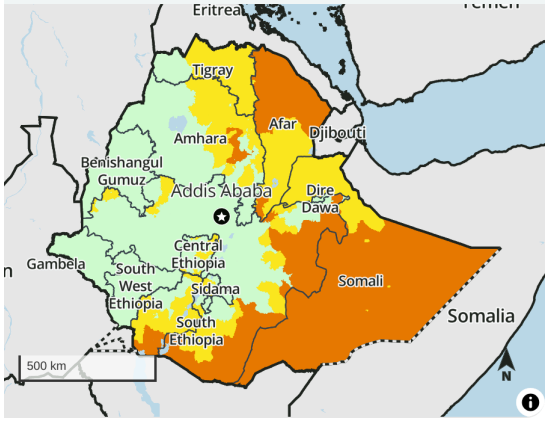
Emergency (IPC Phase 4) likely to emerge in early 2026 in Oromia amid crop failures

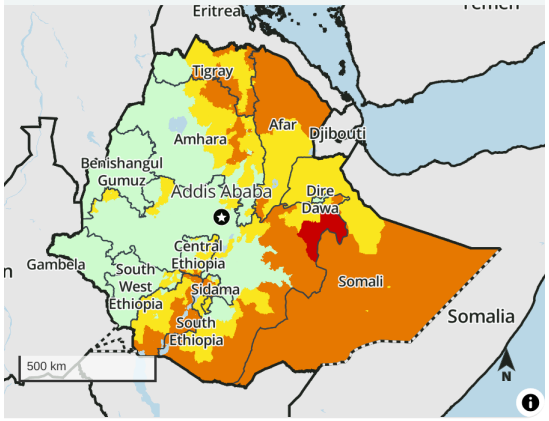
Key Messages

- **Emergency (IPC Phase 4) outcomes will most likely emerge in lowland areas of East Hararghe Zone of Oromia Region** in early 2026. Poor households in this area had minimal to no production in 2025 and are currently atypically market dependent during the harvest period with below-average income. Some households are already engaging in more severe coping strategies to access food. In early 2026, as seasonally available labor declines and food prices increase, poor households will likely face extreme difficulty accessing food with associated high levels of acute malnutrition and mortality associated with food consumption deficits.
- **Crisis (IPC Phase 3) outcomes with some households in Emergency (IPC Phase 4) will likely persist through May in southern and southeastern pastoral areas**. Households recently displaced due to conflict in these areas are of high concern, as some likely face extreme difficulty accessing food. Delayed October to December 2025 *deyr/hageya* rains and forecasted below-average rainfall will likely further impede recovery from the 2020-2023 severe drought as pastoralists cope with a second or even third consecutive poor season. If the *deyr/hageya* season fails, the population in need of food assistance will likely rapidly rise; and if the February to May *gu/genna* rains are significantly below-average, acute food insecurity could rapidly deteriorate by mid-2026.
- **Crisis (IPC Phase 3) outcomes are expected to persist in northwestern parts of Afar**. Conflict-affected areas, along with several *woredas* in Zone 1, are projected to face continued access constraints to food and cash income, despite gradual conflict recovery. Poor households are likely to adopt livelihood coping strategies amid low purchasing power.
- **Food assistance needs are expected to decrease across Ethiopia with the ongoing *meher* harvest, but needs will likely increase starting in early 2026.** Stressed (IPC Phase 2) outcomes are expected across much of the north, northeast, and central parts of the country from October to January, driven by average *meher* production. In areas with below-average *meher* harvests, stocks are expected to deplete atypically early, resulting in Crisis (IPC Phase 3) outcomes.

Projected food security outcomes, October 2025 - January 2026



Projected food security outcomes, February - May 2026



IPC 3.1 Acute food insecurity classification

Presence countries

1: Minimal | 2: Stressed | 3: Crisis | 4: Emergency | 5: Famine

Symbols

! Would likely be at least one phase worse without current or planned humanitarian food assistance

Mapped boundaries do not imply official recognition or endorsement of any physical or political boundaries.
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Source: FEWS NET

The analysis in this report is based on information available as of October 29, 2025.

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Food security context

Ethiopia's complex livelihood systems are shaped by multiple rainy seasons and rugged geography, which together define distinct market systems. The country's three primary rural livelihood systems – pastoral, agropastoral, and cropping – are rooted in seasonal change, governed by the onset, peak, and end of multiple rainy periods. In northern and central cropping areas, February to May *belg* rainfall starts the agricultural season. In the pastoral south and southeast, the main rainy seasons are the October to December *deyr/hageya* and March to May *gu/genna*. October typically marks the end of the main rainy season – June to September *kiremt* season – across most of the country. *Kiremt* rains generally coincide with the main rains in northern pastoral areas, July to September *karan/karma,* which is preceded by the March to May *diraac/sugum* season. The *meher* harvest follows, beginning in the north around September/October and advancing south. In cropping and agropastoral areas, the main lean season typically aligns with the main rainy season when food stocks are low. Conversely, pastoral lean seasons align with the dry months when livestock are unlikely to be birthing or lactating.

Ethiopia has faced compounding conflict, drought, and economic shocks, notably between 2020 and 2023. Households in northern Ethiopia and in the pastoral south and southeast were most severely affected, where household assets and ability to access typical food and income sources were severely eroded. Poor households in these areas relied heavily on humanitarian food assistance, community support, and negative coping strategies. Full recovery of livestock herds, labor markets, and household assets is expected to take many years, with past shocks increasing vulnerability to future ones.

In the aftermath of the 2020-2022 conflict in Tigray, livelihoods remain severely affected in Tigray and neighboring areas of Amhara and Afar. While the signing of the Pretoria Agreement in November 2022 formally ended the war, areas remain contested, including West Tigray and hard-to-reach areas along the border with Eritrea. This, coupled with internal divisions within the Tigray People's Liberation Front (TPLF), has increased concerns about the agreement's durability. In Amhara, clashes between Fano militias and government forces disrupted road access and market activity. In western Oromia, fighting between the Oromo Liberation Army (OLA) and government forces continues to disrupt typical livelihood activities.

In southern and southeastern pastoral areas, food and income from livestock milk production, reproduction, and sales typically peak with the seasonal improvements associated with the *gu/genna* and *deyr/hageya* seasons. Domestic and export demand peaks during the Hajj. Food and income are typically lowest during the dry seasons (January-March and August-October), when decreased pasture and water availability coincide with declining livestock body conditions and saleability. The 2020-2023 drought severely eroded herd sizes, leaving poor households with minimal livestock holdings. The mixed seasonal performances since the end of the drought have slowed recovery in many areas, significantly stalling the inherently slow process of livestock herd regeneration. Some pastoral households rely on agricultural labor and community support for food and income, and some households near rivers are engaging in cropping as much as possible.

In northern cropping areas, including Tigray and Amhara, crops and labor migration – along with the Productive Safety Net Program (PSNP) – are typically the most important sources of food and income throughout the year. Households typically plant crops at the start of the *kiremt* rains and harvest green crops in September before the *meher* harvest. In a typical year, the average household relies on own production and stocks through at least February, after which households must purchase food. However, poor households that typically engage in labor migration during the *kiremt* season to work on larger farms in West Tigray and other areas of the country are prevented due to continued tensions.

In northern pastoral areas, including Afar, livestock births and milking provide food and income, with peak birthing typically in April/May and July/August. However, the conflict in northern Ethiopia left households (particularly the very poor) with few animals, especially in pastoral Afar. In addition to livestock, poor households rely on cash income, often through casual labor and firewood and bush product sales, as well as PSNP; however, recent reductions in the number of months of PSNP assistance may constrain food access among participating households. Poorer households rely heavily on PSNP from February to July.

In eastern agropastoral areas, including much of eastern Oromia and adjacent lowlands, varied terrain supports mixed agropastoral livelihoods based on rainfed cereals, pulses, and small ruminants. Notably, in East and West Hararghe, *khat* production typically accounts for about half of household income.

Learn more

Follow these links for additional information:

- **July Key Message Update**
- Latest Country Key Message Update: **August-September 2025**
- Overview of **FEWS NET's scenario development methodology**
- Overview of the **IPC and IPC-compatible analysis**
- FEWS NET's approach to **humanitarian food assistance analysis**

Current anomalies in food security conditions as of October 2025

Sporadic conflict persists across multiple regions, driven by political, ethnic, and territorial disputes. While the scale and intensity vary, these overlapping conflicts collectively disrupt livelihoods, restrict market access, and limit mobility. Conflict in neighboring Sudan and South Sudan continues to drive refugee inflows, and tensions with Eritrea and Somalia impact border-area livelihoods.

Market activity is seasonally typical in most areas, though insecurity and high transportation costs drive **localized price spikes**. Staple food prices in October are relatively stable compared to September in the west and center, reflecting seasonal improvement in supply; however, prices are increasing in the pastoral south and southeast, as is typical for this time of year. Prices remain well above average due to the inflationary effects of last year's International Monetary Fund-supported currency float. However, **household purchasing power remains low** as daily wages (250-450 ETB/day) have not kept pace with inflation.

Despite the delayed onset of the **June to September *kiremt* rains**, **the green *meher* harvest is beginning (albeit delayed)**. The harvest is anticipated to be near average nationally, with localized areas of below-average production associated with weather shocks.

Eastern agropastoral areas (East and West Hararghe zones of Oromia)

Across eastern agropastoral areas, irregular and poor rainfall forced households in the lowland and midland areas to replant two to three times; drove poor crop development and production; and likely delayed the harvest until the end of November. In East and West Hararghe zones, **over 40 percent of the planted *meher* was lost** based on zonal information **,** driving failed production in many areas. Water sources have dried up, leading to atypical livestock migration. Barriers to *khat* exports to Somalia contributed to a roughly 75 percent decline in sales over the past year, severely reducing related income.

Southern and southeastern pastoral areas (southern Somali, Oromia, and South Ethiopia)

October has been marked by a few rainfall days with **continued dry conditions** in the pastoral south and southeast. This follows a **below-average March to May *gu/genna* season** – the second below-average season in many areas across southern Somali – followed by high temperatures in the June to September dry period. The **dry conditions** are limiting pasture and water availability, and reducing livestock health, productivity, and overall milk availability. Additionally, the continued poor pasture conditions are once again delaying recovery from the 2020-2023 drought. Intercommunal conflict in July 2025 along the Borena-Somali border **displaced an estimated 288,000 people** and **disrupted market supply and access, driving food price increases and the loss of livestock, pasture, and cropland.**

Northern cropping areas (Amhara and Tigray)

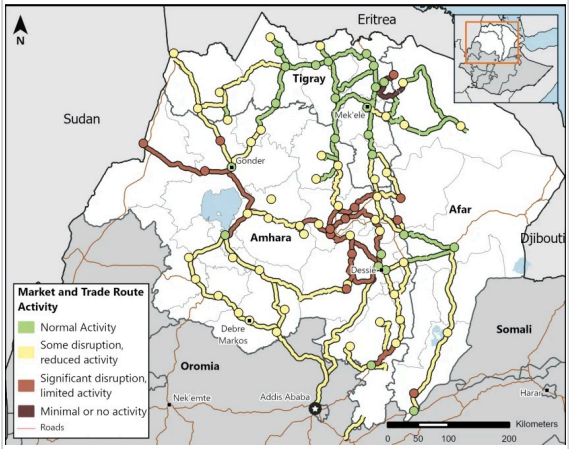
The green *meher* harvest is underway, though sorghum development is delayed in areas of Tigray and Amhara due to the late onset of June to September *kiremt* rains. **Moisture deficits in late-planted fields** are expected to constrain production, particularly for sorghum. Notably, in Tigray, and South and North Wello zones of Amhara, dry spells are driving below-average production, though in other areas moisture deficits may be partially offset by September.

Insecurity has declined overall relative to previous years; however, **localized clashes** in Tigray and Amhara intermittently impede trade flows and block major roads, driving increases in market prices, particularly in remote areas (Figure 1). Although large-scale displacement is not ongoing, previously displaced populations are slow to return to their places of origin.

Employment opportunities remain below pre-conflict levels. In Amhara and Tigray, labor migration to their respective western sesame-producing zones has declined due to conflict-related constraints. Reduced seasonal labor migration options have pushed many Tigrayan youth toward precarious gold mining or irregular migration to Arab countries.

Figure 1

Market function and trade flows in northern Ethiopia



Source: FEWS NET

Northern pastoral areas (Afar and northern Somali)

Livestock body conditions are nearly normal in Afar following favorable July to September *karan/karma* rains. However, total **milk availability remains below average** due to diminished herd size following the prior drought and 2020-2022 conflict. Income is constrained by limited market access with neighboring Amhara and Tigray and **below-average livestock-to-grain terms of trade**. Despite improvement from last year, food price increases have outpaced livestock prices, partially driven by the effects of conflict on market linkages. Alternative income-earning options – such as agricultural and construction labor, camel transportation services, and petty trade – remain limited due to lingering conflict, recurrent clan clashes, natural disasters, and broader economic instability. In northern Somali, the failure of the 2025 *diraac/sugum* and delayed *karan/karma* rains drained pasture and water resources, prompting livestock migration.

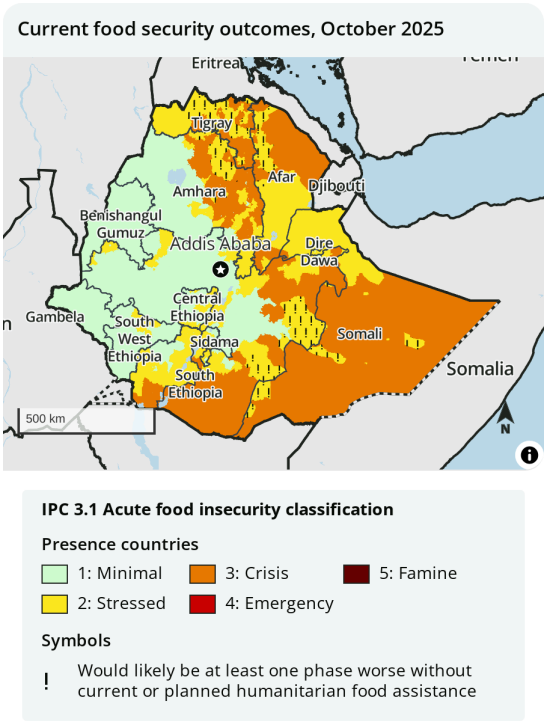
Humanitarian food assistance

According to the **Food Cluster**, 1.9 million people received humanitarian food assistance in September (almost half of the 3.7 million people who received assistance in August). Food assistance distributions typically decline in September, associated with seasonal improvements in food access. Distribution reports from the Ethiopia Disaster Risk Management Commission (EDRMC) were unavailable at the time of this report, and the number of people reached with food assistance is likely higher. Assistance distributions were concentrated in Tigray, Somali, Amhara, Oromia, and Afar regions, though distributions were not always regular. . Fuel shortages (particularly in Tigray) and security constraints in Amhara and Oromia impeded assistance distributions. In October, **WFP reduced refugee food rations** from covering 60 percent of beneficiaries' daily kilocalorie needs to 40 percent due to funding shortfalls.

Current acute food insecurity outcomes as of October 2025

Eastern agropastoral areas (East and West Hararghe zones of Oromia)

In the lowland areas, where Crisis (IPC Phase 3) outcomes are ongoing,poor households have limited to no own-produced food stocks amid the near-total failure of the 2025 *belg* and *meher* harvests. Households are market dependent with below-average purchasing power due to high food prices and reduced income. Notably, declines in *khat* sales have significantly reduced cash income, particularly for poor households. To access market foods, households are already engaging in firewood and charcoal sales, construction and other informal labor, and atypically selling livestock. There are also reports of atypical migration to nearby towns and distant areas in search of labor opportunities, and sending younger children, who will be expected to work, to relatives to eat. Poor households are also engaging in consumption-based coping, such as reducing meal quantity and frequency. Field reports indicate levels of acute malnutrition are rising, particularly in lowland *woredas* of East Hararghe, as seen by increases in admissions of children with severe acute malnutrition to therapeutic feeding programs.



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Source: FEWS NET

Stressed (IPC Phase 2) outcomes are ongoing in the midland and highland areas of East and West Hararghe zones. The ongoing *meher* harvest is low and purchasing power is below average, but households are able to consume food from their own production. As a result, households are able to meet their food needs, but face difficulty meeting their non-food needs.

Southern and southeastern pastoral areas (southern Somali, Oromia, and South Ethiopia)

Widespread Crisis (IPC Phase 3) outcomes are ongoing amid many poor pastoral households, with pockets likely facing Emergency (IPC Phase 4). Ongoing food assistance is mitigating food consumption deficits in some areas of the region, resulting in localized Stressed! (IPC Phase 2!) outcomes. Dry conditions in October are driving poor-to-moderate livestock body conditions, decreasing livestock value. While herd sizes have moderately recovered following the 2020-2023 drought, poor households still own few animals, limiting livestock sales and related income. Typically, households start to access food and income from milk as livestock start birthing; however, milk availability is atypically low, further limiting household food and income access and constraining purchasing power. Displaced households in East Borena, Dawa, and Liban zones face insecurity that is restricting access to pasture and water resources, as well as income-earning opportunities. Consequently, food shortages and reliance on coping strategies such as **borrowing, selling remaining assets (including livestock), atypically engaging in daily labor (e.g., long-distance water collection), and depending on already overstretched host communities** are likely ongoing. It is likely that some of the recently displaced populations and those who continue to have limited herds are facing Emergency (IPC Phase 4) outcomes.

Northern cropping areas (Amhara and Tigray)

Crisis (IPC Phase 3) outcomes are widespread in areas where the harvest is delayed or households face conflict-related disruptions to their livelihood activities. In some areas, where large-scale food assistance is ongoing, Stressed! (IPC Phase 2!) outcomes are ongoing. Households typically start consuming foods from own production in October; however, delays in the harvest have resulted in an atypically long lean season. An increasing number of households are relying on market purchases for food and obtaining income by selling livestock or engaging in risky mining and migration. The combination of constrained household income and persistently high staple food prices is

driving below-average household purchasing capacity, particularly in conflict-affected Amhara, where transportation routes are often blocked. Consequently, households continue to face food consumption gaps and are employing consumption-based coping strategies such as reducing meal size and frequency, contributing to growing concerns about increased levels of acute malnutrition. In conflict-affected areas in both Tigray and Amhara, food assistance is supporting improvements in consumption, leading to Stressed! (IPC Phase 2!) outcomes. In West Tigray, better security conditions and ample rainfall enabled households to meet basic food needs, leading to Stressed (IPC Phase 2) outcomes.

Northern pastoral areas (Afar and northern Somali)

Poor households in Zones 2, 4, northeastern Zones 1 and 6, and northern-northeastern Zone 3 face food consumption deficits with Crisis (IPC Phase 3) outcomes ongoing. Despite the favorable *karma/karan* rains and improving pasture availability, livestock body conditions are poor, compounding atypically low herd sizes that have not yet fully recovered from the 2020-2022 conflict and prolonged drought. As a result, households have reduced access to food and income from livestock and milk sales, and purchasing power is further eroded as income fails to keep pace with rising food prices. To compensate, households are selling more livestock than typical (undermining future livelihood recovery) and relying on negative coping strategies, such as reducing meals and sending family members to stay with relatives. **Localized areas in western Afar are experiencing Stressed! (IPC Phase 2!) outcomes** as food assistance is improving food consumption. **Northern Somali continues to experience Stressed (IPC Phase 2) outcomes** due to relatively stable conditions and continued access to markets, despite the failed 2025 *diraac/sugum.*

Key assumptions about atypical food security conditions underpinning the most likely scenario through May 2026

- **October to December 2025 *deyr/hageya* rainfall** in southern and southeastern pastoral areas will likely be significantly below average, with an elevated likelihood of localized drought conditions.
- **Macroeconomic conditions** are expected to remain poor, with further ETB depreciation and persistent high inflation. Market and trade routes are expected to function well in most areas, though conflict is likely to intermittently disrupt supply flows and market function. High fuel prices and shortages will likely continue to increase transportation and commodity costs.
- **Numerous and layered conflicts** are expected to persist across Ethiopia. In **Amhara**, conflict is likely to continue with periodic escalations, while internal tensions in **Tigray** are unlikely to be fully resolved, resulting in violence between armed actors. Conflict in **Oromia** is likely to continue with periodic escalation through May 2026.
- The total number of **IDPs** is expected to remain steady. Some displaced populations are expected to return to their place of origin, but increased displacements in Oromia and Amhara will likely prevent a countrywide decrease. The **refugee** population is expected to increase moderately due to continued conflict in Sudan and South Sudan.
- Nationally, a **near-average 2025 *meher* harvest** is expected due to the average production in western surplus-producing areas, with localized below-average production in areas of eastern and southern **Tigray**; Wag Himra; and North and South Wello zones of **Amhara,** and near failure in areas of East and West Hararghe zones of **Oromia**.
- **Staple food prices** are expected to follow typical seasonal trends, decreasing through January 2026 and increasing from February to May; however, prices will most likely remain above last year's and the average.
- **Agricultural labor opportunities** in **northern cropping areas** are expected to improve slightly relative to recent years but remains below average during the October–November *meher* harvest. Availability of agricultural labor is anticipated to be high since there are limited labor migration options. Regional migratory labor opportunities are anticipated to remain limited for poor households in **central and eastern Tigray**.

Pasture and water availability in the **pastoral south and southeast** are expected to marginally improve during the 2025 *deyr/hageya*; however, vegetation conditions are likely to quickly deteriorate with limited pasture availability expected during the January to March *jilaal* dry season. Meaningful recovery in pasture and water availability is anticipated only after the *gu/genna* rains onset in March. In **northern pastoral areas**, sufficient water and pasture availability are expected through January 2026; however, during the in February and March are expected to decline atypically early to below-average levels. Availability is then expected to recover with the onset of the February to May *diraac/sugum* rains.

- **Livestock body conditions** in the **pastoral south and southeast** are anticipated to remain below average through the end of 2025, then further deteriorate in early 2026 until the *gu/genna* begins. Likewise, in **northern Somali**, livestock health is already poor, and below-average cattle milk availability is expected, particularly in Fafan. Conversely, in **northern Afar,** body conditions are expected to improve slightly with water and pasture availability but will remain below average until at least the start of the March-May *diraac/sugum*. Overall, due to atypically low herd sizes, milk availability in all pastoral areas is expected to follow seasonal trends; however, at atypically low levels throughout the projection period.

- **Livestock prices** in the pastoral south and southeast are expected to remain stable despite poor body conditions, as below-average market supply drives market competition and demand from the Middle East remains high. In northern pastoral areas, livestock prices are expected to increase following typical seasonal patterns through January 2026; however, prices are expected to decline from February to April.

- **Remittances** from urban to rural households are likely to remain below average as increases in the urban cost of living are likely to reduce the amount urban households can send.

- **PSNP** distributions are ongoing and will continue through the end of 2025 for direct support beneficiaries. In both East and West Hararghe, PSNP is also expected to continue through the end of 2025 for public work beneficiaries. In 2026, PSNP is expected to commence on time around February for both direct support and public work beneficiaries.

Humanitarian food assistance

- Humanitarian food assistance distributions are expected to decline seasonally through December, as is typical during the harvest period; however, food assistance distributions will continue to areas of highest concern, such as northern and southern Ethiopia. While food assistance distributions are expected to continue, detailed distribution plans will not be available until after the November/December *meher* seasonal assessment and is not included in FEWS NET's analysis.

Projected acute food insecurity outcomes through May 2026

Eastern agropastoral areas (East and West Hararghe zones of Oromia)

Crisis (IPC Phase 3) outcomes are anticipated in late 2025 in the lowlands of the East and West Hararghe zones as households exhaust food stocks from the *meher* harvest. Livestock productivity will likely remain poor, though crop residue is expected to provide limited feed, supporting some milk production. Households are expected to increasingly depend on markets for food amid anticipated price increases, driving atypical livestock sales and labor migration. PSNP, alongside community support, is expected to support some food consumption. Nevertheless, poor households will likely reduce meal quantity and frequency, borrow food and cash, and prioritize feeding children. As a result, moderate food consumption deficits are most likely; however, households are expected to increasingly face extreme difficulty accessing food. It is expected that increasing numbers of households are expected to face Emergency (IPC Phase 4) outcomes as they face extreme difficulty accessing food.

By early 2026, area-level Emergency (IPC Phase 4) outcomes are likely to emerge in these areas. Poor households will likely have no food stocks and be completely market dependent. However, income from livestock, *khat* sales, and labor is limited, driving down purchasing power. Households are expected to attempt to expand

engagement in labor migration and livestock sales; however, due to small herds, households are expected to sell most of their herds and start migrating to new areas in search of food. Community sharing is likely; however, it will not moderate the likely large food consumption deficits. Levels of acute malnutrition and mortality are anticipated to rise associated with the lack of food.

Stressed (IPC Phase 2) outcomes are likely in midland and highland areas of East and West Hararghe, where *meher* production did not fail, and households have food stocked through late 2025. Acute food insecurity is expected to deteriorate as poor households will likely exhaust food stocks amid rising staple food prices and declining income. While localized harvests in West Hararghe are expected to modestly improve food access, they will be insufficient to avoid food consumption gaps. This is expected to drive Crisis (IPC Phase 3) in early 2026 through at least May 2026. Food security is expected to deteriorate to Crisis (IPC Phase 3) as households exhaust their food stocks with below-average purchasing power.

Southern and southeastern pastoral areas (southern Somali, Oromia, and South Ethiopia)

Crisis (IPC Phase 3) outcomes are expected to persist, with some households likely facing Emergency (IPC Phase 4). Community support, where better-off households lend milking animals or give food to poorer ones, is likely strained after recurrent shocks. While high food prices may temporarily stabilize, income from livestock sales and products is expected to remain low, driven by small herds and poor body conditions. Poor households are expected to atypically sell livestock, send family members to live with relatives, and increasingly rely on labor migration, selling firewood and charcoal, and water-collection services. Additionally, consumption-based coping is expected. Emergency (IPC Phase 4) is expected among recently displaced populations and poor households with limited herds, as households continue to have scarce resources and extreme difficulty accessing food.

Northeastern cropping areas (Amhara and Tigray)

Stressed (IPC Phase 2) outcomes are expected between October 2025 and January 2026, while the worst-conflict-affected areas will likely remain in Crisis (IPC Phase 3). Most poor households are expected to start accessing food from the *meher* harvest in November, temporarily improving food access. In conflict-affected areas of North/South Wello and South Gondar, restricted mobility will likely limit market access and income.

Crisis (IPC Phase 3) is most likely to emerge in early 2026, persisting through at least May 2026 in areas that had a poor 2025 harvest due to weather shocks or conflict, with higher-production or less-conflict-affected areas expected to remain Stressed (IPC 2). Household stocks are expected to deplete in early 2026, driving increased market dependence. Income is anticipated to decrease with the declines in labor demand after the harvest and ongoing insecurity. Poor households are expected to sell livestock and risk artisanal mining and migration to access cash. As purchasing power declines, households will likely reduce meal size and frequency and rely on borrowing or credit.

Northern pastoral areas (Afar and northern Somali)

Crisis (IPC Phase 3) outcomes are expected in conflict-affected northern Afar through May 2026, although most areas in southern Afar and northern Somali will likely continue to experience Stressed (IPC Phase 2) outcomes due to broadly better security and market access. In the near term, regenerated pastures will likely support livestock health; however, continued recovery will likely drive below-average milk availability. By early 2026, households will likely undertake distress sales, accrue debt, or extract natural resources to access cash for food purchases. Continued conflict-related trade disruptions and high food prices are expected to constrain food purchasing power in the north, resulting in consumption gaps. Consequently, poor households in northern Afar will likely reduce meal size and frequency, consume wild and less-preferred foods, and borrow food. Very poor households are expected to reduce household expenses by sending household members to live with relatives.

Central agropastoral and belg-dependent areas (Sidama, Central, and South Ethiopia)

Starting in **March 2026, lowland Rift Valley areas are likely to deteriorate to Crisis (IPC Phase 3).** These households are expected to deplete food stocks and become market dependent. While the 2026 *belg* production is expected to offer some labor income, high staple food prices will likely reduce purchasing power.

Annex 1: Key sources of evidence used in this analysis

Evidence	Source	Data format	Food security element of analysis
Livelihood zone profiles	HEA Activity and Government of Ethiopia (Available in FEWS NET Data Portal)	Baseline profile reports	Typical sources of food and income used by the livelihood zone
Conflict monitoring and analysis	**ACLED** and other sources	Quantitative data on Conflict incidents (ACLED), partner reports	Conflict incidents and locations are analyzed for their impact
Agroclimatology monitoring and forecast	USGS, **NOAA's Climate Prediction Center,Climate Hazards Center**, and EMI	Climate forecast models, maps, and regular briefings from FEWS NET's Agroclimatology Team, and partner reports	Weather anomalies, including rainfall, groundwater, pasture, and cropping conditions
Crop production	EDRMC (Monthly reports available via email)	Quantitative and qualitative data, partner reports	Production estimates, yield reduction, and the level of its impact on the supply and prices of food commodities in the markets
Livestock production	Regional EDRMCs, Agriculture Taskforce, and partners working in pastoral areas (Reports obtained from partners via email)	Qualitative information from partner reports	Herd sizes, milk production, and livestock market values are analyzed to understand the level of impact on food and income access by pastoral households
Food and livestock prices and wage rates	Regional DRM office and WFP (Reports obtained via email)	Quantitative data from WFP and qualitative information from regional DRM offices	Food and livestock prices, as well as wage rates, to assist our understanding of purchasing capacity
Humanitarian assistance	**Food Cluster**	Quantitative data	Food assistance distributions to households
ETB to USD currency exchange rate data	Commercial Bank of Ethiopia	Quantitative data	Exchange rate trends and impacts on imports, food prices, cost of living, and small businesses
CPI and Inflation	CSS/WFP (Received from WFP via email)	Quantitative data on monthly food and non-food inflation	CPI is used to estimate inflation by month and differences in inflation and its impact on the overall macroeconomic condition of the country.

Evidence	Source	Data format	Food security element of analysis
Population Displacement, and Refugees	**IOM**, OCHA, **UNHCR**	Quantitative data on displacement trends	Displacement trends, living conditions, and needs, used in the analysis of food security among IDPs
Therapeutic Food Programme (TFP) Admission	**ENCU**	Quantitative data	SAM Admission Trend per region and *woredas*
MUAC screening reports	ENCU/Regions DPPB (Received from partners when available)	Quantitative data	Prevalence of acute malnutrition
PSNP	Ministry of Agriculture (Received via email)	Quantitative data	Food and cash distribution for the most vulnerable Households
Multi-Cluster/Sectoral Initial Rapid Assessment (MIRA) reports (**East Borena Zone**, **Sitti Zone**, **Fafan Zone**, and parts of **Afar**)	Somali Region DRMB	Qualitative and Quantitative Data	Displacement, living conditions, and needs of IPDs

Annex 2: FEWS NET's analytical approach explained

Early warning of acute food insecurity outcomes requires forecasting months in advance to provide decision makers with sufficient time to budget, plan, and respond to expected humanitarian crises. However, due to the complex and variable factors that influence acute food insecurity, definitive predictions are impossible. ***Scenario Development*** *is a methodology that allows FEWS NET to meet decision makers' needs by developing a "most likely" scenario of the future.*

FEWS NET's scenario development process applies the Disaster Risk Reduction framework and a livelihoods-based lens to assess acute food insecurity outcomes. A household's risk of acute food insecurity depends not only on hazards (such as drought) but also the household's vulnerability to these hazards (e.g., the level of dependence on rainfed crop production for food and income) and coping capacity (which considers both the household's ability to cope with a given hazard and the use of negative coping strategies that harm future capacity). To evaluate these factors, FEWS NET bases this analysis on a strong foundational understanding of local livelihoods. FEWS NET's scenario development process also accounts for the Sustainable Livelihoods Framework; the Four Dimensions of Food Security; and UNICEF's Nutrition Conceptual Framework, and is closely aligned with the ***Integrated Food Security Phase Classification*** *(IPC) analytical framework.*

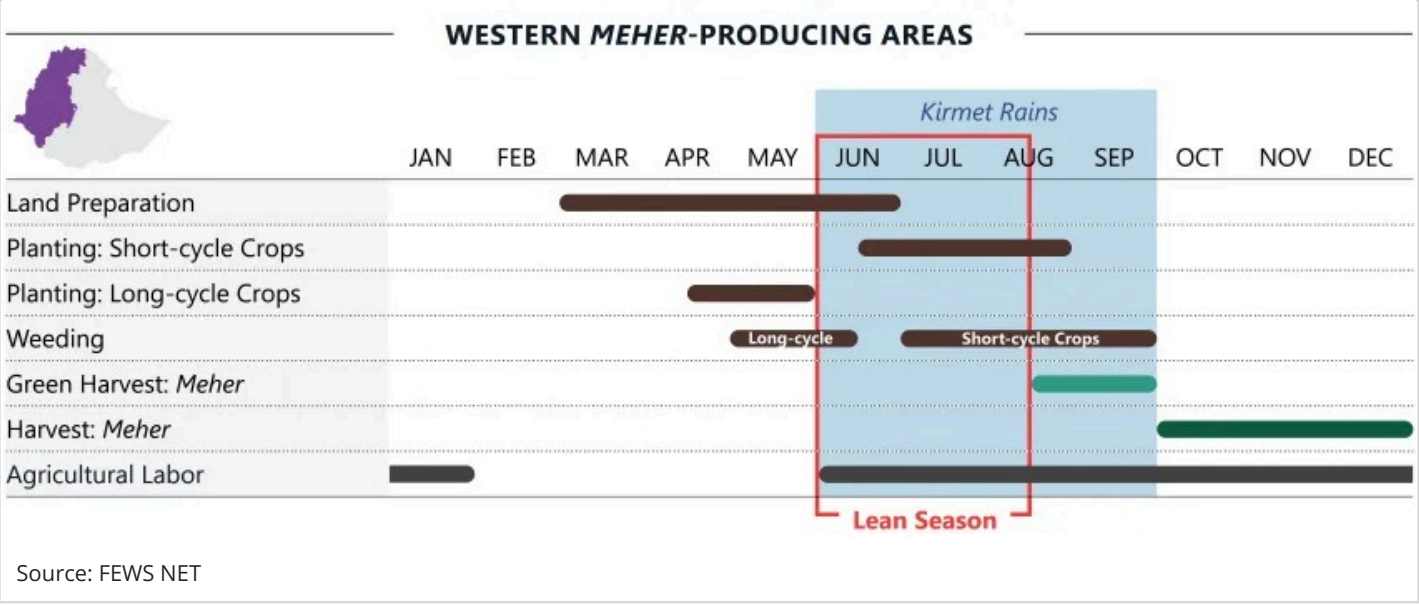
- ***How does FEWS NET analyze current acute food insecurity outcomes?*** *FEWS NET assesses the extent to which households can meet their minimum caloric needs. This analysis converges evidence of current food security conditions with available direct evidence of household-level food consumption and livelihood change. FEWS NET also considers available area-level evidence of nutritional status and mortality, focusing on whether these reflect the physiological impacts of acute food insecurity. FEWS NET uses the globally recognized five-phase* ***Integrated Food Security Phase Classification (IPC) scale*** *to classify current acute food insecurity outcomes, and the analysis is IPC-compatible. In addition,* ***FEWS NET applies the "!" symbol*** *to designate areas where the mapped IPC Phase would likely be at least one IPC Phase worse without the effects of ongoing humanitarian food assistance.*
- ***How does FEWS NET develop key assumptions underpinning the most likely scenario?*** *A key step in FEWS NET's scenario development process is the development of evidence-based assumptions about factors that affect food security. These include hazards and anomalies in food security conditions that will impact the evolution of household*

food and income during the projection period, as well as factors that may affect nutritional status. FEWS NET also develops assumptions about factors expected to behave normally. Together, these assumptions form the foundation of the "most likely" scenario.

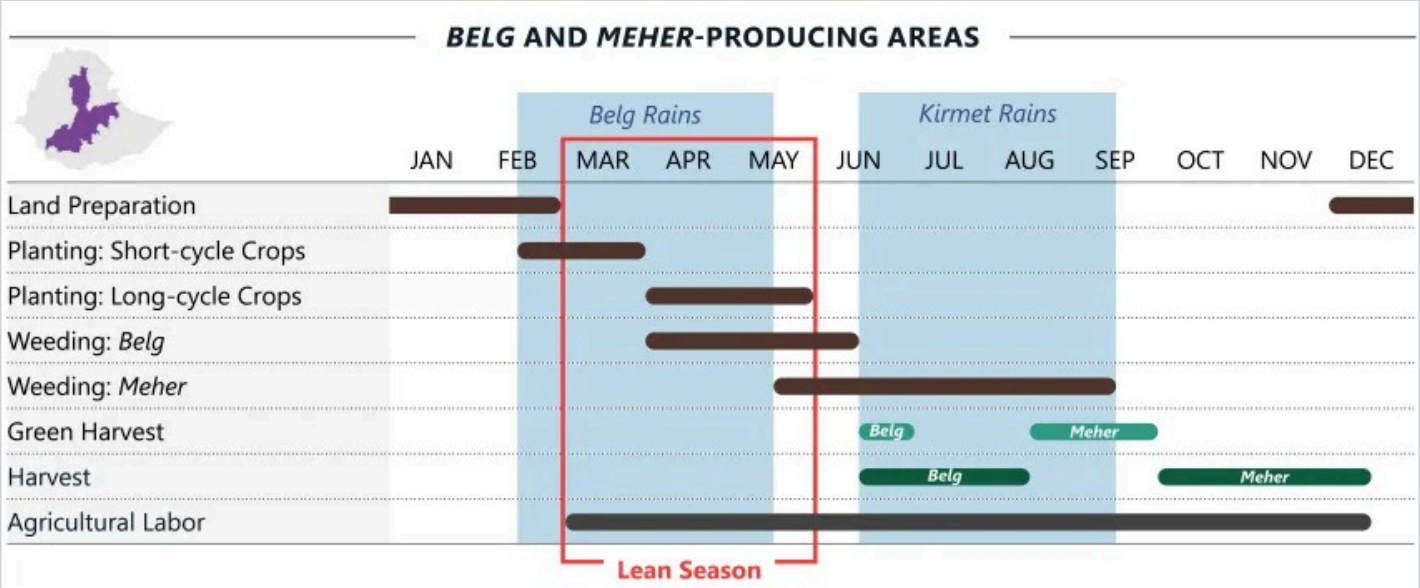
- ***How does FEWS NET analyze projected acute food insecurity outcomes?*** *Using the key assumptions that underpin the "most likely" scenario, FEWS NET projects acute food insecurity outcomes by assessing the evolution of households' ability to meet their minimum caloric needs over time. FEWS NET converges expectations of the likely trajectory of household-level food consumption and livelihood change with area-level nutritional status and mortality. FEWS NET then classifies acute food insecurity outcomes using the IPC scale. Lastly, FEWS NET applies the "!" symbol to designate any areas where the mapped IPC Phase would likely be at least one IPC Phase worse without the effects of planned – and likely to be funded and delivered – food assistance.*

- ***How does FEWS NET analyze humanitarian food assistance?*** *Humanitarian food assistance – defined as emergency food assistance (in-kind, cash, or voucher) – may play a key role in mitigating the severity of acute food insecurity outcomes. FEWS NET analysts always incorporate available information on food assistance, with the caveat that such information can vary significantly across geographies and over time. In line with IPC protocols, FEWS NET uses the best available information to assess where food assistance is "significant" (defined by at least 25 percent of households in a given area receiving at least 25 percent of their caloric requirements through food assistance). In addition, FEWS NET conducts deeper analysis of the likely impacts of food assistance on the severity of outcomes, as detailed in FEWS NET's guidance on* ***Integrating Humanitarian Food Assistance into Scenario Development****.*

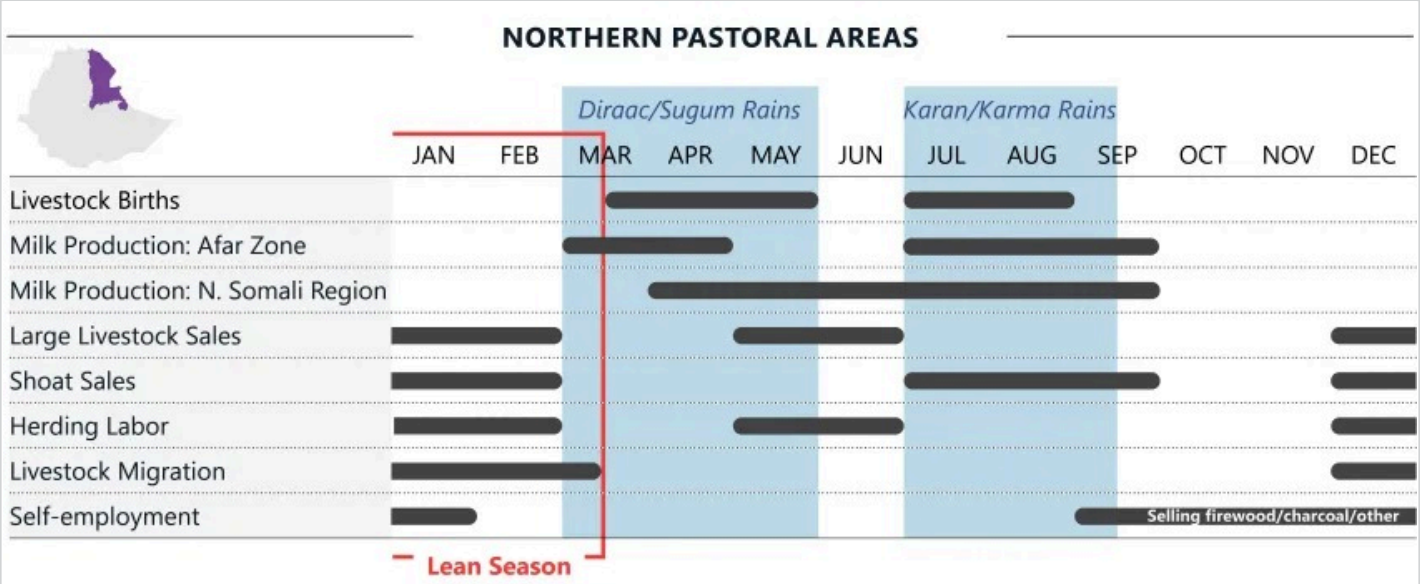
Annex 3: Seasonal calendar



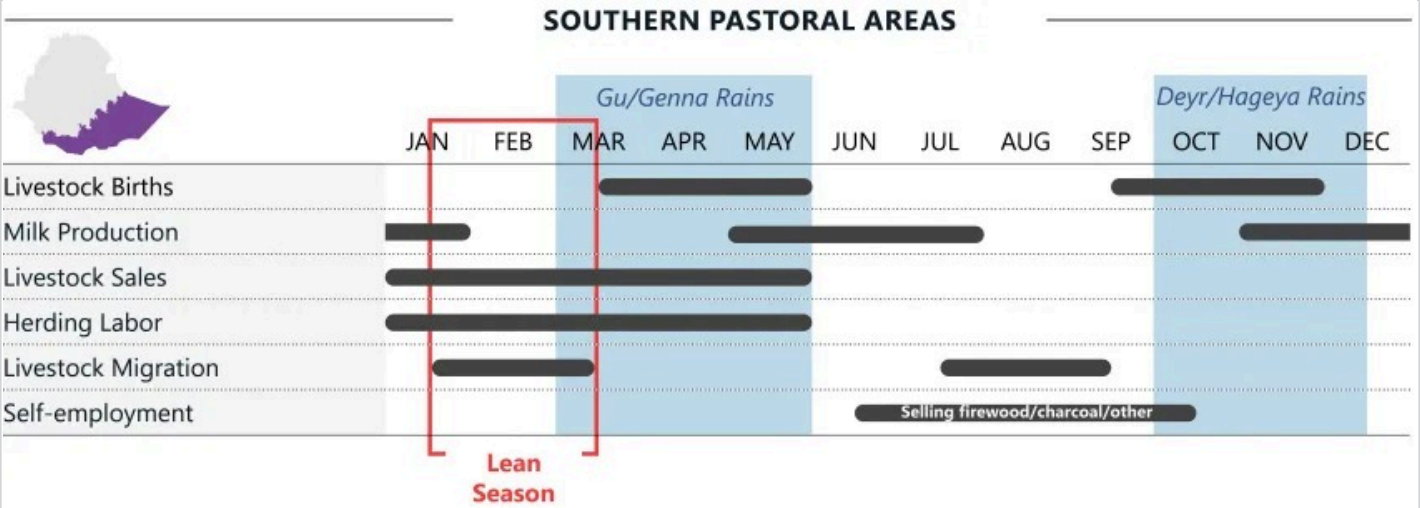
Source: FEWS NET



Source: FEWS NET



Source: FEWS NET



Source: FEWS NET

Annex 4: Events that would likely change projected acute food insecurity outcomes

*While FEWS NET's projections are considered the "most likely" scenario, there is always a **degree of uncertainty** in the assumptions that underpin the scenario. This means food security conditions and their impacts on acute food security may evolve differently than projected. FEWS NET issues monthly updates to its projections, but decision makers need advance information about this uncertainty and an explanation of why things may turn out differently than projected. As such, the final step in FEWS NET's scenario development process is to briefly identify key events that would result in a **credible alternative scenario** and significantly change the projected outcomes. FEWS NET only considers scenarios that have a reasonable chance of occurrence.*

National

Scale-up of humanitarian food assistance.

Likely impact on acute food insecurity outcomes: If humanitarian food assistance is distributed or planned and reaches a wide population with at least 25 percent of monthly kilocalorie needs in areas expected to face Crisis (IPC Phase 3) or Emergency (IPC Phase 4), there is the potential to reduce or prevent food consumption deficits. This may result in improvement to Crisis! (IPC Phase 3!) or Stressed! (IPC Phase 2!) outcomes.

Pastoral areas of southern and southeastern Ethiopia

October to December 2024 *deyr*/*hageya* season fails.

Likely impact on acute food insecurity outcomes: Households have had limited time for recovery to rebuild household assets (notably livestock) following the historic and severe 2020-2022 drought. Therefore, if the rainfall season fails, an increase in the population facing Crisis (IPC Phase 3) or worse outcomes could occur.

March to May 2025 *gu*/*genna* season is significantly below average or fails.

Likely impact on acute food insecurity outcomes: Crisis (IPC Phase 3) outcomes are most likely during the February to May 2026 period in a scenario where rainfall is below average during the *deyr/hageya* season and average during the *gu/genna*. If this rainfall season is significantly below average or fails, an increase in the population facing Crisis (IPC Phase 3) or worse outcomes could occur, with area-level Emergency (IPC Phase 4) outcomes between February and May.

Areas of Tigray and northeastern Amhara regions

Sustained escalation in conflict (beyond the level in FEWS NET's most likely scenario).

Likely impact on acute food insecurity outcomes: A sustained escalation in conflict beyond that currently assessed would limit population movement and further disrupt trade, causing a further decline in typical livelihood activities and market functioning and supply. Additionally, an increase in conflict during the ongoing *meher* harvest (October-January) or the 2026 *belg* agricultural season (beginning in April/May 2026) could further disrupt agricultural labor opportunities, decrease income, and decrease access to own-produced foods. This could result in more widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes during the projection period.

Annex 5: A closer look at the significantly below-average October to December forecast in the pastoral south and southeast

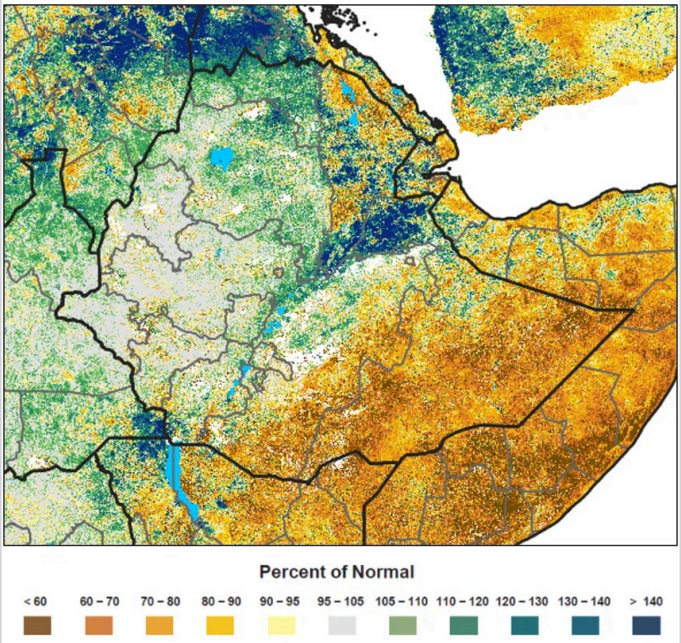
Context

The 2020-2023 drought severely depleted livestock herds, and poor households have experienced only a modest recovery since. Multiple goat birth cycles in 2023 and 2024, followed by cattle and camel births in May/June 2024, both following favorable rainy seasons, provided partial recovery; however, meaningful herd rebuilding following severe livestock losses requires multiple years.

The subsequent below-average October to December 2024 *deyr/hageya* season and poor March to May 2025 *gu/genna* rains limited pasture regeneration, particularly in the Borena Zone of Oromia and parts of Erer, Jarar, Korahe, and Dollo zones of Somali Region. Poor rainfall and subsequent hot and dry conditions resulted in atypically low pasture and water availability (Figure 2). As such, livestock body conditions are deteriorating, and milk production and income from sales have declined.

Figure 2

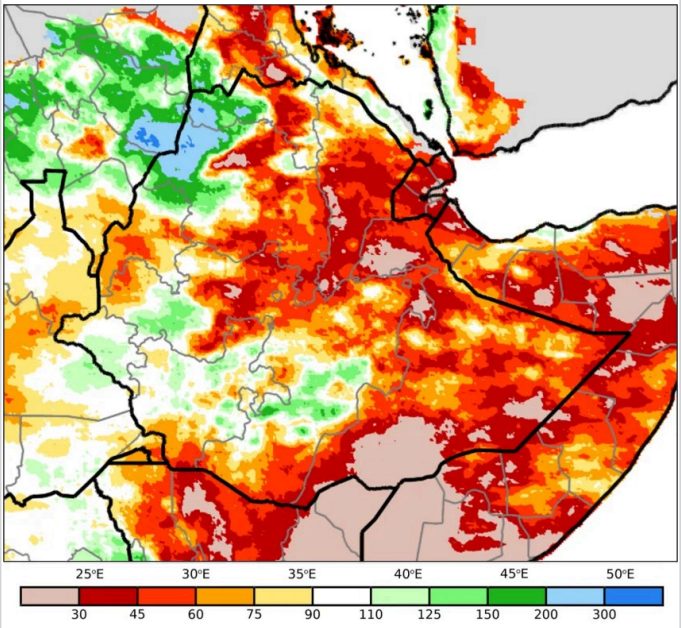
Vegetation as a percent of average for October 6-15, 2025



Source: United States Geological Survey (USGS)/FEWS NET

Figure 3

Rainfall as a percent of average for October 1-31, 2025



Source: UCSB/CHC

Now, the October to December *deyr/hageya* rains are delayed and already well below average through October (Figure 3). The **forecast for significantly below-average rainfall** marks a second or third consecutive poor season depending on the area.

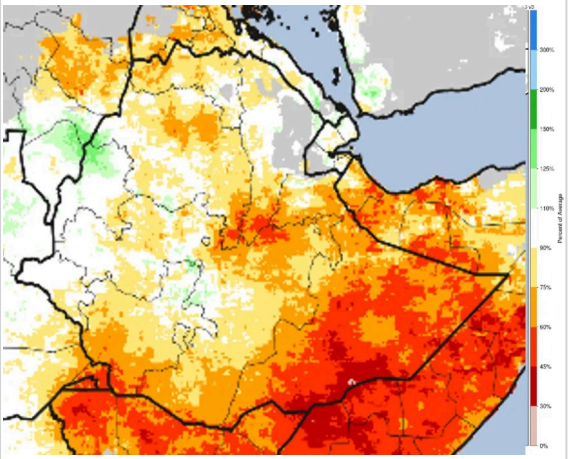
Forecast 2025 *deyr/hageya* and 2026 *gu/genna*

Weak **La Niña conditions began to develop in late September**, with forecasts indicating continuation through December 2025-February 2026. Typically, a **La Niña results in below-average rainfall in East Africa** from September through January. In January to March 2026, a transition to El Niño Southern Oscillation (ENSO)-neutral is likely and will likely last through at least May. Meanwhile, **the Indian Ocean Dipole (IOD) index** will remain negative through November 2025 before turning neutral. **A negative IOD also typically results in below-average rainfall** in East Africa.

The overlap of both La Niña with a negative IOD is likely to further aggregate early season moisture deficits, especially for the already delayed October to December 2025 *deyr/hageya* rains. Models suggest a **40 to 60 percent chance of below-average October to December rainfall** in southern and southeastern Ethiopia. When the rains do begin, they are expected to be significantly below average and with drought conditions likely (Figure 4). Above-average temperatures are also forecasted which will likely further dry out soil and vegetation through atypically high evapotranspiration. In pastoral areas, the combination of high temperatures and poor precipitation is likely to substantially reduce pasture quality and water access.

Figure 4

Forecast percent of average of October-December rainfall



Note, the analog was developed with several prior years that also had a La Nina (1995, 1995, 1998, 1999, 2010, 2016, 2020, 2021, 2022, 2024) both weak and strong, reflecting a degree of uncertainty in the model.

Source: UCSB/CHC

The outlook provided by the FEWS NET Agroclimatology Team, which focused on global and regional climate drivers, forecasted ENSO-neutral conditions to return in early 2026 as the March to May 2026 *gu/genna* season begins. As such, it is most likely that the March to May 2026 *gu/genna* season will be average; however, close monitoring will continue as seasonal forecast models evolve.

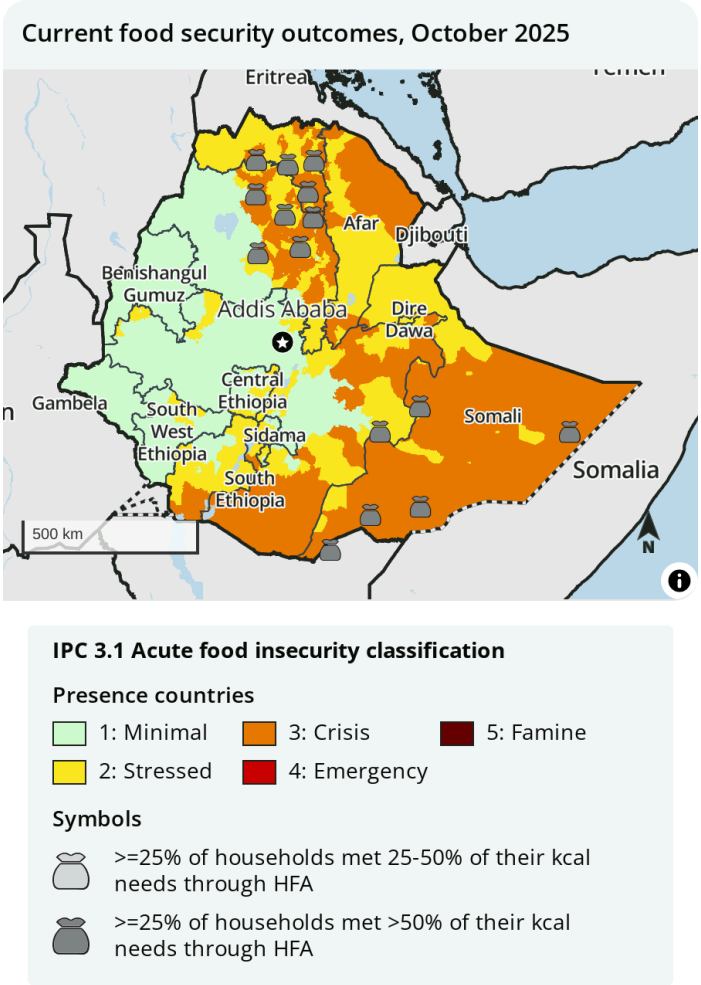
Impact on food security

Following a below-average October to December *deyr/hageya* season, pasture is expected to improve in the short term, providing only marginal support for livestock health and productivity into early 2026. Conditions are expected to worsen during the January to mid-March *jilaal* dry season. The onset of the 2026 *gu/genna* rains are likely to facilitate pasture regeneration and lead to modest improvements in livestock body condition. However, milk availability is likely to remain below average, constrained by small herd sizes and lingering effects of poor animal health affecting conception during previous seasons and births in 2026.

Poor households in pastoral and agropastoral zones are likely to continue to face constraints to accessing food and income, driven by below-average production, reduced livestock holdings, high staple food prices, lack of other income-earning opportunities, conflict-driven displacement, and poor countrywide macroeconomic conditions. **Crisis (IPC Phase 3) outcomes are projected to persist through May, with an increasing share of the population likely experiencing Emergency (IPC Phase 4).**

Annex 6: Projected acute food insecurity outcomes and areas receiving significant levels of humanitarian food assistance

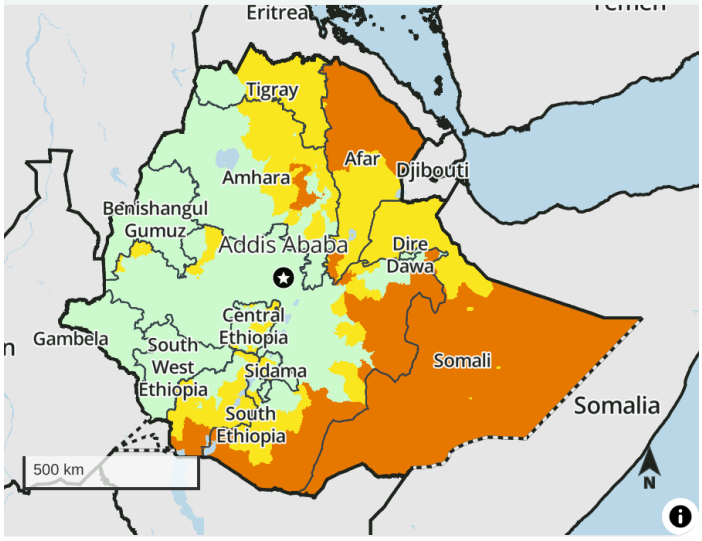
Each of these maps adheres to IPC v3.1 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🛍 indicates that at least 25 percent of households receive on average 25-50 percent of caloric needs from humanitarian food assistance (HFA). 🛍 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.



Mapped boundaries do not imply official recognition or endorsement of any physical or political boundaries.
FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners. For full disclosure, see endnotes.

Source: FEWS NET

Projected food security outcomes, October 2025 - January 2026



IPC 3.1 Acute food insecurity classification

Presence countries

- 1: Minimal
- 2: Stressed
- 3: Crisis
- 4: Emergency
- 5: Famine

Symbols

- >=25% of households met 25-50% of their kcal needs through HFA
- >=25% of households met >50% of their kcal needs through HFA

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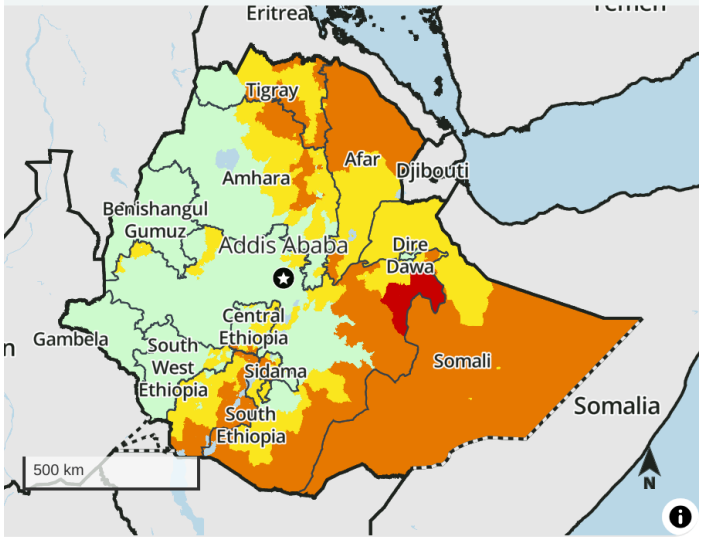
Source: FEWS NET

Projected food security outcomes, February - May 2026



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Source: FEWS NET

Recommended citation: FEWS NET. Ethiopia Food Security Outlook October 2025 - May 2026: Emergency (IPC Phase 4) likely to emerge in early 2026 in Oromia amid crop failures, 2025.

* FEWS NET's classifications are IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners. As of IPC 3.0, the IPC no longer assesses the impact of food assistance on classification and thus no longer maps the (!). However, FEWS NET continues to produce food security maps inclusive of the (!) as well as maps compatible with IPC 3.0/3.1, which include the mapping of food security assistance bags. FEWS NET and the IPC use different methods to estimate the total Population in Need of humanitarian food assistance and assess the risk of Famine. Learn more at **www.fews.net/about**.

Food Security Outlook

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more **here**.