

ETHIOPIA Food Security Outlook

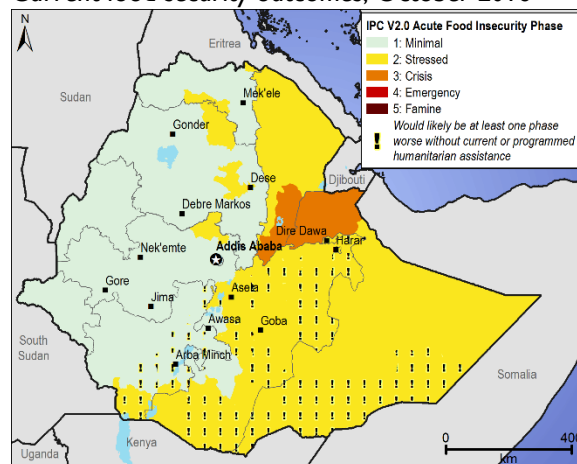
October 2016 to May 2017

Crisis (IPC Phase 3) expected in parts of Oromia, SNNPR, and southern pastoral areas

KEY MESSAGES

- *Meher* harvests starting in October are significantly reducing the number of people in Crisis (IPC Phase 3) or worse. However, poor *Kiremt* rainfall in eastern and central Oromia and SNNPR, low livestock holdings in pastoral southern Afar and Shinile, and expected poor performance of October to December rainfall in southern pastoral areas are likely to lead to above-average food assistance needs in 2016/17.
- Below-average *Kiremt* rainfall and dry spells in the lowlands of central and eastern Oromia and the Rift Valley in SNNPR is likely to lead to below-average *Meher* harvests. The expected below-average production, coupled with low income from agricultural labor, is likely to drive poor households into Crisis (IPC Phase 3) between February to May 2017 in these areas.
- In southern pastoral areas, below-average October to December rainfall is likely to lead to a substantial deterioration of pasture and water resources. Long-distance migration of livestock and below-average food and income from livestock products will limit households' food access. Parts of southern SNNPR and Somali Region will be in Crisis (IPC Phase 3) during the pastoral lean season in February and March 2017.
- Overall *Meher* production is expected to be near to slightly below average. Performance of *Kiremt* seasonal rainfall was near or above-average in many areas, although waterlogging reduced yields in some localized areas. Expected near-average harvests will support normal food access in many western and northwestern areas of the country, which will be face Minimal (IPC Phase 1) acute food insecurity between October 2016 and May 2017.

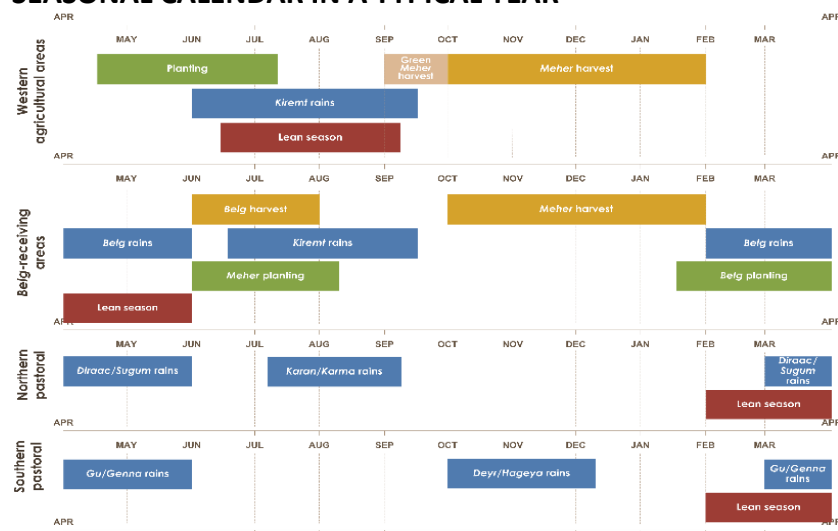
Current food security outcomes, October 2016



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 CALENDAR IN A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

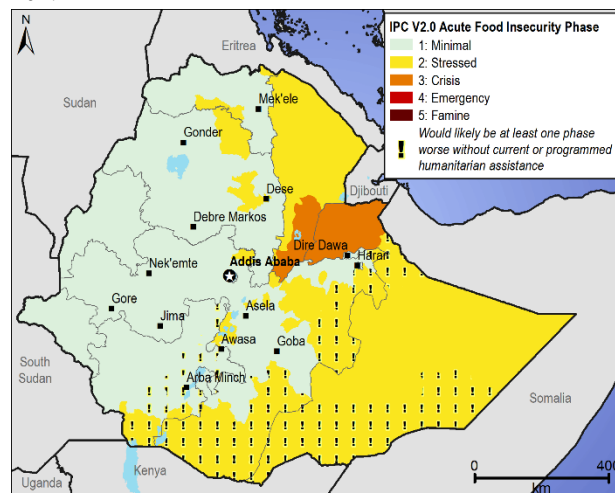
Kiremt (June – September) 2016 rains started on time in most areas of the country, except in Humara and Metema areas of Western Amhara and Tigray, where the onset of seasonal rainfall was slightly earlier than normal. In addition, the onset of seasonal rainfall was delayed in the lowlands of eastern and central Oromia and along the Rift Valley in SNNPR. In most *Kiremt*-benefiting areas, seasonal rainfall totals were near average and rainfall was generally well distributed over time. However, in the lowlands of eastern and central Oromia and in SNNPR along the Rift Valley, seasonal performance was further compromised by the erratic distribution of rainfall and seasonal totals that were 25 to 50 percent below average. Rainfall deficits were particularly significant in these areas between July 1-20 and August 21-September 10, 2016. In addition, rainfall in the lowlands of Waghimra and in nearby woredas was highly erratic and marked by several dry spells. Meanwhile, *Kiremt* rains in some highlands of Amhara, Tigray, and Oromia were very heavy and resulted in waterlogging, floods, and hail damage. Toward the end of September, the amount and coverage of rainfall improved in most places.

Kiremt rainfall in most *Kiremt*-receiving areas was generally favorable for seasonal agricultural activities. Land preparation and planting of most *Meher* crops was on time and no significant issues with the supply of agricultural inputs were reported. Currently, most *Meher* crops are in their normal stage of development. However, in the lowlands of eastern and central Oromia and in parts of SNNPR along the Rift Valley, the late onset and below-average amounts of rainfall led to significant moisture stress and stunting of crops, particularly maize and haricot beans. In addition, a lack of adequate moisture in the lowlands of Waghimra and neighbouring woredas resulted in below-average crop growth and reduced yields. In localized highland areas of northern and western Ethiopia, waterlogging from excessive rainfall in July also affected normal crop development.

In *Belg*-receiving areas of Amhara and the Oromia highlands, excessive rainfall negatively impacted *Meher* crop production, leading to below-average cropping prospects following a below-average 2016 *Belg* season. In SNNPR, delayed harvesting of *Belg* crops caused a significant delay in planting of *Meher* crops, which forced many agricultural households to use short-maturing, but low-yielding, seed varieties. This is expected to reduce *Meher* production to below average levels in some areas, especially for maize.

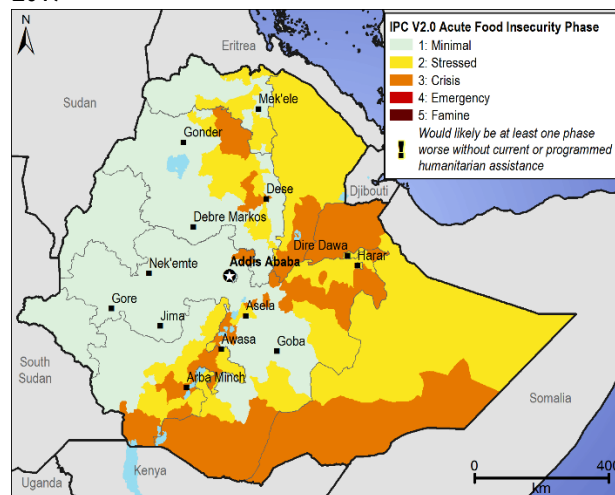
Following good March to May seasonal rains in most pastoral areas of Afar and northern Somali Regions, the average to above-average June to September 2016 was the second consecutive season to recharge water sources and regenerate pasture and browse. As a result, body conditions of livestock have significantly improved compared to the same time last year. Productivity and herd sizes of small ruminants, such as sheep and goats, have returned to normal. Body conditions for larger ruminants such as cattle, have improved to normal, but herd sizes have not yet recovered following significant livestock deaths last year. Livestock births and milk production per individual animal are also normal, but total births and milk production remain low compared to average for the area, since herd sizes are lower than normal. Livestock body conditions and productivity in the remaining parts of the country remain normal.

Projected food security outcomes, October 2016 to January 2017



Source: FEWS NET

Projected food security outcomes, February 2017 to May 2017

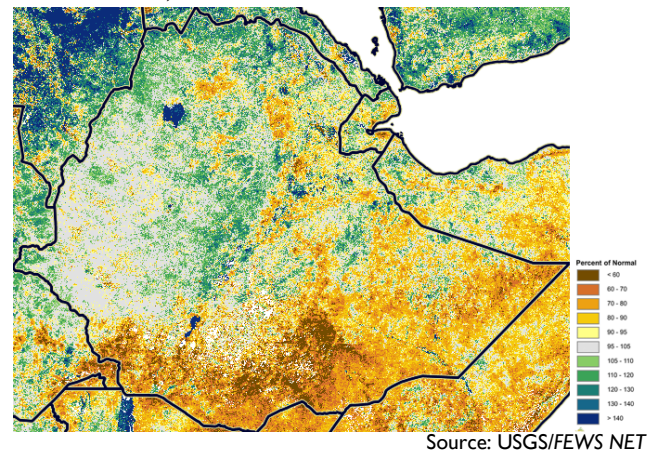


Source: FEWS NET

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](#).

In general, prices of livestock are generally stable or slightly higher than the recent five-year average, but significantly higher compared to last year (2015) due to improved body conditions and increased livestock demand on local markets. In Shinile market, for instance, goat prices in September 2016 were about 800 Birr/head, which is about 15 percent higher than the five-year average and double the September 2015 price. Prices of staples are generally stable, but above the recent five-year average in most rural markets of the country. The Central Statistical Agency (CSA) price data indicates that September 2016 maize prices in Addis Ababa were six percent higher than in August 2016, and 14 percent higher than the recent five-year average. Meanwhile, sorghum prices in Addis Ababa were 12 percent higher than in August 2016 and 27 percent higher than the recent five-year average. The delivery of large amounts of humanitarian assistance may be a factor contributing to a moderation of price increases.

Figure 1. eMODIS NDVI Anomaly, Percent of Normal, October 21-31, 2016.



Source: USGS/FEWS NET

However, in southern and southeastern pastoral areas of Ethiopia, rainfall performance during the start of the October to December 2016 season has been very poor. The onset of seasonal rainfall has been delayed by up to four weeks in many areas of southeastern SNNPR and southern and central Somali Region. Cumulative seasonal rainfall totals have been less than 25 percent in most areas. Satellite-derived vegetation indices (NDVI) suggest vegetation levels are significantly below average for late October (Figure 1), suggesting pasture and browse and likely at below-average levels, particularly as the late start of seasonal rainfall has effectively extended the dry season (typically June to September) by a month more than usual.

Nutrition outcomes have likely improved in most parts of the country due to improved food access from recent *Belg* harvests earlier in the year, the start of green consumption in October from the current *Meher* season, and ongoing humanitarian assistance. A total of 9.7 million beneficiaries are being assisted in the country based on the revised humanitarian assistance for the period July to December 2016. In July 2016, the total number of children admitted to the Therapeutic Feeding Program (TFP) declined by 18 percent compared to June 2016, was 32 percent lower than in July 2015, and was 23 percent below the recent five-year average for July.

In southern Afar and Sitti Zone of Somali Region, poor households' livestock holdings remain lower than normal as herd sizes have not fully recovered following significant losses due to drought in 2015. The food and income obtained from the available livestock is not currently meeting household food needs, and income from other sources (below-average income from charcoal production, for example) is contributing to lower than usual food access. Most poor households in these areas continue facing food consumption gaps and large livelihood protection deficits, and are currently in **Crisis (IPC Phase 3)**. Whereas in Northern Afar, with relatively better livestock holding with poor and very poor households and improved livestock production from two consecutive average seasons would likely to keep them marginally food secure but not able to meet their essential livelihood expenditure so that these areas remain at Stressed (IPC Phase 2).

In southern and southeastern pastoral areas including lowlands of East and West Hararghe Zones of Oromia Region, lowlands of Waghimra and *Belg* benefitting wordas of Amhara together with available food from *Meher* 2016 production and income access from their livestock particularly from small ruminant and the humanitarian assistance in this area will help them to cover their food consumption gaps marginally. Therefore, these areas are either in **Stressed (IPC Phase 2)** or **Stressed (IPC Phase 2!)**.

The new harvest from *Belg* season, green harvest of some *Meher* crops, available milk access from livestock and available humanitarian assistance particularly in Rift Valley areas of SNNPR, are at Minimal (IPC Phase 1!) with assistance whereas most of western Oromia, Amhara and Tigray and other western surplus-producing areas of the country are able to meet their food and non-food needs and are in **Minimal (IPC Phase 1)**.

Assumptions

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

- Mostly favorable Kiremt (June to September) seasonal progress in northern and western Ethiopia will result in near-average *Meher* harvests in most high-producing areas of the country. However, erratic and below-average *Kiremt* rainfall in the lowlands of eastern and central Oromia, areas along the Rift Valley of SNNPR, the lowlands of Waghimra zone in Amhara, and a few adjacent woredas in Tigray, and localized water logging in areas of northern and western Ethiopia, will likely reduce yields. This is likely to lead to near to slightly below-average *Meher* production at the national level.
- The generally good *Kiremt* rains helped the regeneration of pasture and browse, which will likely lead to the maintenance of normal livestock body conditions and productivity in northern, western, southwestern, and central areas of the country through May 2017.
- Although an official La Niña may not be declared between October and December 2016, global climate forecasts, forecasts for a slightly negative Indian Ocean Dipole through November, and NMME seasonal forecasts suggest La Niña-like impacts are likely to result in below-average rainfall during the October to December 2016 season in southern and southeastern pastoral areas.
- Beyond December 2016, ENSO neutral conditions are expected and La Niña-like conditions should no longer be a main driver of rainfall performance through the rest of the outlook period. Global climate forecasts, in combination with available seasonal forecasts, suggest *Sapie* rains in January 2017 and *Belg* and *Gu* seasonal rainfall totals between March and May 2017 will be average.
- In southern and southeastern pastoral areas, livestock body conditions and productivity are expected to decline due to the impact of long seasonal dry condition since May 2016. Livestock body conditions and productivity will likely be below average following expected below-average October-December 2016 rainfall. However, body conditions are likely to improve from April onwards with the anticipated normal *Gu* 2017.
- Prices of locally produced cereals, particularly maize and sorghum, tend to show some declines because of increased market supply from during and following the harvests that begin November/December. Maize and sorghum prices are expected to remain stable at above-average levels or may show slight declines between October and February, but will likely increase seasonally from March onward. For example, maize prices in Shashemene are likely to increase by about 17 percent between November/December 2016 and May 2017, and will be about 11 percent above the recent five-year average for May. Similarly, in Mekele market, sorghum prices are likely to increase by 12 percent between December 2016 and May 2017, and will be about 18 percent above the recent five-year average. Similarly, livestock prices expected to be stable in most parts of the country, except in southern and southeastern pastoral areas, where they will likely be below average.
- Seasonal agricultural labor opportunities and income between October 2016 and May 2017 are likely to be normal in both *Meher* and *Belg* growing areas of northern, northwestern, and western Ethiopia. In SNNPR, eastern and central Oromia, and localized areas of Amhara, *Meher* harvest labor opportunities between October and December 2016 are likely to be below average, followed by near-normal agricultural labor opportunities between February and May 2017 for the *Belg* season.
- PSNP resource transfers will normally occur between January and June 2017.
- Humanitarian assistance is planned, funded, and likely through December 2017. According to the revised HRD, 567,000 MT of emergency food assistance is required between October to December 2016 for 9.7 million people. More than 46 percent of this assistance will be provided by WFP and JEOP, while the remaining 54 percent will be covered by NDRMC on a month by month basis. Humanitarian assistance from January through May 2017 will depend on the findings of the multi-agency assessment scheduled to be released in December 2016. As a result, humanitarian assistance is not yet planned for January to May 2017.

Most Likely Food Security Outcomes

In **southern Afar and northern Somali Region**, the loss of significant numbers of livestock due to drought in 2015 continues to constrain household food access as household livestock holdings have not yet returned to normal levels. Though herd sizes of small ruminants (sheep and goat) have shown some improvement due to two consecutively good rainy seasons, the overall

livestock asset owned by the poor and very poor households will not provide adequate access to food and income in order to be able to meet their minimum food and livelihoods protection needs, and households will continue to face food consumption gaps, although households will continue to consume humanitarian assistance that may limit the size of the gaps. Therefore, southern Afar and Sitti of Somali are likely to remain at Crisis (IPC Phase 3). The two consecutively average seasonal rains in northern Afar enhanced livestock production there by households' food and income access improved. Therefore, these areas are likely to be at Stressed (IPC Phase 2) from October 2016 to May 2017.

In the **lowlands of central and eastern Oromia**, the **Rift Valley of SNNPR**, the **lowlands of Waghimra Zone**, and **a few adjacent woredas in Tigray**, own production from *Meher* harvests is likely to lead to short-term improvements in food access. However, household food stocks are likely to be exhausted earlier than normal due to below-average production. Particularly in East and West Hararhge and lowland of central Oromia, poorer households have reduced coping capacity following three consecutively poor production seasons and asset holdings are low. As a result, these areas are likely to be in Stressed (IPC Phase 2) or Stressed (IPC Phase 2!) with assistance from October 2016 to January 2017. With the exhaustion of household stocks two months earlier than normal and seasonal increases in staple food prices, poor households are likely to be in Crisis (IPC Phase 3) from February to May 2017.

In **Belg-dependent areas of South and North Wollo Zones of Amhara Region**, households are likely to exhaust their stocks of own-produced foods one to two months earlier than normal, due to below-average Belg 2016 harvests. These areas are likely to be in Stressed (IPC Phase 2) from October 2016 to January 2017. As households increasingly rely on markets to access staple foods and staple food prices increase seasonally, households will move to Crisis (IPC Phase 3) from January to May 2017. With the expected near-average *Meher* harvest, access to food is highly likely to improve from October onwards in most other eastern marginal areas of Tigray, Amhara, and adjacent Zones of Oromia. Stable food prices and average income from agricultural labor will also contribute to maintaining food access by poor households. Therefore, these areas will be in Minimal (IPC Phase 1) through May 2017. However, those areas with localized waterlogging or moisture deficit problem will lead them to be marginally food insecure and likely to be in Stressed (IPC Phase 2) throughout the outlook period.

In pastoral areas of **southern Somali Region and southeastern SNNPR**, poor livestock body conditions and reductions in milk production and the market value of animals starting in October will limit household access to food and income. Between October 2016 and January 2017, most households will be able to meet their food needs but will likely be unable to afford some essential nonfood expenditures, and will be Stressed (IPC Phase 2) or Stressed (IPC Phase 2!) during this period. Between February and May 2017, livestock body conditions, prices, and productivity will reach their seasonal lows, exacerbated by the anticipated poor regeneration of pasture conditions following expected below-average October to December 2016 rains. This will result in below-average food access during the peak of the pastoral lean season in February-April, and poor households in parts of South Omo, Borena, and parts of Somali Region bordering Somalia and Kenya will likely face food consumption gaps. Therefore, these areas are likely to move to Crisis (IPC Phase 3), particularly during the peak of the pastoral lean season in February/March 2017.

The carryovers stock from the previous harvest, the expected near-average production from the current season and income from different sources in the western half of the country including western SNNPR, Oromia, Central and Western Amhara, Tigray and most parts of Gambella and Benishangul Gumuz Regions is likely to maintain adequate access to food and income of most households. Therefore, these areas are likely to be in Minimal (IPC Phase 1) between October 2016 and May 2017.

AREAS OF CONCERN

1. Southern Afar and Sitti Zone in Somali Region

Current Situation

In general, *Karma/Kerren* seasonal rainfall generally started on time and ended on time, although rains were somewhat erratically distributed over time and space. Cumulative June to September 2016 *Karma/Kerren* rainfall was near to above average parts of Afar and Sitti Zone, except in some extreme lowland areas of Sitti zone. This was the second consecutive season with rainfall that was either average or above average. As a result, pasture and browse have improved over most areas. According to interviews with key informants conducted in August 2016 during the FEWS NET/WFP joint mid- *Karma* assessment in southern Afar, the available pasture, browse, and water found in rangelands can sustain livestock feed demand

for the upcoming three to four months. Following improved livestock feed access, livestock body conditions and productivity continued over most parts.

Though pastoral conditions are favorable, low household livestock holdings following the drought in 2015 is limiting households' ability to obtain their normal levels of food and income from livestock. Household herd sizes remain below average due to low births during the previous seasons and high household livestock takeoff onto the market, coupled with massive livestock deaths in 2015. Consequently livestock products, especially milk availability from cattle and camels, remain low except for limited amounts of milk from small ruminants. Livestock movements or migration is normal and there are no livestock disease outbreaks.

As is usual, supply of staple cereals on major markets continues to decline in the period immediately prior to harvests in the adjacent crop-producing areas of Oromia and Amhara. Compared to the same period last year, current cereal prices have shown significant increases in Southern Afar and Sitti Zone of Somali region. For instance, the September 2016 price of maize in Shinle is 27 percent higher than in September 2015. However, market supply of livestock, particularly small ruminants and cattle, is high due to high household needs for cash coupled with observed high livestock demand made during Ethiopian New Year and holidays. Nevertheless, livestock price are have increased. For example, September 2016 prices of an average size goat in Shinile are 20 percent higher than in September 2015, and in Awash Fentale are up to 120 percent higher than in September 2015. This has resulted in terms of trade that are generally favorable for pastoral and agropastoral households.

The timely onset of 2016 *Karma/Kerren* rainfall created favorable conditions for seasonal agricultural activities in agropastoral, riverine, and sedentary farming areas. However, the late onset of 2016 March to May *Dirra/Gu* rain seasons induced significant delays in planting long cycle crops, like wheat, sorghum, and maize in Sitti zones of Somali Region. Planted long-cycle crops are currently found at flowering, head setting, and early vegetative stages. Extended dry spells reported in August 2016 caused moisture stress on planted crops and affected crop development.

In Afar Region, TFP admissions in July 2016 declined by 17 percent compared to the previous month, by 53 percent compared to February 2016 when admissions reached peak levels, and 12 percent compared to July 2015. Meanwhile, in Sitti Zone, TFP admissions in July 2016 remained stable compared to June 2016, and were 17 percent lower than in February 2016. However, the observed aggregated nutritional improvements at zonal level sometime oversee the actual nutritional situation of some districts. For instance, in Gewane Woreda of Gabi zone of Afar region the OTP admission trend remain between January and May 2016 at elevated level than other districts found with the administrative zone. On the other hand, TFP admission made in Gewane in May 2016 reduced by 28% as compared to previous month, similarly such reduction OTP never observed on other woredas found as compared to previous month for similar period. Nonetheless, rapid nutritional assessments conducted in August 2016 in Elidar and Gewane woredas of Afar Region suggest GAM levels remain concerning. Broadly speaking, improvements in nutrition outcomes may be the result of ongoing humanitarian assistance and improved access to food and income from livestock.

The overall food security situation continued to improve following two consecutively favorable rainy seasons in 2016. Availability of feed for livestock has improved, improving livestock body conditions and milk access from small ruminants. However, milk access from cattle and camel remain low due to low livestock birth in the previous season. However, household's income access that normally obtained from livestock sale observed improving following improved livestock market conditions. Though, the current situations found in Southern Afar and Sitti zone of Somali region are more favorable to pastoralist, their reduced livestock holding due to impact of previous three consecutive drought seasons, constrain pastoral and agro pastoral households from getting their normal food and income access from their livestock. Poor and very poor households left with low livestock holding unable to afford the required number of livestock for food purchase and remain facing with significant food consumption gaps. Humanitarian food assistance together with some cash from sale of livestock that enhance purchasing are the main food sources for poor and very poor households are accessing. Therefore, most parts of Southern Afar and Sitti Zone of Somali Region remained in Crisis (IPC Phase 3) in October 2016.

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:

- Livestock migration is expected to be normal between October 2016 and May 2017, due anticipated normal performance of upcoming seasons

- Water availability for both, human and livestock consumption, likely to remain seasonally low between October to December 2016 and following anticipated near to above normal “Deda” rain season in January 2017 and likely anticipated near normal March to May 2017 Sugum / Dirra rain season water availability expected to recover to normal level
- Livestock body conditions and livestock product especially milk production from small ruminates is likely to be improved following anticipated near to above normal “Dirra” rain season in January 2017 and with likely anticipated near normal March to May 2017 Sugum / Dirra rain seasons combined with improved shoat birth.
- Herd sizes and livestock birth especially from cattle and camel expected to remain low between October 2016 and February 2017 due to impact of previous drought seasons. However, following likely anticipated near normal March to May 2017 Sugum / Dirra rain seasons camel and cattle birth expected to improve.
- Consequently livestock product especially milk availability from camel and cattle are expected to remain low between October 2016 and January 2017 and expected to improve following anticipated camel and cattle birth during likely anticipated normal March to May 2017 Sugum / Dirra rain seasons
- Staple food (sorghum and maize) prices expected to exhibit stable or slightly increase trend between October 2016 and May 2017 with anticipated near average supply from the western surplus producing areas. On the other hand, improved body conditions expected to improve livestock market price situation between throughout the outlook period and consequently ToT is expected to be improved.
- Emergency humanitarian assistance for beneficiary of 102,141 in Gabi Zone of Afar and 235,230 in Sitti is most likely to continue between October to December 2016, areas that addressed through FDRMC based on case by case approaches. In addition, PSNP resources for 54,140, and 274,074 people in Gabi Zone of Afar and Sitti of Somali respectively is likely to continue between January to May 2017.

Most Likely Food Security Outcomes

Observed improvements made on pasture, browse and water availability expected to further flourish following likely anticipated near to above average ‘Deda’ rain season in January 2017 coupled with near normal March to May 2017 Sugum / Dirra rain seasons. Consequently, livestock body conditions, livestock birth, livestock products and productivity is expected to improve further through January 2017 to May 2017. Through, the overall current situations found in southern Afar and Sitti zone of Somali region in favor of pastoralist, due to their low herd size local pastoralist will severely deprived their normal food and income access that normally obtained from livestock sector. Following anticipated improved camel and cattle birth during March to May 2017, household milk availability and access from cattle and camel expected to improve. As result, nutritional situation of pastoral and Agro pastoral children expected to slightly improved further between March and May 2017.

The anticipated improvements in livestock market situation will further improve household income access from purchase. However, poor and very poor households left with low livestock holding unable to afford sale minimum number livestock to earn cash to cover their basic food and none food needs through purchases. Therefore, poor and very poor households found in Southern Afar and Sitti zone of Somali region relay on markets expected to face significant food consumption gaps. On the other hand, agro pastoral households expected to have improved food access from their own crop production following anticipated below average 2016 *Meher*/Gu/Karma harvest. Other income sources from agricultural labor and self-employment (fire wood and Charcoal sale) will remain much below normal. Social support and humanitarian assistance are the only reliable food and income sources for poor and very poor households found in Southern Afar and Sitti zone of Somali region therefore will remain in crisis (IPC Phase 3) from October 2016 to May 2017.

2. SNNPR: Lowlands of Gedio, Sidama, Wolayita, Gamogofa and Segen Zones

Current Situation

Following the late start and erratic distribution of February to May 2016 *Belg* rainfall, the onset of June to September 2016 *Kiremt* rainfall was late by about one to two weeks, and rainfall totals were well below average in most lowland areas, particularly in Segen, Gamogofa, Wolayita, Sidama, and Gedio. Although rainfall amounts and distribution improved during mid to late September, it was not adequate to substantially improve seasonal performance.

The erratic nature of both *Belg* and *Kiremt* rains had their negative impacts on *Meher* crop cultivation. Land preparation and planting of long-maturing crops was generally good due to good rains in April. However, dryness in May and June, followed by dry spells in July and August, significantly affected these crops. *Meher* crops typically planted in June were also affected by dryness at the start of *Kiremt* rains in June and July, which pushed the planting window back. Although total area planted eventually reached near average levels, many households were forced to plant shorter-maturing varieties that produce lower yields. Moreover, some of the wheat, barley, and haricot beans had already wilting due to moisture stress in July, August, and early September. Some late-planted crops recovered to some extent with rains toward the end of September, but most other crops remain stunted. Root crops like Irish and sweet potato are also affected. In localized areas, flooding and landslides due to heavy fall towards end of April, and early May caused significant damage to long-maturing and high-yielding *Meher* crops like maize, sorghum, and finger millet, also requiring replanting using shorter-maturing and lower-yield crops.

Currently, most *Meher* crops are in the grain filling stages, but harvesting and threshing has been completed in Segen Zone, where total production is estimated to be about half of average production. In addition to below-average soil moisture, crop pests such as potato blight, root rotting on root crops and Maize Lethal Necrosis Disease (MLND) infestation on maize crops have further reduced yields. Therefore, total *Meher* crop production in these areas are likely to be well below average. For example, the community discussion in Sidama Maize Belt Livelihood Zone indicates that maize production is in the range of 45 to 55 percent of the average production in most maize-growing areas of the Zone.

Coffee production was also affected by moisture stress in February and March during its first round of flowering, in May and June at its second round of flowering, and in early August when the coffee was at its grain filling stage. The poor coffee crop condition has affected the level of labor demand and the price of coffee labour for the local and migrant labours in the coffee producing areas of the region. As an example, in Dilla Zuria, the wage for a day of labor in September 2016 (25 Birr per person per day) declined by about 29 percent compared to the prices in July and August 2016 (35 Birr per person per day).

Despite erratic and below-average rainfall in these areas, the available moisture did help to regenerate water sources and pasture and browse for livestock. Availability of crop residue is also currently providing additional feed for livestock. However, animal feed reserves are below average and are likely to run out earlier than usual. Current body conditions of livestock, particularly small ruminants, are about their average conditions. However, the birth rates of cows remain below average due to the negative impact of last year drought during their conception. Therefore, milk yield per cow has improved but the total milk production remains below average, which affects milk consumption by poor households who have cattle or care for cattle for medium and better-off households. No disease outbreak reported except increased Anthrax and Blackleg caseloads and FMD in the lowland areas.

Prices for maize, the main staple food, have been increasing atypically in most local market of SNNPR, due to below-average maize production along the Rift Valley of SNNPR due to unfavorable *Belg* and *Kiremt* rainfall. In Hosanna market, maize prices increased by six percent from August to September 2016, and are 40 percent higher than in September 2015 and 15 percent higher than the recent five-year average.

Although below average, *Belg* harvests earlier in the year and the consumption of green *Meher* harvests, together with continued food aid assistance in most lowland areas, is helping most households to meet their food needs. Daily wage labor is also helping poor households to generate some income to supplement their current food needs through market purchase. In July 2016, the month for which the most recent data is available, the number of children admitted to the Therapeutic Feeding Program (TFP) in SNNPR was about 10 percent lower than in the previous month, and was 38 percent lower than in July 2015. These areas remain in Minimal (IPC Phase 1!) acute food insecurity, with ongoing humanitarian assistance over 4200MT of food per month for more than 250,000 people.

Assumptions

In addition to the national-level assumptions above, the projected food security outcomes for Gedio, Sidama, Wolayita Gamogofa and Segen Zones of SNNP Region are based on the following assumptions:

- *Meher* 2016 total seasonal production in most lowland areas (particularly along the Rift Valley) is likely to be below average due to poor seasonal performance, particularly in July and August. Below-average rainfall expected between October and December will also reduce planting and development of sweet potatoes, and lead to below-average sweet potato harvests in March 2017.

- Agricultural labor opportunities, particularly for coffee labor, is likely to be below average between October and December 2016 due to the anticipated below-average production. This will decline labor wage rate and total income from labor. However, from February to May 2017, period labor opportunities are likely to be normal with anticipated average rainfall, but the higher than usual number of people in search of labor might cause the wage rate to remain low.
- Despite below average production is expected through December 2016, the available food from own production will fulfill the household food requirement for short period. However, own production will exhaust sooner than usual so that lean season might start earlier than usual. Normally the main lean season in SNNPR is April –June but during the year when production is below average (like this year) lean season expected to start in January/February.
- Forecast average Belg rainfall between February and May 2017 is likely to lead to normal levels of agricultural activities through May. Though the dry condition through December 2016 will aggravate depletion pasture and water in the lowland areas, the expected normal Belg rains will replenish these sources so that livestock body condition and production will remain average throughout the scenario period
- The anticipated below average production in the area is likely to suppress the grain supply to the local markets particular in October to December period so that staple food prices will remain high; that mean no seasonal reduction expected. However, the price of staple food from January onwards will show significant increase by about 15 percent in May compared to five-year average.
- The humanitarian assistance operational by Joint Emergency Operation Program (JEOP) consortium is earmarked through December 2016 to provide full rations in about 7 woredas of the total 46 woredas that are parts of the areas of concern in SNNPR. For the remaining woredas, the government is likely to deliver the food aid based on the case-by-case assessment. The expected continuation of humanitarian assistance together with current seasonal production will improve the household food availability.

Most Likely Food Security Outcomes

Despite with below average total production, harvests of *Meher* crops beginning in October 2016 and continued humanitarian assistance should improve households food access. The anticipated seasonal improve in income from coffee labor starting October and stable food price will also help poor household to increase their food purchase, though it is below average. The seasonal availability of coffee labour is between October and December, however, this year below average coffee production will lead to below average labour opportunity and low wage rate that will make the overall labour income would be below average. These areas are likely to be at Minimal (IPC Phase 1!) through January 2017. However, household food stocks will be exhausted earlier than usual and most households' food access from February through May 2017 is likely to rely mainly on purchases and PSNP resource transfers. The expected decline in income from labor and with anticipated staple food price increases starting in February will constrain the ability of poorer households to purchase adequate food. Because of this, most poor and very poor households are likely to face food consumption gaps from February to May 2017. Therefore, most lowlands of Gedio, Sidama, Wolayita, Gamogofa, and Segen Zones are likely to be in Crisis (IPC Phase 3) from February through May 2017.

3. Lowlands of Eastern and Central Oromia: East and West Hararghe, Arsi, West Arsi, East Shewa Zones

Current Situation

The onset of *Kiremt* (June to September) 2016 rainfall was generally on time, but rainfall totals were well below average and the season was marked by prolonged dry spells of 20 to 25 days. The worst-affected woredas are located in the zones of West Hararghe (Mieso, Doba, Guba Koricha, Habro), East Hararghe (Golo Oda, Meyu, Kumbi, Midega Tola, Fedis, Babile, Gursum, Chinaksen, Goro Gutu), East Shewa (Adami Tulu), and West Arsi (Shala Arsi Negele). In addition, heavy rains over several days in June 2016 caused flash floods that damaged assets and property. For example, in Gololcha woreda in Arsi Zone, floods damaged crops over 6000 ha of farmland and temporarily displaced over 12,460 people.

The major staple crops planted in lowlands of eastern and central Oromia are maize and sorghum. Following the near-normal start of *Kiremt* rains and taking advantage of improved moisture late in the *Belg* season, area planted in *Meher* crops was near average. Most crops in other lowland areas of central Oromia are at the grain filling and maturity stage, while maize is

currently being harvested. However, in the areas affected by severe dryness and dry spells, planted crops suffered critical moisture stress that result in wilting in eastern areas and obstructed the fruit setting and grain filling process. In the lowlands of central Oromia, estimates from the joint FEWS NET/WFP field visit in eastern Oromia suggest substantial yield reductions of over 75 percent in some worst-affected woredas. On top of dryness, a widespread maize disease known as MLND (Maize Lethal Necrosis Disease) has affected the grain-filling process in lowland woredas of Central Oromia.

Improved rains late in the *Belg* and early *Kiremt* 2016 contributed significantly to the regeneration of pasture in most of eastern and central Oromia, including the lowlands. Crop residue, mainly from maize stalks, has further increased livestock feed availability. No major disease outbreaks are reported in most of central Oromia. However, dryness since August and increased land surface temperatures depleted pasture and caused feed shortages, particularly in the eastern Oromia lowlands. As a result, livestock in the eastern Oromia lowlands of some woredas started migrating to nearby woredas and river valleys. Likewise, drier than normal conditions between August and September in most lowland areas has led to a deterioration of water resources for livestock consumption. Livestock body conditions are currently normal, and similarly productivity and market value of livestock have improved since April 2016 such that both are generally considered to be at near-normal levels.

As harvests have not yet taken place, supply from local production is not yet improved and market supplies are still from western surplus. As emergency food assistance is covering a significant part of household food needs, and purchasing power remains low, market demand for staple foods is lower than normal. Subsequently, prices of main staple (maize) cereal has remained stable or showed slight increases in September 2016 compared to preceding months. In Chiro market in West Hararghe zone prices have oscillated between 600 and 650 birr per 100kg in the last three months. However, current staple prices are higher compared to last year. Although mainly consumed by urban dwellers, teff prices are significantly higher increase from last year. In August 2016, prices for teff in Shashemene (2000 birr per 100 kg) were 48 percent higher than in August 2015. On the other hand, livestock prices are in recent period following improved livestock body condition. In Chiro market, goat prices in September 2016 are higher by 35 and 18 percent compared to February 2016 and September 2015, respectively. Goat to 100kg maize terms of trade (TOT) in Chiro markets increased from 0.6 in March to 1.0 in September 2016. TOT (goat/100kg maize) in Dire Dawa increased from 0.68 in January 2016 to 1.25 and 1.05 in August and Sept 2016, respectively.

In East Hararghe zone, malnutrition screening data continues to indicate concerning numbers of children identified with moderate acute malnutrition (MAM). In June 2016, the most recent screening data available, MAM was identified in approximately 14 percent of children screened in Meyu Woreda. Nevertheless, these levels are lower than in August 2015, when MAM was identified in up approximately 19 percent of children screened.

Provision of humanitarian assistance is ongoing in October 2016, with five rounds of emergency food assistance distributed in the lowlands of eastern Oromia in 2016. Delivery of the sixth round is currently underway. The emergency food basket (general ration) contains 15 kg cereals, 0.45 kg vegetable oil, and 1.5 kg pulses per person per month. The general ration supplies 2,050 kilocalories/person/day, while the supplementary ration supplies an additional 570 kcal. The planned supplementary ration for “blanket” distributions to vulnerable groups, approximately 35 percent of the total affected population in need, consists of 4.5 kg of blended food.

Poor households in eastern Oromia are not yet able able to access food from *Meher* 2016 harvests, but these harvests are ready for consumption in the lowlands of central Oromia. Poor households in eastern Oromia continue to rely on market purchases and the ongoing provision of emergency food assistance, as improved cash income from the sale of livestock has not been able to fully eliminate food deficits. As a result, poor households in these areas are currently in Stressed (IPC Phase 2!). By contrast, poor households in central Oromia are already starting to consume their harvests and cash obtained from the sale of livestock are reinforcing household food access, resulting in Minimal (IPC Phase 1) acute food security outcomes.

Assumptions

In addition to the national assumptions, the projected food security outcomes for the lowlands of Eastern and Central Oromia are based on the following assumptions:

- *Meher* 2016 harvests between October and December 2016 are likely to be below average in the lowlands of eastern Oromia and in the lowlands along the Rift Valley in Arsi, West Arsi and East Shewa zones. Normally poor households in

eastern and central Oromia consume their own production for about 4-5 and 7-8 months, respectively. However, this year own harvests is anticipated to last in 2-3 months in eastern Oromia and 4-5 months in central Oromia.

- Household income from agricultural labor during the harvest is expected to be below normal in the lowlands of eastern Oromia and in the lowlands along Rift Valley in Arsi, West Arsi, and East Shewa zones due to below-average labor demand due to expected below-average harvests. However, access to income from agricultural labor is expected to improve between February and May 2017 in parts of Eastern Oromia as expected near-average rains support normal seasonal agricultural activities.
- Expected near-average *Meher* 2016 harvests in western surplus areas are likely to result in seasonal trends for staple cereals through April/May 2017. Livestock prices are also expected to follow normal seasonal trends, will likely be higher than last year thanks to improved livestock body conditions, and will likely reach their peak during the holidays in January and April 2017.
- Of the 38 total affected woredas, approximately one quarter will be covered by emergency assistance between October and December 2016 through resources already earmarked by the JEOP. Humanitarian assistance from the NDRMC will be delivered to the remaining woredas based on a month-by-month verification process.

Most Likely Food Security Outcomes

In the lowlands of eastern and central Oromia, the early exhaustion of own-produced food stocks several months earlier than normal will require poor households to access staple foods from markets longer than normal. Although improved livestock body conditions and productivity have improved household income from the sale of livestock and related product, income from this source is not sufficient to fully supplement household needs in terms of income and food access. Many households will continue to rely to some extent on humanitarian assistance in order to meet their basic food needs. Many households, particularly those in the lowlands of eastern Oromia, will be in Stressed (IPC Phase 2!) between October 2016 and January 2017. In other areas of eastern Oromia where the impact of dryness was more mild, poorer households are able to cover their basic food needs but livelihood deficits and will likely be in Stressed (IPC Phase 2) between October 2016 and January 2017. In central Oromia, poor households will have access to own-produced foods for more than four months, which, when complemented with income from the sale of livestock, will likely lead to Minimal (IPC Phase 1) acute food insecurity between October 2016 and January 2017.

As the dry season leads to the seasonal depletion of fodder and water for livestock, household access to income from sale of livestock and related products will continue to decline, particularly in January/February 2017. By this point, many poor households will have already exhausted their stocks of own-produced foods, will rely on staple purchases more than usual, and will no longer have access to agricultural harvest labor. As a result, households will likely migrate to nearby towns in search of casual labour and increase livestock sales than normal. As a result of longer-than-normal market dependence, lower income from livestock sales, and several consecutive years of coping in response to drought, poor households in eastern Oromia are likely to face Crisis (IPC Phase 3) outcomes between February and May 2017, while food security for poor households in the lowlands of central Oromia will deteriorate to Stressed (IPC Phase 2).

4. Southern and Southeastern Pastoral and Agropastoral

Current Situation

March to May *Gu* 2016 cumulative rainfall was generally near normal in most southeastern pastoral areas. However, it was below average in localized areas of Cherati, Dollo Bay, parts of Bare, and southwestern parts of Hargele woreda in Afdeer zone, Dollo ado of Liban zone, Mustrahi, Kelafo, and Ferfer of Shabeele zone, Dobawayn and Shilabo of Korahe zone, Bokh and Galaadi of Doolo zone and Gashamo of Jarar zone, Borana lowland pastoral of Oromia and Omo lowland pastoral of SNNPR.

Since the start of the dry season in May 2016, the availability of pasture and water sources have declined as is seasonally normal. However, the onset of *Deyr* 2016 rainfall has been delayed by several weeks with little to no rainfall received in most areas since the beginning of October. As a result, pasture and water resources have continued to deteriorate and are well below normal levels. In the riverine areas, particularly flood-recession areas, no cereals were planted this season due to the absence of overflow of rivers in August and September 2016. Similarly, due to the below-normal *Gu* 2016 in these areas,

rainfed sorghum crops also performed very poorly in agropastoral areas. Usually livestock migration is during the June-September and January-February, but some has been reported in October this year.

Seasonal declines in the availability of pasture and water have resulted in long distance migration of livestock both within and outside of these areas. Abnormal livestock migration from these areas, to the adjacent zones and regions, started in the last month of the wet season (June), for all livestock species, along with their kids, calves and lambs together, and have not yet returned to their normal grazing areas. The distance of the migration is atypical, with the timing atypically early, and normally migration is limited only to certain livestock species. Livestock births for the season remain normal, but the number of livestock conceived in this season has declined compared to normal. Livestock body conditions and productivity also remain below normal.

As a result of lower livestock productivity and long-distance migration of livestock, milk access has declined significantly for household members who have remained at home. In order to compensate, households in these areas are trying to cope by increasing the sale of livestock, especially shoats, which reduces herd sizes for these households. Price data suggest varying trends in terms of trade between livestock and staple cereals. For example, terms of trade between goats and maize in Bare of Afdeer Zone have decreased by approximately 12 percent between September 2015 and September 2016. On the other hand, terms of trade in Dolo Bay in Afdeer Zone are near prior year levels, and terms of trade in Dolo Odo have increased by more than 20 percent since last year.

Patterns in TFP admissions were mixed between June and July 2016. In Afdeer, for example, TFP admissions increased by only 1 percent, while in Doollo and Korahe, TFP admissions increased by 79 percent and 67 percent. The seasonal decline in milk production since June 2016, increases in staple food prices, and low income access have been factors limiting household food access. Most households are able to fulfill their minimum food needs, but only through increased sale of livestock and/or consuming humanitarian assistance. Therefore, most southern and southeastern pastoral areas are currently in Stressed (IPC Phase 2) or Stressed (IPC Phase 2!) with humanitarian assistance.

Assumptions

In addition to the national assumptions, the projected food security outcomes in Southern and Southeastern Pastoral and Agropastoral areas are based on the following assumptions:

- Due to the below-average *Gu* 2016 and expected below-normal rains in Deyr 2016, livestock body conditions and productivity are likely to continue deteriorating, due to declining pasture, browse, and water availability, with long-distance livestock migration expected between October 2016 and March 2017.
- As livestock body conditions and productivity continues to deteriorate, households are likely to increase the sale of livestock beyond normal levels, which could result in below-average herd sizes and result in lower than normal livestock prices.
- Much below normal calving, lambing, kidding and milk production are expected throughout the scenario period due to the below normal conceived livestock in *Gu* 2016, for all species, expecting below normal births in October 2016 for shoat and in April/May 2017 for camel and cattle. Livestock abortions are expected between October 2016 and May 2017 in order to limit the stress of livestock on pasture and water resources.
- Below-average crop production in the adjacent areas of Oromia and SNNPR will cause declines in grain supply to the markets so that sorghum and maize prices will show atypical increases through May 2017. Livestock prices are likely to fall during the entire outlook period as their body condition is expected to decline from the impact of a combination of poor seasonal rains and dry seasons. Livestock mortality is also expected to be above average during this period.
- Humanitarian assistance covers most woredas in Somali Region, except for five woredas in Afdeer, Fafan, and Liben Zones where H&S is implementing. Humanitarian assistance is funded and likely to be delivered by WFP in most of the Woredas of Somali Region through December 2016.

Most Likely Food Security Outcomes

Poor pastoralists in these areas will not be able to meet their minimum food needs through normal income sources without selling more livestock than usual, which will reduce pastoralists' herd sizes in the long run, but will help households access

meet their minimum food needs in the short-term through increased income. Therefore, poor households in these areas will be in **Stressed (IPC Phase 2!)** From October 2016 to January 2017.

Between February and May 2017, households are expected to continue selling more livestock than normal as livestock body conditions and productivity will continue to deteriorate. Particularly during February and March prior to the onset of *Gu* rainfall, livestock productivity and body conditions will remain especially low, and livestock births will remain low until after the livestock body conditions improve as the rains *Gu* 2017 rains begin to end in May. Poor households will only be able to marginally meet their minimum food needs through accelerated depletion of livelihood assets that will lead to food consumption gaps. Therefore, these areas will be in **Crisis (IPC Phase 3)**, particularly during the peak of the pastoral lean season in February/March 2017, whereas the remaining parts of the region remain in **Stressed (IPC Phase 2)**.

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
Southern and Southeastern Pastoral areas	Normal to above-normal October to December rains	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).
<i>Belg</i> crop-producing areas;	Below-average February to May 2017 rainfall	Below-average <i>Belg</i> harvests that would provide food access in the short-term, but may lead to an early exhaustion of stocks and increased needs to purchase food from markets later in the consumption year.
Southern and southeastern pastoral areas	Below-average <i>Gu</i> (March to May) 2017 rainfall	Poor performance of the <i>Gu</i> (March to May) 2017 rains could limit improvements in pasture regeneration, water resources, and livestock body conditions. This could limit household access to food and income and result a result in a further deterioration of food security.
Nationwide	Absence of humanitarian assistance from October to December 2016 and delay in PSNP resource transfer	Such irregularities would result in increased difficulties for households meeting their basic food needs.
Nationwide	Intensification of civil unrest in the country	Movement restricted, then producers, traders and laborers will be unable to access markets. Therefore, food prices will increase and incomes fall so as food consumption gaps widened

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](#).