ETHIOPIA Food Security Outlook June 2016 to January 2017

Meher harvests to improve food security in October, but Deyr rains may be below average

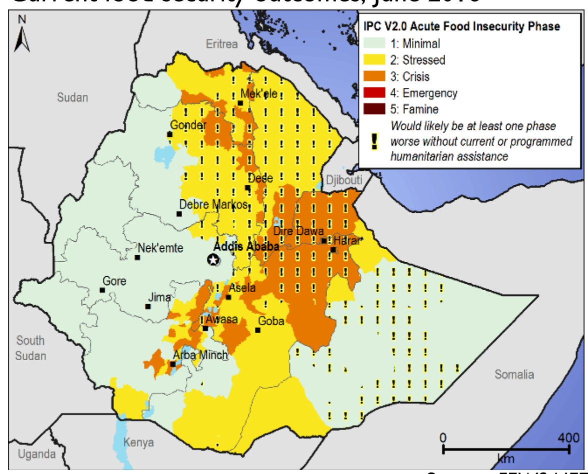
KEY MESSAGES

- More than 10 million people require emergency food assistance in 2016, following El Niño-induced drought in 2015. Worst-affected areas include Wag Himra, East and West Hararghe, and pastoral areas in Shinile and southern Afar, where Crisis (IPC Phase 3!) outcomes will continue through September.

- The number of people requiring emergency assistance should begin to decline significantly with the onset of *Meher* harvests in October 2016. Seasonal forecasts indicate 2016 *Kiremt* (June to September) rainfall will likely be above average in most agricultural areas, leading to prospects for average *Meher* harvests. Improvements in livestock body conditions, livestock productivity, and prices should also further improve household access to food and income.

- Excessive rainfall during the *Kiremt* season may trigger flooding that could temporarily displace households, damage crops and livestock, and temporarily limit humanitarian access to flood-affected areas.

Current food security outcomes, June 2016

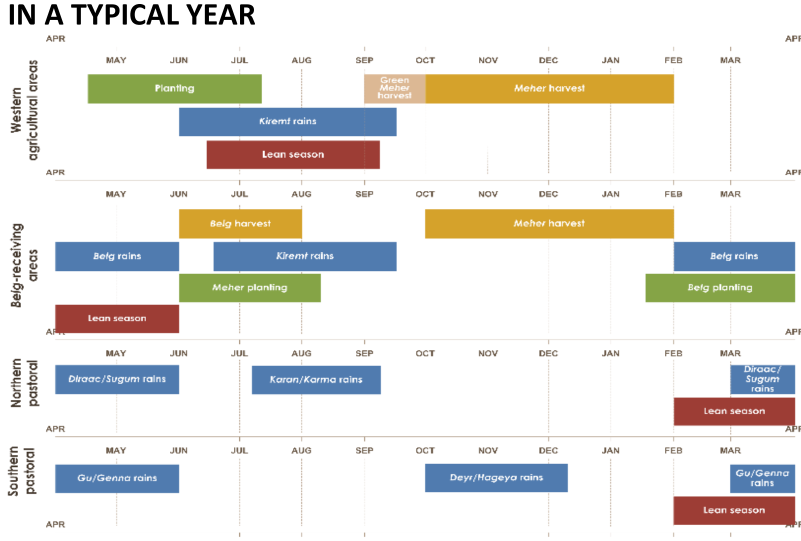


Source: *FEWS NET*

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. To learn more about this scale, click here. Descriptions of the five area phase classifications used in IPC v2.0 appear below.

- Seasonal forecasts and a high likelihood of a La Niña occurring during the 2016 *Deyr* season suggest rainfall will likely be below average in southern and southeastern pastoral areas. This will likely lead to poorer than usual generation of pasture and water sources, which will lead to earlier and worse than normal deterioration of livestock body conditions, reduced livestock productivity, and below-average livestock prices. In these areas, food security may deteriorate beyond the outlook period, particularly if the 2017 *Gu* (March to May) rains are also limited by La Niña.

SEASONAL CALENDAR IN A TYPICAL YEAR



Source: *FEWS NET*

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NATIONAL OVERVIEW

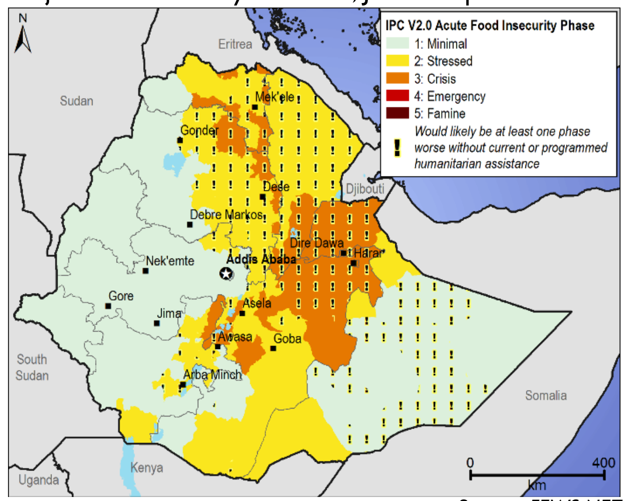
Current Situation

Belg (February to May) rainfall was late and unevenly distributed geographically in February and March, but was followed by well above-average rainfall from April through mid-May. Overall, cumulative seasonal rainfall totals were above average in most areas, except in parts of southern SNNPR and Amhara, where seasonal rainfall in some areas was between 50 and 80 percent of average.

Kiremt seasonal rainfall started on time in most central, western, and eastern parts of the country, and is just beginning in the northeastern part. The amount and distribution so far is normal, except in some parts of SNNPR, eastern Oromia, and northern Somali Region, where early season rainfall deficits have started to accumulate. Land preparation and planting of short maturing crops have started in some areas. The overall impact of the *Kiremt* rainfall performance so far is conducive for seasonal agricultural activities.

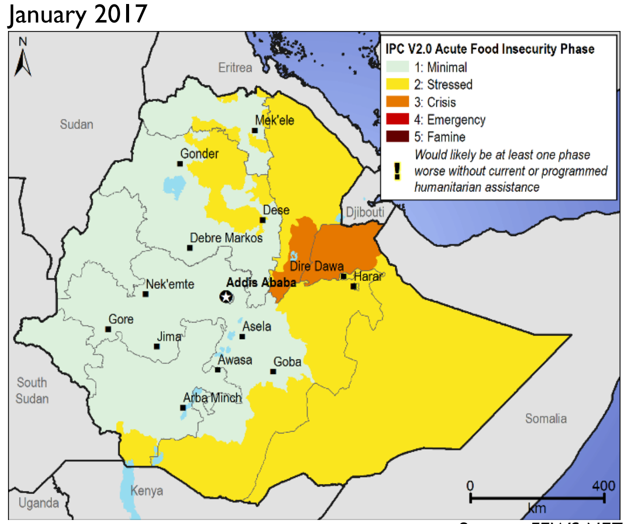
The increased rainfall was generally favorable for land preparation and planting activities for *Belg* crops normally harvested around June, as well as for planting of long-maturing crops such as maize, sorghum, and finger millet to be harvested during the *Meher*. In *Belg*-dominant areas of Tigray and Amhara, planting occurred on time, but was delayed by three to four weeks in SNNPR. Area planted is qualitatively estimated to be near normal, but the shortened growing season due to delayed planting in some areas, combined with floods due to torrential rains, and localized seed shortages indicate that *Belg* harvests will be moderately below average. Where planting was late, like in SNNPR, harvesting will be delayed by about a month, in July rather than in June. In marginal *Belg*-producing areas of eastern Oromia such as West Hararghe, households did not plant *Belg* crops and instead planted long-cycle crops to be harvested later in the *Meher* season.

Projected food security outcomes, June to September 2016



Source: *FEWS NET*

Projected food security outcomes, October 2016 to January 2017



Source: *FEWS NET*

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. To learn more about this scale, click here.

Torrential rainfall in April/May caused flash flooding and/or landslides in Southern Tigray, eastern Amhara, southern Afar, northeastern Somali, areas in SNNPR along the Rift Valley displacing around 200,000 people, disrupting some agricultural activities, and damaging infrastructure. Worst-affected households will likely need food and non-food assistance.

In pastoral areas, the recent *Sugum/Gu/Gana* (March to May) rains in Afar, most of Somali, southern SNNPR, and Oromia were generally good from early April and have recharged water sources and regenerated pasture and browse. Nearly all emergency water and livestock feed distribution programs have now stopped and there are no more abnormal deaths of livestock. Body conditions for shoats have largely returned to normal and larger animals such as cattle have started to show some improvement, but are not yet fully recovered. Total livestock holdings, births, and milk production remain low and will take several years, especially for cattle and camel, to return to normal levels. As pastoral conditions and livestock body conditions have improved, prices for livestock have also started to increase. In Shinile market, for example, shoat prices in April 2016 were 20 to 25 per cent higher than at the same time last year.

Though at a very high level, food prices are generally stable. The stability is largely due to the massive humanitarian assistance, and may also be due to lower than normal purchasing power. These prices are significantly higher than those of last year and the last five-year average. The national level food price inflation (source CSA) in May 2016 was 8.4 percent. The corresponding inflation rate for 2015 and 2014 were 10.1 and 6.3 percent, respectively.

As of June 22, 2016, the total humanitarian requirement of the country stood at USD 1.52 billion for all sectors. The share of the food sector is USD 1.1 billion, of which only USD 0.5 billion (46 percent) has been pledged. Humanitarian assistance programs to address food consumption gaps for populations affected by the El Niño-induced drought are underway, although there are concerns over the irregularity and late delivery of food distributions. Three rounds of relief food distributions have been completed so far and the fourth is in progress. The total caseload is 10.2 million people, with the NDRMC covering approximately 6 million people, the Joint Emergency Operation Program (JEOP) covering 2.8 million people, and WFP covering about 1.5 million people. Meanwhile, four to five rounds (out of six total) of PSNP assistance have been delivered to beneficiaries. Health and nutritional interventions are in full swing. Emergency seed distributions are also underway to households most in need.

At the national level, the number of children admitted to therapeutic feeding programs (TFP) for treatment of acute malnutrition has decreased in recent months, but is still higher than usual for this time of year. For example, the number of TFP admissions declined by six percent between March and April 2016, but April 2016 admissions were 10 percent higher than at the same time last year, and 11 percent higher than the recent four-year average. The atypically high number of admissions is likely due to a combination of the effects of last year's El Niño-induced drought, as well as a scale-up of treatment programming in order to meet an expected increase in needs. In general, improvements in recent months have been attributed to the various humanitarian interventions, including delivery of emergency food assistance, school feeding, and PSNP programming.

In areas worst-affected by drought in 2015, such as southern Afar, northern Somali, eastern Oromia, southern Tigray, and areas along the Tekeze catchment of Amhara and Tigray, households continue to face food consumption gaps and/or large livelihood protection deficits, even with ongoing assistance. In the absence of this assistance, poor households would be facing even larger food consumption gaps and a significant increase in acute malnutrition would be likely. Therefore, these areas are currently in Crisis (IPC Phase 3!). Areas where food access remains constrained, but in which food consumption gaps are less severe, include parts of central Somali and Oromia Regions, as well as northern SNNPR, which are currently in Crisis (IPC Phase 3). Humanitarian assistance is sufficient to cover food consumptions gaps for most households in need in large parts of northern Afar and eastern Amhara, and small parts of Tigray and central Oromia, which are Stressed (IPC Phase 2!).

In southern pastoral and agropastoral areas of Somali, southern Oromia (including Borana, Guji and lowlands of Balle), Southern SNNPR, livestock to cereal terms of trade have been increased since January 2016. In Liben and Warder markets, for example, terms of trade (TOT) between shoats and maize have increased by 43 and 49 percent between January and May 2016, respectively. The good seasonal rains in the last two years and the near-average *Gu* 2016 rains have improved food and income from livestock production, enabling most households to meet their food consumption needs. In addition, the Government of Ethiopia is assisting food-insecure households using Emergency and PSNP resources. These areas are currently at **Minimal (IPC Phase 1!)** or at **Stressed (IPC Phase 2**).

Assumptions

The most-likely scenario from June 2016 to January 2017 is based on the following national-level assumptions:

- *Belg* harvests will be moderately below average due to below-average early seasonal rainfall, the delayed start of season in some areas, excessive rainfall and flooding in some areas, seed shortages, and the impact of expected above-average *Kiremt* rainfall in July on late-planted *Belg* crops for which harvests are delayed.

- Based on the high (64 percent) likelihood for a La Niña to develop by the July-August-September period, and based on NMA, NMME, and ECMWF seasonal forecasts, cumulative June to September 2016 *Kiremt* rainfall is likely to be above average in Tigray, parts of northern Afar, Amhara, Benishangul-Gumuz, Gambela, and western Oromia. In the remaining *Kiremt*-benefiting areas, average rainfall totals are likely (Figure 1). Between October and December 2016, *Deyr* rainfall in southern and southeastern pastoral areas is likely to be 10 to 25 percent below average, according to USGS/FEWS NET analysis of seasonal forecasts and historical weak to moderate La Niña events (Figure 2).

- In July/August, when *Kiremt* rains reach their peak, flooding in flood-prone areas is likely to be more extensive and severe than in a typical year and will likely temporarily displace households, damage crops and livestock, and temporarily limit humanitarian access to flood-affected areas.

- *Meher* harvests starting in October 2016 are likely to be near average. Although the ongoing *Kiremt* rains will generally be favorable for agricultural production, some seed shortages, weakening of plough oxen, and expected excessive rains during the season are likely to limit production prospects beyond what is typical.

- Market supply of cereals between June and September will be below the seasonal average in nearly all of the country because of the poor 2015 *Meher* harvest, although the government will likely release approximately 600,000 MT of imported wheat stocks in an attempt to maintain stable prices. Expected near-average *Meher* production will increase market supply to near-normal levels from October through at least the end of the outlook period in January.

- Prices for locally produced staples, such as sorghum, maize, barley, and teff will peak as usual during the June to September lean season, but will be at higher-than-normal levels due to the impact of consecutively poor harvests in 2015. Between October and January, prices will begin to decline seasonally as expected average *Meher* harvests increase market supply and reduce household demand on markets.

- In most areas, shoat prices are likely to be at normal levels through January, as their body conditions have mostly recovered. However, cattle prices are likely to remain below average between June and September, before improving to average levels between October and January as their body conditions return to normal. In southern and southeastern pastoral areas that typically receive *Deyr* rainfall between October and December, livestock prices will decline atypically early and more than usual, as below-average pasture and water conditions begin to impact their market value.

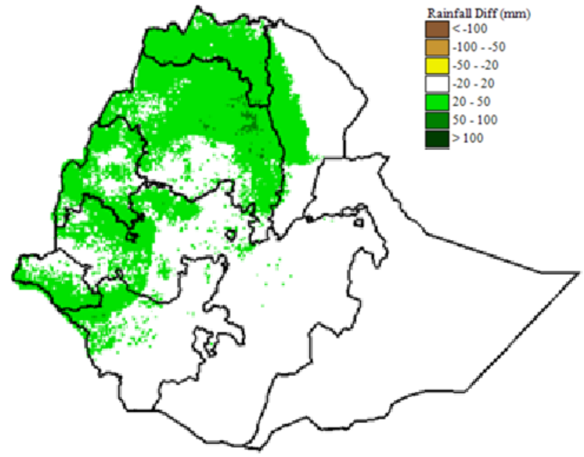
- Agricultural labor opportunities, wage rates and incomes will remain normal throughout the outlook period in most cropping areas.

- Formal and informal exports and imports across all borders are expected to function normally, with minimal or no insecurity and no policy restrictions limiting cross-border trade.

- GAM prevalence is likely to show atypical seasonal rises during the main lean season (June to September) in areas worst affected by 2015 drought, with seasonal declines likely during the October to December post-harvest period in most areas of the country.

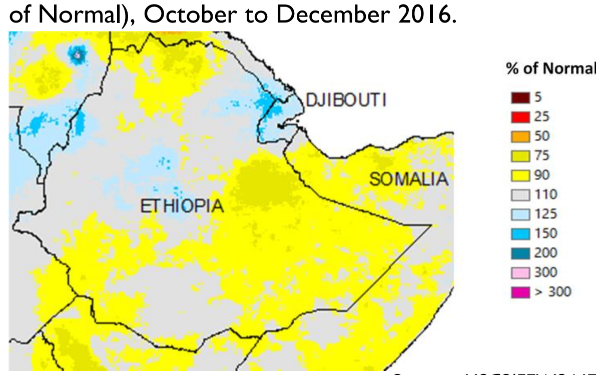
- Despite estimated 10 to 25 percent pipeline breaks for beneficiaries under Government operations, the overall food assistance for the current caseload is likely to continue through September. JEOP resources will last through December 2016, but complete pipeline break are likely beyond September for GOE and WFP programming.

Figure 1. Seasonal Rainfall Anomaly Forecast (mm), June to September 2016.



Source: *USGS/FEWS NET*

Figure 2. Seasonal Rainfall Anomaly Forecast (Percent of Normal), October to December 2016.



Source: *USGS/FEWS NET*

Most Likely Food Security Outcomes

The effects of the 2015 drought are likely to continue until the start of *Meher* harvests in October 2016, particularly in crop dependent areas. These include lowlands of East and West Hareghe in Oromia, eastern Amhara, southern Tigray, areas along the Tekeze catchment of Amhara and Tigray, and along the rift valley in SNNPR. These areas are likely to be in **Crisis (IPC Phase 3!)** or **Stressed (IPC Phase 2!)** through September. With the expected near-average *Meher* harvest, access to food is highly likely to improve from October onwards. Expected decline in staple food prices and increased income from agricultural labor will also contribute to improvement in food access by poor households. Therefore, these areas will move to **Minimal (IPC Phase 1) or Stressed (IPC Phase 2).**

In southern Afar and northern Somali, massive livestock deaths left most households' livestock assets very low, limiting their access to income from the sale of livestock, livestock products, and labor for better-off pastoral households. As several good years may be required before livestock (particularly cattle) body conditions, births, productivity, and herd sizes fully improve, households in these areas will likely continue to face some food consumption gaps even into the second outlook period. Therefore, these areas will remain at **Crisis (IPC Phase 3!)** through September 2016, with slight improvements to **Crisis (IPC Phase 3**) from October 2016 to January 2017. Likewise, with much better pasture and water availability following the coming *Karma* rains in July and August, livestock production in northern Afar is likely to improve further, such that these areas will move from Stressed **(IPC Phase 2!)** to Stressed **(IPC Phase 2)** from October 2016 to January 2017.

In southern pastoral and agropastoral areas of Somali, southern Oromia (Borana, *Gu*ji and lowlands of Balle), Southern SNNPR, good rainy seasons in the last two years coupled with the near average *Gu* 2016 rains have improved food and income from livestock production. Most households are able to fulfill their food consumption from their own resources. As a result, some of these areas are likely to continue at **Minimal** (IPC Phase 1!) with humanitarian assistance while others will be **Stressed (IPC Phase 2)** from June to September. On the other hand, June through September is normally a dry season. This will be followed by the forecasted below-average October to December rainfall. These two combined will produce unusually long dry conditions that lead to below-average availability of pasture and water, weak livestock body condition, and reductions in both milk production and market values of animals from October onwards. As a result, most households will fulfill their food requirement but will be unable to afford some of their essential nonfood expenditures. Therefore, most of these areas are likely to be at **Stressed (IPC Phase 2)** from October to January 2017. In south-eastern pastoral areas, food security is likely to worsen beyond January due to below average seasonal rains in October-December2016, aggravated by the normal dry condition through March.

Most households in the western half of the country, particularly highland areas of SNNPR, and western Oromia, Amhara, Tigray, SNNPR as well as the entire Gambela and Benishangul Gumuz regions are likely to maintain adequate access to food. This considers carryover stocks from previous harvest and the expected good *Meher* harvest from October. The current *Kiremt* season is expected to improve livestock body condition, milk yields and calving rates. Additionally, income from agricultural labor will increase as labor opportunities improve. Therefore, these areas are likely to be at **Minimal (IPC Phase 1)** throughout the scenario period.

AREAS OF CONCERN

Afar and Sitti (formerly Shinile) Zone in northern Somali Region

Current Situation

The *Sugum/Dirra* (March to May) rains this year performed well in April and early May. The geographic coverage of rains was average but the intensity much above average. According to the RFE data, received the rainfall this year was approximately 50 percent higher than the 2001-2010 average, and more than 400 percent higher during the same period last year. In a recent survey undertaken in southern Afar, community members rated the performance of the seasonal rains excellent.

Torrential rainfall in April/May induced flash floods in Afar that originated from neighboring highland areas of Oromia and Amhara regions. The floods affected several woredas in the region, including Abala, Koneba, Megale, Berhale, and Dalol (Kalbti Zone); Milie (Awasi Zone); Amibera, Dulesa, Buremoditu and Gewane (Gabi Zone); and Teru (Fanti Zone). Among the effects are damage to water schemes and pipelines, deaths of livestock, loss of household assets, and temporary displacement of people.

Good rains in April and May brought huge improvement in pasture and browse availability in nearly all areas. Potential rangelands like Halidge, Alta, Liyasis, Molale. Kelo, Teru, Awara, Duba and Halaytem have shown substantial improvement in pasture and browse regeneration. This improvement has several positive consequences: all emergency livestock feed interventions are totally terminated, most livestock that made long distance migrations in search of pastoral resources are now back home, and livestock body conditions, especially those of small animals, have significantly improved. Household herd sizes low, especially of cattle and sheep, as birth rates have not yet improved sufficiently for herd sizes to be reconstituted. Herd sizes also remain low due to abnormal deaths earlier in the year and excessive sales associated with drought during the previous months. According to information obtained from elders in Gewane, Amibara and Awash Fentale woredas of Gabi zone in Afar region, holdings of camel, cattle and shoats have reduced by about 10, 30, and 25 percent, respectively, compared to normal. Current birth rates are generally low, but those of goats have shown better performance compared to other livestock species.

The recent good rains have helped recharge most of the water sources in Afar and northern Somali. Consequently, most emergency water tracking operations have ended. For instance, in Afar region, 38 water trucks were engaged in water rationing in March 2016, but their number went down to nine in June 2016. Water availability is unlikely to cause serious concern until the start of short rains in March 2017. There are, however, areas in chronically water insecure woredas that have continued to face water shortages.

Market supply of cereals is currently normal. The on-going humanitarian food assistance has greatly contributed the stability. However, the prices of cereals are showing mixed patterns. Maize prices in May 2016 in Awash Fenate, Abla and Shinle markets dropped by 27, 29, and 25 percent compared to the same month last year. However, maize price in May 2016 in JIjiga market increased by 24 percent compared to the same period last year while sorghum price in Jijiga and Shinile markets in May 2016 dropped by nearly 10 percent as compared to the same period last year.

On the other hand, the Ramadan fasting season has increased the demand for shoats. As a result, the market supply of shoats has slightly increased compared to past few months. Livestock market prices have also continued rising as a result of improved demand and body conditions. For instance, in May 2016 prices of an average-sized shoat in Awash Fenate, Abaala and Shinile markets increased by 44, 56, and 50 percent as compared to the same period last year. With food prices remaining somewhat stable, the recent increases in livestock prices have helped the terms of trade increase significantly. For instance, the terms of trade (TOT) between shoat and maize in May 2016 has shown a 36 percent increase over January 2016 in Shinile.

Slight improvements in the nutritional situation has been observed since February 2016. This is attributed to a combination of the on-going humanitarian food assistance, improved access to shoat milk, better availability of water for drinking, and recent improvements in terms of trade between livestock and cereals. In Afar region, for instance, total TFP admissions in April 2016 declined by about 44 percent from March 2016.

Currently, milk access from cattle and camel is below average as births are low. Increased livestock prices, especially of shoats, in recent few months has also improved income from livestock sales. Though the TOT has shown a significant increase since January, the income from livestock sales has not enabled households to fully address their food gaps through purchases because of declined holding. Therefore, poor households in northern Afar are currently in Stress (IPC Phase 2!). Similarly, Sitti Zone and the southern parts of Afar remain in Crisis (IPC Phase 3!)

Updated Assumptions

In addition to the national assumptions, the projected food security outcomes for Afar and Sitti Zone in Somali Region are based on the following assumptions:

- Based on national (NMA) and global (NMME,NMME, IRI) forecast for the period June to September, the *Karma* seasonal total rainfall is likely to be above average in the northern Afar and average in southern Afar.
- Staple food (maize and sorghum) prices are likely to be at higher than usual levels, but will remain stable through September thanks to continued humanitarian food assistance. However, from October onwards, prices are likely to start to decline with the expected start of harvests in neighboring crop producing areas.
- Livestock births or reproduction will remain low for bigger animals (cattle and camels).
- Availability of milk and milk products, especially from cattle and camel, will remain below normal during the entire assumption period.
- As full recovery of herd sizes takes several seasons of good rains, herd sizes will remain low because of reduced births and high off-take rates during the peak of the drought last year.

- Opportunities for self-employment and agricultural wage labor will continue to be low throughout the outlook period since large farms that once provided some local labor are no longer in operation.
- Livestock body condition will continue to improve throughout the outlook period. This will in turn improve availability of livestock products (milk, butter, ghee and meat) as well as market value of livestock. Nevertheless, availability of livestock products, even from shoats, will remain below normal, as births are low.
- Despite improvements in expected prices of livestock, overall incomes from sales of livestock and livestock products will be depressed due to reductions in the number of marketable livestock.
- However, they are likely to show some improvement during the second scenario period as there will be increased births, more improvements in body conditions of all types of livestock, and prices of food grains will go down with the start of *Meher* harvest.

Most Likely Food Security Outcomes

Social support and ongoing humanitarian food aid assistance are currently the main food sources for poor households. Income from sale of livestock is lower than usual, as is income from self-employment and labor as sales of firewood and charcoal are prohibited by the Afar regional government. In addition, several large-scale farms that used to provide some agricultural labor have closed operations, leading to further reductions in labor opportunities in the zone. Hence, household food access from both own production and purchases is expected to remain low. In worst-affected areas of southern Afar and Sitti Zone of Somali Region, poor households will remain in Crisis! (IPC Phase 3!) through September. Between October 2016 and January 2017, increased livestock productivity and cash income from sale of livestock will maintain households in Crisis (IPC Phase 3), despite the humanitarian assistance pipeline break. Households in central and northern Afar will continue to face livelihoods protection deficits and will remain in Stress! (IPC Phase 2!) from June to September 2016, thanks to the presence of humanitarian assistance, and will be able to maintain Stressed (IPC Phase 2) between October 2016 and January 2017.

Eastern Amhara and Tigray: northeastern lowlands and midlands in North Wollo, South Wollo, Oromia, and North Shewa Zones in Amhara, Southern Tigray, and Eastern Tigray

Current Situation

The February to May 2016 *Belg* rains were below average and sporadic in the first two months, but the quantity and distribution of rainfall was much better from early April through mid-May in most parts of Amhara and Tigray Regions. These rains were confined in the western parts during the second half of May. Heavy rainfall in April and May induced localized floods in some parts, resulting in some loss of life and property damage, but overall the floods were not significant enough to affect food security at the zone level.

Currently, farmers are busy in land preparation and planting of *Meher* crops, which will continue through July. Soil moisture in April and May favored timely land preparation and/or planting of long-cycle *Meher* crops in both Amhara and Tigray regions, enabling completion of planting of sorghum in a timely manner. The increased rainfall has also improved pasture and water availability for livestock, leading to improved livestock body conditions, especially for shoats. However, impact of El Niño-triggered drought still persists on cattle, which are still in below average body condition and recovery is particularly slow in some highly affected lowland parts of eastern and northeastern parts of Tigray and Amhara. So far, no livestock disease outbreak is reported in either Amhara or Tigray Regions.

Market prices in May 2016 for major staples were either stable or showing a very slight increase compared to the preceding months. However, prices are higher from last year and the last three year average. In Mehal Meda market in North Shewa zone of Amhara Region, for example, the price of sorghum in May 2016 (1080 birr per 100kg) was higher by 12 and 16 percent from last year and the recent three-year average, respectively. On the other hand, livestocsk price in May showed a slight decline from April 2016 following the completion of main holidays in April. Prices for livestock, especially for cattle, were lower in May 2016 that at the same time in 2015. Meanwhile, shoat prices in Mehal Meda and Fitche declined by about five to eight percent in May 2016, compared to the previous month.

Humanitarian assistance is going on a regular basis since March 2016. As of May 2016, the emergency needy population in most of Tigray and Amhara regions has received three rounds of food assistance and the fourth round is being transported.

Likewise, PSNP beneficiaries have received four rounds of food and cash transfers since beginning of year. The ongoing extensive nutrition and humanitarian interventions have enabled the malnutrition situation to be either stable or somewhat lower since December 2015. For instance, TFP admissions in Tigray Region in April 2016 (811) were 19 percent higher from April 2015 but 15 percent lower than those of December 2015.

Currently, most poor households in eastern Amhara and Tigray Regions dominantly rely on emergency relief food and PSNP assistance. Although staple food prices are stable, lower cash income access constrained poor households' food access from market purchase. Thus, with the contribution from massive relief food assistance, poor households in severely drought affected woredas along the Tekeze river catchment and lowlands plains of eastern Amhara and Tigray Regions are currently on Crisis (IPC Phase 3!). Other areas currently remain in Stressed (IPC Phase 2!).

Assumptions

In addition to the national assumptions, the projected food security outcomes for Eastern Amhara and Tigray Regions are based on the following assumptions:

- The national (NMA) and global (NMME,NMME, IRI) weather forecasts indicates that June to September *Kiremt* rains are likely to be above average in Tigray and northern Amhara whereas average in southern Amhara.
- Prices of maize and sorghum, the key staple foods, are likely to remain stable but at higher than usual levels through September, before starting seasonal declines in October as Meher harvests begin to arrive on markets.

Most Likely Food Security Outcomes

Well below-average *Meher* 2015 crop and livestock production due to El Niño substantially affected poor households' access to food and income. Poorer households in north-eastern Amhara and Tigray are likely to continue to face large food deficits as a result of an already exhausted household food stocks and lower food access from purchases due to higher than normal staple food prices between June and September 2016. Households in the severely drought-affected areas along Tekeze river catchment and lowlands in the eastern plains of Amhara and Tigray are likely to remain in poor nutritional situation. However, likely available emergency food assistance and PSNP transfers is anticipated to bridge significant portions of their food deficits. Thus, poor households in woredas along Tekeze river catchment and lowlands in the eastern plains of Amhara and Tigray will likely remain in Crisis (IPC Phase 3!), while better-off areas are likely to be in Stressed (IPC Phase 2!) from June to September 2016.

However, poor households' food and cash income access is expected to start to improve beginning October 2016 as the majority of households are likely to replenish their food stocks with near-normal *Meher* 2016 harvests. Moreover, normal cash income from livestock sale and labor employment coupled with a likely decline in cereal prices are expected to improve and move poor households into No (IPC Phase 1) acute food insecurity from October 2016 to January 2017. However, poor households in hardest-hit woredas along Tekeze river catchment and lowlands in the eastern plains will still be unable to significantly improve in a single season due to excessive livestock sale and death during the 2015/16 consumption year. Therefore, these areas are likely to remain Stressed (IPC Phase 2) between October 2016 and January 2017.

Eastern and Central Oromia: East and West Hararghe, East Shewa, North Shewa, and West Arsi Zones

Current Situation

Belg rainfall between February and March 2016 was well below average and highly sporadic, and generally insufficient to perform agricultural activities, such as *Belg* planting, in central and eastern Oromia. Due to inadequate soil moisture during planting, area under *Belg* crops this year is reportedly negligible in North Shewa zone, and in marginal *Belg*-production areas such as West Hararghe, little or no crops were planted for the *Belg*. Rainfall improved significantly in April with above-average rainfall, which was generally beneficial for crop production in areas where planting did occur. Heavy rainfall until early May produced floods and landslides with adverse impacts like loss of human lives and damage to property and infrastructure in Arsi, West Arsi, East Shewa, and Bale zones. In Golocha of Arsi Zone, for example, flooding killed several people, washed away 190 houses, damaged 6,235 ha of crops, and damaged five bridges.

Due to a delayed start of season, *Belg* planting was pushed back by four to six weeks. Moreover, land preparation was constrained by a shortage of seeds and weakened drought power. The seed shortage has been addressed to some extent by emergency seed support from government, FAO, and NGOs. On the other hand, normal to above normal moisture in the month of April favored the timely planting of long-cycle *Meher* crops in both central and eastern Oromia. Land covered with long-cycle sorghum and maize in East Hararghe is about 54 percent of land planned for *Meher* crops during the year, which is generally normal for this time of the year.

Improved moisture in April and May has significantly improved pasture and water availability for livestock in central and eastern Oromia. Prior to the rains in April, severe livestock feed shortages had led to livestock deaths (mostly cattle) in eastern Oromia, despite emergency feed support by government and NGOSs. Body condition of shoats and camels has recovered but that of cattle is still below average. Livestock that had been migrated away from the zone to in search of pasture and water in river valleys have now returned to the zone.

Market supply of major staple foods is normal, for which the ongoing massive humanitarian assistance and increased supply from surplus-producing western areas are partly responsible. Similarly, prices are showing a stable trend in past few months. In Chiro market in West Hararghe zone, maize prices remained at 700 birr/100kg from February to April 2016. Likewise, in Shashemene market in central Oromia, maize prices in May have shown only a four per cent increase since January 2016. However, May 2016 prices were higher than same time last year. For example, maize price in May 2016 exhibited 10 and 25 percent increase from those of May 2015 for Shashemene and Chiro market respectively. However, the price of groundnut has doubled due to supply shortage in eastern Ormomia. Livestock prices are generally stable in recent month. In eastern Oromia, livestock prices are stable but at lower level. In other words, livestock prices in eastern Oromia are lower compared to last year. In Chiro market, goat price in May 2016 (550 birr per head) was 21 per cent lower than May 2015.

Household access to cash remains low, although livestock body conditions are starting to improve prospects for increases in income from the sale of livestock later in the year. June is also a month when agricultural labor employment opportunity, sale of firewood and charcoal are seasonally low, although households continue to earn some income from casual labor.

Emergency food assistance and PSNP transfers remain underway in both eastern and central Oromia, with the fourth round of emergency assistance now underway. the emergency food assistance completed for three rounds and fourth round is underway. PSNP cash and food transfers are complete for five out of the planned six months in 2016. The issue of limited water access has now improved significantly and currently most emergency water operations have ended.

Poor households in severely affected areas of the majority of East and West Hararghe zone, some lowland woredas in West Arsi and Arsi zones still suffer increased food consumption gaps. Despite a slight improvement in cash income from livestock and chat sales, the benefits mainly go to middle and better-off households. Currently, poor households are in Crisis (IPC Phase 3!) with humanitarian assistance covering a significant portion of their food consumption gaps. a significant portion of poor households' food consumption gap is covered from humanitarian food assistance. Meanwhile, some better off woredas in North Shewa zone remain in Stressed (IPC Phase2!).

Assumptions

In addition to the national assumptions, the projected food security outcomes for eastern and central Oromia Region are based on the following assumptions

- As per both national (NMA)and global (NMME,NMME, IRI) seasonal forecasts, *Kiremt* (June to September) seasonal rainfall is likely to be average in central and eastern part of Oromia
- Prices for key staples (maize, sorghum, and wheat) will likely increase through September, and then show declines starting in with the expected start of both green and dry harvests of *Meher* crops.

Most Likely Food Security Outcomes

Failure in *Meher* 2015 crop and livestock production due to El Niño substantially affected poor households' food consumption level. No major improvement in household food access is likely until the next *Meher* 2016 harvest comes in October through December 2016. Poor households in severely drought-affected areas including majority of East and West Hararghe zone, some lowland woredas in West Arsi and Arsi zones will continue relying on the likely available emergency food assistance and PSNP transfers until the next harvest. Thus, households in these areas are likely to continue to be in Crisis (IPC Phase 3!) during June to September 2016.

With the anticipated normal *Meher* 2016 crop production in October to December, and associated increases in food and income sources from agricultural labor and livestock production, households' food access from own production and market purchase is likely to improve. Therefore, poor households in central Oromia should be able to meet their food and non-food needs and are likely to be in None (IPC Phase 1) from October 2016 to January 2017.

Food access for poor households in eastern Oromia is expected to improve significantly, but the contribution of crops sales alone, in the absence of improvements in income from sale of livestock and livestock products, is likely to be insufficient to cover livelihoods protection needs. As a result, these areas will likely improve to Stressed (IPC Phase 2) from October 2016 to January 2017.

SNNPR: Lowlands of Sidama, Gamo Gofa, Wolayita, Hadiya, Kambata Tambaro, Gurage, and Silte Zones, and Halaba Special Woreda

Current Situation

Belg rainfall began three to four weeks late in this zone and was below average until late March. Starting in April, rainfall improved significantly and lasted until mid-May. The rains during the second half of the season were heavy and continuous, resulting in flash floods and landslides in many places, especially in the northern, central, and eastern parts of the region. Floods affected at least 25 woredas, particularly *Gu*rage, Silte, Wolayita, Hadiya, Kambata Tambaro, Sidama, and Halaba Special Woreda, where floods killed people and livestock, damaged crops and infrastructure, and temporarily displaced some residents. The gradual decline in amount and distribution of the rains between mid-May and early June brought much-needed relief in most parts of the region.

Due to the late onset of *Belg* rainfall, most *Belg* crops were planted at least four weeks later than normal. For example, normal *Belg* planting takes place from mid-February to mid-March, but this year around 70-80 per cent of the planting occurred in April. In addition, the quality of land preparation was limited as farmers were forced to reduce the normal frequency of ploughing. However, the long maturing *Meher* crops in Gurage, Silte and Halaba special woreda were planted in April and May, as is typical.

Maize and sweet potato, two of the most important *Belg* crops in these areas, are either nearing harvest or being harvested, while most other *Belg* crops are in vegetative to early flowering stages. Excessive rainfall in April and drier conditions in late May moderately affected development of maize and haricot beans. Crops were particularly affected by excessive rainfall mid and high altitudes. Sweet potato yields are generally about average, but production will be much lower than normal due to the decline in area planted resulting from a shortages of cuttings and damage due to flooding and landslides.

Although rains were below average in February and March, existing moisture helped improve pasture and water availability. Above-normal rainfall in April and May alleviated water shortages in most parts of the region. As a result, livestock condition, production and productivity has improved.

Grain prices in most local markets of the region are higher than usual for this time of year. For example, the wholesale price of maize in Sodo market was 13 percent higher in May 2016 than the recent two-year average. Prices for maize will likely continue to rise longer than is typical, into July, due to the likely delay in Belg harvests in this zone. The price for pulses are particularly high, with retail prices of fava bean and field pea 48 per cent higher than the same month last year. The increase in prices of both grain and pulses is associated with the seasonal decline in market supply as the month of May is the peak of lean season.

Availability of fresh harvests in recent times combined with distributions of resources from various humanitarian assistance programs (PSNP, emergency, and TSF) have helped protect household food access from further deterioration and stabilize the nutrition outcomes in the region. The number of children admitted to Therapeutic Feeding Programs (TFP) in April declined by about 13 and 31 percent compared to the previous month and same month last year, respectively. The admission in April was, however, 6 per cent higher than the recent five-year average.

Poorer households have already exhausted their stocks from the previous seasonal harvest. The main *Belg* harvest, usually expected in June, is delayed due to delays in planting this year. The only new harvest currently available is from vegetables and sweet potato that have brought slight improvement in household food access, but do not adequately cover their food needs. Income from labor and other income sources like sales of firewood and charcoal have declined due to increased market supply. Moreover, prices of staple foods are abnormally high. Given all these, most households in these areas are unable to meet their basic food needs, and are in Crisis (IPC Phase 3).

Assumptions

- The anticipated normal start, amount, distribution and cessation of *Kiremt* 2016 rains generally point to a favorable *Meher* season this year. Land preparation and planting of short maturing *Meher* crops are expected to progress normally.
- However, heavy rainfall during the season might cause water logging in some mid- and high-land areas and flooding in some flood-prone areas, including Loka Abaya of Sidama, Humbo of Wolayita and Shashego of Hadiya. This will damage crops and likely to cause crop yield reduction in some localized areas.
- Despite the expected crop damage in some localities, the overall seasonal performance is likely to support near-average *Meher* production, with on-time harvests in November and December. This will significantly improve household food access from November through at least January 2017.
- Seasonal rainfall June to September, in combination with the improved availability of crop residue from *Belg* and *Meher* harvests, will contribute to seasonal improvements in livestock body conditions, milk production, and livestock prices, which will be at seasonally typical levels levels. Livestock prices are also likely to show slight increases in connection with the Ethiopian New Year and other religious holidays. Together, these factors will improve household income from livestock sales, which contributes about 30 percent of total income for all wealth groups in the region.
- Agricultural labor opportunities are likely to improve as weeding of *Meher* crops gets underway. However, since the *Belg* harvest will be late by at least a month, the extension of the lean season will cause unusual increases in the number of people searching for agricultural labor, which may limit incomes from this source for some households. However, with the start of *Belg* harvests at the end July, the situation is likely to come back to normal through the *Meher* harvest in November and December.
- Supply of cereals on markets will remain minimal until *Belg* harvests begin to reach markets from August 2016. However, starting in August 2016, the prices of staple foods are likely to be stable due to increased household food access from the fresh *Belg* harvest and declines in purchases. Following the anticipated average *Meher* harvest starting October, an increase in grain supply to the market is expected.
- Agricultural labor opportunities and labor wages are likely to be improved from Au*gu*st onwards due with the start of *Belg* harvest and continuation of normal *Meher* crop cultivation and harvesting through December 2017 and beyond.

Most Likely Food Security Outcomes

Although *Belg* harvests are expected to be moderately below average, own-produced food in *Belg*-growing areas is likely to improve household food access from the end of July onwards. With production from previous seasons already exhausted, most households will rely on below-average harvests of sweet potato, maize, Irish potato and vegetable production, as well as small scale purchases and humanitarian assistance from now through August 2016. The expected decline in income from labor and other sources, coupled with anticipated staple food price increases in July, will limit households' ability to purchase adequate food on the market. As a result, the majority of poor and very poor households will continue to face significant food consumption gaps in June and July. However, with anticipated start of *Belg* harvest toward the end of July, households' food access from own production will improve. This along with humanitarian assistance is expected to meet households' food needs. Therefore, most lowland parts of Sidama, Gamogofa, Wolayita, Hadiya, and Kambata Tambaro are likely to move from Crisis (IPC Phase 3) to **Stressed (IPC Phase 2!)** from end of July through September 2016. In most parts of *Gu*rage, Silte and

Halaba, however, no harvest is expected prior to October. Hence, their food consumption gaps will continue to be high and the areas are likely to remain at **Crisis (IPC Phase 3)** from June through September 2016.

Following the expected green harvest in October and fresh *Meher* harvest in November and December, improvements in household's food access is likely. Income from labor will be back to normal and staple food prices will start to decline slightly during this period, enhancing the purchasing power of the market-dependent households. Therefore, these are likely to show significant improvement and will be at Minimal (**IPC Phase 1)** from October 2016 to January 2017. Following the anticipated *Belg* harvest toward end of July and that of *Meher* in November and December, most households will be able to increase food access from their own resources. This will significantly improve nutritional status of most households in the region from August 2016 through January 2017 and beyond.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Area	Event	Impact on food security outcomes
Crop-producing areas	Main season *Kiremt* rains are below normal rather than normal or above normal	*Meher* harvest will be low, livestock conditions, productivity and production will decline, agricultural labor income will be minimal, resulting in increased food consumption gaps by poor household in the last quarter of the year and beyond
	Kiremt rains become excessively heavy and are accompanied by severe and extensive flooding, water logging and hailstorms, and withdraw unusually late	Although it will be generally good for livestock production, damages on *Meher* crops will be huge leading to below average harvests, incomes from agricultural labor will be limited, large populations will be displaced, household assets will be damaged or lost. Access to food and income will decline and humanitarian assistance needs will increase
Pastoral areas	The Oct – Dec rains are normal or above normal	If so, areas would experience good rainy seasons in succession and this would greatly enhance food security (improved access to milk and milk products, livestock would sell at better prices thus improving household food and income
Nationwide	Delays in humanitarian assistance and/or in the distribution of PSNP resources	As we are now in the main lean season, such irregularities would widen existing food consumption gaps of poorer households in drought affected areas
Nationwide	Availability of timely and adequate resources to address the existing resource gaps	There would be no critical food gaps, level of malnutrition would reduce hugely,

ABOUT SCENARIO DEVELOPMENT

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 six months. Learn more here.