WFP
World Food Programme

SAVING LIVES
CHANGING LIVES

FOOD AND NUTRITION SECURITY UPDATE

KEY MESSAGE

With the onset of the Meher harvest in October 2024, there has been a significant reduction in the population requiring food assistance (PIN), decreasing from approximately 12 million individuals during the lean season from July to September to around 5.5 million between October and December. Internally Displaced Persons (IDPs) and returnees constitute about 67 percent of this PIN, highlighting their vulnerability within affected communities across various regions. The assessment conducted for the 2024 Belg season indicates that some of the most severely food insecure woredas—classified as phases four and five on the Integrated Food Security Phase Classification scale—are predominantly located in Afar, Somali, and Oromia regions.

The Meher harvest plays a pivotal role in the country's agricultural landscape, accounting for approximately 90 percent of annual crop production and significantly enhancing food access for smallholder farmers while bolstering market availability[1]. According to data from the Ministry of Agriculture (MoA), most regions have successfully cultivated nearly all planned areas; however, it is noteworthy that the Tigray region has only managed to plant around half of its intended areas. Furthermore, MoA statistics indicate that crop planting in Tigray during 2024 was at about 75 percent compared to levels recorded in the 2019/20 season reported by the Central Statistics Agency[2]. Additionally, households in various regions grappling with localized weather adversities are expected to face diminished crop yields this season, further complicating their food security and economic stability.

There has been a noticeable decline in vegetation in most parts of the Somali region and pastoral zones within southern Oromia. Should the forecast for below-normal rainfall during the remainder of the October to December rainy season materialize, this deterioration is expected to intensify. Such adverse developments may undermine previous gains achieved through above-average rainfall seasons that had improved grazing availability. Consequently, food security could significantly worsen throughout the extended dry period projected from January to March 2025. Additionally, northern Afar continues to face widespread food insecurity exacerbated by multiple factors: droughts observed between June and September 2023, flooding events from April to May 2024, and diminished livestock populations resulting from regional conflicts further complicate recovery efforts.

The annual inflation rate in Ethiopia has demonstrated a notable downward trend, decreasing from 29.4% in January to 17.2% by August 2024; however, it experienced a modest increase to 17.5% in September, primarily attributed to rising food prices within the consumer price index. This uptick highlights ongoing pressures on household budgets amid broader economic reforms that aim to foster market liberalization and fiscal adjustments by the government intended to stimulate growth. While these reforms hold potential for long-term benefits, they also present immediate challenges for many low-income households who may struggle with heightened living costs during this transition period.

Despite recent stability in grain prices, current price levels remain elevated compared to the previous year and the five-year average. The anticipated Meher harvest may contribute to sustaining these high price points; however food costs are expected to persist at challenging levels, disproportionately affecting poorer households that depend significantly on

[1]DRM Agricultural Task Force Monthly cluster meeting, October 3, 2024, Addis Ababa
[2]Central Statistical Agency, Agricultural Sample Survey: Report on Area and Production on major crops, Meher season, April 2021.

market purchases. In southern pastoral areas, a concerning trend has emerged as terms of trade have begun declining following a period of recovery from successive droughts experienced between 2020 and 2022. This deterioration creates further obstacles to food security within these communities. Additionally, ongoing armed conflict—particularly in regions such as Amhara and Oromia—exacerbate the crisis by disrupting agricultural production and access to essential resources.

The resources allocated for Humanitarian Food Assistance (HFA) have proven insufficient, compelling the World Food Programme (WFP) and its partners to implement stringent prioritization measures among populations experiencing acute food insecurity. Priority has been given to households classified within Household Economy Analysis (HEA) phases 4 and 5 in specific Woredas, along with internally displaced persons residing in camps. Despite these targeted efforts, WFP reduced cereal ration sizes by 20 percent due to ongoing resource constraints. Unless additional funding is secured, projections indicate potential pipeline breaks affecting assistance from October 2024 through March 2025.. Without urgent intervention and increased resources dedicated to addressing humanitarian needs, there is a substantial risk that food security and nutritional outcomes will continue to deteriorate.

Wasting remains a critical public health concern in various regions according to World Health Organization (WHO) classifications. Notably, alarming rates of Global Acute Malnutrition (GAM) have been reported from SMART surveys in several agropastoral zones; for instance, the Deghabur Agropastoral zone exhibits a GAM rate of 16.2%, while the Jijiga Agropastoral zone follows closely at 16.5%. The Teru livelihood zone presents an even more concerning figure at 19.4%. Furthermore, both the Wag Himra zone in Amhara and the Asale livelihood zone in Afar demonstrate elevated levels of acute malnutrition, with GAM rates ranging from greater than or equal to 10% but less than 15%. In contrast, moderate occurrences are observed within Oromia's Arsi region and Gidan woreda alongside South Wello's lowland sorghum-cattle livelihoods area within Amhara province, where GAM levels fluctuate between 5% and under 10%. These findings underscore the urgent need for targeted interventions to mitigate this nutritional crisis across affected areas.

In summary, despite some improvements due to the onset of the main harvest in October, high levels of food insecurity and acute malnutrition are expected to persist.

1. FOOD SECURITY OVERVIEW

As per the Belg season assessment and IDP estimates, the Ethiopian Disaster Risk Management Commission (EDRMC), in collaboration with humanitarian partners, projected that approximately 5.5 million individuals will require humanitarian food assistance (HFA) from October to December 2024. This is a decreasing from approximately 12 million individuals during the lean season from July to September. Notably, around 67% of those estimated to be acutely food insecure are Internally Displaced Persons (IDPs) and returnees who have been significantly impacted by ongoing crises throughout the country. Figure 1 shows the geographic distribution of IDPs and the acutely food insecure non-displaced population.

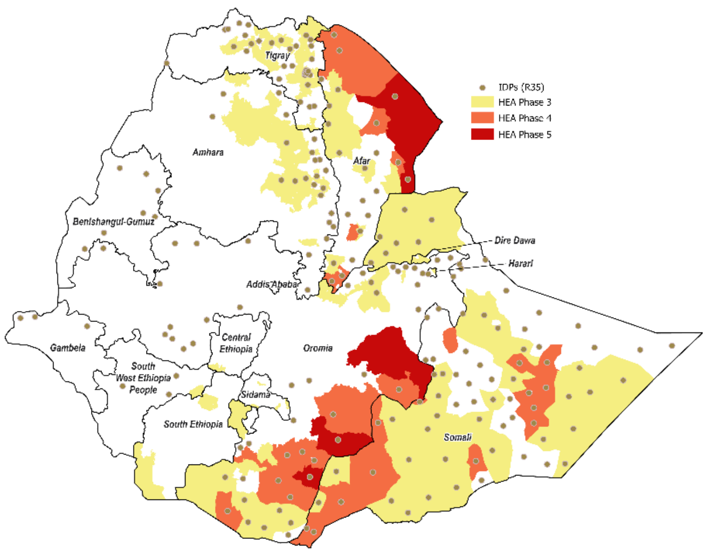

Figure 1: Acute Food Insecure Woredas (Belg Assessment) and IDPs

Due to resource constraints, the EDRMC and its partners have had to prioritize food aid for about 2.3 million people during this period; this group includes roughly 1.7 million IDPs residing in camps as well as an estimated 620,000 non-displaced individuals located within high-risk areas classified under Humanitarian Emergency Access phases four and five across Afar, Somali, and Oromia regions—each region receiving support for about 200,000 beneficiaries respectively. Despite these efforts at prioritization aimed at addressing acute food insecurity effectively amid limited resources, the World Food Programme was compelled to implement a reduction of cereal rations by twenty percent—a stark reflection of the prevailing challenges faced in delivering adequate relief amidst growing needs.

In 2024, the EDRMC and its humanitarian partners demonstrated a significant capacity to deliver food assistance across various regions. From January to March, they successfully reached 57 percent of the targeted population; this figure increased to 64 percent between April and June, ultimately achieving an impressive reach of 71 percent from July to September. Notably, certain regions reported higher proportions of individuals receiving aid than initially projected targets. However, it is important to highlight that no food assistance was provided in Sidama, Gambella, and Harari regions during this period. (Figure 2).

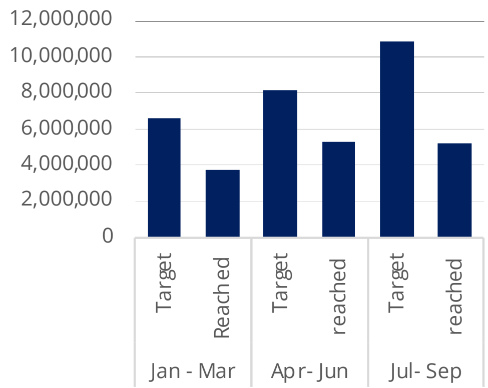

Figure 2: Number of people reached with food Assistance compared to Target, 2024

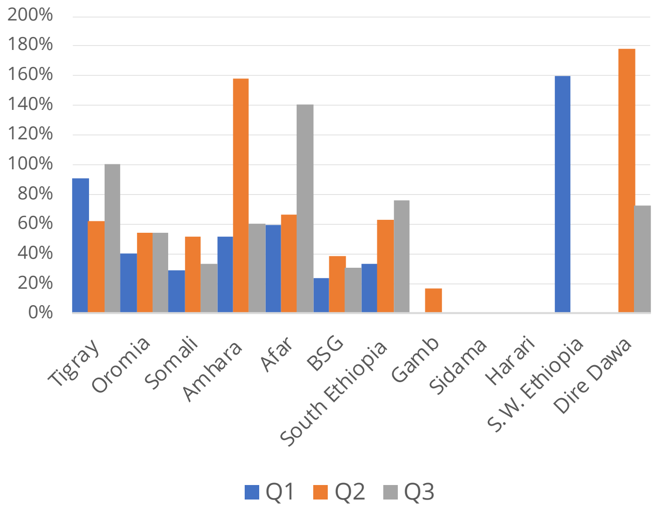

Figure 3: Percentage of targeted people reached with food assistance

Refugees: Ethiopia continues to host over one million refugees and asylum seekers. A substantial portion of this refugee population originates from South Sudan and Somalia, with children aged 0 to 17 years constituting approximately 56.5 percent of all refugees in the country. According to a September 30, 2024, report by UNHCR, there has been a notable increase in Sudanese refugees within Ethiopia's borders, now totalling around 91,000 individuals. This influx underscores humanitarian needs and highlights the complexities involved in addressing both general population requirements and those specific to internally displaced persons (IDPs) amid an already strained resource environment. As such, targeted interventions will ensure that vulnerable populations receive adequate support during these challenging times.

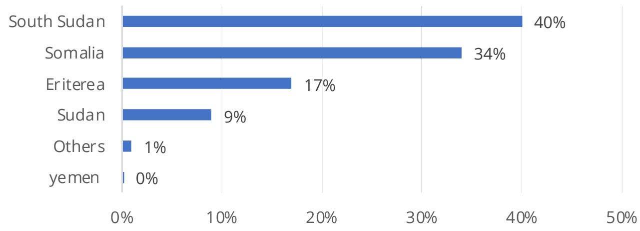

Figure 4: Refugees and Asylum Seekers by Country of Origin (%)

Source : UNHCR, Ethiopia Situation Dashboard as of September 30, 2024

In September 2024, the World Food Programme (WFP) successfully provided food assistance to 767,258 refugees; however, recipients received only 60 percent of the standard ration size due to prevailing resource shortages. In October, the WFP continued its support, ensuring that approximately 570,000 refugees received the assistance they needed. However, distribution efforts in Assosa refugee camps faced significant disruptions owing to security challenges.

Acute Malnutrition: The Mid Upper Arm Circumference (MUAC) results for August 2024 based on data from ENCU indicate alarmingly high rates of acute malnutrition among children under five, with proxy global acute malnutrition (GAM) rates surpassing the WHO emergency threshold of 15%. These rates align with findings from 19 SMART surveys conducted from January to July 2024 in various regions (Afar, Amhara, Oromia, Somali, Benishangul and Tigray). For instance, based on SMART+ surveys across different regions, high GAM levels (between 10% and 15%) were reported in the Wag Himra zone (Amhara) and Asale livelihood zone (Afar). Moderate GAM levels (5% to under 10%) were reported in the Arsi zone (Oromia), Gidan woreda, and South Wello's lowland sorghum-cattle livelihood zone (Amhara). Overall, these findings underscore the critical need for immediate intervention to address the ongoing nutritional crisis.

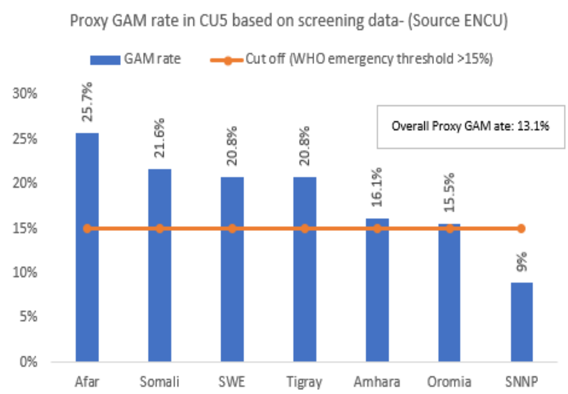

Figure 5: Proxy GAM rates in CU5 based on Screening Data (ENCU August 2024)

2. DRIVERS OF FOOD INSECURITY

Food security continues to be undermined by overlapping factors, including climate-related shocks, persistent conflict, inflationary pressures, and elevated food prices. Despite the 2024 rainy seasons—Belg from February to May and Meher from June to September—exhibiting normal to above-normal rainfall with generally favourable temporal and spatial distribution, adverse weather events such as floods, localized droughts, and landslides due to excessive precipitation have occurred. Concurrently, while there was a temporary decline in double-digit inflation rates earlier this year, they surged again in September alongside high food costs that further exacerbate access issues for vulnerable populations. Although many regions experienced either stable or decreased levels of conflict throughout 2024—including Oromia, where reported incidents slightly fell—they witnessed an alarming increase in violent episodes within Amhara since April 2023. These multifaceted challenges collectively impact agricultural productivity and threaten the stability of food systems across affected areas.

2.1 AGROCLIMATOLOGY

June to September 2024 rains: The June to September 2024 rainfall exhibited an overall positive impact on agricultural production throughout Ethiopia. Most areas in the country received normal to above normal rains, with very few pocket areas which received below normal rains (Figure 5)

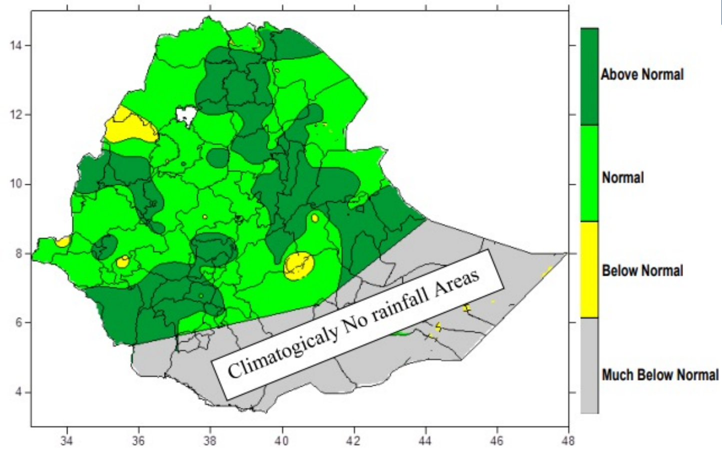

Figure 6: Percent of Normal Rainfall Kiremt (June -September) 2024, EMI

Notably, unseasonal precipitation persisted beyond mid-September into late October across the country's central, eastern, and northern parts, contrary to typical seasonal patterns documented by the Ethiopian Meteorological Institute (EMI). This prolonged rainfall may adversely affect harvesting activities related to mature crops that typically commence during this period while benefiting those still in their growth stages within areas like Benishangul-Gumuz, where maize and sorghum are harvested later in November or December.

These divergent effects highlight a complex interplay between climatic variability events that can negatively influence crop yield potential while providing essential moisture support under specific circumstances.

October to December 2024 rains: Forecasts indicated that the October to December (OND) 2024 rains will be below-average. These rains are the second rainfall season, vital for pastoral and agro-pastoral communities across southern and southeastern Ethiopia, including Somali, Oromia, and Southern Ethiopia regions.

Analysis of the rainfall performance from 01 -20 October 2024 using satellite rainfall estimates, shows up to 50% below normal rainfall for Somali region while other areas that benefit from the October to December rains received normal rains (figure 7)

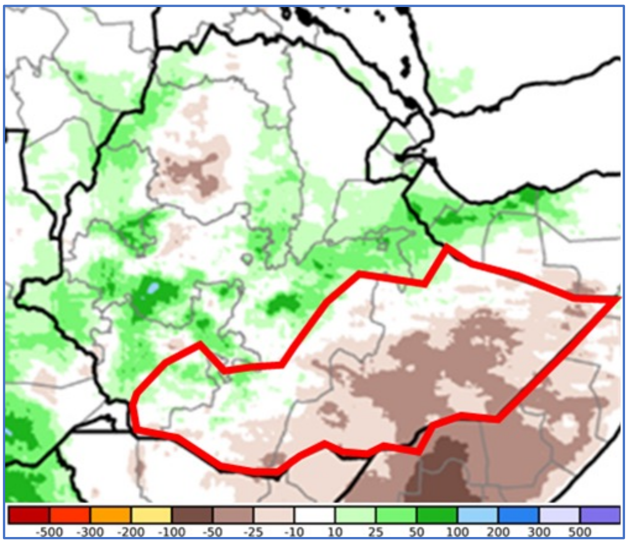

Figure 7: Precipitation Anomaly (mm) 01 Oct - 20 Oct 2024. Source (Climate Hazard Center)

2.2 CROP AND LIVESTOCK PRODUCTION

The Meher crop accounts for more than 90 percent of annual production and more than 90 percent of it is produced by smallholder farmers. According to the Ministry of Agriculture, with the overall good rains and better fertilizer distribution than last year, production is expected to be good at the national level. However, localized areas affected by adverse weather conditions in different regions are expected to have reduced production compared to what was planned.

Livestock body condition is generally good in pastoral and agrarian areas. Still, herd size in south and southeastern pastoral areas has not recovered 100 percent from the devasting impacts of the 2020-2022 droughts. In addition, due to the October to December 2024 forecasted below-normal rains, food and income access from livestock production is expected to be negatively affected. Vegetation greenness maps of the second ten days of October 2024 (Figure 7) show a slight decline in vegetation cover in pastoral areas.

Overall, livestock body condition is generally good in both pastoral and agricultural regions. However, herd sizes in the southern and southeastern pastoral areas have not fully recovered from the severe impacts of the droughts between 2020 and 2022. Furthermore, forecasts indicate below-normal rainfall from October to December 2024, which may adversely affect access to food and income derived from livestock production, particularly in the South and Southeastern parts of the country.

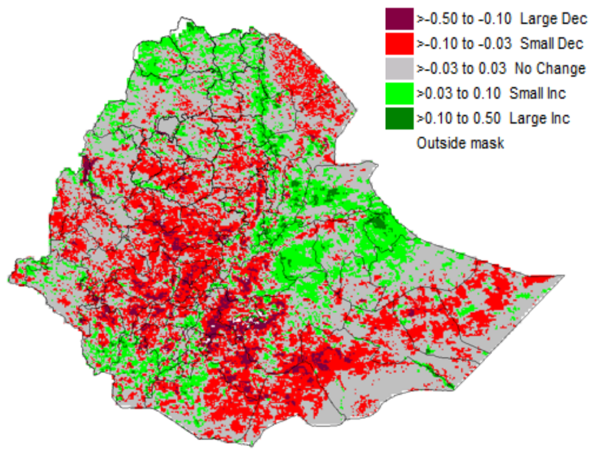

Figure 8: Vegetation Greenness (NDVI) in fraction - 2024 October 2nd dekad [Compared to Normal]

2.3 MARKETS AND MACROECONOMY

INFLATION

As of September 2024, annual headline inflation has risen to 17.5 percent, marking a marginal increase from the previous month's rate of 17.2 percent. This uptick is primarily attributed to a notable escalation in food inflation, which surged from 18.8 percent in August to 19.6 percent by September. Notably, between January and August of this year, there was a gradual decline in overall annual inflation rates. In response to mounting economic challenges over the past year, the government's stringent monetary policy measures have played an instrumental role in alleviating some aspects of these persistent inflationary trends that have recently been observed.

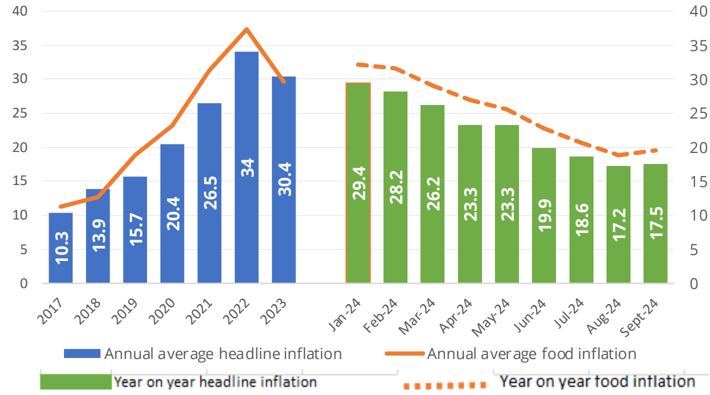

Figure 9: Trends in headline and Food inflation

MACRO-ECONOMIC REFORM

The Ethiopian government states that it has taken a number of measures to mitigate the negative impacts of the Forex liberalization and other macroeconomic reforms. The mitigation measures include control on essential commodities prices[3], prohibition on house rent increase[4], supply of cooking oil at subsidized price[5], opening Sunday markets for essential goods directly from the producers, reinstate fuel subsidy scheme that will be lifted over one year period[6], allow traders to import any goods except internal combustion engine automobiles and intelligence or security equipment[7]. The measures appear to have a mitigating effect on the possible high price rise on goods and services after the implementation of the liberalized exchange regime as mainly seasonal price increases are seen.

The gap between the official and parallel exchange rate, which was over 102 percent just before the floating exchange regime was introduced, closed to about 4 percent in August and September. However, the gap grew to 18 percent in October 2024, where the USD exchanged to 140 Birr in the parallel market, while in the official market the USD was on average exchanged for around 119 Birr. The spike in the parallel market's exchange rate signals a return to increased forex demand from the parallel market. The fast depreciation of the value of Birr in the parallel market has induced food price hike in Somali region, which is also dependent on imported food items such as wheat flour, pasta, rice and vegetable oil.

[3]https://addisfortune.news/ministry-intensifies-crackdown-on-price-gouging/
[4]https://www.thereporterethiopia.com/39471/
[5]https://allafrica.com/stories/202408270409.html
[6]https://allafrica.com/stories/202410090091.html
[7]The Franco Valuta scheme introduced in August 2024 was rolled back in November 2024

FUEL PRICE

According to a press statement by the Ministry of Trade and regional integration[8], the Government is subsidizing fuel prices by absorbing part of fuel price increase, to shield vulnerable people from the effects of the implementation of the liberalized exchange rate regime. The subsidy will be phased out over time, with quarterly fuel price revisions, and will be totally eliminated after one year. The government issued the first revision to the fuel price on October 8, 2024, since the start of the liberalization of exchange rate regime. The price of a liter of benzine in Addis Ababa was increased to 91.14 birr, from 82.60 birr, while diesel prices increased to 90.28 birr, from 83.74 birr. This new price revision increases the pump price of benzene by 10.3% and diesel by 7.8%. The rise in fuel prices, even if partially subsidized, constitute shocks on the economy, leading to cost-push inflation.

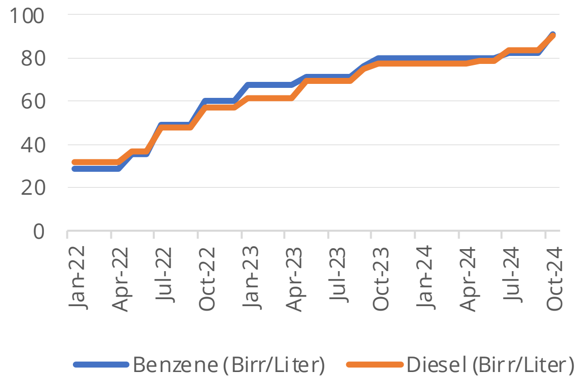

Figure 10: Fuel Pump price Trend, Addis Ababa

GRAIN PRICES

Maize and wheat prices stayed relatively steady in recent months, while horse beans, and vegetable oil prices have risen dramatically. Teff retail prices in September 2024 were 37% higher than September 2023 prices which were already high and September 2024 teff prices are 143% above the five-year average price for the month. The price of horsebeans is 61% higher than in September 2023, and 109% higher than the five-year average for the month (Figure 9). Month on month prices for various commodities have risen due to tightening seasonal supply.

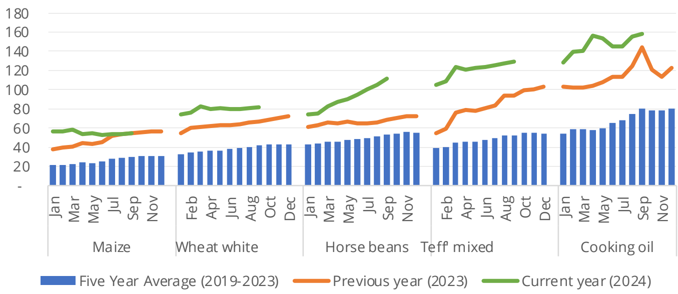

Figure 11: Key food items price trend

Terms of Trade (ToT):

The shoat-to-cereals Terms of Trade (ToT) in Somali region deteriorated between August and September. This is mostly due to an increase in cereal prices emanating from deteriorating Birr value in the parallel market where traders acquire foreign exchange to import staple food items. Shoat prices remained stable in the meantime

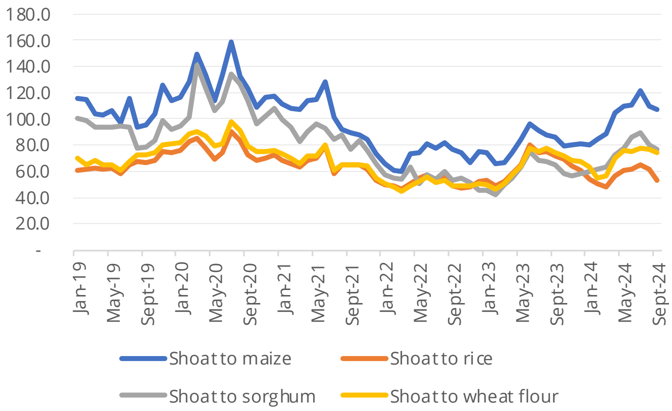

Figure 12: cereal to shoat terms of trade Somali region

2.4 CONFLICT

Armed Conflict Location Event Data (ACLED) shows that most of the conflict events in 2024 are concentrated in Amhara (1,126 events) followed by Oromia (673 events) as per data reported up to 11 October 2024. A five year (2019 – 2023) average data is generated to understand the conflict dynamics in the country by region which indicates that the highest percentage change is recorded in Amhara, Central Ethiopia and Oromia which shows an increase by 267, 91 and 65 percent from the five-year average respectively while there are the number of reported events declined in other regions.

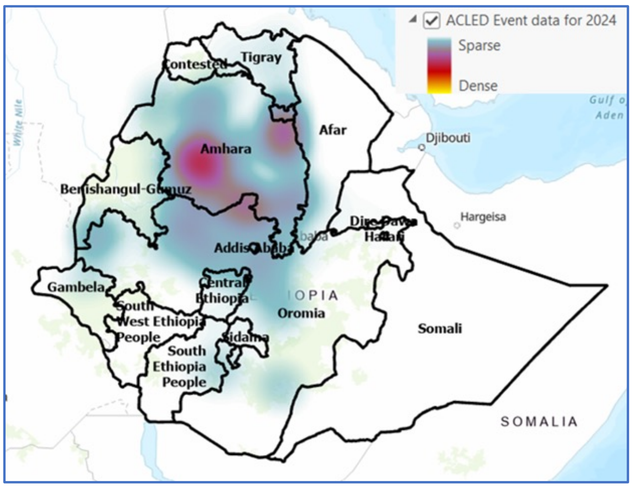

Figure 13: Heat map developed using ACLED Event data (2024)

[8]https://www.motri.gov.et/

REGION	2024 (# of Events)	Average # of Events in the last five years (2019 - 2023)	Difference	Percentage change
Addis Ababa	11	20	-9	-46%
Afar	10	55	-45	-82%
Amhara	1,126	307	819	267%
Benishangul/Gumuz	14	34	-20	-59%
Central Ethiopia	26	14	12	91%
Dire Dawa	1	7	-6	-86%
Gambella	22	22	0	-1%
Harari	2	3	-1	-38%
Oromia	673	408	265	65%
Sidama	4	8	-4	-52%
Somali	12	20	-8	-40%
South Ethiopia Region	29	25	4	15%
Southwest		5	-5	-100%
Tigray	99	221	-122	-55%

Table 1: Conflict Events summary by Region. Source: ACLED

As of May 2024, IOM IDP assessment report shows over 2.2 million Ethiopians are displaced as a result of conflict.[9] Conflict displaces people exposing them directly to loss of livelihood, protection concerns, and health hazards to mention some of the vulnerabilities. Due to lack of data it is hard to establish the extent of the impact of conflict on agricultural production, marketing and livelihood activities of non-displaced population. A Bellmon study[10] in August 2024 could only draw a limited conclusion for non-displaced population, crop production is indirectly affected by conflict when there is interruption in agricultural input supply and conflict was not cited as a major reason for deterioration in food security among focus group discussants for the Bellmon study.

[9]IOM, Ethiopia Displacement Tracking matrix Report 19, data covering November 2023-May 2024

[10]USAID Ethiopia Bellmon Study Post Meher Production and Market Assessment for Major food Crops in Ethiopia, August 2024

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