

EDITORIAL

The head of UNDP has recently made a clear statement that Somalia is faced with economic collapse. As Somalia enters the harsh dry *Jilaa* season, FSAU believes that the livelihoods of the **poor and most vulnerable** groups are increasingly at risk and could take a turn for the worse, early next year, as their options to access income rapidly decrease. Access to income is critical for these groups who purchase (rather than produce) **food and essential goods**.

Their coping mechanisms have become limited by the ongoing livestock import embargo and the expected **reduction in remittance** money from the diaspora. (due to the closure of Al-Barakat) Combined with the fact that the value of a day's labour is reducing and the terms of trade for livestock remain poor. Any other smaller 'shocks' experienced by these poor and vulnerable groups, (smaller shocks vary from region to region) will add to their problems, while continuing conflict will make their situation worse.

The need for economic recovery is urgent so that 'better off' and 'middle' socio-economic wealth groups can create other sources of income for poorer households, such as employment. The encouraging *Deyr* rains and the reopening of the Yemen livestock market will bring some much needed relief.

However, the current economic situation demonstrates the need to monitor **both access to income** across all wealth groups in Somalia as well as the **local food supply** and the **vital economic links** between Somalis in rural and urban settings and their contacts in the diaspora.

HIGHLIGHTS

REMITTANCES : This refers to money being sent from outside Somalia, by the Somali Diaspora, to relatives within the country and has been identified as the biggest foreign-exchange contributor to the Somali economy. Estimates suggest between 500 million to 1 billion dollars a year. Remittance money has been severely curtailed by the closure of Al-Barakat (following the September 11 terrorist attack in the USA). The country is already in the grip of food shortages and drought. FSAU believes that the reduction in remittances will further damage a household's ability to access income which is critical for survival during periods of hardship. (See Page Two)

GEDO : Gedo is now undoubtedly the region of greatest concern with virtually no rain in Belet Hawa, Dolo and Luuq. The rainfall is less than 10% of what would have been expected in a 'normal' season and little more is now expected. The food security situation is extremely poor and is likely to deteriorate over the coming months. Reports also indicate that eight-five per cent of remittance money into Gedo region came via Al-Barakat, which has been closed down.

INSECURITY IN PUNTLAND : The political situation in Puntland is currently fragile while the outcome of ongoing negotiations are awaited. The implications on food security are linked by the fact that there are now constraints on internal trading routes. While Bossaso port is active with livestock exporting, instability in Garowe has led to the closure of some livestock trading routes and the authorities in Bosasso have banned the transport of fuel to Garowe. This is likely to cause commodity prices in the region to rise. Drought assessments in Bari region have been postponed.

DEYR CROP ESTABLISHMENT IN SOUTHERN SOMALIA: After the *Gu* 2001 sorghum crop failure in Bay region, all farms had to be replanted during the *Deyr* season (no 'ratoon' cropping this year). Rainfall was well distributed in time in most parts of Bay region, particularly in the surroundings of Baidoa where *Deyr* rains have been slightly above average. Crops are now well established, with the exception of localized areas where almost no rain occurred. First weeding has already taken place and sorghum yields will essentially depend on late rains. Crop situation is less promising in the neighboring Bakool region. Rainfall conditions have been generally favourable to germination of the newly planted sorghum in October, but the lack of rains in November has hampered good crop establishment in some of the significant agro-pastoral areas. Virtually no farming activities have been taking place in the rain-fed areas of north Gedo. Replanting has taken place in very localized areas of M. and L. Juba. Both rain-fed and irrigated crops are well established in most parts of M. and L. Shabelle.

'Nutrition Update' - Gedo

As the food security situation in most parts of Gedo continues to deteriorate, the consequences for the overall welfare of the population are becoming extremely serious. With malnutrition rates in this population previously the highest in Somalia, numbers of malnourished detected in screening and in selective feeding programmes have now reached totally unacceptable levels. Displacement of households towards relief programmes is noted to be increasing. An FSAU led nutrition survey is currently underway in Belet Hawa. ACF and Tear Fund hope to reschedule nutrition and food security surveys in Luuq for later in December. It is hoped that food aid distribution by WFP in Garbaharey and Burdhubo, along with that of CARE in Luuq, Dolo, El Wak and Belet

Hawa will alleviate the situation somewhat although it is difficult to evaluate the effectiveness of these interventions in the absence of agreement on population numbers and other basic information. Gedo Health Consortium plans to commence supplementary feeding in Belet Hawa and Burdhubo with the possibility of extending satellite services to Burdhubo and Dolo.

Preliminary reports on the nutrition survey in Belet Hawa, along with those undertaken by UNICEF in Qansaxdheere and Rabdure will be presented in the December 'Nutrition Update'.

Further details on these and other issues related to nutrition in Somalia in the November & December issues of 'Nutrition Update'. Contact noreen.prendiville@fsau.or.ke

THE ROLE OF REMITTANCE MONEY IN THE SOMALI ECONOMY

WHAT ARE REMITTANCES?

Remittance refers to money sent from Somali people who migrated abroad to their families in Somalia or to the Somali communities living in Ethiopia and Kenya. It is a way of providing support to poorer members of the family or the community.

Remittance money is believed to be by far the biggest foreign exchange contributor to the Somali economy and its estimated to be worth at least 500 million dollars in the North but the figure is likely to be closer to one billion dollars for the whole country. Remittance money has helped to stimulate investment and commercial activities within Somalia.

During times of extreme hardship, remittance money is particularly important at household level as it supports coping mechanisms. For example, although official reporting data is difficult to obtain, remittance inflow has allegedly increased about three times in order to cushion the 'market shock' associated with the livestock ban.

HOW IS REMITTANCE MONEY TRANSFERRED INTO SOMALIA?

The flow of remittance money is based on the *Hawala* system, which is the Somali traditional method of informally transferring money from one place to another. This system relies on trust, confidentiality and informal networks established by money transfer agencies. These agencies have a network of offices around the world where there are concentrations of Somali diaspora.

Money transfer agencies are cheaper and more adaptable than formal banking systems (commission 2-5%) and their great strength is that they generate the trust of Somali's living abroad. For example, money delivered to a flat in London could reach a family in Belet Weyne within days. Payments are received and disbursed in a highly informal manner, funds are essentially transferred by a phone call or fax and money does not necessarily move.

WHO ARE THE REMITTANCE COMPANIES AND WHAT IMPACT WILL THE CLOSURE OF THE LEADING COMPANY AL-BARAKAT HAVE ON THE SOMALI ECONOMY?

- The three main money transfer agencies in Somalia are Al-Barakat, Dahab-Shil and Amaal. There are reportedly six other minor agencies.
- In the South, most remittances go through Al-Barakat whereas in the north, most go through Dahab-Shil and Amaal.
- Following terrorist attacks in the USA on September 11 the offices of Al-Barakat were closed. Its reported that Al-Barakat had links with the Al-Qaeda terrorist network.

The closure of Al-Barakat has had a devastating impact on the money transfer pipeline upon which so many Somali's depend. (In particular, the closure of Al-Barakat's telecommunications wing is severely hampering the ability of Somali business to operate as other smaller telecom companies are unable to shoulder the burden of increased traffic.)

Somali businessmen used money transfer companies to arrange their cash flows so closure and uncertainty will be disruptive to growing industries such as the airline, road and transport sectors. Al-Barakat's closure will mean that many businesses will now need to physically move large quantities of cash around the country and abroad. Confidence in the money transfer system is also likely to have been affected when the Nairobi offices of Dahab-Shil and Amaal were raided in September.

Before the closure, Al-Barakat use to employ more than one thousand people but now only employs a skeleton staff of less than a hundred.

AT A HOUSEHOLD LEVEL- WHAT IS REMITTANCE MONEY SPENT ON ?

The bulk of remittance money appears to go to urban areas and directly benefits urban communities or the better off members of the rural communities. It may be used to pay directly for imported commodities or to support lifestyles that depend less on local products. However, a component of remittance must also go into the local economy. It does this either through investments that require local products such as building material or labour, (the construction industry in urban centres is thought to be closely linked to the remittance industry and this sector employs many of the poorest households) or through expenditure on local produce, for example, dairy products, locally consumed animals and agricultural produce.

WHAT EFFECT WILL THE IMPACT OF 'REMITTANCE SHOCK' HAVE ON HOUSEHOLDS?

This year Somalia has suffered from two big 'shocks'; the Livestock ban and poor *Gu* sorghum harvest (and poor *Deyr* rains in some areas.) A 'Remittance shock' on its own may be manageable but on top of these other shocks, it is possible that it will have a devastating impact on livelihoods which are already under great pressure and strain. In Gedo region which is currently experiencing severe hardship and drought, reports indicate that eighty five per cent of remittance money was transferred through Al-Barakat. This will not be easily covered by other companies in a short time. In South Somalia, Al-Barakat had diversified into banking as there were few facilities in the region due to insecurity. Al-Barakat's closure has therefore also hit small traders too, both in urban and rural areas whose money and savings are now frozen and not accessible.

The drying up of a substantial amount of the money transferred will lead to reduced investment and curtailed purchasing power among urban populations. This will affect the price of milk as urban people have less cash to spend on more luxurious items and shortages of hard currency force the value of the Somali shilling down further. Without investments, labour opportunities will decrease and so will pay rates, while demand for bush products is likely to result in lower prices for these commodities. All this points to lower and lower incomes and most importantly an inability to expand those sources of food and income at household level that Somali's have come to rely on in times of need. This will lead to an even less diverse diet and less access to basic services and accelerate the deterioration in nutrition status.

- Randolph Kent, United Nations Humanitarian Coordinator for Somalia addressing a press conference in New York on Monday 3rd December said 'we now find Somalia on the precipice of potential and total economic collapse'
- He said there had been significant development in the Somali economy over the last few years but following the ban imposed by Gulf States last year on the export of Somali livestock and more recently the closure of Al-Barakat, the always fragile economy now lies in tatter.

CONCLUSIONS

- The reduction of remittance money at household level could have devastating impact on the livelihoods of Somali's, many already suffering and struggling to cope with the livestock ban and impact of the poor *Gu* harvest in August.
- FSAU and FEWS NET will continue to monitor how reduction in remittance money impacts food security at household level in the critical months ahead.

POOR GU/KARAN 2001 CROP HARVEST IN NW SOMALIA

Crop establishment: FSAU's *Gu/ Karan* 2001 crop establishment field assessment was conducted in June/July. Poor *Gu* rains resulted in a drastic reduction of the planted area (down by 30-35% compared to *Gu* 2000). Germination conditions were by far non-optimal in large agricultural areas. The total established area was then estimated at about 1,600 ha which appeared to be the lowest level of the 4 last *Gu* seasons (see monthly report July 2001, Issue 8). Low income levels (on-going livestock ban) and reduced access to tillage facilities (tractor hiring due to high fuel prices as well as animal traction due to lack of fodder) were also key factors. Besides the direct implications of increasing fuel prices, the availability of tractors was drastically reduced during the critical period of planting in areas close to the Somaliland – Ethiopia border (tractors crossing the border to zone 5 of Ethiopia obtain larger number of tractor hours resulting in better earnings).

Gu/ Karan 2001 cereal production in Somaliland (MT), compared to previous years:

Gu/Karan	Sorghum	Maize	Total
1998	9,650	3,150	12,800
1999	14,850	7,000	21,800
2000	11,650	2,400	14,000
2001	6,200	1,550	7,750

Crop harvest: FSAU's *Gu/ Karan* 2001 crop harvest assessment survey was carried out in the first half of November in the agropastoral districts of W/Galbeed (Hargeisa and Gabiley), Awdal (Borama and Baki), Togdheer (Odweine and Beer) and Sahil (Sheikh). *Karan* rains, which are usually expected from late July to early September, were either very low or delayed. The average cereal production of northwestern regions amounted to about 17,000

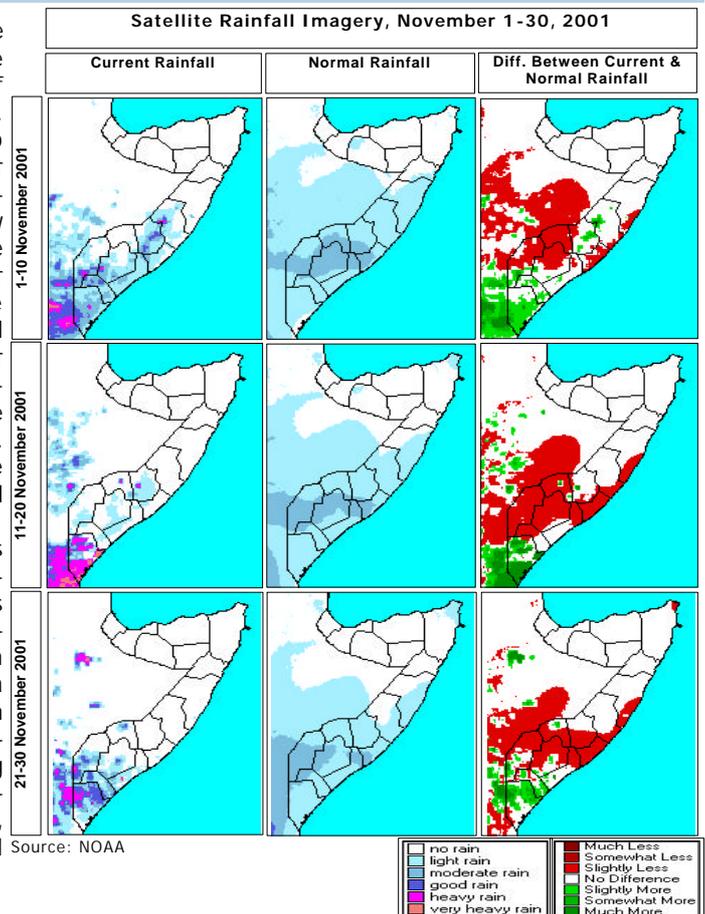
MT per year (6% of the annual cereal production of Somalia based on post-war data). This year, production of local cereals was far below average (sharp decrease in area cultivated combined with low yields). The total *Gu/ Karan* 2001 cereal production was estimated at about 7,750Mt of which 80% of sorghum and 20% of maize. This was well below last year's level (-45%) and down by 2/3 compared to the good 1999 harvest.

Overview by region/district: In Galbeed region, *Gu* and *Karan* rains were concentrated in the south of Gebiley, which use to be the most productive district of northwestern Somalia. The sorghum production of Gebiley district was this year estimated at about 3,600 MT (compared to above 7,000 MT in 2000 and close to 9,000 MT in 1999). Maize production was even more affected (only 1,000 MT produced in 2001). Cereal production was also abnormally low in Hargeisa district (about 1,300 MT for sorghum and maize combined, -63% compared to last year). In the area of Borama-Dila (Awdal region), the largest amount of rainfall was received within the second half of March. Rainfall was less intensive between April and May, which is the major period of planting for the long-cycle sorghum variety locally known as Elmi Jama. In addition, tractors were in shortage at establishment time (tractor owners got better job opportunities in Ethiopia). Many farmers missed the first rains and were unable to repeat planting more than once due to expensive tractor hire. Difficulties in accessing tractors are recurrent. Households owning strong oxen were able to till more land than others. However, due to the poor rains, the area cultivated remained significantly lower than last year (-35%). Early Maize perished in mid season and was pulled out for livestock. The total maize production of Awdal region did not exceed 300 MT. Sorghum grain production was estimated at about 1,300 MT, which is also well below average (-35% compared to 2000, -50% compared to 1999). On the other hand, good fodder production was expected. As usual, the total estimated cereal production of Odweine, Beer and Sheikh districts was very low (about 200 MT this year compared to less than 300 MT in the previous years).

DEYR RAINY SEASON IN SOUTHERN AND CENTRAL SOMALIA

The *Deyr* rainy season began in the **second half of October** in the most important rain-fed areas of Bay, Bakool and Middle Shabelle regions. Similarly, heavy rainfall was recorded in limited areas of Hiran. The rains were delayed in all other parts of southern Somalia. The whole Juba valley (including Gedo) remained relatively dry up to the end of October. Rainfall only started in the last days of October in Lower Shabelle region. Satellite imagery shows that light to moderate rainfall fell in the Shabelle valley as well as in the Juba valley during the **1st dekad of November**. Reports from the field indicate that heavy rains were received in large parts of Middle and Lower Juba at the beginning of November and confirm the late start of the *Deyr* rainy season in Lower Shabelle. Virtually no rains were received in the interriverine rain-fed areas during the 1st dekad of November (Bakool, northern Bay and northern Gedo). In the **2nd dekad** of November, good to heavy rainfall fell in Lower Juba while moderate rains fell in Hiran, Lower Shabelle, parts of Bay and southern Gedo. During the **3rd dekad** of November, good rains were received in the entire Juba valley (with the exception of northern Gedo). Localized rains occurred in Bay, Bakool and Lower Shabelle.

From the satellite imagery, slightly less than normal rainfall has been observed in most rain-fed areas of Southern Somalia in November (mainly Bay, Bakool, Gedo and Middle Shabelle—see maps on the right). However, according to recent field observations, rainfall conditions have been favorable to rain-fed crop establishment in most parts of Bay region (particularly in the surroundings of Baidoa town where above 270 mm have already been recorded between October and November compared to 250 mm in average for the entire *Deyr* season). The absence of rainfall in northern Gedo bordering Bakool region is of great concern (very poor pasture conditions, virtually no free grazing and no rain-fed farming). In the central regions, rainfall in the coastal and sub-coastal parts of Mudug and Galgaduud was also abnormally low.



IMPACT OF LIVESTOCK BAN CONTINUES

Somali pastoralists have become increasingly frustrated by the prolonged livestock ban. Pure pastoral food economy groups in the northeast/northwest/central Somalia have been particularly badly affected because they are constrained by limited alternative livestock trading routes.

The pastoralist livelihood is under increasing pressure as the dry and harsh *Jilaal* season (dry season) approaches and opportunities to diversify and find new coping mechanisms to offset their loss of income are decreasing. *Jilaal* is traditionally a critical period for pastoralists because good pasture and water deplete quickly so households and herds are forced to split – and migration takes place. At this time a pastoralist's energy requirements increase while at the same time the price of food and water rises too. To tackle this difficult period, pastoralists need to access more income, either from the sale of livestock or from their associated products. Some pastoralists also access income through the remittance system which has now been disrupted due to the closure of Al-Barakat.

UNDP and FAO set up a team to coordinate activities related to livestock production, health, and marketing in Somalia. Their campaign has achieved the following significant results:

- Lifting import ban imposed by the United Arab Emirates (UAE) on chilled meat and live animals from Somalia
- Recent lifting of import ban imposed by Yemen
- Understanding possible options to certificate Somalia livestock export
- Raising international awareness on the magnitude of the

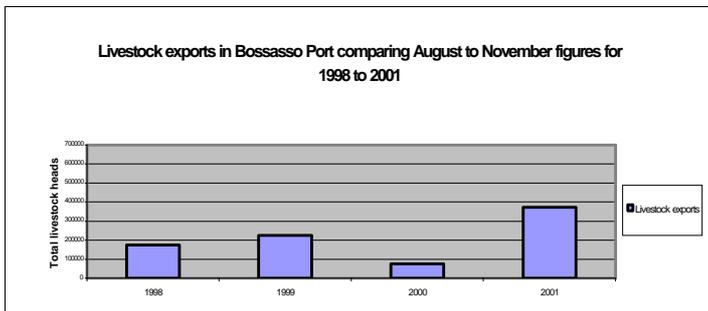
problem and its implications in both the natural and the socio-economic environments.

Meanwhile, other organizations have also been campaigning to get the livestock ban lifted by attempting to convince Saudi Arabian traders that Somali livestock are in a good health. Efforts have been stepped up for the Haji period (ends in February 2002) as this period constitutes a major opportunity for livestock marketing and consumption in Somalia.

Though the major objective of lifting the ban by Saudi Arabia is still under negotiation (its hoped that the recent lifting of the ban by Yemen will induce Saudi Arabia to rethink its decision) efforts to increase marketing options for Somali pastoralists have continued and alternative markets such as Egypt are helping to improve the number of livestock exported. Gulf exports to UAE and Yemen are also increasing because of Ramadhan and the approaching of the Haji. These developments are improving the situation but have yet to have a dramatic impact on trade and pricing.

At the same time, field-based NGOs and international agencies have been trying to provide assistance to pastoral communities still lacking market opportunities. Options for destocking and other market-related activities are currently being discussed. Unfortunately, however, the poor security situation in Puntland, combined with tension on the international scene are not facilitating these initiatives. Northern port activities (Berbera and Bossaso) have been jeopardized by these events. The impact of reduced remittances, which helped fuel trade activities and the reduction of their input into the Somali economy will have a devastating impact on all livelihoods, including the pastoralist livelihood.

(Fig 1.)



(Fig 2.)

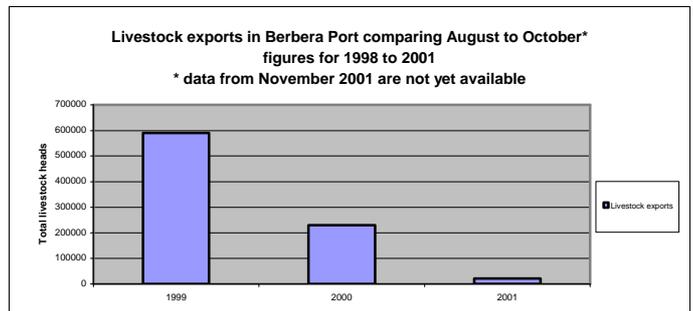
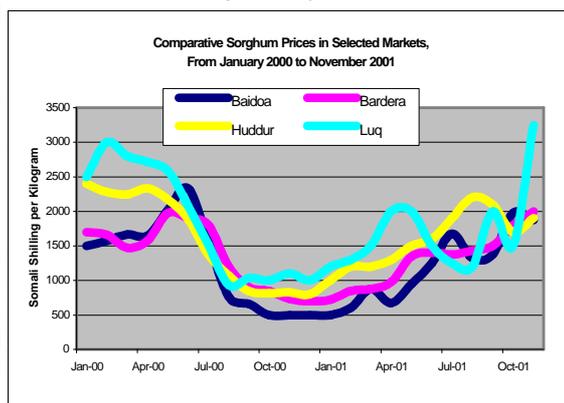


Fig 1 shows an overall increase for the port of Bossasso of almost 100,000 heads compared to last year

Fig 2 shows how the livestock export trade shows has consistently shifted from the port of Berbera to the port of Bossaso

SORGHUM PRICES FLUCTUATING IN SOUTHERN SOMALIA

As a result of the poor *Gu* 2001 rain-fed production, sorghum prices started to increase in August/September. Cereal prices have been fluctuating during October/November. On going food aid interventions and good/bad prospects for the current *Deyr* cropping season were key factors in determining staple prices in southern Somalia. In Bakool (Huddur), sorghum prices dropped from above 2,000 Ssh/kg in September to 1,700 Ssh/kg in October after the starting of food for work activities. A slight increase has been observed in the second half of November (2,000 Ssh/kg). In Bay (Baidoa), the retail sorghum prices gradually increased from 1,200 Ssh/kg early August to 1,800-2,000 Ssh/kg in October/November (see graph). Crops are now well established in most parts of Bay region and prices are not likely to increase further before the *Deyr* harvest. Prices fluctuations in north Gedo are reflecting a very low market activity (relief food). Cereal supplies were also below normal in south Gedo where sorghum prices increased by 11% in November compared to last month (Bardera).



HEALTH

- From 1 December, health related activities supported by SACB partners and other INGOs have resumed in **Jowhar**.
- In Hargeisa, health personnel in both the public and private sector continue to remain on the alert for further cases of **meningitis**. Training on case detection and management has been provided by WHO. Plans are in place for mass immunisation if this is indicated.
- An increase in **dysentery** cases and related deaths have been reported throughout the country in the past month.
- ACF continues to report cases of **measles** in their therapeutic feeding centre in Mogadishu.
- No reports of **cholera**.

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

NW & AWDAL

It is anticipated that if the *hays* rains fail and if there is not a complete lifting of the livestock export ban the food security situation will deteriorate quickly and high livestock deaths are expected among the poor pastoralists from **west Berbera to Zeila**. The agro-pastoralists are expecting less than 20% of the normal harvest with the exception of 7-10 villages in Arabsiyo and Kalbaydh areas and towards Tog-Wajaale plains which are expecting a normal to above normal harvest. It is anticipated the agro-pastoralists will start purchasing cereal earlier than normal (mid *Jilaal*) which may cause cereal prices to rise. Fodder production is better than normal. However, with the recently opened livestock market in Yemen the transit livestock will put pressure on these available fodder stocks. There is an increase (12-25%) in price for cattle in Hargeysa due to the higher demand for leaner meat during Ramadhan. The rains produced browse and pasture along the mountainous /sub coastal belts causing larger than normal migration of animals from coastal and hawd into these areas.

N-NUGAL & S-BARI

The Deyr rains were good except in the eastern and northeastern half of Qardo district where most of the berkads remain empty or contain small amounts of water. Large numbers of livestock migrated to the southern part of Qardo and Dangoroyo district causing a decrease in pasture availability. If the Hays rains do not fall soon in the coastal areas the immigrant population will remain in the area until the *Jilaal* season putting pressure on water and pasture resources. The camel parturition rate is lower than normal, but camel milk is still available. Goat production is satisfactory but not as high as previous years. Livestock prices in the local markets increased. Lobster fishing was fair and is an important source of income, however fishing during the breeding season will negatively impact on fish resources. The absorption capacity of the UAE and Oman market is limited. The insecurity around Garowe has caused families to flee, and has disrupted small businesses. The authorities in Bossaso banned the transport of all fuel to Garowe and this is likely to cause commodity prices in the region to rise.

SOOL

The *Deyr* rains were below normal in the high potential areas of Sool region, berkads in these areas are already empty and pastoralists are preparing for a longer than normal *Jilaal* season. Earlier in the month, large amount of livestock migrated (largest during the last decade) from the drought affected areas of eastern Sanag and Bari to the Nugal Valley, putting significant pressure on water and pasture resources. The poor condition of these livestock makes them difficult to sell. Pastoralists with camels migrated to the *hawd* zone where there was significant rain filling the berkads. The shoats in the *hawd* are in good condition and milk production has improved, however camels and cattle are taking longer to recover. Prices for these livestock (local and export) are increasing. The reduction of remittances will impact directly and indirectly on most households. The livestock export ban to Saudi Arabia continues to be imposed, causing reduced available income for purchasing livestock drugs and consequently high death rates are reported among shoats due to endemic diseases.

SOUTH NUGAL & N MUDUG

The Deyr rains are promising and provided some relief to the previous drought stricken area of Goldogob. The grazing condition is slightly above normal. The livestock condition has improved causing increased livestock production and therefore improving the food security situation. However, the poor pastoralists in the Goldogob and Galkayo areas are still in a precarious situation due to their reduced herd size. The food security situation of these pastoralists is heavily dependent on receiving gifts from relatives living in urban areas and some have had to migrate to urban areas in search of employment. Terms of trade do not favour the pastoralists resulting in low cereal demand from the rural areas as the pastoralists rely on their milk. Due to the high supply of good quality shoats in the market, prices have fallen by 20%. The closure of the money transfer systems has resulted in a drop in remittances by 30-35%. The recent insecurity in Garowe resulted in the closure of the livestock trading routes to UAE and Oman and some families moving out of Garowe.

LOWER SHABELLE

The region has received normal to heavy *Deyr* rains in most parts; these were concentrated in the last week of October and the first two weeks of November. This, together with the canal rehabilitation, has increased water availability for human and livestock consumption, contributing to the establishment of good grazing and the regeneration of trees and shrubs for browsing. This has enabled the pastoral groups to move their livestock, whose body condition and milk production is normal, away from the river. Both rain fed and irrigated crops are well established in most parts of the region, except the coastal belt. There has been an increase of area in the land cultivated around Merka, Qorioley and Kuytenwarey as well as the rainfed area around Afgooye. High staple food prices and relatively low labour rates are making food access difficult for the poor in the rainfed areas, although there has been a slight drop off in cereal price towards the end of November. There has also been an improvement in security, with the dismantling of checkpoints around Merka town. However, ambushes and banditry, as well as on going fighting over resources and clan disputes are still a problem.

BARI REGION

Most livestock migrated to the Nugal valley and South East Iyax where the rains were heavier. The livestock condition is satisfactory, water availability is normal but pasture is in short supply especially in the Dharoor and the surrounding areas. The restriction on the number of livestock exported to UAE and Oman was not enforced. The price for an export goat has risen to \$30-35. The livestock traders benefited from these high prices while the livestock owners received \$10-12/head. Approx. 700 camels were exported to Egypt. The price for export camels increased by 18.5%. The urban poor have benefited from these port activities. The price of a local goat fell due to the large number of goats from Sanag and Sool. The flow of Food aid from Zone 5 has kept cereal prices low. The inhabitants from Iskushuban and Beyla agreed to stop catching fish and lobster during the breeding season in order to safeguard fish stocks in the long term. This is beneficial for the fishing industry but has an immediate negative impact on some of the poor pastoralists who rely on fishing for income.

SANAG & TOGHDEER

The overall food security situation for these two areas is considered to be normal to below normal. The exception are the agro-pastoral areas which are expecting a below than average harvest due to the poor *Deyr* rains. The poor *Deyr* rains in Sanag caused large scale migration to better grazing areas in Nugal valley causing over grazing. It is anticipated there is insufficient water and pasture to be able to maintain normal livestock condition and production rates to the next *Gu* season. The important mountainous grazing areas which are used in the dry season only received rain in a few pockets. There are more livestock sales in Sanag due to slightly increased activities in Bossaso port. The collection of Arabic gums in the mountainous areas has now become an important source of income for some families. Fishing between September to June is also an important food and income source. The lifting of the livestock export ban by Yemen will improve the livestock trade. An Arabian livestock trader purchased 2000 export quality shoats causing prices to rise from 160,000 / head to 230,000 SoSH.

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

GEDO

Food insecurity in Gedo has continued to deteriorate, especially in the northern districts of Luuq, Dolow, Garbaharey, Buurdhuubo and Belet Xawa. The situation is expected to become 'alarming' from the New Year, when the harsh *Jilaal* dry season augments the continuing drought. However, El Waq and the southern half of Baar-Dheere received quite good rains, the latter obtaining sufficient amounts to enable farming in the high potential sorghum area east of the Juba River. Consequently, households in the northern five districts are making last-minute efforts to move all their livestock to neighbouring areas that are now offering some pasture. Within the households, only the women with small children, the sick and the very old are remaining behind; they expect to move from the villages to the towns and main centres when they finish their remaining resources. The areas that the latest movement of people have migrated to are: Berdale in Bay region, Wajid in Bakool region and El Waq and Baar-Dheere within Gedo. For example, animals going from Belet Xawa to El Waq must pass through Luuq down the river to Buurdhuubo and on to El Waq via Garbaharey. Luuq town itself has also experienced an influx of people, mostly from the El Bon area to the east but also including some people from Garbaharey and Yeed and Wajid in the west side of Bakool region (these parts of Bakool are equidistant between Luuq and Xudur). Virtually no rain fed farming has taken place, while the uncertain market and high fuel prices have made it difficult for farmers on irrigated land to invest in large holdings this season. CARE have distributed 1,430 MT in Luuq, Dolow and El Waq districts (people from Belet Xawa received their rations at the end of October and hence will be the first to receive in December), while WFP has distributed 330 MT of cereals, pulses and oil in Garbaharey and Buurdhuubo districts.

HIRAN

Hiran region, like Bakool, has received late rains this *Deyr* season, which are mostly somewhat below normal. The exception to this is in the pastoral areas, which received ten days and 83-170 mm of rain, reviving pasture. This has been depleted somewhat by an influx of animals coming from the riverine areas. Camels and shoats' condition improved rapidly following the rainfall but cattle are improving more gradually – they were in far worse condition to start with. There are no reports of outbreaks of disease, although there are complaints of the lack of drugs to deal with tick-borne diseases and common parasites. The area planted is more for this *Deyr* season than it was last year and if successful, expectations are that it will mitigate against the poor *Gu* season. Better-off households have stocks of grain, while the poor are dependent on purchased cereals, for which they earn their incomes from labour and self-employment activities. Currently, cereals are being imported from Ethiopia, and terms of trade are good for the pastoralists and the labourers/farmers.

BAY

This month, Bay region has received what could be described as 'normal' *Deyr* rains. Baidoa appears to have benefited most while Burhakaba and some parts Qansax-Dheere also received quite good levels. The latter district has some pockets where the rain has failed and in these places the picture looks similar to the last *Gu* season. Nevertheless, expectations of a reasonable *Deyr* harvest are quite good. Furthermore, Dinsor district has now also received rain and crops there appear quite normal. The same applies to Berdale. There has been an influx of Livestock from Gedo into the region – these are passing through Berdale and Qansax-Dheere. Opportunities for agricultural employment have increased with the farming season, helping poorer households obtain income from labour and further encouraging the return of household members who migrated temporarily to the riverine areas. Market activities decreased somewhat, in response to disputes over the cancellation of 500/- and 100/- notes. Nevertheless, cereal prices have remained quite stable and terms of trade for labour and small ruminants against grain are quite good.

JUBA VALLEY

Except for a few pockets like Xagar and Salaagle, rainfall has been substantial, improving both crop and livestock condition. Pasture and water availability in grazing areas have improved significantly. However, the continued presence of Gedo pastoral groups in the region has raised fears of overgrazing. Livestock price, especially for cattle, are good and this is due to improved grazing and water access along the main trekking route, as well as a high seasonal demand in Garissa in Kenya. Milk and dairy prices are good and overall, pastoralists' terms of trade are considered favourable. Most farmers have reached the weeding stage for their crops, which has enhanced opportunities for employment among the poor. However, rain fed farms in Salaagle and Xagar are doing badly, with poor germination and replanting taking place. Insecurity continues to affect the region, with increased numbers of displaced people and the possibility of reduced trade with neighbouring areas in Kenya (which is reviving following the re-opening of the border). Staple prices are high and imported commodities even higher. Recently, ICRC started rehabilitating water catchments in parts of Afmadow and Xagar districts.

BAKOL

Rainfall, which started in the second dekad of October, continued to be patchy and in general, has been less than average. Nevertheless it has improved pasture considerably and livestock in Bakool are reported to be in good condition, with milk and ghee production returning to normal. Cattle, are now showing signs of improving. The biggest problem reported is the prevalence of livestock diseases, particularly in the camel grazing areas. Apart from the arrival of livestock from neighbouring Gedo Region last month, there have not been any further significant movements. The high-potential sorghum producing area around the village of Madayto (an area north of Wajid that extends up into Raddhuure) had just enough rains to allow the germination of crops but then there was not a sufficient amount following that for growth. Terms of trade for both pastoralists (livestock to grain) and the poor (labour rate to grain) remain favourable. WFP, UNICEF and partners continue their combined supplementary feeding/family ration programme in an effort to address the existing food deficit. Reports in Gedo indicate that some pastoral groups from Yeed in the northwest have moved to Luuq to make use of the TFC and health facilities there. Interviewees from this area explained that they had travelled to Luuq because of extreme drought conditions and had chosen Luuq for the availability of labour as well as the access to relief facilities; Luuq and Xudur are equidistant from Yeed.

COWPEA BELT

Rains have been scattered; north Hobyo, Xaradheere, Galhareeri and west of El Dheer benefited, while the area between Warsheikh and El Dheer and from Xaradheere to Hobyo were still dry. Water availability has improved and water prices have fallen by 20% as the distances to sources has shortened. Shrubs, trees and grasses have recovered where rains are reported and livestock condition is improving gradually. Prices for both imported and local qualities of animals have remained high, while milk production is yet to recover. Cowpea and sorghum planting has begun, with many farmers completing the first weeding. The poor terms of trade are forcing families to reduce their numbers of meals, this will continue unless there is enough *Deyr* rainfall. Security is still a problem around Middle Shabelle, but further north from El Dheer and Xaradheere the situation is calm. This area will require close monitoring over the coming *Jilaal* season.

MIDDLE SHABELLE

Rainfall, although late, has been normal to good, fully charging water catchments in the pastoral rangelands and restoring grass, shrubs and trees. Consequently animal condition and milk production have improved. There has been no outbreak of any major diseases over the month, but livestock keepers are concerned about the lack of veterinary drugs. The outlook for cropping looks good; riverine maize having been planted at different times and therefore in different stages of development, while sorghum is still in its early growing stage. In an area east of Jowhar, the river burst its banks and damaged about 300 ha of maize. However, the river is now subsiding. Prices of local quality goats are high and terms of trade against cereal are good, this is said to be due to a short supply as livestock keepers fatten their animals. A day's labour buys about 5 kg of cereal, an average rate, while milk has become cheap in cereal terms. Overall food availability is good.