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Report Highlights:

Post forecasts Ethiopia's wheat production in MY 2026/27 at 7.0 million metric tons (MT), up eight percent from MY 2025/26 on expanded irrigation, broader adoption of improved seed, and continued development of cluster farming and mechanization. Commercial wheat imports are forecast at 1.4 million MT as tight domestic supplies and steady demand continue to drive imports by private traders.

Executive Summary

Ethiopia's wheat production continues to increase, supported by expanded irrigation, wider adoption of improved seed, sustained investments in commercial cluster farming and mechanization, and strong government backing. Despite this progress, local wheat supplies remain tight. As a result, millers have increasingly turned to commercial wheat imports from the Black Sea market, which are often favored for their competitive prices. Corn production is projected to expand, driven by yield increases, the easing of export restrictions, and greater access to regional markets under the African Continental Free Trade Area (AfCFTA) framework. Similarly, sorghum production is expected to improve with the implementation of the National Sorghum Development Flagship Program. Barley, particularly malt barley, is also set to rise as both multinational and local brewers and malt factories increase investments, strengthening value-added processing. At the same time, weather related shocks, supply chain disruptions affecting access to inputs and markets, and rising input costs such as fertilizer and fuel continue to limit overall production growth.

Under Ethiopia's broader macroeconomic reforms and trade liberalization programs, government policies including the relaxation of export restrictions on staple grains, formalization of cross-border trade and the launch of trade under AfCFTA are expected to encourage larger-scale commercial production, particularly corn and stimulate corn exports to regional markets. Additionally, the Government of Ethiopia's (GOE) plan to establish national grain reserve stocks, along with related food security initiatives is likely to strengthen market integration and create more stable demand for domestic output, positively influencing grain production growth in the years ahead.

However, these policy efforts are unfolding in a challenging market environment. Domestic grain prices remain consistently higher than international levels, reflecting high production costs, supply chain inefficiencies, informal trade, and currency depreciation. Rising fuel and input costs, combined with intermittent security challenges in key grain production regions, have further increased transportation and operational costs, pushing up local prices and limiting access to inputs and markets.

Humanitarian pressures also remain significant. Ongoing conflict and weather-related shocks, including recurrent drought, flooding, and erratic rainfall, continue to disrupt livelihoods and reduce localized grain output. Millions of internally displaced people and other vulnerable groups depend on food assistance as production shortfalls persist in affected areas.

Overview

Ethiopia's grain production in MY 2026/27 is projected to increase, with gains in wheat, corn, and barley, moderate growth in sorghum, and a decline in millet. The positive gains are supported by expansions in improved seed use and irrigation despite structural and weather-related constraints. Wheat production is forecast at 7.0 million MT, up eight percent on expanded cluster farming and irrigation, while corn is expected to reach 10.5 million MT, 2.9 percent higher on wider hybrid seed adoption. Sorghum production is estimated at 4.1 million MT, up five percent under generally favorable weather, and barley at 2.5 million MT, rising four percent on firm demand for food and malting varieties. In contrast, millet output is projected to fall 15.6 percent to 950,000 MT due to reduced area. Higher input costs and currency depreciation continue to push domestic grain prices upward.

Table 1: Estimated Harvested Area, Production, and Yield: Major Grain Crops in Ethiopia

Crop	2024/2025			2025/2026			2026/2027		
	Area	Production	Yield	Area	Production	Yield	Area	Production	Yield
Wheat	1,910	6,200	3.25	1,950	6,500	3.33	2,050	7,000	3.41
Corn	2,550	10,200	4.00	2,550	10,200	4.00	2,600	10,500	4.04
Sorghum	1,650	4,100	2.48	1,600	3,900	2.44	1,650	4,100	2.48
Barley	960	2,300	2.40	970	2,400	2.47	990	2,500	2.53
Millet	455	1,125	2.47	445	1,125	2.47	400	950	2.38

Source: Post estimate (Area harvested in '000 HA, production in '000 MT, and yield in MT/HA)

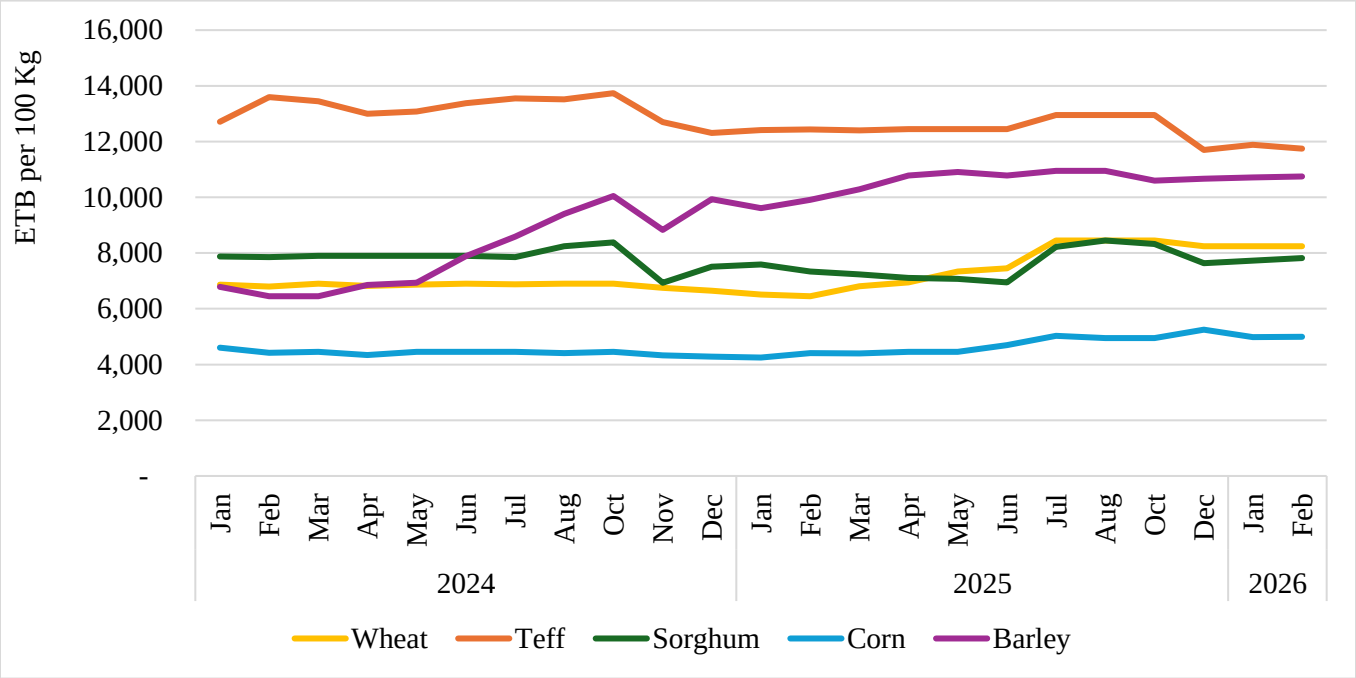
Ethiopia's 2025/26 *meher* cropping season (June to September) was generally favorable, with rainfall amounts reported as normal to above normal in many production areas. Despite this overall positive performance, the season was marked by a delayed onset of rains and localized crop damage linked to extreme weather events, including droughts, flooding, and hailstorms. These factors disrupted planting and crop development in several zones.

In the northern and central highlands, particularly in Tigray and Amhara, the late and uneven start of the *kiremt* rains from June to September delayed planting operations and consequently shifted harvest periods by up to a month. In Tigray, early season moisture stress led some farmers to replant short cycle crops such as teff and pulses. Hailstorms reportedly damaged more than 10,000 hectares of cropland, while reduced rainfall in mid-September slowed crop maturation. In Oromia, rainfall deficits in East and West Hararghe zones contributed to notable production losses. At the same time, heavy rainfall in parts of the South Ethiopia caused localized flooding, further affecting crop performance.

No major pest or disease outbreaks were reported at the national level, and overall production impacts were largely weather driven. However, localized shortfalls are expected to persist in areas affected by extreme weather events including Eastern Oromia (East Hararghe and West Hararghe), Southeast Tigray, and North Wollo Zone in Amhara regions. Early forecasts indicate that the March to May 2026

rains are likely to be near to above average across much of the country, especially in western and central regions.

Figure 1: Monthly Average Retail Price of Grain Crops in Ethiopia (2024-2026)



Source: National Market Information System (NMIS)

Note: Adama city is used as the reference market for grain prices in this report given its proximity to Addis Ababa and its significance as a major regional grain trading hub.

Between February 2025 and February 2026, Ethiopia's domestic grain market experienced noticeable price changes influenced mainly by seasonal harvest cycles and the weakening of the local currency. Teff remained the most expensive staple, although its price declined by about five percent, dropping from ETB 12,438 to ETB 11,750 per 100 kilograms (kg) during this period. In contrast, wheat prices recorded the sharpest increase, climbing by 28 percent from ETB 6,450 to ETB 8,250 per 100 kgs. Corn prices rose by 13 percent from ETB 4,413 to ETB 5,000 per 100 kgs. Sorghum and barley also recorded increases of around seven percent and eight percent, respectively, over the same period. Except for wheat, other grains showed slight price declines during the main harvest period from October to December, followed by gradual increases during the lean season from July to September. The depreciation of the local currency, along with higher costs for fertilizer, fuel, and other agricultural inputs, also placed additional pressure on market prices.

Among consumers, especially in urban areas, high teff prices (which are more than double the price of corn) have driven shifts toward more affordable grains such as corn and sorghum. As teff prices rise, urban households often mix teff flour with cheaper grains such as sorghum, maize, or rice. Wheat-based products like bread and pasta are increasingly preferred for convenience, and blending corn, rice, and sorghum into traditional recipes such as preparing injera has become a common approach to manage rising food costs.

WHEAT

Production

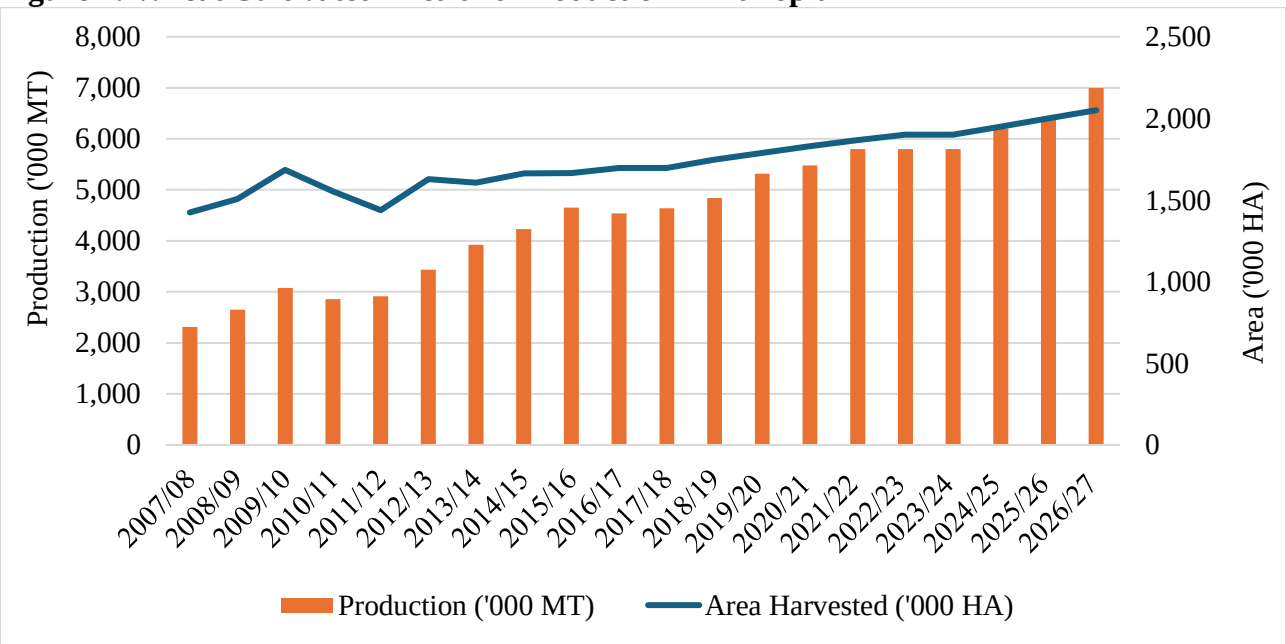
Post forecasts Ethiopia's wheat production in MY 2026/27 at 7.0 million MT, eight percent higher than the MY 2025/26 estimate, supported by continued expansion of irrigated area, broader adoption of improved seed varieties, strengthened extension services, and improved crop management under commercial cluster farming systems with increased mechanization.

Ethiopia launched its National Wheat Flagship Program in 2019, which aims to expand irrigated wheat cultivation in lowland areas and enhance productivity through improved seed varieties, fertilizer use, mechanization, and strengthened extension services. It also emphasizes value chain development by linking smallholder and commercial producers to domestic millers and agro-processors. Through these interventions, the program aims to conserve foreign exchange, stabilize domestic wheat supply, and position Ethiopia to generate exportable surpluses over the medium term.

The expansion of irrigated wheat production in lowland areas, along with improved commercial cluster farming and mechanization, is expected to enhance production, particularly if investments in irrigation continue and rainfall remains favorable in the main highland rain-fed areas in key producing regions including Oromia and Amhara.

During the MY 2025/26 *meher* season, wheat production in Ethiopia progressed steadily. Farmers and traders report that grain quality for this harvest season has been good, with no major pest or disease outbreaks affecting wheat productivity. However, rising input costs including seed, fertilizer, fuel, pesticides and herbicides continue to pose challenges. Looking ahead, sustained policy support and expanded irrigation infrastructure are expected to reinforce the steady production growth.

Figure 2: Wheat Cultivated Area and Production in Ethiopia



Source: USDA and Post Estimates

Consumption

Post forecasts MY 2026/27 wheat consumption at 8.2 million MT, a 3.8 percent increase over post's MY 2025/26 estimate. The continued expansion in total domestic consumption reflects Ethiopia's rising demand for wheat as a staple food. Growth is primarily driven by rapid population increase and accelerating urbanization, alongside evolving dietary preferences that increasingly favor processed wheat-based products such as bread and pasta. Ongoing rural-to-urban migration is a key structural driver of this trend. As millions relocate to cities where traditional staples such as corn and sorghum are less dominant, wheat has become the preferred staple due to its accessibility and convenience. The expanding urban food service sector and rising demand for commercially processed wheat products continue to reinforce wheat's role in the urban diet, supporting steady growth in domestic consumption.

Per capita wheat consumption in Ethiopia stands at approximately 54 kilograms per year, with an annual average growth rate of 1.0 percent over the past three years. Per capita wheat consumption is expected to steadily increase as Ethiopia's strong population growth and ongoing urbanization continue to shape food demand and support higher wheat consumption per individual. The gradual shift of the population from rural to urban areas, along with changing food preferences and improved availability of processed wheat products such as bread and pasta, will continue to support rising per capita consumption patterns over time.

Milling

Ethiopia's wheat milling industry remains a central driver of domestic wheat demand, linking local production and imports to a rapidly expanding urban food market. Around 500 flour mills operate nationwide, heavily concentrated in Addis Ababa and nearby areas, as well as in key regional cities including Adama, Hawassa, Bahir Dar, Mekelle, and Debre Markos. Total installed capacity is estimated at around 10 million MT annually, yet most mills are operating well below capacity with an average capacity utilization ranging between 45 and 50 percent. High input costs, inconsistent wheat supply, foreign exchange shortages, rising taxes and operational costs, and limited access to working capital amid currency depreciation have constrained operations, periodically dampening effective grain demand and forcing some millers to scale back or suspend production.

In August 2024, Ethiopia implemented a mandatory wheat flour fortification policy under its National Food Fortification Program, requiring all wheat flour, whether locally milled or imported, to be enriched with essential vitamins and minerals. The mandated micronutrients include B-complex vitamins (Thiamine/B1, Riboflavin/B2, Niacin/B3, B6, B12), folic acid (B9), zinc and iron. The initiative aims to address widespread micronutrient deficiencies and improve overall public health. According to the Ethiopian Millers Association, 130 millers have so far been certified as compliant with the fortification standards. These millers have also been granted duty-free access to import the necessary premixes for fortification.

Millers report that wheat harvests for MY 2025/26 appear promising, with good production observed in several growing areas. Despite this positive outlook, they note that the supply of locally produced wheat still falls short of meeting the needs of flour mills. Many millers also pointed to price increases in the domestic market. Several indicated that wheat prices have risen considerably compared to last year. For example, a miller operating in Adama town reported that his factory purchased local wheat at prices roughly 30 to 35 percent higher than the previous year, reflecting continued price escalation in the domestic market.

In terms of quality, millers acknowledge that domestic wheat has improved gradually over time. However, concerns remain about consistency and key processing characteristics. According to millers, imported wheat still tends to offer better quality, particularly in terms of gluten content, which makes it more suitable for flour production. The millers noted that they rely on a combination of domestic wheat and imported grain to meet quality and volume requirements. Hard and durum wheat varieties are preferred because of their higher protein content, which improves flour strength and baking performance. Blending practices are common among millers to maintain consistent product quality.

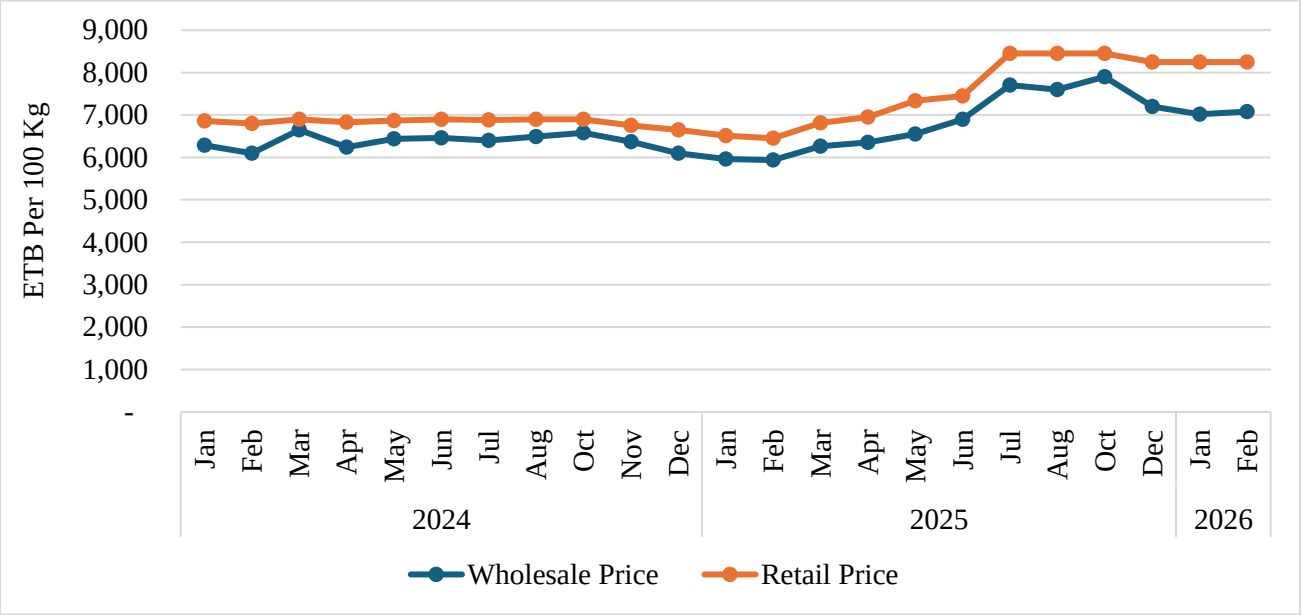
Prices

The Ethiopian Trading Businesses Corporation (ETBC) is mandated to stabilize domestic markets for key staple grains including teff, wheat, and corn and other consumer goods. ETBC sources these commodities from local markets to respond to supply shortfalls and mitigate price volatility. Through its market interventions including buying from cooperative unions and traders when supplies are abundant and releasing stocks when needed, ETBC maintains steadier availability and pricing while supporting farmers and consumers. ETBC also procures staple grains, including wheat and corn from the domestic market and supplies them to international humanitarian agencies and other development partners for distribution to food assistance programs. As part of market stabilization efforts, ETBC plans to purchase locally and sell 46,000 MT of wheat, 47,000 MT of corn, and 17,800 MT of teff to the domestic market in the 2025/26 Ethiopian fiscal year (July to June).

Domestic wheat prices continue to follow a seasonal pattern shaped by harvest cycles and tighter supplies during the end of the marketing year. Between February 2025 and February 2026, domestic wheat retail prices increased by 28 percent, rising from ETB 6,450 to ETB 8,250 per 100 kgs. Wholesale prices rose by 19 percent over the same period. Domestic wheat prices have been pushed higher by a combination of increased demand and currency depreciation, which raised costs for key agricultural inputs such as fertilizers, improved seeds, and crop protection products.

Compared with July 2025, both retail and wholesale prices in February 2026 declined by two percent and eight percent, respectively. The lower prices reflect improved market availability following the arrival of the new harvest between December and February.

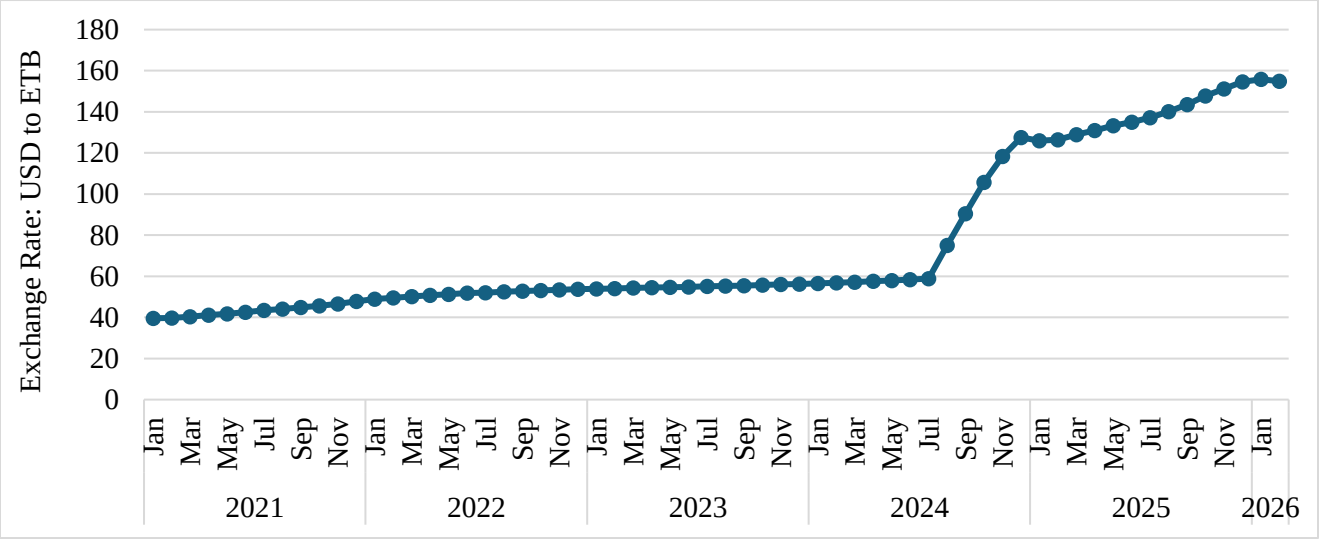
Figure 3: Monthly Average Retail and Wholesale Wheat Grain Prices (2024-2026)



Source: National Market Information System (NMIS)

The local currency, the Ethiopian Birr (ETB), sharply depreciated after July 2024 following Ethiopia's shift from a fixed exchange rate to a market-based system. By February 2026, one U.S. dollar (USD) was equivalent to about 155 ETB.

Figure 4: Monthly Average Exchange Rate: USD to ETB

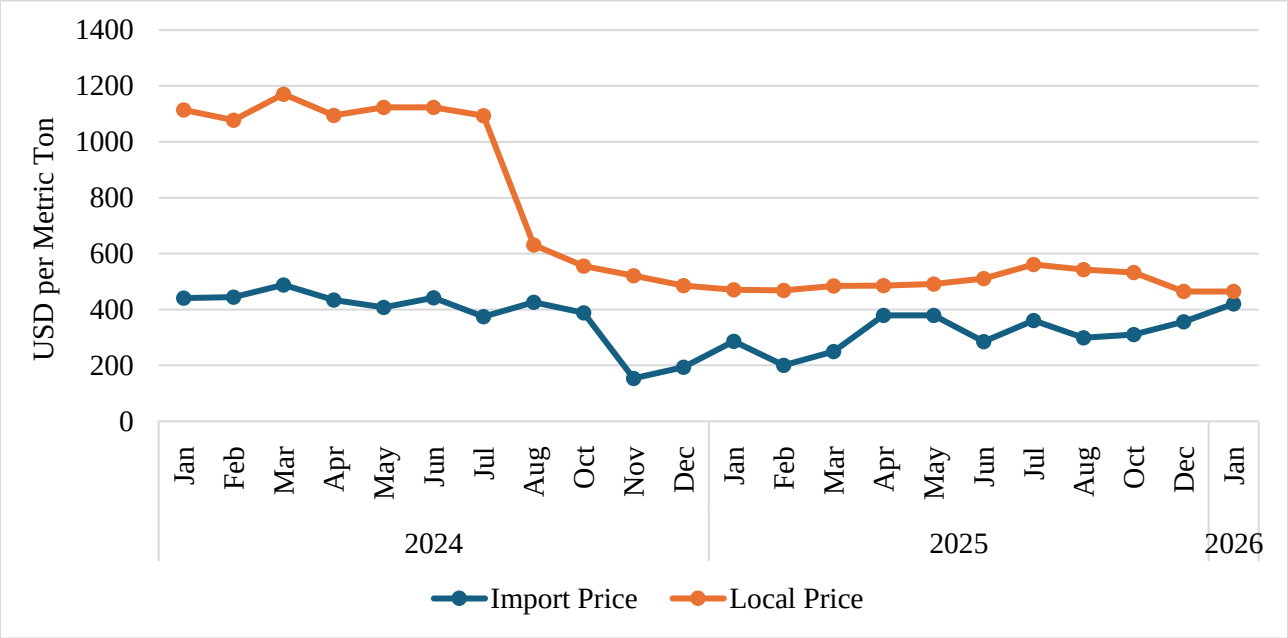


Source: National Bank of Ethiopia (NBE)

Between August 2024 and February 2026, the Ethiopian birr lost approximately 107 percent of its value, gasoline prices rose by 56 percent, and imported fertilizer prices increased by up to 60 percent. Fertilizer distribution delays and transportation disruptions due to conflict have further intensified these pressures, contributing to localized shortages. Together, currency depreciation and elevated production costs have

significantly increased wheat production and distribution costs, contributing to higher domestic wheat prices across markets. Figure 5 presents a comparison of local and imported wheat prices.

Figure 5: Monthly Wheat Grain Import Prices vs Local Prices (2024-2026)



Source: Trade Data Monitor (TDM) and NMIS

Figure 5 indicates that imported wheat continues to hold a price advantage over domestically supplied wheat. In January 2026, imported wheat was priced at $420 per MT, around $45 lower than local wheat. Several millers noted that in the absence of imported shipments, domestic wheat prices could have risen above $645 per MT. This underlines the important role imported wheat plays in moderating price pressures and supporting overall market stability.

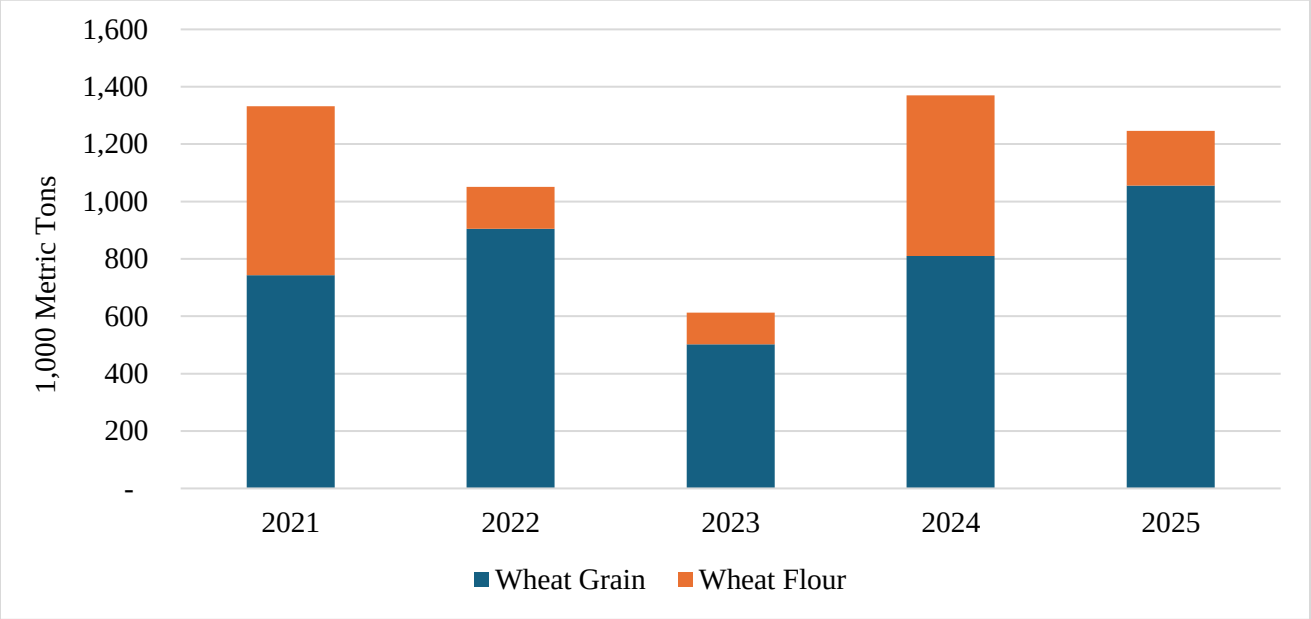
Trade

Post forecasts Ethiopia's wheat and wheat product imports at 1.4 million MT in MY 2026/27, as domestic demand is expected to keep growing faster than local supply. The import estimate for MY 2025/26 has been revised upward from 1.3 million to 1.4 million MT, reflecting expected import volumes during the remainder of the current marketing year. Imports of wheat (in grain equivalent) during the first five months of MY 2025/26 totaled 530,000 MT, with a monthly average import volume of 106,000 MT.

Millers report that tight domestic availability has led them to rely on imported wheat sourced through private traders. These traders use their own foreign exchange to purchase bulk wheat shipments from the Black Sea region on an FOB Port of Djibouti basis. The wheat is then sold to Ethiopian millers in smaller quantities from the Port of Djibouti, typically through letters of credit. This trading structure highlights the continued importance of imports in supporting market stability and meeting domestic demand. Post also observed imported wheat stocks prepared for processing at several flour mills during facility visits.

Post does not anticipate any wheat exports in MY 2026/27. Rising domestic demand, along with recurring supply tightness, limit the availability of exportable surpluses. There are currently no official records of commercial wheat exports from Ethiopia.

Figure 6: Ethiopia Imports of Wheat Grain and Wheat Flour (in Grain Equivalent)



Source: TDM

Over the five-year period MY 2020/21–2024/25, Ethiopia imported an average of 1.1 million MT of wheat in grain equivalent terms, excluding estimates of informal cross-border imports. Total imports peaked at 1.4 million MT in MY 2023/24, before easing to 1.3 million MT in MY 2024/25. During the same period, wheat grain imports averaged around 803,000 MT and consistently accounted for the majority of total volumes. Wheat flour imports averaged approximately 320,000 MT and showed greater year-to-year fluctuations. Imports include wheat imported for food assistance purposes.

The introduction of a 25 percent import duty on wheat flour in 2024, reduced the competitiveness of imported flour and reinforced the downward trend. Higher tariffs, combined with foreign exchange shortages and currency depreciation, have made imported flour less attractive compared to locally milled wheat products. Domestic millers generally favor wheat grain imports, as these support local processing, better use of milling capacity, and stronger control over margins. Taken together, these structural and policy factors indicate that wheat flour imports are likely to remain limited, while wheat grain continues to dominate Ethiopia's wheat import profile.

Table 2: Ethiopia Imports of Wheat and Wheat Products (in Grain Equivalent): Metric Tons

HS Code	Description	2023/24 (Oct-Sep)	2024/25 (Oct-Sep)	2025/26 (Oct-Feb)	% Change 2025/2024
1001	Wheat and meslin	810,240	1,055,841	509,241	30
1101	Wheat or meslin flour	559,399	190,267	21,349	-66
190230	Pasta, prepared, nesoi	709	1,150	377	62
190219	Pasta (spaghetti, macaroni, etc.), uncooked, not stuffed or otherwise prepared, not containing eggs	2,794	965	326	-65
190240	Couscous	57	305	69	435
190430	Bulgur wheat, pre-cooked or otherwise prepared	2	1	0	-50

Source: TDM

Table 3: Ethiopia's Import Volume of Wheat Grain by Partner Country

Partner Country /Marketing Year	Volume: MT			Market Share (%)	Change 2025/2024	
	2023/24 (Oct-Sep)	2024/25 (Oct-Sep)	2025/26 (Oct-Feb)	2024/25	Volume: MT	%
Russia	650,955	713,999	229,462	68	63,044	10
Ukraine	21,949	162,612	57,565	15	140,663	641
Romania	84,275	109,593	185,792	10	25,318	30
Turkey	2,611	37,056	57,635	4	34,445	1319
Bulgaria	0	9,000	0	1	9,000	0
India	8,296	6,900	12	1	(1,396)	-17
Iraq	0	1,500	0	0	1,500	0
China	1,710	1,500	136	0	(210)	-12
Sub-Total	769,796	1,042,160	530,602	99	272,364	37
Others	40,444	13,681	761	1	(26,763)	-66
Total	**810,240**	**1,055,841**	**531,363**	**100**	**245,601**	**30**

Source: TDM

In MY 2024/25, Ethiopia imported 1.06 million MT of wheat grain, representing a 30 percent increase compared to the previous year. Russia remained the leading supplier, exporting 714,000 MT, equivalent to 68 percent of total imports, reflecting a 10 percent increase year-on-year. Ukraine ranked second with 163,000 MT, accounting for 15 percent of the total, followed by Romania at 110,000 MT, or 10 percent. Together, these three suppliers accounted for 93 percent of Ethiopia's wheat grain imports, underscoring the country's continued reliance on Black Sea origins, primarily due to their competitive pricing in the milling wheat segment.

Post factors approximately 330,000 MT per year to the annual import figures to account for estimates of informal cross-border trade of wheat, wheat flour, and pasta products. Post estimates total wheat and wheat product imports during MY 2024/25 at 1.58 million MT.

The tariff on wheat grain consists of a five percent import duty, a 15 percent Value Added Tax (VAT), and a three percent withholding tax. To safeguard the domestic milling industry, a 25 percent tariff is imposed on imported wheat flour.

Table 4: Ethiopia's Tariff Structure for Wheat Grain and Wheat Flour (percent)

HS Code	Description	DR	ER	VAT	WHR	D2R	DSR
10011000	Durum Wheat	5	0	15	3	0	0
10011100	Durum wheat, seed	0	0	15	3	0	0
10011900	Durum wheat, other	5	0	15	3	0	0
10019000	Spelt, common wheat and meslin	5	0	15	3	0	0
10019100	Wheat and meslin, seed	0	0	15	3	0	0
10019900	Wheat and meslin, not durum wheat, other than seed	5	0	15	3	0	0
11010010	Wheat and meslin flour	25	0	15	3	10	0

Source: Ethiopian Customs

Note: DR=Duty Rate; ER=Excise Rate; VAT=Value Added Tax; WHR=Withhold Rate; D2R=Duty 2nd Schedule Rate; DSR= Duty 2nd Schedule Special Rate

Stocks

Post forecasts wheat grain stocks for MY 2026/27 at 1.18 million MT, 20 percent higher than post's MY 2025/26 estimate. The projected increase in the ending stocks also reflects the anticipated growth in local production and sustained imports as well as expected policy measures to strengthen national strategic grain reserves. These wheat stocks are held across public strategic reserves, primarily for emergency relief and market stabilization as well as private inventories managed by millers, traders, and farmers' cooperative unions.

Policy

The Ethiopian Disaster Risk Management Proclamation No. 1386/2025 was issued on July 28, 2025, which includes steps to build formal disaster reserve stocks at federal and regional level and strengthen emergency response capacity. Under this policy, modern warehouses and strategic reserve capacity will be expanded. To finance this initiative, a national disaster response fund was established as of February 2026. The disaster response fund raises revenue through fees and charges applied to digital transactions and other services including telecom, banking, and insurance. The policy aims to enhance national resilience by improving response readiness and reducing reliance on external aid.

Table 5: Wheat Production, Supply, and Distribution

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1950	1910	2000	1950	0	2050
Beginning Stocks (1000 MT)	803	803	978	983	0	983
Production (1000 MT)	6200	6200	6400	6500	0	7000
MY Imports (1000 MT)	1575	1580	1500	1400	0	1400
TY Imports (1000 MT)	1455	1425	1500	1560	0	1435
Total Supply (1000 MT)	8578	8583	8878	8883	0	9383
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	400	400	450	450	0	500
FSI Consumption (1000 MT)	7200	7200	7450	7450	0	7700
Total Consumption (1000 MT)	7600	7600	7900	7900	0	8200
Ending Stocks (1000 MT)	978	983	978	983	0	1183
Total Distribution (1000 MT)	8578	8583	8878	8883	0	9383
Yield (MT/HA)	3.1795	3.2461	3.2	3.3333	0	3.4146

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

CORN

Production

Post forecasts MY 2026/27 corn production at 10.5 million MT, up 2.9 percent over MY 2025/26. Harvested area is forecast to increase by two percent year-on-year. Corn cultivation area in Ethiopia has remained relatively stable at approximately 2.6 million hectares. Yields have gradually improved due to increased adoption of improved hybrid seed varieties, enhanced agronomic practices, and expanded extension services.

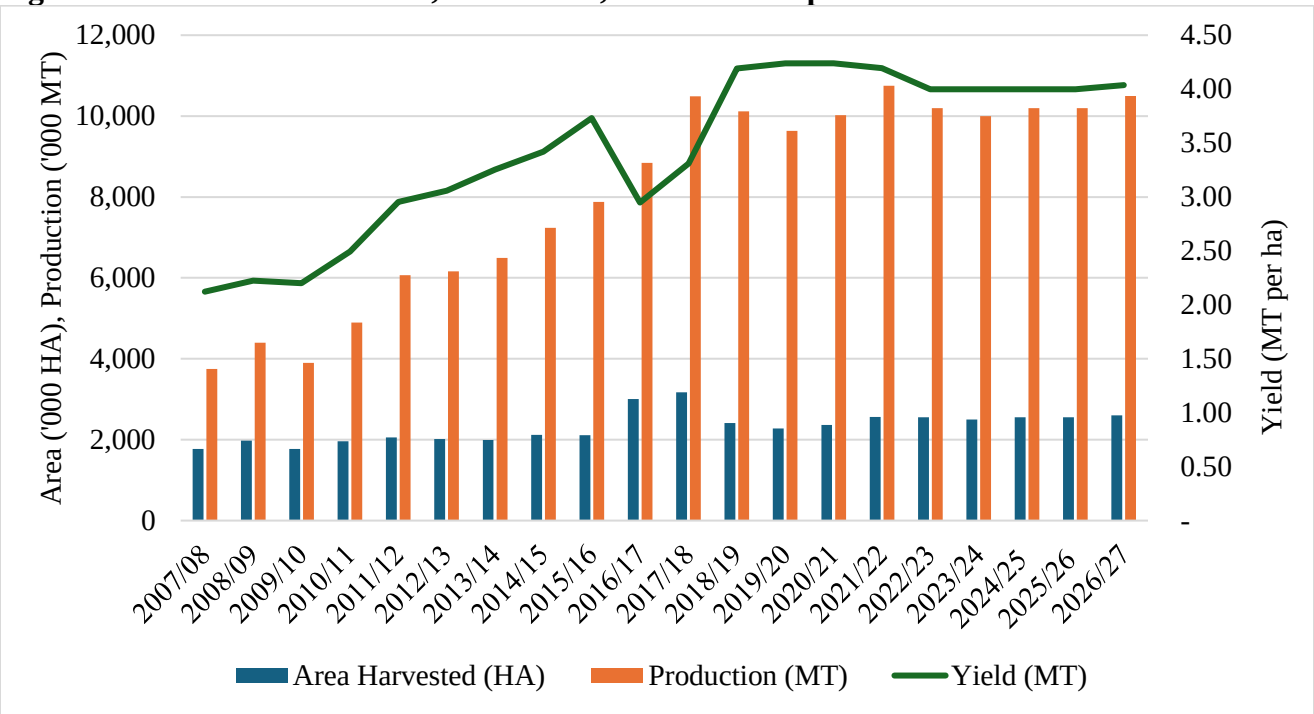
Post revised the MY 2025/26 corn production estimate down to 10.2 million MT from 10.3 million MT to account for production shortfalls in some moisture-stressed areas of the eastern part of the country and flood-affected areas in the southwestern region. Overall, corn production in the current marketing year remains largely stable, supported by generally favorable *meher* season rainfall across key producing zones in western Oromia and parts of Amhara. Grain quality has been good, with no major pest infestations or crop diseases reported.

While yields for MY 2025/26 are expected to remain steady in major surplus-producing areas, localized production shortfalls are projected in some South Ethiopia districts because of poor *kirmet* rains and flooding in some areas of southwestern region. Additionally, production in some drought affected zones, including East Hararge and West Hararge, is constrained due to delayed onset of *meher* rains at the planting stage and erratic rainfall distribution throughout the main crop season. These conditions reportedly resulted in crop failures in those areas.

Oromia region produces approximately half of Ethiopia's corn, benefiting from favorable mid-altitude agro-ecologies with good rainfall distribution and productive soils. The main surplus-producing zones include West Shewa, East and West Wollega, Jimma, and Arsi. Amhara region contributes roughly one-quarter of national corn output, primarily from mid- and high-altitude farming systems. The region's principal corn-producing zones are East Gojjam, West Gojjam, North Gondar, South Gondar, and Awi, and parts of North Shewa.

Corn production in Ethiopia is predominantly rainfed. Studies indicate that 95 percent or more of total corn output is derived from rain-fed production systems. In contrast, irrigated corn contributes only a marginal share, typically accounting for between two and five percent of total production.

Figure 7: Corn Cultivated Area, Production, Yield in Ethiopia



Source: USDA and Post Estimate

Ethiopia's corn production for MY 2026/27 is forecast to increase, supported by the anticipated rollout of genetically engineered (GE) corn varieties and higher adoptions of hybrid seeds. Improved corn varieties developed by national breeding programs, along with hybrids introduced by international seed companies, are anticipated to further catalyze the increase in corn production. Researchers indicate that more than 90 percent of local farmers have adopted hybrid corn varieties.

Looking ahead, the relaxation of export restrictions and the formalization of cross-border trade under the AfCFTA are expected to offer large-scale commercial farmers stronger market incentives to expand corn cultivation. Rising demand for livestock feed, combined with favorable domestic corn prices this year, is also likely to encourage higher production levels.

Consumption

Total domestic corn consumption is projected to reach 10.5 million MT in MY 2026/27, a 1.4 percent increase over the previous year on rising demand for both food and animal feed.

Corn remains Ethiopia’s most widely consumed grain, playing a central role in the national diet and food security. About 80 to 85 percent of total corn consumption is for human use, reflecting its staple status and integration into traditional foods such as injera, kitta, bread, porridge, and local beer. Corn consumption is estimated at 66 kg per capita annually, making it the leading grain in individual dietary intake. This high consumption rate is supported by corn's relative affordability (compared to other staple grains: wheat, teff, or sorghum), widespread cultivation across agro-ecological zones, and cultural acceptance as a versatile food grain.

The local brewing industry uses corn grits processed from corn as a cost-effective, high-starch ingredient to lighten beer body, color, and flavor. A significant volume of fresh corn is consumed in roasted and boiled form in both rural and urban areas. It is also a key ingredient in making a traditional low-alcohol cereal beverage often used as a meal substitute or light refreshment, especially in the southern and southwestern parts of Ethiopia.

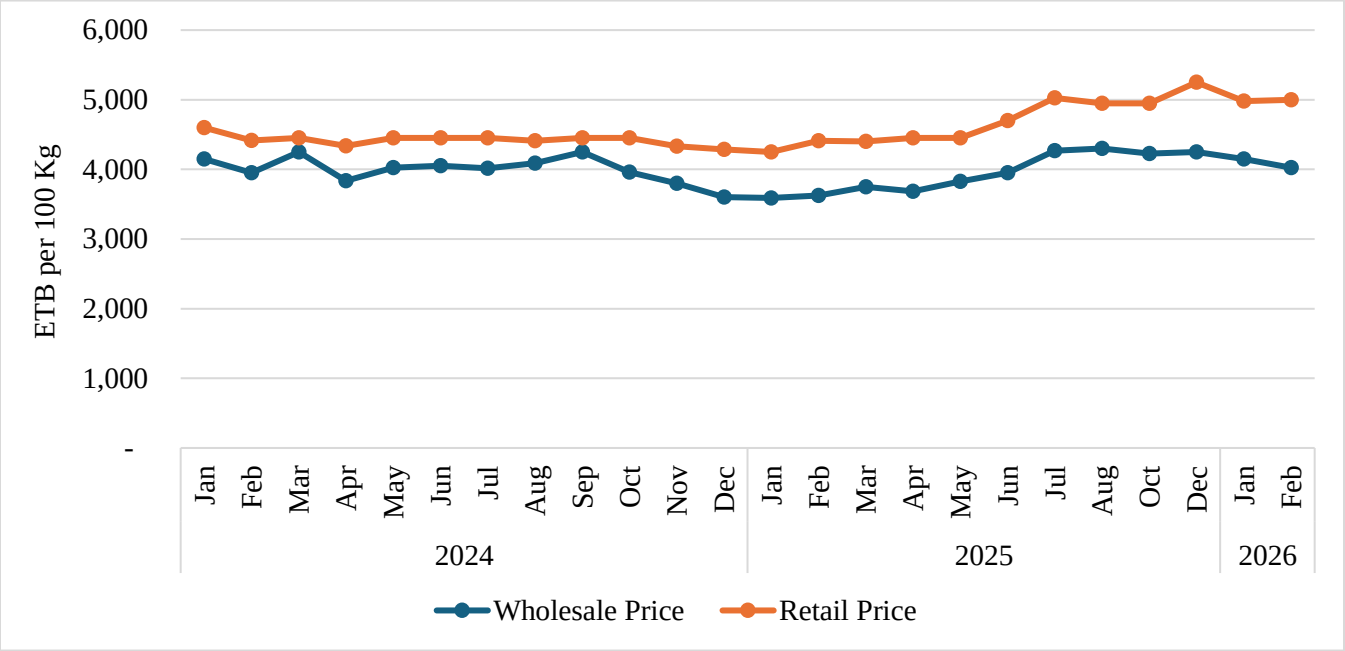
The remaining 15 to 20 percent serves as animal feed, seed stock, and limited industrial processing inputs. Corn is a key ingredient in poultry rations, typically comprising 50 to 60 percent of the feed mix. A study published in 2024 shows that total compound feed production was estimated at approximately 5.8 million MT dry matter per annum. The main ingredients used in the preparation of compound feed include corn, sorghum, by products from flour processing such as wheat bran, rice bran, oilseed cakes, brewery and distillery by-products, and sugar factory by-products. Oilseed cakes include soybean meal, Niger seed cake, linseed cake, groundnut cake, cottonseed cake, and other similar materials. Ethiopia's National Poultry Development Strategy 2022-2031 sets ambitious targets for the livestock sector, which would drive animal feed demand to rise substantially. Red meat production is targeted to increase nearly fivefold, from about 294,000 MT in 2020 to approximately 1.8 million MT by 2030. Milk production is also targeted to more than double, increasing from 4.3 million liters in 2020 to 11.6 million liters by 2030. Similarly, poultry production is targeted to expand over the same period. Poultry meat output per the strategy is projected to rise from 48,000 MT to 106,000 MT, while egg production is expected to increase from 2.8 billion to 5.5 billion eggs.

Corn consumption in Ethiopia is projected to grow steadily, underpinned by several factors: continued urbanization, population expansion, a thriving food processing sector, and growing preference for corn as a more affordable substitute staple crop among urban and rural households. With the expansion of agro-processing industries, corn-based flour and snacks are increasingly emerging, particularly among urban consumers.

Prices

Throughout 2025 and into early 2026, corn prices exhibited typical seasonal patterns. Prices rose during the lean season (June - August 2025), driven by tighter domestic supply and strong demand. After peaking in mid-2025, prices eased following the *meher* harvest (October - December).

Figure 8: Monthly Average Retail and Wholesale White Corn Prices (2024-2026)



Source: NMIS

Comparing February 2025 and February 2026, the wholesale price of corn increased from 3,625 ETB to 4,025 ETB, an 11 percent increase. The retail price increased from 4,413 ETB to 5,000 ETB, a 13 percent increase over the same period. This indicates that both wholesale and retail prices saw significant upward adjustments, with retail prices rising slightly faster than wholesale, reflecting widening margins or higher consumer-level pressure.

Retail prices of corn in February 2026 remain elevated relative to January 2024 levels due to sporadic supply chain disruptions linked to localized security challenges in major producing areas, rising input and transportation costs, and localized drought conditions in southern and eastern regions that continue to exert upward pressure on prices.

Trade

Corn exports are forecast at 75,000 MT in marketing year 2026/27, up from 50,000 MT in MY 2025/26. The forecast is based on both higher local production and growing demand for corn from neighboring countries like Kenya, which is facing supply shortfalls. The upward revision for MY 2025/26 also reflects the resumption of corn exports to neighboring countries.

In the current marketing year, corn exports were shipped entirely to Kenya, marking a notable development, as Ethiopia's last recorded official corn exports to Kenya were 63,000 MT in MY 2016/17. Corn imports remain minimal, with total volumes in MY 2024/25 below 3,000 MT.

Industry contacts report informal cross-border corn trade along the Ethiopia-Kenya border but that remains largely unquantified. A regional review by the World Bank on cross-border trade in the Horn of Africa indicates that several hundred to a few thousand metric tons of corn are exported from Ethiopia to

Kenya each month through informal channels, depending on seasonal supply and demand conditions. These cross-border exports are most common during periods of domestic shortfall in Kenya. However, monitoring data from the FEWS NET East Africa Cross-Border Trade Bulletin show high variability in some reporting periods recorded informal corn volumes at specific Ethiopia-Kenya border points were minimal, amounting to only a few metric tons over an entire quarter. This amplifies both the volatility of informal trade flows and the limitations to quantify the trade volumes.

The relaxation of export restrictions, formalization of cross-border trade, and the launch of trade under the AfCFTA framework are expected to open regional markets, particularly in East Africa, where corn is a major staple. This development provides commercial farmers and traders with stronger market incentives to pursue export opportunities. However, industry experts cautiously note that realizing increased export volumes depends on several critical factors such as competitive pricing relative to other regional suppliers and enhanced logistics infrastructure.

Ethiopia historically imposed export controls on key staple grains, including teff, corn, and sorghum, to ensure domestic food security and stabilize local supply and prices. While exports were generally prohibited, authorities occasionally allowed case-specific shipments to neighboring countries when domestic supply conditions were deemed sufficient. Under Ethiopia's broader trade liberalization and economic reform agenda and following the launch of trade under the AfCFTA framework in October 2025, export restrictions on staple grains, including corn, have reportedly been eased. Industry sources indicate that commercial farmers and licensed traders who meet all regulatory requirements are now permitted to export these crops.

Table 6: Ethiopia's Tariff Structure for Corn (percent)

HS Code	Description	DR	ER	VAT	WHR	D2R	DSR
10051000	Corn (maize) seed	0	0	15	3	0	0
10059000	Corn (maize), other	5	0	15	3	0	0
11022000	Corn (maize) flour	15	0	15	3	0	0
11031300	Corn (maize), groats and meal	15	0	15	3	0	0
11042300	Corn (maize), hulled, pearled, sliced or kibbled	15	0	15	3	0	0
11081200	Corn (maize) starch	5	0	15	3	0	0
07104000	Sweet corn	15	0	15	3	0	0

Source: Ethiopian Customs

Stocks

Post forecasts MY 2026/27 ending stocks at 500,000 MT. Private traders, feed mills, and food processors maintain corn stocks. For MY 2025/26, Post estimates ending stocks at 575,000 MT.

Table 7: Corn Production, Supply, and Distribution

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2550	2550	2600	2550	0	2600
Beginning Stocks (1000 MT)	875	875	825	775	0	575
Production (1000 MT)	10200	10200	10300	10200	0	10500
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	11075	11075	11125	10975	0	11075
MY Exports (1000 MT)	0	50	0	50	0	75
TY Exports (1000 MT)	0	50	0	50	0	75
Feed and Residual (1000 MT)	1250	1250	1300	1300	0	1350
FSI Consumption (1000 MT)	9000	9000	9050	9050	0	9150
Total Consumption (1000 MT)	10250	10250	10350	10350	0	10500
Ending Stocks (1000 MT)	825	775	775	575	0	500
Total Distribution (1000 MT)	11075	11075	11125	10975	0	11075
Yield (MT/HA)	4	4	3.9615	4	0	4.0385

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

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SORGHUM

Production

Sorghum production in MY 2026/27 is forecast at 4.1 million MT, five percent higher than the previous year's estimate of 3.9 million MT. Post lowered the MY 2025/26 production estimate reflecting production shortfalls caused by erratic rainfall, flooding, and drought conditions. These weather disruptions delayed crop development and resulted in localized crop losses, particularly in East and West Hararghe, which are expected to reduce national sorghum output.

The harvested area in MY 2026/27 is forecast to remain at 1.65 million hectares, broadly in line with recent years. From its peak of 1.92 million hectares in 2011/12, sorghum area has gradually declined as farmers shift to competing crops such as corn, rice, sesame seed, soybeans, and cotton, which often offer stronger market returns. In addition, ongoing security challenges in key producing regions are likely to further limit production.

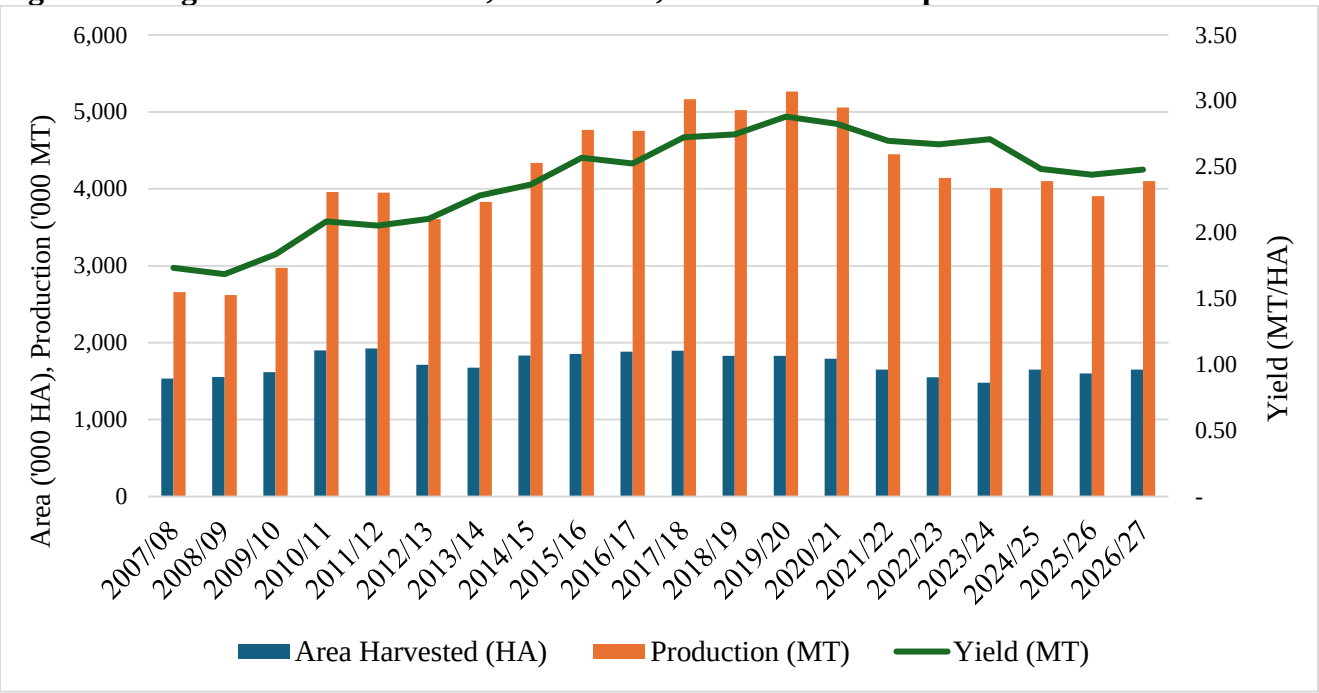
Sorghum remains a key crop in Ethiopia, where it ranks as the fourth most widely produced grain. The main producing regions are Oromia, Amhara, and Tigray. Within Oromia, East Hararghe, West Hararghe, and Jimma zones are leading producers. In Amhara, North Gondar, North Shewa, and South Wollo are major growing areas, while Western, Central, and Southern zones dominate production in Tigray.

Despite its importance, sorghum production has faced ongoing challenges. Yields have declined in recent years due to limited access to improved seed, fertilizer, and crop protection inputs, as well as weak market integration and modest domestic demand. Recurrent drought, pest pressure, and security disruptions in major growing areas have further limited output.

No major pest infestations were reported in sorghum fields for MY 2025/26. Striga infestation is one of the most serious biological constraints in sorghum production in Ethiopia. Although striga resistant dwarf varieties developed locally have been released, adoption remains limited. Many farmers continue to favor traditional tall varieties because they provide more biomass, which is valued for livestock feed and widely used as a substitute for fuelwood, fencing, and basic construction materials.

To address these constraints, the GOE is developing a National Sorghum Flagship Program. The initiative aims to raise productivity and expand market participation by promoting improved seed varieties, better agronomic practices, and stronger extension services. It also seeks to strengthen processing capacity and value chain linkages for smallholder farmers. By encouraging more commercial production, improving input supply systems, and enhancing market integration, the program aims to boost food security, increase farm incomes, and improve competitiveness in regional and international markets.

Figure 9: Sorghum Cultivated Area, Production, and Yield in Ethiopia



Source: USDA and Post Estimate

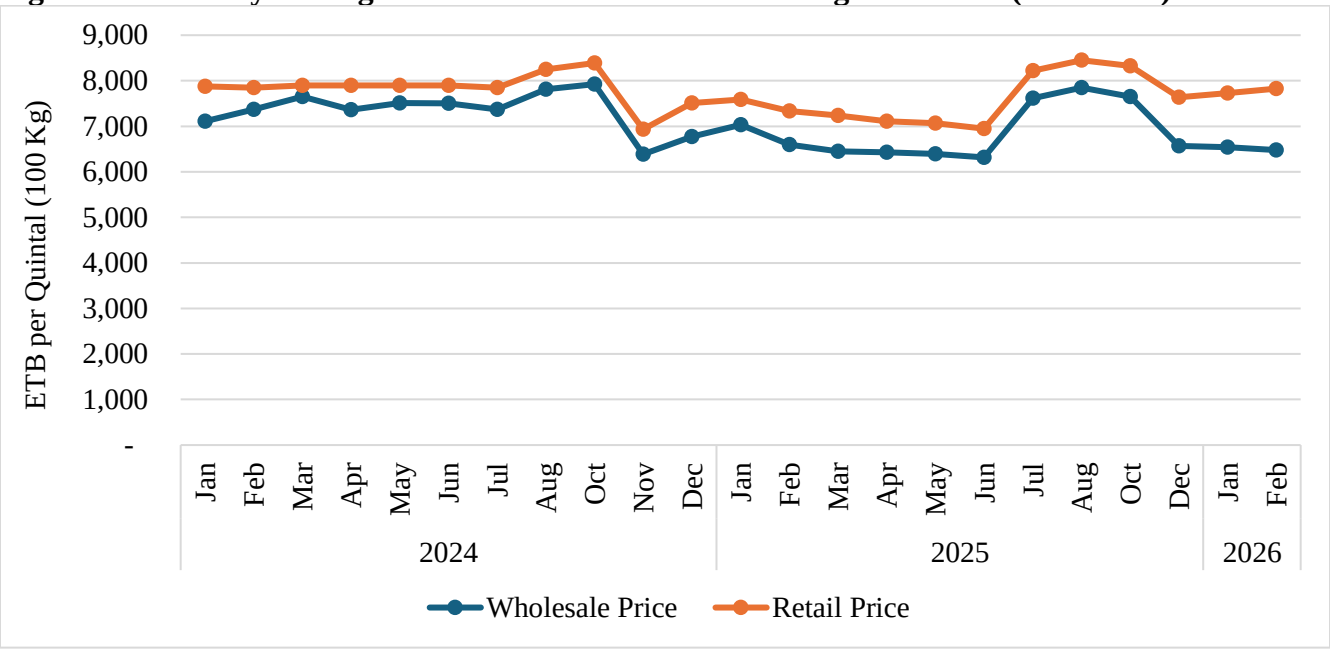
Consumption

Sorghum consumption in MY 2026/27 is forecast at 4.2 million MT, which is four percent higher than MY 2025/26 estimate. The increase is mainly based on higher production. Sorghum consumption is down from MY 2024/25 based on reductions in food assistance, which includes sorghum as a primary cereal in the ration.

Sorghum remains a staple food in Ethiopia and is widely used for human consumption. Its drought tolerance makes it especially important for food security in moisture stressed areas. Annual per capita consumption is estimated at around 31 kilograms. Demand is strongest in rural communities, particularly in Amhara, Oromia, and Tigray regions. Sorghum is commonly consumed as injera, porridge, and nifro, which is a whole boiled grain. It is also used to produce traditional alcoholic beverages such as tella and areke.

In recent years, sorghum has increasingly been blended with teff flour to prepare injera as a lower cost option, amid high teff prices and tight supplies. Because teff is the most expensive staple grain, many households substitute sorghum to reduce food costs. Beyond direct food use, sorghum is gaining importance in livestock feed and small-scale processing, including flour, snack products, and baby food. Its role in animal feed is expanding, with potential to help meet the country's growing demand for poultry feed.

Figure 10: Monthly Average Retail and Wholesale White Sorghum Prices (2024-2026)



Source: NMIS

Trade

Post forecasts sorghum imports in MY 2026/27 at 95,000 MT. The United States remained the leading supplier of grain sorghum for food assistance programs in Ethiopia in MY 2024/25. No formal exports of grain sorghum are expected in the coming year.

Table 8: Ethiopia's Tariff Structure for Sorghum (percent)

HS Code	Description	DR	ER	VAT	WHR	D2R	DSR
10071000	Sorghum, seed	0	0	15	3	0	0
10079000	Grain Sorghum, other than seed	5	0	15	3	0	0

Source: Ethiopian Customs

Table 9: Sorghum Production, Supply, and Distribution

Sorghum	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1650	1650	1650	1600	0	1650
Beginning Stocks (1000 MT)	70	70	173	85	0	50
Production (1000 MT)	4100	4100	4100	3900	0	4100
MY Imports (1000 MT)	303	330	50	90	0	95
TY Imports (1000 MT)	303	330	50	90	0	95
Total Supply (1000 MT)	4473	4500	4323	4075	0	4245
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	50	65	50	50	0	60
FSI Consumption (1000 MT)	4250	4350	4200	3975	0	4125
Total Consumption (1000 MT)	4300	4415	4250	4025	0	4185
Ending Stocks (1000 MT)	173	85	73	50	0	60
Total Distribution (1000 MT)	4473	4500	4323	4075	0	4245
Yield (MT/HA)	2.4848	2.4848	2.4848	2.4375	0	2.4848

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Sorghum begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

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BARLEY

Production

Total barley production for MY 2026/27 is forecast at 2.5 million MT, up four percent from the MY 2025/26 estimate. Stronger price incentives are driving this growth, despite rising input costs and some shifts toward more profitable crops such as wheat. While national research programs have introduced improved barley varieties, particularly for malting quality, productivity gains remain uneven, with average yields around 2.5 MT per hectare. Production continues to be constrained by post-harvest losses, pest and disease pressures, climate variability, and limited mechanization. Industry sources note that the 2025/26 crop shows improved quality compared to the previous year.

Historically concentrated in the southeastern highlands, barley cultivation has expanded into central, northwestern, and northern highlands. Barley remains a staple crop in Ethiopia's highlands, particularly in Oromia, Amhara, and Tigray, where altitude and rainfall favor cultivation. Two-rowed barley, cultivated mainly in high-altitude areas, is preferred for malting due to its higher carbohydrate content, while six-rowed barley is used for traditional foods. Studies indicate that food barley accounts for roughly 90 percent of total production, with malt barley representing about 10 percent. Key barley-producing zones include Arsi, Bale, and North Shewa in Oromia, and North Gondar and West Gojjam in Amhara, all with strong potential for both food and malting varieties.

Investments from multinational malting and brewing companies have improved access to quality seed, extension services, and structured markets. In the medium term, continued growth of the malting and brewing sector is expected to support further expansion of barley production. Production growth is increasingly supported by brewery-led contract farming, certified seed distribution, and value chain interventions from development partners. Yet structural challenges such as poor rural infrastructure, fragmented landholdings, inconsistent quality standards, and limited malting capacity continue to limit output.

Consumption

Post forecasts total domestic consumption of barley in MY 2026/27 at 2.6 million MT, a five percent increase from the previous year. Rising demand for food, malt production, and animal feed drives this growth. Barley remains a staple in Ethiopia, especially in highland regions.

Household consumption of whole grain barley remains high in rural areas, where families prepare staple dishes such as porridge, bread, injera, roasted snacks (kollo), beso, chuko, kinche, shorba, and traditional drinks like tella. Urban demand for processed barley products including finely milled flour and emerging barley bread and snacks is increasing, driven by bakeries, snack producers, and health-conscious consumers.

Malted barley has become strategically important for breweries, with local sourcing supported through contract farming, backward integration, and government-backed seed and extension programs. A 2023 study showed that the malting and brewing industry accounts for approximately 45 percent of total malt barley demand, making it the largest single consumer. The commercial food and beverage sector uses 23 percent, households consume 27 percent, and farmers reserve five percent for seed. Industry analysts estimate that total demand for malt barley by the malting and brewing sectors is around 265,000 MT,

with capacity utilization rates exceeding 85 percent. Analysts project 15 percent growth in Ethiopia's beer and non-alcoholic beverage market over the next decade, potentially pushing malt barley demand beyond 300,000 MT within five to seven years.

Industrial demand from breweries represents the fastest-growing segment, incentivizing smallholders to adopt improved malting varieties and participate in contract farming schemes. Overall, continued expansion of the malting and brewing sector, growing urbanization, and emerging opportunities in processed and functional barley products is expected to sustain demand. Climate variability, post-harvest losses, and competition from other cereals, particularly wheat, will remain important considerations for future consumption trends.

Trade

Barley imports for MY 2026/27 are projected at 90,000 MT, well above the five-year average of 28,000 MT, driven by strong demand from the malting and brewing industries. While domestic production meets approximately 95 percent of brewery demand, imports remain necessary to cover occasional supply shortfalls.

Barley trade remains largely domestic oriented, with no exports due to limited surplus and quality constraints.

Prices are highly seasonal. Farm gate prices typically rise during the lean period from June to September and ease after harvest between October and December. Malting grade barley earns a premium over food grade because of strong industrial demand.

The GOE issued Excise Tax (Amendment) Proclamation No. 1287/2023 and Excise Tax Rates Adjustment Directive No. 1007/2024 to encourage the use of local raw materials in the brewing industry. Under the latest directive, beer brewed entirely from barley grown and malted in Ethiopia faces a lower excise rate than beer made mostly from imported inputs. Beverages that use at least 75 percent of local ingredients (excluding water) are taxed at a reduced rate compared with those with lower local content. These tiered rates aim to make locally sourced barley more attractive to brewers and to support farmers supplying malting quality grain.

Table 10: Excise Tax Rate on Alcoholic Beverage - Beer

Tariff No.	Description	Excise Tax Rate
2203.0000	Beer made from malt	40% or 28 birr per liter, whichever is higher
	Beer produced exclusively from barley grown and malted in Ethiopia	35% or 23 birr per liter, whichever is higher
	Beer with local raw material content of at least 75% by weight (excluding water)	30% or 21 birr per liter, whichever is higher

Source: Excise Tax Rates Adjustment Directive No. 1007/2024

Table 11: Ethiopia's Tariff Structure for Barley and Malt (In percentage)

HS Code	Description	DR	ER	VAT	WHR	D2R	DSR
10031000	Barley, seed	0	0	15	3	0	0
10039000	Barley, other than seed	5	0	15	3	0	0
11071000	Malt, not roasted	15	0	15	3	0	0
11072000	Malt, roasted	15	0	15	3	0	0

Source: Ethiopian Customs

Table 12: Barely Production, Supply, and Distribution

Barley	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	980	960	980	970	0	990
Beginning Stocks (1000 MT)	99	99	134	69	0	79
Production (1000 MT)	2485	2300	2485	2400	0	2500
MY Imports (1000 MT)	50	80	75	85	0	90
TY Imports (1000 MT)	50	80	75	85	0	90
Total Supply (1000 MT)	2634	2479	2694	2554	0	2669
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	100	50	125	75	0	100
FSI Consumption (1000 MT)	2400	2360	2450	2400	0	2500
Total Consumption (1000 MT)	2500	2410	2575	2475	0	2600
Ending Stocks (1000 MT)	134	69	119	79	0	69
Total Distribution (1000 MT)	2634	2479	2694	2554	0	2669
Yield (MT/HA)	2.5357	2.3958	2.5357	2.4742	0	2.5253

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

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MILLET

Production

Ethiopia's millet production for MY 2026/27 is forecast at 0.95 million MT, representing a 15.6 percent decline from the previous year. The reduction is mainly driven by a roughly 10 percent contraction in harvested areas and lower yields. The crop performs best in mid- to high-altitude areas with moderate rainfall and is prized for its nutritional content, storage durability, and adaptability to challenging conditions. Despite its importance, average yields remain low at around 2.38 MT per hectare, mainly constrained by traditional farming practices, limited use of improved seed varieties, poor soil fertility, pest and disease pressure, and socioeconomic factors such as insufficient market access.

Farmers continue to shift land toward higher return grains such as corn and teff, which benefit from stronger market demand, better extension services, and improved access to inputs. In addition, national support for millet in terms of research investment, varietal development, and extension outreach remains limited.

Millet is a key grain in Ethiopia, widely cultivated across semi-arid regions, including northern, northwestern, western areas, and West Hararghe, as well as parts of Tigray, Amhara, and Oromia regions. Farmers value it for its drought resilience, diverse uses in food, feed, and local beverages, and its contribution to food security. Ongoing conflict in some major producing areas has further disrupted production, contributing to the overall decline.

Consumption

Millet consumption in MY 2026/27 is forecast at 950,000 MT, down 16 percent from the previous year, mainly due to reduced local production as farmers shift towards more profitable crops. Millet consumption in Ethiopia is declining as households, especially in urban areas, shift toward higher-demand grains like teff, sorghum, wheat, and corn. This trend is driven by urbanization, changing dietary preferences, limited commercial processing of millet, and greater market availability of alternative grains.

While millet is less common in Ethiopia's urban food markets, it remains an essential staple in rural communities, particularly in Amhara and the lowland areas of Oromia, Tigray, and the Southern regions. Households in these areas rely on millet for traditional dishes such as porridge, flatbread, and fermented drinks. Its resilience to harsh climates and strong nutritional value make it especially important during droughts or crop failures. Nevertheless, overall consumption of millet remains lower compared with more dominant staples like teff and sorghum.

Trade

There is no formal trade of millet, though informal transactions occur in border regions.

Table 13: Millet Production, Supply, and Distribution

Millet	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	455	450	455	445	0	400
Beginning Stocks (1000 MT)	10	10	5	10	0	5
Production (1000 MT)	1125	1125	1100	1125	0	950
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1135	1135	1105	1135	0	955
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	30	25	25	30	0	25
FSI Consumption (1000 MT)	1100	1100	1075	1100	0	925
Total Consumption (1000 MT)	1130	1125	1100	1130	0	950
Ending Stocks (1000 MT)	5	10	5	5	0	5
Total Distribution (1000 MT)	1135	1135	1105	1135	0	955
Yield (MT/HA)	2.4725	2.5	2.4176	2.5281	0	2.375

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Millet begins in October for all countries. TY 2026/2027 = October 2026 - September 2027

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Attachments:

No Attachments