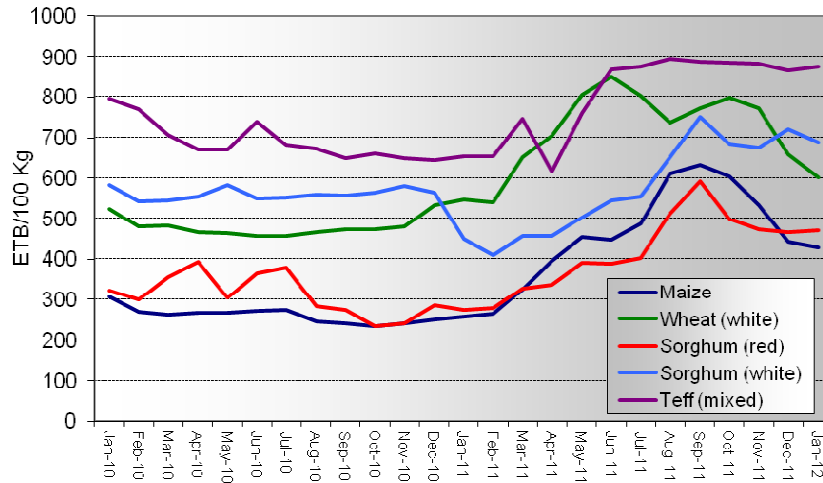
Cereal prices have significantly increased during the first three quarters of 2011 in most markets and then declined until January 2012 as harvesting operations of *meher* crops were progressing in main producing areas. In most markets, they remain well above the levels of one year before. In February 2012, wholesale cereal prices started to climb again, with an average increase of about 5-12 percent, and this situation needs to be closely monitored in coming months.

In general, high food prices are explained by monetary variables affecting the general economy (see paragraph 2.1), but also by other specific factors such as the low production of 2011 *belg* season, the high diesel prices (+35 percent in last 12 months) that significantly increased transportation costs, and the effect on food demand by cash transfers through the PSNP.

Figure 3 shows price trends of main cereal crops in Addis Ababa wholesale market. Here, in September 2011, at the peak of lean season for *meher* season dependant areas, maize and red sorghum were traded at record levels of about ETB 630 and ETB 590 per 100 kg, respectively, registering an increase of about 120-140 percent since the beginning of the year. As these commodities are the cheapest cereals in the country, their exceptionally high prices had a serious negative impact on the food security situation of most vulnerable poor households. Prices of wheat reached their peak earlier in June 2011 and then started to decline

following the trend of international wheat prices and the sale in local markets of Government imported wheat at subsidized prices as part of the market stabilization programme. In fact, the Ethiopian Grain Trade Enterprise (EGTE) procured about 300 000 tonnes of wheat to be sold at ETB 490 per tonne to flour factories in order to control bread price. Since October, EGTE started to sell subsidized wheat at ETB 550 per 100 kg, well below private traders' retail prices, directly to poor urban households through consumers association at kabele level. Showing a completely different trend, prices of teff have remained stable at high levels since June 2011 and reached record ETB 912 per 100 kg.

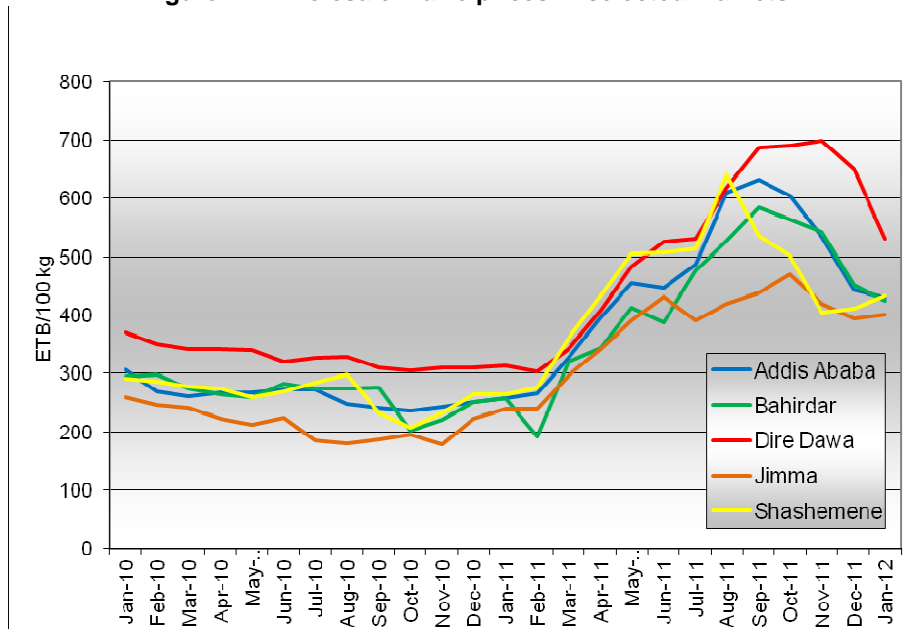
Figure 3 – Cereal prices in Addis Ababa wholesale market



Source: Ethiopian Grain Trade Enterprise (EGTE).

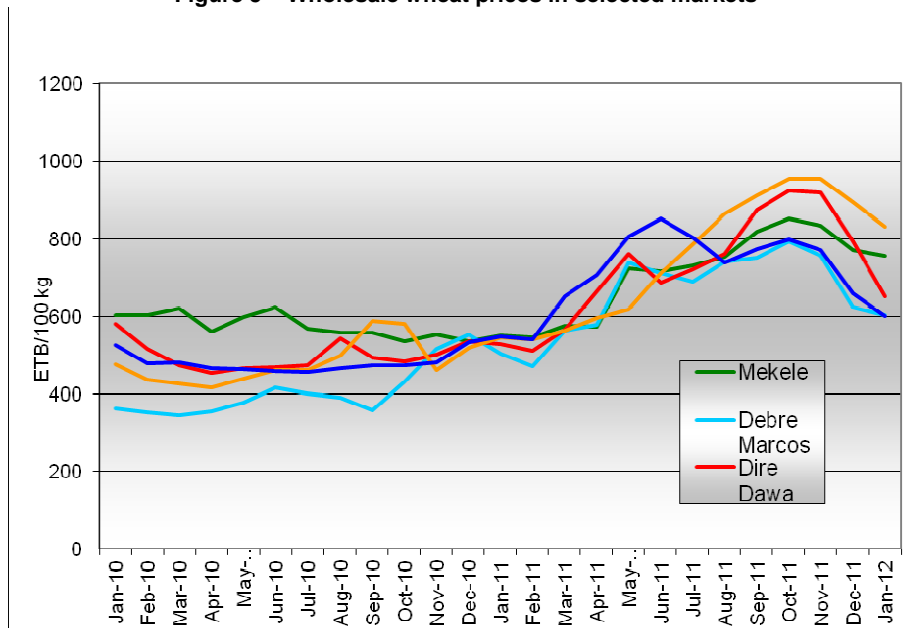
Figures 4 and 5 compare prices for maize and wheat in different markets in both surplus and deficit producing areas. In most markets, maize prices in February 2012 converged at about ETB 450-500 per 100 kg, below the peak registered in September 2011, but still about 60-70 percent above one year before. Maize prices started to decline earlier in September 2011 in Shashemene market as *belg* production was improving local availability. Maize prices were constantly higher in deficit areas such as Dire Dawa and, despite a substantial decline from November 2011 they set at ETB 490 per 100 kg in February 2012. Similar trend applies to wheat prices that declined in most markets to about ETB 660-670 per 100 kg, but continue to stay higher in some markets such as Jimma and Mekele at ETB 780 and ETB 810 per 100 kg.

Figure 4 – Wholesale maize prices in selected markets



Source: Ethiopian Grain Trade Enterprise (EGTE).

Figure 5 – Wholesale wheat prices in selected markets



Source: Ethiopian Grain Trade Enterprise (EGTE).

According to latest WFP Ethiopia Monthly Market Watch reports, wheat prices have been above the import parity price (IPP) by about 10-20 percent during the whole second semester of 2011. It indicates that, despite the high transportation costs that increase the IPP, domestic prices were so high to make commercial imports profitable.

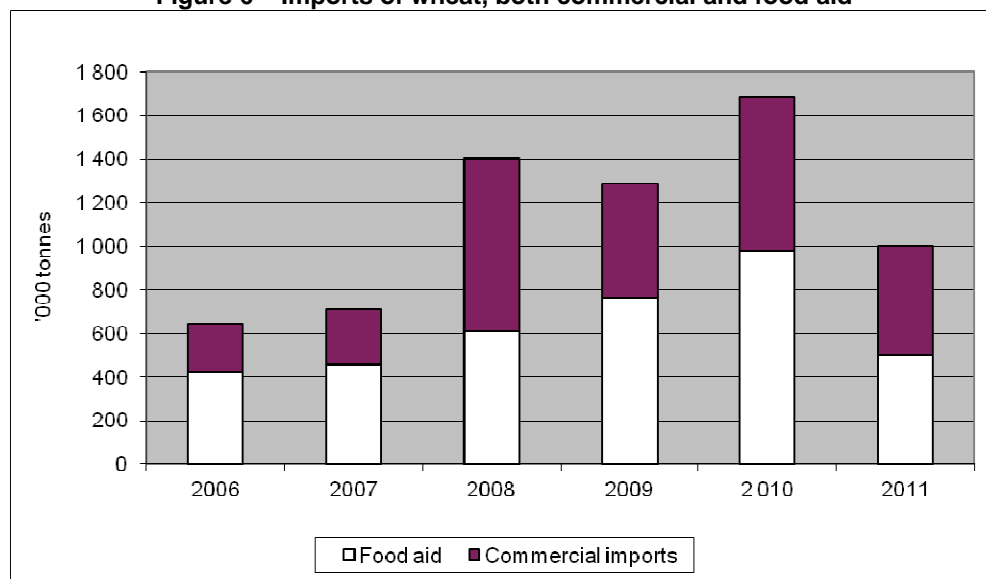
Prices of pulses increased significantly during 2011. In November 2011, prices of horse beans reached record average level of ETB 1 300-1 400 per 100 kg in most markets, doubling the prices that were prevailing at the beginning of the year. A similar situation was for prices of field peas, while less pronounced increases, although still in the range of 40-60 percent, were reported for chick peas. The main reason for this situation is the sustained demand for exports, mainly to Sudan, Pakistan, United Arab Emirates and Turkey. With the arrival on markets of the good 2011 production, prices of pulses have generally declined by 5-10 percent between November 2011 and February 2012, but remain between 50 and 90 percent above the level of one year before (February 2011). An exception is the market of Gondar in Amhara region, where

prices of horse beans and field peas did not decline in recent months, but continued their upward trend, most likely due to the high demand from neighbouring Sudan.

4.2 Recent trends in cereal imports

Commercial imports of cereals, mainly wheat, have risen strongly since 2008, showing the Government's effort to stabilise prices following the significant increase in domestic food prices. As shown in Figure 6, between 500 000 and 790 000 tonnes of wheat per year have been commercially imported since 2008, representing about half of total imported wheat. Conversely, maize imports, ranging in volume between 30 000 to 82 000 tonnes in the last five years, is mainly in the form of food aid. Food aid imports of sorghum have always been negligible, except between 2008 and 2010 when they reached high levels of between 190 000 and 250 000 tonnes.

Figure 6 – Imports of wheat, both commercial and food aid



Source: FAO/GIEWS database.

4.3 National grain supply/demand balance in 2012

As in previous CFSAM reports, the Mission presents a disaggregated version of the national grain supply/demand balance, considering separately teff, wheat, barley, maize, sorghum, finger millet, other cereals and pulses. The 2012 national grain balance (January-December) is summarized in Table 11 and is based on Mission's production estimate for the 2011 *meher* crop and forecast of the 2012 *belg* crop and the latest information on consumption, trade flows and stocks availability.

- Total cereal and pulse production is estimated at 22.76 million tonnes, including 21.13 million tonnes from 2011 *meher* crops by peasant holdings, about 633 000 tonnes by the commercial sector and a provisional forecast of 997 000 tonnes for the 2012 *belg* crop.
- Opening stocks of grains for 2010 marketing year (January/December) are estimated at about 205 000 tonnes, mainly held by the Emergency Food Security Reserve Agency (EFSRA).
- Feed use is forecast at 652 000 tonnes, largely for the poultry industry, dairy industry and equines.
- Seeds requirements are estimated at about 772 000 tonnes on the basis of recommended seed rate in Ethiopia and a planted area of about 12.6 million ha of cereals and pulses in 2011/12 (including the commercial sector and a forecast of 2012 *belg*). The following seed rates have been used: 140 kg/ha for wheat, 110 kg/ha for barley, 35 kg/ha for teff, 30 kg/ha for maize, 80 kg/ha for finger millet, 14 kg/ha for sorghum, 100 kg/ha for pulses and 80 kg/ha for other crops.
- Post harvest losses and other uses are estimated at 3.22 million tonnes, with rates ranging from 5 percent for teff to 15 percent for wheat and sorghum and 20 percent for maize. Total losses averaged about 14.1 percent of the total production.
- Exports are estimated at about 1.3 million tonnes, including 400 000 tonnes of teff, 375 000 tonnes of pulses, 300 000 tonnes of maize and 200 000 tonnes of sorghum. Some of these exports are expected to be through cross border trade. In particular, the domestic surplus of coarse grains is likely to be exported in some neighbouring countries, especially the Sudan and South Sudan that experienced very low production levels in 2011.

- Food use is estimated at 17.46 million tonnes, using CSA projected 2012 mid-year population of 84.3 million persons plus an estimated 422 000 people hosted in refugee camps (mainly from Somalia) and a per capita average consumption at 206 kg of cereals and pulses. Per-capita consumption comprises 53 kg of maize, 41 kg of wheat, 37 kg of teff, 34.5 kg of sorghum, 18 kg of barley, 6.5 kg of millet, 14.5 kg of pulses and 1.5 kg of other cereal crops.
- Closing stocks are forecast at about 400 000 tonnes.
- The cereal import requirement in 2012 is forecast at about 835 000 tonnes of wheat. Based on last years' imports and given the sustained economic growth in Ethiopia, the Mission estimates that the country would be able to import commercially about 500 000 tonnes of wheat, leaving an estimated gap of about 335 000 tonnes.

Table 11: National grain supply/demand balance, January-December 2012 ('000 tonnes)

	Teff	Wheat	Barley	Maize	Sorghum	Finger Millet	Others	Total cereals	Pulses	Cereals & Pulses
Domestic availability	3 870	3 471	1 965	6 463	4 153	724	182	20 828	2 133	22 961
Opening stocks	20	65	20	30	20	10	10	175	30	205
Total production	3 850	3 406	1 945	6 433	4 133	714	172	20 653	2 103	22 756
2011 Meher ^{1/}	3 803	3 328	1 820	5 850	4 089	711	158	19 758	2 002	21 760
2012 Belg	48	78	125	583	45	3	14	896	101	997
Total utilization	3 870	4 306	1 965	6 463	4 153	724	182	21 663	2 133	23 796
Food use	3 135	3 474	1 525	4 491	2 924	551	127	16 228	1 229	17 457
Seed use	100	225	130	84	28	36	6	609	163	772
Feed use			50	230	320	27		652		652
Losses & other uses	193	511	194	1 287	620	86	17	2 907	315	3 223
Comm. & informal exports	400			300	200		18	918	375	1 293
Closing stocks	42	70	64	71	62	25	14	348	51	399
Estimated import requirement	0	-835	0	0	0	0	0	-835	0	-835
Anticipated commercial imports		500						500		500
Estimated gap	0	335	0	0	0	0	0	335	0	335

^{1/} Estimates for the 2011 *meher* season include both peasant holdings and commercial sector.

5. **FOOD SECURITY SITUATION**

5.1 **Methodology**

The food security section is based on findings of the multi-agency and multi-sector *meher* assessment conducted in November/December 2011 and a review of other secondary information sources, including market price provided by EGTE and WFP and nutrition data by ENCU. Information was triangulated during the debriefing sessions with the seven crop assessment teams, key informant interviews at Addis Ababa level, interviews with retailers and wholesalers at the “Merkato” cereal and vegetables markets and several field visits to rural communities and markets in the Oromia region.

The objective of the annual *meher* assessment is to evaluate the outcome of the *meher/deyr* season and its impacts on livelihood security in cropping and pastoral areas, and to determine the areas and number of people that are likely to require relief assistance in the first six months of 2012. The method applied is based on the Household Economy Approach (HEA) using the Livelihood Impact Analysis spreadsheet (LIAS) to estimate relief food requirements. Based on key informant interviews at *woreda* level, impacts of shocks on different wealth groups and their coping mechanisms are assessed by comparing the current situation with the baseline year. The baseline year differs from region to region ranging from 2005 and 2009.

The 2011 *meher* assessment covered all 9 regions and one administrative council; only Addis Ababa was excluded. Data collection involved 138 staff organized in 22 teams from Government (DRMFSS, MoWE, NMA, DPFSCB, RWB, MoWE); donors (USAID); UN agencies (WFP, OCHA, FAO, WHO, UNICEF, UNFP); Non-governmental organizations (SC-UK, MSF-Holland and *Belgium*, Plan International, CARE, IMC, COOPI, World Vision, IRC, Mercy Corps); FEWS NET and FHI/E.

The mission team had the opportunity to participate in the training of trainers (TOT) workshop organized in Addis Ababa and visited one data collection team in the field. While the theory and approach of the assessment methodology is generally sound, teams are facing time constraints to validate and triangulate information provided by key informants at *woreda* level. It is therefore recommended to provide teams with more time or staff to interview traders at market level and conduct focus group discussions with affected community members.

Based on the assessment findings, the government prepared the Humanitarian Requirements Document (HRD) which was released in January 2012.⁵ This early release date is commendable as it allows government and partners to start their programmatic planning earlier on than in previous years.

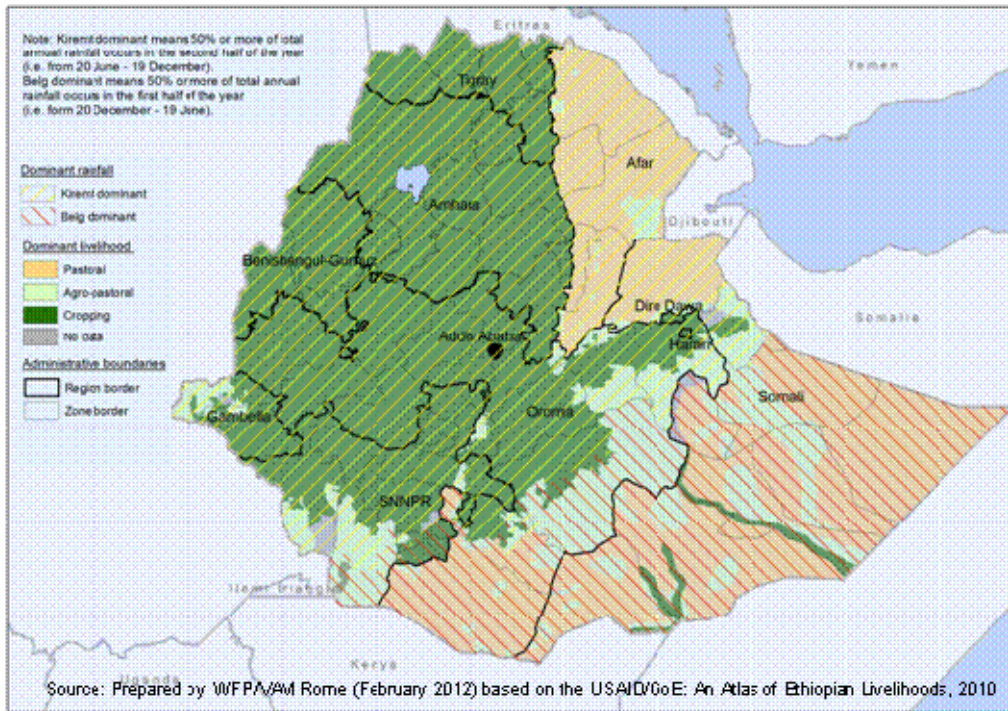
5.2 **Household food security**

Ethiopia is characterized by a complex livelihoods system due to its diverse topography, seasonality, and multi-ethnicity. The vast majority of the population, around 84 percent, live in rural areas. Altitude variation is extreme and there are two major weather systems, giving rise to multiple seasonal cycles in different parts of the country (see Annex 1). Altitude varies between 125m and 4 620m above sea level in the central highlands. The seasons in Ethiopia are determined by the Inter-Tropical Convergence Zone (ITCZ) which covers the north-west of the country – commonly referred to as the dominantly *kiremt* rain depending areas, and the Indian Ocean system, which covers the south-east – referred to as the dominantly *belg* dependent areas. The most basic division in terms of rural livelihoods is between crop farmers, agro-pastoralists and pastoralists (see Map 1). But within each of these general categories, local factors apply resulting in 175 distinctive livelihood zones.

Markets play an important role for many households in Ethiopia to access food and sell surplus. Based on the HEA baseline studies, it was estimated that about 48 percent of rural households are net-buyers. The western half of the country and south-central Oromia is generally a surplus area, while pastoral areas but also parts of the north-east, east and central cropping areas in the central highlights are generally deficit areas. In case of rising food prices, urban households and net-buying households in rural areas are particularly vulnerable.

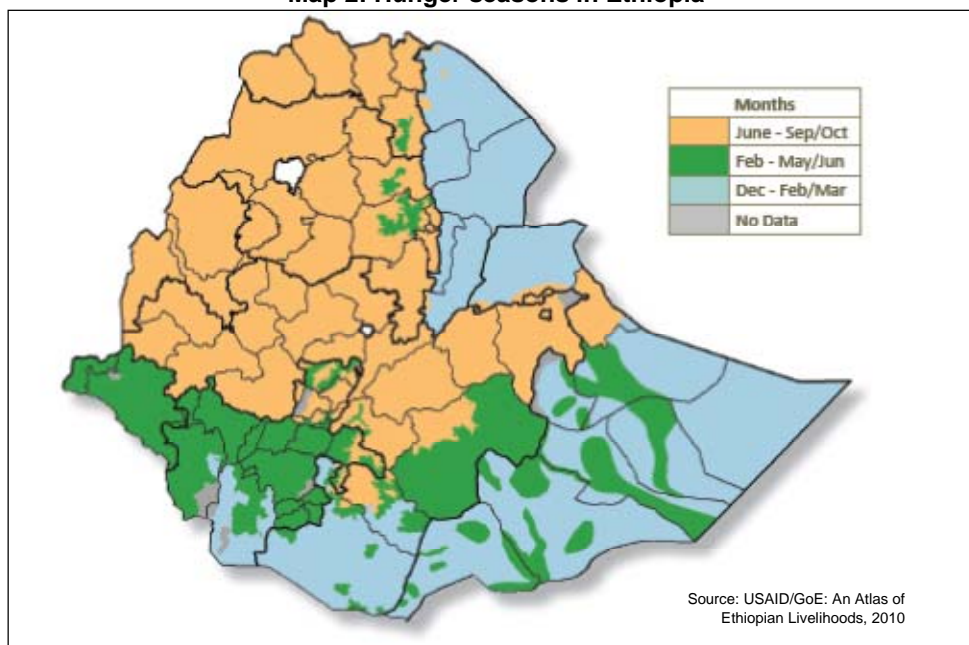
⁵ Government of Ethiopia: Humanitarian Requirements 2012 – Joint Government and Humanitarian Partners' Document. Addis Ababa, January 2012.

Map 1: Main livelihood types and dominant rainfall pattern



There are generally three patterns of hunger seasons in the country (see Map 2). Where *meher* production dominates (the north, centre and east of the country), the main hunger season is typically in the pre-harvest season from June to September/October. In the *belg*-producing areas (mainly in the south), the main hunger season is from February to May/June. For pastoral livelihood zones, the main hunger season lasts from December to February/March. Livestock generally give birth twice a year in pastoral areas, at the beginning of the *deyr/hagya* (October) and the *gu* (March) rains. The increase in milk supply and improved condition of animals signals the end of the main annual hunger season.

Map 2: Hunger seasons in Ethiopia



Ethiopia is highly prone to recurrent natural hazards. Across the country, an estimated 7.6 million (or 11 percent of the rural population) are considered chronically food insecure, meaning each year they are relying on resource transfers to meet their minimal food requirements. In addition, over the past four years between

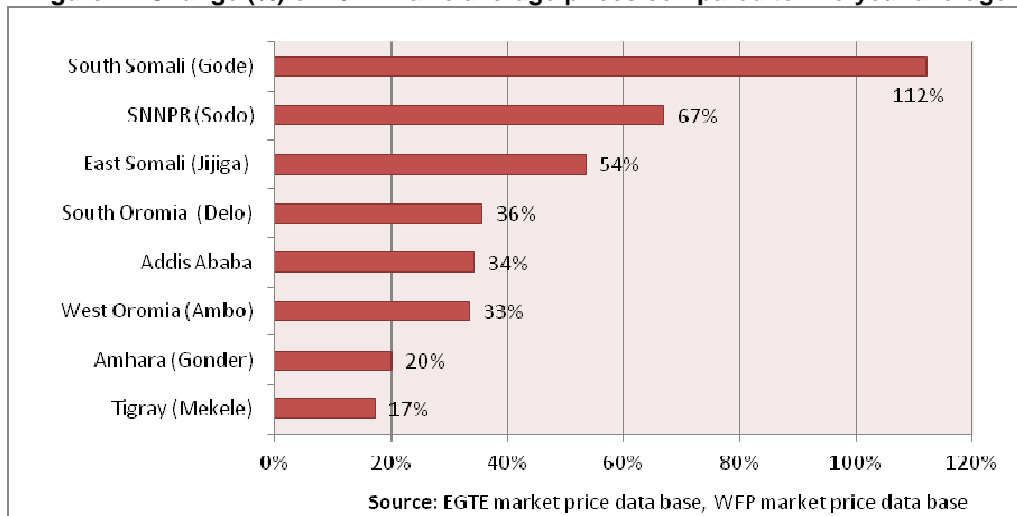
2.2 and 6.4 million additional people were food-insecure or not able to meet their food needs in the short term due to transitional factors. They are temporarily dependent on relief food assistance. The main shock in most parts of the country is lack of/erratic rainfall. Other shocks include localized floods, crop and livestock diseases, crop pests and frost/hail.

5.2.1 Food security trends in 2011

The poor *belg* and *gu* rainy seasons (March to June/July) caused by La Niña during the first half of 2011 heavily affected the *belg* dominant areas in the north-east, south and south-eastern parts of the country including eastern Amhara, southern Tigray, Somali, parts of Oromia and SNNPR regions. The rainfall was either delayed or failed completely in some areas. Where possible, households coped by substituting long-cycle with short cycle crops or switched from bi-modal systems to uni-modal systems which led to delayed harvests, increased food prices and extended hunger seasons. Worst affected were agro-pastoralists and pastoralists in the south and south-east. Pasture and water conditions were extremely poor due two consecutive poor seasons: the *deyr* season (short rains from October to November in Somali region) in 2010 and the *gu* season (main rains from March to June in Somali region) in 2011.

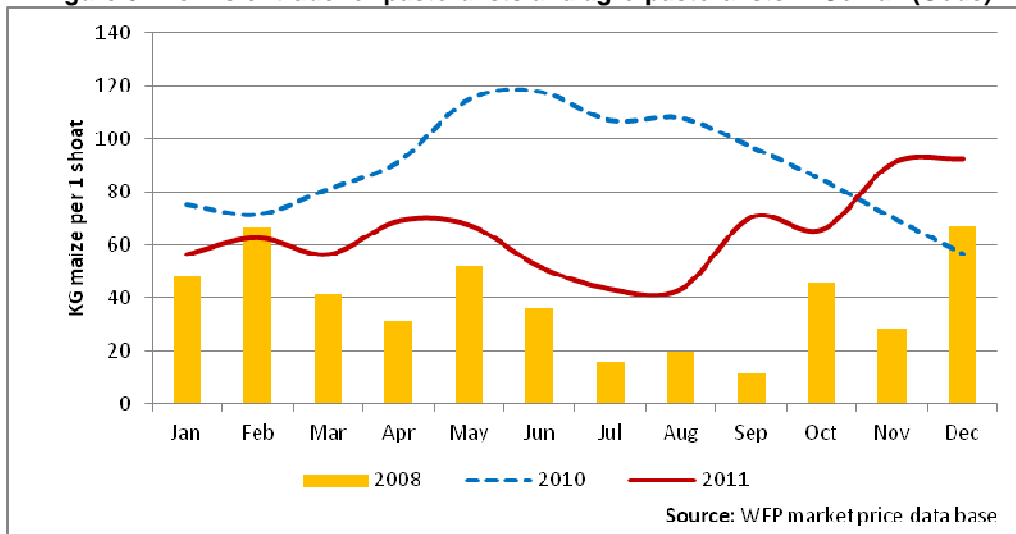
As a result of decreased local supply and increased demand combined with other macro-economic factors described in Section 4, food prices increased across Ethiopia (see also Annex 2). Not surprisingly, price increases were more severe in areas directly affected by the drought, in particular Somali, SNNPR and the south-eastern zones of Oromia. Increases were less pronounced in the northern and central highlights (see Figure 7).

Figure 7 - Change (%) of 2011 maize average prices compared to five-year average



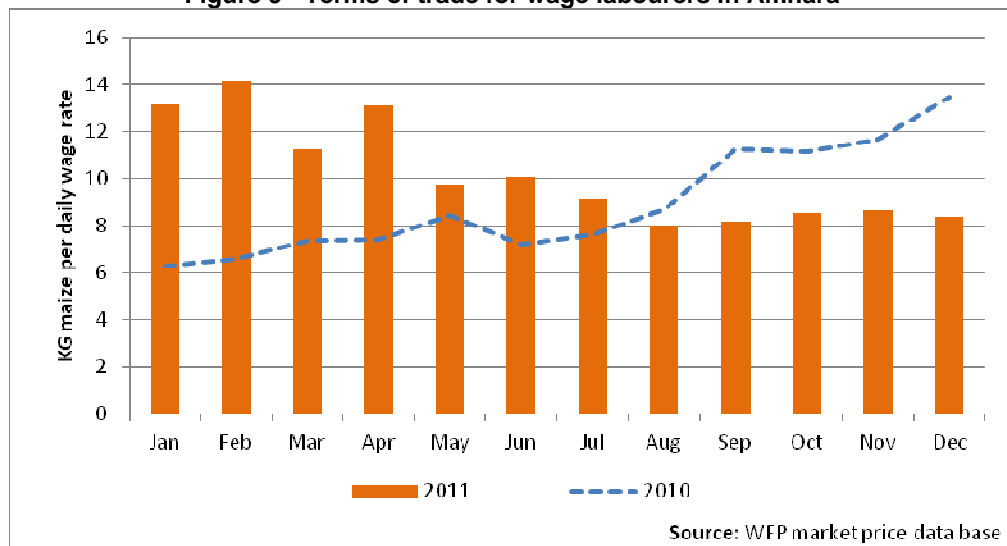
Terms of trade present the purchasing power of a household, for example the quantity of cereal a pastoral household can buy if it sells one goat on the market. Terms of trade of pastoralists and agro-pastoralists started to deteriorate in Gode (Somali region) since August 2010 (see Figure 8). The trend continued during 2011 and only improved from September onwards with the early onset of the *deyr/hagya* rains. However, terms of trade remained more favourable compared to 2008 when pastoral livelihood groups were heavily affected by the global price hike. Other markets in the pastoral areas in south and south-eastern Ethiopia followed similar trends.

Figure 8 - Terms of trade for pastoralists and agro-pastoralists in Somali (Gode)



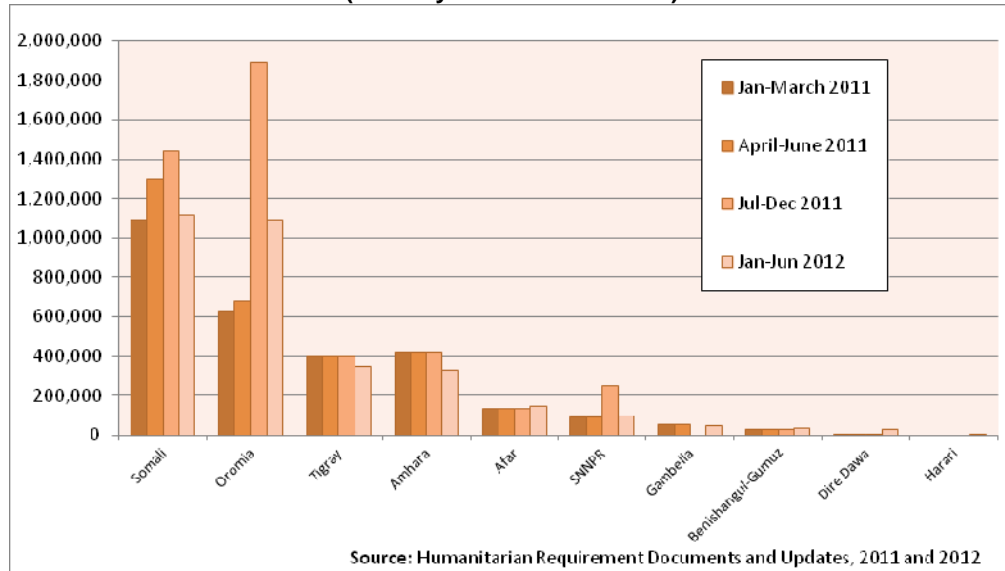
Terms of trade for wage labourers in Amhara, a region where daily wage labour is a major income source, improved throughout 2010 and then declined in the second and third quarter of 2011 (see Figure 9). During the fourth quarter, the situation stabilized due to the generally good *mehar* harvest which contributed to increased labour opportunities in the agricultural sector and reduced cereal prices on local markets. The trend in Tigray region was very similar.

Figure 9 - Terms of trade for wage labourers in Amhara



As a result of the drought, relief requirements increased from 2.84 million beneficiaries from January to March, to 3.11 million from April to June, to 4.57 million from July to December 2011. Despite the severity, the situation never reached famine levels as compared to neighbouring Somalia due to the existing productive safety net programme (PSNP) and enhanced relief interventions by the government and its partners. In Somali, the number of people in need of assistance increased by one-third during the second half of the year. In Oromia and SNNPR, the number of people in need of assistance almost tripled between the second and third quarter (see Figure 10).

Figure 10 - Number of persons in need of relief food assistance (January 2011 to June 2012)



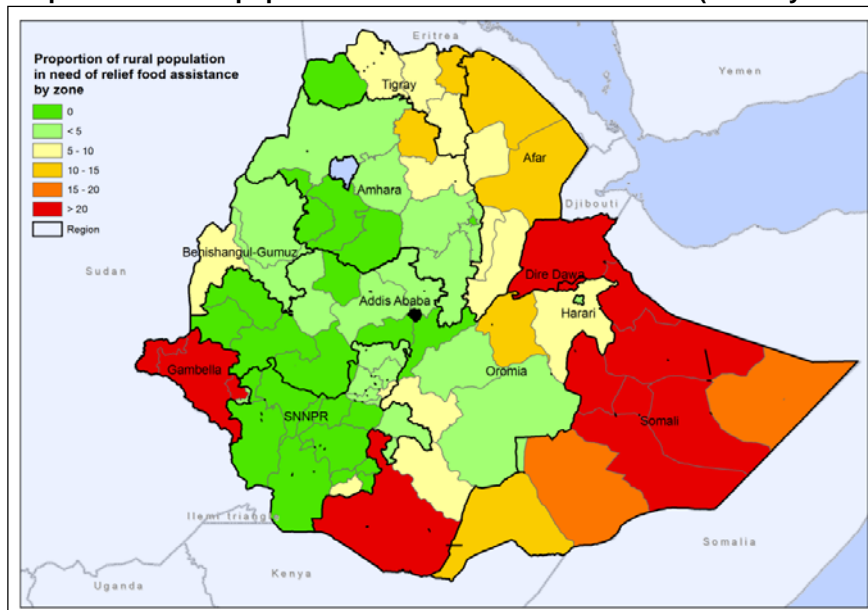
5.2.2 Food security outlook for 2012

The 2011 *deyr* rains from October to November arrived early and alleviated the situation in the Somali region. This was followed by the annual dry season which usually last from December to February/March. With the late onset of the March *gu* rainy season by several weeks, the hunger season is expected to last longer compared to a normal year.

Most of the crop dependent areas across the country benefited from average to above average *kiremt* rains (June to September) which lead to a favourable *meher* harvest (October to December) with some exceptions on the eastern lowlands.

Overall, the number of people in need of food assistance during the first half of 2012 is projected at 3.24 million. This reflects a 29 percent decrease compared to the second half of 2011. Exceptions include Afar, Dire Dawa, Harari, Gambella and Benishangul-Gumuz where the number of people in need of relief assistance has slightly increased compared to the previous semester.

Map 3: Proportion of rural population in need of relief assistance (January to June 2012)



Source: Prepared by WFP/VAM Rome based on DRMFS report: Food Supply Prospects for the Year 2012, January 2012.

In terms of proportions, households are more likely to be dependent on relief assistance in Somali, Dire Wawa and Gambella, followed by Afar and Tigray (see Map 3). Main causes include lingering impacts of the 2010/11 droughts and weather adversities during the *meher* season which affected localized areas. In absolute terms, the majority of people in need are in Somali (34.4 percent), followed by Oromia (33.7 percent), Tigray (10.7 percent), Amhara (10.2 percent), Afar (4.5 percent) and SNNPR (3 percent).

FOOD SECURITY PROSPECTS FOR JANUARY TO JUNE 2012 BY REGION

Somali: Food security for agro-pastoralist and pastoralists is expected to improve in the second quarter of 2012 if the *gu* rains will start timely; however 26.1 percent of the population are expected to remain in need of relief assistance in the first half of 2012 (or 1.12 million people). The *deyr* and *karan* rains in 2011 improved pasture and water condition in most parts of the region. As a result, livestock body conditions and conceptions have slowly improved following a period of poor livestock reproduction due to two seasons of poor rainfall. After the dry season in the first quarter of 2012, the number of goats and sheep and access to milk is expected to increase with the kidding period in the second quarter. The calving period of larger ruminants will only take place in the following rainy season around September/October 2012 but this will depend on the performance of the *gu* rainy season. Full livestock recovery will take two to three normal seasons. Staple cereal availability is expected to be constrained by the previous drought conditions and prices are expected to remain high throughout 2012. Livestock prices are not matching to the rising cereal prices leading to continued unfavourable terms of trade for agro-pastoralists and pastoralists.

Oromia: Across the region, 4.1 percent of the population will remain in need of relief assistance in the first half of 2012 (or 1.09 million people). Food security is expected to improve in most Western and Central parts of the region following normal to above normal 2011 *meher/kiremt* rains, scaling-up of agricultural programmes and strengthened extension services. However, the food security situation in the *belg* producing, agro-pastoral and pastoral south, south-eastern and eastern lowlands is expected to deteriorate compared to 2011 mainly due to the late onset, early withdrawal and poor performance of the 2011 *hagya/meher* rains and poor livestock body conditions. Worst affected are the lowlands of Borena, Bale, Guji, East and West Harerghe zones.

Tigray: The overall food security situation in Tigray is expected to remain stable compared to last year, with 8.9 percent of the population in need of relief assistance in 2012 representing 346 000 people. Across zones, the situation will deteriorate in the south and south-eastern zones due to poor performance of the 2011 *azmera* and *tsidia* rains caused by localized dry spells, hailstorms and other weather adversities.

Amhara: In most areas, the food security situation will remain stable with only 2 percent of the population in need of relief assistance during the first half of 2012 (or 332 000 people). Exceptions are the lowlands of Wag Hamira, North and South Wollo and pocket areas of south-eastern parts of the region as a result of *meher* production losses, reduced income from agricultural wage labour and reduced labour migration opportunities.

Afar: With 10.6 percent, Afar has a slightly higher proportion of people in need of relief assistance compared to 2011 (or 145 000 people). This is related to the cumulative effects of poor *sugum* and *karma* rains in 2011. The region is also increasingly affected by chronic factors such as environmental degradation, recurrent droughts, limited access to infrastructure and poor health and veterinary services. An early movement of livestock to the dry season grazing areas has been reported and distress sales of livestock may occur to cover food purchases. Availability of milk is insufficient in many areas and despite generally increasing prices for livestock, terms of trade remain unfavourable for pastoralists. Alternative income sources, including salt mining, casual labour and remittances, have not been able to compensate for the experienced losses in the agriculture and livestock sector.

SNNPR: According to the multi-agency *meher* assessment, less than 1 percent of the population will be in need of relief assistance in 2012 representing 98 000 people though this figure may have to be revisited due to reported delay of the onset of the 2012 rainy season. Also the December-January *sapia* rains have been reported as very poor which could have an impact on the performance of sweet potatoes, an important food source to fill the hunger season gap in the central parts of SNNPR. If the production fails, figure of people in need of assistance should be reviewed.

Gambella: The food security situation has remained stable compared to 2011 with 18.8 percent of the population in need of relief assistance in 2012 representing 48 000 people. Only in some pocket areas, the situation is expected to deteriorate due to various weather adversities including hailstorms, localized dry spells and extended and above average rainfall at the end of the rainy season.

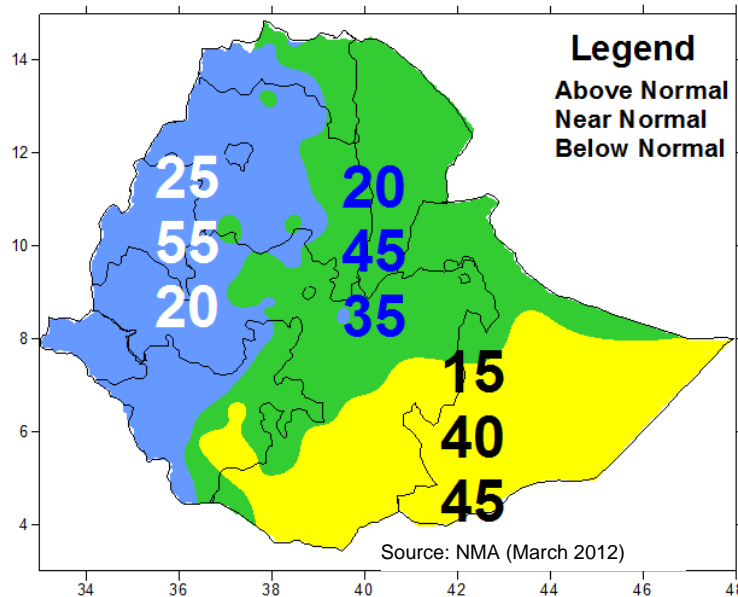
Benishangul-Gumuz: The food security situation is relatively stable compared to 2011 with 5.2 percent of the population in need of relief food assistance (or 33 000 people). Some areas were affected by weather adversities and refugee influx from Sudan creating pressure on limited resources.

Dire Wawa: The number of people in need of relief food assistance has increased to 23.5 percent in 2012 representing 29 000 people. This is related to poor harvest in pocket areas where moisture stress, long dry spells, frost and diseases have caused considerable damage to long cycle and perennial crops.

Harari: The food security situation is generally good due to a favourable *meher* harvest. Few pockets were affected by late onset, dry spells and early withdrawal of *kiremt* rains. As a result, 4.3 percent of the population require relief assistance (or 4 000 people).

For the 2012 *belg* season, food security in the pastoral and agro-pastoral areas of Ethiopia are likely to deteriorate. NMA projects that there is a 45 percent probability that rainfall will be below normal in large parts of Somali and southern Oromia regions (see Map 4).

**Map 4: Rainfall probability for Belg 2012 according to NMA
Rainfall Tercile Probability for Belg 2012**



The current climate outlook for the remaining months of 2012 is as follows:

- Erratic onset and near normal cessation are expected over much portions of the country.
- Inconsistent rainfall distribution and amount expected over the entire *belg* season.
- Below normal to near normal rains are expected over much of eastern half and central portions of the country moreover, south-eastern Ethiopia will have below normal rain. Close to normal rainfall is anticipated over western and south-western parts of the country.

In terms of impact, it is expected that western and south-western Ethiopia will expect a probability of close to normal availability of moisture which is conducive for agricultural activities and planting of long cycle crops. Much of the eastern half and central portion of the country is expected to experience below normal to near normal moisture conditions with minimal impact on agricultural productivity. Finally, south-eastern Ethiopia is expected to experience below normal rainfall impacting negatively on the availability of pasture and water conditions in pastoral and agro-pastoral areas. Though *belg/gu/ganna* rains are expected to be better compared to 2011, it would be the second consecutive poor season. Given the impacts of food insecurity and famine during 2011 on human health and household livelihoods, and the likelihood of a poor March-May season, humanitarian partners have been called upon to implement programmes to protect livelihoods and household food consumption across the eastern Horn of Africa region including the pastoral and *belg*-producing areas in south-eastern and south-central Ethiopia (FEWSNet, April 2012).

5.3 Nutrition situation

5.3.1 Longer-term nutrition trends

The economic growth combined with investments in rural infrastructure and establishment of the national safety net programme, led to a reduction in the prevalence of malnutrition over the last decade. However, according to preliminary findings of the Demographic and Health Survey conducted in 2010, 44.4 percent of children nationwide remained stunted or too short for their age, a condition reflecting the cumulative effect of chronic malnutrition. Chronic malnutrition is more pronounced in rural areas, where 46.2 percent of children are stunted compared to only 31.2 percent in urban areas. Rates above 40 percent are considered to be critical by the World Health Organization and were found in 6 out of 11 regions in Ethiopia. The most affected regions are Amhara, Tigray and Afar with rates above 50 percent. Table 12 provides an overview by region but numbers have to be treated with caution because the number of children measured was limited in several regions, notably in Gambella, Harari and Dire Dawa.

Table 12: Prevalence of malnutrition and anaemia in 2010

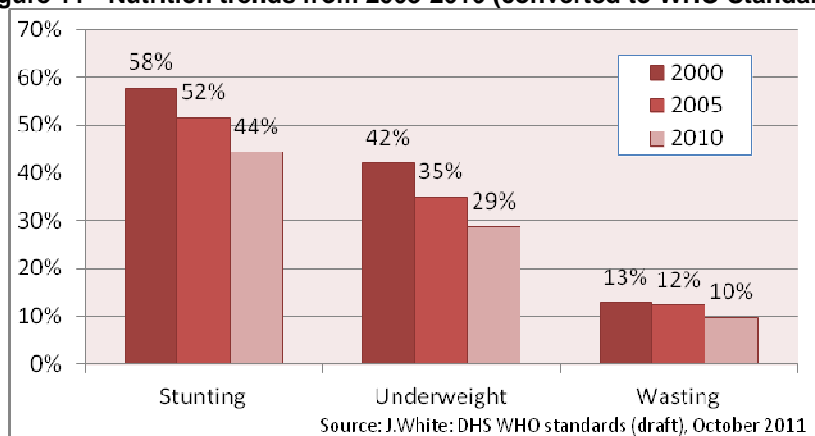
	Nutritional status of children				Anaemia among children and women			
	Number of children 0-59 months	Stunting (<-2 SD) %	Wasting (<-2 SD) %	Under-weight (<-2 SD) %	Number of children 6-59 months	Anaemic %	Number of women (15-49 years)	Anaemic %
Tigray	733	51.4	10.3	35.1	661	37.5	1 077	12.4
Afar	105	50.2	19.5	40.2	95	74.7	141	34.8
Amhara	2 325	52.0	9.9	33.4	2 148	35.1	4 219	16.6
Oromia	4 723	41.4	9.7	26.0	4 199	51.7	5 834	19.2
Somali	278	33.0	22.2	33.5	241	68.7	292	44.0
Benishangul-Gumuz	123	48.6	9.9	31.9	111	46.5	167	19.1
SNNPR	2 311	44.1	7.6	28.3	2 111	36.9	3 090	11.3
Gambella	33	27.3	12.5	20.7	29	50.9	67	19.4
Harari	23	29.8	9.1	21.5	19	55.5	43	19.4
Addis Ababa	194	22.0	4.6	6.4	155	33.2	788	9.3
Dire Dawa	35	36.3	12.3	27.6	30	62.9	63	28.3
Urban	1 342	31.5	5.7	16.3	1 139	35.2	3 621	10.9
Rural	9 541	46.2	10.2	30.4	8 661	45.4	12 161	18.3
Total	10 883	44.4	9.7	28.7	9 800	44.2	15 782	16.6
WHO standards:		Critical		Serious		Poor		Acceptable

Source: Ethiopia Demographic and Health Survey 2011, preliminary report.

Close to 10 percent of children are **wasted** or too thin for their height, a condition reflecting acute or recent nutritional deficit. Wasting is more common among boys than girls (11.1 percent versus 8.2 percent) and among the age groups from 0 to 18 months. Children in rural setting are double as likely to be wasted compared to children in urban settings. Across Ethiopia, Afar and Somali are the worst affected regions with prevalence above the emergency threshold of 15 percent.

To compare the nutrition situation with previous years, 2000 and 2005 data had to be converted from the old National Center for Health Statistics (NCHS) to the new WHO standards. Stunting and underweight decreased by more than 10 percentage points between 2000 and 2010, a remarkable improvement. Wasting fell slightly from 12.9 percent to 9.7 percent (see Figure 11).

Figure 11 - Nutrition trends from 2005-2010 (converted to WHO Standards)



Anaemia or iron deficiency is a serious concern for young children because it can result in impaired cognitive performance and future productivity. Across Ethiopia, 44.2 percent of children from 6-59 months are anaemic. Anaemia is worse in rural settings and shows alarming levels in Afar, Somali and Dire Wawa. A woman's nutritional status has important implications for her health status and her children. In 2010, 16.6

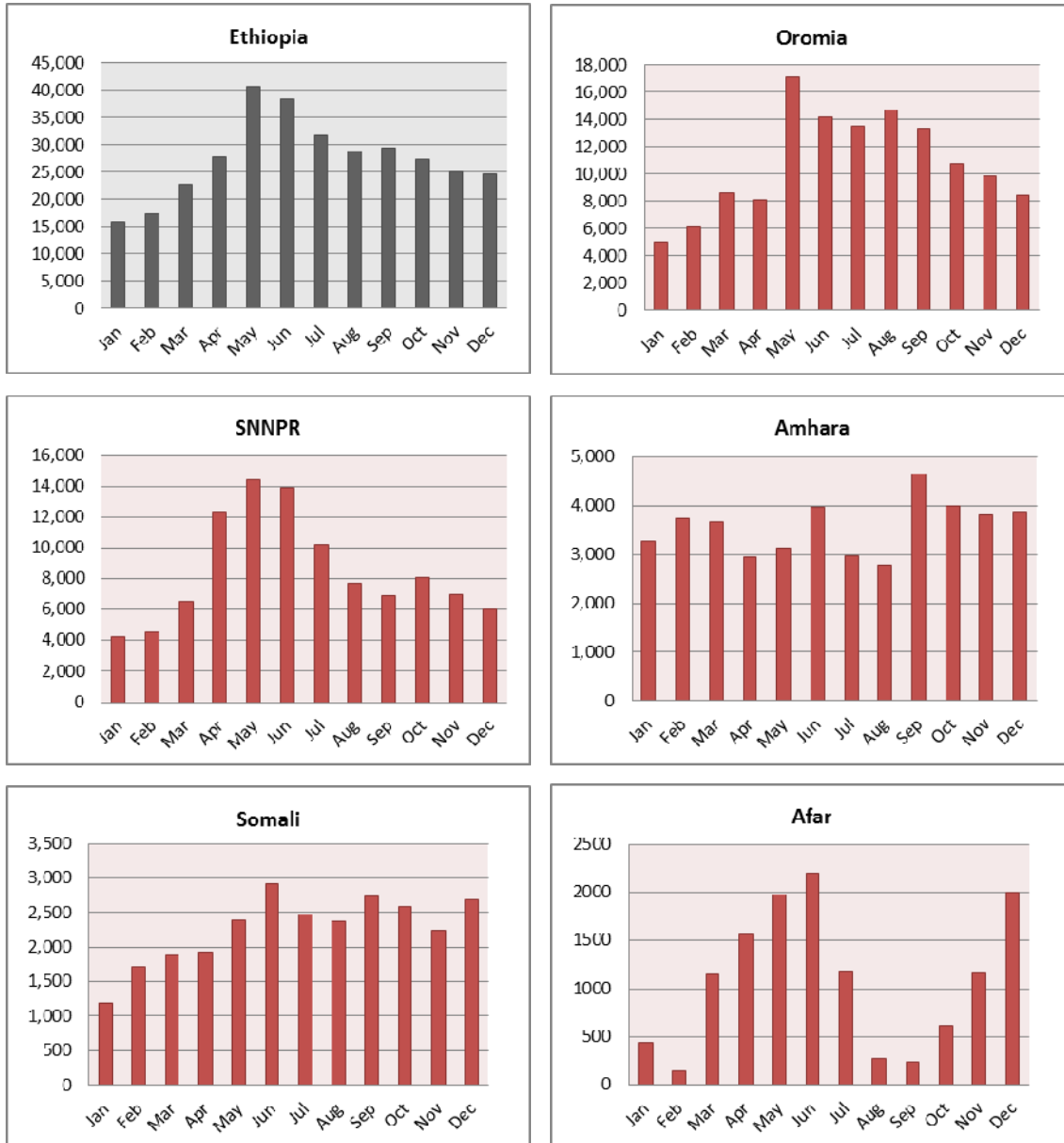
percent of women of reproductive age were anaemic. Compared to the previous DHS in 2005, anaemia levels have decreased by nearly 10 percentage points, a sign for a generally improving trend but further actions will be required to reduce anaemia to an acceptable level.

5.3.2 Nutrition trends in 2011

In 2011, 34 nutrition surveys were conducted by ENCU, DRMFSS and a range of NGOs in nutrition hotspot *woredas* across the country. The prevalence rates of global and severe malnutrition of children under-5 are presented in Annex 3. In 20 of the 34 assessed *woredas*, the prevalence of acute nutrition situation was between 10 percent and 15 percent which refers to a serious situation according to WHO. In five *woredas*, the rates were higher than the emergency threshold of 15 percent, while two additional *woredas* were very close to the emergency threshold. Out of these 7 *woredas* of concern, 4 are located in Somali, 2 in Oromia and 1 in Afar. The highest rates were observed among the resident population of Dolo Ado in June 2011 with a prevalence of acute malnutrition of more than 30 percent.

During 2011, about 329 535 admissions of children to therapeutic feeding programmes (TFP) were reported across Ethiopia according to data provided by UNICEF based on ENCU figures. At national level, the peak of admissions took place in May to June. In some regions, peaks in admission can be observed following the annual lean seasons (see Map 2). For example, in Oromia, admissions peaked from May to September and in SNNRP from April to June. In Somali where the hunger season in a normal year last from December to March, admissions were unseasonally high in the second half of 2011. In Afar with a similar hunger seasons as Somali, admission rates peaked from March to June and again from November to December (see Figure 12). By the end of the year, admissions countrywide were still 55 percent higher compared to the beginning of the year which could be partly related to lingering impacts of the drought but also the expansion of TFP sites and enhanced outreach at community level. By the end of November, the number of TFP sites across the country increased to 10 012, a 14 percent increase compared to June (HDR, 2012).

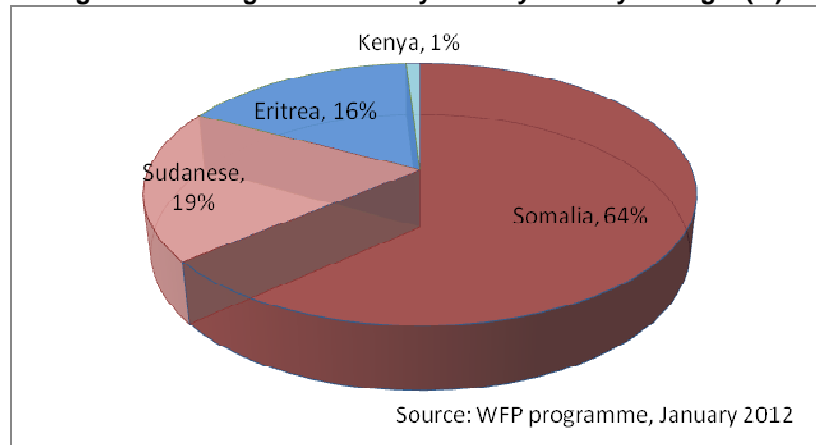
Figure 12 - Admission rates to TFP in 2011 by month (based on ENCU)



5.4 Food and nutrition situation in refugee camps

Ethiopia has been hosting refugees from neighbouring countries for more than three decades with a steady and significant increase in 2011. The new influx has largely been from southern Somalia as a result of conflict and famine. Across the Somali region, there are currently 8 refugee camps hosting a total population of about 185 500 refugees from Somalia. While in 2008 there were no refugee camps in Dolo Ado, in 2011, there were 5 camps out of which 4 had reached full capacity. The number of new arrivals peaked in June/July 2011 with around 2 000 new arrivals per day. By November the figure of new arrivals decreased substantially to around 100 per day.

Figure 13 - Refugees in January 2012 by country of origin (%)



Escalated conflict and insecurity in the Blue Nile State of Sudan since early September 2011 forced families to flee. As of early 2012, UNHCR estimated that over 28 000 Sudanese have crossed the border into Gambella and Benishangul-Gumuz regions. There has also been an increase of Eritrean refugees who are escaping the country's deteriorating economic and social conditions and living in camps in Afar and Tigray regions. Finally, refugees from Kenya have moved to the Oromia region.

Refugees are generally dependent on external assistance as they are not supposed to find employment outside the camps. The last joint surveys conducted by the Government's Administration for Refugees and Returnees Affairs (ARRA) and UNHCR covering all camps in 2010 showed that global acute malnutrition rates (GAM) was below 10 percent except for in Dolo Ado. A survey carried out in March/April 2011, reports GAM rates of up to 33 percent in Dolo Ado camps. Rapid follow-up assessments in mid-2011 indicated even more alarming levels among new arriving refugees. Since then, the nutrition situation has somewhat improved due to the ongoing and sustained relief efforts in the area of food, water, health and shelter, though GAM rates remain above the 15 percent emergency threshold.

Preliminary findings of a recent Food Security and Post-distribution Monitoring rapid assessment conducted by UNHCR and WFP in end 2011/early 2012 concluded that refugee households in Dolo Ado are largely dependent on food assistance to access food. Despite a general food ration comprised of cereals, supercereal, pluses, vegetable oil, sugar and salt which is supposed to cover the daily requirements (plus cost of milling), 12 percent of refugee households have poor and 12 percent have borderline food consumption and dietary diversity. Though further analysis is required, there is some indication that households decide to sell parts of their rations to meet non-food needs or buy other food commodities. As wheat is not the preferred commodity, many refugees sell or exchange it to buy other cereals such as rice or pasta. It is therefore recommended to switch to more preferred food commodities. In addition, a market study could be conducted to assess the feasibility of introducing a cash component to meet non-food needs and allow refugees to diversify their diets.

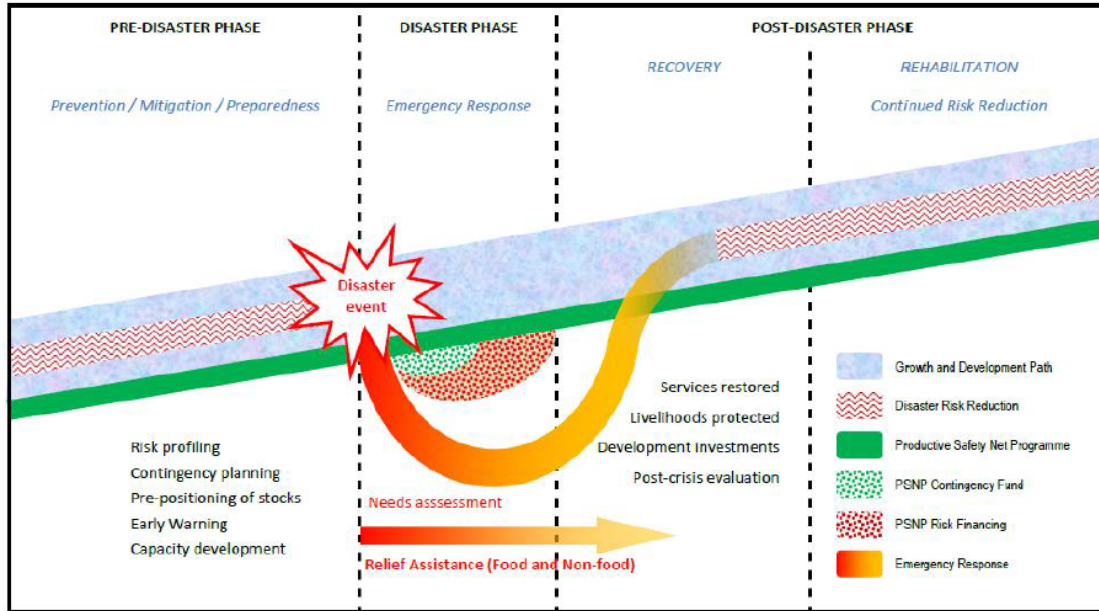
5.5 Food assistance programmes and requirements for 2012

5.5.1 Relief assistance and scenarios

One of the major changes that have taken place in Ethiopia's relief response in the past 10 years is the shift from an ad hoc relief operation to a more holistic approach of Disaster Risk Management (DRM) consisting of 6 pillars: prevention, mitigation, preparedness response, recovery and rehabilitation. Figure 18 presents the role of relief food assistance within the broader framework of the Ethiopia DRM Policy. The Productive

Safety Net programme (PSNP) aims to provide predictable food and income transfers to chronically food insecure households in selected vulnerable areas (see also Section 2.2). When a disaster event strikes, the first response in PSNP *woredas* is to use regional contingency funds to meet additional transitional needs. A Risk Financing mechanism can cover additional temporary needs if necessary. An emergency relief operation will only be launched in *woredas* where the PSNP is not operational and where needs exceed the risk financing ceiling.

Figure 14 - Relief Assistance in the Disaster Risk Management Framework



Source: DRMFS: National Guidelines on Targeting Relief Food Assistance, August 2011.

According to the national guidelines on targeting relief food assistance (2011), relief interventions are targeted at people whose food access is temporarily reduced by a shock or a slow-onset disaster and who are unable to maintain an adequate nutritional intake or are able to maintain an adequate nutritional intake only by resorting to unacceptable or damaging coping strategies.

Up to now, the multi-agency needs assessment conducted before or during the *meher* harvest in November/December is the main source to determine the needs for relief assistance in the following year. The figures are updated by a second assessment in May/June to take into account the outcome of the *belg* harvest and the *gu* rains in the southern pastoral areas. If necessary, mid-season and ad-hoc assessments are conducted in addition to the two main assessments.

Over the past years, the number of people in need of relief assistance was adjusted upwards in 2008, 2009 and 2011 following mid-season and the *belg* assessments. Only in 2010, the number reduced from the first to second half of the year (see Figure 15).

Based on the Humanitarian Requirement Document that was released in January 2012, 3.24 million Ethiopians will be in need of relief assistance from January to June 2012. In trend in the second half of 2012 will depend on the outcome of the *belg/gu/ganna* rains. If the likely scenario of below average rainfall prevails in the pastoral and agro-pastoral areas in south-eastern Ethiopia, 1.4 million people may require relief support beyond June 2012 based on the needs assessed during the 2011 *belg* assessment in affected areas (see Map 4). An additional 2.9 million people could be risk if also the central parts and eastern half of the country are affected by below average rainfall. The figure will be updated following the *belg* assessment towards the end of the second quarter in 2012.

Figure 15 - Number of people in need of relief (in million)



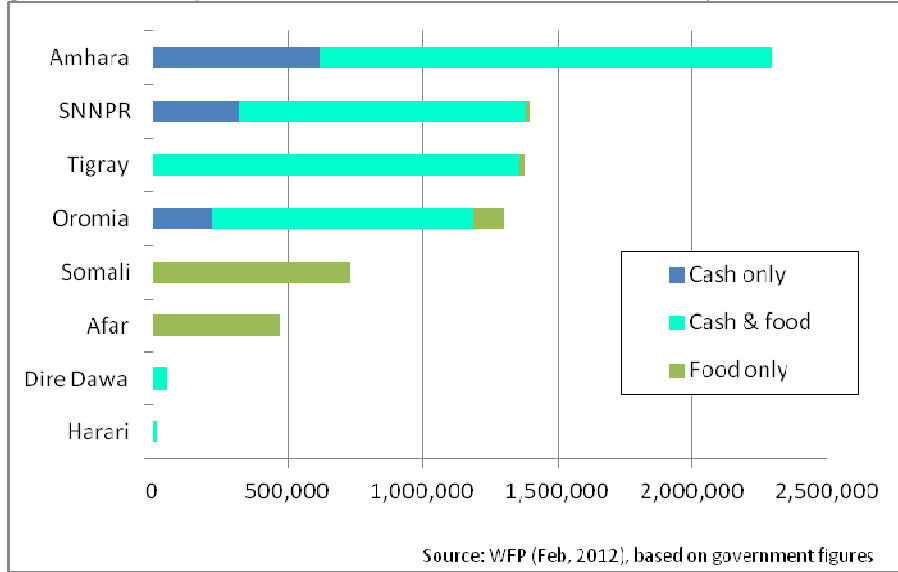
5.5.2 Food assistance for chronic food insecure

The Productive Social Safety Net Programme (PSNP) was launched in 2005 with the aim to remove chronically food insecure households who have been receiving food assistance year after year from the relief registers. The scheme is based on a partnership between the Government of Ethiopia and a group of donors. Donors providing cash have pooled their financing in a World Bank multi-donor trust fund that provides direct budgetary support to the government. Donors providing food channel their food separately, although the food remains within the unified budgetary framework for a single government-led programme coordinated by the Food Security Coordination Directorate (FSCD) of the Ministry of Agriculture and Rural Development. Its primary design feature is its provision of multi-annual, predictable assistance to an identified group of the chronically food-insecure, to help them manage risks and overcome their food insecurity. This includes using recently established forward-looking funding modalities, such as integrated risk financing mechanisms. PSNP clients receive predictable seasonal payments in the form of cash and/or food in exchange of work on community development project. For households without labour capacity, the support is unconditional (see also Section 2.2).

The funding levels have increased significantly since 2005. The PSNP budget for 2010-2014 is more than USD2.1 billion, representing an increase of about 50 percent from 2005-2009. Out of the total budget, 89 percent is allocated to cover actual transfers and associated costs, 7 percent to cover risk financing and 4 percent to provide institutional support.

The original geographic coverage of the PSNP was determined in 2004 based on the *woredas* that had received the most relief food assistance over the previous ten years. Since 2005 the number of beneficiaries increased by 58 percent. In 2012, the PSNP will target about 7.64 million rural people in eight regions, reaching 319 of the country's 710 *woredas* (see Figure 16). Out of these the majority will receive a mix of cash and food (67 percent), 18 percent will receive food only and 15 percent will receive cash only.

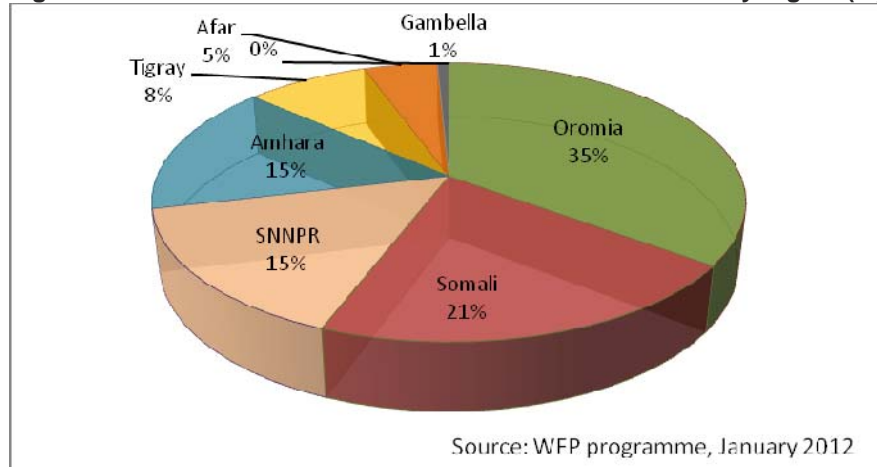
Figure 16 - PSNP planned number of beneficiaries for 2012 by transfer modality



5.5.3 Targeted supplementary feeding

The Targeted Supplementary Feeding (TSF) Programme provides fortified blended food and vegetable oil to children under-5 and pregnant and lactating women (PLW) suffering from moderate acute malnutrition identified through nutrition screening. Based on the HDR, 450 000 beneficiaries should be assisted from January to June 2012. It is estimated that out of these 100 000 will be PLW, the remaining are children under-5. The planned figures for the remaining year will be determined during the *belg* assessment in June/July, but WFP is currently working with a planning figure of 820 000 for the entire year. The majority of the planned beneficiaries are from Oromia, Somali and SNNPR.

Figure 17 - Planned number of beneficiaries of TSF for 2012 by region (%)



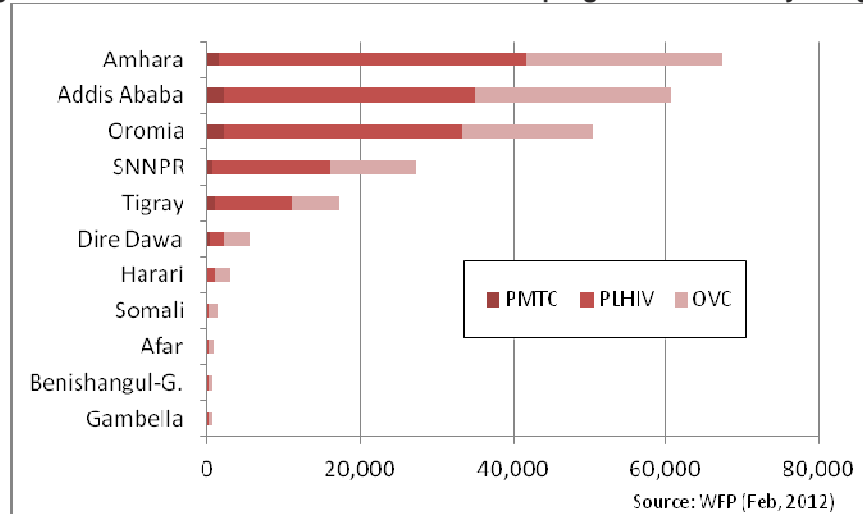
In the past, the same 168 *woredas* were targeted. From 2012 onwards, it is planned to assist hotspot priority one areas which are established based on the annual *meher* and *belg* assessments. This enhanced flexibility is possible due to the expansion of OTP which is now covering more than 10 000 sites across the country. The plan is to gradually integrate the TSF into the health system. In practice, instead of a quarterly or bi-annual screening campaign, health extension workers conduct monthly nutrition screening and refer moderate acute malnourished children and pregnant and lactating women to food distribution sites.

5.5.4 Access to HIV/AIDS care

The urban HIV/AIDS programme assists food insecure and malnourished people living with HIV and their households, including orphans and vulnerable children to improve access to HIV prevention, treatment, care and support. The programme consists of “Preventing Mother-to-child Transmission of HIV” (PMTCT), people living with HIV/AIDS (PLHIV), and orphans and other vulnerable children (OVC). There will be a total of

approximately 235 000 beneficiaries primarily in urban areas, out of which 29 percent are residing in Amhara, 26 percent in Addis Ababa, 21 percent in Oromia, 12 percent in SNNPR, 7 percent in Tigray and 2 percent in Dire Wawa. In 2012, the programme expanded into Afar, Benishangul-Gumuz, Gambella and Somali. All four regions generally lag behind in the provision of basic social services. Across Ethiopia, the PLHIV programme will cover 133 300 persons, the OVC, 94 000 persons and the PMTC about 8 000 persons. The 2012 expansion includes a larger voucher component. Within the PMTC programme, 71 percent of clients will receive vouchers instead of food rations; within the OVC programme, 48 percent; and within the PLHIV programme 5 percent.

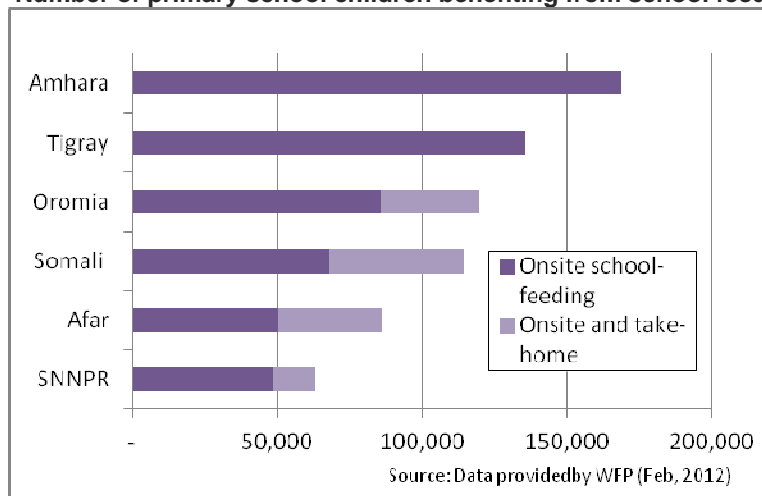
Figure 18 - Number of beneficiaries of HIV/AIDS programme in 2012 by category



5.5.5 School feeding

The food-for-education project uses a community-based approach to support formal education and child-friendly schools. In 2012, the Government of Ethiopia and WFP are planning to assist 1 185 schools across six regions: Afar, Amhara, Oromia, SNNPR, Somali and Tigray. Target group are children attending primary school from 6 to 14/15 years old. On-site feeding is provided to both boys and girls, while in pastoral areas in addition to onsite feeding, take-home rations are provided to girls to provide an incentive for their parents to keep girls at school. The total number of beneficiaries planned for 2012 are 688 500, out of these 81 percent will receive onsite feeding only and the remaining 19 percent both onsite and take-home rations.

Figure 19 - Number of primary school children benefiting from school feeding in 2012



5.5.6 Natural resource management

The “Managing Environmental Resources to Enable Transitions to more Sustainable livelihoods” (MERET) programme is a joint venture between the Ethiopian Government and WFP which aims at enhancing resilience of chronically food insecure communities through participation in environmental rehabilitation and

income generating activities. Activities include the rehabilitation of feeder roads, reforestation, restoration of springs and rainwater ponds and reconstruction of refurbishment of agricultural terraces. Participants are receiving an incentive of 3 kg of cereal per work day for a maximum of three months. The programme also provides tools and equipment as well as expert advice to build local capacities in sustainable land management technologies and practices. A total of 649 000 beneficiaries will benefit under this scheme in 2012.

5.5.7 Assistance to refugees

The current plan is to assist a maximum of about 434 900 refugees in 2012 who will receive general food rations. A maximum of 66 500 moderately acute malnourished children under 5 and adults – mainly pregnant and lactating women – will be benefiting from targeted supplementary feeding (TSF) programmes. The number will be higher during the first quarter and then stabilize during the remaining year. To address the high levels of malnutrition, a monthly maximum of 88 200 children under-5 will benefit from blanket feeding in the first quarter, for the remaining part of the year the number is expected to stabilize at around 21 300. Finally, a maximum of 60 900 children will be benefiting from school feeding.

5.5.8 Total food requirement for 2012

If all food assistance programmes are considered, Ethiopia requires a minimum of about 1 million tonnes of food in 2012 to assist about 13.7 million beneficiaries. In term of cereals, 929 000 tonnes would be required, which includes 82 000 tonnes of blended food such as corn-soya blend (CSB) and super cereal. The biggest portion in terms of cereal requirements will be required for the Productive Social Safety Net (45 percent), followed by relief (35 percent) and the refugee operation (10 percent). The remaining 10 percent will be allocated to the nutrition, HIV/AIDS and school-feeding programmes. Depending on the outcome of the 2012 *belg/gu/ganna* seasons, cereal requirements for the relief component may increase by 16 800 tonnes per one million people in need of relief assistance per month during the second half of 2012. The situation has to be closely monitored in the coming months. Food assistance requirements will be met through local purchases complimented by commercial imports and food aid.

Table 13: Summary of food assistance requirements for 2012

Programme		Beneficiaries	Cereal (tonnes)	Cereal based blended food (tonnes)	Pulses (tonnes)	Oil (tonnes)	Other food commodities & special food (tonnes)	Total tonnes	Total cereals (tonnes)
Relief	Jan to Jun	3 244 575	296 042	31 084	29,604	8 881	-	365 611	327 126
	<i>Jul to Dec</i>	<i>per each additional 1,000,000 beneficiaries and month</i>	15 207	1 597	1,521	456	-	18 781	16 804
Productive safety net (PSNP) ^{1/}		7 642 068	416 106	-	-	-	-	416 106	416 106
Nutrition	TSF - Jan to Jun	450 000	-	9 712	-	1 467	-	11 179	9 712
	TSF - Jul to Dec (planning figure)	370 000	-	7 985	-	1 207	-	9 192	7 985
HIV/AIDS		235 302	20 698	-	4,769	2 711	837	29 016	20 698
School-feeding		688 469	-	20 654	-	2 751	413	23 818	20 654
Natural resource management (MERET)		649 000	35 000	-	-	-	-	35 000	35 000
Refugees		434 900	78 498	13 013	7,268	4 579	8 598	111 956	91 511
TOTAL ^{2/}		13 714 314	895 684	87 629	46 575	23 076	9 848	1 062 813	983 313

^{1/} The beneficiary figure includes cash, food and cash & food recipients, information provided on tonnage only covers food component.

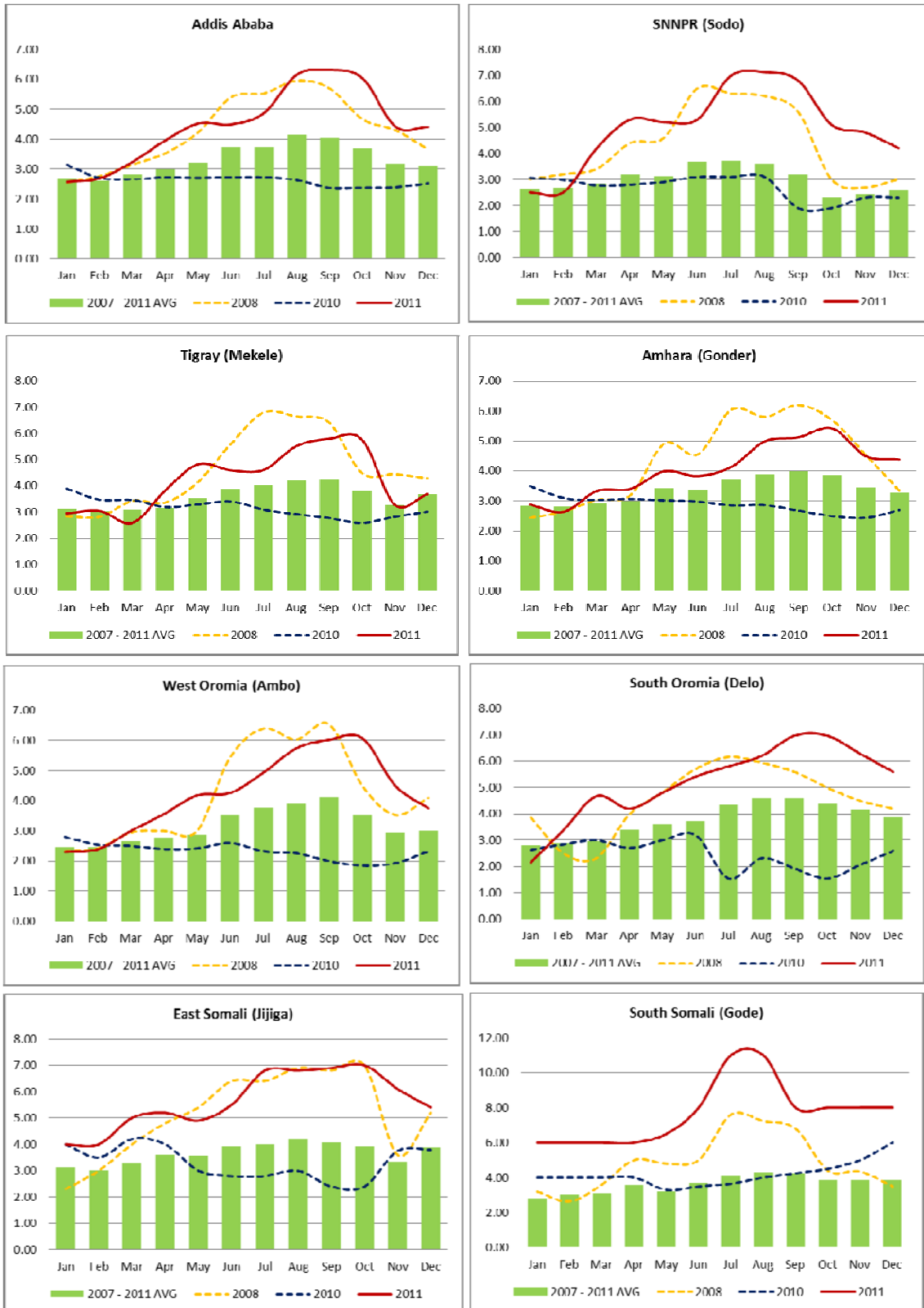
^{2/} The total number has to be revised when the number of people in need of relief assistance is confirmed following the *belg* assessment during the second quarter. For each 1 000 000 people/month, additional 16 800 tonnes cereals would be required.

Seasonal calendar of main rainy and dry seasons in Ethiopia

Season	Area	Jan			Feb			Mar			Apr			May			Jun			Jul			Aug			Sep			Oct			Nov			Dec				
		1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2
Meher/kiremt - main rains	Main rain in crop dependent areas																																						
Bega - dry season	Meher growing areas																																						
Belg - short rains	National																																						
Gu - main rains	Somali																																						
Jilal - dry season	Somali																																						
Deyr - short rains	Somali																																						
Hagaa - short dry season	Deyr rain receiving areas in Somali																																						
Karan - rains	Northern zone of Somali																																						
Ganna - rains	Borena/Guji zones																																						
Hagya - short rainy season	Borena zone, Oromia																																						
Azemera - rains	Tigray																																						
Tsidia - rains	Tigray																																						
Karma	Main rains in Afar																																						
Sugum - short rains	Afar (not more than 5 days)																																						
Sapia - rains	SNNPR																																						

Source: DRMFSS/MoA: Food Supply Prospects for the Year 2012, January 2012

Maize price trends in 2011 compared to 2008, 2010 and five-year average in selected markets



Source: EGTE and WFP market price database.

Nutrition survey results in hotspot woredas 2011

Region	Woreda	Month	Global acute malnutrition (<-2 SD)	GAM 95% confidence interval	Severe acute malnutrition (<-3 SD)	SAM 95% confidence interval
Somali	Cehrati	Dec 2010/Jan 2011	10.4%	CI (8.1- 12.7)	1.0%	CI (0.3-1.6)
	Moyale	Jan/Feb 2011	14.9%	CI (11.2-19.6)	0.8%	CI (0.3-2.1)
	Hudet	June 2011	16.7%	CI (13.60- 20.30)	1.1%	CI (0.6-2.0)
	Dolo Ado (residents)	June 2011	31.6%	CI (27.6-35.8)	3.2%	CI (2.1 - 4.8)
	Ayisha	Apr/May 2011	15.7%	CI (12.0 - 20.2)	0.3%	CI (0.1- 1.2)
SNNPR	East Badawocho	Jun/Jul 2011	7.1%	CI (5.4 - 9.4)	1.8%	CI (1.0-3.5)
	Hammer	May 2011	10.7%	CI (7.7 - 14.8)	1.0%	CI (0.5 - 2.2)
Oromia	Bule Hora	Feb/Mar 2011	10.5%	CI (8.4- 13.0)	1.2%	CI (0.6 -2.3)
	Abaya	March 2011	4.8%	CI (3.2 - 7.2)	0.2%	CI (0.0- 1.6)
	Habro	Feb/March 2011	8.5%	CI (6.2 - 11.5)	0.2%	CI (0.0- 1.6)
	Boke	Jan/Feb 2011	5.4%	CI (3.9-7.4)	0.2%	CI (0.0- 1.2)
	Midega Tolla	Jan/Feb 2011	10.1%	CI (7.5 - 13.5)	0.2%	CI (0.0- 1.4)
	Kurfachele	Jan/Feb 2011	7.3%	CI -8.3-13.8)	0.8%	CI (0.3-2.1)
	Odabultum	Mar/Apr 2011	10.8%	CI (8.3-13.8)	0.03%	CI (0.0- 0.26)
	Dello Mena	Apr 2011	14.2%	CI (10.8-18.4)	0.43%	CI (0.21-0.86)
	Meda Wolabu	Apr 2011	25.5%	CI (21.3-30.6)	0.48%	CI (0.29-0.78)
	Liben	Jun 2011	13.6%	CI (11.50- 16.00)	1.20%	CI (0.07 - 2.00)
	Shashemene	Jun 2011	7.0%	CI (5.2- 9.4)	0.7%	CI (0.2-1.9)
	Dawa Kechen	July 2011	14.9%	CI (12.30-18.00)	1.9%	CI (1.0 - 3.6)
Afar	Telalek	March 2011	8.9%	CI (6.7- 11.1)	1.0%	CI (0.4 - 1.6)
	Delelagie	Feb/Mar 2011	10.7%	CI (8.2 - 13,3)	0.7%	CI (0.1 - 1.2)
	Elidar	Aug 2011	26.1%	CI (21.9 -30.80)	2.0%	CI (1.2-3.30)
	Sumu Robi	Sep 2011	12.5%	CI (9.5-16.3)	0.1%	CI 0.0-1.1)
Amhara	Abergelle	Dec 2010-Feb 2011	10.1%	CI (7.7-13.2)	0.4%	CI (0.1 -1.5)
	Habru	Jan/Feb 2011	3.8%	CI (2.4 - 6.0)	0.0%	CI (0.0- 0.0)
	Bugna	Jul/Aug 2011	11.7%	CI (8.8-15.5)	0.6%	CI (0.10-2.80)
	Gubalafto	Jul/Aug 2011	10.1%	CI (7.5-13.4)	0.4%	CI (0.1-2.80)
	Dessie Zuriya	Sep 2011	10.6%	CI (7.1-15.7)	0.6%	CI (0.1- 2.3)
	Sekota	Mar/Apr 2011	12.6%	CI (10.2-15.6)	1.5%	CI (0.8-2.7)
	Delanta	Apr 2011	11.3%	CI (8.7-14.5)	0.0%	CI (0.0-0.0)
	East Belessa	Apr/May 2011	12.9%	CI (10.5-15.9)	0.8%	CI (0.3-2.2)
	Ebinat	Jun 2011	12.4%	CI (9.6 -15.9)	1.0%	CI (0.4-2.4)
Lasta	Apr/May 2011	9.0%	CI (6.9- 11.8)	0.7%	CI (0.3-1.9)	
Dire Dawa	Dire Dawa	May 2011	10.8%	CI (8.2-14.1)	0.8%	CI (0.3-1.9)

Source: Compiled by UNICEF and WFP based on data provided by ENCU/DRMFSS.

WHO standards:  Critical  Serious  Poor  Acceptable