

EDITORIAL

Lower than normal rainfall is placing increasing strain on the resources of pastoralists and has devastated a large proportion of the main sorghum crop production. This month's editorial draws attention to the mid and longer-term outlook.

In order to consider the consequences of a poor *Deyr* season, the FSAU has run a **predictive analysis** i.e. a scenario assuming a very poor *Deyr* crop performance and with prices for staple foods rising significantly over the next 12 months. This has resulted in a potential food gap close to 30,000 MT of cereals when one includes 5000 MT for IDP's and Urban poor. When adding possible needs in the NE & NW (to be assessed in August) and assuming the continuation of the livestock ban, this would result in a preliminary estimate of 40,000 MT for the whole country.

The detailed analysis completed so far only covers the southern part of the country up to Mudug and has followed a process that has predicted adequate access to food until the *Deyr*. After that point the longer-term outlook will be determined by a number of factors but the key ones are the *Deyr* crop performance, then any resulting changes in market terms of trade, changes in purchasing power and, access to normal coping mechanisms (conflict being the main potential constraint).

The problem we are faced with is that any scenario is a **prediction** and the FSAU will only be in a position to report on the **actual** food security status by September for the *Gu* season, and December for the *Deyr* season as our regular monitoring continues. December would be the time when the predictive analysis presented in the above scenario would be put to the test and when the more vulnerable households would be coming under increasing pressures in not only sustaining their livelihoods but also experiencing personal hardship and hunger.

In order to avoid this becoming a reality, donors and decision-makers are requested to very carefully consider the scenario(s) being presented by the FSAU and prepare for timely and appropriate responses while continuing to seek alternative solutions.

HIGHLIGHTS

FOOD PIPELINE : Current stock position for CARE (donor USAID) is 3,700 MT. Another 9,100 MT is expected to arrive between September and November. WFP current stock levels are 4,000 MT. WFP estimates a minimum requirement of 25,000 MT to maintain the programme within the country at anticipated needs levels to mid 2002.

KENYA BANS TRADE ON SOMALIA BORDER : The Kenyan government has banned cross border trade with Somalia. This includes the frontier town of Mandera right down to Kiunga in Lamu District. Depending on how effectively the ban is implemented and how long it lasts, it could impact quite drastically on the livelihoods of the various pastoralist and agro-pastoralist groups in the South. However, the ban comes at a low point for cattle sales, when most traders are actually returning to Somalia from Kenya because of seasonal low prices. It will probably still affect the poor because options for getting a better price will be reduced and prices will subsequently be lower. Likewise, cereals shipments filtering into Somalia from Kenya could be stopped.

IMPACT OF LIVESTOCK BAN CONTINUES IN NORTH : The livestock ban to major Gulf markets is still having a serious impact on the economy – especially in the north.

Although reduced port activity is a seasonal constraint, the long-term impact of the ban is now reshaping households' coping strategies. Imported foodstuffs have been consistently reduced and consumption patterns are shifting towards local products (cereals) and increased milk marketing and consumption. Diversification of economic activities by members of rural households has also been reported.

During this month the FAO has fielded a formulation mission concerning the regional programme for livestock export certification system. FSAU will report their findings in the September issue of the FSAU Monthly Report.

RAINFALL : Meteosat imagery shows light rainfall, (*Hagay*) (south) and *Karin* (north) in small areas of Awdal and Lower Shabelle regions during the first dekad (1-10 July), heavier rain fell in Lower Juba close to the border between Kenya and Somalia. The rest of Somalia was virtually dry and this has been confirmed by reports in the field. In the second dekad (11-20 July) the whole country was dry except for small pockets in Middle Juba and Awdal regions.

GU 2001 SEASONAL ASSESSMENT

FSAU *Gu* 2001 crop harvest assessment in southern and central Somalia will take place in August. Related field activities will be carried out in the first two weeks of the month leading to a revision of the figures that were previously released (FSAU/FEWS Net Focus, issued July 9). Crop harvest data and other monitoring information will then be compiled in preparation for the FSAU food security seasonal assessment workshop, which is planned to be conducted in Somalia during the third week of August with the technical assistance of the 'Food Economy Group'. At this occasion, the food security situation of all agro-pastoral, riverine and pastoral populations will be reviewed. A wide range of scenarios will be taken into consideration using the Household Food Economy Analysis (HEA) as the standard framework for FSAU and FEWS-net. All partners are invited to participate in the final analysis at the presentation of the findings.

NUTRITION UPDATE

Predictions of a poor rain-fed harvest in four regions in Southern Somalia have prompted an intensification of nutrition surveillance activities in those regions. In Gedo and in some parts of Bay and Bakol, levels of malnutrition have remained relatively high over the past two years, with nutrition surveys in times of relative food security and reports from supplementary feeding programmes indicating a highly vulnerable population. It is very likely that any deterioration in food security will have a significant effect on the nutritional status of population groups in these areas. The Nutrition surveillance component of FSAU will continue to monitor the situation in these areas very closely and a full report will be given in the August Nutrition Update.

The separate FSAU monthly publication 'Nutrition Update for Somalia' is available from noreen.prendiville@fsau.or.ke or info@fsau.or.ke

GU CROP ESTABLISHMENT IN THE NORTH WEST

Agro-pastoral populations represent approximately 250,000 individuals in the North West. Rain-fed farming is the main farming system. In Odweine (Togdheer), flood irrigation provides additional soil moisture. Besides agriculture, livestock rearing, and to a lesser extent, fodder production, contribute substantially to the household income. FSAU's Gu 2001 crop establishment field assessment in the north west was conducted in late June and continued through early July (Galbeed, Awdal and Togdheer regions were covered).

Rainfall: Gu rains normally fall throughout the north west from March to June. This season's Gu rains were late and poor in general, with the exception of Sanag and northern Togdheer. Amongst the visited areas, Awdal region was the most affected by the disparities in rainfall timing. *Todob* rains, which are occasionally received before the Gu rains, were in excess around mid-March. A long dry spell followed throughout April. Rainfall was unevenly distributed during the first and second dekad of May (*Masiya* planting season). In the western part of Gebiley (Galbeed), the rainfall situation has also been poor in March/ April. However, these areas received much better rains at a later stage (particularly in May and to a lesser extent in June), which coincided with the usual planting seasons locally known as *Masiya* & *Gumbood*. The overall rainfall situation was less favourable in Hargeisa district, though it was still much better than in Awdal. In Togdheer region, rainfall was generally poor in the farming areas of Odweine district.

Planted and established area: the total planted area during this Gu season was estimated at about 6,000 ha, which is significantly less than last year (down by 30-35%). It is also extremely low when compared to 1999, which was a good year (-80%). As usual, most of the planting activities took place in Gebiley district (45% of the total planted area this year), followed by Hargeisa and Odweine areas (both slightly above 1,000 ha). Due to difficult germination conditions, the Gu 2001 estimated established area came down to 1,600 ha and this appears to be the lowest level of the 4 last Gu (see table). The sorghum established area was slightly lower than in 1999 and 2000 (respectively -7% and -24%).

The difference was more significant for maize (only 300 ha this

year compared to 600 ha in 2000 and 3,500 ha in 1999).

Table 1: Gu 2001 crop established area (ha) in the North West compared to established areas in Gu 1998-1999-2000

Gu	Sorghum(Ha)	Maize(Ha)	Total
1998	na	na	7000
1999	1400	3500	4900
2000	1700	650	2350
2001*	1300	300	1600

(*): late planting was still going on early July (assessment time)

The reduced area cultivated was mainly due to the following factors:

- Low income levels (livestock ban) combined with uneasy access to credit, resulting in poor access to agricultural inputs.
- High fuel prices hampering tillage by tractor hiring and reduced tillage assistance from the international community.
- Animal traction constrained by the shortage of pasture.

Production prospects: as usual, the contribution of Togdheer to the end crop results will be minor. At the moment, Gu crop expectations are very poor in Awdal and Galbeed. Incentives to increase the area under cultivation are encouraged. After the poor Gu season, the *Karan* rains, which are usually expected from late July to early September in the western areas, will be particularly important this year (close monitoring needed). Last year, although the cropping season also started with a relatively low Gu established area (2,350 ha), Gu/*Karan* 2000 total harvested area finally reached 23,700 ha.

THE AFFECT OF POOR GU RAIN ON GEDO REGION AND PASTORALISTS

Gu rains in Gedo region started late this year, in April - and no rain was received in May. This is not normal for the region. Northern parts of Gedo have suffered several seasons of poor rains. Southern parts have received average rainfall. Two huge waves of livestock migration have taken place - earlier in the Gu season from northern districts (Dolow, Buulo Hawo and Lugh), south to Bardera. The second wave of migration occurred at the end of May beginning of June, from northern districts to Bakool, Bay, Lower and Middle Juba.

In general, better-off and middle wealth groups can cope more successfully with migration as they are more mobile and can divide their herds. Poorer households are not so mobile, finding it difficult to divide their herds (as they do not then have access to them for income). The livestock that have been left behind have poor pasture resources. This extensive migration has also caused some deaths along the way due to pasture shortages and high energy requirements. Reports from Gedo suggest that cattle deaths have increased.

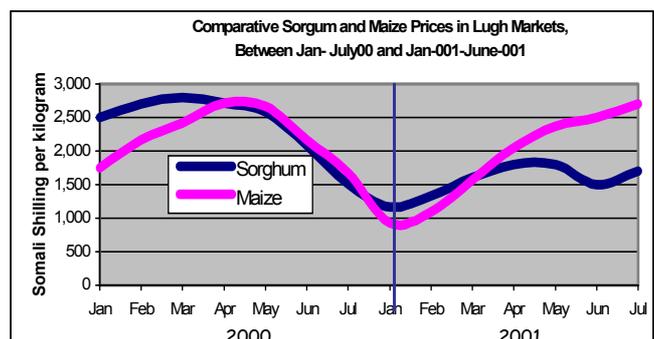
It has been reported that substantial numbers of livestock from Gedo region have now reached as far as Kismaio and Badhadhe in the far south. Others are reported to be in Middle Juba. Herders from Bardera and El-Wak say their areas are now overgrazed due to huge passing herds. In Gedo livestock condition and production (especially milk) has declined due to the shortage of pasture and water. Prices of food and non-food commodities are also increasing and currently the region is experiencing insecurity making movement more complicated and limiting communication with neighbours in North-East Kenya.

Market prices and Terms of Trade

Pre-harvest cereal prices show an upward trend in most reporting markets, due to short supplies, especially in rainfed markets,

Bay, Bakool, Gedo and Hiran, where Gu production prospective are less favorable or failed. The supply of staple cereals to markets in Gedo region remains poor and largely dependent on inflows from neighboring districts markets. According to the FSAU field monitors uncertain security on the roads and supply routes impedes inflow of cereals, such as maize and sorghum, to markets in Belet Hawo, Dolow and Lugh and other north Gedo markets, and has led to increases in commodity prices. As shown below, in Lugh market, the prices of sorghum rose by approximately 13 percent, from Ssh1,500 per kilogram in June to Ssh1,700 per kilogram in July. Similar trends were also observed to maize prices. High prices limited households' access to market in the region. Cereal prices are expected to increase further in the coming months. Similarly livestock prices also declined, due to lack of demand as well as body deteriorated, resulted shortage of forage. As livestock prices are still near to normal, especially goat, unfavorable terms of trade for agro-pastoralist were reported in Gedo markets. For instance, in Bardera, local goat /sorghum terms of trade decreased by seven percent.

However, in Lugh market, terms of trade improved slightly.



EARLY WATER STRESS IN HAUD AREAS OF TOGHDEER AND SOOL REGIONS

FSAU recently visited *Haud* areas of Toghdeer, Sool, Nugal and Mudug regions as part of its regular post-*Gu* pastoral seasonal assessment. In assessing food security conditions, factors considered included water and pasture availability and accessibility, livestock conditions, and marketing conditions. The assessment revealed severe water shortages in certain areas. (causing increased household expenditure on water and increased demand on household labour). This is particularly concerning so soon after the main rains, and compounds stresses caused by the livestock ban and inflation - pastoralists have already had to cut back on other expenditure and extend coping strategies. **Further assessments are being made by agencies active in the areas concerned.**

Rains : The following table below indicates how recent *Gu* main rains have been poorer than comparable figures, e.g. the normally shorter *Deyr* rains. Neighbouring Warder district of Region V, Ethiopia has also had very poor rains, causing large-scale in-migration of livestock in to Sool and Toghdeer regions, putting additional pressure on limited water and pasture resources.

	GU 2001	DEYR 2000
GAROWE	48 mm	na
GALKAIO	47.5 mm	57.4 mm
JALAM	53 mm	56 mm
JERIBAN	70.9 mm	96.9 mm

Indicators of water problems:

- Highly abnormal seasonal migration
- Very high concentration of livestock
- Abandoning of villages
- Poor livestock conditions (localised)
- Early watering of livestock
- Water prices high (double the norm in some places)
- Water trucking started very early in some places (Widh Widh)

Affected areas (starting with worst hit) are : Bali-do'ole to Buhoodle town, Bali-Ad and Dharkay-Geenyo of Las Anod and Do'omo of Ethiopia, Wid Wid, Saah-Dheer and Daba-taag of Las Anod Haud.

Coping Strategies include : Livestock sales (at low prices). Increased slaughtering of own herds. High dependence on firewood sales. Increased labour seeking in Buhoodle town (difficult given economic constraints). Credit & gift seeking (limited due to large-scale problem.)

REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS >> P. 3

NW AND AWDAL

Due to past poor rainy seasons, high previous migration levels and high concentration levels of livestock, a very high risk exists of serious livestock deaths should the imminent *Karan* rains fail. Good rains (in intensity and distribution) are necessary to replenish pasture in a wide area and allow livestock to disperse from their current high density levels. Worrying asset depletion has already taken place in recent seasons for poor and lower middle income pastoral groups. Urban dwellers (in Hargeisa and west) have benefited relative to other urban areas from a more stable currency (compared to areas using the Somali Shilling - Burao and east) and a more diversified economy (east of Hargeisa becomes progressively more pastoral and therefore more affected by the livestock ban). Other positive factors for urban groups are increased numbers of visiting diaspora (summertime in the US and Europe) and the partial lifting of the ban on construction activities in Hargeisa. The border closure with Djibouti however continues to have a serious negative impact on pastoral and urban groups in the far northwest.

N-NUGAL AND S-BARI

Food security concerns are highest for poor urban households and government employees on fixed incomes, due mainly to the effects of inflation and limited job opportunities. Close monitoring of nutritional status for these groups is required. While the past *Gu* rains were poor in general, in most areas pasture and water for pastoralists is considered adequate to reach the next rainy season. The exception is Dangoroyo area where rains were very poor and water trucking has already begun. Traditional systems of intra-community support are critical to protect the poorest groups, however in the face of the current economic difficulties (livestock ban and inflation), coping mechanisms are being severely stretched. The *Deyr* rains are still 2 months away.

BARI

Generally, food security in this region remains normal, with a few patches in Ga-gaab where the situation has deteriorated somewhat due to water and pasture shortages. *Gu* rains were good and hence livestock condition has improved; the *Hagaa* winds are, however, slowly reversing this, resulting in herders moving their animals closer to permanent watering points. Most *berkads* are still full and water prices are low. Camel milk production has decreased since last month but remains good; prices have, however increased (+17%) since last month. Dairy production has helped offset the poor terms of trade from livestock to grain, while a decision by the Puntland authorities to limit the number of animal exports to the Gulf has strengthened prices in UAE but not at home, primarily benefiting the export traders. Shipments of shoats to Oman have started and this market could substantially increase demand. The seasonal seaport closure and an influx of pastoralists from Nugal do weigh against rural livelihoods. The urban poor benefited from employment opportunities when exports increased but this seems to have been lost with the new limitation.

S-NUGAL & N-MUDUG

This area has two zones: the *Hawd*, which has suffered a poor *Gu* 2001 rainy season and the Addun zone, which is experiencing a recovery. The worst off among the herders in the former are struggling with the resultant poor pasture and poor terms of trade brought about by the Arab states' livestock ban and dwindling supplies of cereals from Ethiopia and southern Somalia. The Addun zone has consequently experienced an influx of people and animals who are seeking the better pasture. Milk marketing has improved in that area. Both zones are being subjected to the hard, dry *Hagaa* winds, which are drying up pasture and water sources.

SOOL & BUHOODLE

Once again the very poor past *Gu* rains and resultant dry conditions continue to cause grave concern for poor pastoralists that remain in Haud areas of Buhoodle district. While the majority of herders have taken their animals to the Nugal Valley and Sool plateaux areas, high concentrations of livestock and people can be found in Balli'ad village of Buhoodle district and Dharkayn'geenyo and Saah dheer villages of Las Anod district. Community funded water trucking is already taking place in many of these areas which is highly unusual for the time of year - soon after the main *Gu* rains and 6-8 weeks before the *Deyr* rains. Given the current inflation and the livestock ban the ability of poor pastoralists to pay for water is very difficult. Water prices are at least 2-3 times higher than the norm. High livestock death rates are expected in localised areas prior to the *Deyr* rains.

SANAG & TOGDHEER

Concern for food security remains highest for poor urban groups of Burao town and poor pastoralists of the eastern Haud due to the ban, inflation and poor recent rains. However, near normal *Gu* rains in most of Sheikh district, Odweine district and Sanag region mean that in these areas the worst impact of the ban and inflation are temporarily alleviated by increased milk production along with ongoing expenditure cuts. Abnormal livestock deaths are expected in August and September in the eastern Haud areas. High livestock migration has taken place over recent months from Haud areas of Togheer to Region V of Ethiopia. Remittances have increased from last month in support of relatives. The ban on construction activities for Burao town has been partially lifted increasing job opportunities.

>> P. 4 REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS**HIRAN**

Apart from the lack of *Hagaa* showers, the pattern in Hiran was more or less normal, with cool, heavy winds. The Shabelle river level dropped and water catchments in remote areas have dried up. Crop condition is altogether poor, following erratic and low rainfall during the preceding *Gu* –rain fed crops are considered to have had an outright failure, while along the river bank, only wealthier families have been able to take advantage of irrigation, and they are the only people who will be able to gain significant harvests of grain and fodder for livestock. Grazing has deteriorated due to high concentrations of livestock in the area and cattle owners are reportedly taking their herds further south. Cereal prices continued to rise (gained 15% in Somali shilling terms), resulting from poor production and decreased inflow from Ethiopia. Prices of cowpeas and sesame also increased, as did livestock prices, thanks to demand from Bossaso and Mogadishu. Terms of trade are therefore good for wealthier pastoralists but not for farmers.

COWPEA BELT

This area has had a normal *Hagaa* season: some light showers nearer the coast and drizzle in the northerly parts from Ceel Dheer to Hobyo. Unfortunately, crops have been affected by strong seasonal winds and an infestation by aphids and armyworms, which may reduce the pending *Gu* harvest. Nevertheless, water availability and pasture are normal; around Adale and Warshek in the southern coastal part there is good grazing. Essentially, livestock condition deteriorates the further one moves north or inland. Milk and meat production is moderate while the lifting of the livestock ban by the UAE has seen some export of cattle and shoats to the Gulf. Consequently prices are moderate and imported goods depend on the prevailing exchange rate with the dollar.

LOWER SHABELLE

There was heavy rainfall across most of the region in the early part of the month, otherwise the weather remained cool and cloudy with strong winds. The rainfall was too late to save the rain fed maize zones and the crop there will be poor this season, impacting on the poorest wealth groups who have few livestock and assets. Farmers in some rain fed areas (Afgooye and Merka) replanted following the heavy showers. The Shabelle River started its seasonal cresting and the outlook for irrigated farms is good, adding a benefit in terms of employment opportunities. There was some flood damage in Merka district. Overall, cereal stocks are low and prices are high compared with last month, although they did stabilize during the month. Imported goods' prices are steadily rising with the depreciation of the shilling. Pasture has improved and condition, milk production and conception rates/delivery of all livestock have all improved.

BAY

The weather has been dry, and water shortages have forced some families to move out of their villages. Grazing and fodder are also very poor, causing deterioration in cattle condition. Cattle prices are also down. Shoats and camels, however, are still normal. There has been an increase in self-employment activities, particularly charcoal selling, water collection and selling and petty trading. Prices of all staples are up and have risen faster than the exchange rate (price change: +14% in dollar terms), while imported goods (sugar, vegetable oil, etc.) are also marginally higher. The rise in staple price is contrary to the trend in more normal years, as the *Gu* harvest over the next month normally causes a decline. The districts with the worst crop failure, Qansax-Dheere and Berdale, are currently receiving FFW rations from CARE.

JUBA VALLEY

Overall, food security in the region is normal, with the good situation in the riverine areas offset by a crop failure in the rain fed areas in Hagar and Afmadow. The latter was caused by a dry spell during the critical grain setting stage of the crop. The riverine communities enjoy a substantial carry-over from off-season crops and a range of income opportunities are available to the poor, including those in urban areas. Livestock condition and production is good but herders have begun concentrating around permanent watering points like Afmadow and Dheshek since all inland water catchments have dried up. An influx of pastoralists from Gedo and parts of North Eastern Province in Kenya may create competition for pasture, water and markets and may result in over grazing. Cereal prices, although higher, are still affordable most households but imported goods are expensive.

BAKOL

The region has been dry this month and water shortages in the southern part are a problem. *Gu* crops have not performed well, due to moisture stress, but there will be some localised harvesting where a little rain had fallen during *Gu*. As elsewhere, the poor rainfall has affected grazing and hence cattle condition, but shoats and camel condition remains normal. Pastoralists migrating in from Gedo Region brought large herds of cattle but these have since moved on to the Shabelle valley within Region 5 of Ethiopia. Livestock to grain terms of trade have remained stable, but high prices for both have affected poorer wealth groups. There has been some migration of people out of the region to look for temporary labour. The number of IDP's at Rab Dhuure has increased and nutrition status levels appear to be slightly below normal, with WFP food going to households with malnourished children in Rab Dhuure, Xudur and Ceel Barde districts.

GEDO

The food situation for the rural poor in Gedo continues to be worrying, especially for the poor agro-pastoralist group. River levels dropped and the *Gu* rains' failure and the absence of *Hagaa* showers in the south precipitated some movement (mainly agro-pastoralists and pastoralists) down the Juba River. Due to previous crop failures, agro-pastoralist households (especially in the north) have very low food stocks. Harvesting is, however, going on in the riverine areas. Prices of staple are 10-15% (in Ssh) higher this month.

MIDDLE SHABELLE

The inland parts of the region did not receive any rainfall, while the coastal parts got the usual *Hagaa* showers. The river level rose slightly and water availability remains normal. Harvesting has started in both the irrigated and rain fed areas: sorghum is mostly out of the fields while some maize has started coming in but the bulk of the crop is still standing. The latter will suffer a loss in Yield rate due to aphid infestation. Areas that received rain have normal pasture but in those that did not, cattle condition has been observed to deteriorate somewhat. Shoaat condition is normal, as is milk and meat production. On the markets, prices of cereals went up as supply decreased, while the price of imported items went up in tandem with the cost of dollars. Livestock to grain terms of trade worsened.