

EDITORIAL

In southern Somalia Gedo, Bay, Bakol and Hiran regions remain the key areas of concern in terms of food insecurity. Recent reports all highlight that an "Average to Good" *Deyr* season will be needed to enable many poorer households to sustain their livelihoods and retain essential assets in the longer-term. The same applies in Northern and Central parts of the country but the problems relate more to livestock issues and the continuing livestock export embargo rather than to crop performance.

The question that remains is "What should be done in terms of emergency preparedness and in planning mid to longer-term interventions, if the forthcoming *Deyr* season is bad?"

The call to strengthen the relief food pipeline by WFP and CARE, represents the main initiative at this stage. But what are the alternatives to a food solution with regard to this potential problem? It may be helpful to know that the FSAU-HEFA reports can provide a much broader analysis than simply supporting relief food estimates*. Recent assessments have not looked at the *Gu* harvest in isolation. A harvest assessment only helps to identify the possible contribution from crop (largely staple cereals) to the household needs but we need to consider all sources of household income and expenditure. Many vulnerable groups are now seen to be more vulnerable to changes in the market and other factors impacting on their purchasing power (as well as their income) rather than crop performance. Some households are vulnerable because they are 'labour poor', others will only cope through accessing additional self-employment and other labour opportunities. Many will need to adapt normal expenditure and consumption patterns to enable essential purchases. Within any economy, different groups are exposed to different risks for different reasons and these are just a few examples. The FSAU analysis, and the FSAU team members, can provide more insight into the issues being faced at household level. Enquiries from implementing partners and agencies are welcomed.

* It is important to recognise that the Household FOOD GAP figure is not the same as the RELIEF FOOD REQUIREMENT.

HIGHLIGHTS

FSAU ASSESSMENT IN SOUTHERN SOMALIA : FSAU held a workshop in Baidoa to analyse data collected during the August Harvest and predicts a Food Gap (shortfall in access to food at household level) close to 22,000 MT, affecting 400,000 people, over the next twelve months in Southern Somalia. This excludes estimates made by CARE and WFP for IDP's and vulnerable urban populations. The FSAU figure is based on a poor *Deyr* Harvest and prices increasing significantly over the same period. If security deteriorates over the next twelve months, the size of the food gap is likely to increase further. A FSAU Focus will be issued during September with more in depth analysis.

FSAU FOOD SECURITY ASSESSMENT IN NORTH SOMALIA : FSAU held an August workshop in Hargeisa examining food security in the north for the period up to March/April 2002. FSAU found that food security for the poor in many food economy groups will become borderline. The poorer of the poor may not remain food secure, particularly if the *Deyr* rains are inadequate. Where several negative factors combine (drought, high food prices, low livestock prices, disease, trade blockages etc), due to seasonal fluctuations or unforeseen events poor households' food security may quickly deteriorate. However, no widespread emergency conditions are expected unless the *Deyr* rains fail seriously. The nature of likely food insecurity in the coming months will be small-scale and localised.

AREAS OF CONCERN : Bay and Bakol. (S. Somalia) Coping strategies are already stretched in Bay and Bakol. Additional constraints (eg flooding or conflict) on coping strategies could cause up to 50% of the population to experience a 40% deficit over the next twelve months. This is equivalent to the very poor in the region having no food for five continuous months. The food security situation of the urban population groups in **Gedo** (S. Somalia) are of concern and immediate needs are increasing. Many factors have contributed to this, among them low stocks and high dependence on the sorghum belt production. **Sool** region (N. Somalia) has received the lowest rainfall, than any time in the last six years. In the neighbouring Warder district of Ethiopia, rains have also failed, generating large scale and unseasonal livestock migration into Sool and Togdheer regions, increasing pressure on water and pasture. The situation in the eastern part of the **Haud of Togdheer** is deteriorating. The normal coping strategies for very poor are under pressure and they are not able to migrate out.

LOCAL CEREAL PRICES: sorghum prices did not decrease in most rain-fed areas after a very poor *Gu* 2001 sorghum harvest. In the irrigated areas of Middle and Lower Shabelle, maize prices dropped by 30-50% during August (good harvest).

Highlights from FSAU 'NUTRITION UPDATE'

Concern over the effects of food insecurity on particular vulnerable groups in southern Somalia has prompted organisations involved in supplementary feeding programmes to *expand and extend* their current interventions. This strategy is supported by members of the SACB Nutrition Working Group.

Hargeisa nutrition survey Despite the fact that global malnutrition rates of around 15% (< -2 Z-scores) are accepted as commonplace in southern Somalia and receive relatively little attention, the recent survey results in the 'returnees' camps in and around Hargeisa which show the same level have been the centre of much discussion. Preliminary reports have been published in the last issue of the 'Nutrition Update'. The full report is expected before the end of September.

Gedo Region Organisations working throughout Gedo region have expressed concern over the generally worsening conditions there. CARE has

observed a high proportion of malnourished children during recent screening exercises and ACF activities in both therapeutic and supplementary feeding centres in Luuq District continue to expand. Rates of improvement among programme beneficiaries are lower than expected, often an indication of more widespread problems related to food availability and access in the general population.

Nutrition surveys The planned nutrition assessment in Sool region of Somaliland was cancelled due to security related issues. A nutrition survey in EIDere, Galgadud has been completed. Preliminary results available in September issue of 'Nutrition Update'. During October, surveys are planned in Rabdhure (Bakol) and Qansaxdheere (Bay).

For further details on these and other issues related to nutrition in Somalia, see 'Nutrition Update', August and September issues or contact noreen.prendiville@fsau.or.ke

FSAU AUGUST ASSESSMENT IN S. SOMALIA

WORKSHOP IN BAIDOA

In August FSAU held a workshop in Baidoa to assess each Food Economy Zone in the South of Somalia and analyse what percentage of that zone in terms of population would have difficulty accessing food at household level following the poor *Gu* rains and the August harvest. A food gap was subsequently identified by the FSAU for each Food Economy Zone. These food gap figures are based on a scenario (identified below) over the next twelve months.

The analysis focused on the household level and took into account the variations in access to resources, brought about by differences in geography and wealth. Information was collected through extensive interviews with key informants and groups of villagers who represent their wealth bracket. As the analysis was carried out at household level, FSAU was also able to determine what strategies a household could adopt to cover shortfalls, as well as the cost and burden that this "coping" would place on short and long term survival. This information was incorporated into the final food gap figures.

whether the bulk of the population has or does not have access to food over the coming year. The most important assumptions are:

- ✓ Harvest from *Deyr* cropping season 35% of post-war average
- ✓ Conflict: situation does not deteriorate beyond present levels (especially in Lower & Middle Juba)
- ✓ Aim of the resulting intervention: livelihood preservation
- ✓ No significant flooding taking place along Juba and Shabelle valleys
- ✓ "Normal" trading and access routes remain open or as they are now
- ✓ Prices: "Middle" scenario, except in some cases, e.g. Gedo, where worse conditions are expected to prevail.
- ✓ Population data: based on WHO 1998 figures
- ✓ Livestock ban to continue

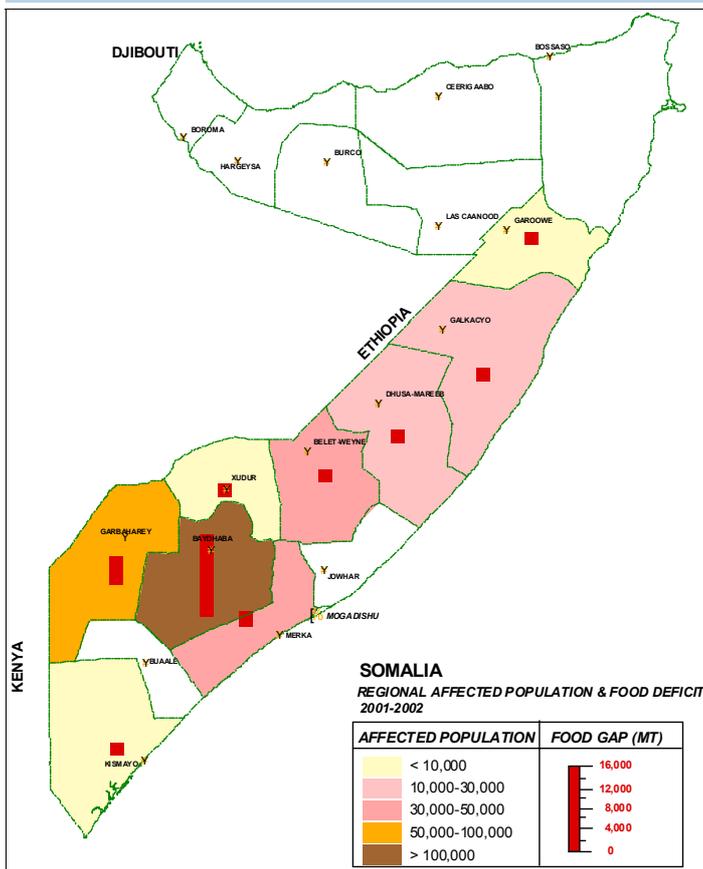
THE 'FOOD GAP' AND ITS INTERPRETATION

Overall, based on the above scenario, FSAU expects that there will be a food gap of close to 22,000 MT, affecting 400,000 people in the southern part of Somalia. This **excludes** estimates made by CARE and WFP for urban populations and IDP's.

In order to interpret the 'food gap' and to derive the actual 'food needs' from it, we need to consider what it means. It is a quantity of cereal food that will enable the majority of households to **maintain their livelihoods**, provided it is targeted with 100% accuracy and at the correct time. However, in practice it is rarely possible to target the right people at the right time. As a result most distributions will require much higher quantities than indicated in the food gap. In addition because of constraints relating to alternative non-food interventions, food aid often covers an economic group rather than addressing a purely **nutritional** need. This is when the timing of deliveries becomes crucial in order to avoid possible harmful effects ie. disincentive to future production by depressing cereal prices. Expanding supplementary feeding for households with undernourished members is one option as are food-for-work programmes, especially where these are well-planned and can provide tangible benefit in relieving other shortfalls, especially in water and sanitation or access to markets (e.g. through infrastructure). Some examples of non-food interventions that will strengthen food security are:

- ✓ Livestock certification to improve marketability
- ✓ Support for milk and dairy marketing
- ✓ For livestock keepers, interventions to improve access to veterinary inputs, while greater water availability in areas of better pasture would help maintain the condition of animals, thus raising their value.
- ✓ In areas where the staple food market supply is still quite good and the price below 1998/99 levels (in dollar terms), cash-for-work programmes may help.
- ✓ The need to keep trade and seasonal migration routes open is very important.

AFFECTED POPULATION AND HH FOOD GAP



SITUATION UNTIL THE DEYR IN S. SOMALIA

Field staff are still reporting the presence of underground food stocks in Bay and Bakol regions, although for households at the bottom of the 'poor' groups these are now depleted. This is further evidenced by the fact that sorghum is still being sourced from these two regions and truckloads are shipped weekly to Mogadishu. Apart from the 'very poor' and the structurally food-insecure groups already mentioned, it is expected that attempts will be made to recuperate from cereal production during the coming *Deyr* season (and there will be an added incentive for the 'middle' and 'better-off' wealth groups because of the rise in value of their product). This will mean opportunities for the poor from labour (in land preparation and planting etc).

SCENARIO

Predicting or forecasting food security over the coming year means constructing a scenario where assumptions are made for the future changes in each factor that is unknown. The question really is: how bad to make the scenario?

Choosing a 'best case' scenario would not be of much value as the resulting picture would create an impression that lives and livelihoods are not under threat; instead, the 'middle case' presented here highlights genuine concerns for factors that are sensitive to change and that may play a significant role in

However, if the rains are either delayed or do not come, the expectation of a poor Deyr will increase and support may be needed earlier. The exception to this is north Gedo where households have experienced three bad years in a row and where pastoralism and livestock play a greater role in livelihoods; access to income and food from animals has already diminished considerably. This is borne out by reports from the field (FSAU and CARE). In this region it is expected that food insecurity will begin right now and will deteriorate further with the projected scenario.

An important consideration in the analysis is that it focuses on the 'typical' households within a particular wealth group.

In reality each wealth group is more heterogeneous and when food security is found to be marginal it must be expected that a small percentage, say around 10-15% of households, will actually face a deficit. In addition, there are also groups of people who do not fit into the normal social or economic structures of communities represented by the current food economy analysis. Very often these are people or households who have migrated to the towns or the periphery of the towns, IDP's, marginalized groups, etc. It is recognised that these people are structurally food insecure (thus requiring ongoing support) and that they may account for the fact that malnutrition rates remain high, even during good production years.

INCREASED VULNERABILITY TO FOOD INSECURITY IN NORTHERN REGIONS OF SOMALIA

IMPACT OF LIVESTOCK BAN

The livestock ban has now been in place on Somalia for nearly one year. Somaliland, Puntland and Central regions are the areas most seriously affected. Indications are that the ban will not be lifted this year. High rates of inflation have also been affecting households for most of 2001. The implications of these factors at the macro-economic and household level are serious but, as with any shock, affect different people in different ways.

In general, household economy monitoring and analysis reveals that poor households from different Food Economy Groups (FEGs) have had sufficient options to manage the reduced income caused by the ban reasonably well over its first 6-12 months, at least in terms of maintaining minimum food needs – other food and non-food needs which affect well-being have suffered, including the quality of the diet and access to medicines. However, many of the economic and environmental circumstances that initially accompanied the ban, and mitigated its worst impact over its first 6 months, have been changing recently and are expected to make survival strategies more difficult over the coming six months and more. This is worrisome, in terms of food security, only for a minority of population – the poor and very poor population groups.

- Gu rains have been poor in most regions, except Sanag and most of Bari, threatening >
- Livestock conditions and productivity—milk for consumption and sale and marketable animals
- Crop harvest expectations for Somaliland are poor >
- Causing an upward effect on cereal prices
- The Djibouti border has been closed >
- Limiting cross border trade and exchange possibilities in Awdal region
- A ban on construction activities in urban centres (mainly Hargeisa) was imposed for 2-3 months >
- Reducing job opportunities and incomes for the urban poor

MAJOR IMPACT OF THE BAN

The main affect has been to seriously reduce household income for groups that normally sell livestock, or rely on jobs or petty trading associated with the livestock marketing system.

MAJOR MITIGATING CIRCUMSTANCES

Most households in the north normally eat imported rice as their main staple. However, due to reduced income levels and the availability of unusually cheap cereals poor households have been able to switch from rice to sorghum and/or wheat grain and in the process save 50% of normal cereal costs.

This low price of cereals has been due to the large food aid distributions in Region V (Ethiopia) that have been traded or exchanged across the border and the good sorghum stocks in Somaliland from recent good harvests.

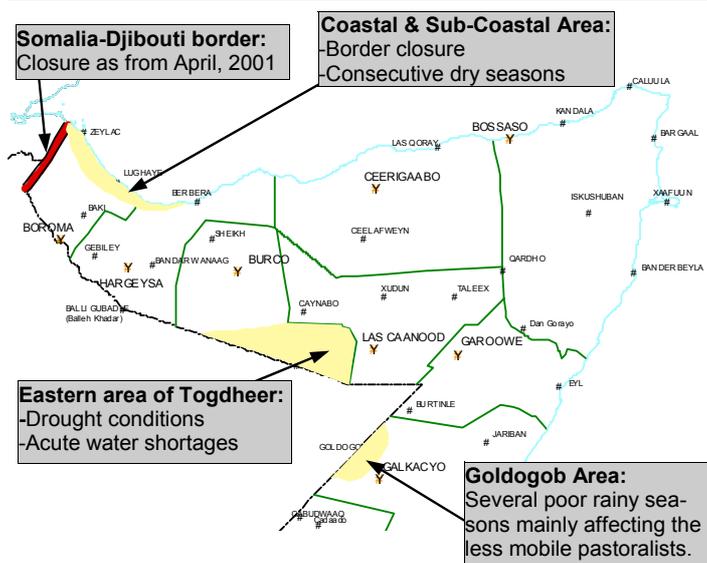
Other household strategies that have been taking place in order to supplement lost income have included:

- Collecting and producing more charcoal (and other bush products)
- Seeking more employment than normal
- Seeking more gifts than normal
- Switching milk production from consumption to sales, thereby gaining better kilocalorie terms of trade.

CHANGING CIRCUMSTANCES

From about April 2001 several events have taken place in Somaliland and Puntland that serve to exacerbate the impact of the livestock ban, in certain areas, and make the outlook in terms of food security more worrying:

PRIORITY VULNERABLE AREAS

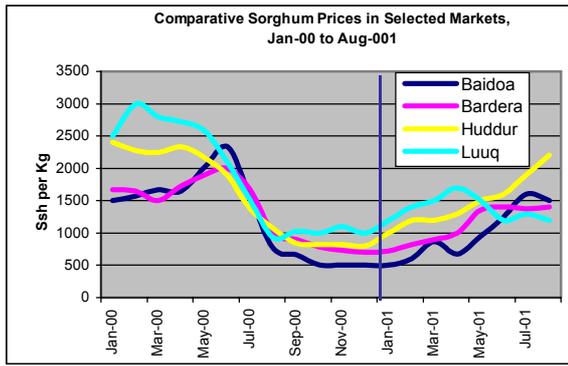


OUTLOOK

Household economy analysis for the period up to March/April 2002 suggests that food security for the poor in many food economy groups will become borderline. The poorer of the poor may not remain food secure, particularly if the Deyr rains are inadequate. Where several negative factors combine (drought, high food prices, low livestock prices, disease, trade blockages etc), due to seasonal fluctuations or unforeseen events poor households' food security may quickly deteriorate. No widespread emergency conditions are expected unless the Deyr rains fail seriously. The nature of likely food insecurity in the coming months will be small-scale and localised.

FSAU estimated the food gap for Northern Somalia (Somaliland and Puntland) during their Hargeisa workshop to be close to 6,830 MT, affecting a population of 178,400 people up to April 2002. Due to time constraints the analysis was only carried out on the most vulnerable wealth group—the poor.

POST-HARVEST SORGHUM PRICES IN SOUTHERN MARKETS

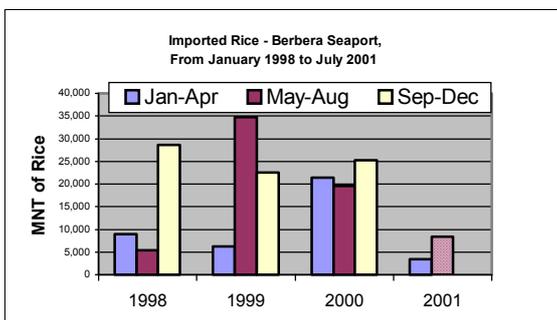
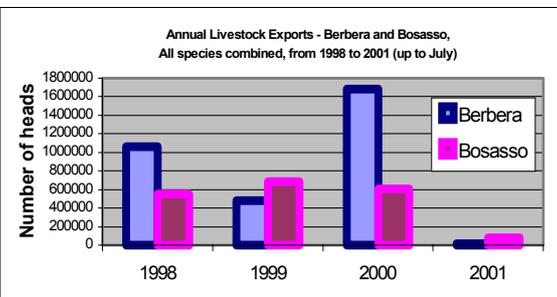


Compared to last year, **post-harvest sorghum prices** show a totally different picture this year (see graph). After the generally good **Gu 2000** production, prices dropped from relative high values to very low levels in all markets of southern Somalia. The lowest prices were then observed in **Baidoa** with 500-600 Ssh/kg. Sorghum prices gradually increased from January to July 2001. Due to the existing stocks from the previous *Gu* and the last *Deyr* seasons, the trend was moderate. In spite of early signs of poor *Gu* crop production in major rain-fed areas, sorghum was still significantly cheaper in 2001 than in 2000 until June. In the sorghum belt, prices only became slightly above last year's levels in July when it reached up to 1,700 Ssh/kg in Baidoa (Bay) and 2,000 Ssh/kg in **Huddur** (Bakool). As opposed to a normal year, and as it was foreseen, prices did not drop neither in anticipation nor immediately after the **Gu 2001** sorghum harvest (very poor production). An upward trend was even observed in **Huddur**, where the cost of the 50kg bag rose from 90,000 Ssh end of July to 120,000 Ssh end of August (the retail price went up accordingly, see

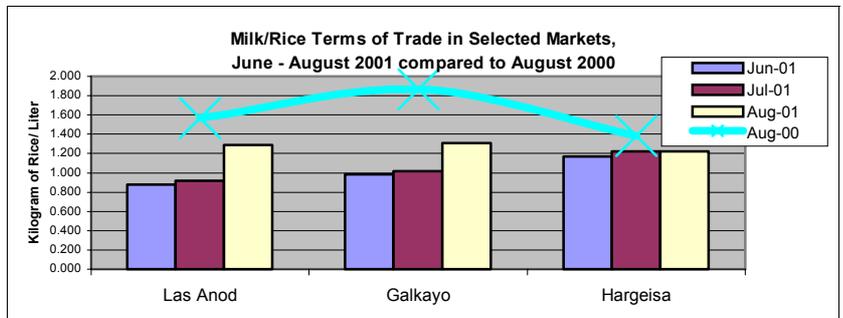
graph). In **Baidoa**, the price of the sorghum bag stabilized at 80,000 Ssh while the retail prices went slightly down from 1,700 Ssh/kg to 1,500 Ssh/kg. Expressed in Somali currency, prices doubled compared to last year at the same period in Baidoa (40,000 Ssh/bag in August 2000). However, when converted in USD, the value of one bag is similar (about 4 USD/bag). In Bardera (**south Gedo**), retail prices stabilized at 1,400-1,500 Ssh/kg and the 50kg bag was cheaper than in Baidoa: 65-70,000 Ssh. Besides the rain-fed crop failure (Bay, Bakool, Hiran, Gedo), increasing insecurity proved to be an additional burden in some areas like **northern Gedo** by hampering inflow of food commodities. However, this has not been reflected by the price trend yet (see Luuq market/ graph).

IMPORT AND EXPORT

Generally, imports increase in relation with livestock exports as the proceeds from livestock sales are usually used for the import of food and non-food items. Somalia underwent a first livestock ban from February 1998 to May 1999, which had a negative impact on livestock exports and trade activities. As shown by the chart, **rice imports** through Berbera started to recover shortly after the lifting of the ban in May 1999. **Livestock exports** were again drastically reduced after the imposition of another ban in September 2000. Export levels became insignificant: less than 100,000 heads exported through Berbera and Bossasso - all species combined - from January to July 2001 compared to about 2,300,000 heads for the whole year 2000. Rice imports were not immediately affected by the current ban (see chart). About 25,000 MT of rice were imported through Berbera between September and December 2000 (total for the year 2000 was above 66,000 MT). The slow down in imports only became noticeable since the beginning of 2001. However, trade is still going on (8,000 MT of rice were imported through Berbera in July, no data available yet for August).



MILK/CEREALS TERMS OF TRADE (TT)



In the context of the on-going livestock ban, milk sales are particularly important as an income source for pastoralists in **northern Somalia**. Up to now, and in spite of the economic implications of the livestock ban, imported food still represents a key source of expenditure (rice, sugar, pasta) for most local households (only the poorest households are shifting to local cereals). In most northern markets, one liter of camel milk was traded this month for more than one kilogram of rice. **Milk/ rice TT** were the highest in Bossasso where they reached 1.5 kg/liter in the second half of August (with the value of one liter of milk rising up to 9,000 Ssh). In Hargeisa, it stabilized at about 1.2 kg/liter (see chart). The relative improvement of the TT milk/rice from July to August observed in Las Anod, Galkayo and other markets was mainly due to scarcity of camel's milk resulting in higher prices (rice prices did not decrease from July to August). Expressed in Somali currency, milk prices are now slightly higher than last year at the same period. Lower supplies due to poor rains partly explain the actual trend (one year ago, much more milk was traded as a direct consequence of the good *Gu* 2000 rainy season and prices were particularly low). During the course of the year, income levels being threatened by the monetary inflation and the imposition of the ban, pastoralists were also forced to increase the price of their livestock products (milk prices tend to follow the cost of minimum non-food staple items like sugar and oil). However, since the ban, rice prices have increased significantly more than milk prices (40-60% for rice and 10-30% for milk). Consequently, TT milk/rice remain less favorable for camel owners when compared to last year (see chart). In **southern Somalia**, **TT camel's milk/ sorghum** widely varied from one region to another in August. One of the lowest values of TT was observed in Bakool region, which is essentially a pastoral food economy zone with camels as the predominant species: about 1kg/liter this year in Huddur, compared to 2.5kg/liter last year at the same period. Milk prices did not increase to the same extent as cereal prices and more milk than usual is supplied to the market. In Bardera (south Gedo) and Baidoa (Bay region), TT camel's milk/sorghum were well above 2 kg/liter, which is relatively close to last year's levels. As opposed to camels, cattle body condition is deteriorating significantly in all agro-pastoral areas affected by the poor *Gu* rainy season where cattle's milk production is becoming very low (availability of milk is also low due to livestock migration towards better grazing areas). Close monitoring of milk prices and milk production rates will be required in the coming months.

GU 2001 CROP PRODUCTION—FINAL FINDINGS

FSAU crop harvest field activities took place in the first half of August. The total cereal production of **southern Somalia** was estimated at about 115,000 MT, which is close to the production of 1998 (-3%). *Gu* 2001 production is well below last year's level (-45%) and below average (-36%, see table 1).

Table 1: *Gu* 2001 production estimates in southern Somalia compared to average

Crop	Gu 2001	Gu PWA	% PWA (*)
Sorghum	27,600	85,900	-68%
Maize	87,800	93,700	-6%
Total	115,400	179,600	-36%

(*) PWA: post-war average 1993-2000
Source: FSAU, FAO, FEWS.

Final figures were significantly lower than the early estimates made at establishment time (-30%). The estimation made for **maize** in L/Shabelle at establishment time had to be revised (poor conditions for rain-fed maize in the latest developmental stages). However, maize production in L/Shabelle was still close to normal (56,000 MT). The total production of maize was estimated at about 88,000 MT (close to average, see table 1). **Sorghum** harvest has been very poor in general (27,600 MT in total, down by 2/3 compared to average). The production of sorghum went down by 90% in the main producing zones. After the very good cereal production of last year in Bay, that region experienced a bad crop failure (5,400 MT of sorghum produced this year compared to 75,500 MT in the *Gu* 2000). Sorghum production was this year better in the Middle and Lower Shabelle than in the sorghum belt (close to 16,000 MT in Jowhar, Balad and W/Weyn).

HEALTH

- With no recent reports of cholera, organisations in the Health sector are expected to undertake a review of this year's outbreak and to develop plans in readiness for the coming year.
- Gedo Health Consortium has reported a serious outbreak of measles in Burdhubo. IMC has also noted increased numbers of measles cases in both adults and children in Qansaxdheere (Bay Region).
- In Bardera, Gedo Region, a high mortality from suspected malaria has prompted IMC to open a number of treatment centres for better diagnosis and management of further cases.
- Further rounds of Polio immunisation will be undertaken during September and October.

REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS >> P. 5

NW & AWDAL

Good seasonal *Karan* rains are relieving dry conditions felt as a result of the poor *Gu*. The immediate surroundings of Hargeisa and the southeast of Hargeisa are the main areas reporting poorer rains so far. These rains are expected to continue until mid-September. Livestock migration potential is therefore good, with even drier areas within reach of better pasture conditions. Soil moisture is therefore also considered good for early planted sorghum and late planted or replanted maize and sorghum. The major cereal harvest in the northwest takes place in October following the current *Karan* rains. Cereal prices are also rising, by 10-30% depending on the cereal. These price rises have to be closely monitored given the ongoing difficulties caused by the livestock ban, the border closure with Djibouti and general inflationary trends.

N-NUGAL & S-BARI

Pastoral conditions are seasonally deteriorating as the dry and windy Hagai season comes to an end and the *Deyr* rains are expected. The Nugal valley is the most overgrazed area as the rainfall during the *Gu* was light and floodwater received was limited. Livestock condition in that area is worse than in the other parts in the region. Livestock has migrated to areas of the Haud and Sool eco-zones where pasture and water is available. Elsewhere because of good distribution, (though below normal amounts of the *Gu* rains) the movement and concentration of livestock are better than normal. Therefore low density is compensating for the light rains. The availability of grass which livestock resort to in the dry season is scarce. This situation is fragile and depends on good and timely arrival of the *Deyr* rains. IDPs and urban poor are less affected by the weather but more affected by continued inflation. Their food security and nutrition status must be closely monitored.

SOOL & BUHOODLE

The poor performance of the *Gu* has had a negative impact on the majority of the regional pastoral community. Livestock productivity and body condition has declined drastically in the last month. In Nugal eco-zone, the pasture availability is a growing concern while in the *Haud* access to drinking water for both human and livestock consumption is a major problem. Water trucking in the *Haud* has increased and water prices have gone up. In Buhoodle, a high death rate is reported of small ruminants and cattle. Animal diseases of epidemic proportion are reported in most livestock congregated areas. This is due to pasture/water scarcity and drought-induced animal diseases. Up to 120 poor pastoral households have lost most of their stocks and are seeking refuge in urban centers as destitute. (Buhoodle Town). Pastoral poor in many parts of Sool region were not getting enough daily calorie in-take due to poor pastoral production, hyper inflation and reduced ability to sell animals within herds.

SANAG & TOGHDEER

Conditions for poor pastoralists remaining in the eastern areas of the *Haud* of Toghdeer are of grave concern. Localised drought conditions from the failed *Gu* rains have exacerbated the stresses felt under the livestock ban. These areas, along the border with Ethiopia, are relatively isolated, from major markets and permanent water sources. A planned rapid nutritional assessment in the area had to be cancelled due to lack of access. Abnormal livestock deaths have started to take place in the area. Other areas of Toghdeer and Sanag have much more favourable conditions, although still have much reduced income levels due to the ban. This is partly due to un-seasonal rains in the Golis mountains, which results in significant run-off water in to lowland areas. Frankincense income in Sanag and the re-opening of fishing opportunities after the monsoon season also allow good income opportunities.

BARI REGION

(Bosasso, B/Beyla and Iskushuban Districts)

Food security conditions are generally normal except some areas where there is water and pasture shortage due to very poor *Gu* rains. These include the village of Taageer and its vicinity. High concentration of livestock from neighbouring Nugal region is also putting heavy pressure on water and pasture resources in Sool and *Iyah* eco-zones, where most of the berkads are now empty. Livestock are now congregated around the permanent water sources, particularly the wells of Jeded, Rako and Dhuudo villages. The price of milk in Bosasso has increased by 50% from June, indicative of the drying conditions. Fodder has also risen by 50% from last month. Live animal prices have also fallen. Limited livestock exports to Oman and UAE have been taking place. Frankincense continues to provide a good alternative source of income. The imminent ending of the monsoon season should open up Bosasso port for increased trade and related job opportunities.

S-NUGAL & N-MUDUG

Environmental conditions are unusually harsh for the time of year. Pasture depletion and water scarcity is very worrying. Livestock condition and productivity (milk) is suffering. In the worst affected areas, particularly Galdogob district, livestock deaths are put at 10-15%, with more expected until the *Deyr* rains arrive. Water prices have at least doubled in the last month. Livestock value is poor and cereal prices are rising. Demand for jobs in urban centres is high given the difficult circumstances everywhere. Political uncertainties have also affected negatively the smooth functioning of the market. Future food security depends crucially on the good and timely arrival of the *Deyr* rains.

>> P. 6 REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS

HIRAN

Due to erratic *Gu* rains the harvest from the rainfed areas was poor and many of the irrigated fields were left as fallow (less than 84% area was harvested compared to last year). The availability of pasture is below normal in all areas. Water availability is normal at water points but is limited in the remote grazing areas due to the concentration of livestock. The camels and goats are coping but there is deterioration in the condition of the cattle. The cattle herders have already migrated out of the region in search of better pasture and water. The weather is now hot and dry. Heavy rains in Ethiopia have caused the river level to rise. High water levels can create both benefits and problems. Cereal prices are increasing because of the poor production within the region and neighbouring regions. At present people are able to cope with these price increases.

BAY

The dry weather and the poor *Gu* rains are causing the water points to dry up earlier than normal. Pasture condition is also poor, causing livestock condition and production to deteriorate. Imported commodities are continuing to rise, especially cooking oil. Bay is normally the highest production sorghum area and produces approximately 60% of the sorghum in Somalia. The inadequate rains in the area resulted in a poor harvest. This has caused sorghum prices to remain the same and usually at this time of the year (post harvest) sorghum prices would decrease. Due to the poor harvest and lack of employment opportunities in the rural areas an increased number of people are leaving in search of employment in the urban areas. This population movement is above and beyond normal coping mechanisms of labour migration.

BAKOL

The food security situation is below normal for this time of the year and there is concern for the poorer households, mainly because of a greatly reduced sorghum harvest in the Bakol high potential area. The poor sorghum harvest has resulted in less labour opportunities for the poorer households. This has resulted in increased migration by the poor into urban areas in search of employment. Cereal prices are increasing due to the reduced harvest, inflation, tax and high fuel costs. Prices remain high for imported items and remain out of reach for the poorer households. The high prices are due to the devaluation of the Somalia shilling and the road block between Mogadishu and Bakol. Cattle condition and production has deteriorated due to poor grazing conditions. However, the camels and goats are less affected by the poor pasture. Pockets of higher than normal malnutrition are emerging in some areas, particularly Rabdure.

GEDO

Drought has continued to have a negative impact on pastoral and agro-pastoral areas. Due to the poor rains there is nearly total crop failure in the rain-fed sorghum belt. Cereal prices are higher than normal which is an indication of the poor sorghum harvest. The livestock condition and production is poor and continuing to deteriorate. This has reduced demand and livestock prices have fallen. Milk yields have deteriorated and prices have risen in the northern towns. Due to the heavy rains in Ethiopia the Juba and Dawa river levels have risen dramatically and could cause problems if the heavy rain in Ethiopia continues. Because of the border closure between Kenya and Somalia, the urban dwellers on the border have lost a source of income from cross border trade activities.

COWPEA BELT

The current situation in the central region is normal with the *Hagai* windy season having started causing both pasture and water to dry out. However, within this area there are pockets which are drier than normal and stretch from *Hobio* to *Galkajo*, *Harar Dhere* to *Adado* as well as *Dusamareb* to *Cabud-waq* and *El Bur* to *Elder*. In these areas the water and pasture availability is poorer than normal and water prices in inland areas are increasing and livestock condition is deteriorating. Local cereal prices are increasing due to the reduced availability and the price of imported commodities continues to rise as the Somalia shilling devalues. This has caused many of the middle to richer wealth groups to consume locally produced cereals rather than imported foods.

JUBA VALLEY

The harvest production in this area was good and the livestock condition is also good. However, the closure of Somalia-Kenya border, the disruption of the trade link between Mogadishu and the Juba valley and the fighting in the riverine areas has had a negative impact on the food security situation. There is an increase in the number of livestock in Juba Valley because livestock has come in from Gedo where pasture and water availability is poor. This has put additional pressure on the existing water and pasture sources in Juba Valley. Employment opportunities have been disrupted because of insecurity. Crop production is poor in Hager and Afmadow district. The water shortages in Hager has caused livestock to move to Afmadow and Riverine.

LOWER SHABELLE

Food Security situation in most parts of the region are normal. Cereal availability at household level is considered normal for this time of year. However, there is concern in some of the agro-pastoral (with little or no livestock) rainfed areas such as *Afgoye*, *Bravo* and north *Qorioley* where the harvest was below normal. Cereal prices remain high so the ability of the poor wealth group in this Food Economy Group to access food could deteriorate especially if the *Deyr* rains are delayed or insufficient. Heavy rains in Ethiopia have caused the Shabelle river to rise higher than normal and there is concern that if the rain continues there will be flooding. Pasture and grazing availability is normal, although animals are concentrated earlier than normal in the riverine areas because of water scarcity in other pastoral areas. Land preparation has started in anticipation of the *Deyr* rains. In the middle of August there was evidence that cereal prices were slowly beginning to decline. The availability of agricultural jobs including harvesting, threshing and early sowing in irrigated areas has helped and self-employment activities such as the collection of bush products are continuing as normal.

MIDDLE SHABELLE

Water availability is normal in the pastoral and agro-pastoral areas. Pasture condition is below normal in the inland areas which has caused the condition of the cattle to deteriorate. Cattle have begun to migrate to the riverine areas in search of crop residue and better grazing. The coastal plains pastures are good due to *Hagai* showers. Heavy rain in Ethiopia is causing concern as the river level has risen. Market prices are decreasing because of the harvest and increased availability of cereals. Sorghum has decreased by 29% and maize by 26% Household cereal stocks remain normal for all FEG's