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Understanding food systems policies for healthy diets in Ethiopia: Opportunities for urban inclusion

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Report

Understanding food systems policies for healthy diets in Ethiopia



ODI Global



World Vegetable Center

Opportunities for urban inclusion

Paulos Desalegn, Maryam Rezaei, Shahzoda Alikhanova

April 2025



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Acronyms

AGP	Agricultural Growth Program
ATI	Agricultural Transformation Institute
CRGE	Climate-Resilient Green Economy
CSO	civil society organisation
ECCSA	Ethiopian Chamber of Commerce and Sectoral Associations
EFS	Ethiopia Food Systems
FAO	Food and Agriculture Organisation
FNP	Food and Nutrition Policy
GAIN	Global Alliance for Improved Nutrition
GLI	Green Legacy Initiative
KII	key informant interview
MoA	Ministry of Agriculture
MoE	Ministry of Education
MoH	Ministry of Health
MoTRI	Ministry of Trade and Regional Integration
NCD	non-communicable disease
NFIS	National Financial Inclusion Strategy
NGO	non-governmental organisation
NNAFSS	National Nutrition-Sensitive Agri-Food Systems Strategy
NNP	National Nutrition Program
NSAS	Nutrition-Sensitive Agriculture Strategy
SDGs	Sustainable Development Goals
UNFSS	United Nations Food Systems Summit
V4P&P	Veggies for Planet and People
WTO	World Trade Organization

1 Introduction

1.1 Background

The Ethiopian government has implemented various initiatives to address food system challenges, particularly food insecurity, malnutrition, and micronutrient deficiency. It has introduced multi-sectoral national food and nutrition policies and strategies, such as the Food and Nutrition Policy (FNP) (FDRE, 2018) and National Food and Nutrition Strategy (FDRE, 2021a) to achieve the country's development goals. Since 2018, Ethiopia has shifted its conceptualisation of the food system to incorporate measures for improved nutrition across food and agricultural production and consumption. Strategies and programmes in agriculture have become more nutrition-sensitive, indicating a recognition of the triple burden of malnutrition on public health and the strain on public finances. Despite progress in tackling food insecurity and malnutrition, the March 2023 national baseline survey showed the stunting rate at 29%, wasting at 11%, underweight at 22% and overweight at 6%. The findings also indicated significant levels of anaemia and micronutrient deficiencies among children under five years and women of reproductive age (Ministry of Health et al., 2023). Only 8% of households surveyed in Ethiopia had a diverse food basket, meaning they consume all six food groups in a day (Workicho et al., 2023), as recommended in the national food-based dietary guidelines (EPHI, 2022).

Beyond the undeveloped capacity of the country in agriculture production, which is a key factor in shaping food availability, a range of individual, political, environmental, and structural factors determine quality, access, affordability, and food stability for all. These factors cut across multiple activities, sectors and disciplines across food systems and should be considered in developing holistic food security and nutrition policies and actions. Household wealth, individual education level and geographic location are among the contributing factors that determine food basket diversity (Workicho et al., 2023). Vegetables are among the most recommended sources of vitamins and minerals but are generally under-consumed in Ethiopia (Woolfrey et al., 2021). Ethiopia ranks among the five countries in sub-Saharan Africa with the highest prevalence of zero fruit and vegetable consumption among children, affecting 69% of the population (Semagn and Abubakari, 2023). Cereals (including teff, maize and wheat) were the most dominant food group consumed, followed by pulses (such as peas and beans). Unhealthy diets high in ultra-processed food, sugar, salt and saturated fat and lacking fruits and vegetables are the drivers of non-communicable diseases (NCDs) (Global Food Research Program, 2021). In a country with an urban population of 23% in 2023 according to UN estimates, obesity and other forms of malnutrition are increasingly prominent in cities.

Urban settings in Ethiopia exhibit a higher prevalence of people being overweight or obese (23%) compared to rural areas (6%) (Ministry of Health et al., 2023).

For this study, Adama city was selected as the urban case, which aligns with the geographical focus of the Veggies for Planet (V4P&P) project. Furthermore, Adama is a secondary city, characterised by rapid urbanisation and socio-economic diversity, but also stronger policy and development planning at municipality level – often being referred to as model for urban planning in Ethiopia.

In Adama City, 40% of the people who visited a public health facility in 2020 had central obesity observed (Getahun et al., 2023), and one in ten women (12%) are overweight or obese. Addis Ababa and Dire Dawa record the highest prevalence of obesity and being overweight among women. This highlights the need for targeted interventions in urban areas to address nutritional challenges and promote healthier lifestyles (Ministry of Health et al., 2023).

1.1.1 Enabling factors affecting production and consumption of vegetables in Adama City

Vegetable consumption in Ethiopia remains far below the 240 grams per day recommended by the World Health Organization. The average per capita consumption of vegetables and fruits increased from 31kg in 1996 to 45kg in 2011 (Minten et al., 2018), however this growth is not translated into a higher share of household food expenditures.

The share of vegetables and fruits in total food expenditures has remained relatively stagnant – 10.9% in 1996 and 10% in 2011, while cheaper staple food groups including cereals (36%) and root crops, continue to dominate the diet. The data also highlights significant regional disparities, with adults in urban areas allocating a higher percentage (14.8%) of food expenditures to fruits and vegetables compared to rural areas (9.2%) (ibid.), implying that urban populations may have better access or greater purchasing power. Although specific information is not available for Adama, Belew (2015) found significant variation in vegetable consumption across different regions in Ethiopia. The same study indicated that the consumption of vegetables and fruits is positively associated with GDP per capita, suggesting that economic constraints play a major role in dietary choices. Vegetable consumption in cities like Adama is influenced by income levels, food prices and availability, meaning that efforts to promote vegetable-rich diets must address affordability and accessibility challenges.

On the production side, a significant volume of vegetables comes from smallholder rainfed agriculture, leading to seasonal variations in the volume and type of vegetables in the market. Additionally, the consumption of vegetables fluctuates during the fasting seasons of the Ethiopian Orthodox Tewahedo followers, who abstain from eating meat and dairy products and shift to more grain and vegetable-based diets.

The policy environment plays a critical role in shaping incentives that influence consumer, farmer and businesses (Resnick

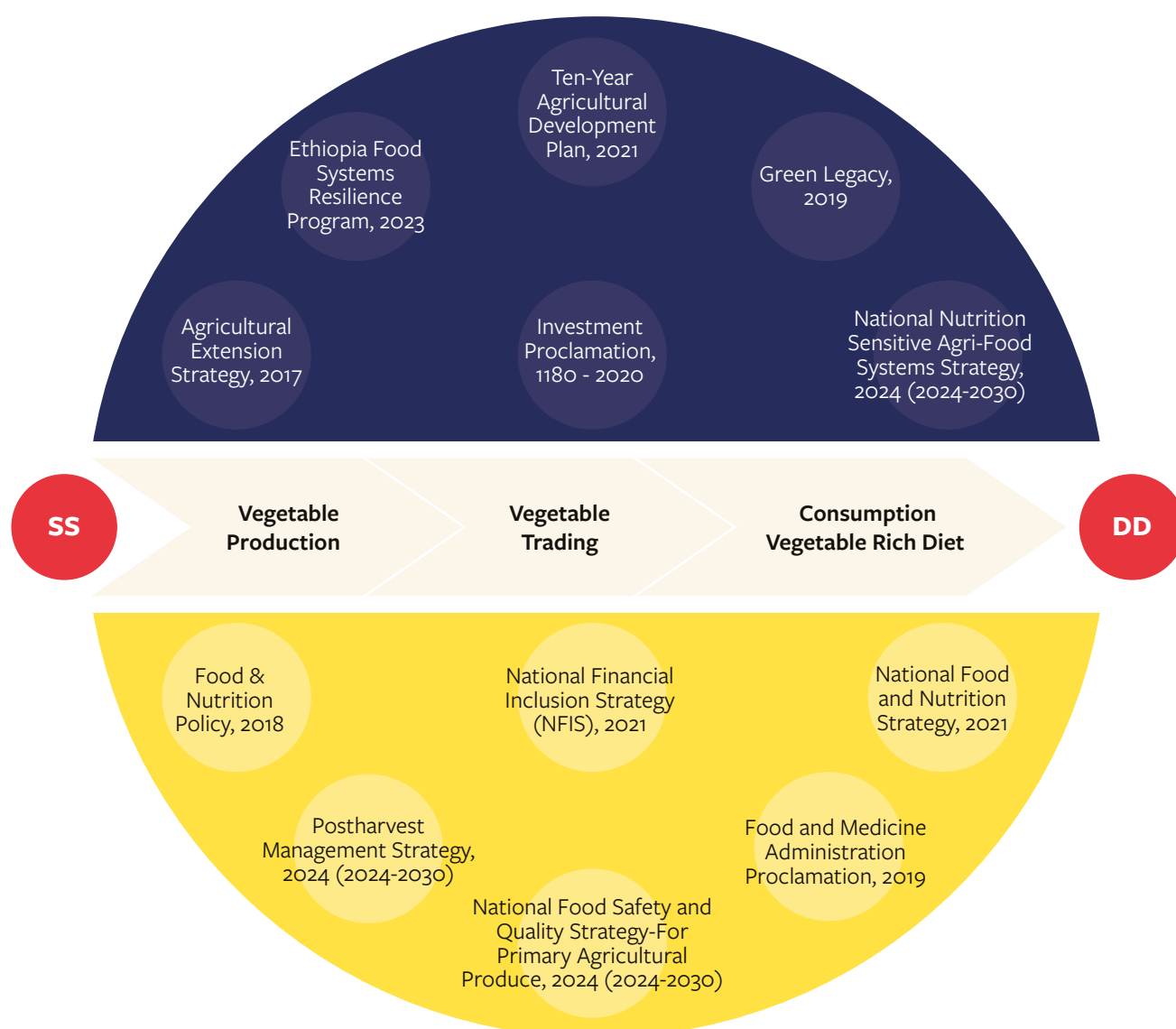
et al., 2015; 2017). To increase the share of vegetables in Ethiopian diets and promote healthier eating habits, policies must take a holistic approach that simultaneously strengthens production and supply (push factors), stimulates demand and consumer activism (pull factors), and establishes supportive legislation and governance mechanisms (policy factors) across multiple systems and levels (von Braun et al., 2023: 948). Policy frameworks influence both the push and pull factors, underscoring the need for integrated and well-coordinated interventions.

Understanding Ethiopia's policy landscape is essential for designing actionable pathways to promote vegetable-rich diets, strengthening agriculture production, enhancing market systems, and driving consumer demand. However, Ethiopia's food system, particularly in urban areas, is shaped by complex and multifaceted policy environments. Agricultural production in rural areas, combined with market dynamics, significantly impacts urban consumption patterns. Beyond structural barriers, decentralisation of governance encounters persistent challenges, including fragmented local governance structures, weak policy implementation capacity at lower administrative levels, financial and human resource constraints, and limited evidence base due to weak integration between academia and local research systems. Additionally, dietary choices are heavily influenced by entrenched cultural preferences and social perceptions, with cereal crops dominating consumption patterns (approximately 70%).

Urban centres in Ethiopia formulate their strategic plans and directives based on federal and regional policies; however, their food system frameworks are largely shaped by supply-side factors rather than proactive, nutrition-sensitive planning. Some cities have initiated school feeding programmes and food distribution centres to enhance access to nutritious foods for vulnerable populations. While these initiatives represent an important step toward improving food security and dietary diversity, a more systematic and policy-driven approach is needed to ensure sustainable and widespread improvements in urban nutrition (ENA, 2023).

As illustrated in Figure 1, food systems policies and regulations play a crucial role in either enabling or constraining vegetable production, marketing, and consumption. Assessing policy processes, implementation effectiveness and their impact on access to affordable healthy diet, particularly those rich in vegetables, can help identifying gaps, governance challenges and opportunities for improvement. A comprehensive evaluation of these factors will not only highlight areas requiring legislative and policy adjustments but also pinpoint strategic entry points for making food systems policies more effective, inclusive and responsive to the goals of reducing poverty and malnutrition.

Figure 1 Food system policies that affect vegetable market system



1.2 Research aim and questions

The study of food systems policy in Ethiopia, aimed to understand the process of developing, implementing, and monitoring policies that affect the provision of adequate nutrition and access to a healthy diet for all. The study specifically investigated policy environments conducive to vegetable production, vegetable marketing, and the consumption of a vegetable-rich diet at national and sub-national (i.e. city) levels.

Although the ultimate objective of the research is to understand the impact of the food systems policy environment on access and affordability of healthy diet in Adama City, it's noteworthy that like many other countries in Africa, the development and implementation of policies on food security and nutrition are led by the national government. Consequently, the participation of municipal and local governments in spearheading policy processes in food systems in Ethiopia is minimal.

The research was guided by three clusters of questions:

1. Food systems policy process and stakeholder mapping:

- Policy process: what are the key steps and actors participating in food policy development, and how do power dynamics influence priorities?
- Governance: how do different actors coordinate and govern the multi-level policy implementation?
- Local government roles: how do local entities like the Oromia region and Adama City administration engage in national food systems policy development?

2. Selected food systems policy document content analysis:

- Overall policy coherence vis-à-vis intended impact on the food system.
- How do the policies stimulate, facilitate and empower the production, marketing and consumption of vegetables?

3. Food systems policy implementation and coordination review on the ground – case of Adama:

- Policy awareness and impact: how do urban actors perceive their engagement with food policies and their effect on the affordability and access to healthy diets in Adama?
- Challenges and barriers: what are the main challenges and barriers to increasing vegetable consumption in Adama?

- Governance and synergies: what does governance look like on the ground in Adama, and how do synergies or conflicts affect policy implementation?

1.3 Research significance

This research deepens understanding of Ethiopia's food systems policies, governance structures and implementation mechanisms, and their effectiveness in enabling access to healthy diet, particularly in terms of fostering a supportive environment for vegetable production, marketing and consumption. Mapping key actors and assessing power dynamics helps break down the factors influencing policy design and the potential role of local governments in shaping urban food environments. The study also identifies institutional barriers, governance challenges and conflicts of interest that limit policy effectiveness.

By developing a Theory of Change and outlining pathways for multi-sectoral collaboration, the research provides a foundation for future policy interventions. These insights help bridge the gap between policy intent and real-world impact, particularly in urban settings like Adama.

Finally, the study offers evidence-based recommendations to strengthen the enabling environment for vegetable-rich diets. The findings provide actionable guidance for policymakers, development practitioners and food system stakeholders in guiding policy reforms, programmatic interventions and investment strategies.

2 Methodology

2.1 Conceptual framework

Understanding national policymaking processes is essential in order to identify opportunities and limitations for fostering change in enabling environment. Effective food policy actions consider the preferences, behaviours and socioeconomic and demographic characteristics of the target population from the outset and respond to their needs and priorities. These actions are implemented as part of a combination of mutually reinforcing initiatives (Hawkes et al., 2015) and designed to leverage the mechanisms that maximise impacts.

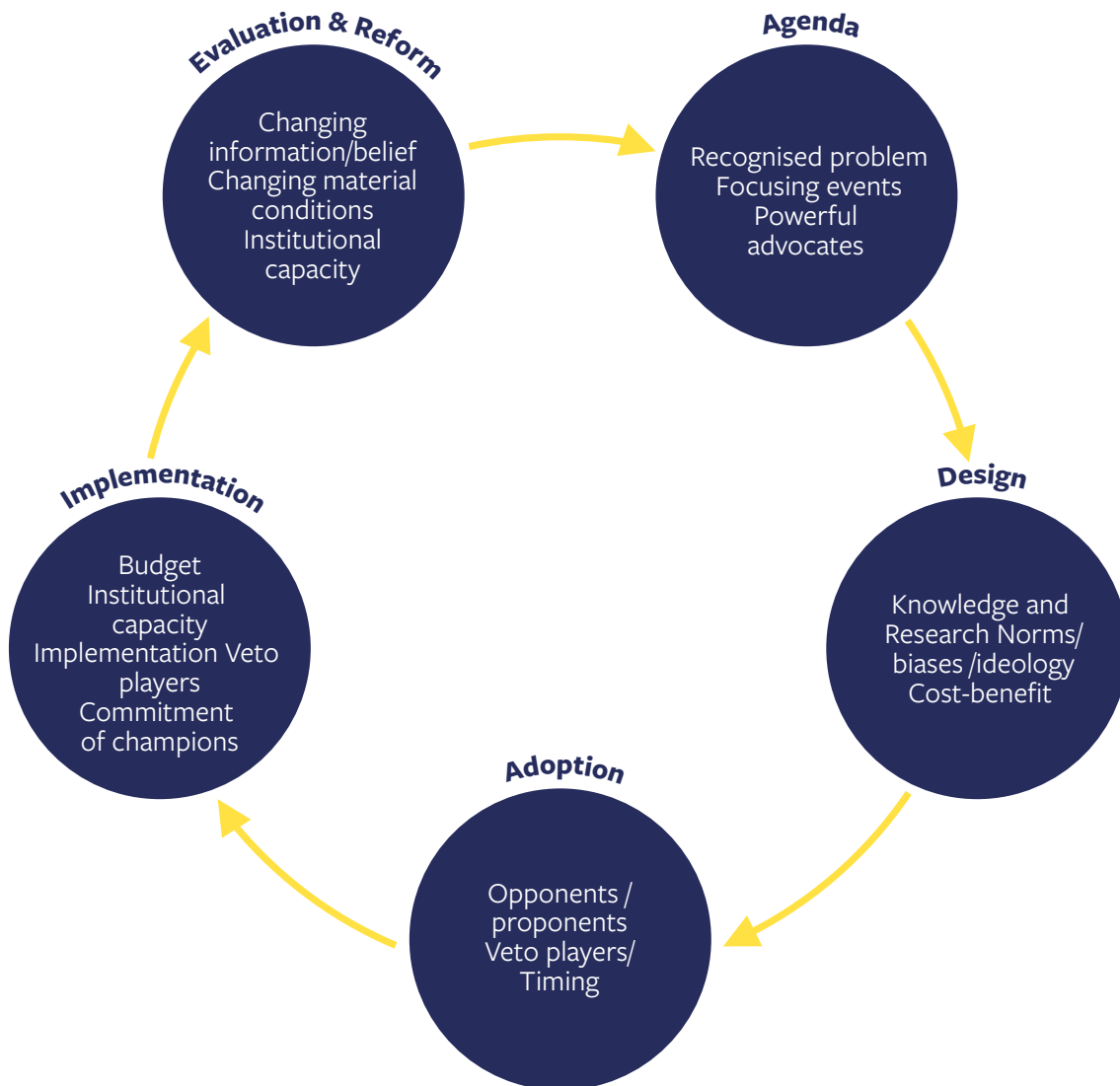
The structure of policy processes significantly influences the quality of the final policy outcomes. After considering various policy analysis methodologies, the Kaleidoscope Model was deemed suitable for the purpose and context of the study. The framework and content of the model are derived from two bodies of knowledge (Resnick et al., 2015; 2017), integrating operational approaches commonly used by governments and donors with insights from scholarly literature: the former yields insights from international experiences through an extensive review of available evidence on policy change in developing countries across a broad range of domains related to food security and nutrition, including agriculture, education, health, nutrition and social protection; the latter draws on the academic literature on policy systems and documents published by public administration. Subsequent primary

field research on input subsidy policies and micronutrient interventions in Ghana, Malawi, South Africa, Tanzania and Zambia helped further refine the model.

The Kaleidoscope Model offers a structured approach to understanding how policies evolve, the forces driving change, and the interplay of actors throughout the policy cycle. The model is flexible enough to capture different elements of the policy process relevant to disparate agricultural and nutrition policy domains in various political, economic and institutional settings (Resnick et al., 2015, 2017). It aims to shed light on the factors influencing policy changes related to food security, particularly in the domains of agriculture and nutrition.

Five key elements of the policy cycle provide the focus:

- Agenda setting: identifying critical events or junctures that bring specific issues to the forefront of policy discussions.
- Policy design: crafting policy solutions and strategies.
- Policy adoption: the formal acceptance of policies by relevant authorities.
- Policy implementation: putting policies into action.
- Evaluation and reform: assessing policy effectiveness and making necessary adjustments.

Figure 2 Adapted Kaleidoscope Model

Importantly, the model emphasises the role of powerful advocacy coalitions in driving policy action. These coalitions consist of various stakeholders (e.g., interest groups, policymakers, private sector, civil society), who influence policy decisions. Their interactions shape policy agendas, design and implementation.

With respect to variable influence, the model recognises different variables at work at various stages of the policy

process. For instance, during agenda setting, political dynamics and public opinion may be crucial, while technical feasibility becomes more relevant during policy design.

For this study, the research team selected and adapted relevant variables and dimensions from the model to align with the research aims and questions. These adjustments were made based on the study's scope and objectives and

insights drawn from previous similar studies, as well as the team's expertise. The team focused on the three elements of the Kaleidoscope Model: (1) agenda setting, (2) policy design, and (3) policy implementation. Adoption, evaluation and reform of policy are not explored in detail, as conducting such a study would require extensive data collection and in-depth case analysis beyond the scope of this research.

While assessing the policy case studies to identify key actors and issues in the vegetable sector – spanning production (availability, quality and price) and consumption (accessibility, integration in diet) – the study consulted the vegetable value chain analysis conducted by the V4P&P project and other relevant studies to ensure alignment with the proposed policy actions.

2.2 Research approach



















The study followed a participatory approach in collecting qualitative data and information from the key informants and focus groups at national level and in Adama City. This approach was complemented by an in-depth review of relevant peer-reviewed and grey literature. Preliminary findings were discussed with key stakeholders in a national consultation workshop to fill the data gaps and triangulate the collected information.

During the initial document review phase, the research team conducted a rapid appraisal of 26 recently drafted and/or implemented food policies across multiple interrelated sectors in Ethiopia, and their design and implementation process.

Using a structured selection process, the team applied a predefined set of criteria within an Excel matrix to evaluate each policy. Three policy cases were initially selected, with a fourth case added during the inception meeting based on stakeholder recommendations to capture additional insights on multi-sectoral policy integration. Based on the scoring system (see Annex 1 for details), the following policies were chosen for detailed analysis:

- Segment 1 (Food and Nutrition – Consumption and Social Protection): Food and Nutrition Policy of Ethiopia (FNP)
- Segment 2 (Agricultural and Food Production): National Nutrition-Sensitive Agri-Food System Strategy (NNAFSS)
- Segment 3 (Trading, Investment and Finance): Ethiopian Trade Policy.
- Additional multi-sectoral case: Ethiopia Food Systems (EFS) transformation vision (included upon stakeholder recommendation for insights into multi-sectoral policy integration). The detailed ranking summary is provided in Annex 2.

Table 1 Selected cases per segment, score, and selection rational

Policy document	Segment	Active or not	Total score	Ranking summary	Selection rational
National Food and Nutrition Strategy, 2021				Top candidate for Segment 1	
Food and Nutrition Policy of Ethiopia, 2018				Second candidate for Segment 1	Case selected as an example of integrated approach to FSN (Food Security and Nutrition) policy
EFS Transformation Vision 2030					Case selected as example of multi-sectoral food systems policy process
Ten-Year Agricultural Development Plan				Top candidate for Segment 2	
National Nutrition Sensitive Agri-Food Systems Strategy (2024 – 2030)				Second candidate for Segment 2	Case selected as a food system policy with nutrition at its core
Ethiopian Trade Policy, 2023 (draft)				Top candidate for Segment 3	Case selected to showcase policy coherence

2.2.1 Data collection and synthesis tools

In line with the Kaleidoscope Model framework, the primary tools used included:

- 1. Selected food systems policy chronology (four main food policy cases):** the chronology provides a starting point for identifying major policy decisions, key individuals and interest groups, level of decentralisation (i.e. whether city authorities were involved), information, and events that shape food systems policies.

Additionally, reconstructing policy events, debates and outcomes helps distinguish highly influential players from less influential and marginal actors. Understanding the timing of key decisions and influencing factors often aids in contributing effectively to ongoing policy discussions. Constructing a policy chronology requires a careful review of available policy documents, government, donor or academic studies related to specific food-system policies. Beyond document review, the research team conducted in-depth interviews with key participants and observers of the policy system.

2. **Stakeholder mapping:** to understand a policy system, the second major diagnostic step involves identifying and mapping the key stakeholders. The team used the following three tools for the study:
- a. stakeholder inventory – lists the institution, role, resources, influence and policy stance for each policy case
 - b. policy system schematic – describes functionally how these key players interact in setting policy agendas, designing policy options, decision-making, implementation and monitoring
 - c. circle of influence – maps the positions and relative power of key policy stakeholders.

2.2.2 Steps and process

The research followed a structured approach, beginning with a systematic inventory of food systems policy documents. A matrix was developed to categorise and evaluate these documents based on predefined criteria, including comprehensiveness, stakeholder engagement, policy coherence, and alignment with the vegetable sector.

Three case studies were initially selected from the policy inventory. During an inception meeting with key stakeholders, a fourth case was added to capture additional insights into multi-sectoral policy coordination. Stakeholders also provided feedback on the selection, ensuring the cases were relevant and impactful in shaping Ethiopia's food system.

A detailed policy review was conducted to trace the evolution of policy decisions,

identify key actors and interest groups, and analyse policy coherence and gaps and contradictions between different frameworks. This historical analysis laid the groundwork for understanding the broader food system governance landscape.

To analyse policy influence dynamics, a multi-dimensional stakeholder mapping process was employed. Each policy case was examined to map key actors and their roles, while a functional framework was developed to illustrate interactions across the policy cycle – covering agenda setting, decision-making, implementation, and monitoring. The research also assessed the positions and relative power of stakeholders, identifying major decision-makers and gatekeepers in Ethiopia's food policy system.

Key informant interviews (KIIs) were conducted in parallel with the document review, engaging policymakers, government officials, private sector representatives, development partners and civil society actors. This iterative process allowed for cross-validation of findings, identification of emerging themes, conflicts of interest, and governance challenges.

Finally, findings from document analysis, stakeholder mapping and KIIs were synthesised to assess the effectiveness of national and local government coordination. The results informed actionable recommendations for policy reforms, programmatic interventions, and investment strategies aimed at improving the impact of Ethiopia's food systems policies on access to vegetable-rich diets in urban setting.

Figure 3 Steps and main tools



3 Country food systems policy review

3.1 Food system policy documents

Food systems encompass the entire range of actors, and their interlinked value-adding activities involved in the production, marketing (aggregation, processing, distribution, disposal of food products) and consumption of food. This also includes the food environment, including physical and economic access to food (proximity and affordability); food promotion, advertising, and information; and food quality and safety – all of which influence food choices, acceptability and diets. According to the HLPE definition, a food system gathers all the elements (environment, people, inputs, processes, infrastructures, institutions, etc.) and activities related to the production, processing, distribution, preparation, and consumption of food, along with the outputs of these activities, including socio-economic and environmental outcomes (HLPE, 2017).

In Ethiopia, policy began to embrace the wider food system in 2018, with more explicit food environment interventions becoming apparent (Trübswasser et al., 2022). In recent years, the Ethiopian government has introduced multi-sectoral national food and nutrition policies and strategies as part of its commitment to promote nutrition-sensitive agriculture, reduce stunting, and achieve the country's development goals. Since 2018, Ethiopia

has shifted its conceptualisation of the food system to consider nutrition across agri-food production and consumption. These policies are led by public sector, primarily the Ministry of Agriculture (MoA) and the Ministry of Health (MoH), but they are multi-sectoral in nature and involve various stakeholders, who, directly or indirectly, are engaged in delivery of food systems outcomes. A rapid appraisal of 26 food system-related policies developed over the past two decades reveals a gradual and positive shift in the government's approach towards more holistic policy design. However, the implementation of these policies often falls short of fully embracing a systemic and multi-sectoral approach.

The Ethiopian government and its partners, including the World Bank, United Nations Food and Agriculture Organisation (FAO) and other UN agencies, non-governmental organisations (NGOs) and universities, have embarked on a process of food systems transformation, guided by the vision of achieving healthy diets for the population. Recent policy documents, like the Ethiopia Food Systems (EFS) transformation vision, draw lessons from global experiences and build on past initiatives like the Seqota Declaration (FDRE, 2021b) – a high-level commitment by Ethiopian government to end stunting in children under two years by 2030. The process of developing the EFS vision involved

conducting national dialogues and designing a food systems roadmap and a position paper. The EFS vision was launched in 2021 with a commitment to conclude implementation by 2030. The review indicates that this vision and other recent policies have succeed to some extent in addressing eight food environment domains – availability, affordability, convenience, promotion, quality (desirability), sustainability, safety, and cultural and social context. However, when compared to global best practices, there

are major gaps in tackling food and nutrition problems, especially related to food promotion, processing, retail, pricing and trade.

As indicated in Table 2, agricultural strategies and programmes have become more nutrition-sensitive, and policies such as the 2008 National Nutrition Strategy have complementary action plans and related programmes that continued over the years with a satisfactory degree of progress in tackling nutrition issues.

Table 2 List of national food systems policies

Period	Food, nutrition and health	Agriculture and environment (horticulture and others)	Disaster risk and social protection	Trade and investment, and finance
2008–2017	<ul style="list-style-type: none"> • National Nutrition Strategy, 2008 • National Nutrition Program-I (NNP-I), 2008/09 • Seqota Declaration, 2015 • National Nutrition program-II (NNP-II), 2016 	<ul style="list-style-type: none"> • Climate-Resilient Green Economy (CRGE) Strategy, 2011 • Agricultural growth program I (AGP I) (2010-2015) • AGP II – 2015/16-2020 • Nutrition-Sensitive Agricultural Strategy, 2016 • Agricultural Extension Strategy, 2017 	<ul style="list-style-type: none"> • National Social Protection Policy, 2012 • National Policy and Strategy on Disaster Risk Management, 2013 	
2018–2024	<ul style="list-style-type: none"> • Food and Nutrition Policy, 2018 • Food and Medicine Administration Proclamation, 2019 • National Strategic Action Plan for NCDs, 2020 • National Food and Nutrition Strategy, 2021 • Seqota Declaration – Roadmap for Expansion and Scale-up, 2021 • National Food Safety and Quality Strategy-For Primary Agricultural Produce, 2024 (2024–2030) 	<ul style="list-style-type: none"> • Green Legacy, 2019 • Ten-Year Agricultural Development Plan, 2021 • The Horticulture Policy, 2021 • Horticulture Roadmap, 2021 • Ethiopia Food Systems Resilience Program, 2023 • National Nutrition Sensitive Agri-Food Systems Strategy, 2024 (2024–2030) • Postharvest Management Strategy, 2024 (2024–2030) 		<ul style="list-style-type: none"> • Investment Proclamation, 1180–2020 • National Financial Inclusion Strategy (NFIS), 2021 • Investment Directive 517-2022 • Ethiopian Trade Policy (draft), 2023 • Fruit and Vegetable Marketing Directive (draft), 2023

The content and depth of each policy document vary, but generally these policies have evolved

beyond particular sector to address a broader scope of the food systems challenges. Some

documents explicitly mention actions related to vegetable sector, while others focus on overall nutrient-dense foods. The long list of proposed solutions span scaling up and diversifying the production and consumption of fruits and vegetables; establishing and enforcing food safety and quality standards; developing and disseminating food-based dietary guidelines; implementing mass media campaigns and behaviour change communication strategies; promoting climate-smart and nutrition-sensitive agriculture practices; reducing post-harvest losses and waste of fruits and vegetables; strengthening market information and intelligence systems; enhancing market linkages and coordination; enforcing market standards and regulations; improving the income and purchasing power of consumers; increasing the availability and accessibility of fruits and vegetables; and strengthening food systems governance and coordination.

The policy documents are categorised into four main policy areas in the following subsections, and a detailed policy scan note is provided in Annex 3.

3.1.1 Policies relating to food, nutrition and health

- **National Nutrition Program-II (NNP-II), 2016:** focused on improving nutritional status across demographics. It specifically encouraged homestead gardening, post-harvest processing and vegetable consumption. Strategies aimed to enhance dietary diversity and food handling practices.
- **Food and Nutrition Policy of Ethiopia (FNP), 2018:** aims to create a self-reliant Ethiopia in terms of food and nutrition. While it doesn't explicitly mention vegetables, most policy directions encompass them. The focus is on improving the availability, accessibility and safety of nutritious foods for all citizens.
- **National Food and Nutrition Strategy, 2021:** based on the 2018 policy, this strategy outlines 13 objectives covering various aspects of food and nutrition security. It emphasises nutrient-dense crops, including vegetables, to ensure a healthy diet. Initiatives include promoting agroecology-based farming systems and strengthening fruit and vegetable gardening.
- **Seqota Declaration (SD) – Roadmap for Expansion and Scale-up Phases 2021–2030:** a follow-up to SD 2015. The commitment aims to end stunting in children under two by 2030. Vegetables play a vital role in improving nutrition. The strategy emphasises nutrient-rich fruits and vegetables, innovative homestead gardening, and household diet diversity.
- **Food and Medicine Administration Proclamation No. 1112/2019:** ensures food safety and compliance, specifically mentioning vegetables in the definition of follow-up formula.
- **National Strategic Action Plan for NCDs, 2020:** targets healthy diets, including fruit and vegetable consumption.

3.1.2 Policies relating to agriculture and environment

- **Nutrition-Sensitive Agricultural Strategy (NSAS), 2016:** integrates nutrition into agriculture policies, promoting diversified and nutrient-dense foods, including vegetables. Women's empowerment and sector coordination are also key components, ensuring a holistic approach to improving food security and nutrition.
- **National Nutrition-Sensitive Agri-Food Systems Strategy, 2024–2030:** aims to improve food and nutrition security. It emphasises diversified nutrient-dense crops, including leafy vegetables. Initiatives include promoting safe vegetable production and establishing nutrition demonstration centres.
- **Ten-Year Agricultural Development Plan, 2021:** links with the FNP. Vegetable-related interventions focus on technology generation, improved seeds and export-oriented horticultural produce. Agricultural extension includes training and demonstrations.
- **Agricultural Extension Strategy, 2017:** aims to enhance food and nutrition security through pluralistic extension services. It emphasises nutrition-sensitive extension, including women's empowerment and vegetable production.
- **Agricultural Growth Program (AGP I and AGP II):** promotes dietary diversity through nutrient-dense crops, post-harvest handling, and food safety. It indirectly contributes to food security and nutrition.

- **Environment Policy – Climate-Resilient Green Economy (CRGE) Strategy, 2011:** while not explicitly mentioning vegetables, CRGE recognises sustainable agricultural practices for food security and climate resilience.
- **Green Legacy Initiative, 2019:** although not directly related to vegetables, this initiative indirectly contributes to food security by planting valuable seedlings, including fruit trees.

3.1.3 Policies relating to disaster risk reduction and social protection

- **National Policy and Strategy on Disaster Risk Management, 2013:** the holistic approach to disaster risk management indirectly impacts nutrition and agricultural production, including vegetable systems.
- **Disaster Risk Management Policy, 2013:** this comprehensive framework aims to enhance disaster prevention and preparedness capacities. While not explicitly focused on nutrition and agriculture, its holistic approach indirectly impacts these areas through principles such as prevention, preparedness and resilience.
- **National Social Protection Policy, 2012:** providing a comprehensive framework, this policy focuses on social safety nets, livelihood schemes, and addressing inequalities. While nutrition is part of basic services, the broader scope contributes to overall well-being.

3.1.4 Policies relating to trade, investment and finance

- **Ethiopian Trade Policy, 2023 (draft):** the draft policy emphasises international and domestic trade, but does not specifically mention vegetables.
- **Fruit and Vegetable Marketing Directive, 2023 (draft):** this directive targets horticulture, including vegetables, fruits and root crops, defining roles for stakeholders.
- **Investment Proclamation, 2020:** horticulture benefits from investment incentives, including tax exemptions.
- **Investment Directive, 2022:** detailed information on investment incentives, with horticulture qualifying as beneficiary of the incentive package.
- **National Financial Inclusion Strategy (NFIS) II, 2021–2025:** while not food-specific, it aims to enhance financial inclusion, including agricultural finance initiatives.

Ethiopia's food systems policy landscape in the last decade demonstrates progression toward integrating nutrition-sensitive strategies across multiple sectors. Initially, policies primarily addressed nutrition through broad food security measures, but over time there has been a growing emphasis on dietary diversity, particularly the role of nutrient-dense crops like vegetables. This reflects a shift from addressing malnutrition through direct interventions toward a more systemic approach that considers agricultural production, environmental sustainability and economic access. While earlier frameworks laid the foundation for improving food availability and safety, recent strategies explicitly promote vegetable consumption,

agroecology-based farming and diversified diets, aligning nutrition goals with agricultural and environmental policies. However, gaps persist in linking production incentives, market accessibility and affordability measures to ensure that policy objectives translate into tangible dietary improvements.

The multi-sectoral nature of Ethiopia's food policy framework is evident in its alignment across health, agriculture, social protection and trade policies. While nutrition policies emphasise dietary diversity and food safety, agriculture policies increasingly integrate nutrition-sensitive strategies, recognising the role of diversified cropping and climate-resilient farming. Additionally, trade and investment policies highlight the potential of horticulture, though explicit links to nutrition remain underdeveloped. Disaster risk reduction and social protection frameworks contribute indirectly by addressing vulnerabilities that impact food security and dietary outcomes. Despite this cross-sectoral approach, effective policy coordination remains a challenge, requiring stronger institutional linkages, enforcement mechanisms and investment strategies to enhance the implementation of nutrition-sensitive policies across sectors.

3.2 Case 1 – National Food and Nutrition Policy

3.2.1 Policy coverage

The FNP's coverage and aim are set out in Table 3. The policy aims to achieve optimal nutritional status across all life stages, reinforcing broader national goals of enhanced quality of life, increased productivity, and improved longevity.

Table 3 FNP coverage summary

Period	Dimensions	Summary
Identification	Policy title	Food and Nutrition Policy of Ethiopia
	Date of adoption	2018
	Policy type	Public health policy and food security policy
Policy aims and objectives	Overall aim(s)	To attain optimal nutritional status at all stages of life, consistent with a high quality of life, productivity, and longevity.
	Specific objectives	<ol style="list-style-type: none"> 1. Ensure the availability and accessibility of adequate food for all Ethiopians 2. Improve nutrition services equitably across all life stages 3. Enhance consumption of diversified and nutritious diets 4. Improve food safety and quality throughout the value chain 5. Reduce food and nutrient losses 6. Strengthen emergency risk management 7. Enhance nutrition literacy.
Means and activities planned	Means	New legislation, resource allocation, capacity building, research, education, partnerships, infrastructure development, monitoring, evaluation, advocacy and emergency response.
	Activities	Nutrition education, food fortification, agricultural development, healthcare services, social protection, nutrition screening, community-based interventions, food security monitoring, research, and policy coordination.
Implementing agency and budget	Implementing agency	MoA, MoH, Ministry of Education (MoE), National Food and Nutrition Policy Council, regional and local government authorities, development partners and NGOs.
	Programme approved	(Not specified)
	Budget allocated	(Not specified)
Policy coherence	Consistency	In general, it aligns with relevant national policies (agriculture, health, etc) to address malnutrition and improve overall health.
	Complementarity and trade-offs	Intersects with other sectors like agriculture, healthcare, and education. The policy actions are a generic list; there is an overall complementarity, but attention is needed for synergy and any trade-offs in specific interventions.
Intended impact on vegetable production, marketing, and consumption	Production	No direct mention of vegetables, but policy directions encompass them. Strategies include enhancing production, safety, and postharvest management.
	Marketing and distribution	There is no specific mention of vegetable marketing and distribution actions.
	Vegetable consumption	No specific actions related to vegetable consumption. Enhancing diversified and nutrition diets and nutrition literacy are among the main objectives of the policy.

3.2.2 Timeline

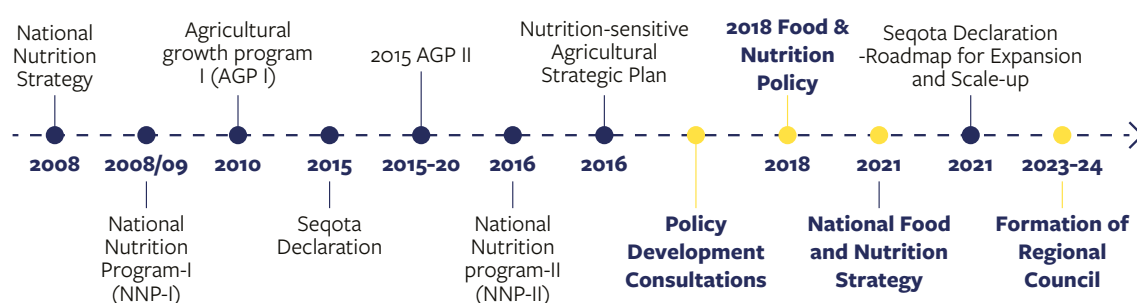
The adoption of the FNP in 2018 marked a significant milestone in the country's policy evolution, building on earlier fragmented strategies and strengthening multi-sectoral coordination.

Initially, nutrition policy efforts were largely led by the MoH, with limited engagement from the MoA. This sectoral disconnect was evident in the development of the 2008 National Nutrition Strategy, which primarily focused on health-based interventions.

However, recognising the critical role of agriculture in shaping food and nutrition outcomes, key stakeholders – including development partners – facilitated exposure visits to Brazil and other countries. These visits played a pivotal role in demonstrating successful nutrition-sensitive agricultural approaches, ultimately fostering greater buy-in from the MoA. This shift in perspective contributed to the subsequent endorsement of the NSAS, signalling an increasing recognition of food systems' role in addressing malnutrition.

Building on this momentum, discussions among government entities and development partners, including the World Bank and the Global Alliance for Improved Nutrition (GAIN), led to the decision to formulate a more comprehensive and integrated FNP before advancing further strategies. A Country Food and Nutrition Coordination Body, housed under the Office of the Prime Minister, was tasked with overseeing the

policy development process. This body, supported by a technical committee and senior consultants, facilitated iterative consultations and multi-stakeholder engagement. Despite efforts to institutionalise coordination through a memorandum of understanding and biannual monitoring, gaps remain in terms of enforceable accountability mechanisms, as no binding partnership strategy or bylaws were established. The policy development process, spanning two years, culminated in the production of three key documents: the Amharic and English versions of the policy and a detailed process documentation report. While this policy represents a significant advancement, ensuring its effective implementation will require stronger institutional mechanisms, cross-sectoral commitment, and legally binding frameworks for accountability. Key milestones in this policy evolution are depicted in Figure 4.

Figure 4 FNP development timeline

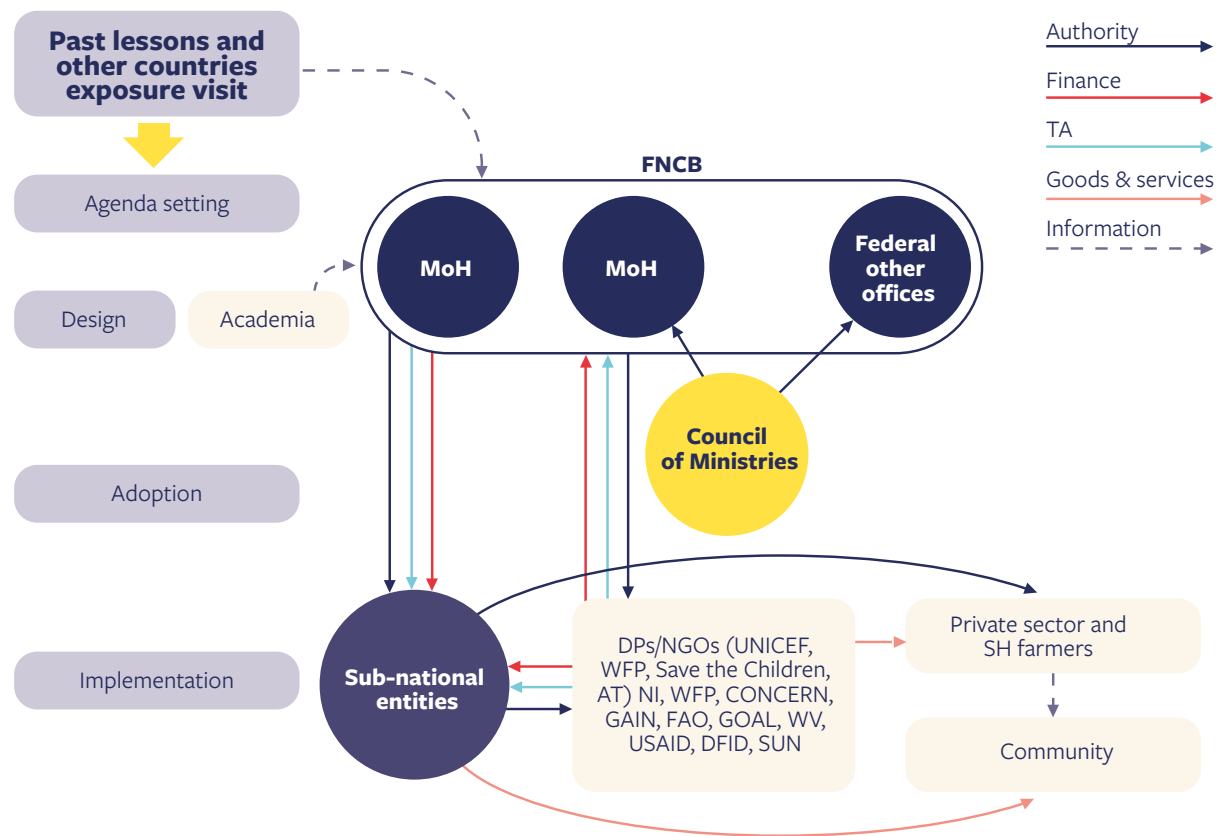
3.2.3 Stakeholder engagement

Ethiopia's nutrition policy landscape has been shaped by active engagement from development partners, reflecting a long-standing commitment to addressing malnutrition. Since the formulation of the first National Nutrition Strategy in 2008, international organisations and non-governmental actors have played a key role in shaping policy directions. The development of the FNP was guided by the Food and Nutrition Coordination Body, co-led by the MoH and the MoA, ensuring cross-sectoral collaboration. Throughout the policy development process, various development partners participated in consultation workshops, offering both technical expertise and financial support to strengthen policy formulation and implementation.

The influence of international organisations was particularly evident during the early stages of agenda setting and framework development. Institutions such as GAIN and the World Food Programme contributed to shaping the policy landscape, while other stakeholders, including UNICEF, Save the Children

and Alive & Thrive, played instrumental roles in refining policy objectives and strategies. The MoH, with sponsorship support, facilitated exposure visits and collaborative learning opportunities to inform best practices. The MoH and MoA, backed by the Council of Ministers, continue to lead policy implementation in collaboration with other ministerial bodies, with sustained support from development partners and NGOs. Academia was also engaged, particularly during the policy design phase, contributing research-based insights aligned with institutional priorities related to nutrition. However, the level of academic involvement varied, often depending on the specific objectives of participating organisations. While subnational entities including local governments were not involved in or had minimal influence over the policy agenda design and adoption, they were a partner to the national government for implementation of measures.

Figure 5 Stakeholder roles in developing the FNP



3.3 Case 2 – National Nutrition-Sensitive Agri-Food Systems Strategy (2024–2030)

3.3.1 Policy coverage

The NNAFSS (2024–2030), endorsed in March 2024, builds on insights from previous policy frameworks to strengthen Ethiopia’s food and nutrition security. As outlined in Table 4, the strategy prioritises enhancing food availability, accessibility, affordability and quality while promoting diverse, safe and nutritious diets. It was informed by an assessment of the 2016–2021 NSAS, incorporating lessons learned and aligning with evolving national

and global food and nutrition priorities. This adaptive approach ensures the strategy remains responsive to emerging challenges and opportunities in the food system, reinforcing its role in achieving sustainable nutrition outcomes.

Table 4 NNAFSS coverage summary

Aspect	Dimensions	Summary
Identification	Policy title	National Nutrition-Sensitive Agri-Food Systems Strategy (2024–2030)
	Date of adoption	2024
	Policy type	National strategic framework or policy initiative
Policy aim and objectives	Overall aim(s)	Improve food and nutrition security for all Ethiopians by enhancing food availability, accessibility, affordability, and quality. Promote diverse, safe, and nutritious diets.
	Specific objectives	<ol style="list-style-type: none"> 1. Ensure availability and accessibility of diverse, safe, and nutritious food 2. Enhance resilience in vulnerable communities (agrarian, agro-pastoral, pastoral) 3. Improve post-harvest technology, value addition, quality, and safety management 4. Enhance consumption of diversified, nutritious, safe, and healthy diets 5. Strengthen food and nutrition organisational structures 6. Empower women, youth, and people with special needs in nutrition-sensitive agri-food systems.
Means and activities planned	Means	Policy integration, agricultural diversification, capacity building, nutrition education, improving access to nutritious foods, research, innovation, policy advocacy, coordination, monitoring, and evaluation.
	Activities	Promotion of nutrient-dense crops, agricultural extension services, nutrition education, women's empowerment, food processing, market access, sustainable agricultural practices, data collection, and institutional strengthening.
Implementing agency and budget	Implementing agency	Ministry of Agriculture (MoA) – Ministry of Health (MoH) – Regional Agricultural Bureaus – Ethiopian Institute of Agricultural Research (EIAR) – Regional Health Bureaus – Development Partners and NGOs – Private Sector and Farmers' Organisations (specific details not provided). There is no effective engagement or enforceable partnership strategy for the stakeholders.
	Program approved	Not specified
	Budget allocated	\$234,703,326 The budget is estimated for the major activities that are identified to be accomplished during the strategy period.
Policy coherence	Consistency	Aligned with relevant policies (agriculture, health, climate resilience, gender equality, poverty reduction). Enhances overall nutrition and food security outcomes. As it is a general policy, it lacks a mechanism for consistently and equally impacting all regions and communities in the country.
	Complementarity and trade-offs	Complementary provisions include agricultural diversification, nutrition education, infrastructure development, research, and policy coordination. Potential competition: production priorities, land use, water resource management, market dynamics, and infrastructure investments. Among others, important elements including the balance among production, trading and consumption culture, harmony and adoption of policy contents by regional-zone level and woreda-level ¹ administrative bodies, sustainability of the system, etc. are not specifically indicated. Moreover, the weak coordination of efforts of a number of actors, particularly at lower governance levels, and implementation phases in terms of ensuring harmony and complementary performance of the government and that of non-government institutions.
Intended impact on vegetable production, marketing, and consumption	Production	Aims to increase diversified nutrient-dense crop production, including leafy vegetables. Strategies include Good Agricultural Practices (GAP) implementation, promoting safe post-harvest technologies, and establishing horticultural nurseries.
	Marketing and distribution	No specific action indicated.
	Vegetable consumption	No specific mentions of vegetables but enhancing the consumption of diversified, nutritious, safe, and healthy diets is one of the objectives. Empowering women, youth, and people with special needs in nutrition-sensitive agri-food systems is considered.

¹ A woreda is a district or administrative division of Ethiopia.

3.3.2 Timeline

The NNAFSS followed a structured, multi-stage process. It began with a review of the 2016–2021 NSAS, assessing its impact and identifying gaps. Key stakeholders, including government ministries and development partners, conducted

consultations and incorporated emerging national and global food and nutrition priorities into the revised framework. Iterative discussions and validation workshops ensured the strategy’s relevance and feasibility. After months of refinement, the strategy was endorsed in March 2024.

Figure 6 Timeline of NNAFSS



3.3.3 Stakeholder engagement

The Strategy was developed through a collaborative and multi-stakeholder approach, ensuring broad input and technical expertise. A technical working group comprising experts from key government ministries – the MoA, MoH and MoE – led the drafting process, supported by development partners such as Save the Children, Alive and Thrive, and the FAO. Strategic oversight was provided by a core team that included eight senior executives from MoA, alongside representatives from FAO and Save the Children International. As illustrated in Figure 7, government representatives, primarily from MoA, constituted 57% of the participants in the

strategy development, while international NGOs, notably Save the Children, accounted for 24%. The private sector had only one participant, and research centres were the only non-governmental institutions involved. Sub-national actors were initially absent from the technical drafting process but were later engaged through broader stakeholder consultations. The draft strategy was reviewed by an expanded group, including sub-national representatives and other key stakeholders, whose feedback was integrated into the final document.

Upon finalisation, the strategy was formally approved and launched by MoA, with the participation of diverse stakeholders. As a national framework,

it sets clear targets, indicators, and a cost estimate for implementation from 2025 to 2030. Despite its inclusive development process, the limited representation of the private sector, civil society and sub-national actors in

the early stages suggests potential gaps in localised implementation and cross-sectoral integration. Future efforts should prioritise stronger multi-level engagement to enhance policy ownership and effectiveness.

Figure 7 Strategy development core and technical members composition

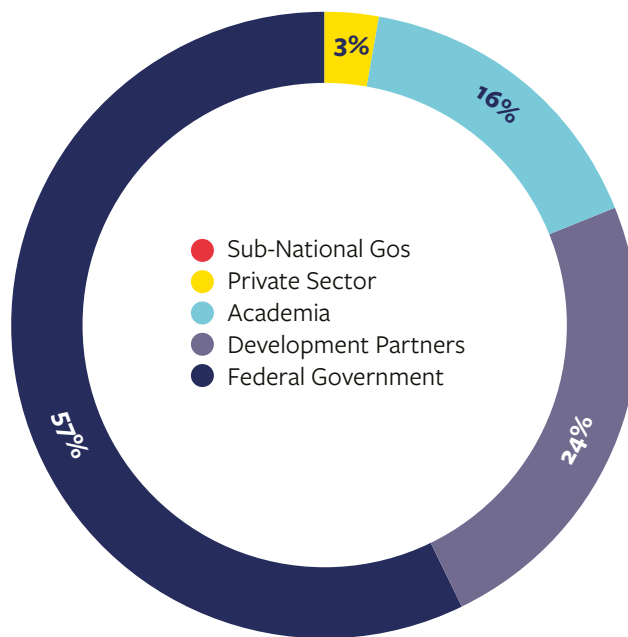


Figure 9 illustrates the multi-level relationships and influence dynamics in the development and implementation of the strategy. The agenda setting, design and adoption stages were heavily influenced by lessons from the 2016–2021 NSAS, new policy directions, and global trends. The MoA maintained a strong influence over sub-national offices, with bidirectional communication (green arrows) ensuring feedback loops.

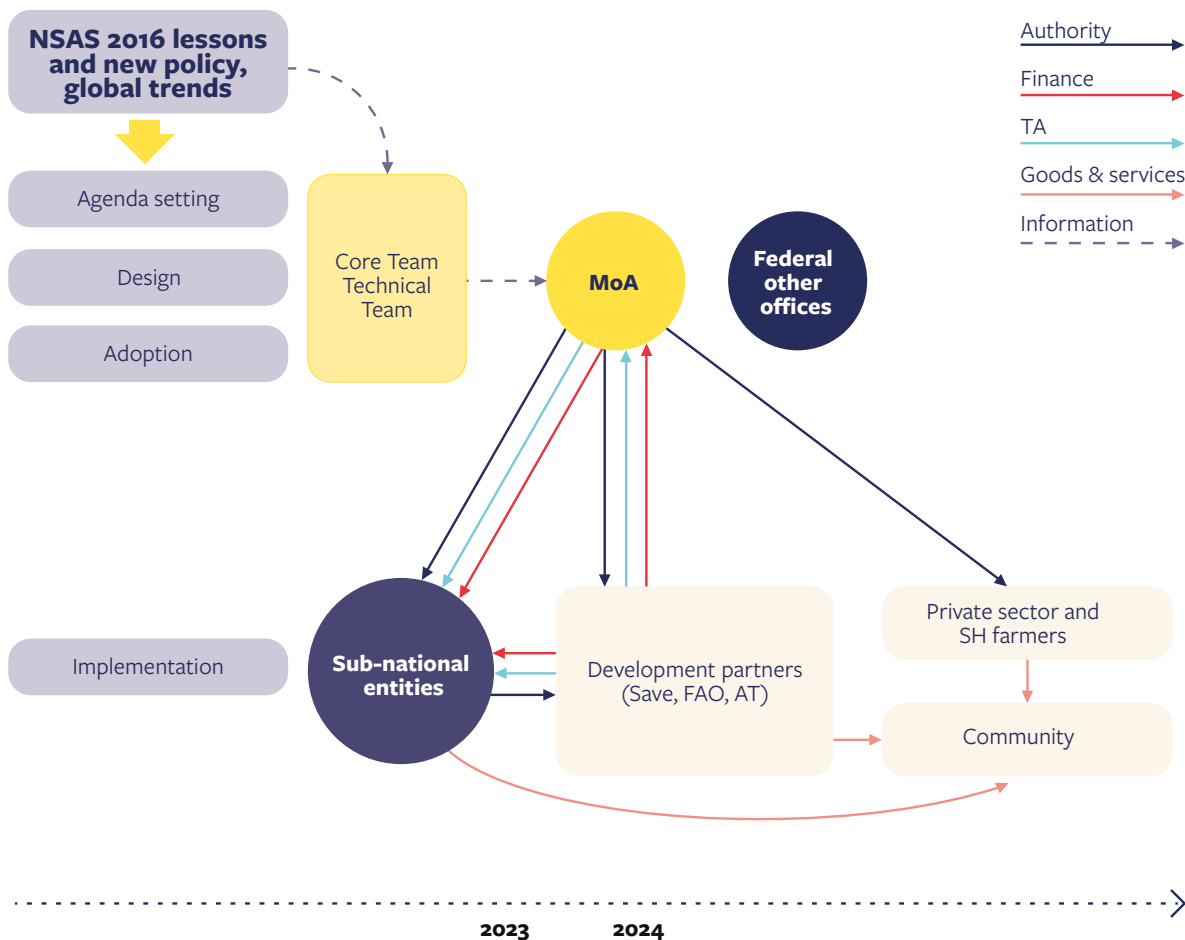
Similar to the previous case, sub-national entities had less direct engagement in the

earlier stages but became central actors in implementation, receiving guidance from both MoA and development partners. Development partners played a critical role in supporting both sub-national entities and community-level implementation, leveraging financial and technical resources. The private sector and smallholder farmers were positioned at the community level, indicating their role as end beneficiaries and contributors to local implementation. Their engagement was facilitated primarily through development partners and

sub-national entities rather than direct involvement in policy design. The flow of influence shifted over time, with early-stage policymaking dominated by federal actors, while later stages saw increased

engagement from decentralised entities, NGOs and private sector actors. The structure highlights a top-down policy development approach with a more decentralised implementation strategy.

Figure 8 Stakeholders' roles in NNAFSS process



3.4 CASE 3 – Ethiopia Food Systems vision 2030

3.4.1 Policy coverage

The EFS vision aims for a holistic shift ranging nature-positive food production to sustainable consumption patterns. As indicated in Table 5, this transformation is structured around three key pillars

– federal, regional/sub-national, and partnerships – with the MoA and MoH leading the effort alongside 16 inter-ministerial entities, development partners and sub-national agencies.

Table 5 EFS vision coverage summary

Aspect	Dimensions	Summary
Identification	Policy title	Ethiopia Food Systems (EFS) Vision 2030
	Date of adoption	July 2021
	Policy type	National vision/strategy
Policy aim and objectives	Overall aim(s)	A holistic transformation of Ethiopia's food systems from nature-positive production to sustainable consumption patterns.
	Specific objectives	Promote enhanced food safety, nutrition, and healthy diets; improve equitable livelihood and land preservation; build resilience to shocks and stress.
Means and activities planned	Means	Diagnostic study, roadmap preparation, aligning policy and coordination; onboarding development partners and stakeholders; forming inter-ministerial and other governance structures; coordination unit formation, socialisation, education, and implementing 24 game-changing solutions. For implementation: political and operational buy-in, socialisation to relevant organisations, media campaign, regional-level implementation, and financing EFS.
	Activities	The EFS has identified and finalised 24 game-changing solutions, clustered into 7 categories; 165 interventions (160 aligned, 97%); 605 activities (481 aligned, 80%).
Implementing agency and budget	Implementing agency	Lead MoA and MoH with 16 inter-ministerial entities, the Agricultural Transformation Institute (ATI) with coordination role/secretariat, and other two layers (sub-national entities mainly for implementation and development partners). Proposed three pillars (federal, regional/sub-national, partnerships).
	Program approved	Aligned interventions: 165 interventions with 160 aligned with existing government and development partners' programmes (e.g., Food Systems Resilience Program, Seqota Declaration).
	Budget allocated	Total budget for EFS activities: 185.11 billion birr; an additional 1.9 billion birr is required after aligning with the government budget and commitment from development partners.
Policy coherence	Consistency	Aligned with SDGs and UNFSS; also aligned with other relevant policies in the country related to agriculture, health, and nutrition.
	Complementarity and trade-offs	Efforts made to align and create synergy across interventions and policies through clustering.
Intended impact on vegetable production, marketing, and consumption	Production	The 24 game-changing solutions in the roadmap are directly or indirectly related to vegetable production, marketing, and consumption. Examples include: EFS GC 2: Support diversified food production for nutrient-dense foods (animal-sourced and plant-based) through smallholder, greenhouse, and garden-level production; EFS GC 19: Modernise and upscale indigenous food production and processing for general population consumption; EFS GC 1: Strengthen national food safety management and control systems; EFS GC 18: Promote agricultural commercialisation by creating specialisation corridors for nutrient-dense commodities and strengthening market linkages (e.g., agro-industrial parks).
	Marketing and distribution	There are solutions proposed that relate to EFS GC 8: Strengthen innovative supply chain management and handling systems, particularly for nutrient-dense crops (fruit, vegetables, and animal-sourced foods).
	Vegetable consumption	In consumption, there are solutions that directly and indirectly contribute, including EFS GC 9: Sustain awareness creation and food and nutrition literacy to change consumer behaviour toward nutrient-dense and safe food, empowering women's leadership in food systems.

The strategy emphasises food safety, improved nutrition and equitable livelihoods while ensuring resilience to shocks and environmental sustainability. Implementation is guided by a diagnostic study and roadmap preparation, incorporating policy alignment, stakeholder coordination and governance mechanisms such as an inter-ministerial coordination unit. The EFS also prioritises socialisation efforts, media outreach and regional-level implementation to secure both political and operational buy-in. With an estimated total budget of 185.1 billion birr (US\$1.4 billion), plus an additional 1.9 billion birr in financing needs, required for implementation, the EFS integrates 165 interventions and 605 activities, with 97% alignment to existing programmes like the Food Systems Resilience Program and the Seqota Declaration.

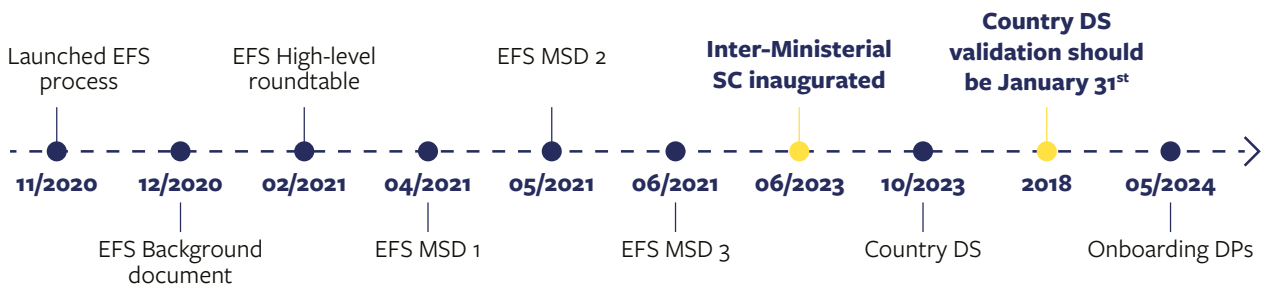
A central feature of the EFS is its 24 ‘game-changing solutions’, categorised into seven clusters aimed at enhancing food production, marketing, and consumption. On the consumer side, the EFS envisions shifting dietary behaviours through sustained awareness campaigns and nutrition literacy programmes, particularly emphasising women’s leadership in food systems. This element could be an entry point to directly link the measures to promoting vegetable-rich diet and engaging and empowering local and municipal governments and consumers and citizen groups. The strategy is aligned with global frameworks, including the Sustainable Development Goals (SDGs) and the UN Food Systems Summit (UNFSS), ensuring coherence with national policies across

agriculture, health, and nutrition. By clustering interventions and fostering synergy, the EFS tries to minimise policy fragmentation and enhances implementation efficiency.

3.4.2 Timeline

The EFS vision process, as illustrated in Figure 9, was initiated in November 2020 in response to the UN Secretary-General’s call for member states to conduct national food systems consultations. To guide this effort, a high-level expert panel developed a manual, outlining key action tracks and a background document to inform discussions. Three rounds of national stakeholder consultations were conducted, gathering insights from government entities, development partners and civil society organisations (CSOs).

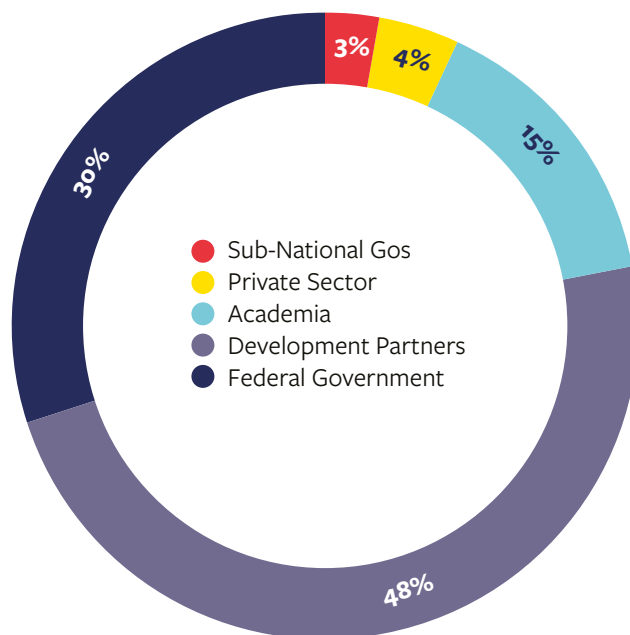
By June 2021, the EFS roadmap and country position paper were finalised and officially launched, providing a strategic framework for food systems reform. These documents were presented at the first UNFSS in September 2021, marking Ethiopia’s commitment to the global agenda. Following this, an inter-ministerial secretariat was established to oversee implementation, a comprehensive country diagnostic study was conducted, and development partners were actively engaged to strengthen resource mobilisation and coordination. The government further reaffirmed its commitment by participating in UNFSS+2, where it shared progress updates and reaffirmed its dedication to sustainable food systems transformation.

Figure 9 Timeline of EFS vision

3.4.3 Stakeholder engagement

The agenda-setting and design phases of the policy process were characterised

by significant engagement of multiple stakeholders, with approximately 130 participants contributing to the consultations.

Figure 10 Multi-stakeholder dialogue participants

As reflected in the technical synthesis report (ATI, 2024), the majority of participants (48%) were development partners, including donors, NGOs, and policy networks, underscoring their dominant role in shaping policy discussions and providing technical and financial support. The federal

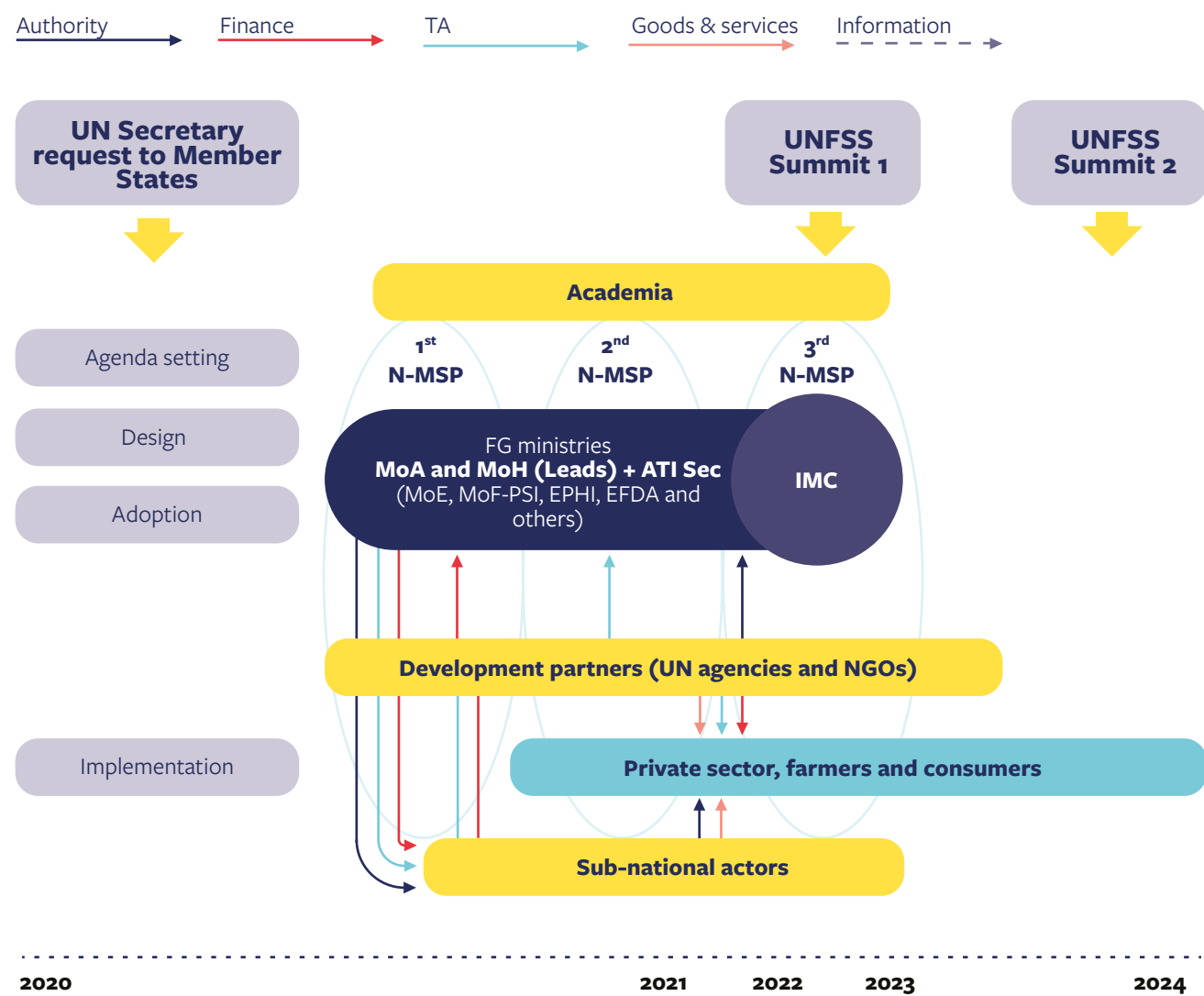
government accounted for 30% of the participants, comprising representatives from key ministries such as the MoA and MoH as well as the ATI, signifying strong government lead and ownership in the policy formulation process. Other key stakeholders included academia (15%), primarily universities

and national and international research centres, contributing to evidence-based policymaking. Sub-national government offices (3%) – such as regional bureaus of trade, industry, and livestock – had minimal representation, raising concerns about the inclusivity of decentralised governance structures in food systems decision-making. Similarly, the private sector (4%) had a limited presence, highlighting a potential gap in engaging businesses,

particularly those in food production, supply chains and agribusiness. The lower representation of these sectors suggests the need for greater integration of private sector innovation and regional-level implementation perspectives in future policy dialogues.

Figure 11 illustrates the multi-layered stakeholder relationships and influence in the EFS process.

Figure 11 Stakeholder engagement and roles in EFS process



At the agenda-setting stage, the UN Secretary-General's call initiated national consultations, engaging academia and expert panels to establish a technical foundation. During design and adoption, federal ministries, led by the MoA and MoH with ATI as secretariat, played a central role in ensuring policy coherence and alignment. Development partners, including UN agencies and NGOs, provided financing and technical support, contributing through multi-stakeholder platforms. The Inter-Ministerial Committee coordinated cross-sectoral integration, while private sector actors, farmers and consumers had limited influence early on but gained relevance during implementation. Similarly, sub-national actors focused on execution rather than policy design, highlighting a gap in decentralised decision-making. The flow of influence (coloured arrows) reflects a top-down approach, with federal ministries and development partners shaping policy, while sub-national governments, private entities and communities engaged mainly during implementation. This underscores the need for stronger bottom-up feedback to integrate local priorities into national policy.

competitiveness, integrating enterprises into regional and global value chains, expanding market access, facilitating digital commerce, promoting competitive exports, ensuring consumer protection, and maintaining macroeconomic stability. The policy outlines a phased implementation, beginning with capacity-building for institutions, progressing to trade liberalisation and World Trade Organization (WTO) accession, and ultimately diversifying exports and attracting investments. While the Ministry of Trade and Regional Integration leads implementation, full programme details and budget allocations remain unspecified. Policy coherence is emphasised through alignment with the SDGs and Ethiopia's Industrial Policy, Environmental Policy and Education Policy, although explicit links to food systems policies are lacking. The trade policy does not directly address vegetable production, marketing or consumption but seeks to improve overall market efficiency, which could indirectly benefit the sector by enhancing trade infrastructure and affordability. However, a more detailed sectoral strategy in subsequent policy documents is needed to ensure targeted support for agricultural trade, including vegetables.

3.5 Draft Ethiopian Trade Policy

3.5.1 Policy coverage

The Ethiopian Trade Policy (draft, 2023) aims to create an efficient domestic market system and a competitive international economy, fostering economic development through strengthened trade systems. Its objectives include enhancing private sector

Table 6 Ethiopia Trade Draft Policy coverage summary

Review aspect	Dimensions	Summary
Identification	Policy title	Ethiopia Trade Policy (draft), 2023
	Date of Adoption	Not yet, Council of Ministers to adopt it
	Policy type	Policy
Policy aim and objectives	Overall aim(s)	The trade policy envisions an efficient domestic market system and a competitive international economy. It aims to foster economic development by building robust domestic and export trade systems, contributing to poverty reduction and sustainable growth.
	Specific objectives	1. Enhancing private sector productivity and competitiveness 2. Coordinating enterprises in regional and global value chains 3. Creating market access opportunities through trade agreements 4. Facilitating digital commerce 5. Promoting competitive products for foreign markets 6. Ensuring consumer protection and fair competition 7. Establishing a stable macroeconomic environment for businesses.
Means and activities planned	Means	The policy outlines short-, medium-, and long-term execution strategies. The initial focus is on capacity-building for implementing institutions. Subsequent phases include liberalising commerce and joining the WTO. Long-term goals involve diversifying exports and attracting investments.
	Activities	Detailed programmes are yet to be developed but the policy emphasises stakeholder consultation, monitoring, and evaluation.
Implementing agency and budget allocated/programme approved	Implementing agency	The Ministry of Trade and Regional Integration leads policy development and implementation, with other government agencies and development partners participating.
	Program approved	Focus areas are identified, but specific programmes remain to be developed.
	Budget allocated	Government's regular budget and full programme development are mentioned as funding sources.
Policy coherence	Consistency	Policy coherence is crucial for effective governance and sustainable development. When policies align and work synergistically, they maximise impact, avoid conflicting objectives, and address complex challenges. Coherent policies enhance efficiency, promote equity, and contribute to holistic solutions in areas like food systems. The policy aims to align with other relevant policies, including the Industrial Policy, SDGs, Environmental Policy, and Education Policy. Implications for addressing economic challenges like poverty, unemployment and inflation should be clearly incorporated.
	Complementarity and trade-offs	Identifying areas of policy complementarity and potential conflicts is essential. The general nature of the document makes it challenging to discern these aspects clearly, as it does not explicitly link with other food systems policies. Ensuring alignment and integration with existing policies is crucial for cohesive and effective food systems governance.
Intended impact on vegetable production, marketing, and consumption	Provisions stimulating, facilitating, and empowering vegetable sector	No specific mention of vegetable sector. The policy broadly addresses 10 key issues, including domestic trade, macroeconomic environment, investment, market access, and participation in the global value chain.
	Marketing and distribution	The draft policy discusses actions aimed at making the trade function efficiently without specific focus on vegetables
	Vegetable consumption	Not specific to vegetables but aims to make products more affordable with efficient and better trading system.

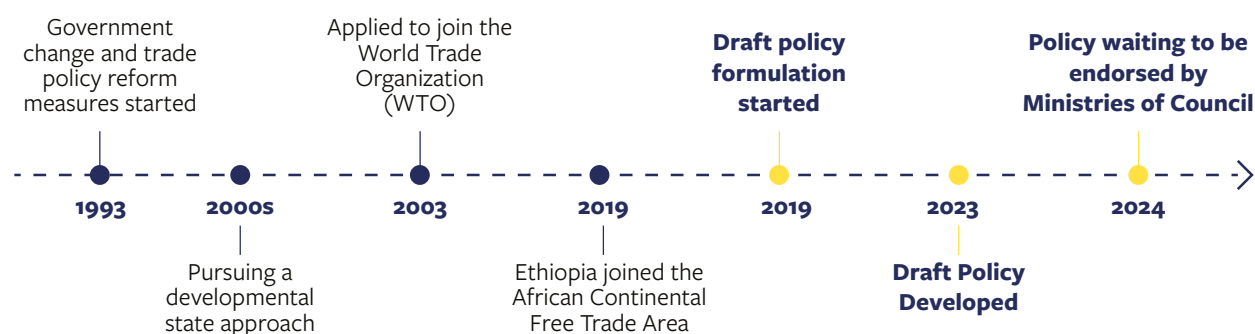
The draft policy presents several critical gaps that require refinement for greater effectiveness. Notably, it lacks sufficient engagement with regional and local governments, such as Adama City, and has not been adequately communicated to urban centres, limiting its potential for localised implementation. Additionally, it fails to address the unique characteristics of nutrient-dense vegetables and fruits, overlooking regional production capacities and supply dynamics. The policy also lacks comprehensive strategies to influence community consumption patterns or deploy marketing tools to counter inflationary pressures. Furthermore, it does not specify concrete programmes or projects to operationalise its vision, nor does it include directives to safeguard consumers from market failures or unfavourable international trade agreements. Another critical omission is the absence of a clear role for the food processing subsector, including its potential contribution to value addition, the marketing of bio-fortified and modified food products, and the engagement of the private sector in strengthening trade infrastructure. Strengthening these aspects would enhance the policy's alignment with Ethiopia's broader economic and food security goals.

3.5.2 Timeline

The formulation of Ethiopia's draft trade policy began in 2019 and has undergone a prolonged development process due to the complexity of trade-related issues and the diverse expertise required, according to key informants. The policy's extended timeline reflects

the need for comprehensive stakeholder consultations, alignment with existing economic frameworks, and consideration of international trade commitments.

As depicted in Figure 12, Ethiopia's engagement in global and regional trade agreements has followed a similarly extended trajectory. The country initially applied for WTO membership in 2003, but the accession process remains incomplete due to outstanding negotiations and compliance requirements. Meanwhile, Ethiopia formally joined the African Continental Free Trade Area in 2019, signalling its commitment to regional economic integration. The delayed policy finalisation underscores the challenge of harmonising domestic trade priorities with global and continental trade obligations, reinforcing the need for a clear roadmap to accelerate implementation.

Figure 12 Timeline of Ethiopian trade policy development

3.5.3 Stakeholder engagement

The development of Ethiopia's trade policy began under the Ministry of Trade and is now led by the restructured Ministry of Trade and Regional Integration (MoTRI). A steering committee, chaired by the Minister, has overseen the process, with representation from key stakeholders such as the Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA), Addis Ababa University, and technical experts. The drafting process received significant support from the United Nations Development Programme, which hired an international consultant to provide technical expertise. Additionally, the Economic Commission for Africa and other development partners have demonstrated a strong commitment by offering both financial and technical assistance to enhance institutional capacity and ensure alignment with international trade frameworks.

The Council of Ministries, responsible for policy adoption, plays a central role in integrating the policy into national

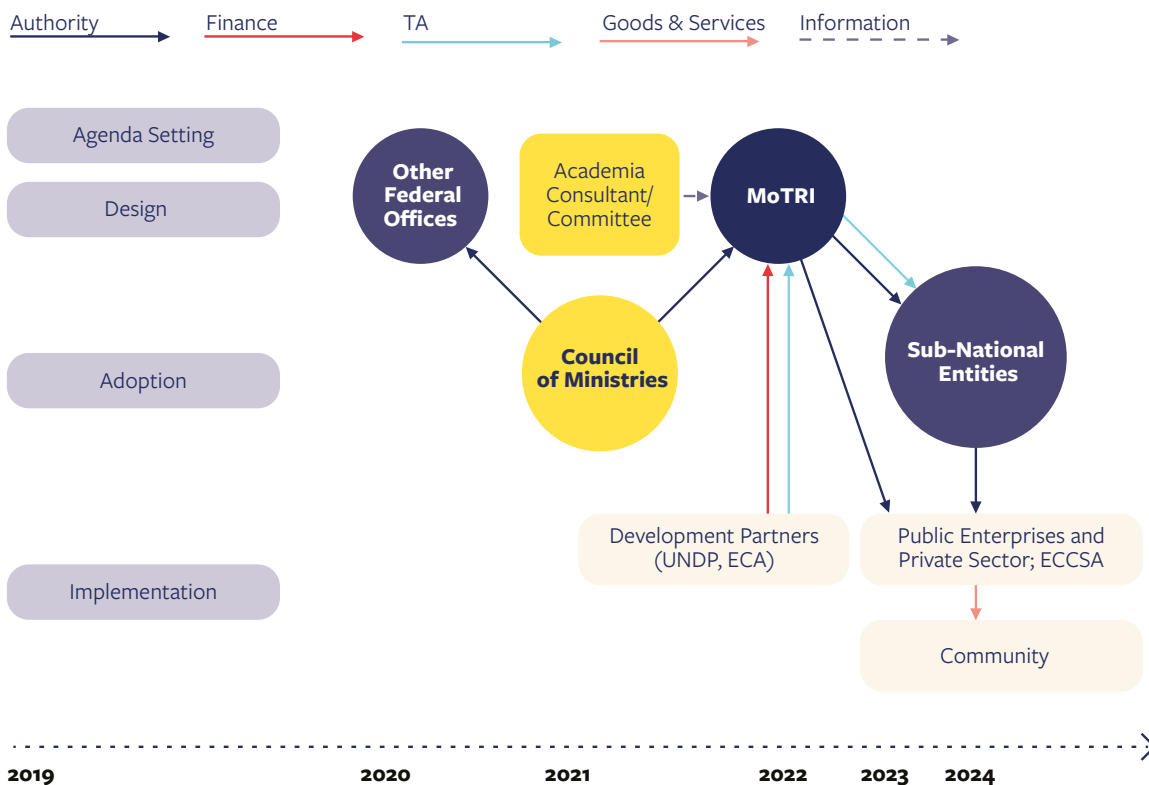
governance structures and ensuring its coherence with broader economic strategies.

Similar to previous policy cases, the policy formulation process has been largely driven by federal institutions, with MoTRI serving as the coordinating body that facilitates interactions between government agencies, development partners and sub-national entities. Academia and consultants contributed by shaping the policy's technical foundation, while development partners reinforced institutional capacity through research support and financial resources. Although private sector actors, including ECCSA and major public enterprises such as the Development Bank of Ethiopia, Ethiopian Airlines, and Ethiopia Electric Power Corporation, actively participated in discussions, their role remained advisory. Similarly, sub-national entities were engaged to a limited extent during the early stages but are expected to play a more significant role in implementation. The overall structure reflects a top-down approach, where federal ministries and development partners drive agenda setting and policy

formulation, while regional governments, private sector actors and communities are positioned primarily within the implementation phase. This approach

highlights a gap in localised trade policy considerations, excluding effective incorporation of regional economic dynamics into national trade strategies.

Figure 13 Stakeholders' role in draft trade policy process



3.6 Policy actions on vegetable production, marketing and consumption

The policy actions outlined in the reviewed documents offer a strategic but somewhat fragmented approach to addressing the challenges in vegetable production, marketing and consumption in Ethiopia. While the policies recognise the need to modernise and expand vegetable production, gaps remain in how they tackle the structural constraints facing

smallholder farmers. The emphasis on supporting diversified food production and commercialisation through specialisation corridors and agro-industrial parks presents a promising framework for scaling up vegetable production. However, limited access to credit, disease-resistant varieties, and efficient post-harvest storage solutions continues to undermine production sustainability. The proposed promotion of GAP and post-harvest technologies is crucial, but without clear implementation mechanisms – such as

targeted financial incentives, extension support, and regulatory enforcement – smallholder farmers may struggle to adopt these improvements. Additionally, the absence of a well-defined role for sub-national governments in localised production strategies suggests a potential disconnect between national policy ambitions and on-the-ground realities.

On the marketing front, policy gaps are even more pronounced. While there is acknowledgment of the structural inefficiencies within the vegetable supply chain, specific regulatory interventions to address price volatility, trader dominance, and market transparency are lacking. The oligopolistic nature of Ethiopia's vegetable market, where a few traders exert disproportionate influence, continues to undermine fair pricing and access for both producers and consumers. Policies that merely promote innovative supply chain management without addressing power imbalances in market control are unlikely to create meaningful change. Furthermore, while government efforts such as consumer associations and Sunday market promotions are mentioned, they remain peripheral interventions rather than structural reforms. In terms of consumption, policy efforts lean heavily on awareness campaigns and food literacy programmes, which, while necessary, may not be sufficient to shift deeply ingrained dietary patterns. Economic barriers to vegetable consumption, including affordability and availability, require direct policy interventions such as subsidies, incentives for local production, and integration of vegetables into public food programmes.

Without these concrete measures, the broader goal of increasing vegetable consumption remains aspirational rather than actionable. The policy landscape, therefore, presents a mix of ambition and oversight, requiring stronger coordination between production, marketing, and consumption interventions to ensure a truly transformative impact on Ethiopia's vegetable sector.

The overall summary of issues related to various segments of vegetable production, marketing, and consumption, as well as proposed actions in the reviewed policy documents, are listed in Table 7.

Table 7 Main issues and proposed actions

Segment	Main issues	Policy actions proposed
Vegetable production	The majority of Ethiopia's vegetable supply comes from smallholder farmers who face several challenges in expanding production. Securing credit for investments in irrigation, quality seeds, and pest control remains a struggle. Crop diversification and staggered planting practices are not widespread, and integrated pest management techniques are underutilised. Additionally, access to disease-resistant varieties is limited. Vegetables also have a short shelf life, requiring proper storage facilities and improved post-harvest practices. Seasonal variations impact both production levels and prices.	The policy actions mentioned in the reviewed cases include supporting diversified food production for nutrient-dense foods, including leafy vegetables, and garden-level production. The aim is to modernise and upscale indigenous food production and processing for general population consumption. Promoting agricultural commercialisation by creating specialisation corridors for nutrient-dense commodities and strengthening market linkages, such as agro-industrial parks, is also emphasised. Additionally, promoting GAP and safe post-harvest technologies are key actions identified.
Vegetable marketing	The dominant marketing channel for vegetables in Ethiopia follows a path from producer to broker, wholesaler, retailer, and finally to the consumer. However, the domestic wholesale vegetable market faces structural challenges, as it tends to be oligopolistic, with a few powerful traders exerting significant influence over prices and distribution. This lack of competition can lead to price volatility, adversely affecting both producers and consumers. Furthermore, prices are often determined by traders rather than market forces, resulting in transparency issues and inefficiencies. To address these challenges, improving infrastructure, such as roads and storage facilities, and streamlining supply chains are critical for reducing post-harvest losses and ensuring timely delivery. While government efforts to encourage consumer associations and Sunday market promotions are in place, these measures do not fully address the wider issues within the market system.	No details were provided in the cases reviewed, but there was mention of strengthening innovative supply chain management and handling systems, particularly for nutrient-dense crops (fruit, vegetables, and animal-sourced foods).
Vegetable consumption	Economic factors and cultural habits significantly shape vegetable consumption patterns in Ethiopia. Traditional diets prominently feature staple foods like teff, maize and sorghum, often relegating vegetables to a supplementary role. Affordability remains a key consideration for most consumers, and limited nutrition interventions combined with strong preferences for common staple foods further constrain vegetable consumption.	Sustaining awareness creation and food and nutrition literacy to change consumer behaviour toward nutrient-dense and safe food; enhancing the consumption of diversified, nutritious, safe, and healthy diets; empowering women, youth, and people with special needs in nutrition-sensitive agri-food systems.

3.7 Multi-level food systems governance – analysis and implications

Governance in food systems refers to the rules, institutions and authorities that collectively oversee and manage societal food-related functions. This governance structure includes the

political, organisational and administrative frameworks used by both state and non-state actors to express their interests, exercise legal rights, make decisions, resolve conflicts, and fulfil responsibilities (Kraak and Niewolny, 2024). According to the UNFSS, food systems governance involves the processes by which societies negotiate, implement and evaluate

collective priorities, fostering a shared understanding of synergies and trade-offs across various sectors, jurisdictions and stakeholders. It integrates decision-making, policy formulation, and coordination of actions related to food production, distribution and consumption. Furthermore, governance structures guide food-related activities through institutional mechanisms, regulatory frameworks, trade agreements and cultural norms that influence food security and sustainability (UN Food Systems Summit, 2021).

Effective governance in food systems requires close coordination among multiple stakeholders, including government ministries, research institutions, the private sector and civil society. This coordination must be both vertical – spanning from national to local levels – and horizontal – ensuring inter-sectoral collaboration among various government departments and stakeholders. Strong governance frameworks prioritise equitable participation, transparency and accountability, recognising the interconnected nature of food systems. A well-functioning governance system defines the roles and responsibilities of all stakeholders while establishing mechanisms for verification, surveillance and monitoring to improve decision-making and responsiveness.

3.7.1 Strengths and challenges in food systems governance in Ethiopia

In Ethiopia, food systems governance shapes policies, regulations and coordination among various ministries and government levels. At the national level, governance influences policy design, regulatory frameworks and coordination efforts, while at the regional level, governance structures impact policy adoption, infrastructure development and business regulations. Local governance, particularly at the municipal level, plays a critical role in determining land use, food accessibility, business operations and service coordination. The Ethiopian government has implemented multiple initiatives to address food security challenges, including malnutrition and stunting. However, the study of four policy cases shows that as a federal system, policy agenda setting, design and drafting remain centralised, with minimal engagement of local and sub-national actors. Despite regional governments having the authority to approve and implement policy directives, the distribution of responsibilities among national, regional and local levels remains vague, often leading to weak coordination and inefficient policy execution. Local governments should be encouraged, capacitated and empowered to develop context-specific frameworks to ensure ownership of policy implementation and a more comprehensive scope of intervention.

A robust governance framework in Ethiopia should incorporate risk

assessments, anticipate uncertainties, and consider local, international and environmental factors affecting food systems. As research indicates, transforming food systems is inherently complex and politically sensitive, requiring integrated governance approaches that balance effectiveness with accountability across different levels. The process must be flexible and responsive to trade-offs and synergies, ensuring that governance structures engage diverse stakeholders in an inclusive and transparent manner. In a country like Ethiopia, political willingness is a critical factor in ensuring the success of food system reforms. Furthermore, granting local governments greater autonomy in establishing context-specific frameworks can enhance both the ownership and effectiveness of policy implementation. While Ethiopia has made some progress in improving governance and coordination, significant challenges remain, necessitating stronger collaboration and more targeted efforts to address inefficiencies.

3.7.2 The political landscape and stakeholder participation

Historically, Ethiopia's political landscape has limited the participation of non-state actors, including the private sector and civil society, in policy processes. The ruling party often dominates policy agenda setting at both regional and national levels, with elite party members occupying top government positions. As a result, non-state actors struggle to participate in policy formulation due to restricted dialogue opportunities, weak institutional capacity, and limited influence. The private

sector remains largely uncoordinated, and independent CSOs lack a strong presence at the community level. In contrast, development partners such as donors and international NGOs possess greater capacity and resources to shape agenda setting, policy design, and implementation, as evidenced in multiple policy review cases.

Global experiences in food systems governance offer valuable lessons for Ethiopia. For instance, Uganda has recently established an inter-ministerial committee to drive food systems transformation through joint planning, monitoring and reporting, building upon past inter-sectoral cooperation. Similarly, Brazil's governance framework for food and nutritional security integrates multi-stakeholder conferences, a national food policy council, and an inter-ministerial government body. These models demonstrate the importance of structured coordination mechanisms and inclusive stakeholder engagement in fostering resilient and sustainable food systems. Ethiopia could benefit from adopting similar governance structures that encourage cross-sectoral collaboration, empower local governments, and ensure the meaningful participation of diverse actors in shaping food policies.

3.8 The role of sub-national actors in food systems governance

Sub-national actors play a pivotal role in the food systems policy process, particularly in translating national policies into actionable local strategies. However,

findings from document reviews and KIIs in Adama City indicate that their engagement at the national level in policy agenda setting and design remains limited. Regional governments, such as the Oromia Regional State – under which Adama City falls – participate in national food systems policy discussions alongside federal institutions, private sector stakeholders, CSOs and research institutions. The extent of their involvement varies depending on the policy framework in question. Typically, once national policies are approved, regional governments adopt and contextualise them within their governance structures, aligning their strategic plans and budgets with national priorities. A notable example is the incorporation of EFS priorities into the strategic plans of regional agricultural bureaus, reflecting an effort to harmonise national policies with regional implementation mechanisms.

Despite these efforts, centralised policymaking continues to dominate, often leading to challenges such as bureaucratic inflexibility, accountability gaps and susceptibility to corruption, all of which hinder effective policy execution. Regional governments serve as crucial intermediaries in implementing policies, adapting national guidelines to fit local agro-ecological and socio-economic contexts. For instance, they may promote climate-smart agricultural technologies suited to their specific environmental conditions and encourage sustainable practices such as agroforestry, soil conservation and water harvesting. Lower administrative entities

within each region further operationalise these policies when they are integrated into regional and local strategic plans. At the municipal level, local actors like the Adama City government play a critical role in implementation. Following directives from regional authorities, city administrations design strategic and annual plans, which shape the scope of local interventions and the support mechanisms available within the food system. Their engagement, therefore, ensures that food systems policies are not only adopted at lower levels but also effectively executed at the community level, ultimately influencing food security and nutrition, market access and sustainable agricultural practices.

3.8.1 Adama City engagement in food systems policies

The Adama City administration operates within an inter-sectoral development framework designed to address food insecurity and ensure minimum consumption requirements for residents. These frameworks are largely adapted from regional government policies, indirectly referencing federal-level policy directives. However, sectoral administrators in Adama City are not highly aware of specific policy initiatives, leading to a passive approach to implementation. As noted by sector offices in Adama, their role is perceived primarily as executing national and regional directives rather than actively shaping local food systems strategies. This top-down approach constrains the city's ability to develop localised, innovative solutions to food systems challenges.

The availability and affordability of nutritious food products in Adama are primarily influenced by the agriculture, health and trade sectors. These sectors collectively determine strategies for increasing the sustainable supply of quality vegetables while regulating market prices. One of the key municipal interventions includes establishing designated marketplaces, such as the Sunday Market, in all sub-cities. These markets provide a direct link between producers, cooperatives and consumers, thereby reducing intermediary costs and ensuring fair pricing. These weekly markets have received mixed feedback regarding the affordability and price of their produce vis-à-vis their role in improving better access to vegetable rich diet in the city.

The city administration also facilitates an actors' forum, which brings together government sector leaders and the Chamber of Commerce to oversee the fair distribution of essential food products. While the administration offers incentives to boost food production and market operations, it lacks a long-term strategy to drive innovation in consumer behaviour change. Structural limitations, such as inadequate staffing in key sector offices and the absence of a dedicated food and nutrition coordination body, further hinder effective governance. Instead of having a centralised entity overseeing food security and nutrition, responsibilities are fragmented among a few personnel, including a single nutrition focal point at health facilities and health extension workers at the community level. Furthermore, the NCD team within the health sector plays a limited role in

promoting nutrition. These gaps highlight the need for a more integrated and strategic approach to food governance at the municipal level.

3.8.2 Policy awareness in Adama

City-level food systems actors in Adama demonstrate limited familiarity with the national policymaking process. According to key informants, their engagement with national policies is superficial, as their primary focus is on cascading plans received from the regional government rather than actively contributing to policy design. Policy orientation is provided through the regional government, and city-level administrators primarily adopt directives from the region without fully understanding the broader national policy framework. The development of city-level strategies is a relatively recent initiative, with efforts currently underway to formulate an inter-sectoral development strategy that integrates multiple sectors and stakeholders. However, the absence of structured policy engagement mechanisms at the municipal level limits the city's ability to tailor policies to its specific needs and priorities.

Despite their limited awareness of national policy initiatives, city actors have established a culture of stakeholder engagement, enlisting government entities, NGOs and international organisations such as GIZ (the German agency for international cooperation), the International Labour Organization, the Centre for Private Entrepreneurs Development, and Private Sector Development. This multi-stakeholder

integration is essential for aligning local development efforts with broader policy goals. However, effective implementation at the local level requires greater awareness and institutionalisation, particularly regarding nutrition-related policies. Without a clear conceptual understanding of nutrition governance, these policies risk remaining fragmented or under-used. To bridge this gap, a dedicated mixed-method study is needed to assess the extent of policy-driven changes and their impact on the supply, consumption and trade practices of essential food commodities, particularly vegetables and fruits. A deeper understanding of these dynamics will be crucial for refining policies to enhance food security, nutrition and market efficiency at the city level.

3.8.3 Local context – challenges and barriers in vegetable production, marketing, and consumption

Adama City is a rapidly growing urban centre (estimated population of 875,000) that is actively implementing national and regional food systems policies. The city administration focuses on initiatives such as home gardening promotion, the establishment of Sunday markets, the formation of consumer cooperatives, and the facilitation of market linkages. According to city reports, more than 18,000 households have received support for vegetable production, contributing to fair-priced vegetable trading for consumers. Additionally, the administration has allocated 240 square metres of land

for a cooperative of 10 civil servants to cultivate vegetables, aiming to improve both availability and affordability.

Despite these efforts, significant structural and systemic challenges hinder the efficiency of vegetable production and distribution. The city's cooperative office reports the presence of 366 cooperatives, including 126 savings and credit cooperatives, 115 agricultural cooperatives, and 124 consumer associations. However, while 10 fruit and vegetable marketing cooperatives were initially operational, only one remains active. These cooperatives, originally intended to stabilise vegetable prices and ensure affordability, struggle to compete with informal traders due to price volatility, weak bargaining power, and regulatory inefficiencies. The price ceilings imposed by the city's trade office often fail to cover costs, making it financially unviable for cooperatives to function effectively.

A census of fruit and vegetable traders in four woredas of Adama City identified approximately 1,600 vendors, while key informant interviews estimate that more than 5,000 vegetable and fruit vendors operate in the city. These traders face a variety of constraints within the broader food system, particularly in terms of access, availability and affordability of vegetables. Production challenges include limited access to improved seeds, mechanisation and pesticides, as well as the inadequate adoption of standard quality measures and good agricultural practices. The marketing

sector also suffers from inefficiencies, including a lack of structured incentives, financial support and reliable market information. Additionally, price inflation, poor post-harvest handling, and the absence of organised storage facilities exacerbate supply chain disruptions.

Vegetable consumption in Adama is significantly impacted by rising prices, declining consumer purchasing power, and inconsistent local supply. The perishable nature of vegetables, combined with underdeveloped transport and storage infrastructure, leads to high post-harvest losses and inflated market prices. Consumers often resort to price negotiations, purchasing smaller quantities, or substituting vegetables with more affordable alternatives, such as replacing onions with carrots and cabbage. This, in turn, reduces dietary diversity and affects nutritional intake. Cultural consumption habits and limited awareness of vegetable nutritional content further constrain demand. A quick assessment and key informant interviews indicate that recent price surges – caused by inflation, decreased production, and logistical disruptions – have made vegetables increasingly unaffordable, particularly for low-income households.

The broader business environment also presents barriers to vegetable trade. Lengthy bureaucratic procedures, regulatory hurdles, and weak enforcement of food safety standards hinder market efficiency and discourage investment. Contamination risks and pesticide residues pose additional

challenges in ensuring food safety for consumers. While the city administration has introduced measures such as Sunday markets and strengthened consumer cooperatives to shorten the supply chain, these efforts remain limited in scale and impact. Key informants highlighted awareness campaigns promoting home gardening and vegetable consumption, yet there is no established coordination mechanism to align stakeholders at the city level. Strengthening multi-stakeholder engagement, improving regulatory frameworks, and addressing infrastructure deficits will be essential in fostering a more resilient and inclusive vegetable market in Adama City.

4 Discussion – food systems policy making in Ethiopia

4.1 Factors determining food systems policy process

The process for food systems policy making in Ethiopia is centralised, and agenda setting and design are typically steered by national government ministries. Depending on the policy type, approval occurs at different levels of government. Proclamations require parliamentary endorsement, sector policies are approved by the Council of Ministers, and sector-specific directives or strategies receive approval from the responsible ministry.

The factors determining the policy process vary across the four cases reviewed, as discussed in the specific case review section. While each policy document follows a distinct process, there are common determinants, particularly in agenda setting, stakeholder engagement in policy design, and implementation dynamics. Table 8 summarises the key factors influencing policy processes in these cases, comparing them to findings from empirical studies in Ghana, Malawi, South Africa, Tanzania and Zambia.

Beyond identifying determining factors at each stage, the study critically assesses the policy landscape in Ethiopia, emphasising structural and systemic influences on policy development and implementation.

4.1.1 Agenda setting

Agenda setting for food systems related policies in Ethiopia is a crucial phase in policy development, primarily led by government ministries. The process requires approval from different government institutions depending on the policy type and level. Policies such as those used as our case studies emerge in response to identified challenges within their respective policy areas.

International organisations play a significant role in shaping national agendas by advocating policy reforms and sensitising decision-makers. Strong advocacy is essential at this stage to emphasise the need for food systems transformation and mobilise stakeholders. Knowledge generation and research provide the evidence base to justify policy priorities, ensuring that policies are problem-oriented and responsive to societal needs.

A demand-driven policymaking process requires active participation from diverse stakeholders, acknowledging social, economic and environmental challenges. Norms, biases and ideological perspectives influence agenda setting by shaping

stakeholder perceptions and priorities. Effective decentralisation and clear stakeholder engagement guidelines can enhance regional and local participation in policy formulation.

Table 8 Rating of policy process determining factors

Policy process/cases	FNP	NNAFSS	EFS Vision 2030	Ethiopia Trade Policy (draft)
1. Agenda setting				
Relevant problem is identified	+	+	+	+
Focused events	+	+	+	○
Powerful advocates	+	+	+	+
2. Design				
Knowledge and research	+	+	+	+
Norms, biases, ideology and beliefs	+	+	+	+
Cost-benefit calculation	+	+	+	+
3. Adoption				
Powerful opponents versus proponents	+	+	+	+
Government veto players	+	+	+	
Propitious timing	○	○	○	
4. Implementation				
Requisite budget	+	○		
Institutional capacity	+	○		
Implementation veto player	+	+		
Commitment of policy champions	+	+		
5. Evaluation and reform				
Changing information and belief	+	+		
Changing material conditions	+	+		
Institutional shifts	○	○		

At the national level, critical issues such as severe malnutrition and Ethiopia's commitment to high-level international declarations – including the SDGs and the UNFSS – have been instrumental in prioritising nutrition in public policy discourse. High-profile events and empirical data have raised awareness about the urgency of addressing nutrition-related challenges. Advocacy and awareness-raising events and initiatives are crucial, but only sustained advocacy by powerful coalitions can put an issue on the national policy agenda.

International experiences have influenced Ethiopia's food and nutrition policies. Over the past decade, international conferences such as the Second International Conference on Nutrition (ICN2), the Scaling Up Nutrition movement and the UNFSS have guided national policy frameworks. Ethiopia has tailored these global recommendations to its local context through national platforms.

However, local governments, civil society and the private sector have limited influence in Ethiopia's policy landscape. The national government and donor community largely drive the agenda-setting process. Historically, political structures have restricted the role of non-state actors in shaping policy priorities. The ruling political party remains the dominant agenda setter at national and regional levels.

To enhance policy inclusivity, mechanisms for meaningful engagement of non-state actors and decentralisation must be strengthened. Creating opportunities

for participation, dialogue and capacity-building initiatives can improve their ability to influence policy priorities, content and narratives. The fragmented nature of the private sector and the absence of independent civil society actors at the grassroots level further limit their impact.

Donor agencies and international NGOs are better positioned to influence policy agendas due to their knowledge base, financial capacity, and advocacy networks. These actors actively lobby and provide evidence-based recommendations that shape food systems and nutrition policies. Data-driven research, through combination of political economy or power analysis, and robust advocacy could pave the way for stronger engagement and action from the wider community.

4.1.2 Policy design

Policy formulation is shaped by various driving forces across domains. Food system challenges are generally addressed as long-term development priorities and there is little to no integration of immediate emergency responses in food systems policy processes. Many developing countries draw on international guidelines in designing their food systems related policies. Ethiopia exhibits this approach, with national knowledge and research, societal norms, ideological stances, and cost-benefit considerations influencing how international guidelines are tailored to the country context.

In some East African countries, agricultural input subsidy modalities are shaped by ideological perspectives on market

fairness and efficiency. In contrast, policies facilitating provision of micronutrient supplements and food fortification are less contested and typically informed by global best practices and empirical cost-benefit analysis. Policymakers' views on the role of the state versus market-based solutions significantly shape policy options.

Ethiopia's policy design process reflects a cautious approach toward market-based interventions. While there is growing recognition of the role of market actors, historical ideological influences, low trust in private sector, inadequate infrastructure, limited financial access, and weak business support services hinder private sector engagement. Policy design remains dominated by government, limiting the contributions of non-state actors. The private sector operates in silos with minimal collaboration across industries, affecting the feasibility of market-driven solutions. These challenges indicate that, as with agenda setting, the policy design process has been heavily dependent on the government, limiting the engagement and contributions of non-state actors.

4.1.3 Policy adoption

Decisions to adopt new policies depend on two primary factors: the relative power of proponents and opponents, and the agreement of government veto players. Veto players – individuals or collective actors – must agree for a proposed policy change to occur. Ministries, the president, the prime minister, and legislative actors can act as veto players. The relevant players depend on the policy domain. If

the finance ministry opposes a policy, supporters may need stronger allies or a readiness to compromise. When veto players are also policy advocates, adoption prospects increase. Understanding the relative power of advocates versus opponents is critical.

In Ethiopia, these factors were crucial in most cases, with powerful opponents and proponents, along with government veto players, being significant in all reviewed policies. Policies promoted by line ministries with full power at the ministerial and parliamentary levels face easier adoption. Policies initiated at higher government levels, such as the prime minister's office, are quickly adopted.

After the presentation of the draft policy, if it is a proclamation or a policy under the mandate of the parliament, the respective permanent committee under the parliament reviews the draft and conducts a public hearing. Any amendments are then incorporated, and the approval process proceeds with voting. Otherwise, based on the policy mandate level, the Council of Ministers or the respective ministry management team reviews and endorses it with the required agreed changes.

In the past decades, policies promoted by line ministries with the full power of the leading party at the ministerial and parliamentary levels are usually easily adopted. Policies initiated at higher government levels, such as the Prime Minister's office, are also quickly adopted. The EFS vision, for example, was adopted at a high level of government offices and received strong attention at the Council

of Ministers, with a commitment to integrating and mainstreaming actions in respective offices' regular plans and staffing. However, not all policies see such swift adoption. The national trade policy, drafted years ago, remains unapproved, facing criticism for its limited content on food systems elements. Propitious timing was not a notable factor in any of the reviewed cases, underscoring the importance of aligning advocacy efforts with strategic opportunities for policy change. An analysis of the winners and losers of such policies could help answer the question on which policies get promoted and why.

4.1.4 Policy implementation

Effective policy implementation hinges on three key factors: budgetary resources, institutional delivery capacity, and the commitment of policy champions. In Ethiopia, both the FNP and the NNAFSS encountered significant challenges related to financial constraints and institutional capacity. The presence of committed policy champions and the influence of veto players shaped the extent to which these policies advanced beyond the planning stage. Similar challenges are observed globally, where budget limitations and weak implementation capacity often drive reforms, particularly in agricultural input subsidy programmes. In contrast, micronutrient supplementation policies tend to face fewer obstacles, as they are integrated into health systems with established delivery mechanisms. Fortification policies, however, present additional complexities, as they rely on

private-sector participation, consumer financing, and robust monitoring and compliance systems.

Key informants emphasised that policy formulation is not the primary hurdle: the real challenge lies in execution.

While the country has a strong track record of developing policies, successful implementation requires both technical and administrative capabilities.

Technical factors include education, specialised skills, and infrastructure, while administrative capacity depends on institutional structures, delegation of authority and coordination mechanisms. Policies that involve multiple sectors – such as health, education and agriculture – require effective intergovernmental coordination to prevent fragmentation. Transparency and accountability mechanisms, such as performance contracts and citizen scorecards, play a crucial role in reinforcing policy execution.

At the federal level, ministries such as the MoA and MoH have established focal points and recruited experts to oversee policy implementation. While these efforts contribute to policy continuity, delays in resource allocation and budgetary limitations continue to impede progress. Policy champions – whether high-ranking bureaucrats or political leaders – help sustain momentum, but frequent leadership turnover disrupts implementation. Additional challenges include mandate competition, overlapping initiatives, insufficient funding at various administrative levels, and the need to incentivise technical expertise within government institutions.

An analysis of four key policy cases reveals that none were fully implemented as originally envisioned. The NNAFSS builds upon an earlier phase that struggled with execution due to financial and institutional limitations. Similarly, the FNP initiated regional implementation structures but has since been overshadowed by shifting priorities, particularly the focus on the EFS vision. As of 2024, the Trade Policy remains unendorsed, further highlighting delays in policy progression. Beyond resource and capacity constraints, effective policy implementation in Ethiopia also depends on clear communication, leadership stability and efficient public expenditure management. Additional barriers identified across food systems policies include sectoral mandate competition, fragmented initiatives, and weak incentives for technical capacity development. Addressing these structural challenges will be crucial for translating well-designed policies into meaningful and sustained impact.

4.1.5 Evaluation and reform

Policies are frequently refined or completely overhauled in response to the evolving beliefs of veto players, shifting financial landscapes, and lessons from prior implementation. Increased funding – whether from national resource revenues or foreign investment – can sustain policies, while donor commitments to technical and financial support often accelerate revisions. In Ethiopia, both the FNP and the NNAFSS have undergone revisions based on lessons learned, external experiences, and donor-backed initiatives. The FNP's revisions drew from past strategic shortcomings and

international best practices, while donor and NGO support provided the necessary financial and technical backing to move forward with these changes.

An evaluation of the first phase of the NNAFSS was conducted and presented to key stakeholders, generating feedback that shaped the next phase. Unlike in other countries, where institutional restructuring accounts for about one-third of policy reforms, Ethiopia's policy changes were largely driven by new information, evolving beliefs, and changing material conditions, rather than shifts in institutional structures.

International development partners play a pivotal role in policy evolution. In countries such as Ghana, Malawi, South Africa, Tanzania, and Zambia, donors have financed scientific research, facilitated high-level discussions, and provided direct budgetary and technical support for policy implementation. In Ethiopia, donors have similarly influenced all major food and nutrition policies, though their level of engagement varies across cases.

Veto players – whether government officials, political leaders, or influential stakeholders – can shift their positions based on new evidence, exposure visits, shifts in public opinion, or advocacy efforts. Internal party dynamics, negotiated compromises, and external shocks (such as economic crises or natural disasters) can also prompt policy reconsideration. In the case of the NNAFSS, revisions followed a review of the initial phase. The new strategy incorporated emerging themes such as

food systems transformation, climate-smart agriculture, and the growing challenge of obesity. Additionally, it emphasised regional variations, detailed implementation planning, dedicated nutrition budgets, and enhanced resource mobilisation to ensure more effective execution.

Ethiopia's policy refinements illustrate the dynamic interplay between evidence, financial resources, and political decision-making. However, the absence of institutional shifts suggests that while policies evolve, the structural constraints to implementation remain largely unchanged.

Development partners, including donors, UN agencies and NGOs, play a significant role by either providing technical and financial support or shaping policy direction based on their interests.

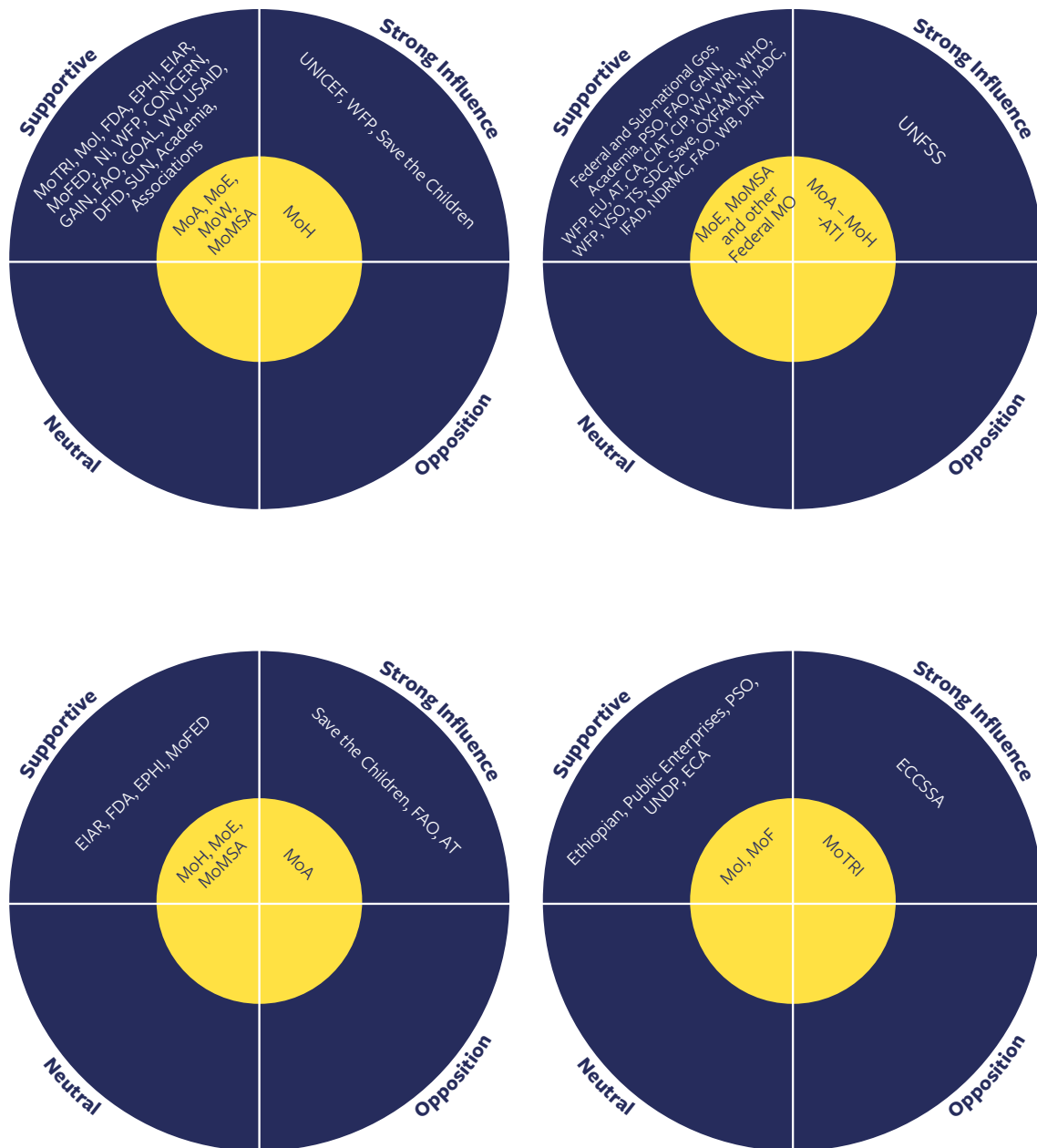
However, opposition voices are largely absent, either due to a lack of structured representation or the centralised nature of Ethiopia's governance, which consolidates decision-making power within a dominant political entity. The absence of dissenting perspectives raises concerns about whether policies genuinely reflect diverse stakeholder needs or are simply state-driven initiatives.

4.2 Stakeholders' influence

As indicated in the matrix, stakeholder engagement in Ethiopia's food systems policymaking has been inconsistent, varying across different policy cases.

The EFS vision process, driven largely by international influence, has seen broader multi-stakeholder participation; in contrast, other policy processes have been more restricted, often limited to validation workshops with select stakeholders. Across all cases, engagement from the private sector, local governments, civil society and vulnerable communities remains minimal, despite some improvements in recent policy developments.

Figure 14 shows that government ministries exert the strongest influence over policy formulation, leading processes that align with their core mandates.

Figure 14 Level of stakeholder influence in selected cases

While some policies gain momentum during drafting and adoption, implementation remains a persistent challenge. According to KII observations, even well-developed policies stall due to weak institutional capacity, inadequate financial resources, and infrastructure constraints (Gebremichael, 2021). Poor

coordination among stakeholders and limited access to reliable data further hinder evidence-based decision-making, underscoring the need for stronger collaboration and robust data systems to ensure policies translate into tangible outcomes.

Despite its potential to drive innovation and efficiency, Ethiopia's socialist legacy has fostered a deep-seated scepticism toward private enterprise, often perceiving it as self-serving and corrupt. This distrust, coupled with a governance culture that prioritises state-led development, has marginalised private actors and civil society CSOs. Government and international development partners frequently fail to recognise their value, leading to either their exclusion or only superficial engagement in key policy discussions. The prevailing sentiment within government institutions suggests that neither the private sector nor CSOs contribute meaningfully, reinforcing their peripheral role in shaping national policies.

Structural and political barriers to decentralisation further restrict inclusive participation of local governments and cities. The highly centralised policymaking process leaves little room for regional stakeholders, while a rigid, slow-learning bureaucracy fosters a closed-door approach to decision-making. With limited commitment to incorporating local organisations, many policies are top-down, externally driven, detached from ground realities, and fail to align with the needs of a broader stakeholder base, including local populations and citizens.

The lack of trust and transparency further discourages engagement. Policies are frequently seen as symbolic rather than enforceable, limiting public confidence in the policy process. Many stakeholders regard policy documents as mere formalities, deterring any serious demand for private sector participation. Public

awareness and ownership of national policies remain low, reducing calls for inclusivity in decision-making. Operational and financial constraints exacerbate the problem. The absence of institutionalised frameworks outlining how and to what extent the non-state actors and local governments should participate leaves engagement largely at the discretion of actors traditionally dominant in policy processes. The rushed nature of policy development, often dictated by short timeframes and political interests, prevents meaningful consultation. In many cases, a small technical group composed of government agencies and international development partners drives policy formulation, sidelining other voices. Furthermore, limited government resources hinder multi-stakeholder engagement, while the high cost of policy implementation discourages the participation of organisations lacking financial capacity.

Ethiopia's policymaking landscape remains government-centric, with minimal involvement from non-state actors. Overcoming historical scepticism, institutional rigidity and resource constraints is essential to fostering a more inclusive, transparent, and participatory policy environment. Institutionalising clear engagement mechanisms, strengthening coordination, and addressing financial barriers will be critical to ensuring that policies are not only well-conceived but also implemented effectively.

4.3 Indicative theory of change

Transforming food systems to be more inclusive, health-enhancing, and environmentally sustainable is a complex and politically sensitive undertaking. Traditional governance structures in Ethiopia have often produced fragmented policies and excluded stakeholders, particularly local governments, the private sector and CSOs. Effective policy transformation requires integrated governance that balances accountability, inclusivity and adaptability across multiple levels. A shift towards culturally embedded, reflexive governance is essential to navigate trade-offs, foster synergies and ensure that policies are both effective and responsive.

Drawing on experiences from countries such as Cambodia, Guatemala, Côte d'Ivoire, and the Pacific Island nations (Annex 5), successful food systems reforms have emphasised multi-sectoral collaboration, participatory decision-making, shared narratives, and data-driven policymaking. Ethiopia can benefit from these lessons by fostering an inclusive policy environment that actively engages all stakeholders. However, inclusive policy processes strongly depend on the incentives for the elites to share decision making power and resources. Figure 15 presents a framework that outlines a structured approach to policy reform aimed at improving nutrition, health and sustainability. The framework underscores the need for multi-level governance, collective action, and stakeholder engagement, ensuring that policies effectively shape the food supply, food

environment and consumer behaviour. Key considerations – steering, inclusivity, reflexivity, equity and power dynamics – must be integrated into all stages of policy formulation and execution. Strengthening multi-sectoral coordination, empowering non-state actors, improving policy implementation, enhancing accountability, fostering local governance autonomy, promoting innovation, and adopting long-term strategic planning are critical to reinforcing existing food systems initiatives.

Figure 15 Theory of Change

4.3.1 Reinforcement at the agenda-setting stage

To create a more inclusive policy landscape, a fundamental cultural shift is required in how the contributions of the local governments, private sector and CSOs are perceived. Historical biases and distrust toward these actors must be addressed through institutionalised frameworks that outline their roles in policymaking. Establishing clear engagement guidelines will ensure consistent stakeholder inclusion. Additionally, financial mechanisms such as grants, subsidies and incentives can support their meaningful participation. Capacity-building initiatives, including training programmes and technical assistance, will further enable these actors to engage effectively.

4.3.2 Strengthening the design stage

The policy design phase must emphasise transparency, inclusivity and long-term planning. Engaging both state and non-state actors ensures that policies reflect diverse perspectives and address real challenges. To enhance policy effectiveness, cost-benefit analyses and research-driven decision-making should be prioritised. Shifting from short-term reactive policymaking to long-term strategic planning allows for more thorough consultation and stakeholder participation. A well-defined policy design and implementation framework should specify the roles and responsibilities of all actors, with built-in monitoring, evaluation and feedback mechanisms to ensure accountability.

4.3.3 Enhancing policy adoption

Once policies are developed, their adoption depends on strong political commitment and advocacy. Policy champions must lead efforts to secure approval, while holding dialogues with potential veto players who may obstruct progress. Engaging donors and development partners can provide crucial technical and financial support, helping to overcome bureaucratic inertia and ensuring policies move from approval to implementation.

dynamic engagement with stakeholders will create a governance ecosystem that supports both policy continuity and adaptation.

The specific measures required to reinforce Ethiopia's food systems policymaking process are further elaborated in the Recommendations section of this report.

4.3.4 Strengthening policy implementation

The transition from policy adoption to execution remains a critical gap in Ethiopia's food systems governance. Implementation success depends on adequate budgetary resources, institutional capacity and high levels of collective action. Federal and local governments must ensure that institutions are equipped with the financial and human resources needed to carry out policy initiatives effectively. A learning-based implementation approach – where policies are continuously evaluated and adjusted based on feedback, data, and evolving challenges – is essential. Transparent communication and inclusive decision-making will help build trust among stakeholders, reinforcing their commitment to implementation. Ensuring that policies are problem-oriented rather than supply-driven will further enhance their relevance and effectiveness. Strengthening accountability mechanisms, fostering innovation, and maintaining

5 Conclusion

Food system policies in Ethiopia are shaped by a combination of historical crises, ideological frameworks, and domestic and international pressures and agendas. While high-profile events and strong advocacy have shaped key policies such as the FNP and the EFS Vision 2030, the process remains largely driven by government and donors. Local government, civil society and private sector engagement continues to be marginal, constrained by historical distrust, centralised decision-making and financial limitations.

Policy formulation is shaped by international guidelines, research and ideological perspectives, yet deep-seated scepticism toward market-based solutions persists. Despite a growing recognition of the need for private sector participation, weak private sector capacity has reinforced a preference for state-led interventions. The adoption of policies is often dictated by political power dynamics, with decisions influenced by the alignment of key government actors. Policies proposed by line ministries or higher government bodies generally advance more smoothly, while those lacking strong institutional backing face significant hurdles.

Implementation remains a persistent challenge due to budget constraints, weak institutional capacity, and inefficiencies in resource allocation. The commitment of policy champions and improved intergovernmental coordination are

critical to overcoming these barriers. Policies such as the FNP have encountered delays, highlighting the need for stronger accountability mechanisms and more effective policy execution strategies. Continuous learning and adaptation are essential for policy refinement, often influenced by shifts in political priorities, financial resources and donor involvement. External support plays a key role in sustaining initiatives like the NSAS, underscoring the importance of long-term strategic planning.

A fundamental shortcoming of Ethiopia's policy process lies in its exclusionary nature. The lack of trust in the private sector, under-representation of civil society, limited financial resources, and centralised governance structures restrict meaningful participation by non-state actors. Addressing these systemic constraints requires a deliberate effort to create an enabling environment for inclusive policymaking. Governance structures must evolve to accommodate diverse perspectives, ensuring policies are both contextually relevant and widely supported. In this regard, learning from international best practices – such as the multi-sectoral approaches adopted by Cambodia, Guatemala and Côte d'Ivoire – can offer valuable insights for Ethiopia's food systems reform.

Transforming food systems into inclusive, health-enhancing and environmentally sustainable structures requires integrated governance approaches that balance

effectiveness with accountability.

Traditional governance models have struggled to manage the complexity of food systems, leading to fragmented policies and the marginalisation of key stakeholders. To overcome these limitations, there is a need to build a coalition of actors with the power, influence and capabilities to make it work. Governance must become more reflexive, capable of addressing trade-offs, and committed to fostering collaboration among diverse actors.

Granting local governments greater autonomy in policy implementation can enhance both ownership and responsiveness to local needs. Developing clear guidelines and frameworks for stakeholder engagement is crucial for addressing the historical exclusion of the private sector and civil society. Ethiopia's future food systems policies must prioritise inclusivity, data-driven decision-making and cross-sectoral collaboration to ensure their long-term sustainability and impact.

The indicative Theory of Change provides a structured framework for policy reform, emphasising multi-level governance, collective action and broad stakeholder engagement. The ultimate objective remains the improvement of national nutrition and health outcomes through systemic policy interventions that enhance food supply, improve food environments and encourage healthier consumer behaviour. Achieving this goal will require robust multi-sectoral coordination, strengthened accountability mechanisms, empowerment of non-state actors, and

the promotion of innovative, long-term strategies that reflect the evolving realities of Ethiopia's food systems.

6 Policy recommendations

The following recommendations point to ways to strengthen multi-level food systems governance and enhance access to healthy diets in Ethiopia.

Enhancing multi-sectoral coordination is essential for effective food systems governance.

Establishing a formal multi-sectoral coordination body, such as a National Food Systems Council, should be mandated by law to institutionalise its role in aligning policies and addressing systemic challenges. This council must include representatives from key government ministries, private sector actors, CSOs and development partners, ensuring their decisions influence policy and implementation. Coordination efforts should extend beyond the national level by mandating regional and municipal food systems councils, including in cities like Adama, to localise policy objectives. To address resource constraints, the government should create a dedicated funding mechanism to support multi-sectoral engagement, ensuring financial sustainability for coordination efforts at all levels. High-level political commitment, financial and human resources and clear accountability mechanism are the pre-requisites for success of a coordination body.

Empowering non-state and municipality actors in the policy formulation process requires a structured mechanism for their engagement.

The government should establish legally binding consultation

frameworks that require the inclusion of private sector entities, farmer cooperatives, consumer groups and civil society in policy discussions. Regular stakeholder forums should be formalised as part of policy cycles, with clear mandates for reviewing and influencing policy design and implementation. Strengthening the capacity of local authorities through knowledge sharing and training programmes on food policy analysis, advocacy and negotiation skills will enable them to engage effectively. Additionally, a public-private dialogue platform should be institutionalised at local and national levels to ensure that businesses and civil society contribute to shaping food systems policies in a sustained manner.

Improving policy implementation capacity necessitates targeted investment in government institutions and human capital development.

A national capacity-building programme should be designed to train government officials, particularly those at the regional and municipal levels, on critical areas such as nutrition-sensitive agriculture, budget management and intergovernmental coordination. This programme should combine in-person workshops with digital learning platforms to ensure scalability. Additionally, implementation units should be embedded within local governments, ensuring that policy directives translate into concrete actions at the grassroots level. Establishing performance-based incentive mechanisms for implementing

agencies, tied to clear targets on food security and nutrition outcomes, will further enhance policy implementation.

Strengthening accountability mechanisms is critical to ensuring effective food systems policies. The introduction of performance contracts for key government institutions with clear deliverables on food and nutrition security, coupled with periodic performance evaluations, will enhance institutional accountability. Citizen engagement should be formalised through the use of citizen scorecards and social audits that allow communities to provide direct feedback on service delivery. Establishing an independent body responsible for monitoring, evaluation and adaptive learning, mandated to review, assess and adjust food systems policies and report directly to parliament, will help institutionalise transparency and oversight.

Promoting local governance autonomy is necessary to create context-specific food systems solutions. Regional and municipal governments should be granted greater decision-making power to design and implement food security programmes that align with their specific needs. This requires a structured devolution of financial and technical resources, ensuring that local governments have the capacity to lead policy execution. Establishing a results-based financing model, where funds are allocated based on demonstrated progress in improving nutrition and food security outcomes, will strengthen local ownership. Adama City, as a growing urban centre, could be considered to pilot this model by

integrating food systems planning into its municipal development strategy, ensuring a coordinated approach to urban food security.

Fostering innovation and developing long-term strategies is necessary to build a resilient food system. Urban agriculture initiatives such as rooftop farming, hydroponics and community gardens should be integrated into municipal planning frameworks to increase local food production. Governments at all levels should launch large-scale behaviour change campaigns promoting healthy diets, leveraging schools, workplaces and digital platforms to shift consumer preferences towards vegetable-rich diets. Building on existing initiatives like Adama's Sunday markets, municipal authorities should expand infrastructure that supports affordable, fresh produce markets, reducing reliance on long supply chains that drive up food costs.

To enhance food systems policy cohesion and minimise trade-offs, the government must prioritise access to nutritious foods by creating direct incentives for vegetable production, including subsidies for smallholder farmers and streamlined access to markets. Market infrastructure must be upgraded to reduce post-harvest losses and improve cold storage facilities, ensuring year-round vegetable availability. Nutrition-sensitive trade policies should be integrated into broader agricultural strategies to ensure food systems policies do not unintentionally favour staple crops at the expense of more diverse, nutrient-rich foods. Educational programmes and

community-based interventions should be expanded to shift dietary patterns, ensuring that increased availability of vegetables translates into higher consumption. Strengthening regulatory frameworks on food quality and pricing will further ensure that nutritious foods remain affordable and accessible.

In summary, for policies to enable access to affordable healthy diet in Ethiopia, there is a need to shift from fragmented interventions to a systemic approach that integrates multi-sectoral governance, empowers diverse stakeholders, strengthens implementation capacity, enhances accountability, promotes local governance autonomy, and fosters long-term innovation. Ensuring that food systems policies are evidence-based, financially sustainable and inclusive of all actors – especially local governments and private sector entities – will be critical in achieving lasting improvements in food security and nutrition. By addressing these areas in a structured and actionable manner, Ethiopia can build a more effective, inclusive and resilient food system, with Adama City serving as a model for urban food systems transformation.

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Appendix 1 Ranking matrix used to select food systems policy

Policy segment representation: Ensuring coverage across key policy domains related to food systems:

- Segment 1: food and nutrition – consumption – social protection.
- Segment 2: agricultural and food production.
- Segment 3: trading, investment, and finance.

Policy status: Only active policies were considered. Policies were categorised as:

- Active (1) – Included in the selection process
- Non-active (2) – Excluded

Evaluation criteria and scoring: each policy document was assessed and rated based on the following dimensions: coverage, comprehensiveness and representativeness:

- Coverage entire food systems – rated 5.
- Coverage of production, consumption, and trading – rated 4.
- Coverage of only two segments – rated 3.
- Coverage of one segment – rated 2.
- Very limited coverage – rated 1.

Policy design and planning level:

- National policy – rated 5.
- National strategy – rated 4.
- National proclamation – rated 3.
- National ministry directive – rated 2.
- National programme – rated 1.

Range of stakeholders' engagement:

- Very wide stakeholders including private sector, vulnerable groups, development partners, and academia – rated 5.
- Missing vulnerable groups or private sector – rated 4.
- Limited engagement from key stakeholders – rated 3.
- Government entity and affiliated academia only – rated 2.
- Government only – rated 1.

Policy coherence and alignment with other relevant policies):

- Strongly aligned with at least 3 relevant policies – rated 5.
- Well-aligned with at least 2 relevant policies – rated 4.
- Somehow aligned and references at least one relevant policy – rated 3.
- No direct link to other policies – rated 2.
- Contradiction with other relevant policies – rated 1.

Budget and programme-support:

- Large-scale government and donor funded programmes (in hundred millions) – rated 5.
- Medium-scale donors and government funded projects and programme – rated 4.
- Small-scale projects funded by government and development partners – rated 3.
- Regular government budget allocation – rated 2.
- No explicit budget – rated 1.

Leading organisation and implementation capacity:

- Led by Led by the Prime Minister’s Office or a major multi-sector agency – rated 5.
- Led by key ministries with dedicated staff and structure (e.g., MoA, MoH) – rated 4.
- Led by an agency with limited structure and staff – rated 3.
- Led by a department within a large organisation – rated 2.
- Led by a department within a small organisation – rated 1.

Relevance to vegetable sector:

- Directly prioritises vegetable production, marketing, or consumption – rated 5.
- Explicitly mentions vegetables – rated 4.
- Indirectly mentions vegetables – rated 3.
- Assumed to include vegetables under broader definition – rated 2.
- Not related to vegetables sector – rated 1.

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Policy document	Segment	Active or Not	Coverage/Comprehensiveness and Representativeness (Double weight)	Policy Level (5-1)	Range of stakeholders engagement (5-1)	Policy Coherence	Budget/program supported (5-1)	Leading organization - structure, leadership and staff (5-1)	Relevance for Vegetable (5-1)	Total Score	Ranking Summary	Proposed/Selected
National Food and Nutrition Strategy 2021	1	✓	10	4	4	5	5	5	5	38	1 st candidate for Seg. 1	
Food & Nutrition Policy of Ethiopia, 2018	1	✓	10	5	4	5	5	5	3	37	2 nd candidate for Seg. 1	Case selected as an example of integrated approach to FSN (Food Security and Nutrition) policies
National Nutrition program-II (NNP-II) 2016	1	✗	8	1	3	4	5	5	5	31		
National Nutrition Strategy 2008	1	✗	8	2	3	4	5	5	4	31		
Seqota declaration 2015	1	✓	6	1	4	5	5	4	5	30		
National Nutrition program-I (NNP-I) 2008/9	1	✗	8	1	3	4	5	5	4	30		
EFS Transformation Vision 2030	1	✓	8	4	3	5	3	4	3	30		
National Policy and Strategy on Disaster Risk Management, 2013	1	✓	4	5	3	4	5	4	3	28		
National Social Protection Policy of Ethiopia, 2012	1	✓	4	5	3	4	5	4	3	28		
National Food Safety and Quality Strategy-For Primary Agricultural Produce, 2024 (2024-2030)	1	✓	4	4	3	4	3	4	5	27		

Appendix 2 Food system policy chronology

Year	Overall food and nutrition	Agriculture (horticulture and others)	Disaster risk and social protection	Trade and investment and financials	Food safety and health	Environment
2008	National Nutrition Strategy National Nutrition Program-I (NNP-I)					
2010		Agricultural growth program I (AGP I) (2010–2015)				
2011						Climate-Resilient Green Economy (CRGE) Strategy, 2011
2012			National Social Protection Policy			
2013			National Policy and Strategy on Disaster Risk Management			
2015	Seqota Declaration	AGP II – 2015–2020				
2016	National Nutrition program-II (NNP-II)	Nutrition-sensitive Agricultural Strategic Plan, 2016				
2017		Agricultural Extension Strategy, 2017				
2018	Food and Nutrition Policy, 2018					

Year	Overall food and nutrition	Agriculture (horticulture and others)	Disaster risk and social protection	Trade and investment and financials	Food safety and health	Environment
2019					Food and Medicine Administration Proclamation	Green Legacy, 2019
2020				Investment Proclamation, 1180 – 2020	National Strategic Action Plan for NCDs	
2021	National Food and Nutrition Strategy Seqota Declaration -Roadmap for Expansion and Scale-up	Ten-Year Agricultural Development Plan The Horticulture Policy Horticulture Roadmap		National Financial Inclusion Strategy (NFIS)		
2022				Investment Incentives Regulation No. 517-2022		
2023		Ethiopia Food Systems Resilience Program + FtF				
2024	National Food Safety and Quality Strategy- For Primary Agricultural Produce, 2024 (2024-2030)	National Nutrition Sensitive Agri-Food Systems Strategy (2024-2030) Postharvest Management Strategy, 2024 (2024-2030)		Ethiopian Trade Policy (draft) Fruit and Vegetable Marketing Directive (draft)		

Appendix 3 Food system policy documents scan note

Policy document	Focus on food system and overall	Vegetable-related actions
Food and Nutrition Policy of Ethiopia, 2018	<p>With a mission to create a food and nutrition self-reliant Ethiopia, seven main policy directions were set, which include:</p> <ul style="list-style-type: none"> i. Ensuring availability, accessibility, and utilisation of diversified, safe, and nutritious foods in a sustainable way. This includes enhancing agricultural production and productivity, improving market linkages and social protection, and strengthening climate resilience and adaptation strategies. ii. Ensuring the safety and quality of foods from farm to table. This involves establishing and implementing a legal framework and appropriate technologies for food safety and quality control, and ensuring the safety of foods prepared and served by various catering establishments. iii. Improving postharvest management of agricultural food products. This entails developing and implementing food-processing technology training centres, establishing small, medium, and large-scale agro-processing industries and infrastructures, and improving value addition and postharvest management. iv. Ensuring optimum nutrition at all stages of life. This requires implementing nutrition-specific and nutrition-sensitive interventions, such as promoting optimal breastfeeding and complementary feeding, food fortification, nutrition-smart health services, social and behavioural change communication, and addressing the needs of vulnerable groups. v. Provisioning of timely and appropriate food and nutrition emergency response for natural and manmade disasters. This involves developing and strengthening early warning, preparedness, timely and proper response and rehabilitation systems for food and nutrition emergencies. vi. Strengthening food and nutrition communication. This goal aims to improve the nutrition literacy of individuals, families, and communities along the food value chain, and to use various communication approaches and channels to create nutrition model families and communities. 	No direct or explicit actions are mentioned on vegetables, but most policy directions encompass them.

Policy document	Focus on food system and overall	Vegetable-related actions
	<p>vii. Establishing and strengthening food and nutrition governance. This objective encompasses creating a functional governance body for coordinating and integrating food and nutrition policy-implementing sectors, ensuring sustainable and adequate financing, building institutional and human resource capacities, and enhancing evidence generation for decision-making, learning, and accountability.</p>	
National Food and Nutrition Strategy, 2021	<p>The document was developed based on the FNP (2018). The strategy has 13 objectives, each with specific strategic directions, initiatives, actions, and key performance indicators. The objectives cover various aspects of food and nutrition security, such as food availability, accessibility, utilisation, sustainability, food safety and quality, post-harvest management, nutrition throughout the life cycle, nutrition emergency, WASH, nutrition literacy, governance, sustainable financing, communication, evidence generation, and institutional capacity. The strategy outlines institutional frameworks and coordination mechanisms.</p>	<p>There are direct mentions of vegetables in the strategy initiatives and result areas across various strategic objectives. For example, the Strategy aims to improve the availability and accessibility of adequate, diversified, safe, and nutritious foods, including vegetables, for all citizens. It emphasises the importance of production and consumption of nutrient-dense crops, which include vegetables, to ensure a healthy diet for the population. The promotion of agro-ecology-based farming systems includes the cultivation of nutrient-dense crops such as vegetables. The Strategy also encourages strengthening fruit and vegetable gardening at the urban, peri-urban, and farmstead levels to enhance food security and nutrition. It also advocates for the protection of natural resources to enhance the production of vegetables, fruit, animal feed, and fodder. It highlights the need to increase the consumption of vegetables as part of a diversified diet to combat malnutrition and improve the nutritional status of the population. The document also discusses strategies to ensure the availability of vegetables through sustainable agricultural practices and improved post-harvest management.</p>
Seqota Declaration (SD) – Roadmap for Expansion and Scale-up Phases 2021 – 2030	<p>The SD is a commitment by the Ethiopian government to end stunting in children under two by 2030, with a roadmap for expansion and scale-up phases from 2021 to 2030. The strategic objectives focused on high-impact nutrition-specific and nutrition-smart interventions with eight objectives on improving access to food, water, sanitation, healthcare, social protection, women empowerment, and governance for stunting reduction. There are four investment pillars categorising interventions as lifting, backstopping, leveraging, and enabling, to guide investment and implementation strategies. It also emphasises multisectoral collaboration, evidence-based interventions, and sustainable financing for achieving the goals of the Declaration.</p>	<p>Vegetables are considered a vital component of the strategies to improve nutrition and reduce stunting in children under two years by 2030 in Ethiopia. For example, ‘Result 1.1.4. Improved production and consumption of nutrient rich fruits and vegetables’ highlights the importance of improved production and consumption of nutrient-rich horticultural produce, including vegetables, to enhance household food and nutrition security. It mentions innovative homestead gardening as a mechanism to increase agricultural productivity, which includes cultivation of vegetables. Also, the document underscores the low level of consumption of diverse foods in Ethiopian households, and recommends vegetables as one of the seven food groups for enhancing household diet diversity.</p>
National Nutrition Program-II (NNP-II) 2016	<p>The NNP focuses on improving nutritional status across various demographics, including adolescents, women of reproductive age, infants, young children, and those affected by communicable and non-communicable diseases. Interventions envisaged in NNP II include breastfeeding, complementary feeding, WASH,</p>	<p>Vegetables are mentioned specifically in several initiatives like encouraging households to engage in homestead gardening to increase consumption of vegetables; promotion of technologies for post-harvest processing and preparation to ensure nutritious and diverse vegetables; supporting the development of bio-fortified</p>

Policy document	Focus on food system and overall	Vegetable-related actions
	<p>and management of acute malnutrition. It also details the strategic objectives and initiatives for improving the nutritional status of women, children, and those affected by communicable and non-communicable diseases. The Program also emphasises the importance of coordination among different sectors and stakeholders, including government ministries and bodies, to effectively implement nutrition-sensitive interventions. It underscores the need for accountability in achieving nutrition goals and targets set by the government, suggesting the establishment of governance structures in ministries and agencies.</p>	<p>crops and vegetables to increase access for farmers; improving household-level knowledge and practice about dietary diversity, including the consumption of vegetables; improving food handling, storage, and transportation of fruit, vegetables, and other crops; as well as improving market linkages for fruit and vegetable produce.</p>
<p>Nutrition-Sensitive Agricultural Strategic Plan, 2016</p>	<p>The Strategic Plan aims to serve as a guide for the agriculture sector to apply nutrition-sensitive approaches and contribute to the improvement of nutritional status in Ethiopia. It aims to reduce child and woman undernutrition by increasing the availability, access, and consumption of diverse, nutritious, and safe food in Ethiopia. It focuses on integrating nutrition into agricultural policies and strengthening institutional structures and capacities for implementing nutrition-sensitive agriculture. The Strategy promotes the production of diversified and nutrient-dense foods, including fruit, vegetables, and animal-source foods, to improve dietary diversity. Recognising the role of women in improving nutrition outcomes, women empowerment and gender equality is listed among key components. Establishing strong coordination within the agriculture sector and with other stakeholders is also essential to implement the strategy effectively.</p>	<p>The strategy aims to promote the production of improved fruit and vegetables at household, community, and school levels using social and behavioural change communication materials and tools. Support for the establishment of fruit and vegetable nurseries and demonstration sites at farmer-training centres and with model farmers. Encouragement of backyard gardening among households to increase the production and consumption of vegetables. Promotion of urban gardening in zonal capitals to enhance access to vegetables for urban households.</p>
<p>National Nutrition Sensitive Agri-Food Systems Strategy (2024 – 2030)</p>	<p>The Strategy aims to improve food and nutrition security in Ethiopia by ensuring the availability, accessibility, and quality of diverse, safe, and nutritious foods. The six strategic objectives include ensuring the availability of diverse foods, enhancing community resilience, and empowering women and vulnerable groups. The Strategy details objectives to promote urban and peri-urban agriculture, improve poultry and small ruminant production, and encourage the use of crop and animal insurance services. Additionally, it emphasises the promotion of nutritious and insufficiently produced indigenous foods, aiming to increase their yield and develop production packages. Furthermore, it seeks to increase the proportion of households consuming homestead products, promote underutilised nutrient-dense food sources, develop standardised cooking guidelines with the local context, organising capacity-building events on diversified healthy diet preparation and consumption. The strategy also includes detailed targets for establishing nutrition demonstration centres, promoting diversified healthy diets through media, and strengthening consumption</p>	<p>The strategy seeks to increase the production of diversified nutrient-dense crops, including leafy vegetables, to improve dietary diversity and address malnutrition. The initiatives and core activities include implementation of GAP, introduction and promotion of technologies for production and post-harvest handling of vegetables, to ensure safe and healthy foods. Establishment and strengthening of horticultural nurseries and demonstration sites to promote the cultivation of nutrient-dense vegetables are also among the objectives of the Strategy.</p>

Policy document	Focus on food system and overall	Vegetable-related actions
	<p>in public and private feeding institutions. It emphasises the role of collaboration across various sectors, including the Ministry of Agriculture (MoA), public health institutions, academia, NGOs, and research centres.</p>	
<p>Ten-Year Agricultural Development Plan, 2021</p>	<p>The agricultural policy is linked with the Food and Nutrition Policy (FNP). The policy recognises three of the seven policy directions of FNP that are directly under the Ministry of Agriculture. The policy is aimed at mainstreaming the implementation areas of the food system (interventions) in the regular activities of the concerned agricultural directors, the diet of the citizens, particularly, the composition of food; ensuring that the frequency of meals meet international standards, especially in rural areas with limited access to food; expanding the diversity of production, using different communication methods to convey messages about food system-oriented agriculture; increasing awareness in the society and bringing about a change in behaviour. Based on the experience of the Food and Nutrition Coordinating Office established at the federal level, setting up a structure that coordinates the implementation of food and nutrition in regions, and hierarchical agricultural bureaus and offices, enabling the agriculture sector to be a source of new knowledge by creating an intensive monitoring and evaluation system for food system-oriented agricultural activities. Through formulating a food system-oriented agriculture program, the Ministry of Agriculture takes the lead in organising food system-oriented activities, which would include establishing model food-oriented agriculture training centres in various agro-ecological regions, promoting technology and skill transfer, and incorporating food system-oriented agriculture into primary and secondary schools. Additionally, support is to be provided for vocational training and input provision to establish demonstration centres. Continuous support and monitoring are essential until food system planning and oversight become routine in the agricultural sector. Efforts will also focus on strengthening coordination capacity for food-based activities and increasing the availability of improved technologies.</p>	<p>Among those in the vegetable sector are the following, technology generation and multiplication technology, strengthening the delivery of protection, improved supply of inputs, production/propagation of improved seeds, putting an incentive system for import tax exemption of vegetable seeds, ensure effective export oriented horticultural produce in the country. Specific in the agricultural extension includes: (i) preparation of Small Horticulture Development Package, (ii) training of trainers and farmers, (iii) conducting a demonstration, and (iv) field support and supervision.</p>
<p>Agricultural Extension Strategy, 2017</p>	<p>The Extension Strategy has a goal of contributing substantially to enhancing food and nutrition security, poverty reduction and wealth creation in the country through adoption and adaptation of improved technologies by delivering market-oriented, demand-driven, and pluralistic extension services. The nine pillars included in the strategy are:</p> <p>-Strengthening farmer-training centres through active participation of community and capacity building.</p>	<p>Vegetables are included in the interventions aimed at promoting nutrition-sensitive extension services and enhancing women's socio-economic empowerment.</p>

- Enhancing agricultural knowledge and information system.
- Enhancing client-oriented and multi actor's advisory extension services.
- Facilitating market linkages and enhancing value chains development.
- Gender, youth, and nutrition mainstreaming.
- Enhancing environmentally sustainable agricultural practices.
- Enhancing institutional arrangements, coordination and linkages among key agricultural development partners.
- Human resources development and utilisation for effective extension service delivery.
- Establishing strong and dynamic results-based monitoring, evaluation and learning for continuous improvement of extension services delivery.

Agricultural
Growth
Program (AGP
I (2010–2015;
AGP II –
2015–2022)

The development objective of the Agricultural Growth Program II for Ethiopia was to increase agricultural productivity and commercialisation of smallholder farmers. The Program is comprised of five components: (i) agricultural public support services to increase access to public agricultural services for smallholder farmers, (ii) agricultural research to increase the supply of demand-driven agricultural technologies, (iii) small-scale irrigation to increase the access to and efficient utilisation of irrigation water by smallholder farmers, (iv) agriculture marketing and value chains to commercialise smallholder farmers through increased access to input and output markets, and (v) project management, capacity building, and monitoring and evaluation (M and E). AGP-II has benefitted more than 2.5 million people, 36.9% of whom are women. As part of the government's commitment to promote nutrition-sensitive agriculture (NSA), reduce stunting and achieve the country's development goals, AGP was promoting the use of NSA as well as gender and climate-smart agriculture. The Program promotes dietary diversity through nutrient-dense crops, livestock products, post-harvest processing and handling, social behavioural change communication, food safety, and child and maternal health.

Environment
Policy –
Climate-Resilient
Green
Economy
(CRGE)
Strategy, 2011

The CRGE strategy envisions transitioning to green economy that balances economic growth with environmental sustainability. It aims to create jobs, reduce poverty, and improve livelihoods while addressing climate change challenges. It has three main components, (i)

CRGE strategy doesn't explicitly use the term healthy or vegetable diets production and consumption but the strategy recognises the importance of sustainable agricultural practices that include diversification of production for both food security and climate resilience. The

Policy document	Focus on food system and overall	Vegetable-related actions
	mitigation: reducing greenhouse gas emissions through sustainable practices in various sectors such as agriculture, forestry, energy, and transport; (ii) adaptation: building resilience to climate impacts, especially for vulnerable communities; (iii) sustainable development: integrating climate action with broader development goals. The strategy involves collaboration with various stakeholders, including government agencies, civil society, private sector, and development partners.	actions mention enhancing agricultural productivity, promoting climate-smart practices, and improving soil health, which eventually contribute to food system resilience.
Green Legacy Initiative (GLI), 2019	The GLI is among the programs implemented in the country and is rooted in a vision of building a green and climate-resilient Ethiopia. The Initiative was launched in June 2019, which is ‘a national go green campaign, endeavouring to raise the public’s awareness about Ethiopia’s frightening environmental degradation and, educate society on the importance of adopting green behaviour’. A target of planting 20 billion seedlings within four years was set. By the fourth year, as per the government report, Ethiopia has succeeded in planting 25 billion seedlings by mobilising more than 20 million citizens throughout the nation. The Initiative indirectly contributes to food security by planting valuable seedlings such as avocados, mangoes, apples, and papayas.	Not directly related to vegetables.
National Policy and Strategy on Disaster Risk Management, 2013	<p>The National Policy and Strategy on Disaster Risk Management in Ethiopia (2013) is a comprehensive framework designed to address disaster risk reduction, building on the updated National Policy on Disaster Prevention and Management from 1993. The Policy aims to enhance disaster prevention, and preparedness capacities by reducing vulnerabilities and building resilience. The ultimate goal is to create a disaster-resilient Ethiopia.</p> <p>Policy directions and strategies cover:</p> <ul style="list-style-type: none"> -Establishing a comprehensive disaster risk management system to manage disaster risks. -Early warning and disaster assessment by providing timely information for informed responses. -Creating an official disaster declaration system to ensure efficient disaster declarations. -Setting up a decentralised disaster risk management system through empowerment of local authorities. -Mainstreaming disaster risk management by integrating it into sectoral institutions. -Enhancing resource mobilisation procedure by identifying potential sources. -Improving the information management and 	The policy’s holistic approach to disaster risk management indirectly impacts nutrition and agricultural production.

Policy document	Focus on food system and overall	Vegetable-related actions
	<p>communication system for effective data sharing.</p> <p>-Advancing international cooperation through global collaboration.</p> <p>-Strengthening implementation capacity.</p> <p>-Addressing cross-cutting issues by responding to challenges.</p>	
National Social Protection Policy of Ethiopia, 2012	The Policy serves as a comprehensive framework for coordinated actions to safeguard citizens from economic and social deprivation. It recognises that social protection enhances the effectiveness and efficiency of investments in various sectors, including agriculture, health, education, and water. It focuses on four main areas: (i) social safety net, (ii) livelihood and employment schemes, (iii) social insurance, and (iv) addressing inequalities of basic services.	Nutrition is considered part of the basic services.
Ethiopian Trade Policy, 2024 (draft)	<p>The Policy defined country's direction in the following ten areas:</p> <ul style="list-style-type: none"> -Domestic trade and distribution. -Favourable macroeconomic environment for the business system. -Investment and trade. -Reducing business costs and increasing international competitiveness. -Expansion of market access. -Diversification of exports. -Participation in the global value chains. -Digital business. -Consumer protection and fair trade. -Cross-cutting issues. 	No specific mentions of vegetables.
Fruit and Vegetable Marketing Directive, 2024 (draft)	The draft directive determines transaction locations and levels, proposes market centres, transport mechanisms, and competency requirements for market players, defines responsibility of market players and stakeholders' roles.	The directive is specific to horticulture and includes fruit, vegetables, and root crops.
Investment Proclamation, 2020	Lists incentives in various sectors, such as tax exemptions from one to six years, depending on the investment type, as well as capital goods import tax exemptions for priority investment areas.	Horticulture is among the sectors to benefit from the Proclamation.
Investment Directive, 2022	Provides details for investment incentives.	Horticulture is among the qualifying sectors.
National Financial Inclusion Strategy (NFIS) II, 2021-2025	Neither food systems nor vegetables are explicitly mentioned in the Strategy. The document primarily focuses on broader financial access and services, specifically it aims to enhance financial inclusion across the country and envisions a financially inclusive Ethiopia, where all citizens have access to and actively use a range of quality financial services. The ultimate goal is to create an enabling environment that	While the Strategy doesn't explicitly dedicate a section specifically to food systems and agriculture, it recognises the importance of reaching rural populations. There is, however, a specific target to scale national agricultural insurance. Initiatives cover agricultural finance, including loans, savings, and insurance products. The Strategy aims to enhance access to financial services for smallholder farmers, agribusinesses,

Policy document	Focus on food system and overall	Vegetable-related actions
	<p>mainstreams financial inclusion, fosters innovation, and ensures the participation of underserved segments. The Strategy prioritises four key areas: (i) digital financial inclusion, (ii) financial inclusion for underserved areas, (iii) financial inclusion of women, and (iv) promotion of Sharia-compliant financial products. The strategy outlines a robust governance framework needed for implementation.</p>	<p>and rural cooperatives. It also emphasises the role of digital financial services in improving agricultural productivity and resilience. It encourages the adoption of digital payment systems, mobile banking, and other technology-driven solutions to facilitate transactions in the agricultural sector recognising the need to enhance financial literacy among rural communities, including farmers. Capacity-building programmes seek to empower farmers to make informed financial decisions, manage risks, and access appropriate financial services.</p>
Food and Medicine Administration Proclamation No. 1112/2019	<p>The Proclamation establishes regulations, among others, to safeguard public health from unsafe food and medicine, aims to control health hazards, and ensure food safety. There are points that highlight the importance of food safety regulation and compliance with standards in the Ethiopian food systems policy. As indicated in the Proclamation, the executive organ or regional health regulator may request third-party conformity assessment to ensure food safety. Locally produced food must bear the applicable mark and have a certificate indicating compliance with mandatory standards. Individuals must register with the executive organ or regional health regulator prior to engaging in food trade activities. It mandates the establishment of a list of permissible food additives by an authorised body to ensure compliance with Ethiopian standards. It also stipulates that infant formula must adhere to Ethiopian quality and safety standards, be non-GMO, not exposed to radiation during production, and packaged in non-plastic materials with clear protein source labelling. Highlights the requirement for registration and market placement of food supplements, with safety assessments varying based on the type of potential health risks, and health claims. Details the obligation for fortified foods to meet Ethiopian standards, with specific vitamins, minerals, or essential nutrients allowed for fortification purposes and proper labelling.</p>	<p>Vegetables are specifically mentioned in the definition of a follow-up formula ('a food product of animal or plant origin and industrially formulated in accordance with an appropriate standard for feeding infants and young children from six months up to three years of age') as one of the food products.</p>
National Strategic Action Plan for the Prevention and Control of Non-Communicable Diseases (NCDs), 2020	<p>The Strategic Plan covers the period from 2020 to 2025 and aims to address major health challenges related to cardiovascular diseases, diabetes mellitus, chronic kidney diseases, and chronic respiratory diseases. The main directions and initiatives include: (i) strengthening the national response through policy, governance, leadership, and coordination; (ii) intensifying health promotion and disease prevention that encompass healthy diets promotion and encourage physical activity; (iii) comprehensive and integrated clinical interventions for NCDs and their risk factors; and (iv) research, surveillance, monitoring, and evaluation.</p>	<p>Low vegetable and fruit consumption is considered one of the risk factors and efforts are targeted at reducing insufficient fruit and vegetable consumption in persons aged 15 years and older. Promoting Healthy Diet strategic initiative proposes regular fruit and vegetable consumption interventions.</p>

Appendix 4 Review of lessons learned from other countries

In recent years, several countries have made significant progress in developing more inclusive and systemic food systems policy processes. Cambodia, the Pacific Island countries, Guatemala, and Côte d'Ivoire have each adopted unique strategies that emphasise multi-sectoral collaboration, participatory approaches, shared narratives, and data-driven policymaking, resulting in more effective and sustainable food systems. These countries have demonstrated that involving diverse stakeholders and sectors is essential for effective food systems policy processes. By fostering multi-sectoral collaboration, adopting participatory approaches, building shared narratives, and utilising data-driven policymaking, they have made significant steps towards achieving sustainable and inclusive food systems.

The experiences of these countries provide valuable lessons for Ethiopia, where stakeholder engagement has already begun. Ethiopia can benefit by ensuring that its food systems policies are inclusive and systemic, by involving a wide range of stakeholders, utilising data effectively, and fostering collaboration across sectors to achieve Sustainable Development Goals (SDGs). Key lessons for Ethiopia's food systems policy process include integrating diverse stakeholder inputs, emphasising multi-sectoral collaboration for holistic solutions, adopting data-driven approaches to inform policy decisions, and building shared narratives to unify efforts towards common goals.

Lessons from Cambodia

Cambodia's Council of Agricultural and Rural Development (CARD) shifted from a sectoral to a multi-sectoral perspective in 2019, involving various stakeholders such as government ministries, academia, consumers, youth, and the private sector. Dr Sok Silo, Secretary-General of CARD, stated 'we needed to understand the problem correctly and identify what was preventing policy efforts from achieving greater impact.' This shift was supported by the FIRST initiative, which facilitated 30 dialogue events with almost 2,000 participants in 2021. The twin-track approach under the 2019–2023 National Strategy for Food Security and Nutrition (NSFSN) separated sector-led contributions from joint priorities, emphasising good governance and effective coordination.

Previously, policy development involved different ministries proposing activities without clear responsibilities or shared priorities. The twin-track approach separated sector-led contributions from joint priorities, such as healthy diets, food value chains, and food safety. CARD formed a multi-stakeholder and multi-sectoral task force to operationalise these priorities and provided overall coordination. This approach emphasised good governance, effective coordination, and collaboration among various stakeholders, including the private sector and civil society. By building relationships across agencies and ministries, CARD aimed to achieve collective progress towards the SDG targets for 2030.

The paradigm shift from silos to systems thinking was supported by a shared narrative on broad systems change. FIRST played a crucial role in fostering this understanding by bringing together diverse perspectives and unpacking complex concepts. Building a shared narrative in Khmer, the national language, was essential to ensure that technical jargon did not obscure the meaning for general audiences. Identifying and working with champions who could convene decision-makers was also vital. These champions helped build trust and drive the food systems agenda. Leveraging opportunities like the 2021 UN Food Systems Summit, FIRST facilitated inclusive dialogues that brought together over 2,000 participants from various sectors. These dialogues helped Cambodia gain recognition as a leader in food systems transformation and strengthened the country's commitment to inclusive and sustainable food security.

Lessons from the Pacific Island countries

In the Pacific Island countries, the FIRST Programme played a crucial role in helping these nations to understand and address the connections between agrifood systems, climate change, consumer choices, food prices, and non-communicable diseases (NCDs). Itziar Gonzalez, a former FIRST Policy Officer, noted, 'FIRST provided continuity and systematisation to ongoing processes, offering concrete tools for decision-makers'. The Programme engaged government agencies and civil society in Fiji and Samoa, supporting the design, implementation, and monitoring of interventions. Partnerships with entities like the Consumer Council of Fiji and the Pacific Island Food Revolution (PIFR) promoted sustainable food practices and empowered individuals to make positive changes. The Fiji Agriculture Census of 2020 incorporated age and gender-disaggregated data, increasing the visibility of women and youth in agrifood systems.

By challenging prevailing paradigms and introducing new topics and evidence, FIRST facilitated inclusive dialogues among various stakeholders. The programme emphasised the need for different sectors to incorporate nutrition into their objectives and work collaboratively to ensure food security, environmental

sustainability, and equitable livelihoods. This approach required data-driven policymaking, inclusive dialogues, adequate funding, and coordinated implementation across multiple government ministries and agencies.

FIRST expanded the dialogue on agrifood systems transformation by including diverse voices from civil society and academia, particularly through national dialogues leading up to the 2021 UN Food Systems Summit. For instance, FIRST collaborated with the Consumer Council of Fiji to organise a panel discussion on engaging universities, consumer groups, and the media in the dialogue. Another notable partnership was with the Pacific Island Food Revolution (PIFR), a reality TV show promoting traditional dishes made from local products. PIFR, which featured an inclusive cast and garnered significant public attention, helped reconnect people with their cultural heritage and promoted sustainable food practices. The show also used social media to disseminate information about food's impact on health and the environment, empowering individuals to make positive changes.

The COVID-19 pandemic underscored the vulnerability of local food systems in the Pacific Island countries and highlighted the need for a broader understanding of food systems' role in malnutrition. This shift in narrative was supported by the collection and analysis of relevant data, which informed policy dialogues. FIRST worked with the Fiji Agriculture Census 2020 to incorporate age and gender-disaggregated data, increasing the visibility of women and youth in agrifood systems. Additionally, FIRST partnered with academia to conduct food systems assessments and supported the monitoring and evaluation efforts of Fiji's Ministry of Agriculture. By focusing on managing trade-offs and promoting a balance between agro-industrial and agro-ecological approaches, FIRST helped policymakers make informed decisions that consider economic, social, and environmental outcomes.

Lessons from Guatemala

Guatemala has used a comprehensive legal and institutional framework to facilitate multi-sectoral coordination, involving bodies like CONASAN and SESAN. Over 50 multi-stakeholder meetings were held to update the National Food Security and Nutrition Policy (POLSAN). The FIRST Programme conducted governance and political economy assessments to understand and address policy design and implementation gaps. The updated POLSAN (2022–2037) promotes sustainable food systems and includes cross-cutting actions on climate change, wages, and food advertising. FIRST also strengthened civil society's participation in decision-making, supporting the development of management and advocacy instruments and facilitating dialogues to formulate the Strategic Plan for 2023–2027.

Steering the transformation of agrifood systems towards sustainability in Guatemala requires collective action from a diverse range of stakeholders, including government, civil society, producers, consumers, the private sector, and academia. Each group has distinct interests and varying degrees of power, influencing whose views are prioritised. Political agendas often shape investment priorities in agrifood systems, making it crucial to understand the governance and political economy contexts to drive change effectively.

Guatemala's food security and nutrition challenges are addressed through a comprehensive legal, regulatory, and programmatic framework. This includes the 2005 Law on the National Food Security and Nutrition System (SINASAN) and the 2006 National Food Security and Nutrition Policy (POLSAN). The governance system comprises of four main bodies: the National Council for Food Security and Nutrition (CONASAN), the Secretariat for Food Security and Nutrition (SESAN), the Consultation and Social Participation Body (INCOPAS), and the Group of Supporting Institutions (GIA). These bodies facilitate multi-sectoral and multi-stakeholder coordination at various levels.

Despite a robust institutional structure, Guatemala faces significant obstacles in translating commitments into tangible outcomes. Challenges include political instability, high personnel turnover, unequal decision-making power, weak dialogue between policymakers and implementers, and resource constraints at the local level. Addressing these issues requires navigating power asymmetries, building trust, and fostering genuine dialogue among all actors.

The FIRST Programme, active in Guatemala from 2017 to 2022, played a pivotal role in addressing food security and nutrition challenges. It conducted governance and political economy assessments to understand why progress was slow despite high-level commitments. FIRST helped the government identify gaps in policy design and implementation, and provided technical inputs from various perspectives, including gender, institutional development, and nutrition. The programme emphasised the need for a multi-sectoral, multi-stakeholder approach to address structural poverty-related issues.

Lessons from Côte d'Ivoire

In Côte d'Ivoire, the FIRST Programme supported the transformation of the cocoa sector by addressing interconnected issues like poverty, child labour, income distribution, climate change, food insecurity, and environmental degradation through multi-stakeholder discussions and policy formulation. The National Sustainable Cocoa Strategy (SNCD) was developed to improve producer revenue, combat child labour, and prevent deforestation, involving over 100 stakeholder

consultations. This strategy marked a shift from a top-down approach to a more inclusive method, focusing on empowering family farmers and ensuring environmental sustainability.

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