



FEWS NET

Monthly Food Security Report



Food Security Analysis Unit

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EDITORIAL

Concern continues to mount over the poor performance of rain-fed crops in the agricultural production areas of Hiran, Gedo, Bay and Bakool regions. The total projected sorghum production is far from average (-60%). Analysis, however, shows that among the communities who place the most emphasis on farming in those affected areas, just under half of all families will still have sufficient access to food until the next *Deyr* harvest as substantial stocks of grain have been carried over from the 2000 cropping seasons (*Gu* and *Deyr*). The other half of the population, represented by the 'poor' wealth groups within the agro-pastoral food economies, are obviously more vulnerable (about 340,000 people in the 4 above-mentioned regions). This portion of the population (whose food stocks are depleting rapidly) will nevertheless be able to survive by switching and adapting their income and expenditure patterns towards purchasing grain. This is made possible by the still comparatively low grain price—a factor that may substantially change for the worse in the near future. Families who have a greater emphasis on livestock rearing are currently better placed in terms of food security, although threats from price shocks and poor pasture are rising. Income opportunities in riverine areas continue to be available and this remains a viable strategy of last resort for the vulnerable 'poor' wealth groups. As opposed to sorghum, the *Gu* cropping season for maize is taking place along the rivers without any major constraint and the overall production is expected to be good (with the exception of rain-fed maize in Lower Shabelle due to lack of water). Finally, the situation in Gedo is still one of great concern due to a combination of factors (several bad seasons, asset depletion and insecurity related problems, low stocks, high dependence on Bay/Bakool sorghum production). Early signs of potential crop failure in most rain-fed areas of southern Somalia have prompted an intensification of nutrition surveillance activities in these regions.

Food Security Highlights

- **RAINFALL :** In southern Somalia poor *Gu* rainfall has badly affected agro-pastoralists in Gedo, Bay , Bakool as well as Hiran. In Northern Somalia, the *Gu* season has brought poor rains to most areas, with the exception of Sanag and Bari regions. The early arrival of the windy *Hagai* season has accelerated an early drying up process.
- **WATER SITUATION:** Water catchments are already drying up in the pastoral areas most affected by the very poor *Gu* rains. Water availability for human and livestock consumption is abnormally low in Bay and will also become below normal in Bakool, Gedo as well as in Mudug and Nugal.
- **LIVESTOCK MIGRATION :** In northern Somalia, livestock migrations are taking place within the *Hawd* eco-zone and Ethiopia indicative of the poor rains. Livestock from Kenya migrated to Juba valley in search of better grazing areas putting pressure on the natural environment. There is movement from Gedo to Bay/Bakool, due to insecurity and lack of pasture.
- **LIVESTOCK SALES :** In southern Somalia, pastoralists have returned from the Kenya market where livestock prices have dropped significantly. Cattle prices in Garissa market dropped sharply resulting in a significant decline of price in Juba valley's local markets (by 20-25%). In northern Somalia, high livestock sales are predicted for the coming months, threatening normal re-stocking and sustainable herd sizes for the poorer pastoral wealth groups. The lifting of the ban by UAE has had a limited positive impact on the Somali livestock economy.
- **LIVESTOCK PRODUCTS :** Good camel milk production is and will make a significant contribution to food and income levels over the coming months, providing a critical buffer to the harsh economic conditions in northern Somalia.
- **RELIEF FOOD PIPELINE:** Considering the on-going livestock ban, the continuous devaluation and the poor crop prospects in large parts of southern Somalia, CARE and WFP are expecting that they will need to increase their distribution allotments. In addition to the food currently in the pipeline, both agencies have appealed for increased pledges in food relief.
- **CROP SITUATION:** After the generally good *Gu* and *Deyr* previous harvests, poor prospects have been predicted from FSAU's crop establishment assessment in most rain-fed areas of Gedo, Hiran, Bay and Bakool. According to the best case scenario, the total projected sorghum production will not exceed 36,000 MT (compared to 86,000 MT in average). On the contrary, a good maize production is expected from irrigated areas in the Juba and Shabelle valleys.

FSAU Analysis Open Day

With the technical assistance of the Food Economy Group, an open forum discussion day on food security analysis will be conducted by FSAU Nairobi on Thursday 19th July. The purpose is to enhance FSAU user understanding of the Household Food Economy Spreadsheet as the reference analytical tool. The day will particularly reflect the current food security situation in southern Somalia until the next *Deyr* harvest. Different scenarios will be considered, based on the crop establishment survey findings and the coping mechanisms specifically engaged by each of the food economy zones. If you are interested in attending the open forum discussion day, please contact the FSAU Communications and Information officer : alex.Williams@fsau.or.ke, Telephone: 745734, 748297, 741299 or Mobile 0733 616 881.

Nutrition Update

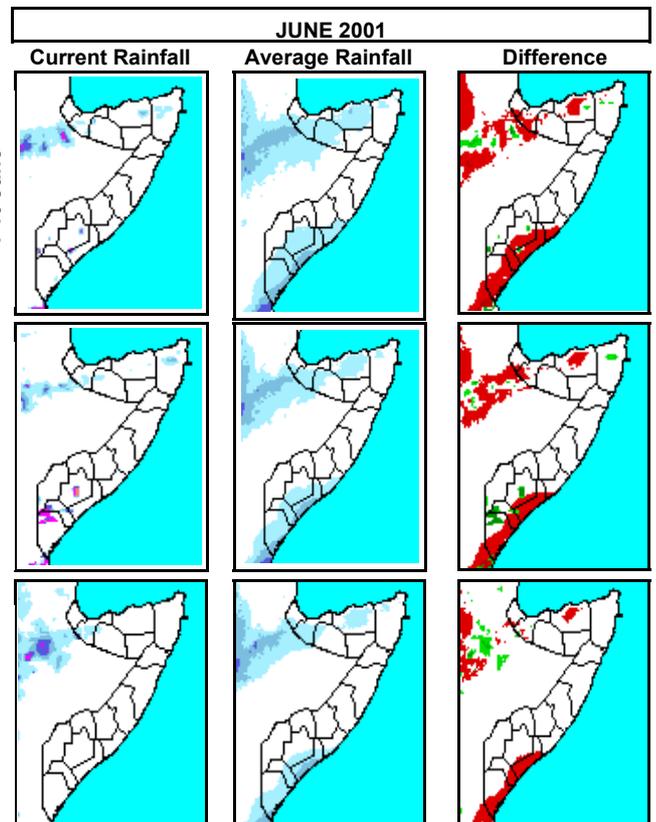
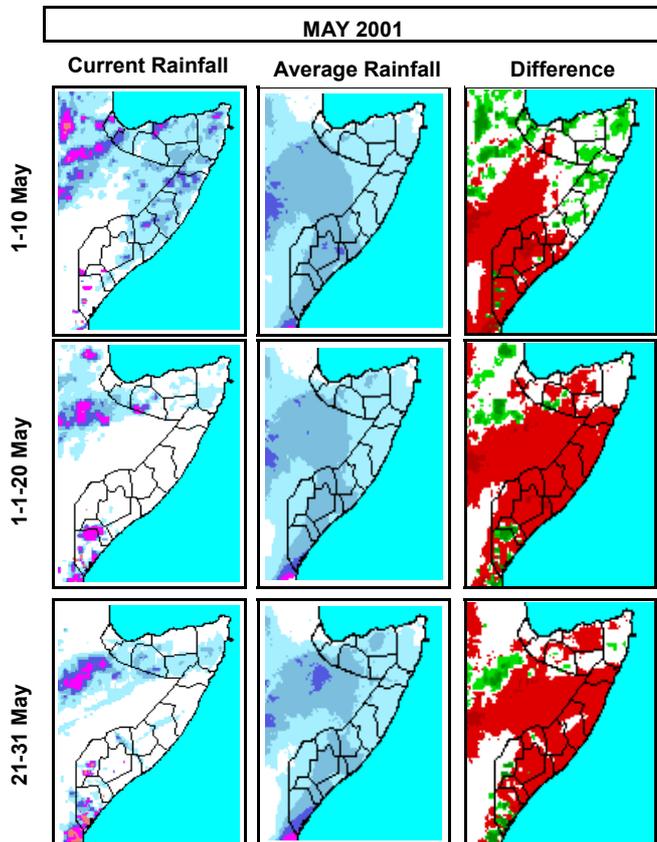
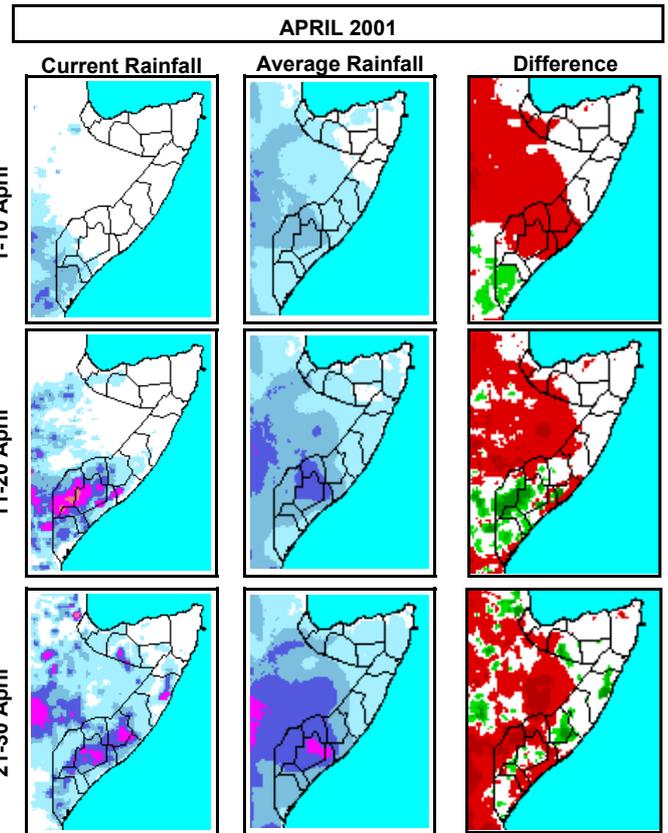
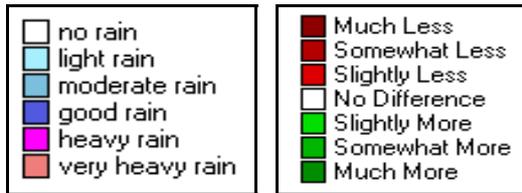
UNICEF Somalia has released the full technical report of the 'End Decade Multiple Indicator Cluster Survey', which presents data on the nutritional status and other indicators affecting the health and well-being of women and children. The following figures represent combined data for Somaliland, Puntland and South & Central Somalia. Among under-fives, the underweight prevalence is 26% (reflecting both acute and chronic malnutrition), the stunting prevalence is 23% (chronic malnutrition) and the wasting prevalence is 17% (acute malnutrition). Breakdown and interpretation of figures is presented in the July edition of the FSAU 'Nutrition Update'. *The report of the Hargeisa nutrition survey will be available before the end of July.* The separate FSAU monthly publication '*Nutrition Update*' is available from noreen.prendiville@fsau.or.ke or info@fsau.or.ke

REMOTELY SENSED RAINFALL : GU 2001 SUMMARY

In these images, remotely sensed rainfall from April to June 2001 (Gu season) are compared with the long-term average rainfall over a sixty year period. The difference between the two indicates whether the current rainfall (or absence of it) is almost the same (white), less (range of red colours) or more (range of green colours) than the historical records.

In April, rainfall was slightly less than average in most of the agriculturally important regions of Somalia. Nevertheless, many rain-fed farmers succeeded in planting their crops with the slightly more than average rainfall of April in Gedo, Bay, L. Juba and M. Juba. Later, the virtual absence of rainfall in large parts of southern Somalia during May and June caused widespread crop failure in the rain-fed areas of Bay, Bakool, Hiran, Gedo. At a later stage, rain-fed maize in L.Shabelle was also affected by lack of precipitation. The rainfall situation has generally been better in M.Shabelle, L. and M. Juba though June's rainfall was also considered as below normal in the coastal areas of southern Somalia. In the north, slightly less than average rainfall was observed in the agricultural areas of Somaliland. Reports from the field largely confirm this rainfall pattern.

As a result of these poor and patchy Gu rains, pasture and water catchments are rapidly drying in most affected areas. Under these circumstances, *hagay* showers (July-September) and short *karan* rains (July-August), which usually occur in the coastal areas of southern Somalia and north-western regions of Somaliland respectively will be crucial for the pasture regeneration and crop production. In preparation of the next *Jilaal* season, the *Deyr* rainfall (Oct. - Dec.) will also be determining. FSAU and FEWS-net Somalia will closely monitor the situation.

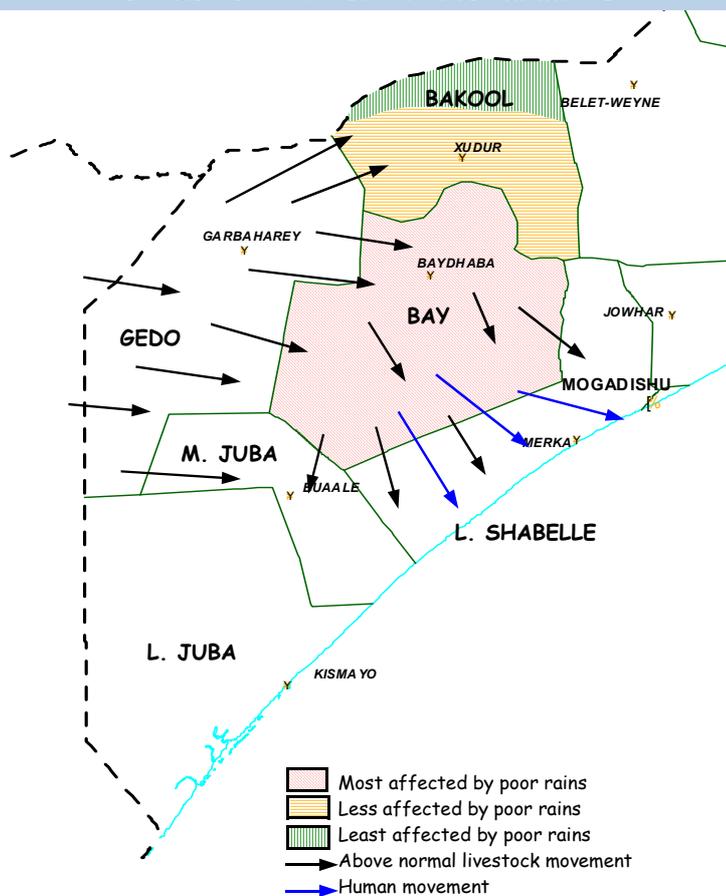


THE EFFECT OF POOR GU RAINFALL ON PASTORALISM IN BAY & BAKOOL

Over many hundreds of years, Somali society has developed a pastoral economy that has made good use of its limited natural resource base. Within this pastoral economy, Somalis fit into two defining groups. The first group are pure pastoralists, depending directly on livestock sales and livestock products. The second are agro-pastoralists who derive a significant part of their food intake from agricultural products, using livestock and their associated products to obtain additional income. Livestock therefore forms an asset base from which households draw on in times of stress. The sale of livestock products and live animals will usually increase during harsh times. (Slaughtering the animal for household consumption is a last resort and is not an efficient way of deriving calories.)

Pastoral production requires mobility and flexibility in order to ensure optimal utilization of natural resources. Given the precarious natural environment, units of pastoral production have always been widely dispersed to avoid resource depletion. During normal *Gu* and *Deyr* rainy seasons, grazing and browsing are plentiful and households are widely dispersed. However, when rains fail, (or during the dry season, *jilaal*) pastoralists concentrate in areas where there is good pasture and where they can find water. Where there is a heavy concentration of pastoralists, competition for livestock sales increase together with the demand for grain, causing deterioration of the terms of trade. When analyzing the food security situation of agro-pastoral and pastoral populations, essential components to examine are, the share of pastoral activities within the household's baseline income, the expandability of livestock products and animal sales and the sustainability of a herd size. (Population density can also suddenly increase in a pastoral area depending on the level of harmony or conflict within the region.)

LIVESTOCK & HUMAN MOVEMENTS



BAKOOL REGION

Livestock and crop production has been adversely affected by poor rainfall in Bakool region. *Gu* rains were particularly unsatisfactory in the high potential sorghum production area of Bakool. Households who have reserve cereal stocks are not selling. There is a shortage of water for both animal and livestock consumption. Livestock condition is now below normal, especially for cattle and sheep. Additional pressure has arisen in Bakool as pure pastoralists have migrated in, to avoid poor security and declining pasture in neighboring Gedo where poor rainfall was also reported. There has also been a large influx of animals from Kenya, where livestock prices have dropped significantly. Flooded markets in Garissa (cattle) and Mandera (sheeps) have caused livestock traders to flood markets in the region. This has resulted in a drastic decline in prices. (Currently, no trade association provides structure or regulations for livestock supply and demand in markets).

BAY REGION

Scattered, low intensity rains have been reported throughout this *Gu* season in Bay region. Water availability for both human and livestock is decreasing as water catchments are already drying up. There is widespread crop failure due to lack of water in the agro-pastoral areas of Bay. This will not only result in reduced cereal production, but will also cause a substantial reduction in related agricultural employment. The daily income of the poor wealth groups will consequently be affected. People have already started moving to Mogadishu and L. Shabelle region in search of alternative income sources. Farmers who have stocks are limiting their sales to the bare minimum driving up cereal prices. Although terms of trade for cereals/local goat are actually depreciating, they are still much more favourable than one year ago.

CONCLUSION

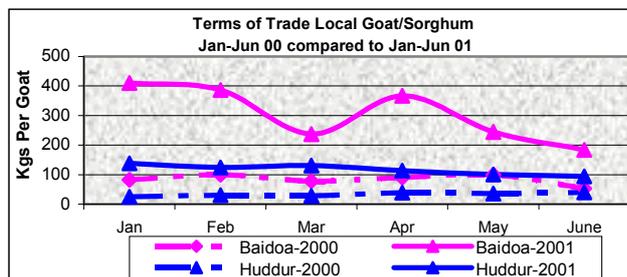
The current food security situation is not yet alarming but it certainly needs very close monitoring. Following the poor *Gu* rains, the key factors of food security in Bay/Bakool can be summarized as follows:

- Poor pasture in Bay region and parts of Bakool region.
- Very poor *Gu* 2001 cereal harvest prospects in Bay/Bakool.
- Lack of water for both human and livestock consumption, especially in Bay region (water availability in Bakool is near normal).
- As a result of the previous good *Gu* and *Deyr* sorghum harvest, agro-pastoral better-off and middle wealth groups have cereal stocks that will take them past the next *Deyr* season.
- Cereal prices are still relatively low (expressed in Somali currency, sorghum prices are much lower than last year at the same period, and even lower when converted in USD).
- Livestock prices will most likely be affected by high in-migration of livestock to both Bay and Bakool (negative impact on TT)

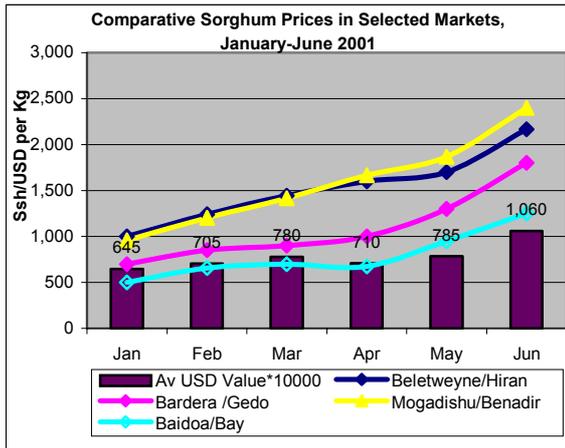
Overall, agro-pastoralists in Bay region have been more affected by the poor rains than pastoralists in Bakool. The inescapable increase in cereal prices will undoubtedly affect the poor wealth groups that may run out of stocks shortly after harvest time.

TERMS OF TRADE GOAT/SORGHUM (TT)

TT are gradually depreciating in Huddur, Bakool's main market (from 130 kg of sorghum per local goat in March to 94 kg in June), but are still more favourable to goat sellers than last year (40 kg in June 2000). In Baidoa, TT dropped from 370 kg to 185 kg between April and June. As in Bakool, TT are still much higher than last year at the same period when they were in the range of 50 kg due to higher sorghum prices.



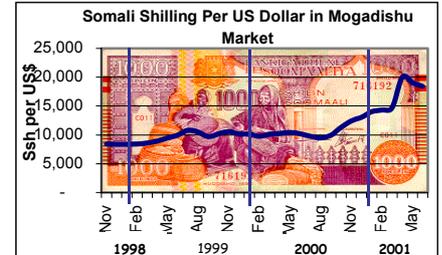
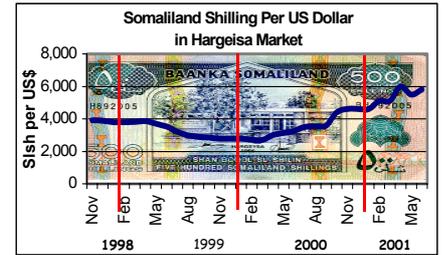
LOCAL CEREAL PRICES



With the relatively high price of imported food, demand for local cereals has increased, pushing up the price of staple food commodities in most reporting markets. In average, **sorghum** increased by almost 30% over last month's level in **southern Somalia**. Sorghum prices, which were particularly low after the last Gu 2000 harvest, are gradually increasing since the beginning of the year (see graph on the left). However, in the sorghum belt, the increase in price only became significant in May/June (from 800 Ssh/kg in the first week of

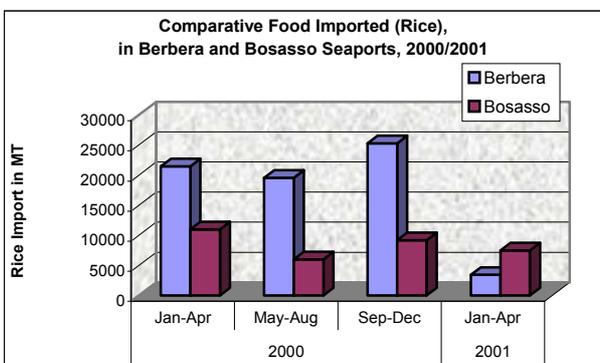
May to 1,500 Ssh/kg at the end of June in Baidoa). A similar increase was observed in Bakool where prices are usually slightly higher than in Bay (1,600 Ssh/kg in Huddur market in June). Prices in Bay/Bakool are still much lower than last year during the same period (prices then reached approximately 2,500 Ssh/kg in both regions), and even lower when converted in USD (0.07 USD/kg in June 2001 compared to 0.25 USD/kg in June 2000). The price trend actually reflects the devaluation more than a low market supply. Indeed, there was no significant increase in the value of sorghum during the first five months of the year when converted in dollars (see graph). The average sorghum price was maintained in the range of 0.06-0.08 USD/kg between January and May and went up to 0.10 USD in June (calculation based on 4 main markets). In Bay region, most households still have cereal stocks and the market is normally supplied. However, poor prospects for the 2001 Gu harvest will place further strain on local cereal prices in the neighboring regions. In southern Somalia, the highest sorghum prices were found in the Juba valley and in Mogadishu (close to 2,500 Ssh/kg). In **northern Somalia**, local cereals are now cheaper in the northwest (3,000 Ssh/kg and 1,000 Ssh/kg for sorghum respectively in Burao and Hargeisa) than in the northeast (5,000 Ssh/kg of sorghum in Bossasso and Garowe). In Bossasso, the price of the 50 kg sorghum bag of rose from 150,000 Ssh to 170,000 ssh due to low supply and relatively high demand. **Maize prices** have increased between February and May. In June, prices did not increase further in Mogadishu (stabilization at 2,300 Ssh/kg) and in Gedo region (2,500 Ssh/kg in Luuq). In expectation of a good Gu harvest, prices in Jowhar (M.Shabelle) slightly decreased (-10%). On the contrary, maize prices in Baidoa, which were the lowest so far in Somalia, rose from 1,000 Ssh/kg beginning of May to 2,000 Ssh/kg at the end of June. As for sorghum, the highest prices were found in Lower Juba (from 3,500 Ssh/kg in Afmadow to 4,500 Ssh/kg in Kismayo). As opposed to sorghum, maize prices expressed in Somali currency are significantly higher than last year at the same period. Conversely, due to the devaluation, maize is still cheaper than last year when prices in dollars are considered (0.12 USD/kg in June this year compared to 0.17 USD/kg in June 2000 in Mogadishu).

EXCHANGE RATE



The Somali shilling has steadily strengthened in most urban markets in June, due to the low seasonal trend activities as well as the Transitional National Government auctions. After receiving economic assistance from Saudi Arabia, TNG has started auctioning US dollars in Mogadishu's main Bakara market, in an attempt to raise the value of the shilling against the dollar (the total amount so far auctioned is about US\$1,000,000, between 31 May and 11 June 2001). This indirectly influenced the market prices of imported food and non food items. In Mogadishu, the Somali exchange rate decreased by 3% from Ssh 19,000/US\$ in May to Ssh 18,400/US\$ in June (last year at the same period it was just slightly above Ssh 10,000/US\$). As expected, the lifting of the ban by the UAE has had a very limited positive impact on the Somali livestock economy. After having appreciated from April to May (+9% in Hargeisa), the Somaliland shilling again lost value in June (Ssh5,800/US\$, -5%).

IMPORTED FOOD COMMODITIES & PORT ACTIVITIES



Source: UNCTAD

ports for the period January 2000 to April 2001). In the first quarter of the year, rice importations decreased from 32,500 MT in Jan-Apr 2000 to 11,000 MT in Jan-Apr 2001 (-66%). A similar trend was also observed for other commodities. As a result, supplies of imported commodities sharply decreased (sugar, rice wheat, flour and non food items). Due to high maintaining prices, imported food commodities are difficult to access for the poorest fraction of the urban population. Agro-pastoral and pastoral consumers outside of urban markets are facing even more difficulties in accessing imported commodities. Consumption of costly imported foods is reduced in favor of lower cost domestic staples. Around Mogadishu, prices increased by an average of 15% in one month. Prices for imported commodities in more distant markets (Bay, Bakool, Gedo) have increased by as much as 20%.

FOOD AID DISTRIBUTION

Food pipeline: Taking into consideration the foreseen implications of a combination of adverse factors (livestock ban, inflation, poor rain-fed crop projections), **CARE** and **WFP** have indicated that there is currently insufficient relief food in the pipeline to cope with dwindling local food stocks over the next few months. Both agencies are expecting that they will need to increase their distribution allotments to areas most affected. CARE has appealed for 12,000 MT of food in addition to the food currently in their pipeline (about 5,000 MT). Almost half of the food operations planned by CARE in the next six months would take place in Gedo. Similarly, WFP has about 5,000 MT in the pipeline and has recently appealed to donors to pledge 20,000 MT of food to enable them respond to anticipated needs over the next 12 months.

Actual distributions: Following the generally good previous harvest (*Gu* & *Deyr*), the

level of food interventions has been slightly lower in the first half of 2001 compared to last year. In May, **WFP** distributed about 418 MT in the form of FFW and social support in southern Somalia (including 200 MT in Benaadir region). WFP also distributed 84MT to the Northeast regions and about 300MT to the Northwest regions. In June, WFP provided maize through Maternal Child Health Centres in Bakool region. CARE distributed Food For Work to stabilize food prices in Tieglo district, (Bakool region) where poor rains have led to reduced water availability and bad crop prospects. In June, **CARE** distributed 320MT in Hiran region (Jalalaqi and Belet Weyne districts), 240MT in Bay region (Baidoa and Q/Dhere districts), 120 MT in Bakool and 40 MT in M.Shabelle region, all this in the form of FFW. Free food distributions went on in Gedo region (640 MT in El Wak, Bulohawa, Dolo, Luuq, Gedweyne districts).

HEALTH

Thus far, the annual **cholera** outbreak has generated less than one quarter the number of cases recorded last year. If this trend continues, it will be the mildest outbreak since 1994. Since 1 January, a total of 1,588 cases and 115 deaths have been recorded, leaving an overall Case Fatality Rate (CFR) of 7.2 percent. No significant changes in other key pathologies – including kala azar, measles and malaria – were reported.

The number of reported **rabies** cases in Mogadishu has reduced, while **meningitis** surveillance has been enhanced in light of the continuing outbreak in Ethiopia.

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

NORTH WEST & ADWAL

For pastoralists and agro-pastoralists the recently ended *Gu* rains have not proven adequate to generate good pasture or crop conditions. Full seasonal recovery of livestock body condition is therefore not expected, particularly for cattle and small ruminants. This is also a reflection of the prolonged *Jilaal* season and high livestock movements then. As in recent years, poor *Gu* rains have created poor early crop expectations. Harvests now depend on the mid-season *Karan* rains, which have themselves been good in recent years. Poor economic conditions and little tillage assistance have also contributed to the low area under cultivation and poor harvest expectations. The only areas receiving tillage assistance this year are Baligubadle, Garabis and Sheikh. For urban households in Hargeisa a recent ban on the construction industry created additional hardships on top of the increased difficulties caused by the livestock ban and inflation. There are indications that the ban on construction will soon be lifted.

SANAG & TOGDHEER

Gu rains were near normal in virtually all of Sanag region and the mountainous areas of Togdheer region. Improved livestock conditions, productivity and value should therefore temporarily lessen the worst effects of the current economic constraints. In parts of the *Hawd* of Togdheer rains have however been poor. Research also suggests that livestock sales are higher than normal, in order to make up for income lost from the livestock ban. The sustainability of herd sizes for poorer groups is therefore in question. High migration levels are taking place currently in all *Hawd* areas, giving concern for pasture and browse availability in the future. Approximately one third of the agro-pastoralists were not able to cultivate their land adequately due to lack of inputs and poor *Gu* rains. Strong *hagai* winds are also drying out vegetation and crops. Urban activities are slow with limitations on construction activities as well as the ban and inflation. Remittances continue to be a key coping option.

BARI

Given the economic constraints, food access is good for most groups. The groups of greatest concern remains the poor urban and IDP groups in the main towns, especially Bosasso. *Gu* rains have significantly enhanced the livelihood of the pastoral population. The vast majority of *berkaads* have been refilled. Camel lactating levels are good for food and income generation. The lifting of the livestock ban by the UAE has generated some livestock export sales and related employment but the effect is limited due to demand being in a seasonal low as well as high seas limiting port activities. Most of the exported animals are coming from Mudug, Sool and Hiran regions. Uncertainty exists that pasture and browsing might not last. Reduced availability of local cereals and relief foods due to low supply is also threatening the food security status of poor households who are consuming these items.

NUGAL & S-BARI

Preliminary indications that light, patchy *Gu* rains may cause over exploitation of natural resources (vegetation) in some areas in the coming months. Prices have stabilised this month compared to last, with particular benefit to pastoralists. Milk production has increased as expected with significant benefits in terms of food and income. The lift of the livestock ban in the UAE is not having a significant impact, as expected. The rate of inflation appears to have stabilised this month compared to last – for example prices of food commodities did not rise and some fell.

SOOL

Gu rains are widely believed to have been the worst in the last 6 years. In neighbouring areas in the *Hawd* of Ethiopia rains have also been very poor causing large-scale livestock migration. Concentrations of animals and pressure on water and pasture resources are already noted. Normal seasonal recovery of livestock and human health conditions are therefore under serious threat. Water prices have doubled in border areas, where poor pastoralists have to buy water. Relatively high camel lactating/milk levels are the main mitigating factor against worsening food security conditions. Higher levels or animal sales are also taking place, but limitations will soon be reached in terms of re-stocking potential. Greatest concern in the coming months is for the poor wealth groups of the following food economy groups: sheep herders of the Nugal Valley, and pastoralists of the *Hawd* and Sool plateaus.

SOUTH NUGAL & NORTH MUGDUG

Generally, rains in the *Gu* season were poor especially in volume. Water and pasture problems could develop in some areas in the coming months. Huge livestock migrations are already taking place within the *Hawd* areas of Ethiopia and Somalia. This worsens the impact of the existing problems of the livestock ban and inflation. Goldogob and surrounding villages stand out as the main area of concern, with the poorest rains following previous poor seasons. Asset levels are already low in this area. Urban in-migration is taking place in search of jobs. Cereal prices have slightly increased. Some livestock marketing activities (chilled meat and exports for the UAE) have given opportunities in Galkaio. Relief food supplies distributed in zone-5 of Ethiopia filters in to the nearby rural villages around the border. Research indicates that poor pastoral households are likely to sell increasing amounts of livestock in the coming months, threatening sustainable herd sizes and potentially accelerating destitution.

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

The southern parts of Gedo Region have experienced a large influx of livestock, mainly cattle and camels, this month. This is attributed to livestock traders returning to Somalia from Kenya (where the price has recently fallen) and to pastoralists seeking better pasture near the Juba river. Livestock condition around Baadheere is still normal, although prices have dropped. Pasture in the northern parts of Gedo is poor and there are reports of overgrazing, this part region has also seen some insecurity. Livestock condition and production is said to have deteriorated markedly. Crops in the rain fed areas have failed but those in the irrigated areas along the river are fairing better; although fuel prices have affected irrigation and consequently maize harvests may be impaired. Overall, poor pastoralist and agro-pastoralist families appear to be the most vulnerable groups at present.

HIRAN

There has been no rainfall in Hiran during the month of June, while heavy Hagai winds have continued drying out vegetation. There has been some migration of cattle owners out of the region to seek better pasture. Cattle condition has deteriorated and they are now producing a lower milk output than at the same time last year. However, the condition of camels and shoats remains normal. Along the river, the steady water level has not been exploited due to high fuel costs. The regional crop area is estimated at 3,900 Ha, which is far below normal. Rain fed crops did very badly, most of them failing at knee height due to moisture stress. Although small in area, the irrigated area along the riverbank has crops at standing height, which are free of pests and should produce a good yield for both maize and sorghum. There was a slight increase in cereal prices this month -10% higher than the same time last year. In view of the depreciation of the Somali shilling this actually represents a low price. Cereals are being brought in from Ethiopia.

LOWER SHABELLE

The level of the Shabelle River is normal and this has meant that in the riverine areas maize that was irrigated early is in good condition, while that which was on a more delayed schedule has not performed as well. A critical situation has developed for rain fed maize as there has not been enough precipitation during the flowering stage, which will most likely result in yields that are substantially lower than those projected during crop establishment. Sorghum condition is normal, however. There are limited opportunities for employment and many households engage in various forms of self-employment, notably the collection and sale of bush products, wild foods, vegetable production and petty trading. Overall cereal prices are slightly higher than last month, with the maize price remaining the same or even dropping marginally in some places, while the sorghum price has increased by 12%. There has been an influx of people from Bay Region although the scale is still not alarming.

BAKOOL

Bakool has suffered from very poor and irregular rainfall this *Gu* season, raising some concern about the implications for food security. However, the region appears to have received more rain than northern Gedo. Insecurity, coupled with poor rain has encouraged many pastoralists from Gedo to migrate into Bakool en route to Ethiopia. This has increased pressure on pasture and animal condition is now worse than normal. In addition, cattle owners have not been able to find a way of marketing their animals in Mandera, pushing the price down and placing an extra strain on resources. A near crop failure situation prevails in the agro-pastoral areas. The terms of trade remain good for pastoralists, except when trading commodities derived from self-employment. Grain prices have stabilised in Huddur but are higher than in Baidoa. Members of the poor wealth groups have travelled to Somaliland, Puntland and Ethiopia to look for work.

BAY

Bay Region continues to generate concern with the poor rainfall and crop establishment. The projected *Gu* harvest has been estimated at 15% of the post war average and this has forced poorer households to begin adopting coping strategies early on: to switch any grain sales to consumption, to partially switch dairy consumption to sales (which at present terms of trade brings in more calories), to maximise self-employment opportunities, and to seek employment in the Shabelle and Juba valleys. Agricultural labour opportunities within the region are still minimal. 'Middle' and 'Better Off' wealth groups have stocks from previous harvests, these will take them past the *Deyr* season or they will enable them to hire labour for the necessary replanting. Grain prices have risen but remain low relative to the inflation value. This benefits those selling livestock or livestock products. Bush products and the price of commodities from self-employment activities are extremely low as supply outstrips demand. Lack of water may lead to above-normal migration.

JUBA VALLEY

This region experienced good rains that have resulted in a normal crop condition, although Afmadow area experienced poor rains during the critical flowering period for maize. Due to low household food stocks, cereal prices are higher than elsewhere (Ssh. 100,000/bag for sorghum compared to Ssh. 60,250/bag in Baidoa). There has been an influx of livestock from North-Eastern Province in Kenya. The water catchments near the Kenyan border have dried up and livestock have moved to Afmadow where there is more permanent water. Despite the fact that livestock body weight and milk production is above normal, low seasonal demand in Kenya has kept the price of livestock down and worsened terms of trade for all agro-pastoral and pastoral groups. Riverine groups have good stocks, due to off-season harvests.

COWPEA BELT

The coastal areas of this region have received some showers but otherwise the weather has been cloudy and windy, which is normal. Crops are normal and the main farming activities of sowing, guarding and field fencing are all taking place. The heavy winds of the *Hagai* season and pests represent the biggest threats to crop production. Where rains have been good, pasture is available but there are some pockets where pasture capacity is weak. Nevertheless, livestock body condition and milk production is normal. There has been some exporting to the UAE, mainly cattle and shoats. Prices are rising, particularly for imported commodities because of the depreciation of the Somali shilling. Cereal prices have reduced slightly with the expected harvests and the livestock prices remain high, providing good terms of trade for owners.

MIDDLE SHABELLE

River levels are normal, although not high enough to allow gravity-fed irrigation and pumping, which depends on the availability and cost of fuel. Unlike Lower Shabelle, both maize and sorghum are doing well and farmers are carrying out the final weeding creating employment opportunities for the poor. Wealthier households have food stocks but those from the 'poor' wealth group are dependent on purchases made with earnings derived from labour or from self-employment activities. This is a normal situation for this time of year and does not reflect a deterioration in food security. The availability of maize and cowpeas has pushed down the price of these two commodities somewhat and the slight strengthening of the Somali shilling has done the same for imported commodities. Good pasture and improved livestock prices have benefited pastoralists.