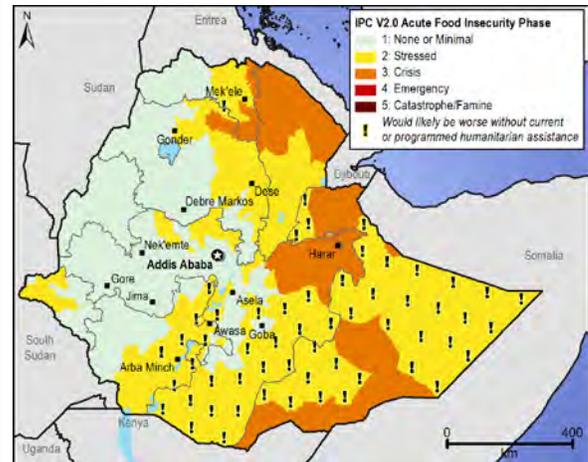


Some eastern areas face Crisis (IPC Phase 3) levels of food insecurity

KEY MESSAGES

- Below average crop and livestock production, high above average staple food prices, and declines in income will cause food security deterioration in East and West Hararghe Zones, Siti (formerly Shinile), some parts in Nogob (formerly Fik), Shebelle (formerly Gode), Afder, and Liben Zones of Somali Region, and the northeastern part of Afar between January and June.
- Despite the slight seasonal decline in food prices following the start of the October to January *Meher* harvest, staple food prices are still higher than last year and the five-year average. They are expected to increase further from April to June during the main lean season in *Belg*-producing areas. This will decrease household purchasing capacity, and households will be very market dependent at that time.
- Overall *Meher* grain production at national level is forecast to increase by five percent compared to last year, according to the Government of Ethiopia. The overall good production is mainly attributed to the normal to above normal June to September *Kiremt* rains, particularly in the western and central surplus-producing areas. However, poor crop performance was reported in many agricultural, eastern parts of the country, which largely remain food insecure.

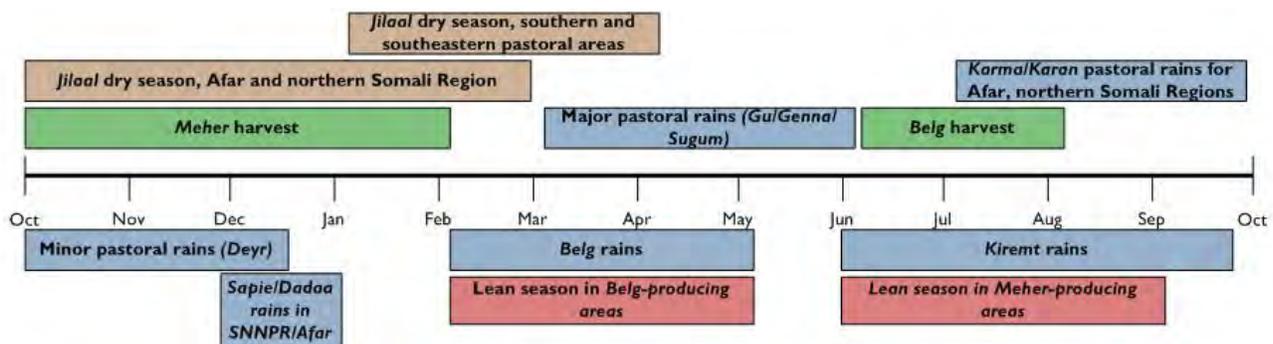
Figure 1. Current food security outcomes, January 2013



Source: FEWS NET Ethiopia

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect *chronic* food insecurity. Visit www.fews.net/foodinsecurityscale for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



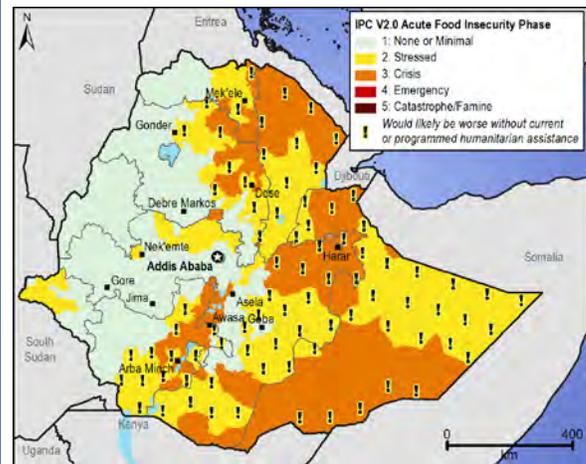
Source: FEWS NET Ethiopia

NATIONAL OVERVIEW

Current Situation

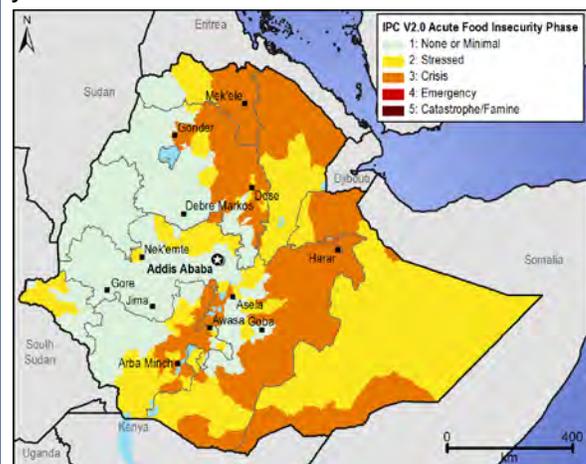
- The official crop production forecast estimates released by the Central Statistical Agency (CSA) estimated that a total of 229 million quintals (100 kilogram (kg) bags), 22.9 million metric tons (MMT), of grain will be harvested during the 2012 *Meher* season. This is a five percent increase from the 2011 to 2012 *Meher* harvest and around 19 percent above the five-year average. The increase in main season production is attributed to better agricultural performance in the central and western parts of the country supported by the normal and above normal June to September *Kiremt* rains and a very slight increase percent of between one and two percent in the area cultivated. The provision of humanitarian assistance during the main leasn season from June to September 2012 followed by the relatively good October to January *Meher* harvest in the central and western part of the country has kept food security stable across much of the country. However, below average agricultural production in some areas has caused a deterioration in the food security in most parts of eastern and southern Tigray, eastern Amhara, areas in Southern Nations, Nationalities, and Peoples' Region (SNNPR) along the Rift Valley, and eastern Oromia particularly in East and West Hararghe Zones, and the lowlands of Bale, Arsi, East Shewa, and some woredas in BorenaBorena Zones. Also, some parts of Gambella Region were flooded during the June to September *Kiremt* rains, eroding the cultivated land and decreasing production.
- Compared to recent years, the 2012 October to December *Deyr/Hageya* rains performed well. They improved pasture and water availability in most southern and southeastern pastoral and agropastoral areas. The improved pasture and water conditions improved livestock body conditions and productivity, particularly in the areas that had a better March to May 2012 *Gu/Genna* season. However, shortages of pasture and water still persist in a number of woredas in the southeastern parts of the country. These areas either received no rain or below average total rainfall during their October to December *Deyr/Hageya* rainy season. Despite improvements in pasture, browse, and water availability, in agropastoral and riverine areas, the crop performance was poor due to moisture stress.
- Similarly, some parts of Afar and northern Somali Region have shown an improvement in food security due to the normal and above normal July to September *Karma/Karan* rains. However, due to the poor distribution and below average amount of *Karan/Karma* rains in some areas, no significant food security improvements occurred in the chronically water deficit areas of these two regions. Neither livestock nor households were able to fully meet their needs due to continued poor rainfall performance. Poor and very poor households in some marginal, eastern areas of the country are currently trying to increase their income by selling small ruminants, increasing the number of household members involved in casual or migratory labor, and petty trading. However, the increase in the number of people involved in these income-generating activities decreases their profitability, and, as such, in many areas, there are insufficient opportunities to earn adequate cash to purchase food.
- Currently, the prices for staple foods are seasonally declining, particularly in the central and western surplus-producing areas. In December 2012, the consumer price index (CPI) shows general consumer inflation moving down to under 13

Figure 2. Projected food security outcomes, January to March 2013



Source: FEWS NET Ethiopia

Figure 3. Projected food security outcomes, April to June 2013



Source: FEWS NET Ethiopia

These maps represent *acute* food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect *chronic* food insecurity. Visit www.fews.net/foodinsecurityscale for more on this scale.

percent from percentnearly 16 percent in November. In December, Food price inflation declined to 12 percent from 13 percent in November. However, December food prices were still much higher than the five-year average and appear to be remaining at their elevated level even during the *Meher* harvest. Typically, after the *Meher* harvest, prices decline significantly. This year, they appear to have merely stabilized at their current high levels.

Assumptions

From January to Jun 2013, the projected food security outcomes are based on the following key assumptions:

- Based on the global and national climactic forecasts available, the February to April *Belg* and March to May *Gu/Genna/Sugum* rainy seasons are assumed to be near normal. However, some forecasts predict higher than average temperatures, especially in lowland areas during the January to March dry period.
- As supplies from the *Meher* harvest continue to enter markets through February, staple food prices will remain relatively stable near their current elevated levels in January and February. However, after February, *Belg*-dependent areas, pastoral areas, and areas with lean seasons from March to May will likely experience further rises in staple grain prices.
- Despite some important differences among different regions of the country, overall, livestock prices at the national level are assumed to be relatively stable from January to June as domestic, primarily urban demand and export demand is expected to remain strong.
- The Productive Safety Net Program (PSNP), the government's cash and food transfer programme for 6.89 million chronically food insecure people, is expected to take place as usual in the receiving areas from January to June 2013.
- The trend of a high number of refugee arrivals is expected to continue to stress available host community resources, especially water and pasture. By increasing demand on local markets, price increases are expected in the host communities in southern Somali, northern Tigray, Benshangul Gumuz, and Gambella Regions.

Most Likely Food Security Outcomes

In the western and central surplus-producing areas of the country, the above average *Meher* harvest is seasonally improving food consumption and income earning from harvest labor. These areas are expected to remain at Minimal (IPC Phase 1) acute food insecurity with exceptions in some parts in Gambella and other pocket areas. Floods in early September and below normal rains in Gambella and some parts of western and central parts of the country affected the *Meher* production. The poor and very poor households in these areas are only meeting their minimum consumption needs through coping and are classified at the Stressed (IPC Phase 2) level of food insecurity.

From January to March, poor households in the agricultural, eastern parts of the country will have minimally adequate food consumption supplied primarily from the October to January *Meher* harvest. In East and West Hararghe, production was worse. Well below average *Meher* production in eastern, marginal agricultural areas will not provide stocks to last very long, and poor households will start having difficulties addressing their minimal food needs in January without selling assets or employing other unusual coping strategies. Therefore, poor households in agricultural, eastern parts of the country will be Stressed (IPC Phase 2) from January to March, and their food insecurity level is expected to further deteriorate to Crisis (IPC Phase 3) from April to June as they enter the lean season. As an exception, the performance of June to September *Kiremt* rains was especially erratic and poorly distributed in East and West Hararghe and surrounding areas. Poor households in these areas will not be able to minimally address their food consumption gap without using coping strategy that deplete their assets. Poor households in East and West Hararghe and surrounding areas will face Crisis (IPC Phase 3) from January to at least June 2013.

Despite the relatively good July to September *Karan/Karma* and October to December *Deyr/Hageya* rains in the pastoral areas of the country, there will still be food insecurity in some of these areas due to asset depletion caused by the cumulative effects of repeated droughts. Accordingly, the rains improved food security as pasture, browse, and water availability improved and, then livestock body conditions, leading to higher sales prices during November to December. However, pasture and water availability is expected to deteriorate earlier than usual due to expected high temperatures. The assumed normal performance of the upcoming rainy seasons in the scenario period would further improve the situation. On the other hand, the pastoral areas that had a below average July to September *Karan/Karma* or October to

December *Deyr/Hageya* season will need to increase their livestock sales above usual, including small ruminants, despite the expected seasonal improvements in March to May 2013, in order to purchase food. Therefore, pastoralists in the eastern tip of Somali Region, Borena, Guji, and southern Afar that will remain at the Stressed (IPC Phase 2) level of food insecurity. Where pasture did not fully recover during the rains, poor households are expected to be at the Crisis (IPC Phase 3) level of food insecurity from January to March. The expected normal March to May *Gu/Sugum/Genna* rains will improve the situation, and some poor households will improve to Stressed (IPC Phase 2) from April to June. The exception will be those areas that have had two consecutive poor rainy seasons in 2012. They will remain in Crisis (IPC Phase 3) from April to June.

AREAS OF CONCERN

Southern and southeastern pastoral and agropastoral areas

Current Situation

In most parts of southern Somali Region, the October to December 2012 *Deyr* rains were near normal. This regenerated pasture and browse. Overall, pasture conditions in most parts of southern Somali Region are normal. However, drier conditions prevailed in Elwayn, parts of Danan, and East Imey Woredas in Shabelle (formerly Gode) Zone, West Imey, Raso, Dollo Bay, and Barey Woredas in Afder Zone, and Dollo Ado in Liben Zone. Deterioration of pasture conditions has already started in some of these areas, but the distribution of pasture has never been uniform in the Region. Accordingly, in the dry areas, some early migration both within woredas and between zones has been reported. Generally, migration during the dry season would take place in January or February, but it has started as early in November in some dry areas. The October to December *Hageya* rains in Borena was normal and contributed to improved availability of water and pasture.

Body conditions of livestock improved in most parts of southern Somali Region and in Borena and Guji Zones in Oromia due to the enhanced access to water and grazing resources. A significant number of livestock have been born since the onset of *Deyr* rain in November with cattle and camels being the primary calving livestock. With the increasing number of lactating cattle and camels, milk production has seasonally improved. However, in some areas of southern Somali Region, a high prevalence of camel abortions, suspected to be the outcome of trypanosomiasis, are limiting camel milk availability.

Although the October to December *Deyr* rains regenerated pasture, their erratic temporal distribution with long dry spells was insufficient for crop production in the agropastoral areas in southern Somali Region. Poor runoff from adjacent highland areas compounded the lack of rain, and *Deyr* crop production is below average. In addition, in July, there was no favorable river flooding along the Wabi Shebelle, Dawa, and Web Rivers, which significantly reduced crop production in riverine areas. In general, only 20 to 30 percent of average *Deyr* production is expected by the end of February. On the other hand, while crop production is anticipated to be good in the midlands and highlands of Borena and Guji Zones, crops are also performing poorly in the agropastoral, lowlands in these zones and in South Omo in SNNPR.

Staple food availability is poor due to lack of local crop production and limited supply from nearby highland areas, especially East and West Hararghe. The main source of staple food in southern Somali Region right now is from relief efforts or Productive Safety Nets Program (PSNP) food distributions. Prices for relief wheat have shown a significant decline since July in Shabelle (formerly Gode), Nogob (formerly Fik), Dollo (formerly Warder), and Jarar (formerly Deghabur) Zones due to regular food aid distributions. Also, controls are in place along major roads to prevent relief wheat on heavy capacity trucks from southern Somali Region being sold to the main urban areas like Jijiga and Dire Dawa. Despite these declines, prices are still high compared to the five-year average with sorghum and maize being 40 to 60 percent above their five-year averages. Imported food commodities like rice and sugar also have high prices. For instance, sugar prices are 45 percent above the five-year average in Fafan zone. Livestock prices, particularly the prices for camels, goats, and sheep, have increased since last year and are above their five-year averages. For instance, in Shabelle (formerly Gode) Zone, the price for an average quality local goat or sheep increased from ETB 900 in December 2011 to ETB 1,400 in December 2012, a 55 percent increase. However, a slight seasonable decline in livestock prices has occurred since September 2012, primarily as export demand from the Middle East has seasonally declined.

Poor households are currently able to meet their minimally adequate food needs through market purchases and milk, and these areas are primarily classified at Stressed (IPC level 2). However, poor households in the areas that had poorer rainfall

in Elwayn, parts of Danan and East Imey Woredas of Shabelle (formerly Gode) Zone, West Imey, Raso, Dollo Bay, and Barey Woredas in Afder Zone, and Dollo Ado in Liben Zone are in Crisis (IPC level 3).

Assumptions

In addition to the general assumptions given at the national level, for January to June, the projected food security outcomes for the southern and southeastern pastoral and agropastoral areas are based on the following assumptions:

- Seasonally low external demand for livestock from the Middle East markets is likely to further reduce livestock prices between January and May, but prices will likely start to rise in June in anticipation of exports and increased domestic demand for Ramadan in July.
- Resource-based conflict between pastoralists and between pastoralists and other populations is especially likely during the January to March dry season, especially in areas near the Somali Region's border with Oromia.

Most Likely Food Security Outcomes

Labor opportunities typically decline during the January to March dry season in southern Somali as there is not demand for planting, weeding, or harvesting in riverine areas. The only casual labor opportunities during the dry season involve building, water supply constructions, and private home construction for the better off. These activities tend not to accommodate a large number of labor seekers. Similarly, income from other sources will also be minimal. *Busa Gonofa*, a form of social solidarity with the better off providing gifts for poorer households, has also declined in the southeastern pastoral and agropastoral areas due to recurrent drought in the zone reducing the total wealth and livestock holdings of the better off.

Following relatively normal sources of food and income from the *Deyr/Hageya* season and with anticipated near normal *Gu/Genna* rains, poor and very poor households in Jarar (formerly Degehabur), Dollo (formerly Warder), parts of Nogob (formerly Fik), and Borena Zones are likely to be able to maintain minimally adequate food consumption with milk, saved labor income, and livestock sales, but they will be unable to afford some essential nonfood expenditure. Therefore these areas will be classified as Stressed (IPC level 2) from January until at least June 2013. On the other hand, the regenerated pasture currently available in Shabelle (formerly Gode), some parts of Nogob (formerly Fik), Korahe, Afder, and Liben Zones is expected to deteriorate soon due to high temperatures, affecting the productivity of livestock. During the January to March lean season, poor and very poor households will face Crisis (IPC Phase 3), but following the assumed normal *Gu/Genna* rain and associated improvements in pasture, browse, and water availability, then in livestock body conditions and milk availability, poor and very poor households will move into Stress (IPC Phase 2) from April to June. The food security situation in areas like Elwayn, parts of Danan, and East Imey Woredas in Shabelle (formerly Gode) Zone, West Imey, Raso, Dolobay, and Barey Woredas in Afder Zone, and Dollo Ado in Liben Zone that had a very poor June to September *Karan* and October to December *Hagaya* rains are not expected to improve, even with the anticipated normal March to May *Gu/Genna* rains. Accordingly, poor and very poor households in these areas will still remain in Crisis (IPC Phase 3) from January until at least June 2013.

Major sweet potato-growing zones and dominantly *Belg*-producing southern woredas of SNNPR

Current Situation

The pattern of the last two consecutive rainy seasons was generally intermittent in some parts of the region in terms of its start, amount, distribution, and cessation. The poor February to May *Belg* 2012 rains were followed by the relatively good start but uneven distribution and two week early cessation of the June to September *Kiremt* 2012. The early cessation of rain was observed in Kembata, Hadiya, Gurage, and Silte Zones, and Halaba Special Woreda. After a long dry spell in August and September, unseasonable rains continued in the months of November and December 2012 in some parts of Gamo Gofa, Dawro, Wolaita, Sidama, and Gedeo Zones.

The erratic rains resulted in poor land preparation, late planting, reduced area planted, and poor crop development in most lowland areas. The extended dry spell and early cessation of rains in September while crops were at the flowering stage resulted in significant yield reductions. Maize, teff, and haricot beans in Zala, Mirab Abaya, Kemba, and Kucha Woredas in

Gamo Gofa, Genna Bosa and Loma in Dawro, Duguna Fango, Damot Woyde, Humbo, Boloso Bombe, Damot Gale, and Boloso Sore Woredas of Wolaita Zones were critically affected by early cessation of the *Kiremt* rains while these crops were flowering. Similarly, hot peppers and cereals in Sodo, Meskane, and Mareko Woredas in Gurage, Lanfuro, Silti, Sankura, and parts of Dalocha Woredas of Silte Zone were also affected by moisture stress.

A shortage of sweet potato cuttings led to a 38 percent decline in area planted compared to average. Combined with the erratic rains, sweet potato production was less than average. Coffee production is also much lower than average because of the poor February to May *Belg* 2012 rains during flowering in April and May, which was also accompanied by damage from coffee berry disease (CBD). These hazards have affected the coffee-producing areas in Gedeo, Sidama, parts of Wolaita, and Kembata-Tembaro Zones. In the coffee-producing areas, poor households may obtain up to 40 percent of their income from coffee sales or 45 percent from coffee labor, and inhabitants from nearby zones also migrate to these areas to work on coffee. In addition to the lack of rain at key points in the growing season, other natural hazards occurred including excess rain, floods, and hailstorms, which damaged crops in Gamo Gofa in Boreda, Arbaminch Zuria, Demba Gofa, Mirab Abaya, and Kamba Woredas, in Hadiya in Shashago Woreda, in Wolaita in Dugnafango Woreda, and in Silte in Lanfuro and Silti Woredas.

Currently, pasture and water availability are sufficient. The body conditions of livestock and their productivity remains normal. Crop residues, even from areas that had poor crops, are providing fodder. There have been no unusual herd movements reported nor livestock disease outbreaks with the exception of common diseases. Excess livestock mortality has not been reported, and in general, with poor cropping conditions, many households are increasingly depending on their livestock or livestock-related income.

Though there is an improved supply of food grain to the local market due to the new harvest in November and December 2012, staple food prices remain high in most areas and are increasing in some areas due to poor local production including at Gurage, Hadiya, Silte, Dawro and Halaba markets. The prices of cash crops are also declining significantly. For instance, the price of hot pepper declined from ETB 38 to ETB 30 per kilogram (kg) compared to same time last year. The prices of coffee and ginger have also decreased. The fall in international coffee prices has some influence on Ethiopian prices, the lower quality is a key factor in the declining farm gate prices. For ginger, ginger import volume and prices in Ethiopia's key export market in Sudan are relatively stable, but declining quality has reduced producer prices in SNNPR. Wage rates for coffee labor decreased with the decrease in coffee production and its price whereas the price of urban casual labor in towns has increased compared to recent years, absorbing some laborers. Livestock supply to the markets is stable and current prices for livestock are higher than in recent months or years.

Currently, households are trying to use find additional sources of food and income or diversify their sources of food and income to cover the losses of crops and supplement livestock production. Casual labor to urban areas, increased firewood collection, charcoal burning, grass selling, and petty trade are being intensified by the poor and very poor households. However, with the significant reduction in production and limited opportunities for poor and very poor households to expand their income from other source, the food insecurity is increasing. The *Meher* harvest from the current season has been being consumed since October 2012. As a result most poor and very poor households are currently able to access only minimally adequate food consumption from their own harvest and the market, but they are unable to afford some essential nonfood expenditures. Therefore, this area is classified at the Stressed (IPC Phase 2) level of food insecurity.

Assumptions

In addition to the general assumptions given at the national level, from January to June 2013, the projected food security outcomes for the major sweet potato-growing zones and dominantly *Belg*-producing southern woredas of SNNPR are based on the following assumptions:

- Shortages of local cereal seeds in March and April and sweet potato cuttings in January and May will likely raise their prices. Many households will be unable to find adequate seeds at affordable prices. While some households will continue to be targeted with free or low cost seeds or cuttings by humanitarian livelihood recovery programs, the gap between implied demand and the supply will likely remain high and largely uncovered.

Most Likely Food Security Outcomes

Despite the below average current *Meher* harvest in most parts of the areas, it contributed to improvements in food consumption. However, the new harvest is not expected to last much beyond the end of January. In a typical year, it lasts until March. As a result, the lean season in these areas is expected to start earlier than usual in February instead of March. The admission of malnourished children under five, pregnant and lactating women in to therapeutic feeding program (TFP) during the period September to November 2012 remained low compared to May to July 2012. However, it showed a slight increase in October and November 2012 again. This trend already indicates that malnutrition is likely to rise between January and June, especially with the start of the early lean season in February.

Traditionally, sweet potato production supplements food consumption from grain stocks in the months of February and March, with sweet potatoes planted in November serving as a “bridge” crop during the lean season, left in the ground or harvested on an as needed basis. The sweet potatoes will not fill this role this year due to the low area planted. This year’s low labor income, particularly from the coffee harvest and other agricultural activities, which normally contributes about 30 percent of total annual income, has declined. This has reduced food access for poor households during the January to June period when they are often very market dependent. The anticipated rise in staple food prices from January to June will further decrease the purchasing power of the poor households who depend on market purchases, especially after household stocks are exhausted in February.

To find additional food and income, poor households are likely to intensify various strategies including outward migration in search of wage labor, borrowing from better off households, consumption of wild foods, sale of firewood, charcoal, and grass, and switching expenditure from non-food items to food purchase. Some of these measures are being currently practiced, and they will be intensified between February and June. Some of these stratg that will threaten their future livelihood. Even with seeking additional income and food and employing coping strategies, poor household will still reach the Crisis (IPC Phase 3) level of food insecurity from January through March in some areas.

Eastern, marginal, *Meher*-producing areas

Current Situation

The June to September *Kiremt* rains in 2012 were generally favorable for near normal performance of *Meher* crops in some parts of the eastern, marginal, *Meher*-producing areas. However, in the lowlands of East and West Hararghe, Bale, Arsi, West Arsi, West Shewa, and North Shewa in Oromia, in some eastern parts of Tigray, and in some lowlands of eastern Amhara, the rains started well but were erratic and in many places, ceased early. This led to below average *Meher* production. Long-cycle maize and sorghum are planted in April and May using moisture from the February to April *Belg* rains. These varieties yield more than short-cycle varieties planted later in the year, and in some areas, these crops can , cover up to 75 percent of annual food needs. These crops were often not planted or were planted late due to the poor *Belg* rains. The area under these crops declined considerably as the ground was too dry during the planting window. Those that were planted late did not reach maturity, as the length of the growing period was significantly reduced by both late planting and the early withdrawal of the *Kiremt* rains in some areas. In addition to the poor performance of long-cycle crops, there were highly localized occurrences of long dry spells, hailstorms, flash floods, water logging, landslides, frosts, crop pests, plant diseases, and unseasonable rainfall in October and November that damaged crops and reduced yields. All of these factors have led to overall below average production in eastern, marginal *Meher*-producing areas. East and West Hararghe are among the areas where production was especially far below average . According to the end-of-year, multi-agency needs assessment, the overall decline in production in several woredas in East and West Hararghe is likely only around 30 percent of the 2011 or five-year average. Well below average crop production was also reported in some parts of eastern Tigray and Amhara.

Due to the positive impact of the recent *Kiremt* rains, water and pasture availability, livestock body conditions, and livestock productivity are all near normal over most of the eastern, marginal, *Meher*-producing areas. However, there are some lowland areas in eastern Oromia and parts of the eastern half of Tigray and Amhara where the situation remains below average or poor. Shortages in pasture or water are significant in Kumbi, Meyu Muluke, Babile, Gursum, Chinaksen, Gole Oda, Kurfachele, Hawi Gudina, Burka Dimtu, Oda Bultum, Mieso, Gemechis, and Darolebu Woredas in East and West Hararghe, Dewe Kechen, Raytu, Dewe Serer, and Sewena Woredas in Bale, Telemt, Ziquala, and Sehallu Woredas in

Amhara, Erob, Raya Azebo, and Hintalo Wajirat in Tigray. In an attempt to deal with the problem, unusually early livestock migrations to neighboring river valleys or dry season grazing grounds have already occurred in some areas.

Since the start of the *Meher* harvest in October, slight to moderate declines in cereal prices have been observed in many markets due to slight increases in local food supply. In spite of this, December food prices still remain elevated above 2011 and their five-year averages. In East and West Hararghe, grain prices on some markets have increased between 20 and 30 percent since the start of the harvest in October. While generally malnutrition has likely decreased following the *Meher* harvest, there are signs of increased malnutrition in the areas where crops failed or very little harvest was obtained. For example, in 2012, over 10,000 moderately malnourished children between six and 59 months of age were admitted to the Outreach Therapeutic Program (OTP) in East and West Hararghe Zones.

Assumptions

The national assumptions all apply in the eastern, marginal, *Meher*-producing areas, and no additional assumptions have been made for these areas.

Most Likely Food Security Outcomes

Due to the successive poor seasons that resulted in below average crop performance, the poor and very poor households in eastern and southern Tigray, Wag Hamira Zone in Amhara Region, and East and West Hararghe Zone in Oromia Region will likely engage in coping over the next several months.. Poor households in the above mentioned areas will remain in Crisis (IPC Phase 3) through at least June.

Poor February to April *Belg* rains led to poor *Belg* production and poor planted area for long-cycle crops. This has been followed by below normal *Meher* crop production in most parts of North and South Wollo. Households have reduced access to food from their own production and are increasingly dependent on market purchases. Expected increases in staple food prices will further reduce households' purchasing capacity. Poor and very poor households in the above mentioned parts of the eastern, marginal, *Meher*-producing areas will deteriorate to Crisis (IPC Phase 3) from February to June 2013. In the remaining parts of the eastern, marginal, *Meher*-producing areas, crop production was relatively better and these areas will remain classified at the Stressed (IPC Phase 2) level food insecurity from January to June 2013. In most areas, few improvements in food security are expected within the January to June period, though the near normal expected *Belg* rains would likely result in improvements later in the year.

Afar and northern Somali Region

Current Situation

The June to September *Karma* rains in Afar Region were inconsistent, leaving some kebeles with little or no rains while some areas had shorter-lasting, very heavy rains that caused floods. Accordingly, while the southern and central parts of Afar receive normal to slightly above normal total rainfall, the totals were below normal in the eastern and northeastern parts of the region. Particularly, areas like Elidaar, Serdo, and Kori in Zone 1 and most parts of Zones 2 and 4 experienced insufficient rain during the June to September 2012 *Karma* season. This difference in the amount and distribution of *Karma* rains resulted in wide differences in the availability of pasture and water in different parts of the region. Accordingly, Zone 3, 5, and parts of Zone 1 have relatively good pasture conditions, which are expected to support livestock grazing until the next rains start in March to April. The poor performance of this year's *Karma* rains and the cumulative effects of recurrent drought in the northern parts of Afar though have significantly hampered the regeneration of pasture and browse. They have even been insufficient for water, and the availability of water is poor. Although good crop performance was anticipated based on the *Karma* rain performance from mid-July to mid-August in agropastoral areas of the Afar Region, the early cessation of the rains, floods, and lack of water for irrigation due to changes in river courses affected the growth of maize, sorghum, and teff. This resulted in poor crop performance during the *Karma* rainy season.

The overall performance of the June to September *Karan* rains in the northern part of Somali Region was near normal and showed an improvement in pasture and water availability in both Siti (formerly Shinile) and Fafan (formerly Jijiga) Zones. Despite these improvements, the early secession of *Karan* rains and poor distribution over time and space have led to acute

water shortages in Ayisha, Haidigala, parts of Shinile, and parts of Afdem Woredas in Siti (formerly Shinile) Zone. On the other hand, Fafan (formerly Jijiga) Zone has wider availability of pasture and water since the amount and the distribution of *Karan* rain was much better in this zone like it was in neighboring areas of Somalia. Except in the woredas in Siti (formerly Shinile) Zone with water shortages, the livestock body conditions have improved since the start of the *Karan* rains in June. Milk production has been relatively normal in most parts of Fafan (formerly Jijiga) Zone and in Afdem, Dambel, Meiso, and Erer Woredas in Siti (formerly Shinile) Zone. Less milk production was observed in Ayisha, Hadagala, and Shinile Woredas of Siti (formerly Shinile) Zone as these areas had lower livestock birth rates during the rains and herd sizes are still recovering from previous losses. Despite the near normal June to September 2012 *Karan* rains in the northern parts of Somali Region, the performance of crops in agropastoral areas was poor. The rains were not sufficiently distributed temporally to provide sufficient soil moisture for more normal crop production conditions. Also, the late onset of March to May *Gu* rains resulted in late planting. The early cessation of the *Karan* as well as moisture stress during the season means that many of the crops failed to mature past the vegetative stage or were damaged before reaching the maturity stage.

In addition to the influence prices in neighboring regions' markets, cereal prices both in Afar and in northern Somali Region are affected by the volume of relief food both kept by households and held by traders. Currently, no significant, post-*Meher* harvest decline of prices has been observed in the neighboring markets of these two regions. Over the past year, both relief food distributions and PSNP distributions were delayed at various times in many woredas limiting the positive impact relief food often has on prices. Cereal prices remain at elevated levels. Currently, livestock prices are low both due to the seasonal decline in export demand from the Middle East that follows the end of the Hajj and due to the poor physical condition of livestock brought to markets from the water- and pasture-deficit areas. Poor and very poor households though have few livestock to sell due to the significant decline in their herd sizes as a result of recurrent drought. For example, in Elidaar Woreda in Afar Region, camel holdings and goat holdings were only 50 percent and 80 percent, respectively, of their 2006 baseline levels.

Pastoralists in most parts of Zones 5, 3, and parts of 1 in Afar Region, some parts of Siti (formerly Shinile) Zone, and most parts of Fafan (formerly Jijiga) Zone that received a relatively better June to September *Karma/Karan* rains are able to attain their minimally adequate food consumption through sales of livestock and consumption and sales of livestock products. However, they are still classified as Stressed (IPC Phase 2), being not able to afford some essential non-food expenditures. In most parts of Zone 2 and Zone 4, in and Elidaar, Serdo, and Kori Woredas in Zone 1 in Afar Region, in most parts of Shinile and Harshin Woredas in Fafan (formerly Jijiga) Zone, a variety of hazards have reduced food access. Most significant have been water shortages, some of which have lasted more or less since 2010. Also, land degradation, increasing cereal prices, and declining of livestock prices have harmed pastoral livelihoods. Poor households in the above mentioned areas are in Crisis (IPC Phase 3).

Assumptions

In addition to the general assumptions given at the national level, over the coming six months, projected food security outcomes for Afar and northern Somali are based on the following assumptions:

- In the period January to March, unusually early and large-scale migration of livestock herds from the northern parts of Afar and Siti (formerly Shinile) Zone in northern Somali to nearby areas is expected in search of water and pasture. Migrations which would typically take place during the dry season in January and February have already started as early as November and December, and further migration is expected, unusual in both its scale and timing.
- In some parts of northern Somali, resource-based, inter-clan conflict is likely to occur during the ongoing January to March dry *Jilal* season.
- As the dry season progresses, livestock prices in Afar and northern Somali are expected to decline, primarily due to the the poor livestock body condition, but also due to the seasonal decline in demand from the Middle East.

Most Likely Food Security Outcomes

The below normal *Karma* rains in Zones 2 and 4 as well as in and Woredas like Elidaar, Serdo, and Kori in Zone 1 in Afar Region led to deteriorating livestock body conditions. Poor households are not likely to benefit from the anticipated near normal March to May *Sugum* rains as their livestock holdings are depleted due to recurrent drought and they have few pregnant animals likely to lactate during the rains. While body conditions of livestock may improve, total livestock holdings

will take multiple good seasons to rebuild. Poor households are likely unable to afford adequate quantity and quality of food from January to June 2013. In addition, expected price increases for staple foods as well as declining and seasonal low livestock prices will continue to hold down livestock-to-cereal terms of trade (ToT).. Accordingly, with limited purchasing power from their limited livestock holdings, poor and very poor households Zone 2, Zone 4, and Woredas like Elidaar, Serdo, and Kori in Zone 1 in Afar will experience the Crisis (IPC Phase 3) level of food insecurity from January to June 2013. Similarly, the early cessation of *Karan* rain in parts of Siti (formerly Shinile) Zone that reduced crop germination has led to low crop production in Shinile, Erer, Dembel, and Ayisha Woredas in Siti (formerly Shinile) Zone. This has reduced income from crop sales and reduced the supply of locally produced grain to the market.

In addition, the well below normal June to September 2012 *Karan* rains in Harshin Woreda of Fafan (formerly Jijiga) Zone were low enough to affect the availability of pasture and reduce crop performance. Since the *Karan* rains are the primary rainy season for agropastoral households to grow crops, and poor households will only be able to meet their food needs through accelerated depletion of remaining assets. Therefore, poor households in Shinile, Erer, Dembel, and Ayisha Woredas in Siti (formerly Shinile) Zone and Harshin Woreda in Fafan (formerly Jijiga) Zone will remain in the Crisis (IPC Phase 3) from January to June.

In the rest of Afar and northern Somali, the relatively better June to September 2012 *Karma/Karan* rains improved pasture and water availability. Poor households will have minimally adequate food consumption from livestock products and market purchases funded by sales of livestock and livestock products. The assumed large-scale migration of livestock and resource-based and inter-clan conflicts will reduce the positive impacts of the expected near normal March to May *Gu/Sugum* rains. Therefore, poor households will remain Stressed (IPC Phase 2) from January to June.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Area	Event	Impact on food security outcomes
Belg-producing areas	A late start and/or below average amount of Belg rains from February to May 2013	The planted area under long-cycle crops remains low, which reduces total Meher harvest from October to December. Also, in Belg-producing areas, the Belg crop is reduced, increasing demand on market supplies and decreasing labor opportunities associated with Belg crop production.
Pastoral areas	Interventions by the government or humanitarian agencies to improve water supply and water infrastructure	Improved water access at the household level reduces the amount spent on water or time spent collecting water or migrating to watering points, allowing additional time for other livelihood strategies such as casual labor and decreasing household expenses for water.
Nationwide	Increased food grain supply to the markets by increased imports by the Ethiopia Grain Trade Enterprise (EGTE) or other importers	Increased supply would help stabilize or reduce retail prices for staple foods.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.