

SPECIAL REPORT

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT MISSION TO ETHIOPIA

(Phase 2)

**Integrating the Crop and Food Supply and the
Emergency Food Security Assessments**

27 July 2009



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS, ROME



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TABLE OF CONTENTS

	<u>Page</u>
Mission Highlights	4
1. <u>INTRODUCTION</u>	5
2. <u>MEHER 2008/09 PRODUCTION AND THE OVERALL FOOD SUPPLY/DEMAND SITUATION</u>	5
3. <u>ECONOMIC SITUATION AND PRICE TRENDS</u>	6
3.1 Macro-economic situation.....	6
3.2 External sector.....	7
3.3 Inflation.....	7
3.4 Cereal prices.....	8
4. <u>FOOD SECURITY AND EMERGENCY NEEDS AT HOUSEHOLD LEVEL</u>	9
4.1 Results of the December 2008 <i>Meher</i> emergency needs assessments.....	9
4.2 The current situation, prospects, and needs for assistance.....	10
4.3 Nutritional conditions.....	14
4.4 Affected populations and food assistance requirements.....	15
4.5 Response to food insecurity.....	15
4.6 Conclusions.....	16
5. <u>REFLECTIONS ON THE 20082009CFSAM PROCESS AND RECOMMENDATIONS FOR FUTURE CFSAMs AND ASSOCIATED MEHER EFSAs</u>	17
5.1 Recommendations.....	17
ANNEX 1 Ethiopia rainfall calendar	18
ANNEX 2 Regional summaries based on the seasonal assessments and populations in need of food assistance	19
ANNEX 3 Estimated persons in need of food assistance by region – figures presented as found – not analysed	22
ANNEX 4 OTP Admission statistics (SNNPR February – May 2009)	25
ANNEX 5 Seasonal calendar and update for the Belg rains as at May 2009	26

Mission Highlights

The CFSAM phase-2 mission sought to integrate the findings from two assessments that took place in November and December 2008: the FAO Crop and Food Supply Assessment (phase-1) and the government-led, multi-agency Meher Emergency Food Security Assessment (EFSA). The highlights are as follows:

Food production, markets and prices

- In 2008, very significant progress was made by the Ministry of Agriculture and Rural Development (MoARD) and the Central Statistics Authority (CSA) in reconciling the long standing differences in crop area estimates through the EC-funded FAO project "Support to Food Security Information System". Accordingly, the Mission used, for the first time, pre-harvest planted area estimates generated by the annual sample survey of the CSA.
- CSA's post-harvest data for the 2008 Meher season indicate a cereal and pulse production from the private peasant sector of 16.46 million tonnes, about 6 percent above the previous year's post-harvest estimates. This was the fifth consecutive good Meher harvest. Adding the output of the commercial sector and a conservative forecast for the 2009 Belg season, the total estimate of cereals and pulses production in 2008/09 is put at 17.39 million tonnes.
- With an estimated total cereal and pulse utilization of about 18.26 million tonnes, total import requirements for 2009 marketing year (January/December) are forecast at 695 000 tonnes. Latest available data indicate that up to end of April 2009, 283 000 tonnes have already been imported (of which 259 000 as food aid).
- Throughout the country, cereal prices reached a record level in September 2008 and dropped by 26 percent in December 2008, reflecting the improved 2008 Meher production and the general decrease in international food prices. Cereal prices have since stabilised throughout the first half of 2009, but still remain at above average levels, with national cereal prices 15 percent above a two year average (May 2007 – May 2009) in May 2009.

Household food security and emergency needs

- Although the overall Meher crop production has been improving over the last five years there are still households that are food insecure. These are the 7.5 million persons chronically food insecure under the productive safety net programme (PSNP) and an additional 4.9 million people facing acute food insecurity for the period January to June 2009. This population is mainly due to the failure of 2008 Belg rains that affected crop production; the poor coffee and root crops especially in Southern Nations Nationalities Peoples' Region (SNNPR) and three almost consecutive poor Gu rains affecting pastoralists. Hence, the populations in need of food assistance are spread mostly over the eastern half of the country, with the most affected areas in Somali, Amhara, SNNP, Tigray and Afar regions. As a result, in addition to supporting the PSNP beneficiaries, the government and its partners needed approximately 591 503 tonnes of food to support the extra caseload of 4.9 million persons between January and June 2009.
- Reports from the field indicate that the 2009 Belg rains have performed poorly but not as badly as the 2008 Belg that were considered as total failure. The 2007 Meher assessment had predicted that a total population of 2.2 million would need food assistance for the 2008 calendar year. However after the failure of 2008 Belg, this figure was revised upwards to 4.6 million in April and again to 6.4 million by August. Judging by performance of the 2009 Belg so far, this mission believes that the total number of persons in need of food assistance will be similar to the 6.4 million in 2008. While the ongoing Belg assessment will shed more light on proper estimates of persons in need of food assistance, if the numbers in need of food assistance increase, there will be a corresponding increase in the amount of food needed.

Recommendations for future CFSAMs and associated Meher assessments

- There have been improvements in the way Meher assessment is carried out. Previously the assessment used to come up with only food needs. The 2008 Meher assessment identified other factors that affect food security at the household level and included emergency needs for water, sanitation, health, nutrition. In some cases education needs were also identified. This mission recommends that this trend be enhanced through training of teams on how to assess needs in other non food sectors.

- All the Meher assessment teams, except in Gambela and Benshagul Gumuz, used the household economy approach (HEA) to derive the numbers of people in need of food assistance. There is need for a closer linkage in the analysis of the food and non food needs, as different approaches seem to be used.
- As in other years, for the Meher need assessment, the multi agency assessment teams and regions compiled reports and sent them to the federal government. After reports are received at the federal level, most of the participating agencies are not consulted when the federal and regional governments revise some of the numbers of persons in need of food assistance. In the true spirit of partnerships; it is recommended that the whole assessment process remains transparent from the training, data gathering and processing and final analysis at the federal level.

Recommendations to deal with anticipated food insecurity

- The government has intervened by supporting the urban poor through the stabilization program. The rural poor who depend on crop and livestock production should continue to be supported with food assistance up to November 2009 when it is expected that the Meher green crops will start to be consumed and livestock condition may have improved (if Meher rains are normal).
- The monitoring of food prices in affected areas should be continued and enhanced, especially in Somali region.
- In view of the poor performance of Belg rains the government and agencies are encouraged to put in place contingency plans to address possible increased food assistance needs up to December 2009.

1. INTRODUCTION

The FAO together with Ministry of Agriculture and Rural Development (MoARD), the Bureau of Agriculture and Rural Development (BoARD) and the Central Statistical Agency (CSA), participated in the 2008/09 FAO/WFP Crop and Food Security Assessment Mission (CFSAM) from 16 November to 12 December 2008. The assessment concentrated on aggregate crop production and macro-economic issues and also analyzed the resultant cereal supply/demand. The Meher needs assessment led by Disaster Management and Food Security Sector (DMFSS) together with other partners, including WFP, was conducted from 17 November to 12 December 2008 and concentrated on the assessment of emergency food and non-food needs, at the micro/household level. Hence, this report represents a synthesis of the main results and recommendations of the two assessments carried out towards the end of last year with some updates due to the availability of new information.

Following an agreement between the CSA and the MoARD, the basis for the calculations of the 2008 Meher cereals and beans production in Ethiopia was based on CSA pre-harvest planted area estimates and not by MoARD data as in the past. The decision by MoARD and CSA to work together in using one data set resolved the past technical and methodological issues. The EC-funded FAO implemented Project "Support to Food Security Information System" whose objective is, inter alia, to reconcile the long-standing differences in planted area estimates, supported the process.

2. MEHER 2008/09 PRODUCTION AND THE OVERALL FOOD SUPPLY/DEMAND SITUATION

The CSA post-harvest grain production estimates indicate a total 2008 Meher cereal and pulse production (only of private peasant holdings) at 16.46 million tonnes, about 6 percent above 2007 CSA estimates. This figure is 3.8 percent less than the pre-harvest estimates reported by the CFSAM in January 2009. This is the fifth consecutive year of good Meher grain harvest and mainly attributed to well-distributed Meher rainfall in major producing areas, the higher financial returns prompting increased investment in farming operations, the wider use and timely availability of inputs, and the effective control of migratory pests.

When production of commercial sub-sector is added to CSA post-harvest data, the 2008 national Meher production of cereals and pulses is estimated at 16.79 million tonnes. With a Belg production to be harvested in July/August 2009 conservatively anticipated by the Mission at 600 000 tonnes, total domestic availability of cereal and pulses for 2009 is estimated at 17.39 million tonnes. Assuming a per capita average consumption of 185 kg of cereals and pulses, about 6 percent lower than the previous year as a consequence of the rising prices, total utilization is estimated at 18.26 million tonnes. Total import requirement is therefore estimated at 695 000 tonnes. Available data on imports

indicate some 283 000 tonnes of cereals have been already imported up to the end of April 2009 either commercially or as food aid. Table 1 shows the updated national food balance sheet based on the CSA post-harvest data on area planted and production.

Table 1. Ethiopia: Grain supply/demand balance, 2009 (tonnes)

	Teff	Wheat	Barley	Maize	Sorghum	Finger Millet	Others	Total cereals	Pulses	Cereals & Pulses
Domestic availability	3 080	2 679	1 672	4 438	2 985	536	141	15 532	2 067	17 599
Opening stocks	22	25	30	40	30		12	159	55	214
Total production	3 058	2 654	1 642	4 398	2 955	536	129	15 373	2 012	17 385
<i>Meher</i>	3 028	2 589	1 522	4 098	2 934	533	114	14 819	1 966	16 785
<i>Belg</i>	30	65	120	300	21	3	15	554	46	600
Total utilization	3 080	3 142	1 672	4 555	3 065	536	141	16 191	2 067	18 258
Food use	2 793	2 598	1 191	3 282	2 540	469	117	12 991	1 465	14 456
Seed use	88	214	116	58	24	33	6	539	164	704
Feed use	0	0	150	100	150	0	0	400	0	400
Losses and other uses	153	318	197	1 099	296	27	13	2 103	302	2 405
Exports	25	0	0	0	35	0	0	60	115	175
Closing stocks	21	12	17	15	21	8	5	98	21	119
Total import requirement		463		152	80			695		695
Comm. imports as end April 09		25						25		25
Food aid imports as end April 09		144		35	80			259		259

3. ECONOMIC SITUATION AND PRICE TRENDS

3.1 Macro-economic situation

The Ethiopian economy has experienced a broad-based and steady growth of real GDP over the past five fiscal years, averaging 11.5 percent since 2003/04, with real GDP growth in 2007/08 estimated at 11.6 percent¹. However, as a consequence of the international economic downturn, lower investments and a contraction of remittances, GDP growth is forecast to decline to 6.5² percent in 2009. The main determinant of Ethiopia's recent economic growth has been the expansion of agricultural production. However, significant contributions from the manufacturing and service sector as well as increasing construction projects in several urban areas are also fundamental factors.

Nominal domestic revenue is forecast to continue its increasing trend during 2008/09. This reflects some improvements in the national system of tax collection and administration, as well as a rise in donor funding. The newly formed Ethiopian Revenue and Custom Authority has implemented a number of new initiatives in 2009 to improve the system of value added tax (VAT) collection, which is

¹ National Bank of Ethiopia

² Source: IMF Economic Outlook April 2009

expected to further increase domestic tax revenue (total direct taxes have been projected to increase by 65 percent in 2008/09, compared to previous fiscal year). The fiscal balance is estimated to shrink further, but still remain in deficit, to approximately 1.5 percent in 2008/09³, as the Government continues to tighten fiscal policy, eliminate domestic borrowing and reduce public enterprise borrowing to 1.1-2.2 percent of GDP in 2008/09, from 4.4 percent in 2007/08. The eradication of oil subsidies in October 2008 has also contributed to lower public expenditure and borrowing. With regard to monetary policy, the Government is committed to reducing money growth to below 20 percent in 2008/09, as a mechanism to stabilise prices and inflation expectations.

The currency continued to depreciate in 2009 to an average of USD 1=ETB 11.25 in June 2009, mainly driven by the tight situation of foreign-exchange reserves, depleted by an increasing import bill. Some relief on foreign reserves is expected to take place in 2009 due to the disbursement of new grants, concessional loans by the donor community and as a result of lower import prices. Furthermore, the depreciation of the currency is expected to support Ethiopia's export competitiveness, by offsetting the effects of an increase in the real exchange rate, and ensure a sustainable balance of payments.

3.2 External sector

Total export earnings have registered substantial growth in recent years, owing to both increases in volume and revival in the prices of major exports in the international market. Conversely, the high import prices of some commodities, including food and oil, enlarged the import bill significantly in 2007/08, negatively impacting the balance of payments and creating a record trade deficit of USD 5.35 billion. However, the decline in international food and oil prices are anticipated to reduce the national import bill for 2008/09. The global recession in industrialised countries is likely to weaken demand for Ethiopian exports in 2009, reducing external revenue, which will be further exacerbated due to a contraction of international prices for key commodities, such as coffee. In conclusion, the reduction in remittances, foreign direct investment as well as the lower demand for Ethiopian exports is expected to offset the positive effect of the lower import prices and maintain a current-account deficit of 7.1 percent⁴ in 2008/09.

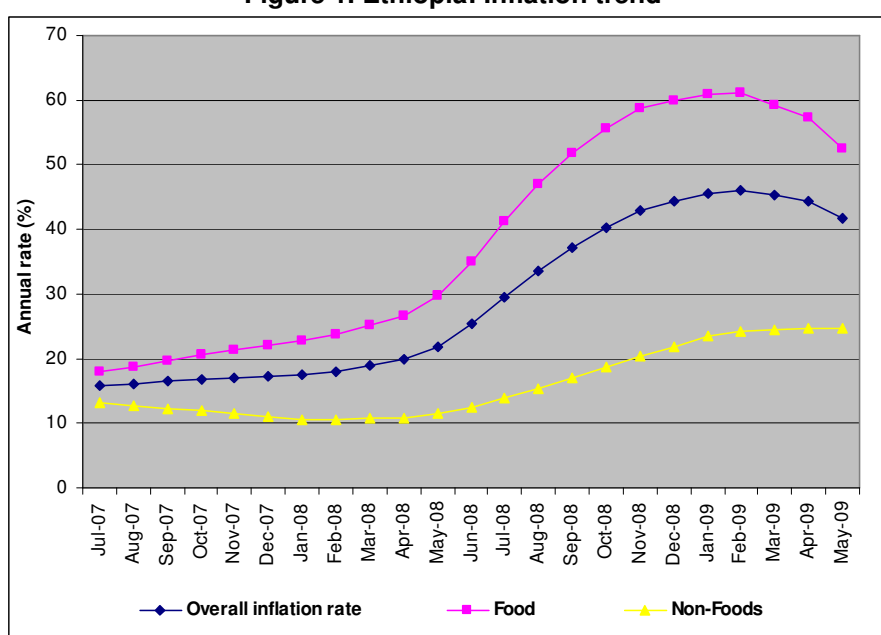
3.3 Inflation

Since the end of 2004, despite coinciding with the first of five bumper harvests (and preceding the soaring of international food prices), consumer food prices in Ethiopia started to climb steadily, as a result of strong demand pull factors. The overall annual inflation rate accelerated during mid-2008 and peaked in February 2009, reaching an average rate of 46.1 percent (based on 12-month moving average), while national food inflation reached a record rate of 61.1 percent during the same month. High international food prices, a weakened currency, expanding consumer demand and the partial failure of the 2008 Belg harvest are considered to be contributing factors. However, national inflation has shown signs of stabilising and decreased moderately between February and May 2009, but still remains 23.2 percentage points above the annual average (July 2007-June 2008). Similarly, in May 2009 food inflation stood at 52.6 percent, a decline of 8.5 percentage points since climbing to the record rate in February 2009, but still remains 29 percentage points above the average.

³ Source: IMF

⁴ Source: EIU Ethiopia Country Report May 2009

Figure 1. Ethiopia: Inflation trend



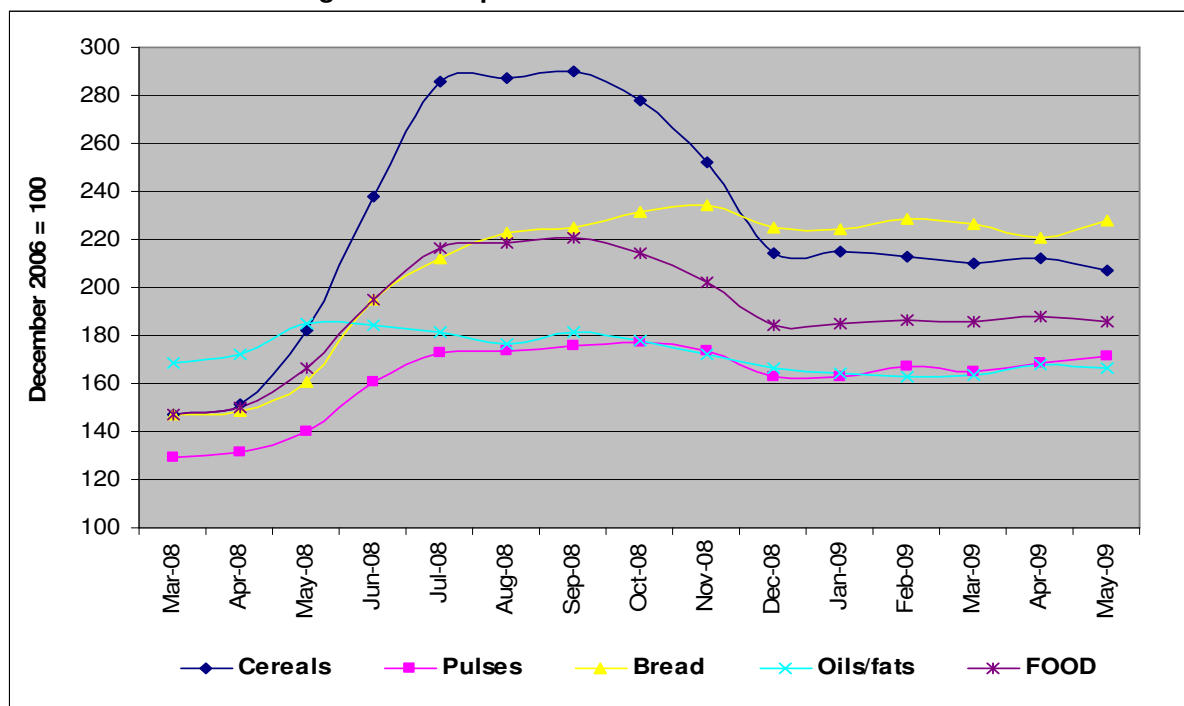
3.4 Cereal prices

Between March and September 2008, the national cereal price index doubled and reached a peak of 290.2 index points (December 2006 = 100), coinciding with the partial failure of the Belg season (see Figure 2). However, cereal prices (whose weight is about 23 percent of national CPI) dropped significantly from September to December 2008, reflecting the improved 2008 Meher production and the general decrease in international food prices. Cereal prices have since stabilised, and declined marginally, between December and May 2009, but still remain at above average levels. At regional level, cereal price fluctuations differ and high prices persist especially in the Somali Region, Benishangul Gumuz, Gambela and Addis Ababa, in comparison to prices observed in the same period last year. The particularly high prices recorded in the western regions of Benishangul Gumuz and Gambela have been partially attributed to the demand from the large number of Sudanese refugees as well as to the closer integration with the Sudanese market, which is more sensitive to international price fluctuations. The heterogeneity of regional food prices is also partly explained as a result of limited regional market integration, restricting trade between food surplus and food deficit regions. A recent study⁵ indicates that Addis Ababa, Amhara and Oromia markets share similar food prices fluctuations, suggesting greater integration.

A number of policies introduced by the Government to mitigate the high cereal prices experienced in 2008 have had a stabilising effect. The elimination of value added tax, turnover tax and surtaxes on selected food items have helped to control prices in urban markets. While, the distribution of subsidized imported wheat, approximately 3 percent of domestic wheat production, to low income urban families and directly to flour mills, has helped to maintain households' stocks and, to some extent, limit reliance on markets. Furthermore, the above average national cereal prices, 12 percent higher in May 2009 relative to last year's prices, is likely to have suppressed demand – taking into consideration that cereal expenditures account for approximately 50 percent of a households' food budget – contributing to maintaining price levels, but leading to consumption losses either in quantity and/or quality of food. However, in efforts to offset the negative impact of price increases and sustain income levels, the Government increased the cash transfer in the Productive Safety Net Programme to 10 ETB per day. Cereal prices are always forecast to increase during the lean season as household stocks diminish, peaking in August, until the beginning of the next Meher harvest in October. Furthermore, the anticipated low performance of the 2009 Belg harvest is likely to contribute to price increases during this period.

⁵ IFPRI Discussion Paper (00846) February 2009

Figure 2. Ethiopia: Consumer Price Index of food



4. FOOD SECURITY AND EMERGENCY NEEDS AT HOUSEHOLD LEVEL

Despite the good performance of 2008 Meher season and the anticipated increased crop production at the national level, food insecurity at the household level still exists for some groups of people in certain locations. These are the 7.5 million chronically food insecure people under the PSNP and an estimated 4.9 million persons in need of emergency food assistance for the period January to June 2009 estimated by the government led multi agency humanitarian needs assessment mission.

4.1 Results of the December 2008 Meher emergency needs assessments

The 2008 Belg was rated as below normal. Apart from supporting the Belg crop production in Belg dependent areas, the Belg rains are utilised to plant long cycle–high yielding varieties (maize, sorghum and finger millet) in Meher dependent areas. Thus a failure of the Belg rains usually leads to reduced Meher crop production. In 2008 Meher producing communities replanted their fields with short term, low-yielding varieties of crops leading to overall reduced crop production. Additionally during the 2008 Belg, in some areas the short term crops were reported to have been affected by low precipitation especially in the low-lying areas of Afar, Oromiya, SNNPR and southern Somali region.

The 2008 was a fifth consecutive good Meher production for the country. In addition to the good 2008 Meher season, the country experienced unexpected rainfall in October/November 2008 and in some parts January 2009. These rains were beneficial in replenishing water resources and encouraged pasture growth for livestock especially in livestock dependent regions of Afar and Somali. On the other hand these unexpected rains caused flooding in Gambela and low lying areas of Somali, Oromiya and SNNPR regions.

Overall agricultural performance of the 2008 Meher season was judged to be slightly better in the western zones and slightly worse in the eastern zones. Therefore people living in the eastern zones of the country were more likely to face food deficits in 2009. According to the humanitarian joint seasonal assessment⁶, food security situation in parts of the country including Eastern, Southern, South-eastern and some areas in Central zones of Tigray region; lowlands of North Shewa, Oromiya, South Wello and North Wello and Waghamara zones of Amhara region; in the low land areas of East and West Hararghe, Bale, Arsi, West Arsi and North Shewa zones of Oromiya region; and Dire Dawa region,

⁶ Joint government and humanitarian Partner's Document - January 2009 – Addis Ababa, Ethiopia

were expected to experience food insecurity in 2009. Some of the causes of food insecurity in these areas are a result of:

1. poor performance of the 2008 Belg which in turn affected Meher crop production,
2. general increase of food prices especially the cereals in 2008
3. insecurity in some areas of Benshagul Gumuz and southern and western parts of Somali region
4. floods in parts of Gambela region that destroyed flood recession planted crops
5. low demand for agricultural labour in SNNPR as a result of low coffee production brought about by 2008 Belg failure and
6. a reduction of livestock prices because of poor livestock body condition especially in Somali and Afar regions
7. clan conflicts especially in southern Somali region that has displaced approximately 200 000 persons.

4.2 The current situation, prospects, and needs for assistance

Notwithstanding the good Meher performance mentioned above, assessment teams in different regions estimated that 4.9 million persons⁷ would need food assistance from January to June 2009. (See annex on regional summaries for information regarding Meher performance, affected areas/woredas and estimated numbers of persons who may need food assistance)

All the assessment teams used the household economy approach (HEA) to determining emergency 2009 needs⁸ except in Gambela and Benshagul Gumuz regions where baseline data was being developed. In these two regions traditional methods were deployed to come up with needy persons. When applying the HEA, teams gather information related to prices of commodities, harvest prospects, and coping. This information is fed into spreadsheets that already contain baseline data and results are automatically generated regarding the percentage of populations that fall under survival⁹ and livelihood deficits. The mission was informed that teams included both survival and livelihood deficits when arriving at the number of persons in need of food assistance. In Woredas that are covered under PSNP the final figures were arrived at by subtracting the affected figure from those registered under PSNP.

⁷ This is additional to the 7.5 million persons currently benefiting from PSNP. Therefore a total of 12.4 will need support in 2009

⁸ Two scenarios were usually presented; the scenario showing that populations could utilize coping mechanisms and the second one where the populations were assumed that they would not cope. The second scenario was preferred to come up with the final figures for persons in need of emergency food assistance.

⁹ These are persons that have almost exhausted all coping mechanisms. The livelihood deficit group may still be able to cope by utilising some form of coping that in most cases is considered not sustainable.

Table 2. Ethiopia: Estimated number of persons in need of relief assistance for the year 2009 (January to June)

1 Region	2 Compiled by CFSAM 2008 ¹	3 2008 PSNP registered beneficiaries from DPPA	4 2009 PSNP registered beneficiaries	5 Regional estimates by the teams	6 Estimated population in need of food assistance from January to June 2009 ²
Afar	686 603	472 229	472 279	86 428	86 428
Amhara	2 520 157	2 519 829	2 519 829	1 366 331	995 095
B gumuz	N/A	N/A	N/A	35 232	35 233
Gambela	N/A	N/A	N/A	31 000	31 000
Oromiya	1 378 876	1 378 876	1 438 134	937 688	683 839
SNNP	1 439 413	1 298 981	1 459 160	922 402	881 739
Tigray	1 435 707	1 453 707	1 453 707	674 483	674 304
Somali	0	162 671	162 671	1 673 403	1 550 143
Dire Dawa		52 614	52 614	7 644	7 644
Harar		16 136	16 136	0	0
Total	7 547 301	7 192 372	7 574 530	5 577 445	4 945 425

¹ These figures were compiled from field reports by the 2nd phase CFSAM mission of 2008 since the official report had not yet been released by authorities at the time.

² These are in addition to 7.5 million under PSNP beneficiaries.

Note: 1) The registered PSNP beneficiaries for 2007 and 2008 were the same in all regions

2) Column 5; the figures are from the regional reports by assessment teams

3) Column 6; these are final official figures released by the government after consultations with regional authorities

Belg 2009 performance to date and implications for food security

The Belg rainfall forecast was a below normal as shown in the RFE precipitation anomaly (mm) February 1 – May 12, 2009

The Belg rains support crop production in the Somali region, Oromiya region lowlands of Bale, Guji and Borena zones. The rains are also important for some woredas of SNNPR where they account for 40-80 percent of the annual crop harvests. As stated earlier, in the regions of Tigray, Amhara, parts of north, central and eastern Oromiya and most areas of SNNPR the Belg rains are considered minor but they play an important role in supporting cultivation and planting of the long cycle Meher crops. In pastoral areas the Belg/gu/sugum are the main rains that support pasture and crop growth. See map below and seasonal calendar in the annex.

So far the delayed onset and erratic performance of the Belg and gu rains is likely to increase food insecurity in Belg crop-dependents and pastoral areas of SNNPR, parts of Oromiya and Amhara. Most of the Afar region also received below normal sugum rains between March and May¹⁰.

¹⁰ Source UNOCHA //horn of Africa alert June 2009

Figure 3. Ethiopia: Climate outlook

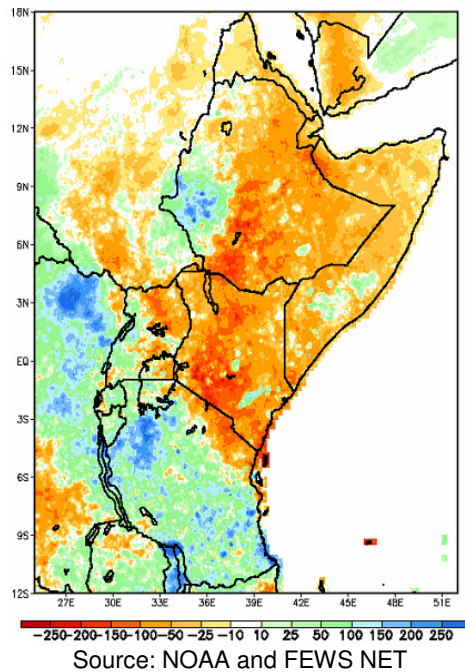
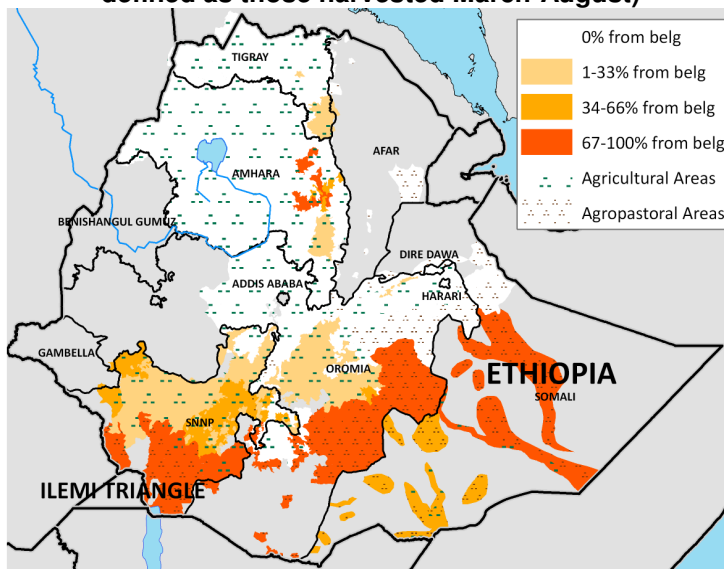


Figure 4. Ethiopia: Belg grain production as a percentage of total grain production (Belg crops defined as those harvested March-August)



Note: *Belg* rains are known as *gu* rains in southern Somali region and as *gana* rains in Oromiya
Source: Livelihoods Integration Unit, DMFSS, MOARD, Govt. of Ethiopia and graphics by FEWS NET Ethiopia

In the majority of the Belg¹¹ producing areas rains were received in late march as opposed to the typical of early march. Some locations experienced dry spells of 2-4 weeks after planting. The delayed rains affected planting. WFP reports emanating from the field indicate that only 50-70 percent of the land in the Belg areas had been planted by May 2009. The performance of Belg rains had been rated as below normal in most areas as a result of low precipitation and dry spells experienced in those areas.

According to FEWSNET, “the performance of the 2009 Belg season rains was erratic, with long dry spells, especially during the last dekad of April and the first dekad of May. These led to the wilting of

¹¹ Parts of Tigray, Amhara, SNNP and Oromiya regions.

maize, the most important Belg crop in most of these areas". Therefore Belg maize production has been affected in most areas of the country except SNNPR.

Information from various agencies interviewed indicated that the performance of Belg rains was poor but not as bad as the 2008 Belg which was considered as a total failure. The implications of below normal Belg rains can be summarized as:

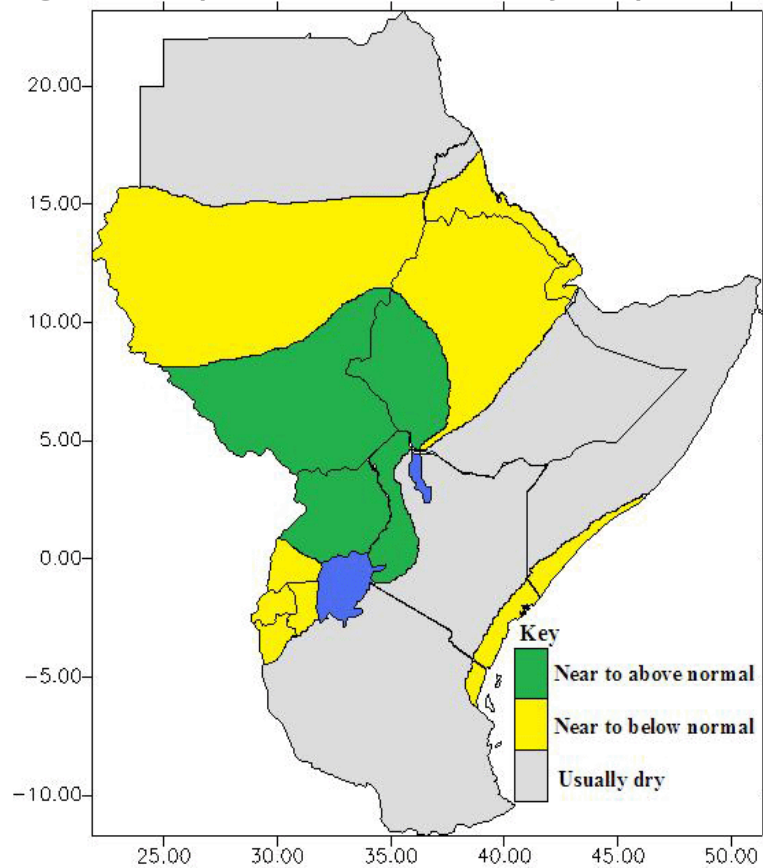
- The areas planted to crops will likely reduce thus leading to reduced Belg production
- Because of the delayed Belg rains, the long term crops will inevitably be planted late, therefore Meher late planted crops (especially teff) may be affected by the rains at harvesting further aggravating the Meher crop production.
- Production of coffee, sweet potatoes and enset crops in SNNPR will be lower notwithstanding the over consumption of the enset last year resulting from failed Belg of 2008.
- The Belg/Gu dependent pastoral areas may run out of water supplies sooner than normal and livestock migration may take place earlier than usual. In pastoral areas the terms of trade will be unfavourable as livestock body will deteriorate and prices of grain may increase in those areas.
- Pastoralists in the Southern zone of Somali region, neighbouring lowlands of Oromiya region and South Omo zone of SNNP region experienced below average rains in 2005/06, 2007, (gu and deyr), and 2008 (gu). The communities in these areas sold more of their livestock to access food and non food leading to reduced livestock herds. It will take three consecutive years for the livestock herds to reach baseline years. A below normal Belg will seriously hamper recovery and further affect food security of the households in pastoral areas.
- With reduced Belg and Meher harvests it is anticipated that prices of food will increase drastically and may be much higher than historical averages for the period from June/July to September/October 2009
- Possibilities of increased malnutrition in the country are eminent especially in the Somali region and parts of SNNP region.
- In coffee producing areas, the poor household that depend on labour to access incomes will be at risk of food insecurity because coffee production may reduce (so will labour opportunities).

Meher 2009 forecast

Forecasts for rainfall during the main cropping season and in northern pastoral areas are below normal, particularly in areas of the east where production was poor this year, raising concerns that a serious food crisis could emerge in Ethiopia over the next year¹². The IGAD Climate Prediction and Applications Centre (ICPAC) rainfall forecast for March to May 2009 for parts of northern Ethiopia was below normal to below normal. See map below.

¹² Source FEWSNET 24th June 2009

Figure 5. Ethiopia: Climate Outlook for July to September 2009



Source: IGAD Climate Prediction and Applications Centre (ICPAC)

After taking into account of the 2008 good Meher harvests in the country, the performance of the 2009 Belg rains so far and the anticipated below normal 2009 Meher forecast, this mission formed the opinion that 2009 would be similar to 2008. Therefore population in need of food assistance will be similar to the 6.4 million in 2008 for the period July to December 2009. The government-joint 2009 Belg seasonal assessment that commenced on 8th June is expected to come up with the proper estimate of the Belg rainfall impact on crop production and food security situation for the season.

4.3 Nutritional conditions

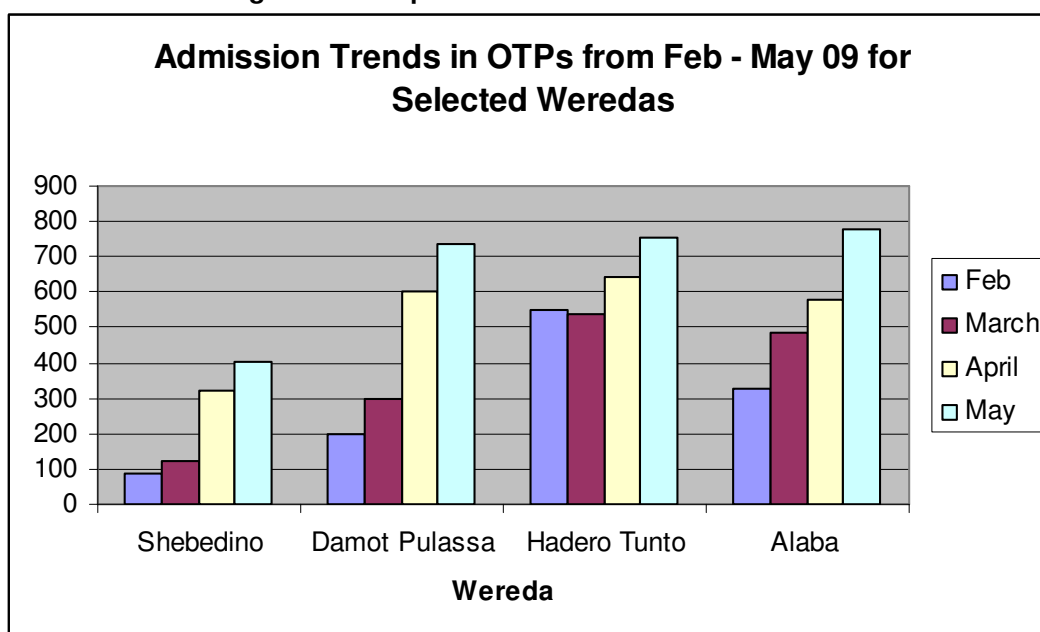
Most nutrition surveys in Ethiopia are not conducted for surveillance purposes rather as emergency surveys to ascertain a reported nutrition situation in order to facilitate/inform possible emergency response or as monitoring surveys following an intervention.

In December 2008 information available indicated that malnutrition had continued to decline. This was attributable to the Meher good harvests and various food security programs implemented by the government and its partners. Nonetheless high malnutrition rates continued to be reported in Southern zones of Somali, SNNP, Amhara and Oromiya regions. For example in Amhara the Global acute malnutrition (GAM) for June 2008 was 12.2 percent with Severe Acute malnutrition (SAM) of 0.5 percent compared to 14.4 percent GAM and 0.9 percent SAM in December 2008¹³.

Other WFP field reports and the Emergency Nutrition and Coordination Unit (ENCU) quarterly report for January to March 2009 indicate that admissions in Outpatient therapeutic and stabilisation centres have been on the increase in Oromiya, SNNP, Tigray, amhara, Somali and afar regions. For example the WFP May report from Awasa (SNNP) shows that admissions in OTPs run by the NGOs and the government was increasing from February to May as shown below:

¹³ WFP Ethiopia country food security update – 24 February 2009.

Figure 6. Ethiopia: Admissions trends for Awasa



Source: WFP field reports

Note: Damot Pullasa represents Welayta Maize and Roor Crop LZ, Shebedino represents Sidama Coffee LZ, Hadero Tunto represents Ginger, Coffee and Root Crop Livelihood Zone and Alaba represents Pepper Maize livelihood zone. Details of admissions for more woredas are in the annex.

4.4 Affected populations and food assistance requirements

Despite the steady improvements in production over the years an estimated 4.9 million persons will need emergency food assistance (from January to June 2009 with an estimated 592 000 tonnes of food aid). The populations in need of food assistance are spread through out the country. The most affected areas are Somali, Amhara, SNNP, Tigray and Afar regions (see table below)

Table 3. Ethiopia: Total affected population and food requirements by region (tonnes)

Regions	Beneficiaries	Cereal	Sup. Food	Oil	Pulses	Total
Tigray	674 304	101 146	10 620	3 034	10 115	124 915
Amhara	995 095	91 529	9 611	2 746	9 153	113 039
Afar	86 428	7 778	818	233	778	9 606
Oromiya	683 839	62 084	6 519	1 863	6 208	76 674
Somali	1 550 143	139 513	14 649	4 185	13 951	172 298
SNNP	881 739	70 251	7 376	2 107	7 025	86 759
Gambella	31 000	2 790	293	84	279	3 446
B. Gumuz		3 171	333	95	317	3 916
Harari	0	0	0	0	0	0
Dire Dawa	7 644	688	72	21	69	850
Total	4 945 425	478 950	50 290	14 368	47 895	591 503

Source: Joint Government and Humanitarian Partners Document – January 2009

4.5 Response to food insecurity

The government, through PSNP, is providing support to 7.5 million chronically food insecure people in identified woredas annually through provision of food and cash. The program is able to mobilise up to 20 percent more resources of the budget in the event that there is increased food insecurity in affected woredas. In 2008 as the country faced increased drought and high food prices the number of food insecure people increased drastically. In many instances households in the PSNP woredas preferred to receive food assistance as opposed to cash.

WFP has been involved in providing food assistance to people in Ethiopia through interventions that include assistance to drought and flood-affected households, malnourished children under the age of five and to pregnant and breast-feeding mothers, to school children, people affected by HIV/AIDS, refugees and communities working on land, soil and environmental rehabilitation activities. These activities are carried out in conjunction with the government, UN agencies and other NGOs operating in the country.

The government's Emergency Nutrition Coordination Unit (ENCU) has been working with WFP, UNICEF and other agencies identifying the hotspots woredas and malnourished populations that are given first priority in receiving food from the Government, WFP and other partners.

At the start of 2008 WFP had planned to provide food assistance to about one million people but this rose to 6.4 million by the end of the year. WFP delivered 370 000 metric tonnes to affected populations mainly in SNNP, Oromiya and Somali regions. Additionally WFP provided 154 000 tonnes to 4 million people under the PSNP (against planned 2.4 million) with 2-3 months food rations. For the targeted supplementary feeding, WFP was able to supply 44 000 tonnes for one million people. Overall WFP delivered assistance to more than 11 million people during the year.

Despite the achievements, WFP was faced with challenges of reduced resources at the time when more persons needed support. By July 2008, WFP was forced to reduce monthly rations by a third (cereals were reduced from 15 kg to 10 kg) and sometimes households did not receive other commodities like oil and pulses.

In order to improve delivery of food to the vast Somali region, WFP and the Government implemented the "Hubs and Spokes" way of delivering food to the region. In addition to Dire Dawa, hubs were established at Degahabur, Kebridehar and Gode. Local companies and convoys were used to move food from hubs along spokes to 186 final destination points within Somali region. From October to December 2008 WFP had dispatched approximately 44 000 tonnes of food to hubs and out of this 38 000 tonnes had reached final distribution points. The organization managed to reach more than 950 000 people. This was a major improvement compared to previous years.

Although there has been improvement in dispatching food to Somali region, at the time of compiling this report, WFP was finding it difficult to contract sufficient transport assets to move commodities from Djibouti to Ethiopia. Due to large fertilizer and wheat consignments in Djibouti, many transport companies were giving priority to transport Government fertiliser cargo resulting in shortages of trucks for WFP.

With the poor performance of 2009 Belg rains and the continued government's ban on bulk cereals purchases from the local markets for distribution in the country, local cereal procurement is not a possibility in the near future. Therefore, possibilities of pipeline break are eminent and the situation needs to be closely monitored to prevent escalation of food insecurity especially at the household level in affected areas.

4.6 Conclusions

- Ethiopia crop production is heavily dependent on rain fed agriculture thus failure of the rains impacts heavily on crop and livestock production.
- 2008 was a fifth consecutive good year Meher crop but a poor Belg impacts negatively on both Belg and Meher final crop production.
- Unexpected rains in November/December 2008 and January 2009 improved pasture, recharged water sources and led to improvement of the livestock but also caused some flooding in Gambela, lowlands of Oromiya and some parts of Somali region. Other aggravating factors like previous failed rains, restrictions, and poor terms of trade that led to excessive livestock sales and reduced herds will still affect livestock dependent populations.
- Insecurity in parts of Somali region is impacting on food security by restricting access to external markets for the livestock
- Although there was good production at national level, food insecurity still exists at the household level with 7.5 million persons under the PSNP support not showing signs of

reduction in the near future. An additional 4.9 million was identified to need food assistance from January to June.

- With the below normal performance of the 2009 Belg and the near normal to below normal Meher 2009 forecast it is anticipated that this figure may rise to 6.4 million for the period July to December 2009.
- Admissions to outpatient therapeutic and stabilisation centres have been on the upward trend especially in SNNP and Somali regions an indication of poor food access and intake, probably poor utilisation of food and other related causes like hygiene, water and health of affected populations.
- An estimated 200 000 people have been displaced in the southern parts of the country due to clan conflict¹⁴. This may have negative impact on the communities where IDPs are staying.

5. REFLECTIONS ON THE 2008/2009 CFSAM PROCESS AND RECOMMENDATIONS FOR FUTURE CFSAMS AND ASSOCIATED MEHER EFSAS

Coordination by the government and its partners improved during the planning and assessment of the humanitarian seasonal needs assessment. For the first time all teams assessed other humanitarian emergency needs as opposed to previously when teams concentrated on food needs only. Other non food needs assessed includes water and environmental sanitation, health and nutrition and in some cases education needs were also identified. There is need to train assessment teams on how to identify the humanitarian needs of communities.

All the regions, except Gambela and Beneshagul Gumuz used HEA to determine food needs. Regions compile reports that are sent to the federal government who review and further discuss before arriving at the final figures. Agencies interviewed expressed their dissatisfaction on the final stages of the humanitarian seasonal assessment. This was in regard to how the final figures are reached by the federal government without the agencies input. Once multi agency assessment teams and the regions submit reports to the federal government discussions are held between the regional and federal government in order to reach at the final figures of persons in need of food assistance. It is not clear why some regions figures are reduced while in others the figures are increased. See annex for more details on assessment figures.

5.1 Recommendations

The government has intervened by supporting the urban poor through the stabilization program. The rural poor who depend on crop and livestock production should continue to be supported with food assistance up to November 2009 when it is expected that the Meher green crops will start to be consumed and livestock condition may have improved (if Meher rains are normal).

The monitoring of food prices in affected areas should be continued and enhanced especially in Somali region.

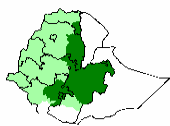



In view of the poor performance of Belg rains the government and agencies are encouraged to put in place contingency plans to address possible increased food assistance needs up to December 2009.

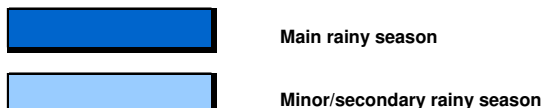
¹⁴ FEWS NET food security update May 2009

ANNEX 1

Ethiopia rainfall calendar

Normal Rainfall Calendar for Ethiopia

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Meher and belg crop dependent areas. Darker green areas are areas that produce belg crop while the rest produce meher crops only							Kiremt rains						
			Belg rains										
Afar and Northern Somali Region Pastoral Areas (Northeastern parts)								Karma in Afar/Karran in Somali					
				Sugum in Afar/Belg in northern Somali									
Southern Somali Region, neighboring lowlands of Oromia Region and southern parts of SNNPR					Gu in Somali Region/Ganna in Oromia								
											Deyr in Somali Region/Hageya in Oromia		
Sapie showers used for planting of sweet potato													



Source: FWS NET – Ethiopia

ANNEX 2

Regional summaries based on the seasonal assessments and populations in need of food assistance

Afar

This is an arid region located in the north-eastern part of Ethiopia and has an agro-ecology characterised by low erratic rainfall and high temperatures. According to CFSAM, 2008 was a good year in regard to rainfall amount and distribution. The situation led to improvement of pasture. Crop production in Afar is limited to growing of sorghum, maize, cotton and some pulses under irrigation. Some rain-fed teff and barley are also produced.

The karma rains started late, were erratic and ceased earlier than normal. The anticipated runoff from Tigray highlands that supports flood irrigation was not enough. In agro pastoral woredas of Abaala and Argoba crop loss was estimated at 85-100 percent as a result of low rainfall received. Herd sizes have been reduced by excessive livestock sales to meet food and non food needs.

The EOS/TSF& PSNP program is being carried out in all woredas of the zone. However, delay in supply & distribution of food stuffs remains a major bottle neck to the program. Food deliveries and distributions were reported to be behind schedule (even for the TFC)

The regional teams projected that 86 428 persons (in addition to the 472 279 under PSNP) would need food assistance.

Amhara

The region relies mainly on Meher crop but some eastern parts are Belg dependent. In the eastern zones, much of the area allotted for long-cycle crop planting had to be left fallow because of the failure of the 2008 Belg rains. Consequently, the area under the high-yielding maize and sorghum dropped sharply. This necessitated a major shift in the cropping pattern to short-cycle but low-yielding crops such as teff, maize, sorghum and pulses like chick peas and vetch later in the Meher season.

The overall weather during the Meher season in the western zones of the region was favourable for crop production despite shortages of rains experienced in a few lowland areas. The Meher rains came in time and their amount and distribution was good. However weather in the eastern zones was mixed but generally better than the 2007 year.

The most affected areas are; the eastern lowlands of Bati, Jile Timuga, Dewe Harewa and Artuma Fursi (Oromiya Zone); Argoba, Ambassel, Worebabo and Tehuledere (South Wello); Kobo, Habro, Gubalafto (North Wello); Ankober, Minjar Shenkora, Berehet, Kewot, Efratan Gidim and the Menz areas (North Shewa); Abergele, Ziquala and Sehala (Wag Himra).

Pasture and/or water shortages have already started to be felt in lowland parts of Argoba and Worebabo in South Wello; Berehet, Kewot and Minjar Shenkora woredas of North Shewa; and Ziquala, Abergele and Sehala woredas of Wag Himra; and Lasta woreda in North Wello. Unusual livestock migration was reported in these areas. Other affected areas are; who Tenta, Sayint Ajibar, Legambo, Mehal Tenta and Mekdela (South Wello); Delanta and Wadla (North Wello); and parts of Minjar Shenkora and the Menz areas (North Shewa) lost a considerable part of their livestock asset due to drought and related causes.

In 2008, the PSNP program targeted about 2.5 million chronically food insecure farmers in eight zones. Due to increased needs this was later augmented by a further additional cash allocated from the contingency fund. The seasonal humanitarian assessment estimated that 1 366 331 million would need food assistance in addition to those already under PSNP. However the final figure of people in need seems to have been adjusted downwards to 995 095.

Benshaqul Gumuz

The region relies on Meher crop production. The whole area experienced favourable weather conditions. There was some insecurity reported in 5 woredas during planting and weeding but this

affected crop production insignificantly. The seasonal assessment concluded that overall production was estimated at about 5.5 percent higher than that of 2007. In insecurity affected woredas of Asosa and Kamash the expected increase in production was 4.5-6.5 percent over that of 2007. However the impact of insurgent activity affected some households particularly high in Homosha, Belo Jiganfoye and Kurmuk woredas where estimated decline in production was estimated at 17 percent, 24 percent and 36 percent, respectively compared to of 2007.

The seasonal assessment projected that 35,232 persons from Asosa and Kemashi woredas would need food assistance from January/February to June 2009. This figure was maintained in the final seasonal assessment report.

Gambela

The whole region is dependent on Meher rains and is usually food secure. Rainfall was favourable however the country wide unexpected rains of October/November 2008 resulted in flooding of areas lying along Baro, Golo and Akobo rivers. These floods affected crops in Itang, Jikawo, Wentwa, Akobo, Lare and Gambela woredas. The floods also destroyed flood recession planted crops in Gog and Jor woredas. Land put to crop use increased by 20 percent compared to average of previous 5 years.

The recent 2008 Meher assessment estimated about 31,000 people mainly in Agnua, Nuer, Mezhenger zones and the Itang SP woreda who would require emergency food assistance in the coming year.

Oromiya

The region benefits from both Meher and Belg rains. Erratic 2008 Belg rains were received in Jimma and Arsi zones. East and West Hararghe zones were most affected by poor rains. Some flooding prompted replanting in East shewa.

Livestock deaths due to dry weather conditions were reported in Borena, Guji, Bale, lowlands of East Hararghe, West Hararghe, West Arsi and Arsi.

PSNP has planned to increase the beneficiaries under the program from 1 378 876 in 2008 to 1 438 134 (an increase of 59 258 people). The seasonal assessment estimated that 937 688 persons would need food assistance in addition to the planned PSNP beneficiaries. The final approved figures were reduced to 683 839 persons (a reduction of 253 849).

SNNP

The western parts receive Meher rains while the eastern parts are Belg dependent. Some eastern parts of the region benefit from sabbie showers that aid sweet potato planting. The 2008 Belg rains were poor but Meher rains were rated as good. The unexpected October rains affected teff and caused flooding in low lying areas of the region. Some hailstorms are reported to have reduced coffee yields. Meher crops production was expected to be better than 2007 crop due to good rains and increased acreage under production.

As a result of low coffee production, high grain prices, low livestock prices areas of sidama, Gedeo, south Omo and Guri special woreda were expected to face poor food security. Also in need of food assistance are areas that were affected by floods such as Shashogo in Hadiya.

In 2008 the PSNP beneficiaries were 1 298 981. The figure of planned beneficiaries for the 2009 is 1 459 160 (an increase of 160 179 persons). The regional assessment team projected that in addition to PSNP; 922 402 persons would need emergency food assistance. However the final report indicates that 881 739 persons would need food assistance from the region (a reduction of 40 663 persons).

Tigray

Tigray is located in the northern part of Ethiopia and neighbouring Afar region. The region is classified as a food deficit due to its semi arid and high population density. The southern 6 woredas produce Belg crops while the rest of the region depends on Meher rains.

The Belg rains were poor and as such there was failure of the Belg crop production. The Meher rains were received late and not sufficient to support crop production. The poor Belg and Meher reduced run off floods that is used to support farmers in the southern zones fertile plains of Alamata and Raya – Azebo (Mehoni) reducing planting in both woredas.

The final reported persons in need of food assistance were 674 304 in addition to the 2009 registered PSNP 2 519 829 beneficiaries.

Somali region

The region is inhabited by a nomadic population of nearly 3.5 million people who are highly dependent on livestock. The main rains in this region are received from April to June (Gu rains). Minor rains are from October to November/December (Deyr).

Overall the performance of 2008 Deyr rain in the seven deyr receiving zones of the region was good in comparison to previous years. But in Warder and Korahe Zones the amount of rain was insufficient. The Karan (July to September) rain in Jijiga and Shinille Zones was rated as poor resulting in bad crop performance, pasture and inadequate water for livestock consumption.

Pasture shortage is expected in the northern parts of Shinille including the entire Aysha woreda and north of Erer, Afdem and Shinile woredas. By January 2009 livestock was reported migrating from Shinile & Aysha to Guban of Somaliland. Pasture shortage was also reported in Jijiga zone (Babile, Jijiga and Harshin woredas). January to March is usually a dry period (jilal) for the region.

Majority of households in this region obtain most of their food (>80 percent) through purchases after selling livestock. Typically low supply of grains in the local markets and high price of cereals and imported food items affect food security of the inhabitants in many years. Due to poor body condition of livestock the price of marketable animals was low leading to low terms of trade.

PSNP is being piloted in a few woredas of the region. The joint assessment estimated that 1 673 403 persons would need food assistance from January to June 2009. The final approved beneficiaries were 1 550 143 (a reduction of 123 260 persons).

ANNEX 3

Estimated persons in need of food assistance by region
– figures presented as found – not analysed

Afar: Estimates of needy population and duration of assistance

Zone	Total HEA beneficiaries	Number of PSNP beneficiaries	Number of people needing assistance (HEA-PSNP)	Duration of assistance in months	Starting month
Zone 1	107 935	118 401	11 590	6	January
Zone 2	177 322	144 031	35 064	6	January
Zone 3	52 112	47 678	8 328	6	January
Zone 4	78 174	92 401	3 739	6	January
Zone 5	97 425	69 718	27 707	6	January
	512 968	472 229	86 428		

Amhara: Zonal level estimates of population requiring emergency food assistance in 2009

Zone	Relief food beneficiaries	Population requiring close monitoring	Duration of assistance
North Gondar	53 556	0	6
South Gondar	77 595	6 000	6
North Shewa	289 705	0	6
North Wello	216 230	0	6
South Wello	560 890	0	6
Oromiya	132 044	0	6
Wag Himra	36 309	0	8
East Gojjam	0	46 000	-
West Gojjam	0	0	-
Agew Awi	0	43 000	-
Total	1 366 331	95 000	

Benshagul Gumuz: Estimates of population requiring emergency food assistance in 2009

Zone	Pop needing emergency food assistance	Duration of assistance in months	Start month	Population requiring close monitoring
Asosa	25 460	7	January	24 164
Kemashi	97 72	6	February	10 671
Total	35 232			34 835

Gambela: Estimates of population requiring emergency food for year 2009

Zone	Population needing emergency food assistance	Population requiring close monitoring
Agnua	9 000	11 300
Nuer	20 000	14 700
Itang Sp woreda	2 000	3 000
Mezhenger	0	1 500
Total	31 000	30 500

Oromiya: Beneficiary number estimated by the assessment team using HEA methodology

Zone/ Region	Total HEA beneficiaries estimated in the Meher season assessment (1)	Number of registered PSNP beneficiaries (2)	HEA-PSNP Acute beneficiaries (3)	Emergency beneficiaries in pockets not covered by PSNP (4)	Total benefi- ciaries	Duration of assistance required in months	Starting Month
East Hararghe	713 514	478 540	291 865	-	291 865	6	February
West Hararghe	554 675	872588	204 470	-	204 470	6	February
Harari	-	-	0	-	0	-	-
Dire Dawa	60 258	52 614	7 644	-	7 644	6	February
Bale	196 325	196 992	60 700	8 000	68 700	6	January
Arsi	144 567	110 889	96 889	11 400	108 289	6	January
East Shewa	-	-	0	0	0	-	-
Borena	282 201	124 185	85 831	0	85 831	6	January
Guji	83 460	14 625	68 835	0	68 835	6	January
West Arsi	-	23 198	0	25 250	25 250	6	April
West Shewa	34 605	-	34 605	28 194	62 799	5 7	April February
North Shewa	17 266	23 552	7205	6 800	14 005	5 7	April February
Total	417 532	185 560	858 044	79 644	937 688		

Deyr/Karan 08 seasonal assessment results for Somali Region beneficiary number under the current situation

Zone	Woreda	Rural popn. in Woreda	Number of beneficiaries	%Beneficiaries
Shinile		392 312	186 277	47%
Jigjiga		762 950	271 124	36%
Gode		374 377	156 396	42%
Afder		524 774	261 430	50%
Liban		492 414	231 686	47%
Dagahbur		415 314	183 753	44%
Fik		313 871	127 520	41%
Wader		276 933	108 231	39%
Korah		264 992	117 066	44%
Special enumeration areas			29 920	
Regional total		3 817 937	1 673 403	44%

SNNPR: 2008 meher season assessment estimate of needy population duration of assistance by woreda

Zone	Total HEA beneficiaries estimated in the Meher season assessment(1)	Number of registered PSNP beneficiaries(2)	Emergency beneficiaries in pockets no covered by PSNP	HEA PSNP + Pockets(3)	Severity high: Below S Threshold	Duration assistance required in month
Alaba SW	-	38 611	1 394	1 394		6
Amaro SW	10 691	23 347	-	-		6
Basketo SW	-	-	-	-		6
Burji SW	34 604	27 482	12 000	19 122		6
Dawro	-	24 539	-	-		6
Dirashe SW	1 609	20 673	-	-		6
Gamo Gofa	18 221	245 470	-	-		6
Gedeo	283 478	48 959	-	234 519		6
Gurage	2 782	53 833	49 285	49 285		6
Hadiya	21 684	141 248	41 884	41 884		6
Konso SW	54 008	73 490	-	-		6
KT	43 969	101 725	-	11 475		6
Selti	1 979	58 665	1 857	1 857		6
Sidima	609 646	182 067	-	442 857		6
Siltie	45 601	25 632	11 684	42 759		6
South Omo	80 097	40 164	28 713	77 249		6
Welayita	53 529	332 917	-	-		6
Yem SW	-	-	-	-		6
TOTAL	1 261 897	1 438 822	146 827	922 402	-	

Pockets are defined as people not covered by PSNP

ANNEX 4

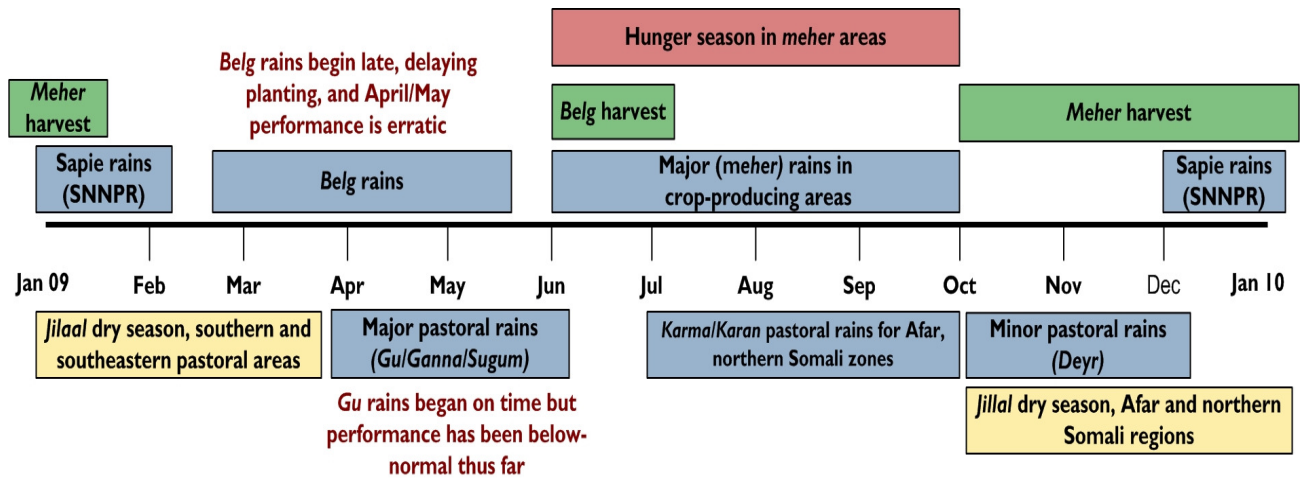
OTP Admission statistics (SNNPR February – May 2009)

Woreda	Responsible Agency	Admissions (February – May 2009)				Remark
		February	March	April	May	
Borricha	GOAL	84	100	277	397	
Shebedino	GOAL	89	121	320	401	
Wondogenet	Woreda Health	97	75	45	NA	
Dara	Action Faim	NA	NA	533	457	
Alaba S.W	Samaritan Purse	330	483	579	780	
Doyogena	Woreda Health	90	121	155	299	
Angacha	ICA	184	219	227	383	
Hadero-Tunto	Woreda Health	550	540	640	751	
Gomboro	Woreda Health	NA	NA	163	254	
Shashigo	Woreda Health	301	457	473	446	
Soro	Woreda Health	297	266	471	477	
Duna	Woreda Health	52	153	124	168	
Damot Pulasa	GOAL	200	297	604	735	
Bule	Samaritan Purse				138	
Yirgachafe	Samaritan Purse			503	269	
Gedeb	Samaritan Purse			275	125	
Kindo Koisha	Samaritan Purse				195	
Total						

Source: WFP May field report for Awasa

ANNEX 5

Seasonal calendar and update for the Belg rains as at May 2009



Source: FEWS NET – Ethiopia