S P E C I A L R E P O R T

FAO/WFP CROP AND FOOD SUPPLY ASSESSMENT MISSION TO ETHIOPIA

28 January 2005

Mission Highlights

- Cereal and pulse production from the 2004 *meher* season is forecast at 14.27 million tonnes, 24 percent above the previous year's revised estimates and 21 percent above the average of the previous five years.
- Extended rainfall, increased fertiliser use (up by 20 percent) and a 30 percent increase in use of improved seeds, especially maize and wheat, boosted average yields in key production areas.
- Despite the good harvest, some 2.2 million acutely food-insecure people will require emergency food assistance to meet minimum food requirements in 2005. This is in addition to 5 million chronically food-insecure people who will be receiving food and cash transfers under the new Productive Safety Net Programme which commences in 2005.
- Of particular concern are pastoralist areas in the east and south where prolonged drought has led to acute water and fodder shortages. Erratic and poorly distributed rains have also affected some central and northern parts of the country with concomitant effects on the yields of all crops.
- Emergency food aid requirements are estimated at about 387 500 tonnes. Targeted supplementary food distributions to 700 000 children under five and 300 000 pregnant and lactating women will require 89 000 tonnes of fortified blended food and vegetable oil.
- Timely marketing and transport of produce will be critical issues in 2005. Local purchase of food aid needs is recommended, as far as possible, to assist domestic markets.

1. OVERVIEW

An FAO/WFP Crop and Food Supply Assessment Mission visited Ethiopia from 8 November to 8 December 2004 to estimate the main *meher* season cereal and pulse production; review the final estimates of the 2003 *meher* and 2004 secondary *belg* season harvests; forecast the 2005 *belg* season production; assess the overall food supply situation; and estimate cereal import requirements, including food aid needs, for the 2005 marketing year (January/December). Accompanied by experts from the Federal Ministry of Agriculture and Rural Development (MoARD) and an EU observer, the Mission, in six teams, visited fifty zones and special *woredas* (districts), over a 20-day period, in all the grain producing regions. Parallel to the crop assessment teams but spread over a longer period, 23 teams, led by the Government's Disaster Prevention and Preparedness Commission (DPPC) and with members comprising WFP, bilateral donor agencies and NGO personnel, visited marginal localities and vulnerable zones and *woredas* to determine their current and prospective food security situation.

The assessment teams obtained planted area and yield data for all major food crops from *woreda,* zonal, and regional agricultural bureaux, which were cross-checked against information from farmers, traders, NGO and donor project staff and remote sensed data from early warning systems. Crop inspections, spot-check crop cutting, market surveys, livestock condition observations and transect recordings of crops and their conditions were conducted en route to audit the information received. Where necessary, yield forecasts were fine-tuned to take into consideration latest and broader information.

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WORLD FOOD PROGRAMME, ROME

The overall agricultural performance of the *meher* 2004 season is better than the previous year due to improved yields from a greater cultivated area in the main production zones. Despite generally poor *belg* rains in 2004 and a staggered start to the *meher* season throughout the country, more favourable conditions later in the year culminated in rains that continued until October/ November in many places. This has allowed farmers to take advantage of a better input supply and a migratory pest free year.

Good rainfall in the central highlands and in the western pastoral areas increased available forage and water, improved livestock condition, decreased mortality rates of young stock and removed the necessity for unseasonable and early migration of herds and flocks. However, pastoral areas in Somali Region and the southern zones of SNNPR and Oromiya have not had similar benefits until the recent rains and are reported to be subject to water and forage shortages with associated difficulties that need to be monitored carefully. In the north-east, where no late rains are expected, premature migration of livestock herds out of Afar is anticipated along the Afar-Amhara and South Tigray borders.

Overall, the Mission puts total *meher* cereal and pulse production at 14.27 million tonnes, about 24 percent above the previous year's MoARD post-harvest estimates and 21 percent above the average for the previous five years. With a predicted *belg* harvest of 250 000 tonnes in 2005, total domestic availability of cereal and pulses is estimated at 14.59 million tonnes. As a result, the country's cereal import requirement in 2005 is estimated at about 117 000 tonnes.

The grain price movement observed in 2004 followed a typical seasonal pattern of a steady month-on-month decline in grain prices soon after the start of the main *meher* harvest (September-January), then increasing thereafter during the pre-harvest months (July-September). As is generally the case, grain prices are expected to decline when cereal flows into the market peak toward mid January through February 2005. Continued and increased local purchase of cereals for food assistance needs, which averaged around 200 000 tonnes in the last four years, would provide some firmness to the grain market. There should also be scope for a significant build-up of stocks at all levels.

For the first time in the history of food aid appeals for Ethiopia, there is a difference in approach in addressing the needs of chronically food-insecure people and acutely food-insecure people. Some 2.2 million acutely food-insecure people will need emergency food assistance in Ethiopia during the year. In addition, some 683 000 people in Somali Region and 250 000 people in Afar Region, who will eventually be covered under the safety-net programme, will require emergency food assistance for the first half of 2005. Total emergency food needs in 2005 are, therefore, estimated at 387 500 tonnes (see Tables 13 and 14). The Productive Safety Net Programme (PSNP), a new food security programme, is aimed at tackling longer-term food security needs and is expected to eventually reach 5 million chronically food-insecure people in 2005 with cash and food transfers.

Thus while the total number of people targeted for assistance has not drastically changed from that of the previous year, the number that now fall under the category of emergency food needs is significantly reduced. Safety Net transfers for the pastoralist populations in Afar and Somali Regions are scheduled to start later in 2005, and the emergency programme will cover all food needs in the two regions for the first half of 2005.

Results of nutrition surveys conducted by the Government and NGOs in worst affected *woredas* throughout the country in 2004 indicated a national average Global Acute Malnutrition (GAM) of 9.6 percent and Severe Acute Malnutrition (SAM) of 0.9 percent. Since March 2004, targeted supplementary food has been distributed to malnourished children and pregnant and lactating women in SNNPR under the joint WFP/UNICEF/Government of Ethiopia Enhanced Outreach Strategy (EOS) for Child Survival Interventions (CSI). The programme is being extended to several other regions, and in 2005 is expected to target 6.8 million children aged 6 to 59 months in more than 320 drought-affected *woredas* (emergency and Safety Net *woredas*) of the country. It is estimated that around 700 000 malnourished children and 300 000 pregnant and lactating mothers will require supplementary feeding in 2005 under the EOS, with requirements for this programme being 89 000 tonnes of fortified blended food and vegetable oil.

2. SOCIO-ECONOMIC CONTEXT

2.1 Macroeconomic situation[1]

The Ethiopian economy is highly dependent on agriculture, which contributes to about 45 percent of GDP, followed by 43 percent from the service sector, and 12 percent from the industrial sector. Growth in GDP surged to 11.6 percent in 2003/04 after a negative growth of 3.8 percent in 2002/03 due to a severe drought. This recovery is mainly due to the rebound in agricultural production in 2003/04.

The momentum in the balance of payments surplus, which began in 2001/02, has continued in 2003/04 depicting a favourable development. Though lower than the US$ 278.1 million and US$ 302.4 million surplus recorded in 2001/02 and 2002/03, respectively, it registered a surplus of US$ 138.9 million. Therefore, compared to previous year, the surplus in the overall balance declined by 54.1 percent due to the huge trade deficit and the decline in official transfers despite the significant surge in net services and private transfers. Export earnings registered a 24.4 percent growth as its level reached US$ 600.7 million in 2003/04 while at the same time imports rose sharply by 39.4 percent in the same period to reach US$ 2 587.4 million.

In line with the observed 5.5 percent slowdown in official transfers and the widening of the trade balance deficit, the current account deficit worsened significantly from US$ 156.9 million in 2002/03 to US$ 495.8 million in 2003/04. The trade deficit has increased from US$ 1 373.7 million (20.7 percent of GDP) in 2002/03 to US$ 1 986.7 million (24.7 percent of GDP) in 2003/04. The increase in the trade deficit is mainly due to the significant surge in the international price of imported commodities (e.g. fuel and steel) and the ongoing capacity building activities of the country.

Ethiopia's capacity to import goods and non-factor services has improved to reach 5.1 months compared to 4.5 and 3.4 months of import in fiscal years 2002/03 and 2001/02, respectively. This improvement in the level of international reserves is mainly due to the build-up of the net foreign asset position of the National Bank of Ethiopia and the secured US$ 81.5 million exceptional financing in the form of debt relief. While this latter is very encouraging, looking at the absolute figure, this exceptional financing in the form of debt relief could barely compensate for the hike in the world prices of fertilizers and fuel products which led to a drastic jump in their respective import bills by up to 97.9 percent and 8.1 percent, respectively.

As of end-June 2004, the external debt stock of Ethiopia has shown a 6.2 percent increase compared to the previous year and stood at US$ 7200.3 million. However, the external debt measured in terms of its ratio to GDP or to exports of goods and non-factor services registered a decline in 2003/04 owing to the enhanced HIPC relief assistance. Indeed, while the external debt to GDP ratio went down from 101.9 percent in 2002/03 to 89.7 percent in 2003/04, the external debt servicing as a percent of exports of good and non-factor services has continued to decline from 14 percent in 2002/03 to 12.3 percent in 2003/04.

Reflecting the Government commitment to enhance the competitiveness of the export sector, the official exchange rate of the Birr continued to slightly depreciate. Indeed, the weighted average exchange rate data revealed that the value of the Birr against the US Dollar has shown a 0.45 percent annual depreciation to stand at US$1=Birr 8.61 in 2003/04 and US$1=Birr 8.58 in 2002/03 and US$1=Birr 8.54 in 2001/02.

Table 1 - Ethiopia: Key economic indicators, 2001-2004

	2001/02	2002/03	2003/04
Annual growth rate in real GDP (%)	1.2	-3.8	11.6
Total merchandise exports (US$ million)	452	483	601
Total merchandise imports (US$ million)	1 696	1 856	2 587
Total trade deficit (US$ million)	(1 243)	(1 374)	(1 987)
Overall Balance of payments (US$ million)	278	302	139
Int. Res. (months of imp. of next year)	3.4	4.5	5.1
Ext. debt servicing (% exports of G&S)	14.0	14.0	12.3
Average exchange rate	8.54	8.58	8.61

Source: National Bank of Ethiopia.
Note: Data cover year ended 30 June.

[1] The content of this section is based on variety of sources including the National Bank of Ethiopia Draft Annual Report, the Economic Intelligence Unit and UNDP Development Partnership in Ethiopia Reports.

Ethiopia's major agricultural export commodities are coffee, pulses, oil seeds and chat (Table 2). Other exports include sugar and molasses, leather and leather products, live animals, canned meat and frozen foods, fruits and vegetables, gold, etc. Export revenues in 2003/04 increased by 24.4 percent to US$ 600.7 million compared with earnings of US$ 482.7 million in 2002/03.

Table 2 - Ethiopia: Major commodity exports (2001-2004)

Commodity	2001/02	2002/03	2003/04
Coffee (US$ million)	163.2	165.2	223.6
Volume (000' tonnes)	110.3	126.1	159.7
Price (US$/kg)	1.48	1.31	1.4
Pulses (US$ million)	32.9	20.0	22.6
Volume (000' tonnes)	109.2	66.2	73.0
Price (US$/kg)	0.30	0.30	0.31
Oilseeds (US$ million)	32.6	46.1	82.7
Volume (000' tonnes)	76.6	83.0	106.0
Price (US$/kg)	0.43	0.56	0.78
Chat (US$ million)	49.0	58.0	88.1
Volume (000' tonnes)	9.4	6.0	5.0
Price (US$/kg)	5.23	9.6	17.6
Other exports (US$ million)	174.6	193.3	183.7
Total exports (US$ Million)	**452.3**	**482.7**	**600.7**

Source: Customs Authority, National Bank of Ethiopia, Coffee and Tea Authority.
Note: Data cover year ended 30 June.

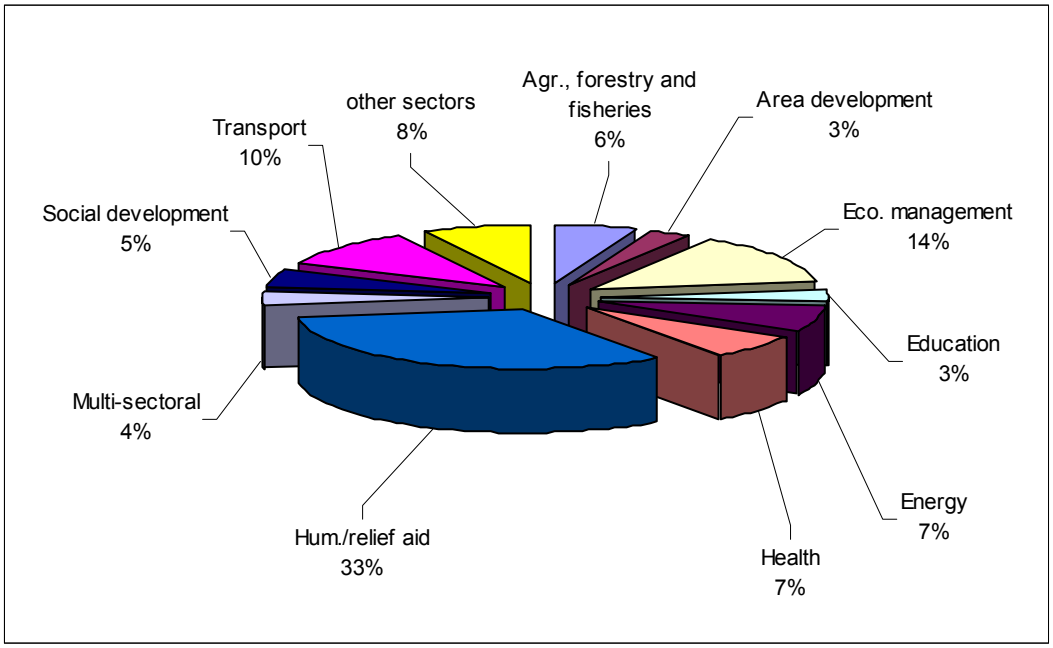
Coffee export earnings increased by 35.3 percent and stood at US$ 223.6 million in 2003/04 compared to the previous year, due mainly to the jump in the volume of coffee exported by 24.3 percent, registering a record high of 159.7 thousand tonnes and coupled with the mild recovery in world prices. The increase in the export earnings from pulses is due to the 10 percent pick-up increase in its volume exported in 2003/04 compared to the previous year.

The best-ever performance of oilseeds in 2003/04 is due to a rise in both the quantity exported (28 percent) and the commodity international price (39.2 percent). On the other hand, the improved performance of chat is solely accounted to the 79 percent hike in its unit price.

Total imports increased by 39.4 percent and 52.6 percent to US$ 2 587.4 million in 2003/04 from US$ 1 856.4 million in 2002/03 and US$ 1 695.7 million in 2001/02, respectively. The major import commodities in 2003/04 are semi-finished goods (US$ 435.3 million), fuel (US$ 310.6 million), capital goods (US$ 876.7 million), consumer goods (US$ 895.8 million) and miscellaneous goods (US$ 43.1 million).

While Official Development Assistance (ODA) trends for Ethiopia reflect a steady increase in magnitude from US$ 925 million in 2000 to about US$ 1 920 million in 2003, the humanitarian/relief component has consistently been the largest representing on average about the third of total ODA. In fact, in 2000 the humanitarian/relief aid consumed about half of total ODA and has been several multiples of that invested in other socio-economic sectors such as agriculture, forestry and fisheries, health and education in subsequent years. On average, about 33 percent of ODA funds are allocated annually for humanitarian assistance compared to 6 percent for agriculture, forestry and fisheries and 10 percent for transport infrastructure (Figure 1).

Figure 1 - ODA by selected sectors, average 2000-2004



2.2 Population

The population of Ethiopia for the mid-year 2005 is estimated at 73.044 million comprising 61.369 million rural (84 percent) and 11.675 million urban (16 percent), respectively. These estimates are based on the 1994 population and housing census of Ethiopia conducted by the Central Statistical Authority under the auspices of the Office of the Population and Housing Census Commission in 1994 and released in June 1998. The overall annual population growth rate is estimated at 2.78 percent.

Table 3 - Ethiopia: Total population size by region and by sex in 2004 (millions)

Region/Sex	Male	Female	Total
Urban	5.803	5.872	11.675
Rural	30.801	30.568	61.369
Total	**36.604**	**36.440**	**73.044**

Source: The 1994 Population and Housing Census of Ethiopia: Results at country level. Volume I: Statistical Report. Addis Ababa, June 1988.

2.3 Agricultural sector

Agriculture in Ethiopia is the main economic activity, contributing to about 45 percent of GDP with some 80 percent of the population earning a living directly or indirectly from agricultural activities. The agricultural sector is nearly totally dependent on rainfall with only 2 percent of the total arable land being irrigated. The proportion of area under improved seeds is less than 3 percent and the proportion of area treated with pesticides is less than 10 percent. This, coupled with low fertilizer use, susceptibility to pest and disease outbreaks and extensive highland soil erosion, has meant high variability in year-to-year agricultural production, which is predominantly in the hands of peasants working smallholdings[2]. This high variability in agricultural production increases food insecurity in the country.

The relatively low crop sub-sector productivity in Ethiopia is not only the result of the low adoption rate of the many yield enhancing technologies, but also the poor promotion and marketing schemes, Government policy in relation to tenure security and agricultural terms of trade. Indeed, volatility of prices of agricultural products has seriously constrained production and adversely affected farm income, particularly as prices collapse in periods of bumper harvest.

On the institutional side, the prevailing land tenure system in Ethiopia and the constraints over the issues of transferability of land rights do not encourage farmers to invest on land and water development and adopt

[2] According to CSA, the proportion of land under crops that was treated with chemical fertilizers in 2003/2004 represented about 40 percent.

expensive technological packages. This coupled with high population growth in the rural areas can only bring about disincentives to investment in the land and lead to inappropriate land management.

The livestock population in Ethiopia is estimated to be the largest in Africa and ninth in the world. However, this sub-sector is also characterized by a low-input system based on common grazing and the use of crop residues. According to CSA survey, almost 99 percent of the cattle, sheep and goat population in the country are indigenous. Basic production statistics regarding average birth rates and losses are not available. The current national production of milk from indigenous cattle is about 400 litres for a lactation period, whereas cross-breeds (which represent only 1 percent of the whole population) give over 3 000 litres during the same period.

2.3.1 Agricultural input credit

The Commercial Bank of Ethiopia (CBE) is the largest source of agricultural credit in the country. During the current cropping year (2004/05), CBE approved a total of 978 million Birr of agricultural input loans based on credit requests submitted by the regional governments - Oromiya, Amhara, SNNP, Tigray, and Addis Ababa. Table 4 presents the total agricultural input credit approved, disbursed, and overdue for the last five years.

Table 4 - Total agricultural input credit approved, disbursed and overdue (2000 to 2005)

Year	Amount approved (Birr '000)	Amount disbursed (Birr '000)	Amount disbursed (percent)	Amount overdue (Birr '000)	Amount overdue (percent)
2000/01	593 963	484 698	82	0	0
2001/02	641 924	459 050	72	32 038	7
2002/03	545 783	453 999	83	41 299	9
2003/04	780 690	376 410	48	59 496	16
2004/05	978 932	495 720	51	not yet due	n.a.
Total	**3 541 292**	**2 269 877**	**64**	**132 833**	**6**

Source: The Commercial Bank of Ethiopia, 2003.
Note: Data as of September 2004.

The amount of agricultural credit approved by CBE for the cropping year 2004/05 is about 25 percent higher than 2003/04 and the highest for the last five cropping years. The credit repayment default rate has been kept under control and it is expected that it will decline in the coming year given the good harvest prospects. Furthermore, the regional governments in their capacity as guarantors of agricultural input loans are implementing measures to reschedule part of the past due loans. The interest rate on these loans is 7.5 percent shared between the CBE which receives 5.25 percent on the disbursed amounts and regional governments which receive 2.25 percent for loan disbursement, recovery, and administrative charges.

3. FOOD PRODUCTION IN 2004

3.1 General

In Ethiopia, of the 11 million hectares presently farmed to all crops, only some 190 000 ha are irrigated; consequently, production varies considerably from year to year depending on the quality and quantity of the annual rains. The crops grown are diverse following the complicated mosaic of agro-ecologies derived from soil types ranging from vertisols to sand and cropping altitudes ranging from more than 3 000m to less than 600m above sea level. The main cereal staples include wheat, barley, teff, finger millet, maize and sorghum grown in varying proportions according to soils, altitude, and the prevailing climatic and market conditions of the year. Other carbohydrate sources include the stem of enset or false-banana, cassava, potatoes and sweet potatoes, all of which are found in either the middle altitude or highland areas of the south/central regions of the country. Cash crops include oilseeds, spices, coffee, chat and eucalyptus, the tree crops being found as hedgerows, on-farm woodlots and in forests in the middle altitude and highland areas.

Common grasslands provide extensive pasture and browse for livestock in most regions, but are particularly important to livestock producers in the eastern regions of Afar and Somali, the southern zones of Bale, Borena and South Omo, and in the western lowlands that reach from Gambella to Tigray. National livestock production from such pastoral areas, is augmented by the settled agro-pastoralism of peasant farmers throughout the Central Plateau and the escarpments of the Rift Valley, using common grazing, browse and crop residues to produce sheep, goats and less frequently, dairy cow products for sale and home use. Livestock are further integrated into the farms through the universal use of animal traction for ploughing, secondary cultivation, threshing, and the transportation of goods and commodities.

3.2 Rainfall 2004

Rain in Ethiopia falls in two distinct seasons: (i) the *belg*, a minor season that usually begins in January-February and ends in April-May; and (ii) the *meher* or *kiremt,* the main rainy season, which starts in June-July and ends in September-October. In some ten zones in central and northern parts of the country, *belg* rains are regularly enough to support the generally opportunistic *belg* harvest which may, in a good year, account for 5 percent of national cereal production. Elsewhere*, belg* rains offer the opportunity for land preparation and improve pasture and browse after the dry season. The melding of *belg* and *meher* rains in the south-west zones often generates one long season without clear-cut breaks, which although good for perennial crops and the long-maturing stover cereal varieties, is less than ideal for the early maturing grains.

In 2004, except for good rain in April the *belg* season was poor with hardly any rain in May being recorded across the country, which is reflected in the poor *belg* harvest given in Section 3.8 below.

Regarding the *meher* season, the six Mission teams dispatched throughout the country to determine agriculture production and conditions, collected qualitative and quantitative *meher* season rainfall data from all zones and *woredas* visited. The combined returns confirm the National Meteorological Institute's rainfall gauge data from 80 stations provided to the Mission that show that in most of the 53 zones and special *woredas* identified as Mission entry points, *meher* rains were considered to be as good or better than the previous year. In 40 Mission entry-points, the 2004 *meher* rains were considered to have been "normal," that is to say they conformed to the expected pattern, they began on time, they were reasonably evenly distributed during the season and they either finished on-time or later than expected. Only in 13 zones/special *woredas* were less than satisfactory reports filed. These reports included later starts and an erratic distribution with breaks of 10 to 20 days noted and early finishes. Such sites are located mostly in the south, with the worst examples being in South Omo, Konso, Borena and Gamo Gofa and in the east/north-east including *woredas* in East Tigray, adjacent *woredas* in a triangle between Central and South Tigray and Weghamra (Amhara) and in the Afar zones.

Despite the variable nature of the rainfall inherent in the semi-arid areas of Ethiopia, which means that in any zone and in any year there are always communities, particularly in the lowlands, that will experience a less than satisfactory rainfall, the 2004 *meher* rains may be characterised as being reasonably well-received. Except in SNNPR, where a 60 000ha shift to short cycle crops is noted, the timely start sustained the area sown to long cycle crops that had shown a dramatic increase in 2003, following the reduction in maize and sorghum cropping in 2002; supported germination and vegetative development of all cereals and pulses and provided adequate moisture at flowering and grain fill. The continuation of the rains into October and November encouraged late, opportunistic planting of short cycle crops and supported their development, adding a further positive aspect to the season. Rains in December that fell during the Mission have, at the time of reporting, had only positive effects. In Central Tigray, harvesting campaigns conducted as a precaution against possible storm-related losses, secured all vulnerable crops. Elsewhere in the north, the harvests of short-cycle crops were either completed or well- advanced at the time of the Mission, or, as in the cases of late planted sorghum in North-West Tigray and very late planted barley and pulses throughout Awi zone, crop production will only benefit from the continued precipitation.

Regarding the effect of rainfall on pasture and browse, the poor *belg* rain generally and the absence of rain in May in particular, reduced the availability of an early-bite compared to the previous year in most areas and raised concern for the well-being of livestock. However, the main season rains have been widely distributed and prolonged and, even if erratic in nature in some places, have increased forage production and improved water supply in all areas except the north-east. As the November/December rains in the south and south-east are reported to be benefiting the herders and grazers previously thought to be at risk in Somali, Borena and South Omo, only in the north- east are early pastoralist movements anticipated.

3.3 Area planted

Mission estimates for area planted are derived from several sources. The main source is area data collected by Bureau of Agriculture (BOA) Development Agents (DA) based at Peasants' Association (PA) level throughout the country. Such data are aggregated at *woreda* level, passed on to the agricultural desks at zonal level, where they are reviewed and transmitted to the Regional level offices.[3] In addition, the Mission teams collect data on area and production from farming companies, investors, and any state farms that are

[3] In Tigray, the zonal agricultural desks do not exist, data are transmitted directly from woreda level to regional level.

operational in the zones visited. These data are all included in the regional estimates shown in Table 5 below.

It should be noted that, in 2004, all the *Woreda* Agricultural Bureaux and, consequently the Zonal Agricultural Desks in Amhara Region have used forecasts issued by the Central Statistics Authority as a basis for their *meher* crop estimates rather than continuing with their own data collected time-series. This parallel data set resulting from the 2001 Agricultural Sample Census contains markedly different area estimates, which are not considered by the other major grain producing regions to describe either their agricultural areas or the proportional distribution of crops grown. In 2003 all but three Amhara zones opted to retain their own methods of assessment. The 2004 decision to base all returns in Amhara on CSA data reduces the previous year's comparator by 24 percent (716 000ha) with a concomitant effect on production data at regional level and area and production at national level. Presently, pilot studies are being conducted by CSA on the census data comparing, *inter alia,* the international unit value of various local land measures used by farmers and DAs to assess crop area. The EU observer to this Mission accompanying the team in Amhara undertook a pilot study to compare CSA/BOA land area estimates in six major production zones against remote-sensed data identifying potential agricultural areas in the *wurch, kola, weina-dega* and *dega* ecological zones, with a view to determine the closest fit. Initial findings from the two pilot studies point to a smaller than recognised value for the local land measures in one zone in Oromiya, and, by contrast, a closer match between BOA data and remote-sensed potential agricultural areas in the six zones in Amhara. Further studies of a similar nature are clearly required urgently to resolve the dichotomy.

For the time being, the Mission estimates are based on data collected from the BOA offices, which with the exception of Amhara, Addis Ababa and Afar regions where they are linked with CSA data sets, have been compiled by the system of aggregation the BOAs usually apply, as noted above.

Consequently, the Mission estimates that the national area planted to cereals and pulses during the 2004 *meher* season is 10.639 million hectares, which is 4 percent lower than the previous year's Mission estimate of 11 055 million ha but is 4 percent greater than the BOAs' adjusted post harvest estimates for 2003. Similarly derived estimates for 2004 *belg* season suggest that in 2004's *meher* planting follows a 6 percent reduction in *belg* planting. The increased *meher* area is, therefore, explained by increased *meher* use of the *belg* area as well as Mission noted (i) expansion of commercial farms in the western zones, (ii) the resettler programme and (iii) an increased use of fallow land in Oromiya.

Closer examination of major cereal areas at national level reveals that maize and sorghum areas have been sustained at the levels achieved in 2003. However, these data mask return to lower maize and sorghum areas in SNNPR due to a 54 000 ha (13 percent) and 27 000 ha (21 percent) reductions, respectively. At national level, this drop is compensated by numerically similar area increases in maize and sorghum planting in Oromiya and Amhara. At the same time, teff, wheat and barley and the total pulse crops register a 76 000 ha increase in SNNPR, sustaining the level of land use. National area increases in teff (5 percent), wheat (7 percent), barley (5 percent) and pulses (11percent) confirm the anticipated, greater interest in late-planted, short-maturing grain crops in 2004, due to the shortage of rain in May. In the SNNPR where maize is grown, most farm families eat enset, therefore, despite fairly similar farm sizes to the peasant farms in Oromiya, the remarkably high level of carbohydrate production from well-established enset gardens at around a minimum of 130 tonnes fresh weight to the hectare, releases the maize crop for sale. Maize has also the advantage of an early, green- cob market that provides a lucrative income when early rains are favourable. As an effective cash crop, financial returns from maize influence planting decisions more strongly than where maize is needed mostly for subsistence. In such areas teff and selected pulses provide cash crop substitutes for maize, being agro-ecologically interchangeable and having a firmer recent price history; the data from SNNPR suggest that such a shift occurred in 2004.

Countrywide, given the sustained levels of cultivation achieved in 2003, there does not appear to have been any widespread constraints on ploughing capability. However, in the wetter, forested areas, where the risk and effects of trypanosomiasis are high and the small size of the farms precludes the effective use of the normal four- wheeled tractors but where timeliness of cultivation, sowing, and weeding is of paramount importance for the production of a satisfactory series of crops to achieve food security, the general lack of alternative power sources to oxen, points towards the need to consider the introduction of the diesel engine, two-wheeled, hand-tractor to improve the efficiency of husbandry practices and place less stress on the natural resources used to maintain the oxen.

Following the 2003 good harvest, seed supply was not a constraint on 2004's *meher* planting. Given that some 680 000 tonnes of seed grains were estimated to have been used in 2004, most seed sown came from

farmer carried-over stocks from the previous year, however, returns from the National Agricultural Input Suppliers' Association show that in 2004 improved seed sales increased by 32 percent to 21 000 tonnes from the previous year's final estimate of 15 700 tonnes.

3.4 Factors affecting yields

The national yield averages compare favourably with averages estimated over the past five years reflecting a similar or an improved performance of crops in almost all regions except for regional cereal yields in Tigray and Addis Ababa; and regional pulse yields in SNNPR. Presently, under the prevailing BOA system, woreda specialists assess yields at pre-harvest and post-harvest stages for all field crops. Such data are then transferred to the zonal or regional desks for review, analysis and onward passage. Because of the timing of the exercise, the Mission teams usually only receive the earlier yield assessments, which are then adjusted during the Mission with the assistance of the key informants, to take into account field observations, measurements and any changing conditions regarding the weather and late pest and disease challenges. All teams used the Pictorial Evaluation Tool (PET), developed by the Centre for Arid Zone Studies, University of Wales, Bangor, UK, in 2004 to good effect to add more consistency to the auditing approach adopted. Such assessments are subject to rigorous review when the Mission teams return to base. At this stage, assessed performance is reviewed in respect of seed type, timing of sowing, extent and timing of fertiliser use, the season's pest and disease profile, the performance of similar crops in neighbouring localities, time-series data and compared with any other independent assessments available for the zone.

In 2004, 97 percent of the seeds used were local seeds carried over from the previous harvest. In the surplus areas, such seeds are mostly open-pollinated releases from government seed agencies that have stabilised over the last two decades and have acquired local identities reflecting their provenance (in Ofla, South Tigray the Global 2000 programme wheat releases, locally called *sekokwa*, are noted by the Mission to be producing 3.2 tonnes/ha under prevailing peasant conditions*)*. In the more marginal areas, as well as such seeds, local landraces are also in evidence and are exchanged/sold between farm families as needed. In 2004, seed assistance programmes were virtually absent being restricted to a few emergency programmes in response to localised problems. Of the remaining 3 percent, amounting to the 21 000 t of improved seed sold, 5 000 t were maize seeds and 14 000 t were wheat seeds. It is anticipated, therefore, that 12 percent of the maize and 8 percent of the wheat sown in 2004 will have been newly purchased improved varieties, sustaining the levels of introduced varieties noted the previous year. Regarding maize, given the low seed rates, the propensity for farmers to carry over seeds from year to year and the fact that that most seeds released are open-pollinated varieties that will produce at the expected level for several generations, if the present levels of sales are sustained it is possible that the maize population, in the serious maize growing areas, will be completely upgraded within another four years or even sooner given the likelihood of farmer to farmer exchanges. Under reasonable environmental conditions and provided that fertilisers are used maize production should increase by 600 000 tonnes per year (200 000 ha @ 3 tonne per ha increment) through seed change alone. Coincidentally, in 2004 production is estimated by the Mission to have increased by 586 000 tonnes but this also includes better estimates of performance in zones where no improved seeds have been released.

A similar, if slower, progression is to be expected with the wheat crop. Sales of 14 000 tonnes of improved wheat seed connect to a possible production increment of 225 000 tonnes from 112 000 ha or 7 percent of the wheat area. In 2004 Mission estimates suggest a production increment of 568 000 tonnes again including better estimates of performance from all zones, with or without improved seed sales.

Given the favourable rainfall, no widespread replanting was necessary, and the continuation of the rainfall meant that where replanting did occur, the rains supported the growth and development of the replacement crop as well as the main crops in most areas, reinforcing the role of rainfall as the single most important determinant regarding crop performance in Ethiopia.

Reversing the trend noted by the Mission in the past three reports, fertiliser use as indicated by cash and credit sales, increased by around 19 percent to 323 000 tonnes and is higher than in any year since 1996 despite significant increases in prices of DAP (diammonium phosphate) and urea that have raised DAP prices to c.365 Birr per quintal (US$ 420/tonne) and urea prices to 280 birr per quintal (US$ 320/tonne). These current prices connect to FOB prices for DAP at around US$ 200 per tonne are now around twice the retail price of compound/nitrogenous fertilisers sold to farmers in the UK. Nevertheless, demand appears to have matched supply, except in Illubabor where supplies arrived late and use dropped by 11 percent; and in Tigray where unfavourable rains reduced use in the North West, Central and East zones. Notwithstanding the foregoing, fertiliser distribution to the regions was similar in proportion to the distribution in *meher* season

the previous year. Tigray received the lowest share at 2.7 percent (5 percent in 2003); Amhara received 31 percent (29 percent); Oromiya received 46 percent (44 percent); SNNPR received 10 percent (8 percent) and the remainder being 10 percent (13 percent in 2003), was sold to farmers in the remaining regions and to various commercial enterprises. Zonal distribution patterns are more informative and indicate a return to recommended levels of use in the Oromiya wheat growing zones of Arsi, NW and SW Shewa where increases in use of 54 percent and 30 percent are noted; and in the maize and teff growing zones of East and West Gojam, where similar increases occurred.

Regarding pests and diseases, the only migratory pest scares noted by the Mission teams were outbreaks of migratory quelea birds that were controlled by aerial spraying in the four zones, Oromiya, North Shewa, Borena and East Hararghe and Konso special woreda, where they made an appearance.

Non-migratory pests are noted to have been of little significance in 2004, nevertheless, they included infestations of sorghum chafers in East Tigray, the eastern zones of Amhara bordering Afar Region; stalk borers, termites, boll-worms, and birds, the control of which through bird-scaring continues to place a great and underestimated demand on household labour, particularly in sorghum growing areas, if heavy losses are to be avoided.

Storage pests, especially weevils, are noted to be, as usual, as a cause for concern throughout the country but they are particularly important in the wetter south- western zones, where stored maize losses are noted to be as high as 40 percent in good rainfall years. In 2004 an increased use of storage chemicals was reported, however, no sales figures were available to confirm its improved availability. The increased production of maize (20 percent) and pulses (59 percent) suggests that annual grain storage losses will be higher in marketing year 2005 than during 2004 and have been proportionally calculated for use in the grain balance sheet to be 11.5 percent.

The adverse effects of crop diseases were also mild, with only yellow rust on wheat in Arsi and smut on sorghum in East Hararghe and Somali reported as causes for concern. The presence of sorghum smut was also identified by Mission teams in the fields of South Wollo and South Tigray, but was seen to be of very little concern to the farmers whose fields were infested. Local seed treatment is carried out using cows' urine in some of the other localities visited in the same zones and in West Tigray, where the disease is also present. It is noted that in the sorghum growing areas of Sudan bordering the expanding mechanised farming units in the western lowlands of Tigray and Amhara, treatment of sorghum seed against smut with proprietary brand seed dressings is almost universally practised by the commercial farmers.

Weed competition was again fierce in 2004, as the good distribution of rain generally enhanced all plant growth. The Mission teams noted an increase in frequency of hand-weeding of most crops in all regions, and more reports of "*shillshallo*" or animal- powered thinning of maize and sorghum crops, followed by inter-row cultivation, were evident in 2004. There was also an apparent increase in the use of herbicides. The Mission notes the use of 2.4 D by farmers as diverse as investors in West Tigray, (where labour rates were noted above the previous year's 30 Birr per day for workers harvesting sesame under piece work contracts), wheat farmers in Arsi and Bale, teff farmers in Jimma and mixed cereal farmers in East Gojam, the common elements linking their choice being the vigorous growth of weeds and a shortage of labour.

The combination of the positive factors noted above and the well-distributed rainfall described previously, explains the overall improvement in crop performance in all the main production regions except Tigray as manifested by the universal increase in yields compared to the previous year for cereal and pulses listed in Table 5 below. These are considered by the Mission to be due to (i) the direct effects of well-distributed rainfall on crop growth and development, (ii) timely pre-season cultivation and main season husbandry, (iii) increased investment in inputs due to improved availability of fertilisers, improved seeds and credit, (iv) better financial returns to cereal growers the previous year.

3.5 Other crops

Crops contributing to household food security vary from north to south and from east to west. In the north, oilseeds, particularly *nuq* and sesame, are important to both peasant farmers and commercial producers. In 2004 national oil seed area increased by 38 percent or 230 000 ha of which 135 000 ha is noted to be increased sesame area in Amhara and Tigray, the remaining increment coming from expanded crop area in West and East Wellega in Oromiya region.

Given the diverse nature and generally favourable conditions for plant growth of the southern half of the country, a greater range of other crops contribute to the household's economy. In SNNPR and the southern zones of Oromiya, crops other than cereals and pulses occupy 12 percent and 32 percent respectively of the planted area compared to 3 percent and 7 percent in Amhara and Tigray. Of these the importance of enset, which provides the main carbohydrate staple for some 8+ million people and makes a substantial contribution to the diet of an additional 4 million people, is well understood. Data from southern zones are incomplete in 2004, however the Mission teams in the enset area noted no reasons to suppose that enset harvesting is not in balance with replanting, suggesting that the area noted the previous year will have been sustained. Enset condition is noted to be good with yields at normal levels. Annual roots and tubers, mostly in the same agro-ecological zones as enset, have also performed well during the *meher* season, with sweet potato and potato yields of 15t-30t/ha as recorded by Mission team members, during a separate study in 2003 being achieved, in 2004.

Coffee production in 2004 is expected to be similar to the previous year, according to the Coffee and Tea Authority specialists interviewed by Mission teams. Growing conditions during the year were good in all zones. Coffee berry disease remains a serious problem except where trees have been replaced by resistant varieties through GOE supported nursery programmes.

Production from the other industrial field crops such as tea, sugarcane and cotton and the performance of chat, a mild narcotic cash crop grown throughout the southern half of the country in small backyard plots, are reported to be similar to the previous year.

3.6 Livestock

Ethiopia has the largest livestock inventories in Africa, including more than 38 million cattle, 30 million small ruminants, <1 million camels and 4.5 million equines and 40 million chickens (CSA, 2004), with livestock ownership currently contributing to the livelihoods of an estimated 80 percent of the rural population. In the arid and semi-arid extensive grazing areas in the eastern, western and southern lowlands cattle, sheep, goats, and camels are managed in migratory pastoral production systems. In the highlands, livestock are kept under settled or transhumant systems utilising common pastures, many of which have a high clover content and crop residues. Such livestock includes some 9.3 million oxen providing draught power, for the mixed farming system that prevails.

Recovery from the 2002 drought, which reportedly reduced livestock numbers in some parts of the pastoralist areas, notably Afar, by nearly 50 percent, has been set back in the same areas in 2004 due to meagre rainfall and until the recent rains, conditions have been cause for concern in the southern pastoral areas of the country. Elsewhere, improving pasture and reasonable availability of drinking water has resulted in enhancing livestock body condition in the central highlands and western zones to the good body condition scores of 3-4 noticed the previous year with the notable exceptions of Meket, (North Wollo), Mehoni (South Tigray) and associated *tabia* bordering Afar Region

No unusual disease outbreaks have been noted except concerns about internal/external parasites and reports of endemic infectious diseases such as pasteurellosis, anthrax, blackleg, CBPP, and CCPP. Trypanosomiasis is routinely cited as a concern in western and southern lowlands, but the condition is not reflected in the observed body condition scores in 2004. In several zones, farmer and BOA sources indicated shortages of vaccines and other veterinary pharmaceuticals at local levels, where decentralisation has lead to difficulties in ensuring ready supplies of prophylactic and curative medicines.

Mission teams report no early migration of pastoralists due to water shortages and poor pastures inducing premature livestock movements. However, reports of imminent movement from Afar to the neighbouring zones of Oromiya, South Wollo and South Tigray reached the Mission on arrival in Addis Ababa. In southern Borena, Hararghe while good November/ December rains have been reported, pasture growth and browse remain fragile and heavily dependent on rainfall in the coming months.

In Afar, in South Omo and in two zones in Somali livestock prices are falling as pastoralists sell to reduce numbers to carry during the dry season on the limited forage. Elsewhere, throughout the country livestock prices are firm and rising, boosted by firm cereal prices in the central plateau and the west and the opening of meat processing units in the east.

Regarding the use of feed grains, information is scarce. On the one hand, the modern poultry industry producing eggs and broilers is served by private feed mills generating some 80 000 tonnes of poultry feed

per annum to accommodate an estimated 1.5 million layers and 1 600 tonnes of broiler meat produced annually. About 70 percent of the components of the rations are estimated to be home-grown cereals. Feed grain use in the traditional backyard poultry industry, on the other hand, is far less easily assessed. Given that the backyard chicken population has recently been estimated by MOA at 56 million birds (7million households, 8 birds per household) and by the CSA at 38 million birds, assuming that every household feeds one menelik/wollo (0.7 kg) of home-produced cereals to the birds once a week, then the feed use is in the order of 254 000 tonnes per year. Mission observations suggest that both the grain ration and frequency of feeding are usually greater than assumed above. Therefore, the traditional and modern poultry industries may consume around 330 000 tonnes of cereals per year. In addition to chickens, cereal – based feeds are also given in limited quantities to working equines, draught oxen at ploughing time, fattening stock for the elite markets and 156 000 grade and pure bred dairy cows. Again, information on rations and frequency of feeding, outside the small modern sector is scanty, however, whereas it is understood that the bulk of the supplementary rations for large ruminants rations comes from household waste and cereal by-products, brans, mill-sweepings, brewers' grains, and oil-seed cakes, at household level home-grown cereals are also fed directly to livestock as cut sheaves and as grain. Consequently, a further 70 000 tonnes per annum has been added by the Mission to animal feed use in the cereal balance sheet, to cover such eventualities this coming year when grains will be more freely available.

3.7 Cereal and pulse production forecast

The CFSAM teams' visits coincided with all stages of the harvest from crop cutting to threshing depending on crop and location. The wide range of harvesting activities underway at the time of the Mission enabled a ready assessment of actual production per unit area to be observed by the teams. Where crops were still standing, samples were taken, threshed using local techniques, and weighed to crosscheck agricultural bureaux yield estimates and farmers' predictions of production. Where harvesting was over, quantities of stored grains or cobs were matched against the areas from whence they came; and where threshing or combining of fields had been accomplished, information was obtained directly from the harvesting contractors, regarding the median yields in their areas of operation. In such ways, additional information was obtained to make adjustments to estimates and predictions received and to counter-balance glaring inconsistencies and false declarations or to supply figures for missing data. Transects driven by the Mission teams moving from location to location enabled observers to take detailed records of crop conditions, standardised using PET.[4]

Regional totals of area and production, prepared by the Mission, are presented in Table 5 by crop. They indicate a 2004 *meher* cereal harvest of 13 million tonnes from 9.23 million hectares. This is 3 percent higher than 2003's post harvest estimate corrected for the switch to CSA data in Amhara and 10 percent higher than the CFSAM estimate. Pulses return at 1.26 million tonnes from 1.41 million hectares, a harvest that is 59 percent better than 2003's corrected post harvest estimate and identical to the previous year's CFSAM figure. Time series data for the past five years are provided in Table 6 for comparison purposes. They show that 2004's production estimate for cereals and pulses is the highest that has been achieved to date. Its validity hinges on the accuracy of the area and yield estimates prepared by the BOA offices. The differing area estimates described earlier generate doubt in the minds of assessors, who may then opt for lower yield estimates to redress possible overestimated areas, therefore, the sooner the area differences can be practically identified and resolved at *woreda* or PA level the better. In 2004 the formalised approach to transect-based field recording and crop cutting by all Mission teams resulted in "spot- check" yield estimates that are significantly higher than the zonal averages, particularly in the drier zones, where many of the low average yield estimates of 2-3 quintals are thought to be highly unlikely and connect to the absence of training in crop assessment and the availability of suitable equipment viz. manuals, accurate balances and quadrats, at *woreda* level. This points to the need for a programme to address these issues as soon as possible, coupled with technical support from zonal and regional specialists to help BOA staff at local levels to resist local pressures to underestimate production to sustain the flow of food aid.

[4] Robinson, I. Stirling, C. Hunde, M. and Bradbury, H. (2004) PET-Cereals, A Pictorial Evaluation Tool for Crop Harvest Assessment in Ethiopia, CAZS, University of Wales, Bangor, UK.

Table 5 - Ethiopia: Area ('000 ha), production ('000 tonnes) and yield (tonnes/ha) of cereals and pulses in 2004/05 *Meher* season

Region	Item	Teff	Wheat	Barley	Maize	Sorghum	Finger Millet	Others	Total Cereals	Total Pulses	Cereals and Pulses
Tigray	Area	148.5	78.2	84.2	70.1	197.0	100.8	50.0	728.8	71.0	799.8
	Yield	0.5	0.8	0.7	1.3	1.1	0.6	0.6	0.8	0.5	0.8
	Production	76.9	64.7	58.5	90.9	213.7	63.4	28.1	596.2	36.7	632.9
Afar	Area	6.0	0.0	2.5	9.5	3.2	0.0	0.0	21.2	0.3	21.5
	Yield	0.8	0.0	0.4	2.5	1.0	0.0	0.0	1.5	1.0	1.5
	Production	4.9	0.0	1.1	23.6	3.1	0.0	0.0	32.7	0.3	33.0
Amhara	Area	787.0	350.0	280.0	287.0	410.0	165.0	28.5	2 307.5	468.0	2 775.5
	Yield	1.0	1.6	1.3	2.5	1.5	1.4	2.4	1.5	1.0	1.4
	Production	787.0	576.0	365.0	718.0	620.0	231.0	68.4	3 365.4	474.0	3 839.4
Oromiya	Area	1 245.0	1 058.0	628.0	972.0	717.0	122.0	15.0	4 757.0	606.0	5 363.0
	Yield	0.9	2.0	1.6	1.9	1.5	0.9	0.6	1.5	0.9	1.5
	Production	1 111.0	2 112.0	1 001.0	1 873.0	1 059.0	114.0	9.0	7 279.0	564.0	7 843.0
Somali	Area	0.0	6.5	5.3	95.0	86.0	0.0	0.0	192.8	8.8	201.6
	Yield	0.0	0.6	0.5	0.5	0.7	0.0	0.0	0.6	0.6	0.6
	Production	0.0	3.8	2.6	47.0	60.8	0.0	0.0	114.2	5.5	119.7
Beneshangul Gumuz	Area	19.9	2.9	1.2	34.1	52.5	22.4	0.3	133.3	12.6	145.9
	Yield	0.6	1.0	0.9	1.6	1.3	1.0	1.0	1.2	0.5	1.1
	Production	11.8	2.9	1.1	55.2	66.7	22.4	0.3	160.4	6.8	167.2
SNNPR	Area	238.4	198.1	129.4	376.7	100.1	7.6	0.9	1 051.2	238.0	1 289.2
	Yield	0.7	1.6	1.1	1.7	1.2	0.9	0.6	1.3	0.7	1.2
	Production	171.6	324.5	146.3	646.7	117.1	7.1	0.5	1 413.8	170.8	1 584.6
Gambella	Area	0.0	0.0	0.0	6.3	3.1	0.2	0.0	9.6	1.0	10.6
	Yield	0.0	0.0	0.0	1.4	1.4	0.9	0.0	1.4	1.0	1.3
	Production	0.0	0.0	0.0	8.5	4.5	0.2	0.0	13.2	1.0	14.2
Harari	Area	0.0	0.8	0.0	2.4	6.7	0.0	0.0	9.9	0.0	9.9
	Yield	0.0	0.8	0.0	0.7	1.0	0.0	0.0	1.0	0.0	1.0
	Production	0.0	0.6	0.0	1.7	6.7	0.0	0.0	9.0	0.0	9.0
Addis Ababa	Area	4.4	3.9	0.2	0.0	0.0	0.0	0.0	8.5	1.9	10.4
	Yield	1.2	2.0	1.0	0.0	0.0	0.0	0.0	1.6	1.0	1.4
	Production	5.5	7.8	0.2	0.0	0.0	0.0	0.0	13.5	1.9	15.4
Dire Dawa	Area	0.0	0.0	0.0	12.0	0.0	0.0	0.0	12.0	0.0	12.0
	Yield	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.8	0.0	0.8
	Production	0.0	0.0	0.0	9.6	0.0	0.0	0.0	9.6	0.0	9.6
TOTAL	**Area**	**2 449**	**1 698**	**1 130**	**1 865**	**1 576**	**418**	**95.0**	**9 231**	**1 408**	**10 640**
	Yield	**0.9**	**1.8**	**1.4**	**1.9**	**1.4**	**1.0**	**1.8**	**1.4**	**0.9**	**1.3**
	Production	**2 169**	**3 092**	**1 576**	**3 474**	**2 152**	**438**	**106**	**13 007**	**1 261**	**14 268**

Table 6 - Ethiopia: Cereals and pulses production, comparison of 1999/00 to 2004/05 *Meher* seasons

Region	Meher season	Cereals		Pulses		Cereals and Pulses	
		Area	Production	Area	Production	Area	Production
		('000 ha)	('000 tonnes)	('000 ha)	('000 tonnes)	('000 ha)	('000 tonnes)
Tigray	2000/01	827.	668	50.5	25.2	878	693
	2001/02	723	637	47.3	24.6	770	662
	2002/03	692	427	41.8	14.2	733	442
	2003/04	761	677	52.5	28.0	814	705
	2004/5	729	596	71.0	36.7	800	633
Afar	2000/01	11.1	8.8	1.3	0.6	12.4	9.4
	2001/02	10.5	8.3	1.3	0.6	11.8	8.9
	2002/03	8.5	4.6	1.0	0.1	9.5	4.7
	2003/04	12.8	12.8	0.2	0.8	13.0	13.8
	2004/05	21.2	32.6	0.3	0.3	21.5	32.9
Amhara	2000/01	3 302	3 792	656	428	3 957	4 220
	2001/02	3 307	3 546	656	424	3 962	3 970
	2002/03	3 212	2 760	683	361	3 895	3 121
	2003/04	2 276	2 705	460	216	2 736	2 921
	2004/05	2 307	3 365	468	474	2 775	3 839
Oromiya	2000/01	4 310	5 668	583	413	4 892	6 081
	2001/02	4 419	5 326	608	416	5 026	5 742
	2002/03	4 275	3 804	610	287	4 885	4 090
	2003/04	4 395	5 579	541	391	4 937	5 970
	2004/05	4 757	7 279	606	564	5 363	7 843
Somali	2000/01	73.4	41.1	2.7	1.0	76.1	42.1
	2001/02	97.3	36.6	0.0	0.0	97.3	36.6
	2002/03	98.9	47.9	0.0	0.0	98.9	47.9
	2003/04	210	61	6.5	2.0	217	63
	2004/05	193	114	8.8	5.5	202	120
Benshangul Gumuz	2000/01	145	114	15.0	10.0	160	124
	2001/02	137	118	10.9	7.0	148	124
	2002/03	135	111	8.1	5.0	143	116
	2003/04	142	165	14.3	9.6	156	175
	2004/05	133	160	12.6	6.8	146	167
SNNP	2000/01	1 104	1 450	194	138	1 298	1 588
	2001/02	1 104	1 246	177	129	1 281	1 376
	2002/03	1 041	973	170	98	1 211	1 071
	2003/04	1 194	1 453	192	143	1 386	1 595
	20004/5	1 052	1 414	238	171	1 289	1 585
Gambella	2000/01	15.4	17.1	1.0	0.9	16.4	18.0
	2001/02	18.1	21.0	1.1	1.5	19.2	22.6
	2002/03	14.5	12.3	1.0	1.3	15.4	13.6
	2003/04	15.6	17.6	0.9	1.2	16.5	18.8
	2004/05	9,6	13.2	1.0	1.0	10.6	14.2
Harari	2000/01	9.2	5.0	0.0	0.0	9.2	5.0
	2001/02	10.2	6.6	0.1	0.0	10.3	6.6
	2002/03	8.9	4.3	0.1	0.0	9.0	4.3
	2003/04	9.8	7.1	0.0	0.0	9.8	7.1
	2004/05[1/]	9.9	9.0	0.0	0.0	9.9	9.0

Table 6 (continued)

Region	Meher season	Cereals		Pulses		Cereals and Pulses	
		Area ('000 ha)	Production ('000 tonnes)	Area ('000 ha)	Production ('000 tonnes)	Area ('000 ha)	Production ('000 tonnes)
Addis Ababa	2000/01	7.8	11.6	2.5	1.8	10.3	13.4
	2001/02	8.1	9.1	1.8	1.1	9.9	10.3
	2002/03	8.3	11.2	1.5	1.1	9.8	12.2
	2003/04	8.8	17.1	1.7	2.1	10.5	19.2
	2004/05	8.5	13.5	1.9	1.9	10.4	15.4
Dire Dawa	2000/01	9.7	5.8	0.0	0.0	9.7	5.8
	2001/02	11.3	5.8	0.0	0.0	11.3	5.8
	2002/03	8.4	1.0	0.0	0.0	8.4	1.0
	2003/04	11.4	4.3	0.0	0.0	11.4	4.3
	2004/05	12.0	9.6	0.0	0.0	12.0	9.6
TOTAL	**2000/01**	**9 814**	**11 781**	**1 504**	**1 019**	**11 319**	**12 799**
	2001/02	**9 845**	**10 960**	**1 502**	**1 005**	**11 347**	**11 964**
	2002/03	**9 502**	**8 157**	**1 515**	**767**	**11 018**	**8 923**
	2003/04[2/]	**9 036**	**10 699**	**1 268**	**794**	**10 304**	**11 493**
	2004/05	**9 231**	**13 007**	**1 408**	**1 261**	**10 640**	**14 268**

1/ Incomplete data.
2/ Use of CSA based data for Amhara begins.

3.8 *Belg* 2002, 2003 and 2004

Previous CFSAMs have had access to MoA reports of the *belg* crop. In 2004, no such report was available to the Mission. To clarify the situation, Mission teams visiting *belg* production areas collected as much information as possible from the offices with functioning agricultural information units and collated the data to obtain a 2004 *belg* crop estimate. Such data are included in Table 7, which compares them by Region with final *belg* post-harvest data for 2002 and 2003.

Table 7 - Ethiopia*: Belg* cereals and pulses production in 2002, 2003 and 2004

Region	2002		2003		2004	
	Area (ha)	Production (tonnes)	Area (ha)	Production (tonnes)	Area (ha)	Production (tonnes)
SNNP	117 235	46 469	71 442	52 345	55 953	28 319
Amhara	77 322	17 969	208 959	163 699	158 768	101 629
Oromiya	245 042	151 878	270 411	250 160	211 801	157 530
Tigray	na	na	22 290	20 626	5 580	4 740
TOTAL	**439 599**	**216 316**	**573 102**	**486 830**	**432 102**	**292 218**

Missing data preclude a valid comparison, however, production in all *belg* areas in Amhara, SNNPR, Oromiya and Tigray is noted to have been worse in 2004 than in 2003 but not as low as in 2002 in all but the southern most zones and *woredas.* Unfortunately, the Mission is not in a position to audit or adjust the *belg* data, they are presented in the report "as found". The final post-harvest production estimates for 2003 *belg* harvest collected by the Mission from the appropriate zones and *woredas*, are very similar to the returns released at this time the previous year totalling 487 000 tonnes, however, in the last three years, two *belg* crops have provided less than 300 000 tonnes, consequently, the Mission feels compelled to make a cautious forecast for the *belg* in 2005 at 250 000 tonnes of cereals and pulses should also be noted that, as in all previous years, maize yields used in 2004's estimates of the *meher* harvest include "maize eaten green." Excluding them would be misleading with regard to the production achieved. Carrying forward the total maize production to marketing year 2005 is only justified in the same way as the inclusion of the 2005 *belg* harvest is justified in that it is assumed that both green maize and *belg* harvests will be domestically available next year.

4. CROP PRODUCTION SITUATION BY REGION

4.1 Oromiya

Oromiya, comprising 14 administrative zones, is the largest region in the country extending in a "T" shaped landmass from near the Sudanese border in the west, across central Ethiopia near the eastern border with Somalia and southwards to the border with Kenya. It includes the most productive highland plateaux as well as drought-prone valley bottoms and lowland plains. In six of the southern zones a bimodal rainfall pattern is readily identifiable, usually providing a prolonged growing season and a wide range of cropping options. In the densely populated high rainfall zones, the small size of peasant land holdings necessitates production of two or three crops annually from the same land, if household needs are to be met. This places the farm families in a vulnerable position as the loss of a crop in a series cannot be compensated by increasing the area of the next crop in the sequence and increases the importance of the timeliness of operations at field level. A similar situation is faced by most of the farmers in SNNPR. In 2004, in general, poor *belg* rains were followed by a timely onset to the main season, except in the south and east extremities of the region. Breaks between *belg* and *meher* were evident, mostly due to an absence of rain in May resulting in a *belg* harvest estimated at 157 500 tonnes of cereals and pulses some 37 percent below 2003. Once the main season rains began they were, however, well -distributed geographically, if somewhat erratically in Arsi, E. Shewa and E and W. Hararghe and continued at least until October, except in Borena, positively affecting levels of crop performance and boosting regional production.

The timely availability of credit and fertilizers, plus pro-ploughing policies of the regional government, combined with good prices for cereals and pulses during the year, encouraged an expansion in cropped area and investment in inputs. Consequently, regional combined fertilizer (DAP and urea) use increased by 22 percent to 146 000 tonnes, 26 000 tonnes more than the previous year and 46 percent of the national *meher* season fertilizer use despite retail price increases ranging from 50-70 Birr per quintal for DAP and 50- 80 Birr per quintal for urea. Increase in use was particularly dramatic in Arsi (54 percent), North Shewa (37 percent) and West Wellega (35 percent). At the same time improved maize and wheat seed use went up in all zones except Illubabor, Jimma and East Wellega to augment the production potential of the locally available, farmer-multiplied varieties that form the basic seed stock of the region. Notwithstanding, the increase in the use of improved seeds, which conforms to the national pattern, seed availability *per se* was not an issue. With no major need to replant in 2004, sufficient farmer-saved seed was available on-farm and in local markets to meet the demands.

Normal seed rates and cultivation practices were observed resulting in an area planted to cereals and pulses 9 percent greater than the previous year. As all cereal areas are noted to have increased, at regional level there is no evidence of any shift from long-cycle to short-cycle crops. Commercial planting of wheat and barley by peasant farmers in Arsi and in Bale has been sustained wheat area, reflecting farmer confidence in the season. Arsi, Bale, West Shewa and East Shewa are zones in the productive central plateau that are characterized by high agricultural investment and mechanisation. In 2004 the performance of the four zones is estimated to have produced 66 percent of the regional and 48 percent of the national *meher* wheat harvests.

No significant outbreaks of pests or diseases were noted. Regarding migratory pests, BOA aerial spraying efficiently controlled minor infestations of Quelea quelea birds. Infestations of the regular non-migratory insect pests including sorghum chafer, stalk-borer, shoot-fly, boll-worm, grasshoppers, termites and aphids were all reported to have been mild in 2004. Vertebrate pests including non-migratory birds, wart-hogs and monkeys required the usual attention of the farmers wishing to protect their fields, particularly in the lead-in to harvest.

Current *meher* crop is estimated to have resulted in 7.28 million tonnes of cereals and 0.56 million tonnes of pulses, which is 31 percent greater than the previous year. The cereals comprise 1.87 million tonnes of maize, 30 percent more than the previous year; a sorghum crop of 1.06 million tonnes, which is 33 percent better than the previous year; teff, wheat and barley harvests of 1.11, 2.11, and 1.00 million tonnes are estimated to be 27 percent, 13 percent, and 33 percent better than the previous year. Consequently, grain prices in Oromiya, which are presently firm, being the same or higher than in November 2003 in all zones except the Hararghes and North and West Shewa, are expected to fall in the next two months when the new harvest is presented for sale. Local purchasing for distribution out of the region is recommended.

4.2 Amhara

Amhara Region, located in the north, north-west of the country includes the nation's highest mountain ranges, lowland riverine valleys and plains as well as agriculturally productive plateaux with well-established mixed farming systems. Comprising 10 administrative zones, the region usually produces around 33 percent of the national *meher* grain production. Following the national pattern of rainfall distribution and notwithstanding the within-zone vagaries of altitude, the western half of the region usually produces surplus grains from a substantial *meher* crop. The eastern half of the region has a less reliable *meher,* but contains zones where the *belg* crop may offer a substantial contribution to local annual production, depending on the year. In 2004, *belg* rains in the eastern production zones were not good and a reduced *belg* harvest of some 101 600 tonnes, 38 percent lower than the previous year, is estimated to have been produced. In most zones the start to the *meher* season was both timely and followed by well-distributed rains that continued throughout the season until October and November. Exceptions to this favourable pattern were noted by Mission teams in Zicuala *woreda* in north Weghamra and in Meket woreda, North Wollo, where the rains were generally poor; and erratic rainfall was recorded during the middle of the season in South Wollo and Oromiya zones.

Regionally, all cereals register a slight area increase over the previous year's data adjusted for the use of the CSA database; and the area to pulses is estimated to have fallen by 7 percent by way of compensation. The only other apparent cropping shifts noted are from oats and barley to teff in East Gojam. In the productive zones of Awi, West and East Gojam and in the rapidly expanding agricultural investment areas in west North Gondar, early starts to the *meher* and good mid-season rainfall encouraged planting of maize and sorghum. In the traditionally less favoured zones of North and South Wollo, rainfall although erratic was conducive to sorghum production with full planting and good crop stands readily apparent in the main sorghum growing areas on the lowland plains from Kemisse to Kobo.

No reports of cultivating difficulties reached the Mission and no significant fallow areas were noted in what remains a very intensively farmed region. New areas amounting to 15 500 ha are reported to have been brought into production through the activities of 13 000 resettlers in 5 sites (4 sites in N.Gondar and 1 site in Awi). The area under commercial enterprises is now estimated to have reached 40 000 ha of mixed crops of which 50 percent are oilseeds (sesame). Data for both systems are incorporated the Mission' calculations for the region.

Regarding seed availability, given the previous year's good season no seed shortages were either anticipated or required. Improved seed use increased again in all zones to accommodate 15 percent of the maize area and 6 percent of the wheat area. Seeding rates are noted to have been be normal with no need for replanting noted except for 250 ha of barley reported to have been replanted to chickpeas in Sekota, Weghamra.

Input utilization in the region in 2004 follows the pattern established the previous year with fertilizer use increasing in all zones to 31 percent of the national input to 102 000 tonnes with notable increases of 93 percent, 52 percent and 48 percent in North and South Gondar and East Gojam zones, respectively. Problems relating to empty stores and untimely deliveries that thwarted purchasers the previous year, were not reported in 2004. In 2004, DAP and urea were available on time to meet the demand albeit at official prices 30-70 birr per quintal higher than the previous year but still much cheaper than the parallel market that emerged at the time of the shortages noted the previous year.

Pest and disease outbreaks were noted to be minimal with no migratory pests reported. Non-migratory pests noted in 2004 as most years included sorghum chafers in the eastern zones, Wollo bush crickets, stalk-borers, aphids, termites and grasshoppers but no infestations were described as anything but mild.

Good *meher* crop production is evident throughout the region. This generalization includes very productive areas in West and East Gojam and good production in *woredas* in most other zones including the eastern lowlands of South and North Wollo. The only exceptions noted by the Mission are Zicuala, Weghamra and Meket, North Wollo and adjacent *woredas* to the west and north of Meket leading to Lalibella. The resulting cereal harvest is estimated at 3.37 million tonnes, 26 percent better than the corrected figure for 2003. Pulses show an improvement to reach 0.47 million tonnes. Of the cereals, all manifest a 20-30 percent increase in production in 2004 due to improvement in yield estimates; teff at 0.8 million tonnes, maize at 0.72 million tonnes contribute more than wheat at 0.57 million tonnes, sorghum at 0.62 million tonnes, barley at 0.36 million tonnes; and finger millet at 0.23 million tonnes makes up the remainder of the crop. Cereal

prices are similar to the previous year but are expected to come down in the next couple of months as market presentations increase.

Livestock condition is universally good (cattle body condition scores 3-4) with pasture and water supplies and crop residues meeting feed requirements. Livestock prices are stable at rates similar to or higher than the previous year. At the time of the Mission there had been no early migration of animals in or out of the region, although movement from Afar was expected to begin earlier than normal.

4.3 Southern Nations Nationalities and Peoples Region (SNNPR)

Presently formed from 15 zones and 6 special *woredas,* the SNNP Region is the most culturally diverse in Ethiopia. The cultural diversity is matched by a wide range of agro-ecologies encompassing everything from rainforests to deserts. Bi-modal rainfall patterns exist throughout the region offering opportunities to crop 2 or 3 times per year on the same piece of land. Very small land holdings, however, create a structural vulnerability to dry spells at crucial times in the production cycles, as increased planting later in the year cannot easily compensate for lost opportunities. Fortunately, the majority of the rural population eat enset. This perennial carbohydrate source, also known as false banana, is very resistant to rainfall fluctuations and provides a carbohydrate based food safety net for most farm families in the highland and middle altitude communities. The ubiquitous presence of perennial cash crops including coffee, chat and eucalyptus confirm the overall natural resources wealth of SNNPR in all but the lowland localities, where pastoralism is the main agricultural enterprise.

In 2004, *belg* rains were poor resulting in a harvest of 28 000 tonnes, the lowest in the past three years. However, after no rain in the last two decades of May, although the majority of the zones and special received reasonably distributed and adequate *mehe*r rainfall, in South Omo, Gamo Gofa and Konso the *meher* season was also poor and the rains were erratic during the main season in Sidama and Gurage. Consequently, the Mission notes a 77 000 ha shift from maize and sorghum areas to short cycle cereals and pulses. Overall total grain area has been sustained at the previous year's higher level at 1.29 million ha, however, cereal area has dropped by more than 5 percent Certainly, in the enset eating high and middle altitude zones of the region, cereals are of secondary importance for food security, therefore, economic forces have a greater role to play in planning cereal area than in marginal areas located in the lowlands. The sustained increase in field crop area since 2002 implies that neither means of cultivation nor seeds were in short supply. As elsewhere, local seeds provided most of the planting material; improved seed distribution was sustained in the commercial maize growing zones.

At the regional level, fertilizer use increased by 30 percent to 10 percent of the market share at 33 000 tonnes due to more timely and widespread distribution patterns, despite increases of 50 Birr per quintal for DAP and 80 Birr per quintal for urea.

Pests and diseases are noted to be minimal. Regarding migratory pests, outbreaks of quelea birds were noted in Konso and Amaro special *woredas*, no outbreak ensued due to controlling measures undertaken by the federal Ministry of Agriculture. All other pests are noted as mild, nevertheless non-migratory vertebrate pests from the forests require an inordinate amount of farm labour to avoid substantial losses. Storage pests are also noted to remain causes for concern.

Consequently, the Mission anticipates a *meher* cereal and pulse harvest similar to the previous year at 1.58 million tonnes, comprising about 647 000 tonnes of maize (down 16 percent), 117 000 tonnes of sorghum (down 12 percent), 171 600 tonnes of teff (up 13 percent), 324 500 tonnes of wheat (up 21 percent), 146 000 tonnes of barley (up 29 percent), and 171 000 tonnes of pulses (up 17 percent). Regarding other crops this *meher* season, areas to both potatoes and sweet potatoes are estimated to have increased three fold to a combined area of 72 000 ha, similar to the area estimated for enset by the BOAs. With conservatively estimated yields in the order of 15-22 tonnes per ha such crops, potatoes should be contributing the equivalent of a further 288 000 tonnes of cereals by the end of the *meher* season. Such a contribution although significant does not match the annual production from enset, which, from a similar area of established orchards and given an 8 year cycle of tree turnover, may be producing around 468 000 tonnes of cereal equivalent.[5]

[5]Assumptions for enset; 72 000 ha connects to an annual harvest of 9 000 ha given stable orchards and an 8 year cycle yielding 130 tonnes of *kucho* per ha (52 kg per tree at 2x2m spacing) and estimating *kucho* at 40 percent dry-matter, enset harvested over a year may provide 468 000 tonnes of net starch.

Livestock condition in the zones and special *woredas* visited by the Mission team was recorded as good (cattle body condition scores 3-4) with no problems noted relating to pasture or water supply. However, the team did not visit South Omo, where deteriorating pasture and water conditions were reported to be cause for concern leading to some livestock movement out of the zone, until the recent rains. Presently, livestock prices are the same or higher than the previous year throughout the region with the exception of South Omo. Grain prices, on the other hand, are beginning to fall as market presentations of the new harvest are increasing.

4.4 Tigray

Tigray, the northernmost region of Ethiopia bordering Sudan and Eritrea, has a cultivated area of about 800 000 ha farmed by some 775 000 households and 400 investors located in the western lowlands. Usually classified as a food-deficit area due to its semi-arid climate and high population density, the region has embarked on major environmental rehabilitation programmes over the past ten years. Presently, it is in the process of linking food security issues to watershed management with the objective of improving employment and income generation opportunities in the central and eastern zones. The food deficit status of the region masks the fact that in most years there is surplus crop production from well-organized run-off based, peasant farming systems in the South Zone and from the fore-mentioned mechanized commercial enterprises in the western lowlands.

In 2004, the *belg* rains were poor, supporting less than 25 percent of the *belg* crop harvested in South Tigray the previous year. Thereafter, a late start to the *meher* heralded a worse season than the previous year in the Eastern Zone and in northern *woredas* of the South Zone and southern *woredas* of the Central Zone. Elsewhere, more timely and better distributed rain during July and August encouraged and sustained *meher* season production possibilities. Unfortunately, in the Eastern Zone, the rains finished early with adverse effects on yields of late sown crops. Similarly, some 50 percent of the spate dependent area in the Mehoni lowlands abutting the eastern escarpment, received fewer floods than necessary to support the anticipated sorghum crop, consequently such areas were sown to rainfed teff instead, which performed poorly. Neighbouring communities in Alamata benefited extensively from at least two run-offs and good rains in the middle of the season supporting maize and sorghum production and continuing the long sequence of highly productive sorghum plains that begin in Cheffa, Kemisse, traverse South and North Wollo and end at Alamata.

Meher season rains in the north-west and west were timely and their onset was followed by good distribution and a late finish, supporting the extensive fields of later sown sorghum in Shire that will be harvested in January. Backyard maize production was also noted by the Mission to have performed well throughout the central and north-western woredas reflecting (i) choice of location for planting to catch available run-off; (ii) selection of better water retaining soils and (iii) higher organic content of the soils near to the homesteads.

Regional fertilizer use decreased by 35 percent to some 2.7 percent of the market share at 8 800 tonnes as farmers opted for low input approaches in the face of climatic uncertainty. As elsewhere, seed supply in 2004 was almost entirely from farmer-saved stocks, local markets or seed banks. Improved marketing opportunities to Sudan, enhanced by improved roads, better transport facilities and a permeable border has stimulated a significant increase in sesame planting in the North West and Western Zones. The regional oilseed area has increased by 47 percent to 187 000 ha as investors[6], resettlers[7] and settled farmers in the two zones have expanded the farmed area by 20 000 ha and moved 40 000 ha from cereals to a more lucrative commodity, sesame, presently being sold at 650 Birr per quintal. Consequently, the regional area planted to cereals and pulses has fallen by 5 percent. Mission estimated yields are also lower than the previous year as neither the rainfall condition nor fertiliser use were as good. However, no significant outbreaks of pests and diseases were noted. The Mission estimates that cereal and pulse production will be down 10 percent from the BOA post harvest estimate at around 633 000 tonnes, with a teff harvest of 77 000 tonnes (down 17 percent), wheat at 65 000 tonnes (up 13 percent), barley and hamfes (mixed barley and wheat) 86 000 tonnes (same) maize at 90 900 tonnes (down 6 percent) , sorghum at 214 000 tonnes (down 8 percent), and finger millet at 64 700 tonnes (down 27 percent).By contrast pulse and oilseed estimates are up by 31 percent and 86 percent at 37 000 tonnes and 88 000 tonnes respectively.

[6] 399 investor farming c.90 000 ha.
[7] 2 resettler areas in West Tigray; 20 000 households and 14 000 ha.

4.5 Afar

Afar, an arid region located in the north-eastern part of Ethiopia has an agro-ecology characterised by low erratic rainfall and high temperatures, 2004's rainfall has been meagre, worse than the previous year in both amount and distribution, generally unfavourable for pasture and browse growth and is reported to be reducing water availability for human, crop, and livestock in most areas, highly critical for the many pastoralists dominating the region whose cattle, sheep/goats, and camels are the major source of livelihood. Because of the relative drought intolerance of cattle and sheep compared to goats and camels, body condition of the former along the Tigray and Amhara border was noted to be poorer than elsewhere in the country. The effect on their performance will not be fully appreciated until next year. Pasture conditions are reported to be fragile and heavily dependent on any further late season rains, particularly in areas in Zone 3 where conflict areas may restrict access to pastures. Continued concerns are voiced about the pervasive invasion of prosopis species (mesquite) and the resulting erosion of indigenous rangeland browse.

Unlike anywhere else visited by the Mission in 2004, prices for all classes of livestock are noted to be falling and crop prices are higher than this time the previous year generating disadvantageous terms of trade for the livestock rearers. Premature migration of cattle herds to Amhara is anticipated and the Mission team in the north noted the movement of hundreds of camels, in good body condition, suitable for slaughter, crossing from Afar to Western Tigray, in a series of camel trains, presumably destined for the meat trade in Sudan.

Afar's harsh and dry climate prevents crop production except in areas in northern zones and river bed areas where run-off from the eastern escarpment serves minor spate irrigation and facilitates production of cereals, pulses, and some cotton, Approximately 21 000 ha of cereals and pulses are estimated to have been planted in 2004 dependent on irrigation, twice the previous year's estimates probably due to better data collection. Yields are higher at 1.5 tonnes per ha because of the influence of 9 500 ha irrigated maize, producing 2.5 tonnes per ha, on the total production figure of 33 000 tonnes.

4.6 Somali

The Somali Region, predominantly a pastoralist, agro-pastoral area, is located in the semi-arid south-eastern corner of Ethiopia. With a predominantly nomadic population of nearly 3.5 million, only 15 percent live in urban centres and an estimated 90 percent of the population derive their livelihood from pastoralism and animal related activities. Rainfed cereal production is generally concentrated in villages and towns along the Wabi-Shabelle river complex and by settled farmers in the highlands and middle altitude areas in Jijigga and Shinelle zones. Permanent irrigation schemes along the river complex facilitate the production of a variety of annual crops along with some perennial crops including bananas, fruit trees and chat. This region is one of three areas in Ethiopia reporting rainfall conditions worse than the previous year. Below average and erratic rainfall was reported during Mission visits to Jijigga Zone wherea normal start to rains in June was compromised by numerous breaks, leading to early pastoralist migrations within the region. Late and meagre *gu* rains (April to June) characterised the early season in the southern zones where the missed rains in April were compounded by late arrival of the *deyr* (Oct.-Jan.) rains. The *deyr* rains have been mixed with emphasis on poor rains in Warder, Dagahbur and Gode zones while in Jijigga, Shinille, Fik, Liban, Afder, and Korahe zones conditions reported to be normal or improving to normal according to the monitoring of the regional Food Security Bureau. Difficulties in accessing many of the zones result in regional crop production being estimated only for the Jijigga and Shinille Zones.

Fertiliser use in the region is minimal restricted to demonstration plots and improved seed use non-existent as farmers use their own seeds carried over from year-to-year. Crop pests and diseases in 2004 included migratory quelea birds that were controlled by spraying and stalkborer infestations of maize and sorghum is noted to have been ubiquitous. Total cereal output at 114 000 tonnes from 193 000 ha is twice as much as the previous year from an area reduced by around 9 percent. This increase is due to more realistic yield estimates that are, nevertheless, still way below 2004's national averages for all crops, rather than better production *per se*. Both grain prices and animal prices are noted to be falling below the price of commodities the previous year at this time and six months ago.

Livestock condition is generally improving from the poor state described by other agencies earlier in 2004, the extent of the improvement being dependent on the persistency of the *deyr* rainfall. Reports from several humanitarian agencies that are active in the area indicate there are still water shortages in many of the eastern districts. In Warder Zone, limited bore holes and water shortages have induced water sales compounded by a movement of livestock into the zone from Somalia. With calving time coinciding with water shortages, lower milk production and higher neo-natal mortality is anticipated in such areas. Animals are

reported to be moving out of Daghahbur Zone, where similar conditions pertain to better pasture and water supply situations elsewhere in the region.

4.7 Harari

Harari is a small region surrounding the city of Harar with some 12 000 ha of agricultural land. Apart from chat, the main products are usually sorghum and maize. In 2004, the *meher* rains were early in April but the promising start was followed by a fragmented season that finished late in October. Nevertheless, the season was better than the previous year. The early start prompted the planting of long cycle cereals in the first week of May. Local seeds were available in sufficient quantity to meet the seed requirement and fertiliser use increased four fold to 700 tonnes. Despite widespread stalkborer infestations, production of cereals is estimated to have increased to 9 000 tonnes from 9 900 ha being a 28 percent improvement due to better yields. More than seventy percent of the crop is sorghum, 19 percent maize and the rest is teff. Livestock condition is noted by the Mission team to be good, with adequate grazing and water available for the settled stock in the area. Animal and grain prices are firm and higher than the previous year.

4.8 Dire-Dawa

Sorghum, maize and vegetables are the main crops grown around the city of Dire-Dawa. In 2004 the rains began on time in April but were meagre, unevenly distributed and erratic rain until August, from when they have been regular and have continued until October. Consequently, planting and replanting continued using local seeds at the normal sowing rates until crop establishment was secured. Area planted to cereals, mostly sorghum, is estimated at 12 000 ha producing 9 600 tonnes, which is more than twice the estimated crop the previous year, given the migratory pest free year. Livestock condition noted by Mission teams was poor, migration to East Hararghe was reported as lowland pasture resources were said to be low and water scarce. Late rain in December may have helped to improve the situation.

4.9 Addis Ababa

The area planted to cereals and pulses in 2004 in Addis Ababa administration area is almost similar to the previous year at 10 400 ha. Good rainfall beginning in mid-May has continued without any breaks or dry spells until December supporting crop growth and development. Fertiliser use through purchases via the urban agricultural department fell by 50 percent to 850 tonnes, as farmers who had not paid debts incurred the previous year have lost the right to buy, however the data is probably incomplete, as farmers probably bought inputs privately from the urban traders. Following a year when husbandry practices were normal and with no significant pests and diseases, cereal production is about 21 percent lower than the previous year at 13 500 tonnes due to the reduced use of fertiliser. Pulse production is also lower by 10 percent at 1 900 tonnes.

4.10 Gambella

Gambella Region, located in south-west Ethiopia bordering Sudan, is a lowland area with regular rainfall and seasonal floods from permanent rivers that bisect the region providing the opportunity for at least two crop production cycles per year, one from rain and one from residual moisture. The Region, which has experienced much movement of refugees from Sudan in the past decade is inhabited by cattle pastoralists (Nuer), shifting cultivators (Anuak) and settlers from the central highlands. Currently internecine conflict and random acts of violence are disrupting farming patterns and the other diverse livelihood systems fishing, hunting-gathering and cross-border trade seen to be as important as agriculture to the household food economies are also negatively affected from time to time. Some 6 000 families are currently taking refuge in Pochalla district in Sudan. As no Mission team visited Gambella in 2004 agricultural information is scanty comprising only data from the regional BOA that appears to be incomplete as no extensive crop assessments have been conducted. Rainfall data is also incomplete. Information from BOA sources indicates a reduced harvest of cereals of 13 200 tonnes from 9 600 ha.

4.11 Benshangul Gumuz

Benshangul Gumuz Region, bordering the eastern clay plains of Sudan is a lightly populated, low-lying Region with a uni-modal rainfall, which supports crop and pastoralist livestock production. In 2004 the rains were universally favourable, a timely start was followed by well-distributed rainfall that finished late in all five zones. Consequently, normal farming practices were observed. With availability of credit reduced due to non-payment of debts and regional government budget cuts, fertiliser use throughout the region has fallen by

some 40 percent to 350 tonnes, nevertheless cereal production is similar to 2003 estimate of about 160 000 tonnes from 133 000 ha. No major field pests or disease problems completed the favourable profile of growing conditions that have sustained the 50 percent increase in regional cereal and pulse production noted in 2003. Oilseed production is also noted to have increase to around 9 000 tonnes.

5. CEREAL SUPPLY SITUATION

5.1 Grain markets and prices

Agricultural grain markets in Ethiopia function through a limited number of small traders who buy surpluses from small farmers and sell in the nearby markets at relatively small margins. These markets function in relative isolation and grain movements from surplus to deficit areas are constrained by high transport costs due to poor road infrastructure, weak market information systems, and a quasi monopoly in the transportation sector. Consequently, whenever the harvest is good, supply exceeds demand and grain prices fall sharply.

Figures 2, (below) indicates the average monthly wholesale price for teff, wheat, maize and sorghum in Addis Ababa. The grain price movement observed in 2004 followed a typical seasonal pattern of a steady month-on-month decline in grain prices soon after the start of the main *meher* harvest (September-January), then increasing thereafter during the pre-harvest months (July-September). Teff prices seem less volatile, indicating a relatively steadier demand, while the volatility in sorghum prices is highly pronounced. Cereal prices are expected to fall in 2005 for several months to come. Continued and increased local purchase of cereals for food assistance needs, which averaged around 200 000 tonnes in the last four years, would provide some firmness to the grain market.

Figure 2 - Monthly average wholesale prices of main cereals in Addis Ababa, Ethiopia (Oct. 2001-Oct 2004)

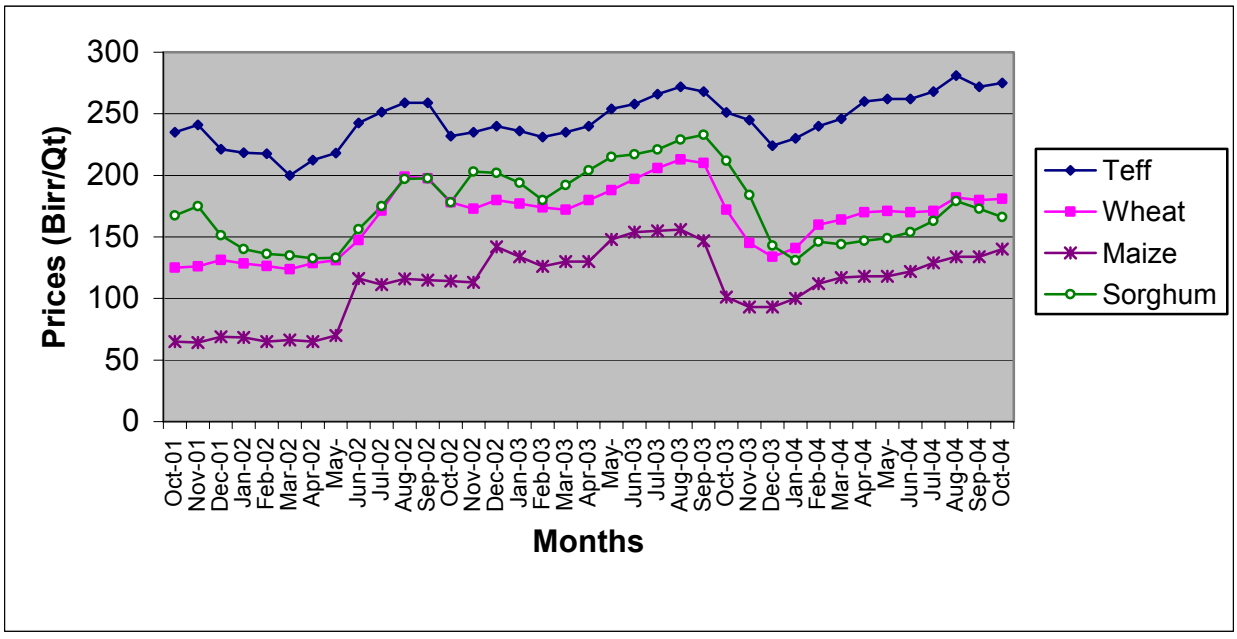
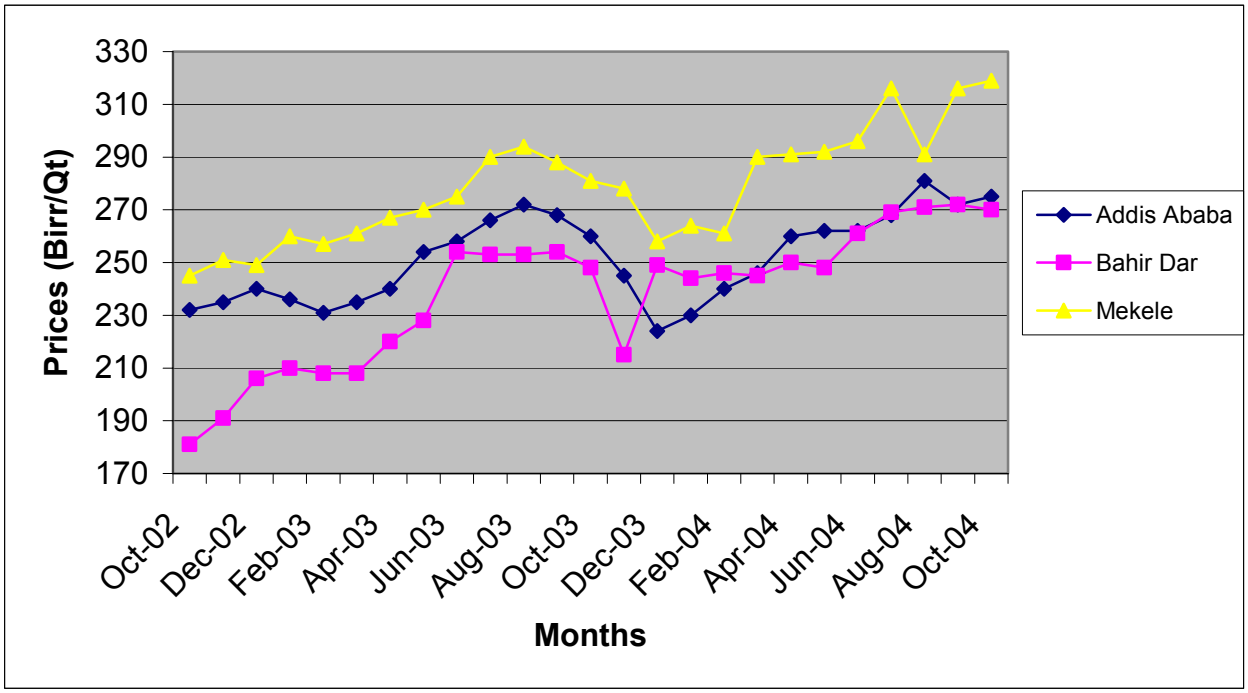


Figure 3 (below) shows the average monthly wholesale price for teff in Addis Ababa, Bahir Dar, a surplus producing zone and in Mekele, a deficit area. Larger grain movements from surplus to deficit areas are still constrained by high transport costs due to poor road and marketing infrastructure.

Figure 3. Teff, monthly average wholesale prices in three different markets in Ethiopia (Oct. 2002-Oct 2004)



On the input side, the fertilizer sector has been deregulated and opened for private competition. Indeed, following the issuance of the fertilizer policy, the pan-territorial fertilizer pricing system was eliminated and subsidies were removed. However, aware of the strategic role of the fertilizer sector in achieving self-sufficiency and alleviate poverty, the government of Ethiopia is still involved in the sector by making credit available to farmers and encourage more fertilizer use. In 2003/04, total fertilizer availability amounted to 380 912 metric tonnes comprising 374 748 metric tonnes of new imports for a total value of US$ 94.053 million and 6 164 metric tonnes of carry-over stocks. Only three companies have competed in the import and the distribution operations this cropping season. These are the Agricultural Input Supply Enterprise, Ambassel trading house and Wondo trading company.

Retail prices of DAP and urea in 2004 registered a significant increase owing to a surge in international prices. Field interviews have shown a hike in the retail prices of fertilizer of up to 22 percent for DAP in Amhara region and 43 percent for urea in Oromiya region. However, despite this increase in retail prices, the level of fertilizer demand in 2004 amounted to 323 000 tonnes, accounting for a 19 percent increase compared to the previous year's demand. Details regarding total fertilizer supply, carry-over stocks, new imports and final demand for 2003/04 cropping season are shown in Table 8 below.

Table 8 – Ethiopia total fertilizer balance for 2003/04 (tonnes)

	Agricultural Inputs Supply Enterprise		Ambassel Trading		Wondo Trading Company		Total		
	DAP	Urea	DAP	Urea	DAP	Urea	DAP	Urea	Total
Total	**135 557**	**99 633**	**58 761**	**43 291**	**41 674**	**1 991**	**235 992**	**144 920**	**380 912**
Carryover	1 554	1 651	759	209	-	1 991	2 313	3 851	6 164
New	134 003	97 982	58 002	43 082	41 674	-	233 679	141 069	374 748
Final							**211 000**	**112 000**	**323 000**
Closing							24 992	32 920	57 912

Source: Agricultural Input Market Department, Ministry of Agriculture and Rural Development (MoARD).

5.2 Grain supply/demand balance

The projected supply/demand balance for cereals and pulses for the 2005 (January-December) marketing year is summarized in Table 9. It is based on production estimates of 2004 *meher* crop, a forecast of 2005 *belg* crop and the latest information on trade and stocks. Total cereal and pulse production is estimated at 14 518 million tonnes, including 14 268 million tonnes from the main *meher* crop, and a provisional forecast of 250 000 tonnes for the 2005 *belg* crop.

- The opening stocks for the marketing year 2005 are estimated at 400 000 tonnes. These include an estimated 63 000 tonnes held by the Ethiopian Grain Trade Enterprise (EGTE); approximately 50 000 tonnes with commercial traders; about 45 000 tonnes with small farmers in the surplus producing areas; and approximately 242 000 tonnes with the Emergency Food Security Reserve (EFSR). The EFSR is a revolving grain fund with a maximum stock size of 407 000 tonnes. Several national and international agencies including DPPC, WFP, EGTE, donors, and NGOs borrow grain from it on a six month contract against a confirmed donor contribution.
- The closing stock is forecast at 800 000 tonnes. The increase in closing stocks compared to beginning stocks reflects the large increase in crop production in 2004[8].
- Food use is based on a projected population for the mid-year 2005 of 73.044 million and average per capita grain consumption (cereals and pulses) of 156 kg per year.
- Feed use is forecast at 400 000 tonnes largely for the consumption of poultry industry, dairy industry and equines.
- Seed requirement is estimated at 715 000 tonnes based on the seed rates used in Ethiopia and a 5 percent increase in the area to be sown in 2004/05[9].
- Post harvest losses are estimated at 1 625 000 tonnes based on post harvest loss rates ranging from 3 percent for teff to as high as 20 percent for maize and 25 percent for pulses[10]. Post harvest losses account for 11.5 percent of the total *meher* harvest.
- In light of an estimated 60 percent increase in pulse production, pulse exports in the coming marketing year are expected to be around 100 000 tonnes, about 44 percent higher than 2003-04 export level.

Table 9 - Ethiopia: Total grain supply/demand balance, January-December 2005 ('000 tonnes)

Domestic availability	**14 918**
Opening stocks	400
Production	**14 518**
Meher	14 268
Belg	250
Total utilization	**15 035**
Food use	11 395
Feed	400
Seed use	715
Losses	1 625
Exports	100
Closing stocks	**800**
Import requirement	**117**
Commercial imports	93
Confirmed food aid	24

Table 9 shows a cereal import requirement of 117 000 tonnes. With confirmed food aid pledges amounting to 24 000 tonnes, the Mission estimates that Ethiopia has the capacity to commercially import the remainder amounting to 93 000 tonnes. These commercial imports consist largely of durum wheat and wheat flour, rice, semi-milled or wholly milled rice, oats and maize seed.

[8] This stock level represents a bit less than one month of national food consumption requirement and is considered to be an advisable level to maintain, given the well-documented level of variation in production of both the meher and the belg harvest.

[9] Seed rates used are 30 kg/ha for teff, 135 kg/ha for wheat, 110 kg/ha for barley, 120 kg/ha for hamfes, 25 kg/ha for maize, 12 kg/ha for sorghum, 80 kg/ha for millet, 100 kg/ha for pulses and 80 kg/ha for other crops.

[10] Storage losses: wheat 8 percent, barley 8 percent, hamfes 8 percent, sorghum 10 percent, maize 20 percent, pulses 25 percent, finger millet 5 percent, teff 3 percent and other crops 7 percent.

Notwithstanding the above, food access will remain a serious challenge for large number of households. Confirmed cereal food aid in the pipeline and pledged for food in 2005 currently stands at 24 000 tonnes. As far as possible, continued and increased local purchase of cereals for food assistance needs, which averaged around 200 000 tonnes in the last four years, is recommended to assist domestic markets and farmers.

5.3 Emergency Food Aid Requirements[11]

For the first time in the history of the issuing of appeals for food aid assistance for Ethiopia, there is a difference in approach in addressing the needs of chronically food-insecure people and acutely food-insecure people. The 2005 Humanitarian Appeal, released in late December 2004, requests support for 2.2 million acutely food-insecure people who will need emergency food assistance in Ethiopia during the year. This is in addition to the Productive Safety Net Programme (PSNP), which commences in January, a new food security programme which is to tackle longer-term food security needs and is expected to eventually reach 5 million chronically food-insecure people in 2005 with cash and food transfers. Thus while the total number of people targeted for assistance has not drastically changed from that of the previous year, the number that now fall under the Humanitarian Appeal is significantly reduced. Emergency food needs are now defined as the needs of people affected by acute, unpredictable disasters, which are mainly drought induced. The main features of the PSNP are multi-annual funding, transition towards cash-based programming, scaled-up public/community works, linkages with broader food-security programmes and development objectives and harmonized budgeting, monitoring and evaluation. “Direct transfers” as food or cash transfers will be provided to those households that are unable to participate in community-based activities.

Safety Net transfers for the pastoralist populations in Afar and Somali Regions are scheduled to start later in 2005, and the emergency programme will respond to identified food assistance needs for both acutely and chronically food insecure families in these two regions for at least the first half of 2005.

Areas of significant emergency food aid requirements outside these pastoralist regions are East and West Hararghe Zones in Oromiya Region, Eastern Tigray Zone and parts of Southern and Central Tigray Zones, and lowland parts of SNNPR. In spite of the favourable rainfall pattern elsewhere, in all these areas rainfall was not sufficient for normal crop production, and has led to increased food insecurity in areas which already large numbers of people had considered to be vulnerable.

5.3.1 Review of the 2004 humanitarian response

Emergency conditions in 2004 were less severe than in 2003 but the population in need remained challenged by destitution and accompanying severe food insecurity. The year 2004 was a transitional year in which the PSNP and its working modalities have been elaborated to enable the chronically food insecure population to be assisted separately. Therefore, the overall objective of interventions in 2004 was to address the emergency needs of the most vulnerable populations and to reduce suffering in the aftermath of the drought and acute crisis of 2003.

With an initial estimate of 7.2 million people requiring emergency food assistance in 2004, identified in November/December 2003, relief food requirements were 965 000 tonnes for the year. The first response was undertaken with carryover contributions from 2003. Unlike in previous years, the standard rate of 15 kg/person/month of cereals for general rations was maintained. Furthermore, pulses and oil were also included in the general ration and fortified blended food was more available than in previous years.

The mid-year multi-agency assessment identified the impact of poor 2004 *belg*/g*u* rains in many parts of the country. There were harvest failures in Tigray, along with poor yields in eastern Amhara, eastern lowlands of Oromiya and in pocket areas in SNNPR, as well as pasture and water shortages in Somali and Afar, Borena Zone of Oromiya and South Omo Zone of SNNPR. The drought conditions demanded that most beneficiaries scheduled to graduate out of food assistance in July had to remain on the distribution lists, while additional beneficiaries were also identified for the August-December period. Hence, the peak beneficiary figure in need of food assistance in August/September rose from 7.2 to 7.8 million people, and annual requirements increased from 965 000 tonnes to 1.2 million tonnes.

In March/April, multi-agency teams assessed the resettlement sites in Oromiya, Amhara and SNNP Regions. The findings showed that some resettlement sites in Bale Zone and western Oromiya had alarming

[11] The full reports upon which these estimates are based, namely, ”Ethiopia Humanitarian Appeal 2005” and “Productive Safety Net Programme”, are available with WFP Ethiopia.

malnutrition among children and urgent interventions were needed. About 2 980 tonnes of supplementary food items (adequate for four months distribution of blended food, pulses and oil) were delivered to resettlement sites, in consultation with donors, to complement food provided by the region. Under the Government's voluntary resettlement programme, during 2003 and 2004 a total of about 365 500 people were resettled (Oromiya Region 264 000, Amhara Region 32 300, Tigray Region 30 700 and SNNPR 38 500).

Efforts made during the year by all the concerned agencies contributed to preventing famine-related mortality and largely avoided expensive and challenging therapeutic feeding operations. In 2004, roughly 856 000 tonnes of emergency food were distributed so that 70 percent of the estimated annual requirement was met, as shown in Table 10 below:

Table 10 - 2004 beneficiaries, quarterly relief food requirement and distributions

	January-March	April-June	July-September	October-December	January-December
Beneficiaries (quarterly average in millions)	3.2	6.8	7.0	4.5	**5.4**
Requirements (tonnes)	178 856	381 080	391 936	257 462	**1 209 334**
Distributed (tonnes)	136 187	222 379	335 330	162 000	**855 896**
Coverage (%)	76.1%	58.3%	85.5%	62.9%	**70.7%**

As in previous years, distributions in 2004 were primarily made using the Employment Generation Scheme (EGS), a type of "food for work" or "food-for-assets" activities that are intended to maximize the benefit of relief resources by linking them to the creation of sustainable developmental assets, for able-bodied beneficiaries; gratuitous distributions were made to those unable to participate, or having no family members who could participate, in EGS.

Some key lessons from 2004 have been noted and warrant attention. In spite of strenuous efforts and policy guidelines, targeting of relief assistance to the most vulnerable families still requires continuous efforts and training of community committees in effective targeting. A reduced food basket should be avoided. Donors should support the Government in providing a full food basket from the outset in future emergencies.

Relief food aid requirements and actual distributions in Ethiopia have varied considerably in recent years, as is outlined in Table 11. Table 12 gives the breakdown for 2004, comparing contributions to distributions and indicating the tentative balance at the end of the year.

Table 11 - Relief food aid estimates and distribution 1995–2004

Year	January estimate (tonnes)	July estimate (tonnes)	Delivered/ Distributed[1/] (tonnes)	Distributed as percent of estimated needs	Population requiring food assistance (millions)
1995	427 000	493 000	347 400	70	4.0
1996	291 000	262 000	219 000	84	2.7
1997	186 000	329 500	306 000	93	3.4
1998	420 000	602 000	295 000	49	5.3
1999	182 000	460 600	391 600	85	6.6
2000	764 000	1 337 700	999 100	75	10.2
2001	545 400	630 600	540 000	86	6.2
2002	557 200	897 300	580 000	65	6.3
2003	1 461 700	1 802 400	1 515 300	84	13.2
2004	911 000	1 209 300	856 900	71	7.8
Average	574 500	802 400	605 000	76	6.6

1/ Includes WFP emergency assistance, bilateral contributions to DPPC and contributions through NGOs. 2004 distribution data is provisional.

Table 12 - Relief food aid contributions, distributions and balance 2004 (comprises cereals, blended food, pulses and vegetable oil)

	Tonnes
2004 Contributions (including 2003 carryover stocks/pledges)	955 765
2004 Estimated distributions	855 896
Carryover stocks[1/] and pledges into 2005	99 869

1/ Provisional figure for carry-over stocks; there are also some carry-over stocks at the *woreda* level, to be reconciled in January 2005.

5.3.2 Needs assessment process

To identify emergency needs for 2005, assessments were carried out between September and November 2004 by each sector. Technical teams with members of the Government, donors, NGOs and the United Nations were organised and coordinated by the Sector Task Forces and all crop producing areas as well as pastoral regions were assessed. For the DPPC-led food needs assessment, a total of twenty-three teams were deployed. The assessments were predominantly qualitative. In order to substantiate data from zonal and *woreda* officials, teams used rapid rural assessment techniques where the situation permitted. Interviews were conducted at *woreda* level with local officials, communities and household. The teams briefed and debriefed at the federal, regional and zonal levels and sought endorsement of 2005 emergency requirements with *woreda* details by each region. The DPPC-led teams evaluated relevant food security and livelihoods indicators such as weather conditions, *meher* production; market conditions and other income sources; wage labour opportunities and purchasing power; crop and livestock conditions and performance; performance of cash crops such as coffee and chat; movement of people/migration; access to and utilisation of seeds, water, pasture and feed; availability of veterinary and health services, etc. The DPPC-led multi-agency emergency needs assessment was complementary to the FAO/WFP Crop and Food Supply Assessment Mission, the findings of which corroborate in general the observations made by the teams.

5.3.3 Household food security outlook in 2005

Below are the highlights of the results of the DPPC-led assessment and the FAO/WFP CFSAM as they relate to vulnerability, by region. Cropping areas are described first, followed by pastoralist areas.

Tigray. Chronic problems such as land degradation, population pressure, poor access to markets and recurrent rain failures have weakened the asset base and coping ability of most rural households in Tigray. The current crop supply situation, outside of the west and north-west, was negatively affected by the late onset and the early finish of the *meher* rains, and is worst in Eastern Zone and parts of Southern and Central Zones. Few sources of income are available to supplement crop production and income from livestock production, which are both down. Traditional sources of wage labour, petty trade and remittances are still curtailed by the on-going closure of the border with Eritrea. Local supply of grain to the market is observed to be scanty in volume and the price is higher compared to the same time the previous year. Shortage of pasture has led to a deterioration in the physical condition of livestock in some lowland areas. Low demand and high supply of livestock and thus decreased prices characterize the livestock market conditions in the many parts of the region. Current crop production will support most households in the affected parts of the region for a few months only, and with decreasing income from livestock sales, there will be a high reliance on food aid to fill much of the food gap in 2005, through both the Safety Net programme and the emergency food aid programme.

Amhara. Given the good *meher* crop prospect, improved market prices and productivity of the livestock, the water harvesting endeavours to increase incomes as well as diversification efforts such as various packages being implemented by the Government, the food security situation of most people in the region, unlike some years in the past, is expected to remain stable. However, as a result of the structural food deficit in some *woredas*, and adverse conditions in some areas (including poor *meher* harvests in parts of Weg Hamra and parts of North Wollo, and poor *belg* harvests earlier in the year in *belg*-dependent *woredas* in South Wollo), some households will continue to require food assistance. Most needs are covered under the PSNP. Renewed efforts by regional and local government officials are being made to encourage resettlement among populations in areas of chronic food insecurity.

Oromiya. In contrast to the very positive conditions in the west and in the surplus areas of Arsi and Bale, food aid needs remain due to poor crop production in most lowlands of the region, mainly in East and West Hararghe, Arsi, Bale and East Shewa Zones, due to unfavourable weather conditions experienced during the *meher* season. This follows poor harvests during the *belg* season. Rate of wage labour has generally

declined due to high supply and petty trading possibilities have been limited. Food security in much of East and West Hararghe has been affected in recent years due to the combination of land degradation, unchecked population growth and seasonal shortage of rainfall. The lowlands and dry mid-lands of these two zones have been particularly badly affected by several consecutive seasons of poor rains, with poor performance of both crops and livestock increasing the vulnerability of the community to critical food shortages. There have been several reports of high levels of malnutrition related to food insecurity. High numbers of beneficiaries are listed for both the Safety Net programme and emergency food aid.

SNNPR. The failure of the 2004 *belg* crops in this highly *belg*-dependent region resulted in the further deterioration of an already poor food security situation that has prevailed in the region in recent years, exacerbated by an extremely high population density in some zones. The *belg* failure forced nearly 1.4 million people to depend on external food aid assistance between August and the end of the year (compared to 873 800 beneficiaries for the first half of 2004). The food aid operation has contained the serious food shortage in the region, and a promising *meher* production will improve the overall food security situation in much of the region in the coming year. However, lowland and dry midland areas have suffered from the poor performance of the rainy season, and significant crop loss has been recorded in the lowlands of Gamo Gofa Zone and Konso, Burji and Dirashe special *woredas*. Seriously affected areas in the region need assistance during the first half of 2005 until they produce a harvest in the next *belg* season.

Gambella. Both man-made and natural calamities have affected the food security situation in the region. The interruption of agricultural activities due to security problems together with poor rains have resulted in some emergency needs.

Benshangul Gumuz. With a normal meher season, the overall food security prospect in the region for 2005 is better than in previous years. There are no emergency food requirements, and as there are no chronic needs in the region, no Safety Net beneficiaries.

Dire Dawa and Harari. In both Dire Dawa and Harari harvest prospects are not sufficient to cover the needs of the rural population. The Safety Net programme is expected to cover all requirements in Harari region, and about half of the requirements in Dire Dawa. Some additional needs in lowland parts of Dire Dawa will be under the emergency programme.

Afar. The late onset and early withdrawal of the *karma* rain (*meher* rain) in most parts of the region has had serious consequences for pastoralists in Afar Region, especially in northern zones. The performance of the rains was in general below average in most parts of the region. The rains improved the availability of water for both human and livestock consumption in Zone 3 and Zone 5, but in other zones, water remains critical. Similarly, rains in 2004 have had no notable impact on the improvement of pasture in most parts of the Region. While there was improvement in browse in some areas, pasture for sheep and cattle remains critical particularly in Zones 1, 2 and 4. The livestock physical condition, especially cattle, was reported to be either poor or deteriorating in most parts of the Region due to scarcity or lack of pasture. Productivity in terms of milk has significantly declined from what is normally expected at this time of year. Thus pastoralist livelihoods, based on their animals, are severely affected, and nutritional status especially among young children is expected to deteriorate. The poor *karma* rains follow inadequate 2004 *sugum* (*belg*) rains. Livestock migration has started abnormally early and it was reported that in some areas animals have started dying, often due to drought related diseases. Conditions are expected to become alarming if the short *dadaa* rains fail in December. All food aid needs in Afar Region will be covered by the emergency programme until the Safety Net programme is put in place later in 2005.

Somali. Overall, Somali Region received close to normal *deyr* rains with significant exceptions in some *woredas* like East Imi and Danan in Gode Zone; West Imi in Afder Zone; Sheygosh in Korahe Zone; Gashamo and Aware in Dagahbur Zone; Dembal in Shinille Zone; Sagag, Garbo and Duhun in Fik Zone; and Bokh and Geladi in Warder Zone, where the rains either came very late or were poor. In most of these *woredas*, livestock died during the last dry *hagaa* season (mainly young stock, milking cows, and sheep) and the *deyr* rains were poor in distribution and amount. Following the *deyr* rains, livestock are recovering from the severe dry *hagaa* season, but milk production as of late November was still very low and milk prices were high. Prices of animals are lower than normal in the southern seven *deyr* receiving zones, thereby negatively affecting purchasing power of many pastoralists, though livestock prices in Jijigga and Shinille Zones are good. Water availability has improved except in areas that have chronic water problems or which received poor rains. Given the cumulative effects of past stress (due to the previous poor *gu* and *deyr* rains), and the serious situation facing areas of poor *deyr* rains this season, the region faces poor food security prospects during the dry *jilaal* season (which does not end until the *gu* rains in March/April), and will continue to have

serious food shortfalls that will need to be met through food aid assistance. Of special concern are the affected *woredas* in Fik Zone. As in Afar Region, all food aid needs will be covered under the emergency programme until the Safety Net programme can be put in place later in 2005.

Borena and Guji Zones and Bale lowlands of Oromiya Region. In 2004 the *hagaya* rains started on time in mid-September in most parts of Borena and Guji Zones, but late onset was reported in parts of Dire, Arero and Teltele *woredas* in Borena Zone and most parts of Liben *woreda* in Guji Zone. The rains were erratic at the start with an interruption between late-September and early-October, but restarted in mid-October, after which the distribution and amount improved significantly. However in Teltele and Liben *woredas* the *hagaya* rains remained inadequate. The 2004 *gena* rains, the most important rains of the year (falling between mid-March and mid-May), were also poor in many *woredas* of both Borena and Guji Zones. Availability of water and pasture (particularly browse) is good in most areas except for Teltele and Liben *woredas*. However, due to the poor *gena* rains earlier in the year, grazing for cattle remains critically low in most lowland areas. The poor *gena* rains have also meant that livestock physical condition and milk production are much below normal. Significant numbers of cattle and calves reportedly died due to the harsh dry spell that followed the poor *gena* season. Annual grain production is dependent on the *gena* rains (70-80 percent of the total production). The *gena* crop (mainly maize) almost entirely failed in Dire, Moyale, Arero and Teltele *woredas* of Borena Zone, and Liben *woreda* of Guji Zone. Thus cereal supply in the two zones is very low. In Borena Zone, the build-up of herds over recent years mean that high numbers of animals are putting pressure on limited pasture and water. In the Bale lowlands, livestock are reported to be in normal condition and livestock prices have increased compared to the usual prices at this time of year, attributed to high demand from meat processing plants. Rain, though erratic and inadequate, helped good regrowth of bushes and trees in lowlands, and thus there is good browse. However, due to recurrent drought and critical moisture shortage, grasses have been depleted and feed scarcity is anticipated. Poor supply of milk is reported, a result of the death of cows and calves due to the failed *gena* rains. Very poor harvests are expected. Most needs in Borena and Guji Zones and the Bale lowlands are covered under the Safety Net programme.

South Omo Zone of SNNPR. The short rains normally received between September and October were delayed by more than one month in 2004. Since the more important *belg* rains (March-May) were also poor, and no rain was received in the June-September season, the impact of this delay was significant. Before the current rains started in October, pasture and water availability and quality had reached critically low levels. Livestock became very weak and many migrated to Mago Park and around Lake Turkana in search of pasture and water. As of late November/early December, except in some wet agro-pastoral areas and parts of the pastoral areas which received the late rains, there is still a serious shortage of pasture for livestock and livestock remain weak, as recovery requires sufficient rainfall and significant improvement in pasture and water. The population largely depends on milk and blood from livestock for food, while honey sales normally provide additional income; all these are very scarce due to the poor rains. In South Omo, crops have largely failed in 2004 due to the absence of floods from the Weito, Omo and Kibish, which normally allow for flood recession farming. Area planted along River Omo in Kuraz *woreda* was only 10 percent of the normal. Grain prices have increased as much as tenfold the normal price at this time as a result of poor supply, while cattle prices have declined dramatically due to huge distress sales of livestock, affecting terms of trade for the pastoralists. The situation in Hamer *woreda* is reported to be alarming.

5.3.4 Health and nutritional status

Review of the nutrition situation in 2004

Since its establishment in November 2000 under the early warning department (EWD) of the Disaster Prevention and Preparedness Commission (DPPC), the Emergency Nutrition Coordination Unit (ENCU) has been involved in the review and standardization of guidelines for emergency nutrition assessments/surveys and nutrition interventions and has contributed to the compilation of nutrition surveys, amongst other activities. The survey information used in this section has been obtained from the ENCU database.

Though nutrition surveys are not representative as they were not undertaken throughout the country, they do indicate that childhood malnutrition remains a major concern. In 2004, a total of 59 standard cluster nutrition surveys were conducted by the Government and NGOs throughout the country, mostly in worst affected (as established by DPPC/ENCU progress reports) *woredas* in the following regions: Oromiya Region (26 surveys); SNNPR (16); Amhara Region (4); Tigray Region (4); Somali Region (8); and Afar Region (1). The national average of all the nutrition surveys conducted indicates, in weight for height (WFH) Z-scores, Global Acute Malnutrition (GAM) of 9.6 percent and Severe Acute Malnutrition (SAM) of 0.9 percent, not significantly different compared to the national average of 2003 (GAM 9.2 percent) but much lower compared to 2002

(GAM 15.1 percent). This 2004 result of 9.6 percent GAM alone with aggravating factors is considered "poor" according to the National Guideline.[12] The regional averages range from GAM 7.3 percent for Tigray Region to GAM 11.9 percent for Amhara Region. Nevertheless, there is variation in the individual survey results and the highest prevalence of GAM recorded during the year by region are as follows: Golo Oda *woreda* of East Hararghe in Oromiya Region 19.4 percent; Offa *woreda* of Wolaita Zone in SNNPR 13.4 percent; Tenta *woreda* of South Wollo Zone in Amhara Region 15.0 percent; Gode *woreda* in Somali Region 21.4 percent; Abergele *woreda* of Central Zone in Tigray Region 8.0 percent and Zone 3 of Afar Region 10.2 percent. In SNNPR, where very poor nutritional levels were reported in 2003, the general nutritional status in 2004 was within acceptable standards except in Mareko *woreda* of Gurage Zone and Gibe *woreda* of Hadiya Zone (GAM 10.3 percent and 11.7 percent respectively). Overall, 9.4 percent of the surveys results (5 surveys) showed GAM >15 percent compared to 10 percent in 2003, and 26.4 percent (14 surveys) showed GAM between 10 and 15 percent, compared to 28 percent the previous year.

The national average for Crude Mortality Rate (CMR) and Under Five Mortality Rate (U5MR), expressed as deaths/10,000 people/day, was below 1.0 and 2.0 respectively for most areas. The regional average for CMR was also below 1.0 for all regions and U5MR below 2.0 except for Gode (2.0) and Afar (2.2). The highest recorded CMR during the year is 1.2 deaths/10,000/day in East Hararghe Zone in Oromiya Region and Gode Zone in Somali Region. The U5MR was highest, 3.8 deaths/10,000/day, in Gode Zone in Somali Region, and 3.1 deaths/10,000/day in East Hararghe Zone in Oromiya Region and Kembata Timbaro special *woreda* in SNNPR. CMR of 1-2 deaths/10,000 people/day and U5MR of 2-4 deaths/10,000 people/day are considered serious according to the national and international standards. The results show that despite considerable improvement in nutritional status in most areas surveyed, there are areas with still unacceptably high levels of malnutrition and death.

Current and planned nutritional interventions

Since March 2004, as part of a wider joint WFP/UNICEF/Government of Ethiopia programme, the implementing of the Enhanced Outreach Strategy (EOS) for Child Survival Interventions (CSI) in the most food insecure and drought affected *woredas* was started in the country, with a targeted supplementary food component to malnourished children, and pregnant and lactating mothers. An integral part of the food component is the development and dissemination of nutrition education materials. These materials are designed to complement and strengthen nutrition activities in the health sector. Overall, the EOS project has significant potential to improve beneficiary targeting of supplementary food through the compilation of 'malnourished registers' by *woreda*.

Initially, the CSI started in SNNPR, in 49 chronically food insecure *woredas*. The overall objective of the initiative is to reduce mortality and morbidity in children under 5 years of age and pregnant and lactating mothers in chronically food insecure areas.

In the initial phase of the project, screening was conducted in 13 affected *woredas* of SNNPR and the coverage was 74 percent with 5.5 percent of the children, 6-59 months, found to be suffering from acute malnutrition (below 80 weight-for-height percent of the median) and 1.8 percent from acute severe malnutrition (below 70 weight-for-height percent of the median). In the second phase 39 *woredas* were covered and the overall coverage was 90.2 percent; 6 percent of the children screened were found with acute malnutrition and 0.02 percent with severe acute malnutrition. With regard to the pregnant and lactating mothers, 18 percent were found moderately malnourished with MUAC (Mid-Upper-Arm Circumference) below 21 cm in phase one and 23 percent in phase two. Nevertheless, moderate malnutrition as high as above 40 percent was noted in about 7 of the project *woredas*

Through the food component of the CSI, every three months, WFP/DPPC provides supplementary food rations to all children under five years of age, and pregnant and lactating mothers identified as malnourished. The main objective of the targeted supplementary feeding component of the EOS is to contribute to improving the nutrition and health status of children and pregnant and lactating women through provision of supplementary food (fortified blended food and vegetable oil) and nutrition education (e.g. concerning the importance of breast feeding), as part of Essential Nutrition Actions (ENAs). In SNNPR, 106 000 children under the age of five and pregnant and lactating mothers are receiving supplementary food.

Based on the SNNPR experience, preparations for the expansion of the EOS to the other regions in the country (Oromiya, Tigray, Amhara, Somali, Dire Dawa and Harari) started in October 2004. In 2005, the EOS will target 6.8 million children aged 6 to 59 months in more than 320 drought-affected *woredas* (emergency

[12] Guideline on Emergency Nutrition Assessment (DPPC/Early Warning Department, December, 2002).

and Safety Net *woredas*) of the country. It is estimated that around 700 000 malnourished children and 300 000 pregnant and lactating mothers will require supplementary feeding in 2005 under the EOS.

5.3.5 Estimation of population in need of emergency food aid and requirements in 2005

In 2005, a total of 2 182 000 people will require emergency food assistance. Emergency food requirements are 387 482 tonnes. In addition, 76 661 tonnes of fortified blended food and 12 266 tonnes of vegetable oil are required for targeted supplementary food distributions under the EOS/Child Survival programme. As described earlier, the Productive Safety Net Programme is eventually expected to reach 5 million chronically food insecure people in 2005, with food and cash assistance. The emergency food requirements are based on the assumption that the 2005 *belg* season and the main rainfall season in the pastoral areas will be normal. Requirements may be revised following the mid-year assessment in *belg* cropping areas and pastoral areas, if *belg* or *gu* rains are poor.

Table 13 below summarizes the number of people expected to require emergency food assistance in each region and the food needs by commodity type. Table 14 compares needs in 2005 to those in 2004 and 2003.

Table 13 - Beneficiaries and emergency food requirements 2005 (in tonnes)[1/]

Region	Emergency beneficiaries	Cereals	Pulses	Vegetable oil	Blended food	Total
Afar	207 025	41 140	4 114	1 234	4 320	50 808
Amhara	114 610	12 599	1 260	378	1 323	15 560
Benshangul Gumuz	-	-	-	-	-	-
Dire Dawa	38 454	4 038	404	121	424	4 987
Gambella	49 500	4 455	446	134	468	5 502
Harari	-	-	-	-	-	-
Oromiya	500 004	54 357	5 436	1 631	5 707	67 131
SNNP	325 998	31 592	3 159	948	3 317	39 016
Somali	557 861	111 673	11 167	3 350	11 726	137 916
Tigray	388 646	53 897	5 390	1 617	5 659	66 563
Sub-Total	**2 182 098**	**313 751**	**31 375**	**9 413**	**32 944**	**387 482**
Targeted supplementary feeding programme	-	-	-	12 266	76 661	88 927
Total	**2 182 098**	**313 751**	**31 375**	**21 679**	**109 605**	**476 409**

1/ Food requirements for Safety Net beneficiaries in Afar Region (250 100 beneficiaries) and Somali Region (683 000 beneficiaries), a total of 933 100 beneficiaries, are included under emergency food requirements for these two regions in 2005 in this table. Beneficiaries under Targeted Supplementary Feeding programme (EOS/Child Survival Interventions) are expected to be 700 000 children under five and 300 000 pregnant and lactating women, all from among the emergency programme beneficiaries and Safety Net beneficiaries.

Table 14 - Emergency and safety net beneficiaries 2005 compared to recent years

Region	Rural population 2005	2005			2004	2003
		Safety Net beneficiaries[1/]	Emergency beneficiaries	Total beneficiaries	Emergency beneficiaries[2/]	Emergency beneficiaries[3/]
Afar	1 238 873	250 087	207 025	457 112	402 400	786 200
Amhara	16 453 069	1 572 442	114 610	1 687 052	2 000 000	3 313 300
B. Gumuz	539 046	-	-	-	-	-
Dire Dawa	105 955	41 546	38 454	80 000	73 200	91 500
Gambella	173 704	-	49 500	49 500	34 800	58 400
Harari	77 687	13 579	-	13 579	13 500	20 000
Oromiya	22 382 411	964 945	500 004	1 464 949	1 754 300	3 786 700
SNNP	12 900 174	760 450	325 998	1 086 448	873 700	1 442 700
Somali	3 342 477	682 945	557 861	1 240 806	1 120 100	1 115 200
Tigray	3 491 020	850 304	388 646	1 238 950	1 122 000	2 033 700
Total	**60 704 416**	**5 136 298**	**2 182 098**	**7 318 396**	**7 394 000**	**12 647 700**

1/ 2005 Safety Net beneficiary figures as per Programme Implementation Manual, Dec 2005, Govt of Ethiopia, MoARD - may be adjusted; as above, Afar and Somali Region Safety Net beneficiaries are under the emergency programme for the first half of 2005.
2/ 2004 figures are original target beneficiaries under 2004 Humanitarian Appeal with some adjusted for *belg*/*gu*. Original total estimate was 7.2 million. As some additional people were added as beneficiaries for August-December who had not been on the lists in the early part of the year, the total number receiving assistance in 2004 has been reported as 7.8 million people.
3/ 2003 figures as of Aug 2003 - amalgamated, with highest figures per region during the year. Original total estimate was 11.3 million.

5.3.6 Food basket

The general ration for emergency feeding is 15 kg of cereals (per person per month or pppm) 1.5 kg of pulses pppm and 0.45 kg of vegetable oil pppm. The general ration supplies around 2000 kcal/person/day. The duration of emergency assistance in 2005 for beneficiaries varies, averaging 7 months. Micronutrient-fortified blended food for supplementary rations will continue as take-home “blanket” distributions to particularly vulnerable groups. Where possible, these will be targeted by nutrition screening of individual children under-5, pregnant women and lactating mothers through the Extended Outreach Strategy (EOS), as discussed above, under Health and nutritional status section. In 2005, for this targeted supplementary feeding programme, food requirements are 76 661 tonnes of fortified blended food and 12 266 tonnes of vegetable oil.

5.3.7 Local purchases

Between 2000-04, an average of 190 000 tonnes of cereals, pulses and blended food was locally purchased in Ethiopia for humanitarian operations. The availability of cereals for local purchase in 2005 is expected to be substantial due to the good harvests in the west and central parts of the country, and will be assessed by the "Cereal Availability Study” early in 2005. The study will take into account the cash transfers for safety net beneficiaries, which will largely be used for household food purchase. Production capacity for micronutrient-fortified blended foods (locally known as “famix” or “faffa”) is now more than 200 tonnes/day. Local purchases are normally subject to prices at most being equivalent to import parity price and should also meet schedules for timely distributions or repayment obligations to the EFSR.

Table 15 - Local purchases for humanitarian operations in recent years in Ethiopia (tonnes), by WFP, NGOs and Government

Year	Cereals	Pulses	Vegetable oil	Blended food	Miscellaneous	Total
2000	206 211	10 897	376	10 560	-	228 044
2001	234 373	7 059	-	5 640	540	247 612
2002	96 972	2 113	-	4 370	400	103 855
2003	181 785	2 566	-	12 622	609	197 582
2004	169 403	5 714	2 413	6 912	283	184 725
Total[1/]	**888 744**	**28 349**	**2 789**	**40 104**	**1 832**	**961 818**
Average	**177 749**	**5 670**	**558**	**8 021**	**366**	**192 364**

1/ WFP share of local purchases: 32 percent of cereals; 87 percent of pulses; 58 percent of blended food; 94 percent of miscellaneous; 35 percent of total.

5.3.8 Emergency Food Security Reserve (EFSR)

Ethiopia's Emergency Food Security Reserve will remain a key facility to overcome the time-lag for delivery of food assistance, and will also be used for food-supported Safety Net activities where necessary. The EFSR's total stock is 405 000 tonnes. The physical stock for the EFSR beginning 2005 is estimated to be 242 000 tonnes. Repayments to the Reserve should keep to agreed schedules in order to allow for further loans and keep the Reserve above its minimum operational level of 100 000 tonnes.

5.3.9 Logistics

Ports, overland transport, warehousing and inland transport: For imported food, Djibouti will be the major port, though Berbera in northern Somalia can also be used. In 2004, Djibouti handled 580 000 tonnes of food aid (in 2003, Djibouti proved able to handle over 5 000 tonnes of relief food/day and averaged 130 000 tonnes/month). If good coordination is maintained, including transport of food for the PSNP, there is adequate road and rail transport capacity between port and warehouses. The DPPC and EFSR have adequate warehouse space to receive and promptly offload relief cargo. Where required, DPPC can lease additional commercial storage. WFP will continue HIV/AIDS awareness training for 3 000 transport workers.

5.3.10 Implementation

Emergency programme vs. PSNP implementation: Recognising the ongoing process related to the loss of natural resource base and chronic nature of vulnerability resulting in widespread food insecurity, Ethiopia has been focusing its efforts on improving long-term food and livelihood security for chronically food insecure citizens through various food security programmes of the "New Coalition for Food and Livelihood Security in Ethiopia". Ethiopia's new food security strategy has brought about changes in government structures, placing the Food Security Coordination Bureau (FSCB) within the Ministry of Agriculture and Rural Development (MoARD) at the centre of all food security matters. At the regional level, some Food Security and Disaster Prevention and Preparedness Bureaux have been merged and operate under the umbrella of the Bureau of Agriculture and Rural Development (BoARD). The emergency food aid programme will be managed by the DPPC (which is also under the MoARD), whose primary mandate is to respond to the food and other basic needs of people affected by acute, unpredictable disasters. The Productive Safety Net Programme is to be implemented by the FSCB. The DPPC will also provide logistics support for delivery of food within the PSNP. WFP contributes to both the emergency food needs and the Safety Net programme under the new WFP Protracted Relief and Recovery Operation, (PRRO 10362.0 "Enabling Livelihood Protection and Promotion") for 2005-07. NGOs will implement the PSNP in certain *woredas*. As in previous years, resources for emergency food operations will be mobilised through bilateral donor contributions to the DPPC and contributions channelled through WFP or NGOs.

Risks and contingencies for unexpected changes in the situation during 2005: With the introduction of the PSNP, there is a move away from the "traditional" way of managing chronic or predictable food needs. While this change has long been required, it is foreseen that the transition period will contain some risk. Changes in line ministry responsibility, the move towards cash, the challenges at the local level of differentiating between chronic and acute need, and the level of preparedness in pastoral areas, remain some of the critical risks. Within the PSNP a rapid response mechanism is being designed to resolve problems related to the new division of responsibilities. The ability to increase cash payments or switch from cash to food will help mitigate the first two risks.

Coordination: Relief food agencies will coordinate emergency food distribution activities based on the national requirements disaggregated to *woreda*-level. The coordination body is the DPPC and the Food Aid Task Force (DPPC, WFP, NGOs and donors) reviews the relief food situation regularly. The DPPC will continue to coordinate efforts to provide accurate and timely information on emergency operations and early warning to donors and partner agencies. In order to ensure proper utilization of resource, DPPC and the FSCB will be working closely and coordinate emergency and PSNP activities. This coordination will be critical for addressing targeting issues and to ensure that no households fall through the cracks. WFP will continue to host its regular Logistics and Procurement coordination meetings in Addis Ababa, which are attended by donors, NGOs and government officials. The meetings allow information-sharing among agencies making local purchases of cereals and other commodities, and focus on procurement planning (to avoid all buyers entering the market at the same time), availability and price variation, problems with suppliers such as delays in delivery, new suppliers on the market and issues of food quality. The UN Strategic Disaster Management Team, comprising WFP, UNICEF, WHO, FAO, UNDP, World Bank, and

OCHA, serves as the key instrument for coordination of the UN humanitarian response. These agencies will work together to support federal, regional and sub-regional coordination structures in 2005.

Distribution: For emergency food, DPPC and regional authorities determine food allocation plans by *woreda*, based on assessed requirements. When resources are inadequate, prioritisation may be necessary on the basis of current early warning data. Relief agencies may borrow cereals from the EFSR against guarantee of a repayment. A well-established coordination system is in place for DPPC, WFP, NGOs and the EFSR for food receipts, dispatches, loan withdrawals and repayments. Donors normally make provision for costs for transport, storage and handling to final food distribution points. Commercial transporters are contracted for primary and secondary transportation. *Woreda* committees, composed of community members and local officials, manage food distribution to beneficiaries after kebeles/peasant associations have targeted the households. Emergency food will be provided where possible through food-for-assets activities to able-bodied beneficiaries but where affected households are unable to participate in food-for-work, rations will be provided "free" to targeted populations. Distribution details for the Productive Safety Net Programme are described in the Programme Implementation Manual of the PSNP.

Targeting: Geographical targeting of emergency food is based on the multi-agency assessment, which identifies (approximately) the number of people and duration of assistance for each *woreda*. The allocation to the *woreda* is targeted at community level to the most vulnerable households. Household targeting involves direct participation of community. Nutritional surveys assist in targeting of supplementary food. National Food Aid Targeting Guidelines were developed by the DPPC and international partners and first issued in 2000. DPPC and partners continue training efforts in the application of the guidelines and these guidelines have been adapted for the Safety Net programme. Specific targeting guidelines also need to be developed for pastoral areas taking into account their particular livelihoods.

Monitoring and evaluation: The emergency food response in 2005 will be monitored by DPPC, jointly with FSCB for distributions under the Safety Net in relevant *woredas*, to ensure timely, coherent and coordinated action. This includes overseeing humanitarian activities, tracking emergency contributions, managing early warning information and organising annual assessments. Both Federal and Regional DPPCs will continue to monitor the food security situation regularly and retain a capacity to mobilise Disaster Assessment Teams at short notice in order to confirm information concerning rapidly deteriorating situations in specific localities. Their assessments can be used to make adjustments to the emergency response. In addition mid-*belg*, pre-harvest *belg* and *gu* and mid-*meher* multi-agency assessments will be conducted and revisions to the 2005 needs made as appropriate. The commodity tracking system of WFP/DPPC will continue to monitor and report on food dispatches from port to warehouses and distribution sites. DPPC and WFP compare food allocations against requirements and allocations against dispatches by *woreda* (including NGO and bilaterals). Relief agencies undertake periodic food utilisation studies, complementing the regular post-distribution monitoring by DPPC and relief agencies sub-offices.

Non-food: Following the largely successful emergency response in 2003 and despite development efforts of the Government and its partners, there has been a recognition that droughts generate a number of food and non-food needs which need to be addressed together to ensure the most effective response. People burdened by drought endure crop failure and resulting food gaps, but they are also affected by livestock disease, seed shortages, malaria outbreaks etc. A failure to address non-food needs results in heightened morbidity and mortality despite the food response and can have long term consequences on people's livelihoods. The 2005 Humanitarian Appeal describes the major non-food needs.

This report has been prepared by W.I. Robinson and L. Lachaal and Deborah Hicks, under the responsibility of the FAO and WFP Secretariats with information from official and other sources. Since conditions may change rapidly, please contact the undersigned for further information if required.

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