

FSAU REPORTS AND ACTIVITIES

** The FSAU FOCUS "2002 *Gu* Season and Food Security Implications" will be disseminated via e-mail and distributed to FSAU users in mid-November. Copies will also be available at FSAU offices from alex.williams@fsau.or.ke

**The field work for the FSAU Belet Hawa Nutrition Survey with partners was carried out between 18-24 October 2002. Preliminary information and analysis is available in the October Issue of Nutrition Update.

** Eleven FSAU Field Monitors and two representatives from SC-UK Ethiopia and SC-UK Belet Weyne participated in a "Training to Train" Nairobi workshop during October which has improved FSAU's Household Economy Analysis training capacity within Somalia.

**FSAU's main role in Somalia is vulnerability analysis. To assist partners make better use of FSAU information to enhance their own vulnerability analysis, FSAU is planning to hold household economy analysis (HEA) training in December 02/January 03 in Somalia. Numbers are limited but if your organization is interested—please contact : lesley.adams@fsau.or.ke

FOOD AID DISTRIBUTION

In Gedo region, during October, CARE distributed a total of 780 MT in Dolo district. This consisted of 630 MT of sorghum, 126 MT of lentils and 23 MT of vegetable oil. Currently, food distributions are on-going in Belet Hawa district and distributions in El-Waq will follow. Tensions in Luuq district continue and this is making food distributions difficult. For further information on CARE's food aid operations, please contact : narayan@care.or.ke.

FSAU are unable to provide information on food distribution carried out by WFP for the month of October.

HIGHLIGHTS

Gedo Region : The nutritional improvements seen in a recent survey conducted in Belet Hawa district are closely attributed to the level of relief food interventions. However, the difficulty of recording changing population figures, mortality rates and population movements continues to present obstacles in estimating future needs and interventions.

Food Security in Sool Plateau Improves : There has been erratic and patchy rainfall on the Sool Plateau, however, FSAU Field Monitors' report that *berkads* are almost full so poorer pastoralist households are not having to spend large amounts of their income on the purchase of water. There has also been some improvement in pasture. However there are still pockets (Sool of Eastern Sanag and Sool of Taleh district) which didn't receive rain and these need to be monitored closely in the coming months.

Heavy Rains Fall in Belet Weyne (Hiran Region): Heavy rain fell throughout Belet Weyne district between 21–27 October. This has enabled farmers to plant their crops. Pasture has recovered. Livestock have returned to traditional grazing areas and many of the agro pastoral families who had previously been separated have been reunited. There are reports of poor rainfall in Gode and Mustahil in Ethiopia. This has resulted in some animal herders moving their livestock into Belet Weyne district. Reports from the region have recently suggested that two livelihood groups were becoming increasingly vulnerable—agro pastoralists who had been forced to separate from their families and poor riverine farmers who had no access to irrigation pumps. The recent good rain, reuniting of families and increase in milk production/availability has improved the situation of the two groups, although they are still likely to experience hardship.

Implications of Restrictions imposed by Ethiopia on Cross Border Trade with Somalia : In early October, Ethiopian authorities closed its border with Somalia, reportedly to reduce smuggling of untaxed foods and improve revenue collection. The Ethiopian government has imposed heavy taxes on goods coming in and going out of the country. Traders and business people involved in the cross border trade are required to have an import/export license and register their trade, often a tedious process. Accordingly, Ethiopia has established several checkpoints along the border and prevented the movement of goods and services entering and leaving Ethiopia without formal documentation and taxation. Both food and non-food commodities have been affected. For implications for Somalia's food security—see page 2.

Highlights from the FSAU 'Nutrition Update'

During October, FSAU led an interagency nutrition survey in Belet Hawa District of Gedo Region. Preliminary results indicate malnutrition rates that are extremely high by any standards but which nevertheless represent a significant reduction in comparison to the previous survey ten months ago. The extent to which this improvement is related to the substantial current humanitarian interventions is currently being analysed. *Initial analysis also suggests extremely high mortality rates in the district.*

In response to concerns about populations in riverine villages of Middle Juba, a nutrition assessment was undertaken which confirmed the existence of a serious problem. The assessment report also describes the short and longer term interventions now in place.

In Hiran, assessments were undertaken in two districts affected by the recent crop failures. The results are likely to be useful in determining the vulnerability of these populations.

Preliminary results of the recent nutrition surveys in Rabdure District and Bari Region are now available.

A summary of the FSAU Nutrition Project *Food utilisation study* is presented in the latest Nutrition Update. This presents some interesting information on food and eating habits that affect nutrition in Somalia and requests for the full report will be welcomed.

For copies of nutrition survey reports and further information related to nutrition, see the FSAU monthly publication 'Nutrition Update' or contact nooreen.prendiville@fsau.or.ke



ETHIOPIA IMPOSES RESTRICTIONS ON CROSS BORDER TRADE WITH SOMALIA

Context

Somalia shares a very long border with Ethiopia. Over the years, especially since the regimes in Ethiopia and Somalia changed in the early 1990s, there has been an active flow of people, animals and goods between the two countries, much of it unregistered and unofficial. Moreover, the establishment of the Somali refugee camps just inside Ethiopia's Zone V (Somali Region), like Harta Sheik, Daroor, Dulad, Bali Yarey, Dharwanaaje, and Awbarre, created more demand for products from north west Somalia and enhanced cross-border trade between the two countries. Somali traders import food and non-food commodities from the Persian Gulf States and have built warehouses at border crossing points, such as Awbarre, Togwajaale, Buhodle. Ethiopian traders, on the other hand, supply mainly food items, including coarse grains (maize, wheat, sorghum), potatoes, assorted vegetables, and milk as well as *khat* and charcoal. This cross border trade created livelihood sources through trade and employment for the population of the two countries, especially those along the border. Pastoralist, agropastoralist and urbanites are the main food economy groups that have benefited most from this trade, directly and indirectly. Food availability and accessibility has been good for many years, thanks to this Somalia/Ethiopia border trade.

What is happening

In early October, Ethiopian authorities closed its border with Somalia, reportedly to reduce smuggling of untaxed foods and improve revenue collection. The Ethiopian government has imposed heavy taxes on goods coming in and going out of the country. Traders and business people involved in the cross border trade are required to have an import/export license and register their trade, often a tedious process. Accordingly, Ethiopia has established several checkpoints along the border and prevented the movement of goods and services entering and leaving Ethiopia without formal documentation and taxation. Both food and non-food commodities have been affected.

Implications

Generally, the restriction of trade has greatly reduced the availability

inside Ethiopia of a wide range of food and non-food items, including staple foods. Consequently, the effect of the restriction is felt inside Ethiopia more than in north west Somalia in the short run. Within north west Somalia, however, availability and accessibility of certain commodities has fallen significantly. For instance, milk availability decreased in urban areas of Hargeisa, Gabiley and Borama due to export restrictions on the Ethiopian side. Milk prices therefore increased about 35% between September and October. Coarse grain prices of sorghum, maize and wheat also increased about 30% during the similar period. In addition, prices of pulses increased about 14%. Ironically, most of the cowpeas, mung beans, sorghum and some maize comes from Southern Somalia across Ethiopia. Somali traders are now forced to use the longer route via Galkayo to Burao to Hargeisa. Prices of all these staple commodities are expected to increase further as higher transportation costs are transferred to consumers. Prices of different commodities imported from the Persian Gulf states, such as rice, sugar, spaghetti, edible oil and non-food items, however, remain same throughout Somaliland. Trade of *khat*, a growing economic sector, was not affected by the restriction of trade flows.

Conclusion

The current restriction of trade flow between the two countries will undermine employment and income-earning options along the border. In turn, this will weaken the purchasing power of large number of people in north west Somalia. The most affected population categories are those from urban and agropastoral food economy groups, which used to benefit from the informal cross border trade, directly and indirectly. Poor and middle wealth groups among those food economy groups will be the worst affected in the short-term. This unexpected restriction of trade flow will be another blow to the already fragile economy of north west Somalia, which has been affected by the livestock trade ban. Close monitoring of price changes and changes to livelihoods and food access will therefore be needed.

2002 GU AND KARAN CEREAL HARVEST IN SOMALILAND

Overview

The FSAU seasonal crop harvest assessment was carried out in Somaliland between 16 October – 4 November 2002. FSAU, FEWS NET, Danish Refugee Council (DRC), International Rescue Committee (IRC), and the Ministry of Agriculture participated in the exercise which covered the entire agro-pastoral districts of Hargeisa, Gabiley, Borama, Burao and Odweine. During the assessment, staff of NGOs, farmers and key informants, were interviewed and field visits were made to assess the crop and livestock situation. Moreover FSAU met representatives of aid agencies working on agricultural recovery programmes in Somaliland and discussed the season's performance, as well as looking at assistance provided to farmers and examining other major farming constraints. These included IFAD, German Agro Action (GAA) and, Agricultural Development Organization (ADO).

The Crop Cycle

The normal cropping pattern in Somaliland commences with a sorghum crop (which takes 6 months to mature) and maize which is on a shorter cycle of 3 months - both are planted as a mono-crop at the beginning of the *Gu* season (April-June). After harvest of the early maturing *Gu*-maize, another early maturing *Karan*-maize is planted on the eve of the *Karan* season (end July-September). The purpose of the *Gu*-maize is to get relief from hunger before the sorghum cycle comes into being again.

Rainfall

Rainfall during the *Gu* season was extremely poor for both sorghum and the early maturing maize. It affected normal sorghum establishment. Moreover, the *Gu*-maize failed because of extreme moisture stress.

Karan rains restore hope in Somaliland

However, the exceptional *Karan* rains restored hope to the agropastoralists in Somaliland, particularly in Hargeisa, Gabiley and Borama districts. The *Karan* rains restored growth of the sorghum and encouraged the *Karan*-maize planting. A common feature found in the districts of Hargeisa, Gabiley and Borama in the 2002 *Gu* and *Karan* seasons has been the achievement of two harvests (*Gu*-sorghum and *Karan*-maize) instead of three (as the *Gu*-maize failed). The *Karan* rains significantly restored the moisture deficit suffered by the *Gu*-sorghum hence sorghum re-gained better growth after mid-June.

Yield Achieved

An estimated area of 24,523 Ha (78% sorghum and 22% maize) has been harvested. Yield/ unit area has been estimated in the range of 0.3-0.4Mt/Ha for the *Gu*-sorghum and 0.1-0.2Mt/Ha the *Karan*-maize.

The total cereal harvest is estimated at 8,874 Mt (88% sorghum and 12% maize). However the total cereal harvest of the 2002 *Gu* and *Karan* is lower by 42% of the cereal production average of (1998-2001) *Gu* and *Karan*.

The *Karan* rains have improved tender leaves and grasses for cattle and shoats. The sale of livestock and livestock products will also help as a means of providing income to buy food. In mid *Gu* season many livestock emigrated to Zone V of Ethiopia to avoid the poor conditions. Abundant sorghum fodder, grasses and harvest residues of livestock feed are now available and are expected to last up to November and December 2002. Moreover, the total cereal harvest of the *Gu* and *Karan* is expected to be sufficient for a household of seven up to January 2003. For more information on the 2002 *Gu* and *Karan* Cereal Harvest in Somaliland—please contact FSAU Field Manager Yusuf Mohamoud. Yusuf@fsau.or.ke.

EMERGING FOOD INSECURITY IN THE TOGDHEER REGION AGRO PASTORAL FOOD ECONOMY ZONE. A VULNERABILITY UPDATE : SEPTEMBER 2002

With a population of about 350,000, Togdheer is one of the largest regions in Somaliland. The 1998 FSAU baseline study outlines that about 60% of the population are pastoralists, 10% agro-pastoralists and the remaining 30% are settled groups in the urban areas.



This vulnerability report focuses on the agro pastoral Food Economy Zone (FEZ) which lies at the foothills of the Golis Mountains which pass through the region (the area shaded purple in Figure 1). Pastoralists take advantage of the area's good grazing for livestock - and farmers practice rainfed cultivation and some irrigation using water run-off from the mountains. The agro pastoral food economy group is found in two districts of Togdheer region, Odweyne and Burao (spelled as Burco in Somali). The majority of the agro pastoralists in the region (70-80%) are found in Odweyne and the rest in Burao.

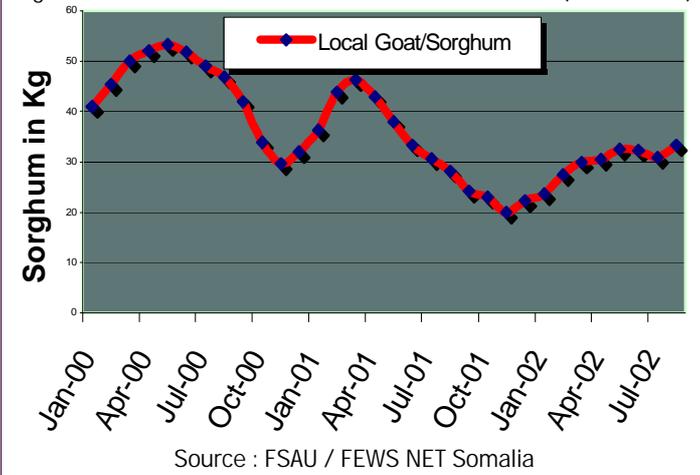
The livestock living in the area are sheep and goats with some cattle and camels (Table 1). Farming activities involve growing cereals (mainly maize and sorghum), pulses and assorted cash crops (mainly vegetables). These agro pastoralists produce fodder from flood-plain enclosures and sell it in the livestock market in nearby Burao town where demand is high. Burao has the largest and perhaps most active livestock market in East Africa.

Over the past 7-8 years, peace and stability in Somaliland have encouraged and eased the reintegration of a large number of returnees (mainly women-headed households) from refugee camps in eastern Ethiopia. Many returnees have adapted to agro pastoral activities because of newly acquired agricultural knowledge and skills - and readily available land.

Apart from livestock and crop production (including hay), this food economy group also engages in livestock trade and related employment to supplement their incomes. However, three consecutive seasons of poor rains have negatively affected livestock conditions and production. These poor rains have also caused crop failure and extremely poor fodder production. Moreover, in the surrounding *Hawd* grazing areas, pasture and browse were depleted due to overgrazing and general environmental degradation. The continuing ban on livestock imports by Somaliland's usual trading partners, now more than two years old, has severely restricted employment opportunities in the Togdheer agro pastoral FEZ as well as ruining the fodder trade, both of which were important sources of income. The terms of trade (grain/animal, wage/labour) in this food economy zone has therefore deteriorated, even after taking seasonal cycles into account (Figure 2).

Water is scarce in this FEZ and the price of water, primarily for livestock, has increased substantially as many *barkedes*, a common source of water, started to dry up. This has led to livestock out migration to neighboring regions.

Figure 2 : Local Goat Terms of Trade in Burao Market (2000-2002)



According to the baseline study carried out by FSAU during 1998, 20-25% of the population of this food economy zone are poor, 40-60% are middle wealth group and 20-35% are better off, as shown in Table 1 below. It is likely that the poor group has increased in proportion due to sharply diminished jobs and job opportunities.

Table 1 : Description of wealth groups in Togdheer Agro Pastoral Food Economy Zone (Reference Year 1993)

Wealth Group	Livestock holdings	Other assets	% of population	Household size
Poor	Shoats 20-25 Cattle 1-2 Camels 0-1 Donkeys 1	2-hectares	20-25%	6-7
Middle	Shoats 40-45 Cattle 4-5 Camels 2-3 Donkeys 2	4-hectares	40-60%	6-8
Better off	Shoats 80-100 Cattle 10-15 Camel 5-6 Donkeys 2-3	8-12 hectares	20-35%	7-9

The largest proportion of poor Togdheer agro pastoral household income during a "normal" year (1993 is the reference year) comes from employment (30-40%), followed by sale of agricultural products including fodder (20-30%). Livestock product sales (such as hides) generate 20-25% while livestock sales contribute 10-15% of their income. All these income sources are potentially "expandable" in a normal year, meaning that households can increase their reliance on these income sources to offset a decrease in other income sources. Also, during a normal year, poor households have considerable discretionary income, about 10-20% of total income, for meeting other household needs. In this respect, the poor in the Togdheer Agropastoral FEZ are relatively better off than the poor in the Nugal Valley Lowland Pastoral, and the Hawd and Sool Pastoral FEZs.

In a "normal" year poor households purchase 50%-60% of their food needs from the market, while 30%-40% comes from their own crop production. Gifts and own livestock production contribute 10% and 0-5%, respectively. Purchased foods include cereals, sugar, oil and meat.

Due to this heavy dependence on market purchases, the largest portion of poor household income (40-50%) is spent on food and another 20-30% on non-food essentials like social services (education and clan tax), clothes and medicine. Veterinary drugs and agricultural inputs take about 10-15% while 5-10% is spent on oil, sugar and salt non-staple foods and; *khat* (a leaf stimulant).

The Current Situation

Results from a joint field assessment by FEWS NET and FSAU during the first week of September 2002 show Togdheer agropastoral food economy group to be highly vulnerable to sharp drops in income. Three successive seasons of poor rain reduced crop production to 10% of the baseline level and prices of staple foods have increased substantially. Poor households and most of the middle wealth groups have no cereal reserves and therefore depend entirely on market purchases for food. It is reported that the livestock ban has reduced employment opportunities by 20% of the baseline, prompting more rural-urban migration among poor agropastoral households. Fodder sales, which are also linked to livestock trade, decreased by

about 60% of the baseline and reduced poor household income. About 80-90% of the livestock migrated this year to eastern Ethiopia where rains were better. Poor households have therefore sharply reduced direct access to their livestock and livestock products. For instance, milk sales, a major source of household income decreased seasonally by up to 80% of the baseline. Milk consumption at household level is almost zero, jeopardizing the nutritional status of children.

Gifts and kinship support, increased sales of livestock and charcoal production are the main coping strategies employed by poor households. Sales of own livestock increased by about 20-30% of the baseline level. Ironically, the increased supply of local quality animals in the market depressed livestock prices substantially. Findings from the FSAU *Gu* assessment and analysis workshop and the recent FEWS NET/FSAU field assessment show that poor households (8,000-10,000 people) from the Togdheer Agropastoral food economy zone are currently facing moderate food insecurity. They can meet their consumption needs up to the end of the year by resorting to their available coping strategies and mechanisms. However, they remain vulnerable to further shocks and might have food deficit if *Deyr* rains are poor, falling 50% below normal. Close monitoring of the situation will be crucial over the coming months.

For a copy of this report please contact FEWS NET Representative : mawdahir@fews.net

DEYR RAINS INTENSIFY AND MAY CAUSE FLOODING IN JUBA AND SHABELLE VALLEY

Significant rainfall continued to be observed in Southern Somalia. However, rainfall was below normal in some areas of north and northeast Somalia. In the last dekad (October 21-31), see Figure 3 below, heavy rains fell in most parts of southern Somalia (Gedo, Bay, Bakol, Juba Valley) as well as in the Ethiopian Highlands. According to field reports, *Deyr* rains have been intensifying in many parts of Somalia causing the river levels of the Juba and Shabelle to rise. The current 7 day weather forecast (Figure 4) indicates that high rainfall amounts (100+ mm) are expected to fall over parts of the southern Ethiopian highlands together with central and southern So-

malia, especially in the low laying lands of Juba and Shabelle Valley. The river levels of the Juba and Shabelle are higher than September. Many farmers are already opening canals to irrigate their fields. Any additional rainfall will subject the farmers to flood risk. Although the weather prediction indicates a weak to moderate El-Nino, there is high probability of flooding in the Juba and Shabelle regions, due to poor river embankments and the irrigation infrastructure. Therefore, operation agencies should closely monitor the situation and advise communities on appropriate action.

Figure 3 : Somalia Rainfall Performance 21-31 October 2002 Source : FEWS NET and NOAA/CPC

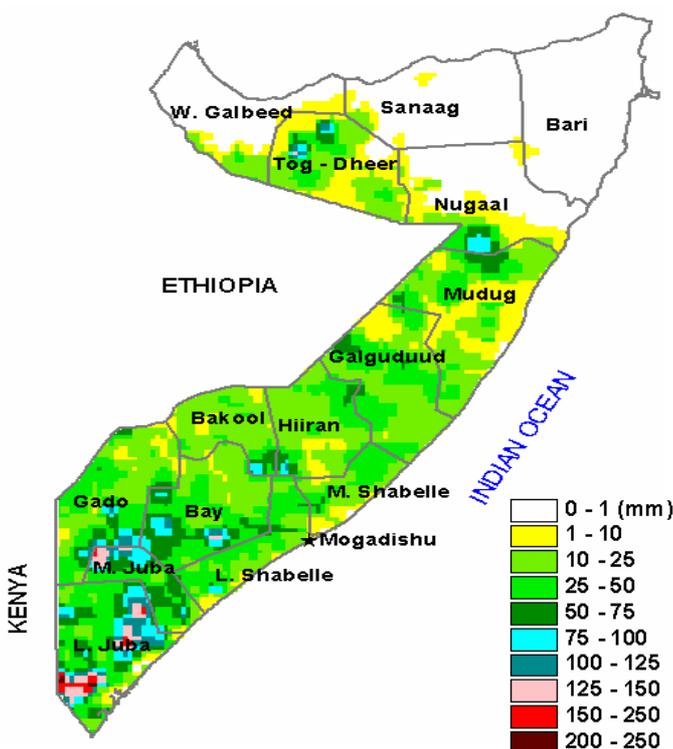
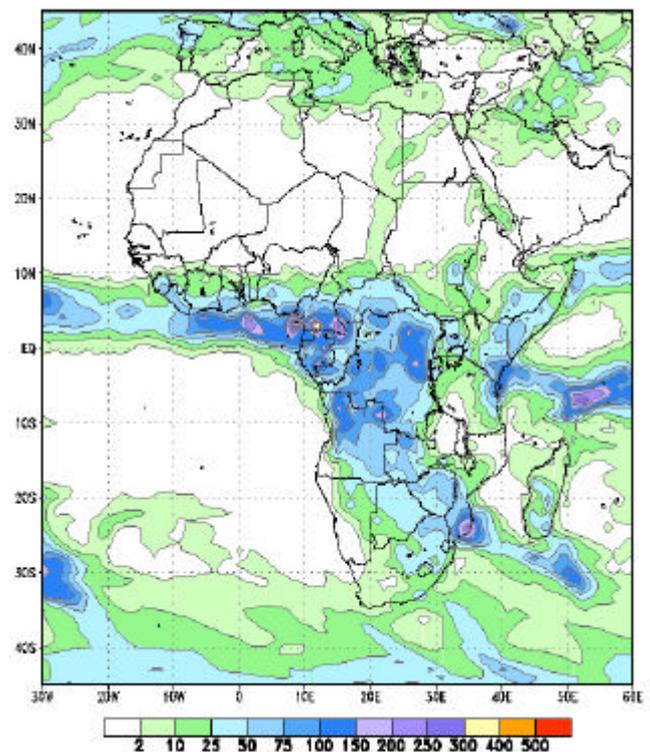


Figure 4 : 7 day total rainfall (mm) valid up to November 6, 2002. Source: NOAA/CPC

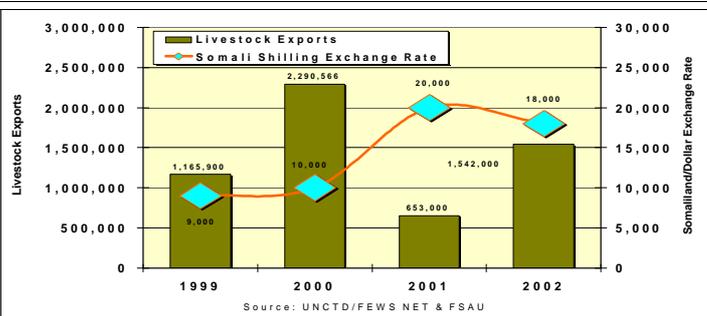


THE EFFECT OF THE DEPRECIATION OF THE SOMALI SHILLING ON POOR CONSUMERS

Currency markets in most parts of Somalia/Somaliland have been in turmoil since 1998 – injection of counterfeit notes, disruption of usual trade and remittance flows and insecurity – are periods when the Somali shilling has lost considerable value. The currency market, essentially consisting of the major moneychangers in Mogadishu’s main Bakara market, Hargeisa and Bosassos, who have sound knowledge about the supply and demand for dollars and shillings, sets the exchange rate for the Somalia Shilling every day. The Bakara exchange rate is the pacesetter rate that influences the other regional Somali exchange rates. These markets operate freely and transparently, although the authorities in Somaliland regulate the Hargeisa foreign exchange market to some degree. As there is no national exchange rate, each major town (such as Mogadishu and Hargeisa) has a different shilling against US dollar exchange rate. Currently, exchange rates vary somewhat regionally due to varying availability of US dollars in different district markets.

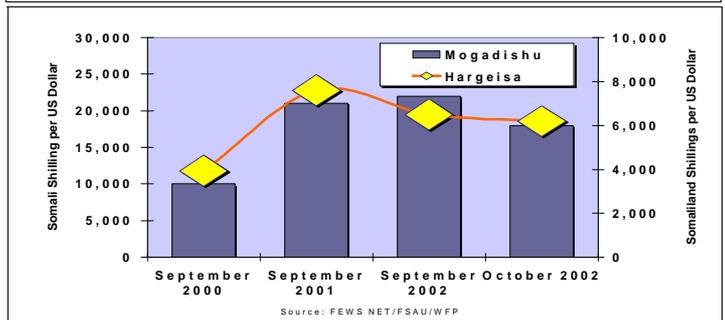
The Somalia and Somaliland shilling exchange rate decreased between September and October 2002. The Somali shilling in Mogadishu has gradually gained value against US dollar as the exchange rate fell from SSh 22,000 per dollar in September to Ssh 18,000 in October. Nonetheless, the exchange rate is still higher when compared to the rate before the ban at around SSh 6,000-8,000 per dollar). In the same period, the Somaliland shilling exchange rate appreciated as well as, from SSh 6,500 in September to SSh 6,200 in October (Figure 6), but the Somaliland shilling-dollar exchange rate remains twice as high as before the ban, SSh 2,900 in August 2000.

Figure 5 : Comparison of Livestock Exports and the Somaliland Exchange Rate



A number of factors influence exchange rate fluctuations, including livestock exports, the money supply and remittances, insecurity and the political uncertainties. The major factor is the livestock sector, accounting for 40% of GDP and or 80% of exports in normal year. This sector remains the main livelihood and source of income for many Somalis, as well as a major source of foreign exchange. As shown in Figure 5, the Somali shilling exchange rate is directly linked with livestock exports -- the more livestock exports increase, the more the Somali shilling appreciates. The shilling gained value in the peak period of livestock exports and lost value in the period of low livestock exports. For instance, in 2000 the value of the shilling increased and the exchange rate against US dollar fell to about SSh 10,000 per dollar. However, in 2001 the Somali shilling lost value and the exchange rate doubled to about SSh 20,000 per dollar. The major reason was the livestock import ban imposed by Saudi Arabia and other Mid-east countries in September 2000. The Somali shilling gained value in 2002 due to the resumption of livestock exports to Fovnt and United Arab Emirate markets, though on a smaller scale.

Figure 6 : Comparison of Livestock Exports and the Somaliland Exchange Rate



This slight appreciation of the Somali/Somaliland shilling helps poor people by increasing their purchasing power and improving their access to imported goods originally paid in dollars. The appreciation of the Somali/Somaliland shilling affects food prices in several ways. First, appreciation reduces market prices in local currency terms of imported food staples, such as sugar, rice wheat flour and vegetable oil. A 50 kg bag of sugar, which cost Ssh 450,000 in late September, now cost Ssh 260,000 at the end of October. Average sugar prices decreased by 42 percent between September and October. In other words, a family can now spend 42 percent less on sugar. The second impact is the improvement of terms of trade for imported goods; where rural people can exchange their products (milk and animals) for cheaper imported commodities. The appreciation of the Somali/Somaliland exchange rate provides short relief for poor people. However, experience shows that the Somali currencies depreciate rapidly, due to lack of availability of hard currency and due to the need of traders to obtain foreign exchange to pay for and import consumer goods from abroad. In addition, demand for the US dollar and other hard currencies is very high in Somalia, especially this month due to pent-up demand due when imports could not arrive due to seasonal high tides between May and September. The situation needs close monitoring.

FAO, INTERSOS AND ADRA SEED AND WATER INITIATIVE IN BAKOL REGION

During recent months, about 200 households in Huddur and Tieglo Districts of Bakol Region have been targeted with a variety of vegetable seeds in an initiative to put waste water from handpumps and wells to good use. Vegetable seeds are not readily available in Bakol Region although some farmers in Tieglo District cultivate vegetables and fruits for the local market.

Through a small initiative between FAO, InterSOS and ADRA in Huddur and Tieglo Districts in Bakol Region, supported by the Italian Government, farmers and households who were interested in growing vegetables have been able to access a variety of vegetable seeds, some tools and some training in vegetable production. Contact was made with farmers through ADRA supported water projects and previous FAO/InterSOS seed beneficiaries with the main requirements being an interest to grow vegetables, access to some land and to water. Prior to receiving seeds, farmers were required to complete the land preparation and fencing of their plots. Those receiving seeds ranged from farmers who have grown vegetables before and have land and wells available to small households starting a vegetable garden for the first time.

Such was the interest and enthusiasm of one farmer that he rehabilitated the well on his land so that he could receive seeds. Also a number of small household or kitchen gardens have sprung up utilising the waste water from nearby handpumps. Some women have even shared seedlings with their neighbours. Already an increase in vegetables in the market in Huddur and Tieglo has been observed. Some families have indicated that they are eating more vegetables (either their own production or they have purchased from the market) and in some case they are using vegetables in place of milk or meat as the prices of these items increase. The initial response from this initiative is promising and highlights the benefits of agencies working together – it would not have worked without the cooperation and support of the agencies already operational in the area. Quite a number of those involved have indicated that they would continue to grow vegetables, both for home consumption and sale in the market, if seed was available locally. So, the next challenge will be to ensure a regular supply of seed at reasonable cost in the area and promote the consumption of vegetables for the improvement of household food security and nutrition.

EMERGING EXPORT MARKET IN CHILLED MEAT IS HELPING TO OFFSET NEGATIVE IMPACT OF LIVESTOCK BAN IN MOGADISHU AND GALKACYO

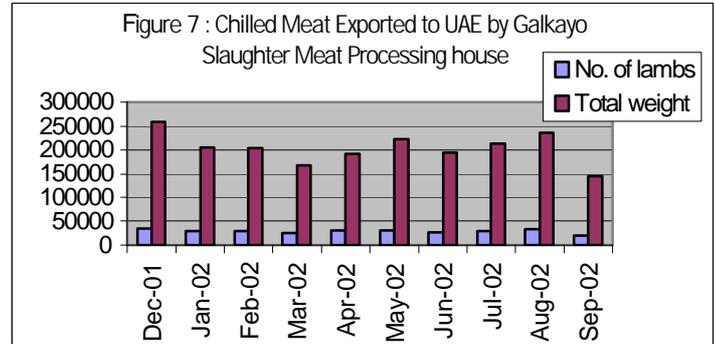
Following the collapse of the Somali government in 1991, Slaughter/Meat Processing houses which opened in Mogadishu in 1996 and Galkacyo in 2000 (also known as 'Mubarak 2') are examples of successful Somali private enterprise which have been implemented in an uncertain economic climate. The chilled meat export industry now plays a significant role in the Somali economy, helping to offset the negative impact of the livestock ban by improving terms of trade for pastoralists and providing labour opportunities to the urban poor and IDPs' coming into these two towns.

The Mogadishu slaughter/Meat Processing house exports 2,500 carcasses of lambs to UAE - four days each week. The weight of each lamb is 6-7 kg and usually in the range of 8-16 months old. This is approximately 10,000 lambs per week, and a total weight figure of approximately 3,380,000 kg per year.

Recently, Mogadishu slaughter/Meat Processing house started to export 4-5 year old male camels and 2-3 year old oxen meat to UAE. Saudi Arabia also imported 803 camel carcasses during August and September. However, this type of slaughtering is only undertaken upon demand from a specific customer who requests Somali meat for its refined taste.

Galkacyo slaughter house exported 142,843 tons of chilled meat from 208,640 lambs between the months of Feb 2001 and December 2001. This slaughter house also exported small calf oxen (2-3 years old) to UAE during the above mentioned period.

with the seasons, as well as with the reproduction cycle of flocks. During the dry season (January - March) and the Hagai months (July-September) livestock condition is poor, pastoralists are migrating - often with an increased distance between market and their animals, the price that animals fetch is low and marketing options are reduced. In contrast, during the wet season - availability of animals is good due to recovered pasture and water. There is limited movement of livestock and new born lambs and calves are in good body condition and fetch good prices which helps the pastoralist livelihood.



These slaughter/meat processing houses have helped improve the livestock price and actually have indirectly helped the income of poor pastoralist households in rural areas. Before the installation of these two slaughter/meat processing houses, the price of one lamb was about Ssh 80,000-90,000. Currently a lamb fetches between Ssh 150,000-170,000. In Mogadishu and Galkacyo the slaughter/meat processing houses have also increased purchasing power, lowered the price of the visceral organs (for poor household consumption) and other valuable organs such as liver, kidney and heart. Organs are not allowed to be exported.

In conclusion, the chilled meat market has offered some relief to pastoralists in turbulent times, particularly as the economy is weak due to the livestock export ban and an insecure environment. The meat export market cannot however replace the traditional animal export market because kids/lambs and calves cannot be moved long distances after they have just been weaned as they are very susceptible to diseases and secondly because the distance between the slaughter/meat processing houses and grazing areas is often far and the body condition of the lambs will deteriorate while being transported. For more information on this subject please contact FSAU Livestock Officer Mahdi.Kayad@fsau.or.ke

Table 2: Chilled Meat Exported to UAE by Galkacyo Slaughter Meat Processing House

Month	Nos of Lambs	Total Weight	Destination
Dec 01	35,019	259,140	Sharja -UAE
Jan 02	29,087	205,433	Sharja -UAE
Feb 02	29,083	204,502	Sharja -UAE
March 02	24,833	167,632	Sharja -UAE
April 02	30,948	192,169	Sharja -UAE
May 02	32,081	223,107	Sharja -UAE
June 02	27,411	194,222	Sharja -UAE
July 02	30,317	214,336	Sharja -UAE
Aug 02	33,244	235,637	Sharja -UAE
Sept 02	20,387	144,199	Sharja -UAE

As shown in the graph opposite, the availability of animals fluctuates

FSAU ASSISTANT FOOD SECURITY ANALYST VISITS GEDO REGION DURING OCTOBER

A rapid assessment was carried out by the FSAU Assistant food security analyst in northern Gedo between 1st -7th October 2002. The whole population of northern Gedo is considered as food insecure. One of the key issues that makes ongoing analysis difficult is the dramatically and constantly changing population numbers in the region which all organizations have been unable to record. The assessment looked at livelihood changes as a result of ongoing food insecurity in the region in all four of the affected livelihoods: Agro pastoral, Pastoral, Riverine and urban poor in the towns. Ongoing insecurity in the region continues to aggravate the critical food security situation leading to further impoverishment. Households have been and continue to be forced to sell off their assets to survive. During the assessment these main areas were assessed: (a) Asset depletion and wealth group shifts. *The shift in number of people moving into poorer wealth groups due to loss of productive assets is a sign of an increasingly unstable economy and likely to be reflected in increased numbers of vulnerable people.* (b) Recurrent drought in the region-coping strategies and the environmental implications (c) Current coping options available. For more information on this subject and a copy of the report - please contact FSAU AFSA : abdiniasir.sobe@fsau.or.ke

Table 3 : Livestock Exports October 2002

Bossasso*	July	August	Sept	October
Camel	820	170	650	782
Cattle	7,610	7,740	3,864	4,448
Shoats	121,490	121,490	69,308	150,845
Total	129,920	121,210	73,822	156,075
Berbera**				
Camel	1,151	3,589	921	1,251
Cattle	1,752	2,092	1,843	4,503
Shoats	12,861	35,233	30,089	42,261
Total	15,764	40,194	32,023	48,015

Source *: Bossasso Port Authority

Source **: Berbera Port Authority

REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS >> P.7

Every month, the 22 FSAU Field Monitors provide in depth information on food security indicators in their areas. If you would like to obtain a copy of their district reports - please contact alex.williams@fsau.or.ke. The Regional highlights are a summary of this field info.

NORTH NUGAL AND SOUTH BARI

In this region, rains have been extremely varied. On 23 October rain finally arrived in Eil district encompassing Addun, Deeh, Coastal and *Hawd* eco-zones which had not received any rain—and brought much needed relief. In Gardo district pasture and rainfall conditions are very good despite in-migration from the adjacent areas of Lyah, Nugal valley and Deeh of Eil and Beyla however there is now a danger of overgrazing due to high concentration of livestock in the area. Pastoralists also have been experiencing a difficult time with their expenditure which has been severely dented by huge outlays for buying water when the rains didn't arrive. Pastoralist households have had to pay money to truck by lorry their animals out of areas where there has not been sufficient water. Furthermore, milk is the main source of food and income and food at this time of year and the late rains have put increasing strain on these already vulnerable households. Milk production has been below normal and therefore opportunities to earn income have not been so great. There has been a slow down in construction activities in the urban centres as the diaspora become increasingly concerned about investing following political instability. This has created redundancy amongst migrant workers. Commodity prices have fallen as opposed to last month—due to the opening of the new trading season and there being more supplies of local cereals in markets.

SOUTH NUGAL AND NORTH MUDUG

The delayed *Deyr* seasonal rains in Addun, Deeh and in eastern *Hawd* of Jerriban district has brought abnormal livestock and human migration by means of trucks towards the western end of the *Hawd* crossing over the Ethiopian borderline. 70-80% of Better and middle wealth group moved. While 10-20% of mainly middle and poor wealth groups stayed behind in the east of Burtinle and Harfo villages in deteriorating conditions before it rained extremely heavily on 24-25 October. Even though the *berkads* are now full, the pasture has not fully regenerated and livestock condition in these areas remains very weak. The poor pastoralists in the area are experiencing a food deficit with little milk production or marketable animals. Within the HEA framework the pastoralists staple food purchase is now 50% below a 'normal' year and they are coping by selling their labour and by self-employment. Staple price of food has risen due to transportation problems caused by rains in the south. The FSAU FM was a leading participant in a group of NGO'S and UN agencies who met with the local authorities in Mudug to discuss this situation. Heavy rain commenced as the meeting was in progress. Elsewhere the seasonal rainfall in the *Hawd* FEZ which stretches from Galkayo to Burtinle in South Nugal was adequate filling the majority of the *berkads* and *balleys*. There has been large scale migration from the neighbouring Addun FEZ – livestock and animals travelling distances of up to 100-150 Km to reach better pasture.

SANAG AND TOGDHEER

During the second decade the *Hawd* of Togdheer and the Golis range received fairly well distributed and effective *Deyr* rains improving browse and pasture. The drought affected areas of Sanag region received less rains – apart from Gebi valley. In Sool plateau milk production, livestock reproduction and conception rates are below normal. The impact of the loss of productive assets in the last *Hagai* is being felt. However, the availability and access of water is now normal in all parts of the region apart from small pockets. Livestock migration is very limited in both regions whether it is out migration or in migration and patterns are fairly normal. Camel calving rate is normal in the *Hawd* of Togdheer but far below normal in the Sool Plateau. For the first time it has been observed that traders from Bossaso are buying animals from Burao market and are sending them to Gulf countries as a result purchasing power of pastoralists is improving. In both regions apart from Burao town the price of milk / litre has dropped by 30-40% .

NORTH WEST AND AWDAL

Rains that were received were scattered and localised in both areas of the region. The coastal and sub-coastal belts remain hot and dry—heavy rainfall was expected but it never materialized. The potential borehole of Karure village in Lughaya district has been out of order since May 2002 . Water availability is below normal in many parts of the coastal belt. The productive potential in the coastal/sub coastal belt is deteriorating due to the length of the long/dry hot season. As pastoralists rely on dairy production and livestock sales, the prolonged of the drought is causing difficulties for many households. The closure of the Ethiopian border with Somalia has reduced the purchasing power of both communities on both sides.

SOOL REGION

****Note Sool is an administrative region and the Sool Plateau is a geographical area and a food economy zone.**

Sool Plateau and lower Nugal received scattered and patchy rains but good *Deyr* rains were received in the *Hawd* and upper Nugal. In the latter areas there has been noticeable improvement in pasture/browse, milk yield and herd body condition. The livelihood of the dominant pastoral Food Economy zone is stabilizing this month. Household access to food has improved following temporary livestock market price gain – increasing pastoral production and Terms of Trade. In Las Caanood town 72mm of rain was recorded for the month. Small ruminants are gaining body weight - but camel and cattle are recovering slowly because of the impact of long standing drought conditions. The exchange rate dropped from 21,180 Ssh to 18,300 Ssh in the last two weeks of the month. Consequently there has been a price decline in certain staple food commodities i.e – the price of rice dropped by 15% in the month.

BARI

DHARROOR FEZ (Bossaso/Iskushuban districts) The overall food security situation is normal although the following negative factors could contribute to affect overall pastoral livelihoods. High incidence of ecto-parasite diseases in Dharroor valley plains due to livestock concentration, limited camel milk production and non-returned migrated camel herds from lyah of Nugal which has put pressure on resources. The month started with a few scattered showers but rainfall was almost non-existent in the last two weeks. September rains filled most *Balleys* and *Berkads*. Run-off water from distant areas did not flood the Dharroor valley and other plains. There is a slight improvement in livestock prices especially goats in rural markets due to increased demand from L/export traders as the peak period approaches. Income from milk sales is below normal due to the *Deyr* 2001 drought and its effect on reproductive performance of camel herds. Seasonal lobster catching has commenced with good prices being fetched. Seasonal livestock migration to the sub-coastal plains has not taken place as insignificant rains have fallen **IN SOOL FEZ** (Iskushuban and B/Beyla districts) generally the food security situation is normal though poor households access to camel milk for consumption and income remains below normal. Limited showers occurred over Rako and Duudhooyo. September rains improved pasture and grazing. Normal goat kidding rates and camel conception rates are reported while calving rates are below normal due to the last poor *deyr* season. However, there is currently no water crisis in the Sool of Bari. Seasonal human migration to the coastal fishing areas has taken place as lobster catching activities commence which contributes a large proportion of income for many pastoralists. Livestock migration to the seasonal grazing areas has not taken place due to the delayed rains in the sub-coastal plains near Sool Plateau. Depressed livestock trade and less availability of camel milk are the key factors restricting normal pastoral behaviour. **In the COASTAL FEZ** (Bossaso, Iskushuban and B/Beyla districts) the food security situation is normal with the exception of poor urban wealth groups particularly IDP'S in Bossaso town. No rains were received except a few scattered showers which fell over the coastal plain. Port activities have resumed. Bossaso inhabitants returned home and this migration has positive economic impact among the poor urban particularly IDP'S. In Bossaso town, the water authority has increased the price of water by 75% from Sh 800 to 1,400 per one metric cubic.

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HIRAN

For the latest Update from Belet Weyne see *Highlights on Page 1*. Agro-pastoral and riverine groups remain in an alert situation due to successive crop failure of the last 3-4 seasons, as well as late onset of the *Deyr* rains. Poor and erratic rains were received in pastoral areas but were not enough to restore the food security situation to normal. Camel herders moved away to graze their herds in areas where it had rained and this resulted in reduced milk supply to urban centres. In agro-pastoral and riverine areas there have been reports of some cattle death. Access to food is proving difficult for the poor agro-pastoral and riverine groups who have little access to cereal stocks. They are taking out loans, receiving assistance from relatives, migrating to urban centres and finally selling off weak cattle at a low price which would be an asset in a normal period. On October 23, rains were received in most of the agro-pastoral and riverine areas but it is too early to say whether they have bought the required relief. There has been a noticeable shift from spending from non staple and non food items to staple purchase. Livestock prices are higher compared to normal but similar to last month. With the migration of animals further away from towns, livestock prices have increased. Cereal prices are 50% higher compared to normal but the same price as last month, terms of trade are currently manageable.

GEDO

Sporadic rains have commenced in Gedo region. Rains came early in Belet Hawa and Garbaharey while other districts—they arrived later. Water catchments contain water and access is considered to be normal. In the south of the region, preparation for the coming *Deyr* has commenced creating labour opportunities for the poor and very poor households. When the *Deyr* rains arrived late, most inland pastoral groups out migrated to middle and lower Juba in search of better pasture and water. Most households in the northern districts are using expanding coping strategies to gain access to food and income which includes the collection of firewood and charcoal burning.

LOWER SHABELLE

Overall food security situation is considered normal because of good accessibility to food, good household stocks (apart from poor riverine groups) and employment opportunities in the agricultural sector. In addition the price of the staple food (maize) has declined during the month, making it more affordable for the poorer wealth groups. Although good *Deyr* rains were received in September—the October rains were poor and fairly localized. Adequate rains in the pastoral areas have alleviated the water problems although there is a heavy concentration of animals in some areas which will cause early depletion if further rains are not received in the area. Early migration of animals to favourable areas has allowed early recovery and improved production status. However, our field monitor noted that cattle in the Afgoi area are in poor condition. In rain-fed areas—germination has been poor due to insufficient moisture. Many irrigation canals are not functioning due to poor rehabilitation. Sesame harvest from the coastal area of Kurtun-warey and Brava are ongoing.

BAY

Rains started earlier than usual which improved the water and pasture condition. Local farmers started planting which created job opportunities for the poorer wealth groups. The price of sugar has increased very suddenly to Ssh 30,000 a kilo due to supply problems associated with insecurity and markets but the price is now restored back to its usual level. Livestock condition is normal in terms of milk and meat production. Seasonal migration from agricultural lands to range lands has commenced. Livestock price has increased partly due to additional demands from Garissa and Mogadishu. Water catchments are fairly full and there has been germination of crops and recovery of pasture. FSAU rain gauge located in Baidoa town recorded 116 mm in 4 days. Check points have increased on roads—causing transportation costs

MIDDLE SHABELLE

Deyr rains started in the first week of October and are continuing. However, the area between Balad and Mogadishu (coastal plains) received no rain. Rainfall recorded in Jowhar was 115.23 mm. Pasture and grazing have improved since the onset of the rains. Animal body condition has improved - improving animal production in terms of milk and meat. After the onset of the rains most animals moved away from the riverine areas to inland rangelands for better grazing and to avoid the tse tse problem. Milk availability in the market slightly decreased due to the distance of animals from market. In the agricultural sector, households are busy with their usual activities such as late planting for maize and sorghum and first weeding. Some farmers are flooding their field for the purpose of planting sesame later on. The Shabelle river level is normal allowing gravity irrigation. Main problem is the lack of rehabilitation for primary canals. Food availability and access is normal. The supply of maize and sorghum is normal. Household cereal stocks for both irrigated and rainfed farmers is good.

COWPEA BELT

There were scattered *Deyr* rains of moderate intensity in the first and second dekad—inland. This has improved germination of crops and improved condition of pasture. The coastal plains remain hot and dry with no rains. Livestock production is near normal for goats, sheep, cattle and camel inland where it has rained but the coastal plains are enduring hardship and a number of dead shoats and cattle can be seen on the side of the road. Coping strategies available are the selling of livestock and livestock products, collection of bush products, receiving remittance—although this is declining as period of difficulty has been ongoing since *Jilaal* 2001. There is not so much collection of wild foods at this time of year but some animal hunting does take place. There are seasonal fishing activities with co-operatives running trucks along the coast line collecting fish and lobsters for export. The coastal districts are experiencing serious hardship due to the poor *Gu* harvest of 2002 and many have already sold livestock.

GALGADUD

The situation is normal for the time of year. Some significant rainfall fell on 20th October in the region - enough to fill about 60% of the berkads and balleys but more rain will be required in the region after the long dry season for proper recovery. Water availability in the region remains normal due to the early rains received on 26th September. Money which had been spent on purchasing drinking water can now be utilized in other areas. In some areas berkads and balleys are reported as dry so poor households have moved to - B/balle, Guriel, El-dhere and Adado districts. There are pockets where poor pastoralists are experiencing difficulties such Dusa-mareb and Qaradhi but better off pastoralists in these areas truck their animals out when no rains appeared. Poor pastoralists are coping by migration to urban centres in search of employment. Milk price is much higher than usual. One litre of camel milk cost Ssh 16,000 as compared to Ssh 9,000 last month and Ssh 3,000-4,000 in a normal month. The high price has been caused by lactating animals moving from urban areas to further out in search of pasture and water.

BAKOL

Deyr rains started in early October except in Tieglow, which received rains in mid-Sept. Rabdure has received little rain. Crop condition in the region is normal. Crop seedlings have uniformly emerged in most of the region except in Tieglow area and villages east and south of Huddur. Water situation all over the region is good except in Rabdure. The price of cereals, sorghum and maize continue to be higher this month—militia check points increase transportation costs. Milk prices have come down from Ssh 6,000-8,000 last month to Ssh 5,000 this month. Livestock prices are still high due to demand from Mogadishu and Mandera. Poorer households are managing through agricultural employment the collection of bush products, such as frankincense in Tieglow and Elberde.