Aligning Efforts to Foster Food Systems Transformation
Ethiopian Food Systems Roadmap

Concept Note – version 4
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1. Background

Ethiopia has experienced substantial agricultural growth since 2000 due to a doubling in the use of modern inputs, significant land expansion, increased labor use, and a more than two percent per year growth in total factor productivity[1]. At the same time, the economy and the demography of the country, in the past two decades, went through a radical transformative process, with the urban population doubling, and the GDP contribution of non-agricultural output rising from less than half, in 2000, to about two-thirds, today. Moreover, household welfare indicators have drastically improved as rural poverty fell from 45 percent, in 1999–2000, to less than 23 percent, in 2015–2016. Child malnutrition improved significantly, with child stunting prevalence falling from 58 percent to 37 percent, from 2000 to 2019. Wasting declined by two percent only[2] in the same period. While almost all households can today afford diets that meet their energy needs, but the cost of a nutritious diet is unaffordable for most households[3]. The Ethiopian regional diets, both current ones, and the ones optimized by (cheapest) cost and nutrition content, produce gas emissions which are low, when compared with the EAT Lancet recommendations for planetary sustainability[3,4]. This provides potential opportunities for positive food system transformation.

2. Challenges in food and nutrition security

Malnutrition remains a serious public health concern. In 2009, the Cost of Hunger Study estimated 16.5 percent of the GDP was lost annually because of stunting[3]; wasting is unacceptably high, and the cost of a nutritious diet remains unaffordable for at least three out of four Ethiopian households[3].

This is so, because the existing Ethiopian food system faces several important challenges. In Ethiopia, the cost of a diet meeting the nutrition requirements cost at least four times more than a diet that meets only energy needs[3]. Ethiopian households focus their agricultural production on grain staples and tend to depend on markets for access to fresh, nutritious foods, such as vegetables, fruits and meat[3]. Prices of these same nutritious foods have increased in recent years, whilst grain, sugar and oil prices have decreased, meaning that access for household consumption is more difficult than ever[3]. As a consequence, the supply and availability of fresh, nutritious foods, such as fruit and vegetables and animal based foods are insufficient, and current levels of domestic production are not able to adequately meet the nutrient requirements of a growing population[3]. Moreover, fruits and vegetables face significant post-harvest losses of not less than 30 % contributing to challenges in related market value chains. The food safety issue also remains a great concern for health. Contamination with aflatoxin, pesticides and heavy metals have been identified as challenges. Limited awareness at Ethiopian community level specifically of the rural poor on causes and effects of malnutrition is one of the factors that aggravates the problem of food and nutrition insecurity. This is

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compounded by entrenched traditional and religious practices that limit consistent access to nutritious foods. This call for sustainable nutrition education using a multiple of channels.

The agriculture sector is critical to livelihood and economic development. Many of the rural population depend on agriculture for their livelihoods. Although there have been significant improvements in food and nutrition security, in the last three decades, most of the progress has been with respect to staple foods, and diversification of agriculture has been limited. As a result diet diversity has persistently remained low. Although productivity of both staple and nutrient-dense foods need to improve, their cost and non-affordability to the majority represent an access-barrier for most households in both urban and rural settings. But the agriculture sector continues to play a key role as a source of foreign exchange and therefore contributes a significant proportion of national GDP. Within this context frequent climate shocks call for efforts to improve resilience. The recent locust infestations in some settings and the global COVID-19 pandemic dramatically disrupted the national food systems, exacerbating the divide between the cost and the non-affordability of a nutritious diet for the most vulnerable segments of the population[6,7].

The 2030 Agenda for Sustainable Development is a global roadmap to achieve a better future for all. However, five years after the world committed to end hunger, food insecurity and all forms of malnutrition (SDG2) and climate mitigation and adaptation (SDG13), most countries are still off-track to achieve the same objective on time. Ethiopia is no exception despite all the progress achieved. This calls for efforts to accelerate progress.

3. Way forward to improve food and nutrition security through food systems transformation

A food system transformative process is urgently needed to achieve the SDG 2 and 13. Because the agriculture sector accounts for more than one third of the GDP while three out of four Ethiopians are engaged in the agriculture sector, the sector offers an opportunity to foster positive transformation. Almost all the cultivated land is occupied by small-holder famers (1 in 5 is a woman), owning less than one hectare of farm size. The prevailing situation in terms of land, water and labor is the context within which the agriculture sector must improve the food security and nutrition status of the country. It will require innovative thinking given the limited land available per farming household and other challenges faced.

The food system of Ethiopia can be transformed, leveraging the thriving national policy environment. This policy environment includes the, Growth and Transformation Plan, Agricultural Transformation Program, Agricultural Growth Program, Nutrition Sensitive Agriculture Strategy, Small-Scale Horticulture Development and Marketing Strategy, Food and Nutrition Strategy, Productive Safety Net Program, and School Feeding Program, among others. Within this existing policy framework, the Government of Ethiopia, through the Seqota Declaration, committed to end hunger and malnutrition, using innovative approaches that accelerate progress on economic development, food security, nutrition and health. Development partners aim to align their efforts to the government goals, mirrored in these policy instruments, and contribute for the achievement of progress.

The Food Systems Summit, organized by the UN, to take place in September 2021, is part of the Decade of Action to accelerate our collective efforts to achieve the 17 SDG Agenda. The UN Secretary-General is calling on world leaders to take part in the Food Systems Summit that will help to establish the future direction for food systems and accelerate collective action. This reflects the increasing recognition of food systems as central to achieving the 17 SDGs by 2030, as per the FAO quotation below.

> '*So why "food systems?" Food systems encompass the entire range of actors and their interlinked value-adding activities involved in the production, aggregation, processing, distribution, consumption, and disposal of food products that originate from agriculture, forestry or fisheries, and parts of the broader economic, societal and natural environments in which they are embedded' (FAO, 2018).*

The Summit will focus on five Action Tracks that will engage stakeholders from a wide range of backgrounds to foster new actions and partnerships and amplify existing initiatives. The Action Tracks are listed below:

1. Ensure access to safe and nutritious food for all
2. Shift to sustainable consumption patterns
3. Boost nature-positive production (Climate-smart)
4. Advance equitable livelihoods
5. Build resilience to vulnerabilities, shocks and stress

These action tracks are very relevant to the challenges Ethiopia faces that have been described above but the context must be considered to inform actions.

Ethiopia must define its own food system. Leading to the Food System Summit, Ethiopia is developing a **food system roadmap** leveraging the large body of evidence generated so far in the country and linking this to global evidence. The Roadmap will leverage existing evidence to inform implementation of existing policies and programs, supported by government sectors, development partners, and other stakeholders active in the country.

This concept note describes the objectives and the process of developing the Ethiopian Food System Roadmap by leveraging available evidence to inform Government Sectors and Partners, at federal, regional and local levels, aiming to accelerate achieving sustainable healthy diets for all.

4. Ethiopia food system position paper, vision and roadmap

Ethiopia plans to develop a GoE Food System Position Paper and Roadmap. The position paper will describe the needed food system transformation and related vision and the roadmap will inform the actions needed. The position paper will elaborate an Ethiopian vision for the needed food system transformation, evidence-based recommendations tailored for the Ethiopian context, and a call for action on urgently needed actions to accelerate progress on achievement of the SDGs. The roadmap will outline and describe prioritized interventions to inform implementation pathways towards the desired outcomes.

The following process and timeline is proposed:

Food Systems Position Paper

The position paper will be developed through the following process,

1. A draft will be developed considering available evidence nationally and globally
   The draft will inform a Food Systems Dialogue of the Government of Ethiopia and the Global Panel on Agriculture and Food System for Nutrition. The outcome of the dialogue will in turn inform refinement of the position paper.
2. Outcomes of the national and global food systems dialogues will be considered[1];
3. The position paper will be finalized by the second quarter of 2021;
4. The position paper and roadmap (developed in parallel but linked process) will be presented for endorsement by the Government Sector Ministers at the end of the second quarter of 2021;
5. The endorsed position paper will be finalized to be presented to the participants of the UN Food System Summit (20th September 2021), and of the Nutrition-for-Growth Event (if confirmed, expected before end of 2021) and used to advocate for global support.

Food Systems Roadmap; The Roadmap will be developed in a parallel but linked process to the position paper as follows,

a. **Developing a food systems framework for Ethiopia.** Informed by the evidence and vision provided in the food system position paper, existing food systems frameworks described by the Global Panel Foresight Report (number 1.0 & 2.0)[8], the HLPE framework[9], and evidence from the Fill the Nutrient Gap Analysis for Ethiopia[10] an adapted food systems framework will be drafted.
b. **UN Food System Summit Action tracks adapted to Ethiopia.** The food systems position paper and the draft food system framework will be used to inform adaptation of the UN Food Systems Tracks 1-5 to the Ethiopian context and *define* a Transformative Ethiopian Food System roadmap - unpacked by Action Track.
c. **Describe impact pathways for food systems transformation towards 2030.** Based on available evidence and the roadmap in item a), describe impact pathways for food system transformation and describe innovative interventions and related recommendations towards reducing the cost and non-affordability of nutritious diets. Accordingly, develop theories of changes for adoption within current national programs (PSNP, Seqota Declaration, Nutrition Sensitive Agriculture Strategy, Food and Nutrition Policy, etc.).

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[1] For more information on the Global Food System Dialogue approach see this link.

Expected roadmap Outcomes

The following outcomes are envisaged on the Roadmap towards the UN Food System Summit (by 20th September 2021):

- **A roadmap** developed to be taken forward to the UN Food System Summit in September 2021 and that government and other stakeholders can use to inform actions to promote positive food system transformation in Ethiopia, aiming at reducing the cost / non-affordability of nutritious diets for the most vulnerable segments of the Ethiopian population.
- **An enhanced understanding** of what food system transformation entails, by key stakeholders, and what is needed to mainstream the reduction of the cost / non-affordability of nutritious diets.

- **Inform the Seqota Declaration phase 2** (**expansion**) **and phase 3** (**scale up at national level**), **implementation** aiming at improving diet quality by making nutritious foods more accessible and affordable to contribute towards stunting reduction within sustainable and nutritious food systems.

- **Inform a mechanism to monitor, evaluate and draw lessons** on the food system transformation to inform and direct progress.

5. Partnerships and SDG17

As per the Sustainable Development Goal number 17 (SDG17), partnerships are critical. The position paper, mentioned above in this document, will be developed participatively and offer the opportunity for stakeholders, namely government Sectors and their partners, to firm up their intentions to work together in support of the agreed pathway on food system transformation for Ethiopia. The National Information Platform for Nutrition and the Nutrition Development Partners Forum will organize regular seminars to contribute to stakeholder consultations along the Roadmap development process and subsequent implementation of related actions in an integrated manner. Table 1, below describes the work-streams informing the position paper content, which will inform the Roadmap while Figure 1 reflects the envisaged flow of information from the consultations, stakeholder inputs and different deliverables of the roadmap development process.

Table 1. Planned activities of the Food Systems Roadmap development process and stakeholder involvement.

Phase:	1. Preparation of the Concept Note	2. Technical inputs support and Consultations/ Dialogues	3. Endorsement and Commitment	4. Final Outputs
Timeline:	December 2020	February 2021	From May to June 2021	August September 2021
Activity:	Concept note for the development of the Ethiopian Food Systems Position Paper and Roadmap drafted, revised and agreed	Roundtables discussions and workshops aligned with the Food Systems Summit Dialogue process	High level meetings with GoE Representatives Followed by Partners Consultation including private sectors and CSO	Final Position paper and Roadmap presented at the Ethiopian Food System Summit
Convener:	GoE: MOH and MOA	NIPN and NDPF	GoE: MOA/; MOH; MOFEC	GoE: MOA/; MOH; MOFEC
Participants in the process:	Core technical team: NDPF, NIPN, USAID, WFP, GIZ, FMoH/SD-PDU, FMoA/FNCO/ EIAR FAO, A4NH/ IFPRI/, A4NH/Biodiversity-CIAT	Key Stakeholders: GoE reps; D Partners; Private sector; CSO; Farmer associations; Youth groups	Key Stakeholders: GoE reps; D Partners; Private sector; CSO; Farmer associations; Youth groups	Key Stakeholders: GoE reps; D Partners; Private sector; CSO; Farmer associations; Youth groups

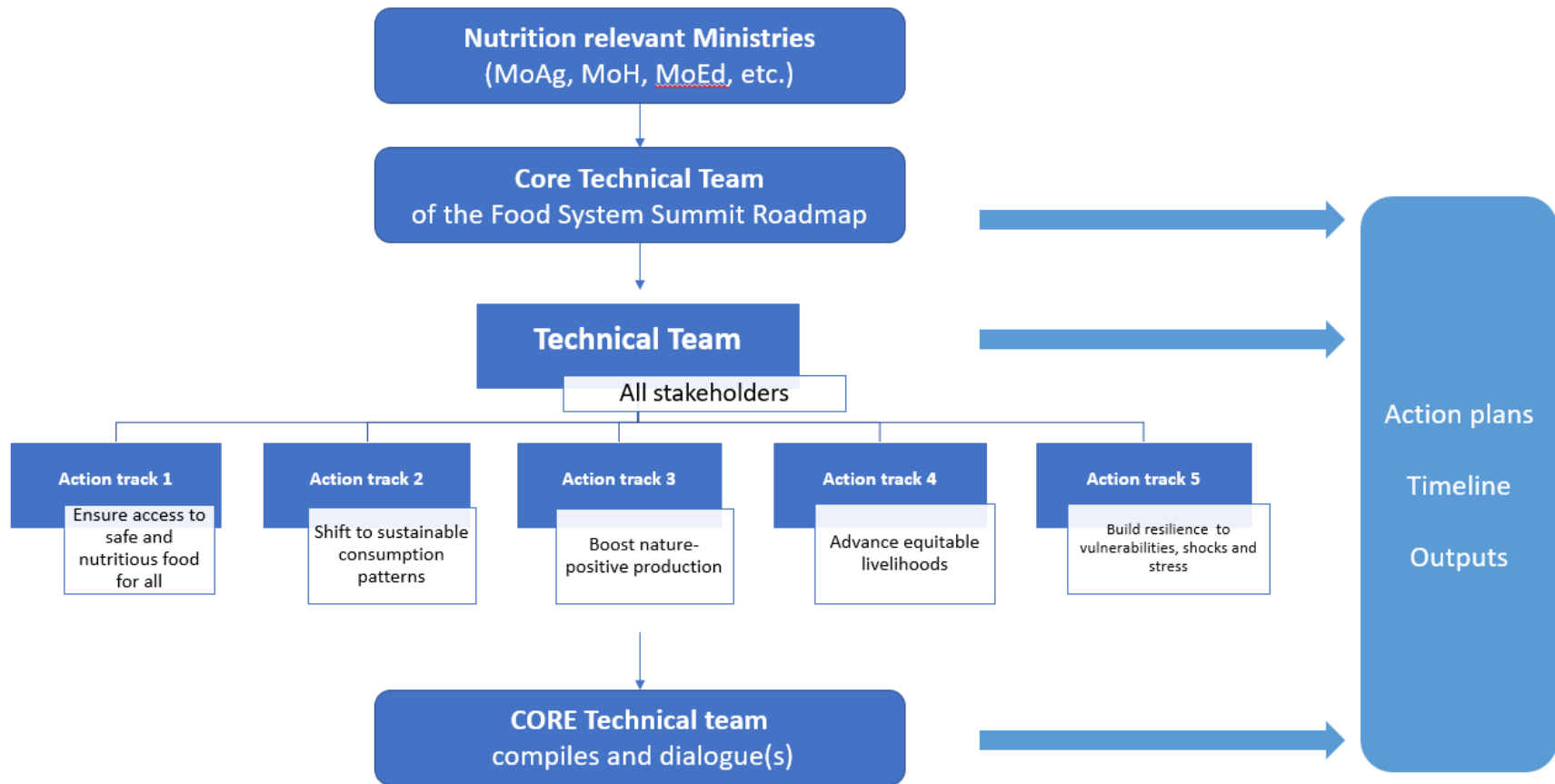**Figure1.** Flow of information on the Roadmap development process.

Figure 1: Ethiopia's Plan towards Food System Summit

One key task is to surface systemic solutions, commitments, and mechanisms to ensure commitments are followed by **action**

Identify **game-changing solutions** it can operationalize, champion, and obtain stakeholder commitments (e.g. complementary commitments from Government, private sector, civil society, UN partners, etc.).

October 2020	November 2020	December 2020	January 2021	February 2021	March 2021	April 2021	May 2021	June-Sept 2021	Summit N4G
Phase 1 Crowding in stakeholders; taking stock	**Phase 2** Generating ideas Concept Note **Engage Leaders**		**Phase 3** Identifying key areas – Ethiopian food system paper **Roundtable- Feb 9**		**Phase 4** **Ethiopian dialogues** on operationalizing Game-changing solutions		**Phase 5** **Ethiopian Food System Summit** **Global Food System Summit** **Translating commitment into action** **Nutrition for Growth Summit**		

Action track 1 – 5 dialogues feed into the Ethiopian food system position paper/ roadmap

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