

MONTHLY SITUATION REPORT FOR ETHIOPIA - NOVEMBER 1996

Consolidated UN report prepared by the Information Section of the Emergencies Unit for Ethiopia from information and reports provided by specialised UN agencies, the Government and NGOs

HIGHLIGHTS

- Ethiopia is expecting a record *meher* harvest - over 20 percent increase in yield as compared with the previous year's harvest - reducing food aid requirements in 1997.
- Local purchases and export of surplus production in 1997 likely to be part of the main recommendations of the FAO/WFP joint assessment mission.
- Fertiliser sales reach 251,000 tons for the main 1996/97 cropping season, slightly disappointing and below expectations; pledges for 1997 amount to 270,000 tons.
- Relief and regular food aid distributions in Ethiopia expected to amount to some 242,000 tons by the end of 1996.
- Prospects for a good *meher* harvest have caused cereal prices to decline further.
- A joint UNHCR/ARRA/WFP mission has traveled to western Ethiopia to verify reports of a new influx of refugees from Sudan.

OVERVIEW

FAO/WFP Crop and food supply assessment mission

The joint FAO/WFP Crop and Food Supply Assessment Mission completed its work on 29 November. Preliminary findings of the mission indicate a record grain harvest for Ethiopia in the 1996/97 cropping seasons due to a combination of factors, including: favourable rainfall conditions throughout the cropping season, a moderate increase over the previous year in area planted, increased extension services and the good availability of farm inputs, such as improved variety seeds and fertiliser. This year's production of cereals and pulses is therefore likely to exceed the revised estimate for the 1995/96 production by 20 percent, meaning that Ethiopia will have a very comfortable surplus grain production (at least 400,000 tons) next year.

An excellent national harvest is expected to reduce food aid needs in 1997, by perhaps as much as 30 percent in comparison to 1996 relief requirements. The good harvest will also increase food availability in the market, facilitating inter-regional trade. Nonetheless, food aid will still be required for an estimated 2 million people representing the most food insecure population groups in the traditionally deficit areas of Tigray, North and South Welo zones and Wag Hamra (Amhara Region), as well as in the densely populated North Omo zone

(Southern Nations Nationalities Peoples Region). These areas, in spite of good national production, continue to have limited access to food.

According to WFP, a significant part of the 1997 relief requirements will be met from 1996 carry over stocks and carry over pledges. As Ethiopia will clearly not require food aid imports in the coming year, both FAO and WFP are likely to recommend the local procurement of all food aid requirements in the coming year drawing on the expected large domestic surplus. In light of the record harvest and limited capacity for domestic markets to absorb this surplus, the FAO/WFP mission have also indicated that concerted efforts may be required from the Government and donors to promote the export of grain, particularly maize, during 1997.

Good national availability and low cereal prices, although improving food security in the country, will not necessarily translate into long term sustainable food self sufficiency. The record grain harvest of the 1996/97 season is mostly attributable to abundant and well distributed rainfall (accounting for 50 percent of the production increase). The contribution of improved agricultural extension services and increased use of farm inputs remains relatively small, accounting for less than 20 percent of the total production increase. Subsequently, agricultural production in Ethiopia, particularly for the majority peasant farmer sector, remains dependent on low-technology rain-fed farming, which is susceptible to seasonal irregularities and harvest failures.

The final result of the joint FAO/WFP Crop and Food Supply Assessment Mission is expected to be released in mid-December, about the same time as the launch of the Government appeal scheduled for 16 December.

GENERAL DEVELOPMENTS

The Consultative Group meeting on Ethiopia will be convened in Addis Ababa 10-12 December. The meeting, to include high level delegations from donor governments and bilateral organisations, will be presented with the macro-economic, food security, education and health strategies and proposed programmes of the Government of Ethiopia for review and pledge consideration. The meeting is expected to culminate in the presentation of donor commitments to Ethiopia.¹

AGRICULTURE AND RELATED ISSUES

Meher harvest prospects

Surveys by the Commission for Disaster Prevention and Preparedness (CDPP), UN agencies and NGOs already indicate that the 1996 harvest results in most parts of the country will be substantially above the level reached in the previous year. However, parts of the traditionally vulnerable highlands in the north and north-east of Ethiopia have experienced protracted dry spells or excessive rainfall and still require close monitoring and assistance in the coming months in order to avoid a recurrence of severe food shortages and malnutrition. Although farmers have taken advantage of the dry spell in November and harvesting was ongoing in most grain producing regions, post-harvest losses remain an issue of concern and could still affect overall grain availability in the coming year.

¹ The general developments section of this report is more comprehensively covered in the "Horn of Africa - The Monthly Review" prepared by the UNDP-EUE. For more information please refer to the latest HoA Monthly Review, Vol. 1., No. 7, covering the period 1-31 November 1996.

In Eastern and Southern zones of Tigray and Wag Hamra zone (Amhara Region), where farmers are dependent on the *kiremt* rains for the main harvest, there have been reports of a poor season and lower harvest prospects in some highland weredas. Given the vulnerability of these areas, relief distributions may need to be increased as early as the beginning of 1997.

The *bega* season or second modal rains, which normally start in October and end in January in southern Ethiopia, initially recorded a positive start in early October. Since its beginning, however, there have been increasing reports of poor rains in the Borena zone (Oromiya Region) and the eastern parts of the Somali Region (Liben zone), where rains contribute greatly to water replenishment and pasture recovery. A joint mission of the DPPC, regional DPPB, CARE and UNDP-EUE to the area in mid-November found that both areas have been seriously affected by drought and an influx of pastoralists from neighbouring Kenya and Somalia earlier in the year. The DPPC is currently reviewing the relief needs in Borena at the request of the local authorities; however, the situation in the Somali Region has not yet been verified.

Fertiliser update

As at the end of November, fertiliser availability for the 1996 agricultural season amounted to over 410,000 tons (including 1996 procurement of 349,000 tons and 1995 carryover stocks of amounting to 61,000 tons). Fertiliser sales have so far reached a total of 251,261 tons, with the Oromiya Region recording the highest sales of 133,531 tons as compared with Amhara Region (62,466 tons), Tigray Region (6,903 tons), SNNPRS (39,780 tons), Somali Region (35 tons), Addis Ababa (1,046 tons), Benishangul (220 tons) and various areas (7,280 tons).²

Fertiliser sales in 1996 have been relatively disappointing and much lower than the anticipated distribution level of 392,000 tons. Some of the main factors contributing to the low performance in 1996 could be cited as: 1) the difficult pre-positioning and delivery of fertiliser stocks in mid-year due to the inaccessibility of roads and heavy rainfall; 2) the general lack of experience of newly established private fertiliser companies; and 3) the problems encountered by farmers in accessing credit. Problems in the fertiliser sector continue to hamper the intentions of the Government to establish a competitive marketing system concurrent with increasing peasant agricultural productivity and food security. While fertiliser subsidies are decreasing (with a plan to phase out by 1997), retail prices are increasing and excessive grain stocks in the regions may soon discourage farmers from using fertiliser on some crop varieties.

Pledges against the 1997 national requirement remain at: Government of Ethiopia 100,000 tons; Government of Germany 120,000 tons; International Development Agency 50,000 tons. Available pledges of 270,000 tons together with expected 1996 carry over of 140,000 bring fertiliser availability in 1997 to a total of 410,000 tons³. The German pledge allocated for use by AISCO (60,000 tons) has already been tendered. There have also been indications of pledges from the governments of Italy and the Netherlands. A total of 50,000 tons of the Government pledge arrived in November and the balance is expected by the end of January 1997. Of the tendered German pledge, a total of 30,000 is scheduled to arrive in the second week of December.

Pest infestations

Preliminary assessments indicate that infestations of quelea birds, which have been reported over the past few months, do not seem to have greatly affected crop prospects. However, control measures continue in areas of the Rift Valley (Zway), Gamo Gofa, Eastern Hararghe

² Source: FAO Addis Ababa, 30 November 1996.

³ The 1997 fertiliser consumption target has been established at 400,000 tons.

and North Shewa (Shewa Robit) where additional outbreaks have been reported. Operations are expected to be completed in December.

The desert locust situation in Ethiopia remains very calm. Reports of favourable conditions along the breeding sites of the Red Sea coast and the possibility of outbreaks in neighbouring countries do not pose a direct threat to Ethiopia. However, the winter/spring breeding areas of Eastern Hararghe (Region 4) and the Ethiopian Somali Region are currently being surveyed, in case conditions for desert locust breeding develop in the coming months.

FOOD AID AND LOGISTICS

Food aid status

Relief and regular food aid pledges amount to a comfortable 216,130 tons against a requirement of 152,386 tons, unchanged over the past two months. Of the pledges for relief and regular programmes, 92,005 tons (including combined imports and the local purchase of Euronaid) have so far been delivered. Pledges against the 100,000 tons cereal requirement for the Emergency Food Security Reserve remain at 95,750 tons.

Food aid distributions

Between January and August, the DPPC and NGOs distributed/prepositioned a total of 225,243 tons to the most food insecure population groups. With October and November, the first months of the main *meher* harvest in most grain producing areas of Ethiopia, food distributions normally decrease reflecting improved household food security at this time. Distributions in October were reduced to 8,468 tons, down from 14,623 tons in September and the higher figures of the preceding months early in the year. Distributions are likely to remain low until the end of the year, pending the requirements stipulated in the Government's 1997 appeal.

Total relief and regular food distributions in Ethiopia until the end of 1996 are expected to amount to some 242,000 tons compared with 292,000 tons in 1995.

EFSR storage capacity

The Emergency Food Security Reserve currently has stocks of about 193,342 tons in various warehouses with the following breakdown: Nazareth 29,037 tons; Shashemane 19,852 tons; Kombolcha 107,449 tons; Mekele 36,210 tons; and Dire Dawa 794 tons. In addition, the reserve has a total of 112,444 tons in outstanding loans from the DPPC, WFP, EGTE and NGOs.

The EFSR is negotiating with the Ethiopian Grain Trade Enterprise and the private sector to secure additional storage space for 1997. Discussions are also underway to determine three new locations for EFSR warehouses, tentatively assigned as Gonder (Amhara Region), Bedele (Oromiya Region) and North Omo (SNNPRS).

1996 local purchase programme

Out of the European Union purchase of 75,000 tons of grain for the EFSR, a total of 61,028 tons has so far been delivered. The European Union and Euronaid will shortly issue tenders for the purchase of 15,127 tons of grain to compensate 8,771 tons of cancelled EU contracts and for the purchase of 6,356 tons for NGOs by Euronaid.

WFP reports a total of 87,634 tons of grain in the pipeline for local purchases for various projects, out of which 72,364 tons are confirmed contributions. The bulk of the forthcoming WFP local purchases will be in repayment to the Food Security Reserve. The purchase of these commodities depends on the storage capacity of the EFSR as well as several other issues that will have to be jointly agreed upon, including repayment of loans and the commodity mix of EFSR. The Government has indicated a willingness to allocate additional funds to the Reserve for rent of storage space.

Market prices and trends

Prospects of a good *meher* harvest have caused cereal prices to decline further during October and early November. In Addis Ababa, as well as the other main marketing centres of the country, wholesale prices have been declining throughout the year for all cereal crops with the exception of white wheat, which has remained constant. According to the latest Grain Market Research Project's Market Information Bulletin, grains from the 1996/97 harvest have already started flowing into some of the larger markets, and given the expected large *meher* harvest, may depress prices even more over the next few months.

1996/97 production impact on markets

The high crop production in 1996/97 and subsequent surplus carried into 1997 will have several implications on the many aspects of production, marketing and, ultimately, food security in Ethiopia. First, the high levels of production will greatly exacerbate the decline in local grain prices; second, increase amounts in storage and deferred marketing may result in greater storage losses and reduced qualities when sold. In addition, in the short-term large discrepancies in prices can be expected to develop between surplus producing and deficit consuming areas as the marketing system is highly fragmented and domestic infrastructures do not allow quick response.

Export to adjacent countries is a possibility in some cases. Teff and sorghum are presently sold to Eritrea and the purchase of grain by food aid donors for use in Somalia, northern Kenya, Sudan and even for export to Uganda may be reviewed in the coming year.

Privatisation of NGO vehicles

Privatisation of the NGO fleet is progressing with the joint committee set up for this purpose planning the second phase of the programme. The first phase included the sale of trucks managed by the Norwegian Church Aid (NCA), Lutheran World Federation (LWF), Catholic Relief Development Agency (CRDA), and World Vision. The sale of NCA trucks has been completed, with some problems encountered in the processing of duty and customs payments. The forthcoming phase of privatisation will cover trucks operated by Redd Barna, CARE, Catholic Relief Services and Menschen Fur Menschen.

HEALTH AND NUTRITION

Epidemics

During the past month, outbreaks of malaria have continued to be reported from various parts of the country. According to WHO, however, these incidences do not indicate an epidemic but are part of a seasonal outbreak that normally occurs between the months of August and December. Furthermore, there have been no reports of meningo-coccal meningitis, usually prevalent during the last quarter of the year.

Nutritional status

A recent nutritional survey carried out by Save the Children Fund (UK) in East and West Hararghe zones of the Oromiya Region shows a satisfactory nutritional status and an overall improvement in nutritional status in all weredas, following an initial decline in some areas at the beginning of the year. Food aid consumption patterns are stable and likely to remain so, given the optimal main season production.

Another survey carried out by SCF in the Welayita area of North Omo zone (SNNPRS) has placed the nutritional status in both the eastern and western highlands at a satisfactory level, but showing a gradual decline in the past few months. SCF have recommended close monitoring of the situation in these areas in the coming months. In contrast the nutritional level in the lowlands has remained stable since early 1996. In Wag Hamra and North Welo zones (Amhara Region) where this year's main production has been similar to that of 1995, contrary to the positive trend in most other parts of the country, the nutritional status remains mixed, and the SCF nutritional surveillance programme has registered medium to poor levels in several weredas.

REFUGEES IN ETHIOPIA

Refugee/returnee statistics⁴

Sudanese refugees:

The number of assisted Sudanese refugees in three settlement sites in western Ethiopia reached 72,804 with the following breakdown: Bonga 17,110; Dimma 12,367; and Fugnido 43,327.

Somali refugees:

The total assisted Somalis in the eight camps remains at 287,488 with the following breakdown: Hartisheik 58,708 ; Kebribeyah 10,305; Darwanaji 43,006; Teferiber 46,379; Camaboker 31,932; Daror 45,011; Rabasso 24,865; Aisha 15,282; and an additional 12,000 (unregistered and unassisted).

Other refugees:

A total of 15,000 Somali refugees are currently unassisted in Dollo; 8,671 Kenyan refugees are assisted Moyale and Dokisso areas; 18,000 Djiboutian refugees receive assistance in the Afar Region.

General refugee issues

Following reports of an influx of over 3,000 refugees from Sudan to the Asosa area, a joint WFP/ARRA/UNHCR mission is visiting the area to review and verify the situation. Unofficial reports have indicated that the situation of the newly arrived is extremely serious, with many children under five registering varying levels of malnutrition.

There have also been reports of a spontaneous influx of several hundred refugees in the Moyale area in southern Ethiopia as a result of ethnic conflict in northern Kenya.

⁴ Source: UNHCR refugee statistics and registration by site as of 30 November 1996.

Construction of earth dams in the Hartisheik refugee camps is nearing completion. Possible water shortages in these camps has resulted in the need for immediate water purchases, slightly earlier in the season than anticipated..

A household food survey is currently underway in the refugee camps of eastern Ethiopia by Save the Children Fund (UK) as a follow-up measure to the recommendations of the joint WFP/ARRA/UNHCR mission earlier this year.

Refugee pipeline

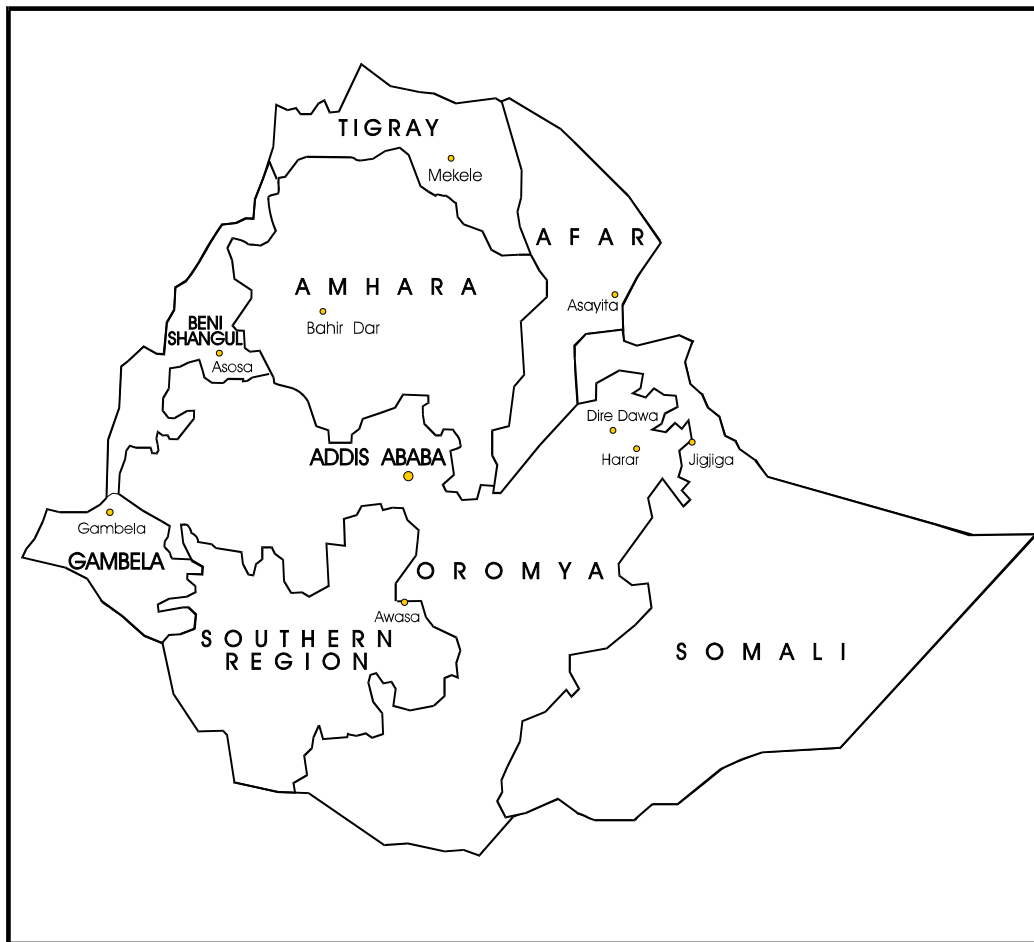
WFP has indicated that resources of grain and oil for the refugee programme are sufficient to cover the December 1996 distribution. A new phase of the refugee food assistance programme is scheduled to commence on 1 January 1997, for which pledges are urgently required from the donors in order to avoid disruptions in food distributions early next year.

REPATRIATION

Preparatory work for the verification of the caseload of Somali refugees who have indicated an interest in repatriating to North-west Somalia has not yet been completed. Discussions are underway to expedite the process and given an agreement is reached by the Administration for Refugee and Returnee Affairs (ARRA) and UNHCR regarding the general modalities for repatriation, movement can be expected as early as December 1996. There is, however, still some uncertainty over the effect of the national congress in North-west Somalia and the implications it may have on this phase of repatriation.

Planning continues to recommence the repatriation of Ethiopian refugees from Sudan. Preparations are also underway to complete the mass repatriation of Ethiopians from Kenya by the end of 1996. So far, some 2,500 Ethiopians have returned to Gode, Jigjiga, Moyale (Somali Region) and Addis Ababa (region 14) and over 3,200 have registered to return to Gode and Addis Ababa.

ADMINISTRATIVE MAP OF ETHIOPIA



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SOURCES:

UNDP/EUE field reports; Administration for Refugee and Returnee Affairs; CARE; CRDA; Disaster Prevention and Preparedness Commission (DPPC); European Union; FAO; FEWS; National Meteorological Services Agency (NMSA); Ministry of Agriculture; SCF (UK); UNICEF; UNHCR; WFP; WFP Food Aid Information Unit; WHO.

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