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Report Highlights:

Post forecasts Ethiopia's wheat production to reach 6.5 million metric tons (MT) in MY 2025/26, driven by improved yields and expanded irrigated farmland. In the same period, wheat imports are projected to decline by 24 percent to 1.3 million MT. Although domestic demand remains strong, commercial wheat imports are anticipated to fall gradually as local production improves. Recent macroeconomic and trade policy reforms including the shift to a market-based foreign exchange system, removal of the Franco-Valuta duty free import scheme, and the introduction of new tariffs on flour imports are also reshaping Ethiopia's import dynamics.

Executive Summary

Wheat and corn production in MY 2025/26 are forecast to increase modestly, reaching 6.5 million and 10.3 million MT, respectively. This growth is supported by improved inputs, expanded irrigation, and enhanced farming practices. Challenges such as rising production costs and regional conflict persist. In contrast, sorghum and millet outputs are expected to decline slightly due to land competition, drought, and conflict. Barley production is expected to rise to 2.38 million MT, propelled by strong market demand.

Wheat consumption is projected to increase to 7.82 million MT, fueled by rapid urbanization, population growth, and rising demand for processed wheat products. Corn consumption is forecast at 10.35 million MT driven by both food and feed use. In addition, barley consumption is predicted to rise, fueled by growing demand from Ethiopia's malting and brewing industries.

Ethiopia is experiencing notable shifts in grain consumption and market dynamics, driven by rising prices and evolving policy measures. Domestic grain prices, including wheat, consistently exceed international prices due to high input costs and challenges regarding logistics and supply chain. Local wheat often costs more than imported wheat grain, particularly from lower-cost origins such as the Black Sea region.

Recent macroeconomic reforms and trade policy changes such as the adoption of a market-based foreign exchange system, local currency depreciation, and the removal of the Franco-Valuta duty free import scheme, and import tariffs are also expected to impact import trade. Ethiopia's introduction of a 25% tariff on wheat flour imports is expected to significantly curtail wheat flour import volumes.

Ethiopia's grain policy is focused on food security and import substitution. Key initiatives include expanding irrigated farming to boost productivity and move toward self-sufficiency. There are gains in domestic production due to improved yields and government-led efforts. Demand from millers and food manufacturers remains high, particularly for wheat. In the short term, commercial wheat imports will continue to play a critical role in bridging the supply gap and stabilizing the market. As local production scales up, import volumes are expected to gradually decline.

Overview

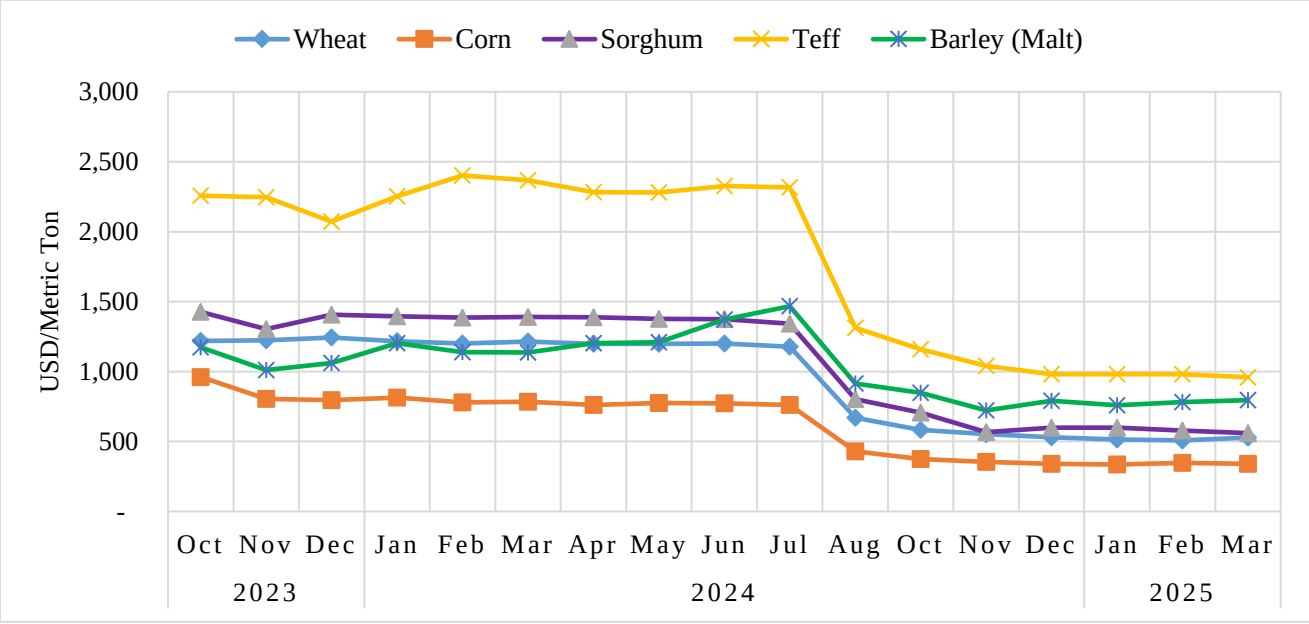
Wheat production is projected at 6.5 million MT, nearly a five percent increase from the previous year, supported by modest expansion in irrigation, improved inputs, and increased commercial cluster farming. Rising input costs persist along with ongoing wheat shortages and price hikes. Corn production is forecast at 10.3 million MT, up slightly from 10.2 million MT, with gains limited by conflict in key growing regions, although long-term prospects are bolstered by the adoption of high-yielding hybrids. Sorghum output is expected to decline slightly to 4.06 million MT, due to reduced harvested areas and challenges such as land competition from high-value crops including oilseeds, recurring droughts, and persistent security challenges. Barley production is forecasted to rise to 2.38 million MT, driven by favorable prices and strong demand from the expanding malting and brewing industry. Millet production is forecast at 1.10 million MT, reflecting a 2.2 percent decrease, largely attributed to limited access to improved inputs and conflict in major producing areas like Amhara.

Table1: Estimated Harvested Area, Production, and Yield: Major Grain Crops in Ethiopia

Crop	2023/2024			2024/2025			2025/2026		
	Area	Production	Yield	Area	Production	Yield	Area	Production	Yield
Wheat	1,900	5,900	3.11	1,910	6,200	3.25	1,950	6,500	3.33
Corn	2,500	10,000	4.00	2,550	10,200	4.00	2,550	10,300	4.04
Sorghum	1,480	4,010	2.71	1,650	4,100	2.48	1,635	4,055	2.48
Barley	980	2,450	2.50	960	2,300	2.40	970	2,380	2.45
Millet	450	1,120	2.49	455	1,125	2.47	445	1,100	2.47

Source: Post Estimate. [Area in '000 HA, production in '000 MT, and yield in MT/HA]

Figure 1: Monthly Average Retail Price[1] of Grain Crops in Ethiopia

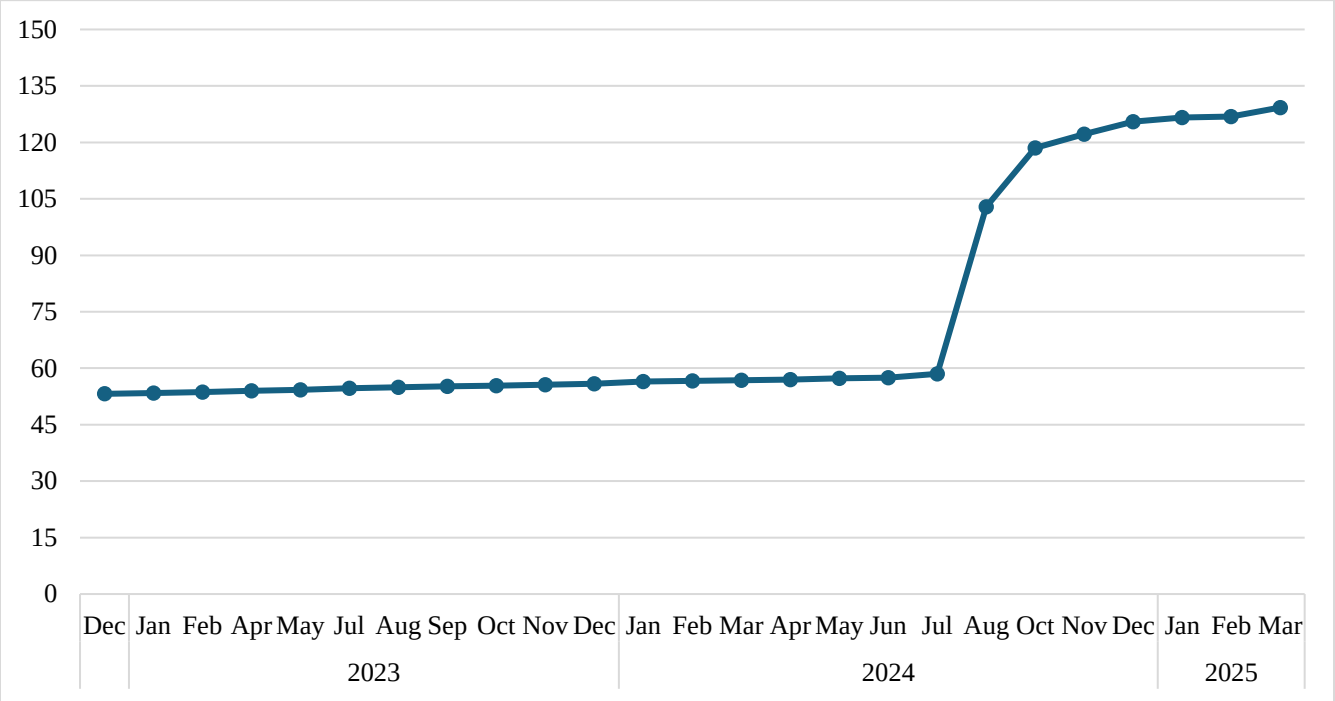


Source: National Market Information System (NMIS)

[1] The sharp decline in grain prices after the end of July 2024 was due to the implementation of a currency float system, where the exchange rate shifted from a fixed to a market-based foreign exchange system.

Soaring prices of grain staples, particularly teff and wheat, are triggering a noticeable shift in grain consumption patterns across Ethiopia, with households adapting to rising costs of living and urban lifestyles. The average retail price of teff at $960 per MT is now nearly double that of local wheat. This increase in prices has significantly influenced dietary choices, particularly in urban areas. Urbanization is also playing a key role, as growing urban populations increasingly opt for wheat-based foods like bread and pasta, which are quicker and easier to prepare. In contrast, teff, traditionally used to make injera, requires more time and effort to cook. The surge in teff and wheat prices, especially relative to other staple grains, is pushing households toward more affordable and locally available alternatives such as rice, sorghum, and maize.

Figure2: Ethiopia's Exchange Rate Devaluation: USD to ETB



Source: Exchange-rates.org

Note: Exchange rate:1 USD = ~130 ETB in March 2025.

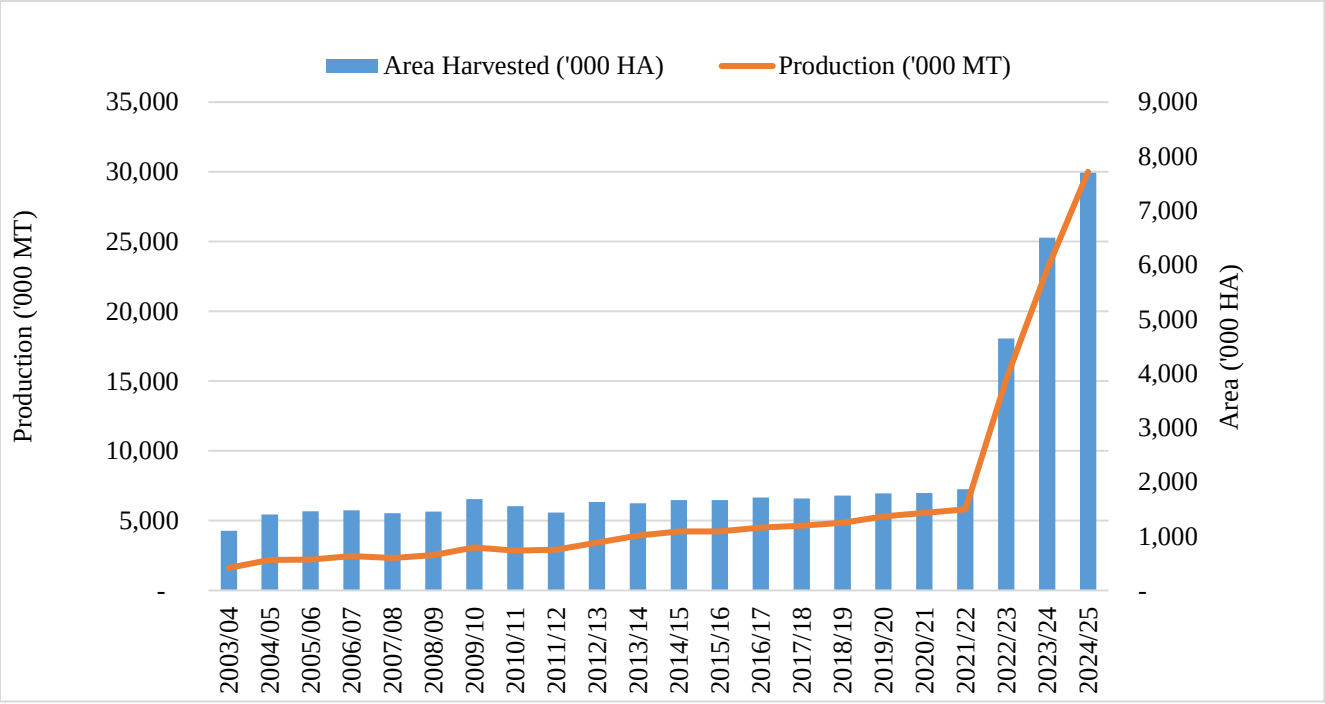
WHEAT

Production

Post projects Ethiopia's wheat production in Marketing Year (MY) 2025/26 to reach 6.5 million MT, reflecting a five percent increase compared to the estimated output for 2024/25. This growth is driven by a modest expansion in harvested area and an improvement in yield**.** The forecast assumes that there will be improved access to inputs such as high-yielding seed varieties, fertilizers, and enhanced farm management practices. The expansion of cluster farming, enhanced mechanization, and the growth of irrigation farming in lowland areas, along with favorable weather conditions in major rain-fed wheat areas, are expected to further boost productivity. However, rising input costs will remain a significant constraint, particularly for smallholder farmers. In terms of grain quality, this year's harvests showed good grain size, appearance, and grade— due to improved post-harvest handling and storage.

According to official Government of Ethiopia figures, wheat production in the 2024/25 crop season reached an estimated 30 million MT, covering 7.7 million hectares across both rain-fed and irrigated areas. This growth marks a more than fourfold increase in production volume and a threefold expansion in cultivated areas compared to the 2021/22 season. Market players report concerns about wheat shortages and elevated prices. Figure 3 below illustrates wheat production trends based on official Government of Ethiopia statistics.

Figure 3: Wheat Cultivated Area and Production in Ethiopia



Source: Ethiopian Statistical Service (ESS) and Ministry of Agriculture (MOA)

Consumption

Post forecasts MY 2025/26 wheat consumption to reach 7.82 million MT, representing a 3% increase from the estimated 2024/25 levels. This growth is largely attributed to Ethiopia's increasing urbanization (4.8% annually), rapid population expansion (2.7% annually), and changing dietary preferences that favor processed wheat products like bread, pasta, biscuits, and pastries—especially in urban areas.

Wheat is the third most consumed grain in Ethiopia, after teff and corn. While per capita wheat consumption had been rising in previous years, recent data shows a slight decline. Annual per capita consumption is projected to fall to 51 kg in 2025, down from 53 kg in 2020. Post estimated that, between 2020 and 2024, the average annual per capita consumption hovered around 53 kg, declining by roughly 1% each year. This decrease may be associated with rising prices of wheat products, reduction of humanitarian wheat distributions, and a shift toward more affordable grains, particularly among rural and low-income households. This national trend does not reflect the growing consumption demand in larger urban areas like Addis Ababa, where consumption of wheat-based products such as bread and pasta continues to increase.

Ethiopia's wheat milling industry plays a pivotal role in the national wheat value chain; influencing demand for both locally produced and imported wheat grain and flour. An estimated 500 flourmills operate across the country, with concentrations in urban and peri-urban centers such as Addis Ababa, Adama, Hawassa, Debre Markos, Bahir Dar, and Mekelle. These mills range from small-scale facilities to large industrial plants. Reports indicate that approximately 30% of the mills are concentrated in and around Addis Ababa. Several other large-scale mills are also located in Oromia region. The milling industry has a combined installed capacity ranging between four to five million metric tons annually. Actual utilization frequently falls below 50%, and sometimes as low as 20%, due to rising input costs, inconsistent supply, taxation issues, and limited access to working capital. These constraints are affecting millers, with some of them shutting down their operations and shifting to other lines of business.

With growing demand, millers increasingly rely on commercially imported wheat—primarily hard or durum varieties. These millers generally prefer durum wheat due to its high protein content and strong gluten, which enhance bread and pasta quality. While most wheat imports are hard wheat varieties, imported wheat flour tends to have weaker gluten strength. As a result, bakeries often blend it with local flour to improve baking quality.

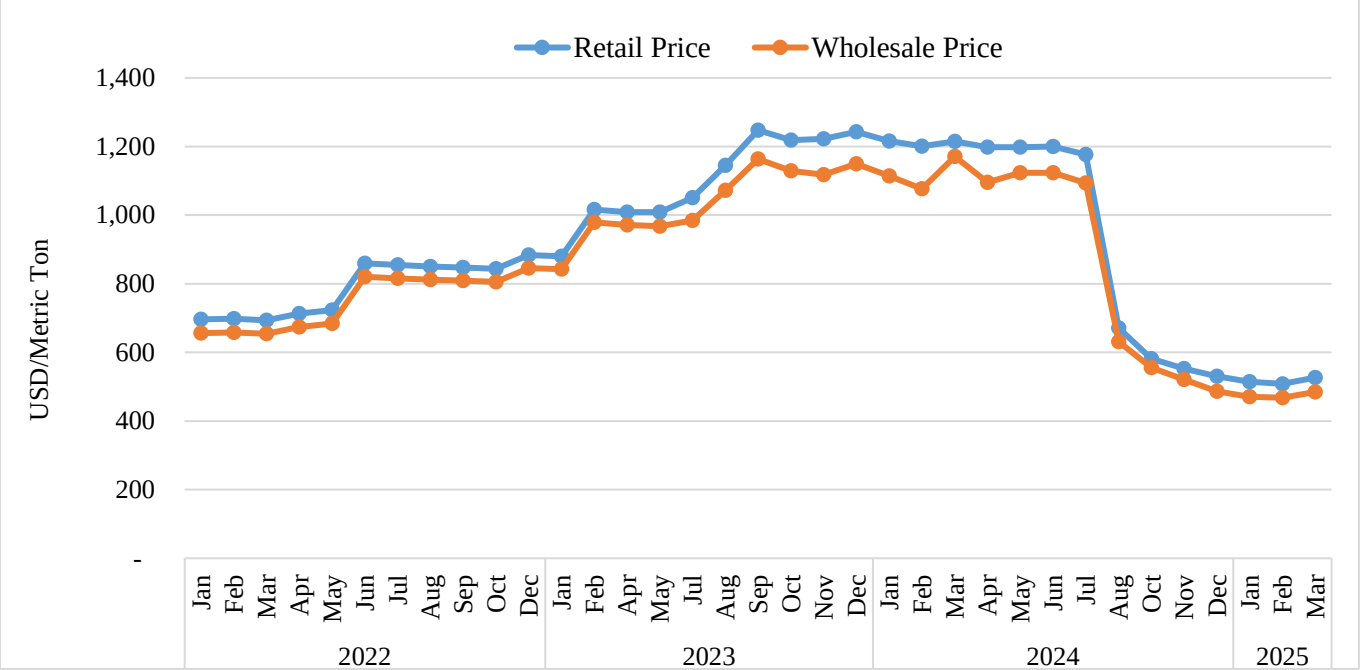
In parallel, food aid programs utilize both imported and locally sourced wheat grain and flour to support millions of food-insecure people affected by conflict, drought, and other crises. Shifting priorities among development partners are expected to reduce the volume of wheat entering the country for humanitarian relief purposes.

Prices

Between January and March 2025, both retail and wholesale wheat prices saw a slight increase, with retail prices rising from $514/MT to $527/MT, while wholesale prices went up from $471/MT to $484/MT, indicating an upward trend in both markets but with the retail price consistently higher than

wholesale prices. Figure 4 below shows the monthly average retail and wholesale prices of wheat grain from 2022 to 2025.

Figure 4: Monthly Average Retail and Wholesale Wheat Grain Prices



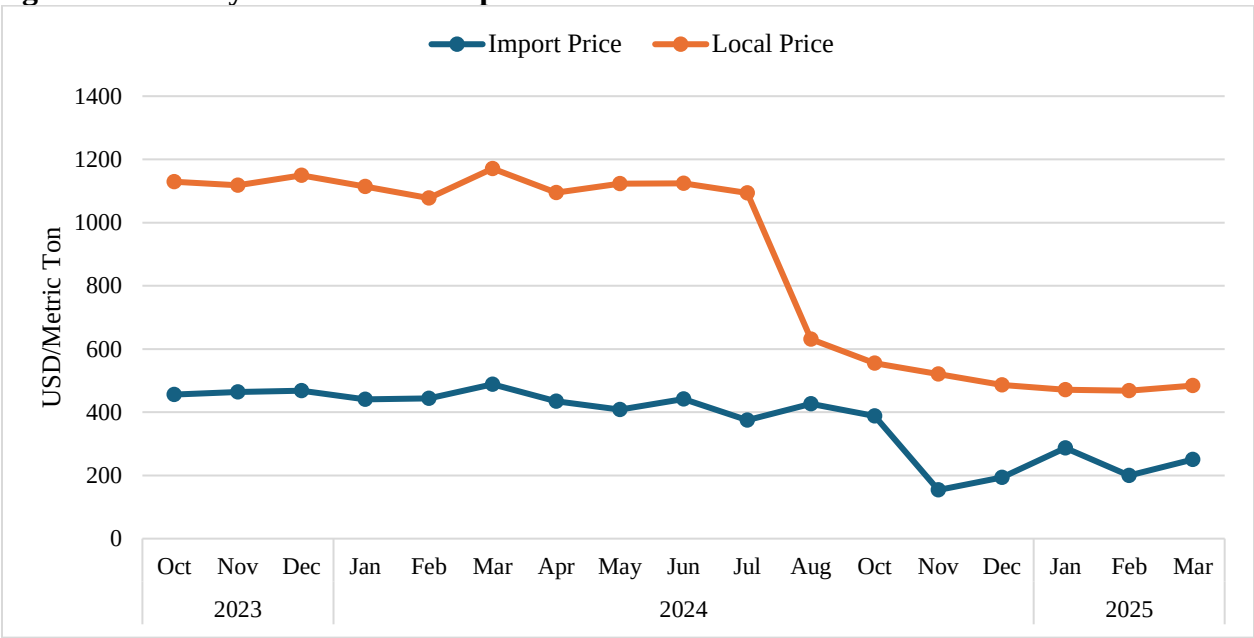
Source: National Market Information System (NMIS)

Note: Post used Adama city as the reference market for grain prices in this report due to its proximity to Addis Ababa and its significance as a key regional grain market.

Ethiopia has experienced significant increases in grain prices, including wheat, driven by currency devaluation, supply chain disruptions, and rising input costs. These pressures intensified after the exchange rate system shifted from a fixed exchange rate to a market-based foreign exchange system in late July 2024. Between July 2024 and March 2025, the birr depreciated by approximately 120%, leading to sharp increases in the prices of wheat and wheat-based products.

With the rising domestic prices, imported wheat grain and flour have remained relatively more affordable than locally produced alternatives, offering a strong price advantage in the Ethiopian market. In January 2025, imported wheat flour was approximately $60 to $75 per metric ton cheaper than locally produced flour. This significant price difference encouraged private traders to import wheat flour and resell it locally at better profit margins. The gap has recently narrowed following the introduction of a 25% tariff on imported wheat flour and a 15% tariff on other grain flours. The Government of Ethiopia has ended the franco-valuta import scheme, which previously allowed duty free imports of wheat grain and flour. (See policy section for details.) Figure 5 below presents a comparison of local and imported wheat prices.

Figure 5: Monthly Wheat Grain Import Prices vs Local Prices: 2023-2025



Source: Trade Data Monitor (TDM) and NMIS

The above chart shows Ethiopia's wheat grain prices reflected a consistent trend where local prices remained significantly higher than import prices. Even before the August 2024 currency devaluation, local wheat averaged over $1,100/MT, while import prices stayed below $490/MT. By early 2025, import prices ranged between $287-250/MT, while local prices remained consistently above at $471–484/MT, maintaining a notable price disparity in favor of imports.

Trade

Post forecasts that Ethiopia’s wheat and wheat product imports could decline by 24 percent to 1.3 million MT in MY 2025/26. Domestic wheat production is expected to see a modest increase due to improved yields and expanded irrigated farmland. While overall demand for wheat in Ethiopia is projected to remain strong, import volumes are likely to decrease gradually as local supply improves.

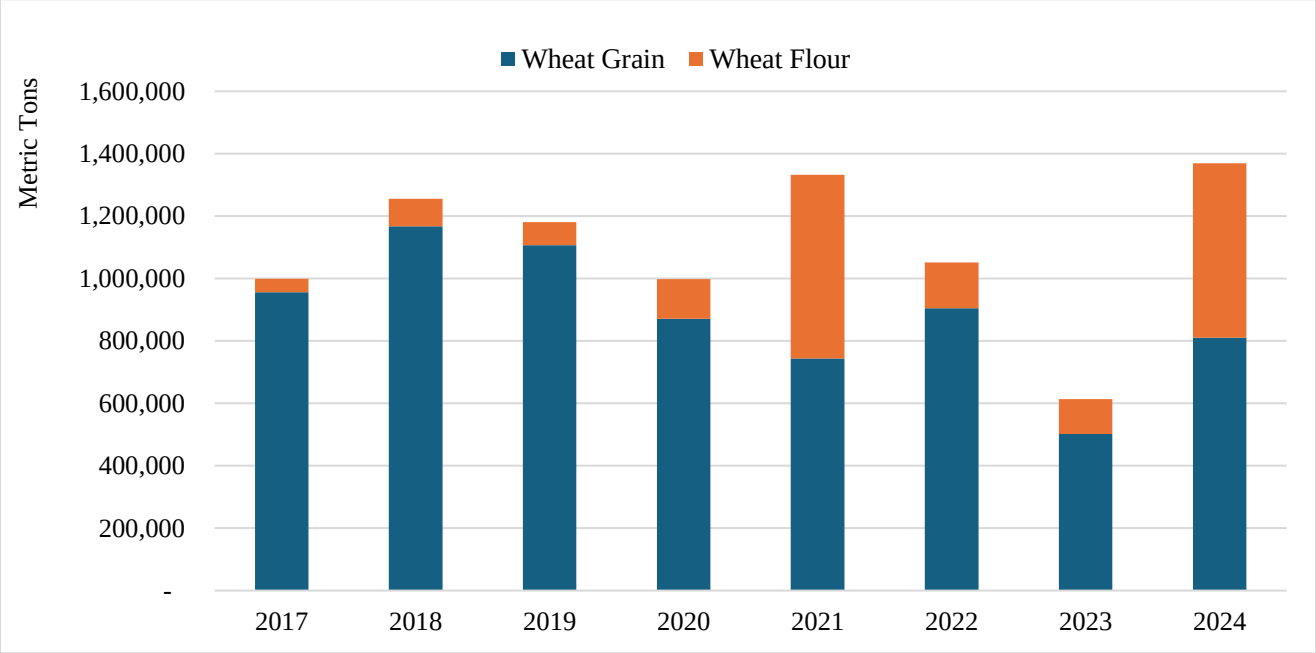
Post does not expect wheat exports in MY 2025/26 due to rising domestic demand and uncompetitive pricing. Ethiopia maintains no official wheat export records.

In MY 2023/24, Ethiopia’s total wheat grain equivalent imports reached approximately 1.7 million MT–an increase of nearly 80% compared to the previous year’s import figure. This amount also significantly exceeds the five-year average of 1.4 million MT.

Wheat grain imports alone rose from 502,000 MT in MY 2022/23 to 810,000 MT in 2023/24, while wheat flour import volume (in grain equivalent) saw a dramatic increase from 111,000 MT to 560,000 MT. Turkey (86%), Egypt (9%), and Russia (2%) were the primary suppliers of wheat flour to Ethiopia during this period.

Wheat flour imports have seen fluctuations over time and imports face several challenges. Imports in MY 2023/24 surged, approaching levels seen in 2021. This rebound was influenced by a recovery in commercial imports alongside sustained humanitarian demand. Private importers capitalized on lower international prices to bridge domestic supply gaps, as local wheat and flour prices rose. Additionally, traders had been importing duty free under the Franco-Valuta scheme, selling the wheat flour locally at better profit margins. The most recent data shows wheat flour imports from October 2024 to March 2025 dropped by 82% year-on-year. Contributing factors likely include the 25% import tariff, foreign exchange shortages, uncertainty due to local currency depreciation, and limited working capital among traders, millers, and food manufacturers. Given these challenges, Post anticipates that imports of commercial wheat flour will be significantly reduced.

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



Source: TDM

In MY 2023/24 (Oct–Sep), Ethiopia imported approximately 810,000 MT of wheat grain, valued at $344 million. Russia dominated the market, supplying over 80% of total imports, followed by Romania (10.4%) and Kenya (3.3%), with the remaining volumes sourced from a mix of countries including Ukraine. Table 2 below presents imports of wheat grain by a partner country.

Table 2: Ethiopia's Import of Wheat Grain in MY 2023/24

Partner Country	Volume: MT	Value: Millions USD	Market Share in Volume (%)
Russia	650,955	272.70	80.3
Romania	84,275	37.54	10.4
Kenya	26,955	11.89	3.3
Ukraine	21,949	8.84	2.7
India	8,296	3.59	1.0
Tanzania	6,035	3.23	0.7
Australia	5,000	2.18	0.6
Turkey	2,611	2.04	0.3
China	1,710	1.13	0.2
Moldova	1,454	0.64	0.2
Egypt	1,000	0.43	0.1
Total	**810,240**	**344.22**	**100.0**

Source: TDM

Ethiopia's wheat import patterns reveal an ongoing reliance on foreign supplies, even as the country pursues self-sufficiency goals. The government, which was the primary wheat buyer for its subsidized bread program, removed the subsidies and stopped international wheat purchases in 2023. Private sector imports continued in order to compensate for domestic production shortfalls.

Policy

Import Substitution: Ethiopia's import substitution policy aims to reduce reliance on foreign wheat by boosting domestic production through expanded irrigation and improved agricultural practices. These efforts have increased local output. The government acknowledges that humanitarian agencies may continue wheat imports needed for humanitarian purposes.

Franco-Valuta Import Scheme: Between 2019 and 2024, the Ethiopian government permitted private importers to bring essential food commodities—such as wheat grain and flour—into the country duty-free under the Franco Valuta scheme. This policy allowed importers to utilize their own foreign currency reserves without needing central bank approval, helping to stabilize domestic markets and curb food price inflation. In November 2024, the government discontinued the Franco Valuta system, mandating that all imports now require authorization from the National Bank of Ethiopia.

Mandatory Fortification: In August 2024, Ethiopia introduced a mandatory wheat flour fortification policy under its National Food Fortification Program, requiring all wheat flour—whether locally milled or imported—to be fortified with key vitamins and minerals. The measure seeks to combat widespread micronutrient deficiencies and boost national health outcomes. Uniform fortification standards may raise production costs, particularly for imported flour.

Tariffs: The tariff on wheat grain consists of a 5% import duty, a 15% Value Added Tax (VAT), and a 3% withholding tax. To safeguard the domestic milling industry, a 25% tariff is imposed on imported wheat flour. The table below outlines Ethiopia's current tariff structure for both wheat grain and wheat flour.

Table 3: Ethiopia's Tariff Structure for Wheat Grain and Wheat Flour (In percentage)

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

Table 4: Wheat Production, Supply, and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1900	1900	1900	1910	0	1950
Beginning Stocks (1000 MT)	803	837	1203	1057	0	1357
Production (1000 MT)	5800	5900	6000	6200	0	6500
MY Imports (1000 MT)	1700	1700	1300	1700	0	1300
TY Imports (1000 MT)	1525	1525	1300	1550	0	1200
TY Imp. from U.S. (1000 MT)	0	0	0	15	0	40
Total Supply (1000 MT)	8303	8437	8503	8957	0	9157
MY Exports (1000 MT)	0	0	150	0	0	0
TY Exports (1000 MT)	0	0	150	0	0	0
Feed and Residual (1000 MT)	300	380	300	400	0	420
FSI Consumption (1000 MT)	6800	7000	6900	7200	0	7400
Total Consumption (1000 MT)	7100	7380	7200	7600	0	7820
Ending Stocks (1000 MT)	1203	1057	1153	1357	0	1337
Total Distribution (1000 MT)	8303	8437	8503	8957	0	9157
Yield (MT/HA)	3.0526	3.1053	3.1579	3.2461	0	3.3333
(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						

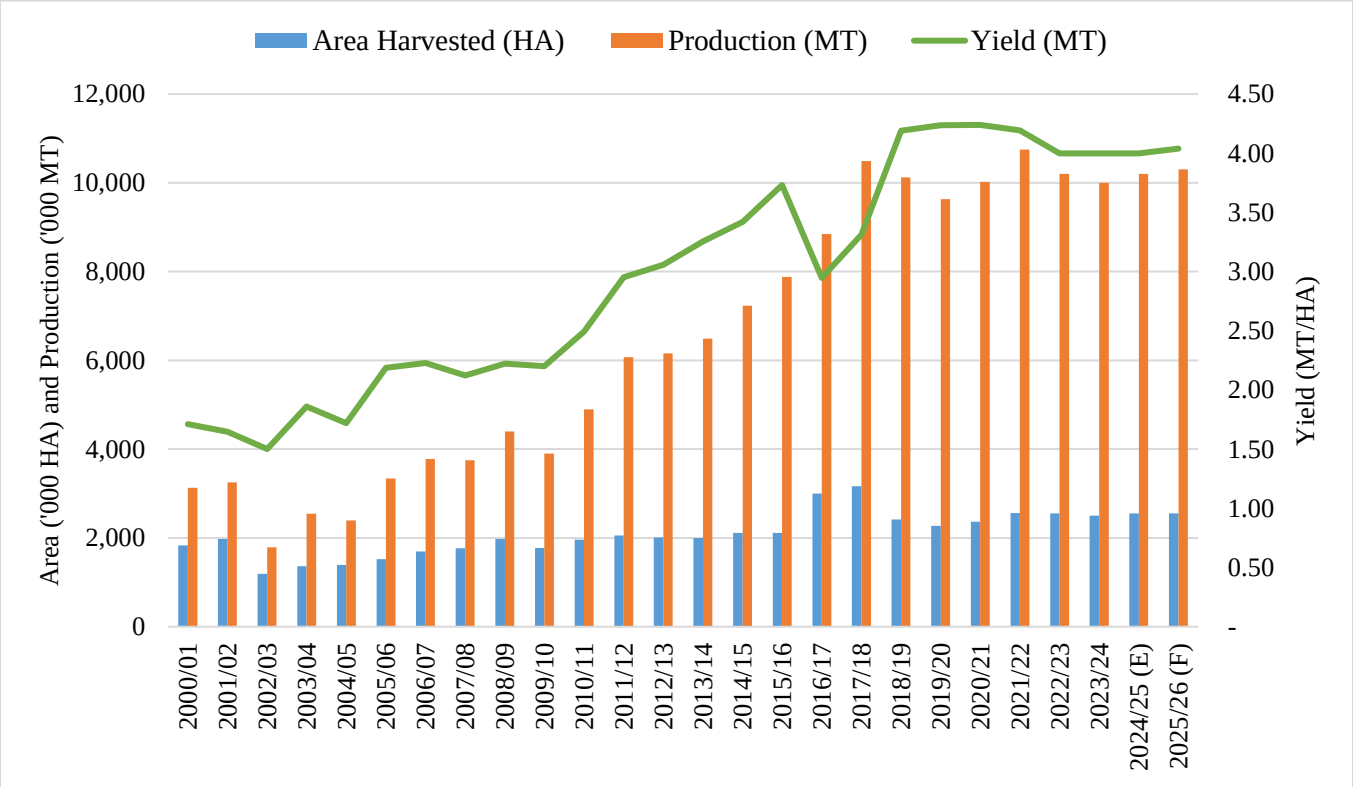
CORN

Production

Post forecasts MY 2025/26 corn production at 10.3 million MT, up slightly by one percent from the MY 2024/25 estimate of 10.2 million MT. Harvested area remains unchanged from previous years Corn cultivation in Ethiopia has remained relatively stable in terms of area—standing at 2.5 million hectares. Yields have gradually improved due to the adoption of improved hybrid seed varieties, better agronomic practices such as row planting, and increased extension support.

During the 2024/25 main cropping season, favorable weather and vegetation conditions generally supported positive production prospects. However, some production shortfalls occurred, resulting from flooding in southwestern agro-pastoral zones and disruptions caused by conflict in parts of the Amhara Region.

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



Source: USDA and Post Estimate

Looking ahead, corn production is expected to increase significantly with Ethiopia's recent approval of genetically engineered (GE) corn varieties, which offer up to 60 percent higher yield potential compared to conventional maize hybrids. In addition, farmers in major corn-growing regions are increasingly adopting high-yielding hybrid maize varieties, drawn by their superior productivity and higher market returns. These hybrids offer improved resilience to pests and drought but also command more favorable prices in local markets, further encouraging their widespread adoption among maize producers.

Persistent conflict in key corn-producing regions such as Oromia and Amhara are expected to limit productivity improvements. Post foresees that the instable security situation, particularly across the corn-growing regions, will potentially impact the upcoming main harvest season. This disruption in timely transport and distribution of fertilizer and seeds, farm management, labor mobility, and market access, threatens to offset potential production gains.

Consumption

Corn consumption is projected to reach 10.35 million MT in MY 2025/26, showing a modest increase over the revised estimate for MY 2024/25. This steady growth is boosted by rising demand for both food and livestock feed.

Corn is the most consumed grain crop in Ethiopia, playing a central role in the national diet and in food security. From the total corn consumption, roughly 80 to 85 percent is utilized for human consumption, reflecting its staple status and its integration into a variety of traditional dishes such as *injera, kitta*, bread, porridge, etc. A significant volume of fresh corn is also consumed in roasted and boiled grain form. The remaining 15 to 20 percent serves as input for animal feed, seed stock, and limited industrial processing. With the expansion of agro-processing industries, corn-based flour and snacks are also increasingly emerging, especially among urban consumers. Corn has gained increasing significance in recent years due to its expanding role as a key input for poultry and dairy feed.

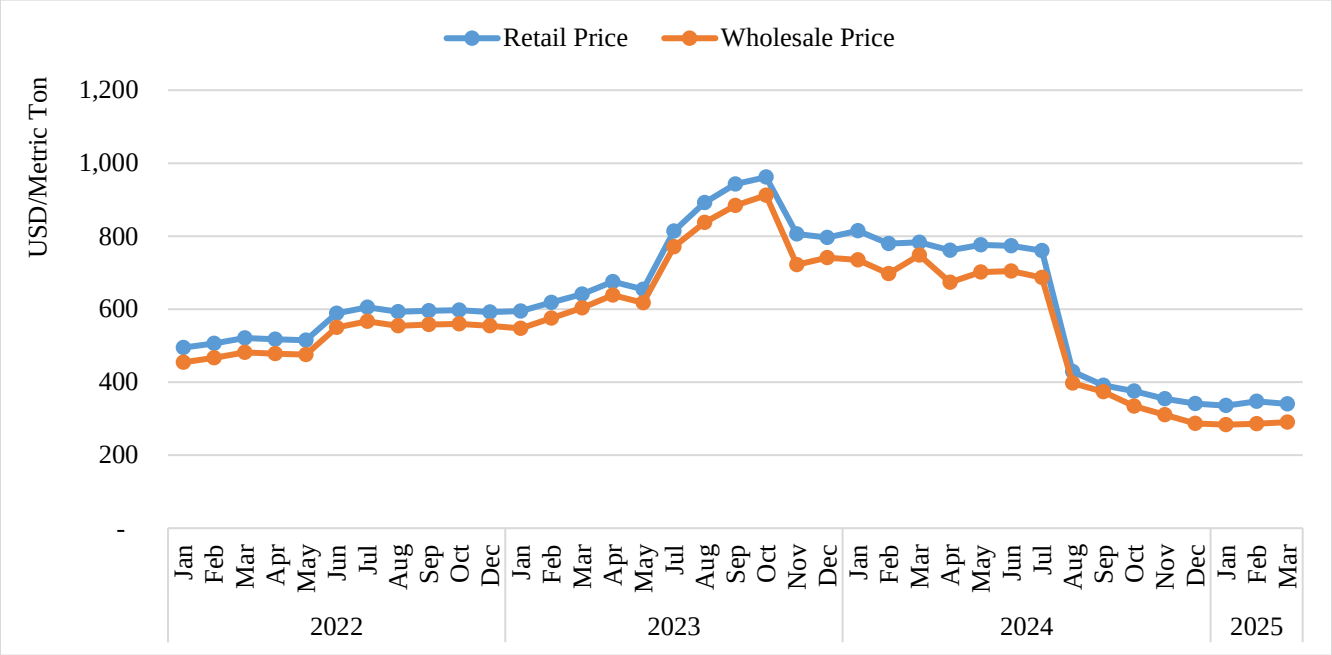
On a per capita basis, corn consumption is estimated at 73 kg annually, making it the leading grain in individual dietary intake. This high consumption rate is supported by corn's relative affordability, widespread cultivation across agro-ecological zones, and cultural acceptance as a versatile food grain.

Corn consumption in Ethiopia is projected to grow steadily. This growth is underpinned by continued urbanization trends, population expansion, and expanding food and feed processing sectors. Feed utilization is expected to grow due to rising demand from the livestock and poultry sectors, where corn is increasingly used as a feed grain. Additionally, the introduction of improved maize varieties including GE hybrids and greater adoption of productivity-enhancing practices could enhance domestic supply and reinforce consumption trends. Recurring climate shocks, post-harvest losses, and supply chain bottlenecks pose ongoing challenges.

Prices

Between January and March 2025, corn prices in Ethiopia stabilized following sharp declines in late 2024. Retail prices ranged from $336 to $348/MT, while wholesale prices hovered between $284 and $290/MT—down from over $700/MT earlier in 2024. The decline in price reflects improved domestic supply and the depreciation of the Birr against the U.S. dollar.

Figure 8: Monthly Average Retail and Wholesale White Corn Prices (2022-2025)



Source: NMIS

Trade

Post maintains corn export projections for both MY 2024/25 and 2025/26 at zero, as nearly all the domestic production is consumed locally. Although small volumes of informal cross-border trade occur, it remains unquantified. Currently, Ethiopia does not import corn grain.

Table 5: Ethiopia's Tariff Structure for Corn (In percentage)

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

Policy

The Ethiopian government maintains export restrictions on key staple crops including teff, corn, and sorghum to stabilize domestic grain prices as part of its food security strategy. These export restrictions often lack transparent communication to affected producers and traders. The restrictions are sometimes lifted ad hoc without official public announcements. Industry contacts indicated that as corn remains on the list of temporarily banned export grains. However, during periods of confirmed surplus harvests, authorities may grant special export permits on a case-by-case basis.

Table 6: Corn Production, Supply, and Distribution

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2500	2500	2550	2550	0	2550
Beginning Stocks (1000 MT)	1075	1000	880	850	0	800
Production (1000 MT)	10000	10000	10200	10200	0	10300
MY Imports (1000 MT)	5	0	0	0	0	0
TY Imports (1000 MT)	5	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	11080	11000	11080	11050	0	11100
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)	1200	1200	1250	1250	0	1300
FSI Consumption (1000 MT)	9000	8950	9000	9000	0	9050
Total Consumption (1000 MT)	10200	10150	10250	10250	0	10350
Ending Stocks (1000 MT)	880	850	830	800	0	750
Total Distribution (1000 MT)	11080	11000	11080	11050	0	11100
Yield (MT/HA)	4.0000	4.0000	4.0000	4.0000	0	4.0392

(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

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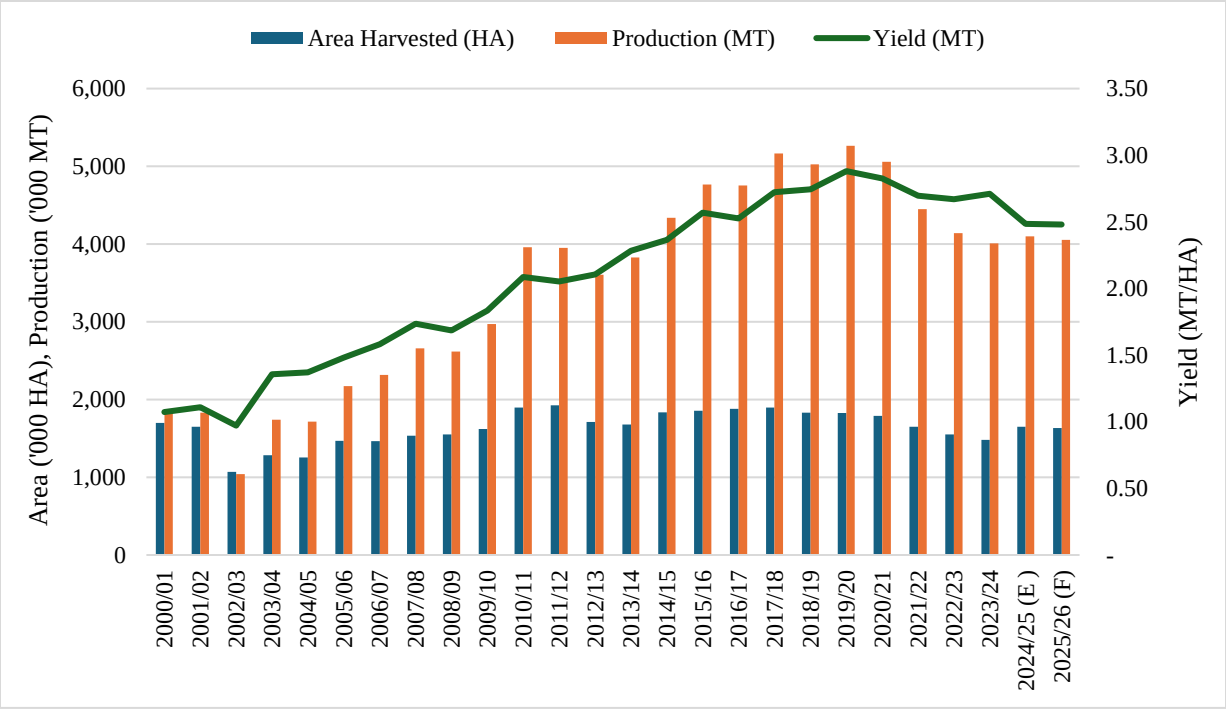
SORGHUM

Production

In MY 2025/26, sorghum production is projected at approximately 4.06 million MT, showing a slight decline from the previous year's estimate of 4.10 million MT. The harvested area is expected to decrease marginally to 1.64 million hectares, largely due to ongoing land competition from higher-value crops such as sesame seed, soybeans, and cotton. Additionally, persistent conflict in major producing regions will continue to limit production.

Sorghum plays an important role in Ethiopia's agricultural sector, ranking as the fourth most produced grain in the country. The leading sorghum-producing regions remain Oromia, Amhara, and Tigray. According to official GOE figures, sorghum occupies approximately 11% of the total cultivated land and contributes around 10% to national grain production, supporting the livelihoods of an estimated 4.3 million farmers. Despite its significance, sorghum production has faced setbacks in recent years, disrupted by declining yields and shrinking harvested areas. This is largely due to limited access to improved seed varieties, recurring drought conditions, pests, and ongoing conflict in key growing regions. Research shows that Striga weed infestation is one of the key challenges limiting sorghum production in Ethiopia, leading to yield losses that often exceed 30%.

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



Source: USDA and Post Estimate

Consumption

Sorghum consumption in MY 2025/26 is forecast at 4.30 million MT, a decline from the previous year due to reduced production and rising domestic prices.

Sorghum is a staple crop in Ethiopia, widely utilized for food, feed, and traditional beverages. It plays a critical role in food security, especially in drought-prone regions due to its resilience. Per capita consumption of sorghum is estimated at around 36 kg annually. Consumption remains high in rural areas, particularly in regions like Amhara, Oromia, and Tigray. Sorghum is primarily consumed in the form of injera, porridge, and *nifro* (in boiled grain form). It is also widely used to make local alcoholic beverages such as t*ella* and *arek*e.

Recently, sorghum has increasingly been mixed with teff flour to make injera as a more affordable alternative, driven by high teff prices and limited supply. Sorghum serves as a substitute for teff, particularly since teff is the most expensive among staple grains and often unaffordable for many households. Beyond its role in food, sorghum is also gaining importance in livestock feed and small-scale industrial processing, including the production of flour, snacks, and baby food. Its utilization in animal feed is also growing, with strong potential to help meet the rising demand for poultry feed across the country.

Trade

Post forecasts that sorghum imports in MY 2025/26 will total 200,000 MT, marking a 23% decline from the previous year. This decrease reflects fluctuations in sorghum use for food aid programs, which have accounted for approximately 80% of total sorghum imports over the past five years, with the remainder imported commercially by private traders. The United States continues to be the primary source of grain sorghum for Ethiopia's food aid. Given current export restrictions on staple grains and strong domestic demand, Post does not expect any formal grain sorghum exports in the coming year.

Table 7: Ethiopia's Tariff Structure for Sorghum (In percentage)

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 8: Sorghum Production, Supply, and Distribution

Sorghum	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1480	1480	1650	1650	0	1635
Beginning Stocks (1000 MT)	96	171	66	75	0	90
Production (1000 MT)	4010	4140	4100	4100	0	4055
MY Imports (1000 MT)	10	14	200	260	0	200
TY Imports (1000 MT)	10	14	200	260	0	200
TY Imp. from U.S. (1000 MT)	0	0	0	230	0	160
Total Supply (1000 MT)	4116	4325	4366	4435	0	4345
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	50	50	65	0	50
FSI Consumption (1000 MT)	4000	4200	4250	4280	0	4250
Total Consumption (1000 MT)	4050	4250	4300	4345	0	4300
Ending Stocks (1000 MT)	66	75	66	90	0	45
Total Distribution (1000 MT)	4116	4325	4366	4435	0	4345
Yield (MT/HA)	2.7095	2.7973	2.4848	2.4848	0	2.4801

(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

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BARLEY

Production

Total barley production in Ethiopia in MY 2025/26 is projected to increase to 2.38 million MT, representing a 3.5 percent rise compared to the estimated production in MY 2024/25. This anticipated growth is stimulated by improved farm gate prices, which are expected to remain favorable despite rising input costs and some shifts toward more profitable crops like wheat. Official statistics in Ethiopia do not separately report the production of food barley and malt barley.

Barley remains a critical crop in Ethiopia's agricultural landscape, serving as a staple food, animal feed, and increasingly as a high-value cash crop. Historically concentrated in the southeastern highlands, barley production has steadily expanded into the central, northwestern, and northern highlands over recent years. This shift is largely attributed to increased investments by multinational brewing and malting companies, which have improved access to certified seed, extension services, and stable markets. Looking forward, the expansion of Ethiopia's malting and brewing industry is expected to play a pivotal role in sustaining and further boosting barley production.

Consumption

Barley consumption in MY 2025/26 is projected at 2.47 million MT, a 2% increase from the previous year. This growth is propelled by rising demand for food, malt production, and animal feed. Barley is a staple in Ethiopia, especially in highland regions, and is widely consumed as porridge, injera, roasted snacks (*kollo*), and traditional drinks like *tella*.

Recent studies indicate that barley utilization is increasingly influenced by Ethiopia's expanding malting and brewing industry, which accounts for about 45% of total malt barley demand. Of the remainder, 23% is used by the commercial food and beverage sector, 27% is consumed by households, and 5% is reserved for seed. The malting and brewing industry is the largest single consumer of malt barley, backed by a growing beverage sector. Over the past five years, four major malting companies have increased their combined annual capacity from 52,000 to 172,000 MT, with utilization rates exceeding 85%. Industry analysts estimate that current demand stands at 230,000 MT and rises to 265,000 MT when including raw barley used in brewing. Analysts also project a 15% 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.

Trade

Barley imports in MY 2025/26 are projected at 100,000 MT, spurred by increased demand from the malting and brewing industries and reported supply shortages in the domestic market during the current marketing year.

In MY 2023/24, barley imports were less than 1,000 MT, while the five-year average stood at approximately 40,000 MT. In the past, the malting and brewing industry relied heavily on imported malt barley; however, around 95% of current demand is now met through local sourcing.

Table 9: 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 10: Barely Production, Supply, and Distribution

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	980	980	980	960	0	970
Beginning Stocks (1000 MT)	112	112	72	77	0	72
Production (1000 MT)	2450	2450	2485	2300	0	2380
MY Imports (1000 MT)	10	0	50	90	0	100
TY Imports (1000 MT)	10	0	50	90	0	100
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	2572	2562	2607	2467	0	2552
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	35	100	35	0	70
FSI Consumption (1000 MT)	2450	2450	2400	2360	0	2400
Total Consumption (1000 MT)	2500	2485	2500	2395	0	2470
Ending Stocks (1000 MT)	72	77	107	72	0	82
Total Distribution (1000 MT)	2572	2562	2607	2467	0	2552
Yield (MT/HA)	2.5000	2.5000	2.5557	2.3958	0	2.4536

(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

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MILLET

Production

Ethiopia's total millet production for MY 2025/26 is estimated at 1.10 million MT, reflecting a 2.2 percent decrease or 25,000 MT compared to the previous year. This decline is primarily attributed to lower yields caused by limited access to improved seeds and fertilizers, as well as ongoing conflict in key growing regions, particularly Amhara, which contributes to approximately half of the national production.

Millet is a crucial crop in Ethiopia, thriving in mid-to high-altitude areas with moderate rainfall. It is highly valued for its drought tolerance, nutritional content, and storage durability, making it vital for food security in vulnerable regions. However, average yields remain low at 2.47 MT/ha due to challenges such as traditional farming practices, low adoption to improved seed varieties, pest, and disease. While it has received less focus compared to other staple crops, initiatives by research institutions and development programs are expected to improve productivity through advanced agronomic practices and increased farmer support.

Consumption

Millet consumption in MY 2025/26 is forecast at 1.10 million MT, down approximately 3% from the previous year. The decline is attributed to reduced local production, largely due to conflict in major producing regions such as Amhara.

Millet remains a lesser-known grain in Ethiopia's urban food markets but holds significant value in rural communities, particularly in Amhara and lowland areas of Oromia, Tigray, and Southern regions. It is a staple for many households in these regions, commonly used in the preparation of traditional dishes such as porridge, flatbread, and fermented drinks. Its importance is amplified during times of drought or crop failure, as millet thrives in harsh climates and offers strong nutritional benefits. Its overall consumption lags behind more dominant staple grains like teff and sorghum.

Trade

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

Table 11: Millet Production, Supply, and Distribution

Millet	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Ethiopia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	450	450	455	455	0	445
Beginning Stocks (1000 MT)	10	10	10	10	0	5
Production (1000 MT)	1100	1120	1125	1125	0	1100
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1110	1130	1135	1135	0	1105
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)	25	25	30	30	0	25
FSI Consumption (1000 MT)	1075	1095	1100	1100	0	1075
Total Consumption (1000 MT)	1100	1120	1130	1130	0	1100
Ending Stocks (1000 MT)	10	10	5	5	0	5
Total Distribution (1000 MT)	1110	1130	1135	1135	0	1105
Yield (MT/HA)	2.4444	2.4889	2.4725	2.4725	0	2.4719

(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

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Attachments:

No Attachments