

FSAU REPORTS AND ACTIVITIES

**The *Gu* 2002 Seasonal Assessment workshop took place in Hargeisa between 7-15 September. FSAU's 22 Field Monitors, FSAU Nairobi staff, representatives from FEWS NET and the Food Economy Group participated.

** Following the completion of the security assessment in northern Gedo, the FSAU nutrition surveillance unit have been given permission to undertake a nutrition survey in the area, along with partners – the likely location will be Belet Hawa. A four day training will commence in Mandera around 14 October and will be followed by around five days data collection in Belet Hawa District.

** On 5 October, the FSAU Assistant Food Security Analyst travelled to Mandera to research information on northern Gedo which has been closed due to insecurity. For his update see page 6.

FOOD AID DISTRIBUTION

Somalia's two principal food aid agencies, CARE and World Food Programme, continued their operations in September, providing much needed food to targeted beneficiaries through general distribution, food for work and feeding operations. In Gedo region CARE distributed a total of 2,924 MT of food in a general food distribution. The distribution consisted of sorghum, lentils and oil. 472 MT were distributed in El Waq district, 899 MT in Belet Hawa, 396 MT in Dolow and 1,158 MT in Luuq.

Meanwhile WFP distributed 800 MT to 6000 families in Garbaharey and 550 MT to 4000 families in Burdhubo.

In Bay region, CARE carried out targeted food for work on road rehabilitation projects. 30 MT was distributed to 162 beneficiaries in Qansah dere and 32 MT in Burhakaba to another 162 beneficiaries.

Although Baidoa has been closed to UN staff due to insecurity, WFP is continuing its programmes in Bay region and has set up an operating base in Wajid. WFP distributed 325 MT of food for work in Bay and Bakol. In September WFP distributed 165 MT in the NorthWest and did a free food distribution of 25 MT in Bari region.

HIGHLIGHTS

SUMMARY OF GU SEASON AND IMPLICATIONS ON FOOD SECURITY :

Figures from the 2002 *Gu* harvest assessment, conducted by FSAU indicate that overall sorghum and maize production is 35-40 percent up compared to the post-war reference year of 1995 and just over 80 percent up on 2001 *Gu* production. FSAU Field Monitors report particularly good production in southern Bay, Lower and Middle Shabelle regions but poor harvests in Hiran, Bakool and Gedo regions. The *Gu* harvests there only contribute a small percentage of needs even in a good year and is not critical for food security of the pastoralists and agro-pastoralists as long as market access is not constrained. Pastoral groups that form the majority of the country's population remain highly dependant on the coming *Deyr rainy* season in October-November that breaks the long dry spell between June/July and April. The 'near to normal' precipitation forecast by the Climate Outlook Forum might allow some recovery following several difficult seasons for livestock owners. However, a poor *Deyr* season could herald a very difficult time and sudden downturn in local economies seriously undermining the food security of pastoral groups.

DEYR RAINFALL BEGINS IN NORTH WEST : As a result of the poor *Gurains*, the FSAU and Horn Relief reported last month that about 25,000 Somali pastoralists in the Sool Plateau in north-western Somalia faced increasing food insecurity. The high cost of water has weakened the purchasing power of the poor pastoralists and scarcity of quality pastures has weakened the livestock of better-off groups. Food access is threatened by increasingly restricted income opportunities. Good *Deyr* rains in October will be critical to improving food security in the Sool Plateau, as well as in the neighbouring Sanaag region, and to prevent conditions in other pastoral and agro-pastoral areas from taking a further turn for the worse. Recent rains are offering hope that the *Deyr* will bring some essential recovery.

GEDO : In northern Gedo the poorer urban populations of Luuq, Dolow, and Belet Hawa were reported to be heavily dependant on food aid since March 2002. Populations figures now need to be checked as it is expected that many groups moved to surrounding areas during the months when humanitarian assistance was blocked by insecurity. Further interventions will need to be carefully planned to prevent populations being drawn back to these areas. It has been suggested that the access to food in neighboring areas such as Madaytu and El Bon need to be assessed and to consider whether interventions outside the key areas of vulnerability would promote some better opportunities for recovery. Any interventions to promote income generation will help enormously where food remains unaffordable for many.

Highlights from the FSAU 'Nutrition Update'

Health and Nutrition organisations met in Belet Weyne (Hiran region) and agreed on a number of short-term interventions that will be established in the coming weeks to address poor nutrition conditions. These will include targeted general ration, supplementary and therapeutic feeding as well as a package of preventive and curative health interventions. During October, FSAU will undertake assessments of nutritional status in other parts of Hiran.

A report on '*Food Utilisation in Somalia*' has now been completed and is available on request from the Nutrition Project of FSAU. The study has highlighted the strong possibility that some sections of the population in Somalia experience substantial deficits in basic nutritional requirements outside times of crisis.

Preliminary results of nutrition surveys in *Rabdure* District of Bakol Region and *Bari* Region, Puntland will be available in the October Nutrition Update'.

In northern *Gedo*, FSAU will lead an inter-agency nutrition survey when the security situation allows.

In *Huddur*, FAO met with partners from twenty-three international and local organisations to analyse issues that contribute to malnutrition in the region and to develop innovative interventions to address problems, in particular in the food security sector.

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



SOMALIA'S FOOD SECURITY SITUATION FOLLOWING THE GU 2002 SEASON ASSESSMENT

FSAU will present its annual needs assessment at the SACB Food Security Sectoral Committee/SCORD on October 9. A subsequent FSAU *Focus* will detail predicted areas of food deficits and associated food insecurity over the next twelve months throughout the country. The assessment will be based on two scenarios: (1) 50 percent percent of normal *Deyr* rains and (2) 100 percent percent normal *Deyr* rains. Relevant interventions to address food insecurity in highlighted vulnerable areas will be put forward by FSAU for further discussion and decision in the SACB arena.

Total cereal production is estimated to be 208, 930 MT (62 percent maize and 38 percent sorghum), which is 19 percent lower than figure projected during the crop establishment assessment (June). Compared to the *Gu* season post-war average (1995-2001), *Gu* 2002 production is 38 percent higher. It is also 28 percent higher than *Gu* 1995 which is considered to be a normal year due to its closeness to the post-war average. Best of all, *Gu* 2002 production is 80 percent higher than last *Gu* season (2001). The following graph shows the regional contribution to the total cereal production of Southern Somalia.

INTRODUCTION

Fieldwork for the *Gu* 2002 harvest assessment in Southern Somalia was carried out between 19 August and 5 September. FSAU Field Monitors gathered information on *Gu* crop harvest production and livelihoods within their respective food economy zones. At the *Gu* Harvest Assessment workshop held in Hargeisa between 6-22 September FSAU and FEWS NET further analysed field data related to the *Gu* season, such as rainfall performance, crop production, livestock conditions, market prices to develop a comprehensive picture of food availability and access at the household level.

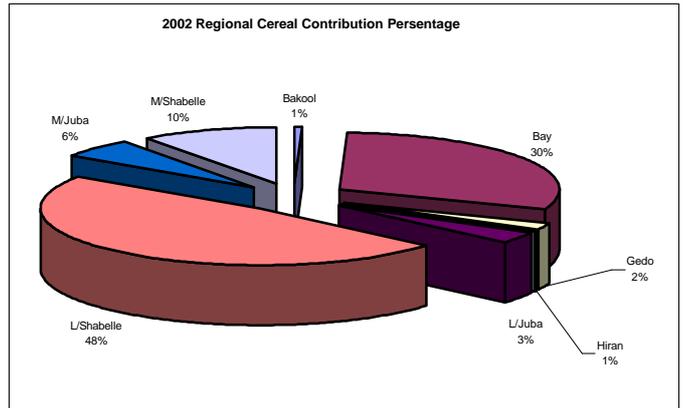
GU SEASON RAINFALL

Rains started early in Southern Somalia in April and were normal throughout the region apart from Bakol, Hiran and parts of Gedo regions. In the North-East, the traditional grazing areas of the Nugal Valley, Addun, parts of the Hawd, the Sool Plateau and the Iyax Plateau received extremely poor rains, having a detrimental effect on pastoral livelihoods. In the North-West, Togdheer and Sanag regions also received poor rainfall.

AN OVERVIEW OF CEREAL PRODUCTION

This year, the *Gu* season in Southern Somalia was unique as the rain started early and its intensity and frequency promoted good crop establishment in both irrigated and rain fed areas. However, production was constrained by some factors that affected crops in their later stages of development. These included low river levels for gravity irrigation in some parts of the Shabelle riverine areas, smut diseases on sorghum, (stalk borers on maize, grain feeding insects at milk stage of sorghum) bird attacks on the sorghum crop, insufficient *Hagai* showers and insecurity. Nevertheless, cereal production is considered about 35-40 percent above average – the total harvested areas being estimated at 397,870 hectares (57 percent sorghum and 43 percent maize). This cultivated area is 9 percent lower than the projected areas during crop establishment.

Figure Two: Contribution to the Total Cereal Production in Southern Somalia by region.



Source : FSAU

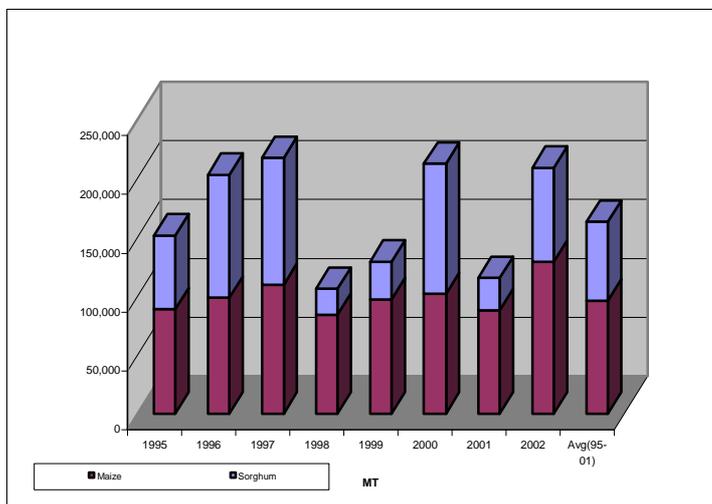
GEDO

In Gedo, the *Gu* sorghum crop which rarely contributes more than 4% of total production was half the post-war average. This still has profound implications for the continuing food insecurity situation in northern Gedo (particularly Luuq, Dolow and Belet Hawa districts), which are of great concern as the poorer population groups are more vulnerable to the depressed market and lack of income sources. This, combined with insecurity and restricted mobility led to food aid contributing 30-35% of household energy in March. Other influencing factors were that neighbouring high-potential sorghum producing areas of Madaytu and El Bon (northeast of Luuq) experienced poor *Gu* production. The cereal flow into these areas from Bay region has also been slowed by landmines and recent insecurity. These factors have contributed to a situation which has left very poor/poor households with no access to food stocks -- due to weak purchasing power -- caused by their lack of viable income options.

The majority of the population in northern Gedo has been experiencing food insecurity over the last three years. This follows repeated and successive rain failures which have hampered crop production and accelerated the drying up of pastoral rangelands; labour availability, labour pay rates and other income earning opportunities have been drastically cut, while persistent insecurity has led to limited investment and has hampered the implementation of all but the most basic emergency aid intervention. The drought has particularly affected the urban poor as well as the pastoral and the agro-pastoral groups but the recent insecurity has also impacted on the riverine farmers.

Comparing 2002 to the 1998 baseline year, poor households within all food economy zones are expected to experience a large food and income deficit over the coming year, if the *Deyr* rains fail once again. Due to insecurity, food assistance has been unable to reach certain areas so people are resorting to extreme coping activities which consist of selling off unsustainably large numbers of livestock, intensifying charcoal burning and selling off other essential household assets. For these people a range of humanitarian responses need to be considered to support livelihoods including food aid, livestock drugs, seeds in the next rainy season. Income generating activities will also play an important part in their recovery. Security will also continue to influence the food security situation in the region.

Figure One : *Gu* 2002 Cereal Production MT Compared *Gu* 1995-2002 and Post-war (1995-2001) average



Source : FSAU

The majority of the population living in the relatively peaceful southern part of Gedo are expected to be able to access sufficient food, provided that the road linking Bay and Bardera remains open so there is a continuous flow of commercial cereals in to the region - and livestock demand remains high in the Garissa (Kenya) market to improve and maintain pastoralist and agro pastoralist terms of trade.

HIRAN

The poor rainfall in the *Gu* 2002 season resulted in a very poor harvest in both rain fed and riverine areas as well as adjoining areas in Ethiopia. The riverine areas also had a very low crop production, 90 percent below the *Gu* post-war average. Some reports suggest a shift to fodder sales having some impact on the depressed cereal production which highlights the importance of livestock in this area while also explaining increased local cereal demand. Belet Weyne is the worst affected of the three main cropping districts in terms of production.

Pastoralists have already migrated to Middle Shabelle region where grazing and browsing is good and cereal prices are low compared to the rest of the region. Poor agropastoral and riverine groups who remain in Belet Weyne look for employment, sell fodder and use kinship support as coping strategies. These groups have dwindling cereal stocks and very poor purchasing power. For pastoral households, their Terms of trade are still good and they are expected to meet their daily energy requirements up until the next rainy season, which usually starts in October.

CEREAL OUTFLOW

Hiran is a transit point for cereals from Southern Somalia to Central, Northwest and NorthEast Somalia. FSAU Field Monitors have reported significant cereal outflows from Somalia (especially from Bay and the Shabelle Valley) to eastern Ethiopia via El berde and Belet Weyne. Traditionally, Beletweye and El berde, two border districts in Somalia receive commercial cereals, mainly maize from Gode and Kalago (Shabelle riverine areas) of Ethiopia. SCF UK confirmed poor cereal production in both Afder and along the Shabelle River (Gode, Kelafo and Mustahil Zones) due to a combination of moisture stress and heavy pest infestation. Consequently, prices of cereals in those areas are higher than normal and the terms of trade have worsened for consumers in Ethiopia. Sorghum from Bay is therefore helping to keep markets supplied and prices low in Afder Zone of Ethiopia. This may quickly drain cereal stocks in Somalia which are going out towards Ethiopia.

BAKOL

Low rainfall caused *Gu* cereal production to fall 65 percent below the post war average. The worst affected districts are Hudur, Tieglow and Wajid and the most affected livelihood groups are poor agropastoralists but currently they have access to cheap cereals from Bay region. This is likely to continue if security remains normal in the sorghum belt. Reports suggest that some agro-pastoralists have moved to Bay region in search of work, although self-employment, such as cutting and selling building poles, is used as a coping strategy.

There is a danger that large numbers of poor households may migrate to Luuq district in Gedo if large-scale emergency interventions are set up in the region –although there has been no evidence of this taking place this year. The food security of poor agropastoralists may worsen in the coming months if cereal prices increase and income opportunities decrease. Close monitoring of the entire region is needed.

OTHER AREAS OF CONCERN

The Cowpea Belt extends from Middle Shabelle, Galgadud and part of Mudug regions of Central Somalia. Agro-pastoralists grow cereals and cowpeas and raise shoats, camel and cattle. *Gu* crop production was very low, although cereal outflow from Shabelle valleys has found its way into the Cowpea Belt. There is an active livestock trade to Galkayo and Mogadishu and limited exports to Oman and Arab Emirates have improved the agro-pastoralists' terms of trade. Poor agro-pastoral households rely on fishing, migration to Mogadishu and sale of bush products as their main coping strategies.

Table One: *Gu* 2002 Cereal Production (MT) Compared with *Gu* 1995* and Post-War *Gu* (1995-2001) Averages**

| REGIONS | GU 2002 | | | GU 2001 Sorghum and Maize | Percent GU 1995 | Percent POST-WAR AVERAGE |
|-----------------|-----------------|----------------|---------------------------|---------------------------|-----------------|--------------------------|
| | Gu 2002 Sorghum | Gu 2002 Maize | Gu 2002 Sorghum and Maize | | | |
| BAKOL | 1,155 | 45 | 1,200 | 1,862 | -76% | -65% |
| BAY | 56,260 | 6,920 | 63,180 | 5,660 | 111% | 47% |
| GEDO | 2,663 | 1,383 | 4,046 | 3,427 | -44% | -53% |
| HIRAN | 210 | 460 | 670 | 1,600 | -93% | -89% |
| LOWER JUBA | 86 | 6,660 | 6,746 | 7,155 | 5% | -15% |
| LOWER SHABELLE | 8,700 | 92,020 | 100,720 | 64,490 | 58% | 55% |
| MIDDLE JUBA | 2,408 | 9,180 | 11,588 | 11,695 | 19% | -6% |
| MIDDLE SHABELLE | 8,429 | 12,350 | 20,779 | 19,506 | 5% | 26% |
| TOTAL | 79,911 | 129,018 | 208,929 | 115,395 | 38% | 28% |

Source : FSAU/FEWS NET

* The *Gu* 1995 is considered benchmark due to its closeness to the post-war average

** The *Gu* (1995-2001) has been taken as an average of a post-war *Gu* season

NORTH EAST SOMALIA

The *Gu* rains on the plateau areas of Addun, the *Hawd* of Mudug and Nugal Regions, the Iyax Plateau and the Sool Plateau were very bad this year, especially the Iyax and Sool Plateaus. Pastoralist households there, already suffering a large income shock caused by the livestock ban and poor livestock production, now face acute water shortages that have driven prices for this essential commodity up by as much as five times in US Dollar terms. Households are resorting to extreme coping strategies; they are selling off more than the sustainable number of livestock, or they are abandoning their pastoral livelihoods and are migrating to urban centres. Their ability to migrate *with* their livestock is hampered by poor access to grazing and water in other areas as well as the nature of their animals; small ruminants such as sheep and goats cannot migrate long distances. Interventions aimed at boosting and diversifying household incomes, as well as relieving the acute water shortages, need to be given strong consideration in designing a response. Although rains were poor in the eastern half of the Nugal Valley, pastoral groups there are not expected to face any food deficits.

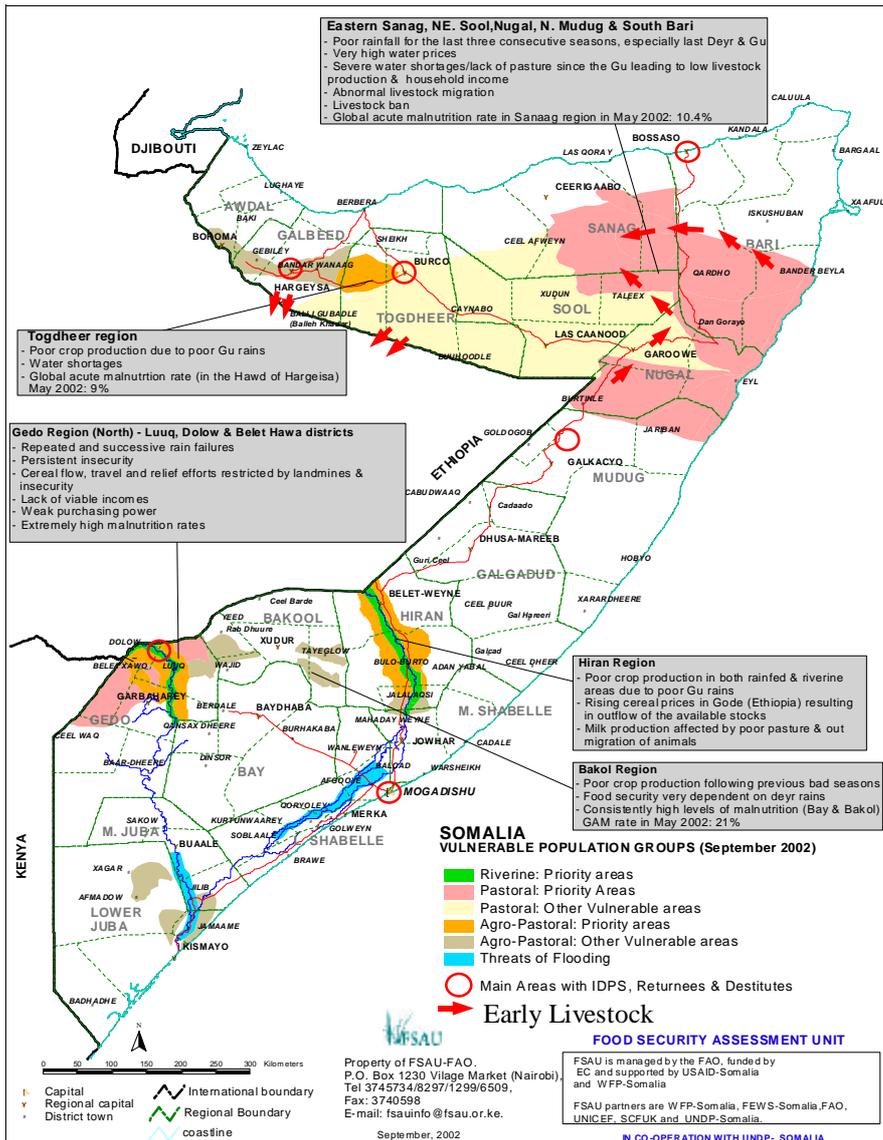
NORTH WEST SOMALIA

The Togdheer Agro-Pastoral Food Economy Zone lying between Burao and Hargeisa has been particularly hard-hit this year. Usually one of the better-endowed food economy zones, households in this area suffered severe crop losses whose impact has been worsened because of the lack of labour opportunities.

The Northwest Agro-pastoral Zone from Hargeisa through Gebiley to Boroma saw considerable recovery following good *Karin* rains in August. Crop production is still thought to be below normal. However, this estimate may be revised again in October, following the completion of the season.

If you would like to discuss any of the issues raised in the Gu 2002 Seasonal Assessment Summary please contact: alex.williams@fsau.or.ke who will put you in contact with the appropriate FSAU technical representative.

VULNERABILITY MAP FOLLOWING ASSESSMENT OF GU SEASON- OCTOBER 2002



FSAU HOUSEHOLD ECONOMY ANALYSIS TRAINING FOR PARTNERS

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 (for which the provisional dates are December or January).

The purpose will be to (a) train new FSAU staff and partners in HEA; (b) compile food economy baseline profiles for priority livelihood groups in an area; and (c) understand how poor households are coping in the current situation.

The training is designed as an integral package, broken into three sections. (1) HEA theory (6 days) is suitable for programme managers as well as those who will participate in the field section. This section will cover background to food security analysis and early warning systems, HEA theory and concepts, quantifying the household economy, field work skills, analysis and interpretation. (2) Practical exercise (10 days) in the field collecting HEA data and carrying out mini-analyses. (3) Analysis, interpretation and reporting (classroom based). This is the process whereby the data is consolidated, analysed, interpreted and the findings are developed.

? Partners are invited to identify staff for Section (1) OR the entire three section training.

? The training will be carried out on a cost-sharing basis, with participating partners helping out with the provision of vehicles.

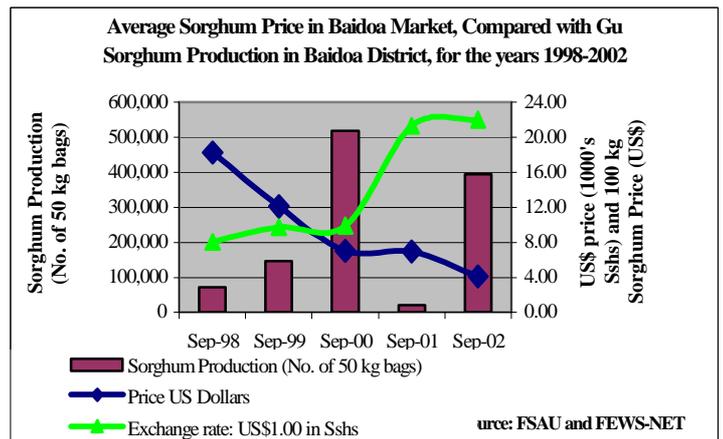
Areas of assessment will be selected based on the priorities of the FSAU and partners. The priority areas for FSAU are those which are more prone to food insecurity, where little good-quality information is available, where participating agencies have an interest and where there is freedom of movement for Somali personnel.

For more information please contact the FSAU Field Support Operations Manager, Lesley.Adams@fsau.or.ke .

THE IMPACT OF GU 2002 HARVEST ON LOCAL CEREAL SUPPLY AND PRICES

Household food availability in Bakol region and parts of Gedo and Hiran regions is extremely low. Poor and middle wealth groups of riverine and agro-pastoral food economy zones in these regions have exhausted their cereal reserves and consequently depend on market purchases. Cereal prices in all these areas of poor production are consequently higher than in Baidoa. Last year, contrary to the expectation that prices would rise dramatically following a bad harvest, there was the unusual phenomenon that hard currency sorghum prices remained at the same low level as the previous high production year. The following explanations have been put forward: (a) A higher than estimated carry-over of stocks from 2000, particularly by the better-off and middle wealth groups, enabling grain sales to areas outside of Bay to continue well into the Deyr of 2001. (b) The devaluation of the Somali shilling between September 2000 and September 2001 created an impression that prices had recovered. In September 2001 prices of sorghum in Somali shillings actually rose to levels that were similar to 1998- but which made local prices look as if they had recovered. This year, following a reasonably good harvest in Baidoa district, cereal prices in Baidoa have dropped once again. The figure opposite illustrates the well-known inverse relation between supply and price. It compares average of sorghum prices for 100 kg in Baidoa market with Gu production (in numbers of 50-kg bags). Currently, in Baidoa market, a 50 kg bag of sorghum fetches about \$2.05 (or Ssh 45,000). Cereal prices in Bay region may

increase early next year due to following factors: (a) Failed grain production in most neighbouring regions, including shortfalls in production in the grain-producing parts of Region 5 in Ethiopia, are attracting higher prices and availability may decrease early next year when stocks are depleted. (b) Currently low prices may fail to stimulate Deyr season planting and this will have an effect on availability later on as well. (c) Demand inside and outside the region may increase.

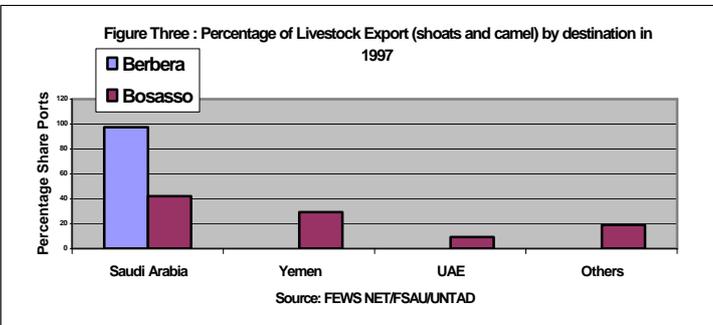


THE ONGOING LIVESTOCK BAN AND ITS IMPLICATIONS

Every year in Somalia, several million animals used to be exported to Saudi Arabia and other Gulf states, mainly from Berbera and Bosasso ports, primarily during the four month period leading up to the *Hajj*. These animals originated from all regions of the country and the Somali Region of Ethiopia.

In May 1983, Saudi Arabia imposed a ban on cattle from Somalia after the discovery of Rinderpest in the East African region. A few months later, from November 1983 until February 1984, Saudi Arabia then banned the importation of sheep and goats, due to concerns over dispersed infected diseases. Subsequently another two further import bans were imposed – the first in early 1998 and the second in late 2000 which continues to this day.

In the past, in a normal year, Somalia would have exported more than 3,000,000 heads of livestock. For example, in 1997 (considered a normal year) the total export figure was 3,458,771 from Berbera and Bosasso ports, of which 96% of the livestock were shoats, 2% cattle and 1% camel. Prior to the livestock import bans, Saudi Arabia was always the dominant market for Somali livestock receiving 98% of all their shoats, while Yemen and UAE together accounted for the remaining 2%. Figure Three shows the percentage of livestock export (shoats and camel) by destination in 1997.



The livestock exports trends have changed significantly during the ban – Somalia cannot now export any livestock or meat to Saudi Arabia. Instead livestock (and chilled meat) are being exported to the UAE and Oman and Yemen. Other trade is taking place but there are few official details.

As shown in the Table Two below, livestock export from Somalia started to improve during 2002. 652,227 heads were exported in 2001 and a total of 1,542,131 heads have already been exported in 2002. (January to September only) So within a year, export figures have almost doubled. However when a normal year (such as 1997) is compared with 2002 (January to September only), the export of livestock from Somalia has still decreased by 55% .

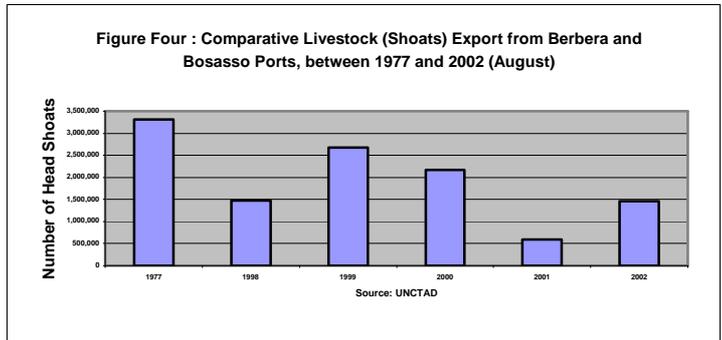
Table Two : Comparison of livestock exports through Berbera/Bosasso Ports 1997-2002

| | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 |
|----------------|-----------|---------|-----------|-----------|---------|------------------|
| Berbera | | | | | | |
| Shoats | 2,814,495 | 957,224 | 2,048,136 | 1,601,083 | 42,554 | 178,777 |
| Cattle | 66,939 | 92,213 | 89,967 | 63,263 | 13,962 | 14,936 |
| Camels | 50,587 | 11,663 | 37,430 | 16,984 | 2,660 | 12,354 |
| Bosasso | | | | | | |
| Shoats | 494,320 | 517,020 | 633,669 | 571,455 | 548,853 | 1,280,768 |
| Cattle | 17,831 | 29,492 | 36,586 | 27,604 | 42,248 | 47,050 |
| Camels | 14,599 | 3,938 | 15,544 | 8,177 | 1,950 | 8,246 |

Source : UNCTAD

** The Bold Figures for 2002 reflect the months January to September only.

It is estimated that two-thirds of the gross domestic production (GDP) for central and northern Somalia is based on livestock production and marketing. Despite the gradual resumption of exports, pastoralists have suffered from reduced income because of lost sales.



As shown in Figure Four shoat exports in 2002 (compared with a normal year - 1977) reduced 56 percent (from 3,308,815 heads in 1977 to 1,459,545 heads in 2002). In value terms, pastoralists lost 1,849,270 heads, which is the equivalent of US\$46,231,750. Not only have pastoralists lost sales, but their purchasing power has deteriorated as livestock prices reduced by up to 60 percent (from US\$25 per goat in a normal year to US\$10 per goat in 2002). Job opportunities have also been affected, particularly for herders, rural brokers, water suppliers, transporters, exporters, pen owners, animal care-takers, fodder sellers and veterinary personnel. This has also affected the ability of pastoralists to purchase imported commodities.

Traders have spared no efforts to find alternative markets. Egypt is beginning to accept shipments of camels and other livestock from Djibouti, knowing full well that many of them originate in Somalia or the Somali region of Ethiopia. Marketing initiatives have been created by traders who have installed slaughterhouses in Mogadishu and Galkayo, often in an unstable and insecure environment. Even though this type of business is new to Somali traders they have achieved it with unpredictable access to water, electricity and freezing equipment. FAO reports that the number of goats being slaughtered for meat is raising questions about the sustainability of supply. However, this new industry will probably never replace the number of live animals sold for the *Hajj*, unless small meat exports to India expand considerably in the next few years.

It is not known when the import ban will be lifted, but it is likely to take time for livestock health surveillance and inspection procedures to be put in place. The Middle East Commission of the *Office International des Epizooties* (World Body for Animal Health) made it clear at a recent meeting held in Tunis that the issue is not Rift Valley Fever, the alleged cause that triggered the livestock import ban. It is the lack of a credible system for effective health certification of livestock and livestock products. Such systems, which require a functioning and effective veterinary service take time to build.

Table Three : Livestock Exports September 2002

| BOSSASSO * | JUNE | JULY | AUGUST | SEPTEMBER |
|------------|--------|--------|--------|-----------|
| CAMEL | 883 | 820 | 170 | 650 |
| CATTLE | 5470 | 7610 | 7740 | 3,864 |
| SHOATS | 109900 | 121490 | 113300 | 69,308 |
| TOTAL | 116253 | 129920 | 121210 | 73,822 |
| BERBERA ** | JUNE | JULY | AUGUST | SEPTEMBER |
| CAMEL | 2658 | 1151 | 3589 | 921 |
| CATTLE | 1910 | 1752 | 2092 | 1,843 |
| SHOATS | 10378 | 12861 | 35233 | 30,089 |
| TOTAL | 14946 | 15764 | 40194 | 32,023 |

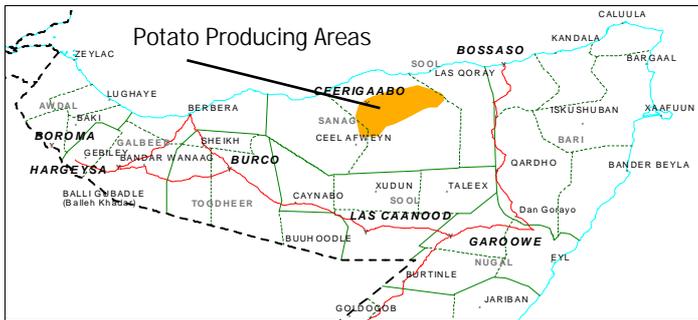
Source *: Bossasso Port Authority

Source **: Berbera Port Authority

POTATO PRODUCTION IS REVIVING SANAAG REGION

Sanaag region is located in the eastern part of Somaliland, bordering Sool region to the south, Togdheer to the west, Bari to the east and the Red Sea to the north. See Figure Four below.

Figure Four : Potato Producing Areas in Sanaag region



With a population of 150,000-200,000, Sanaag region is one of the remotest in Somaliland with almost no developed infrastructure. Unlike the neighboring lowlands, the Golis Mountains of Sanaag Region receives relatively good rainfall, about 300-400mm per annum. The Golis Mountain waterfalls are the source of numerous streams between the mountains that provide enough water for livestock and human consumption, as well as crop production throughout the year. In addition, the area has a unique cool climate, which is favorable to crop production, especially horticulture.

Four food economy groups (pastoral, urban, fishing, agropastoral) are found in Sanaag region but this article focuses on the agro-pastoral group who grow crops on the foothills of the Golis Mountains in Erigavo, Eel Afweyn and Badhan districts. Their livelihood revolves around horticulture and shoat keeping.

The Agro-pastoralists grow various cash and food crops such as potatoes, cabbages, tomatoes and onions and a variety of fruit crops from their trees. Farmers and key informants (nine interviews were carried out between 1-5 September) agreed that 50-60 percent of their land was actually allocated to potato farming.

Horticultural farming and potato production has been an important food and income source for the Golis agropastoral food economy zone in Sanaag region. Various joint initiatives/projects specifically aimed at improving potato production at the farm level were implemented by the former Somali government and donor agencies. It is noteworthy that the sector has expanded significantly even without

much outside attention over the past decade.

Potatoes, tomatoes and onions produced in the area could be made more profitable. There are good markets in the main towns of Somaliland and Puntland where demand is high. Supply from the Golis agropastoral zone reaches Erigavo, Burao, Laasanood, Garowe and Bossaso towns. The cash crop sector is, however, facing some serious constraints. These include water management and irrigation problems due to uneven topography, poor production and marketing skills (particularly for those who only recently turned to horticulture) and low farm-gate prices. Water run-off from the Golis Mountains erodes a significant part of arable land each season, to the extent that some households who previously owned relatively large farms are now in danger of losing their entire productive land. In the long-term, this may constrain the availability of productive land, particularly for those who cannot afford to own land through inheritance or purchase.

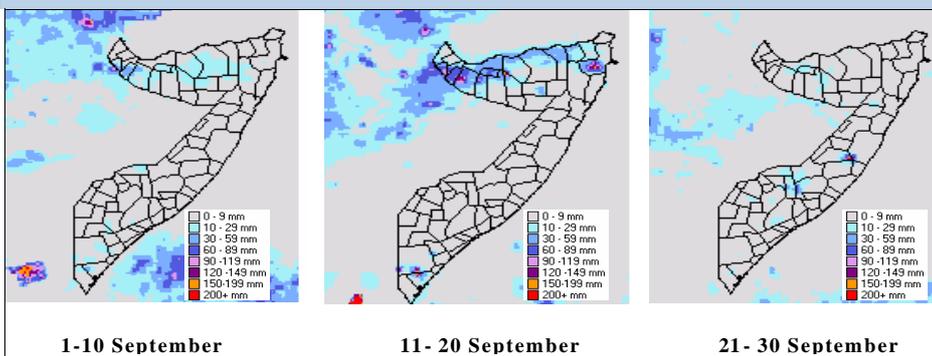
Of late, drought has been more frequent in neighboring prime grazing areas like Sool Plateau, Hadeed and Hawd ecozones, which host the largest livestock population in Somaliland. Consequently, many pastoralists experienced a reduction in herd size and often well below a sustainable level. This has resulted in a remarkable shift from pastoralism to agropastoralism. The number of poor pastoral households who joined the agropastoral food economy group continues to increase. The Golis agropastoral group also expanded with the advent of the first livestock trade ban by the Gulf states in 1998, when many households, in order to minimize risks, cultivated the neighboring fertile land and diversified their food and income sources.

CONCLUSIONS AND RECOMMENDATIONS

Horticultural farming in Sanaag region provides livelihood sources for a population of up to 25,000-30,000 people directly or indirectly through employment and trade. Horticulture has the potential to grow and employ even more people, especially poor pastoralists and small traders (mainly women) in urban centres. It is, therefore, important to explore existing opportunities in the sector and verify ways of tackling current constraints. This could be achieved in a more in-depth study (30-40 days) of the full range of viable economic options. The outcome could help decision-makers, local authorities, NGOs, farmers and traders in the region earn steady and remunerative income. For a copy of the complete report about potato-growing areas in the Golis Mountains, please contact:

mawdahir@fews.net or sidow@fews.net or alex.williams@fsau.or.ke.

EARLY DEYR RAINS COMMENCE IN THE NORTH EAST AND NORTH WEST



Satellite imagery shows light and patchy rainfall in the northwestern, northeastern as well as southern parts of Southern Somalia in the first dekad (1-10 September). However, in the second dekad (11-20 September) heavy rains were received in these two areas as well as the lower Juba Valley regions, particularly Afmadow, Kismayu and Jamame districts. In the third dekad, localised rains were also received in parts of Bay, Hiran and Galgadud regions. Field reports

confirm the early start of the *Deyr* rains. Agropastoralists and farmers are however concerned about the early start of *Deyr* rainfall and face a dilemma whether to plant early or not, as they are not sure about the rainfall pattern and are trying to avoid the cost of replanting due to uneven crop germination, given the high price of seeds. Normally the *Deyr* crop production contributes approximately 35 percent to the annual output.

UPDATE FROM THE REGION OF NORTHERN GEDO

Recently, elders have been meeting in Gedo region to discuss peace and a ceasefire is now in place in northern Gedo. The overall security situation is calm. Most of the traders and prominent leaders of all clans have returned to the main towns of Luuq, Dolow and Belet Hawa. Traffic is moving on the recently de-mined roads between north and central Gedo. Trucks from Mogadishu have started moving their imported commodities but very carefully and slowly. All imported commodity prices have increased—especially sugar which has reached 25-30,000 Ssh/kg - the most essential food for all poor groups in terms of energy at a time when they are extremely vulnerable. The livestock situation is poor with deteriorating pasture and grazing. Reduced milk yields have already affected the income and consumption rate of poorer groups—many depend largely now on purchasing. There appears to be a lot of movement of pastoralists—particularly to Bakol where the *Deyr* rains started early. Sporadic *Deyr* rains began mainly in Belet Hawa and parts of Garbaharey.

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

There are six main food economy zones in this region – namely, Hawd, Nugal, Sool, Iyah, Addun and Coastal. The area has suffered severe water shortages and pasture depletion due to the failure of the *Gu* rains thus prompting out migration and water trucking - which is abnormal during the *hagai* season. Four strategic boreholes are broken (Libaho, Sinujiif, Dangoroyo and Dhegenle) making trucked water the cheaper option. The *berkads* in Hawd, Sool and Iyah did not refill last *Gu*. Animal condition is poor and animals have died as a result of lack of water. Water prices have increased dramatically from 5,000 Ssh (\$0.4/drum) to 50,000-70,000 Ssh (\$2.25-3.2/drum). The number of saleable animals and their actual price have been decreasing while at the same time pastoralists have been accruing huge debts to pay for the increased price of water. However, the *Deyr* rains started earlier than usual on 6 September, in Gardo area and in the Hawd and Sool region. To save their livestock, pastoralists have moved their livestock to these areas incurring further debts as a result of transportation costs. In Iyah the rains commenced between 23-25 September. The rainfall will help ease the situation for all food economy groups because water (which has been so expensive) will now be available in natural catchments - improving animal body condition. However, milk production is not expected to increase because the conception rate of livestock was low during the last *Gu* and this has been compounded by the high abortion rate during the drought months of *hagai*. Also, many lactating animals have been wiped out by the drought particularly in the Hawd and Iyah. The terms of trade for pastoralists in the above mentioned areas are quite different to terms of trade in Garowe. For example shoat/sorghum : shoat/17.8-26.7 Kg (as opposed to Garowe where export quality shoat/sorghum : shoat/66 Kg) The terms of trade for water in the concerned areas is shoat/water : shoat/1.3-2 drums. This price is unsustainable and therefore pastoralists seek to purchase water on loans rather than selling livestock. In normal times the Terms of Trade for shoat/water might range from shoat : 25-40 drums.

SOUTH NUGAL AND NORTH MUDUG

Light rains fell in western parts of N. Mudug, which extends from Goldogob district to north western parts of Burtinle district. However, the price of water is still high (3,500-5,000 Ssh/drum – although the price has already dropped considerably) and pasture is improving – water availability has improved with 70-80% of *berkads* and *balleys* full. Livestock traders are beginning to export good quality animals through Bossaso port to Oman, Yemen and UAE. Rains have not occurred yet in Addun, eastern part of Burtinle district. Poor pastoralist households in the Addun area who stayed behind and were affected by the poor *Gu* are experiencing difficulty. There is some partially organized inter-community assistance in Burtinle district who are helping poor households by moving mainly shoats to western parts of the *Hawd*.

SANAG AND TOGDHEER

Apart from certain pockets both regions received *Deyr* rains earlier than expected during the first dekad of this month – although the intensity of the rains was not good enough to regenerate browse and pasture. Pastoralists in both regions started their normal seasonal movements. The *berkads* and *balleys* in both regions are half or fully filled - apart from certain pockets in the *Hawd* of Togdheer. The availability of pasture and water is still below normal. Gebi Valley which had been badly affected by drought has made a good recovery. The Sool Plateau of eastern Sanag received significant *Deyr* Rains in the first week of September. Rain improved the availability of pasture and water though livestock production is far below normal. There was a high mortality rate and rate of abortion during the last *hagai* – and pastoralists in this area will not immediately recover. The poor households within the Agro-pastoralist group and even middle wealth households failed to cultivate their farm lands due to the effect of crop failure in the past seasons. Only better off households planted.

NORTH WEST AND AWDAL

Rain continued in most parts of the region during September while the coastal belt remained dry and hot – rains are expected in the beginning of October. Pasture and grazing is considered normal for the time of year. The continuity of rains has significantly improved crop condition and the establishment of replanted maize and sorghum during the seasons of 2002. Crop harvest assessment will commence the third week of October. Water is available although the Karure borehole in Lughaya district and is still broken – hindering water availability in Karure district. Construction activities have contributed to employment in urban areas.

SOOL REGION

****Note Sool is an administrative region and the Sool Plateau is a geographical area and a food economy zone. In the latter there are 26,500 vulnerable people. The former covers mostly the Nugal valley where there isn't so much vulnerability, except the north-east corner of Taleh and parts of Hudun, which are in the Sool plateau.** Weather conditions in Sool region are encouraging as rains started early in the month, filling many *berkads* and *balleys* which helped to regenerate pasture. Milk production has improved and the price declined from 14000Ssh (litre) last month, to 9,000Ssh this month. The area of concern which covers the Sool plateau in parts of Taleh and Hudun districts continues to be of concern. It is estimated that around 9,100 people are unable to acquire their basic food needs, due to the ongoing drought and persistent water shortages. Households from Sool Plateau cannot move to Nugal because the pasture in the latter has been depleted and is awaiting rejuvenation from the *Deyr* rains. On the plateau, there is more pasture but no water causing people to switch expenditure from foodstuffs to this vital commodity.

BARI

(BOSSASO, ISKUSHUBAN AND B/BEYLA)

The overall food security situation was worrying in the Dharoor food economy group (Bossaso, Iskushuban districts) and Sool (Iskushuban) and B/Beyla districts). However in Dharoor food economy group localized *Deyr* rains occurred early in the month including in the grazing areas of Dharoor valley plains, Aboob and the areas of concern - Reebiyo and Ruuman depressions of Ur Aleed Sub-ecozone. Furthermore run-off water flooded the Dharoor valley plains creating favourable conditions but seasonal grazing plains in the coastal areas have not received rain so far. Water availability and accessibility is normal and most *balleys* and *berkads* have been refilled. Livestock condition is satisfactory but dairy production is below normal especially in camel herds due to poor calving rates during the last two wet seasons. However, a normal conception rate is expected this season. Seasonal livestock migration to the sub-coastal plains has not yet taken place. Migrated herds from Sool of Gardo returned home. Constraints to normal activities include delayed rains in traditional grazing plains of Noobir/Haluule compounded by increased tick infestation in Dharoor valley plains, where herds are concentrated at the moment. Migrated herds from Iyah of Nugal have not returned to their original destination. There has been an increase in cereal and sugar prices and increased transport costs after some roads became impassable due to the recent rains and run-off water. Food security improvements are likely to happen only if and when pastoral coping areas (sub-coastal plains) receive sufficient rains. Return of migrated herds from Iyah of Nugal will also lessen current stress. In the coastal areas (Bossasso district in particular) the food security situation is normal with the exception of the urban groups particularly the poor wealth group in Bossasso town who are vulnerable due to increased cereal prices and limited coping options caused by seasonal port closure. The summer season ended later than expected this month but in the next few days port activities are expected to resume and seasonal fishing. As the Bossaso residents return and port activities resume – this will replenish food stores. A consignment of rice and wheat had just arrived at port. More employment and fall in food prices is expected soon. Human migration to the fishing settlements from inland have just started and this migration has positive economic impact among the poor pastorals in Dharoor and Sool as well as poor urban because fishing activities contribute a great deal to household income.

>> P.8 REGIONAL FOOD SECURITY HIGHLIGHTS AS REPORTED BY FSAU FIELD MONITORS

HIRAN

The food security situation of the pastoral and urban food economy groups are normal while the agro-pastoral and riverine food economy groups are of great concern. The nutritional status of the poor and middle wealth populations in these groups are not usual – with many having no cereal stocks left at all – combined with their weak purchasing power. The poor rainfall in the last *Deyr* and *Gu* resulted in significant crop failure, pasture depletion and water shortages. These weather conditions caused abnormal and mass migration of the cattle in the agro-pastoralist groups towards Ethiopia and the southern regions of the Shabelle valley. Poor agro-pastoral and riverine groups are coping by taking out loans, kinship assistance, migration to urban centres and finally selling weak cattle at a low price when usually cattle are an asset. As these groups are close to water points they are not in such need of water trucking as compared to pastoralists. Improvements are expected with the onset of *Deyr* rains.

JUBA VALLEY

The poor households in the Agro-pastoralist food economy groups are the major concern particularly Southern Agro-pastoral which stretches from northern Jilib through Buale and Skow districts. This group experienced a severe reduction in *Gu* sorghum production due to an attack on their crops by birds. The other food economy group is the Southern Juba riverine : maize, sesame, fruits and vegetable. Their maize crop was infested with stalk borer which reduced yields particularly in Buale and Sako districts. Low production is just one problem but these poorer groups paid out a lot in proportion to their crop production and have debts to clear. They have little cereal stocks. The pastoral food economy groups are in good condition. Recent rains improved the availability and accessibility of pasture and water to above normal compared to the same month last year. In the Lower Juba agro-pastoral group, there was crop failure in Badade, Afmadou and Hagar districts, poor households have depleted cereal stocks.

GEDO

The food security situation in southern districts is normal as WFP distributed two months' free food in Garbaharey and Burdubo while CARE distributed in El-waq. From 24th – 25th there was unexpected rain fall that improved browsing and water availability in some parts Bardera and Burdubo. The current river level is significantly higher compared to September 2001 and the FSAU FM warns that there is a possibility of flooding in October/November 2002. Livestock condition is also normal except Burdubo where lactating cattle are dying from an unknown disease. Pasture and grazing are generally poor. Water is available and accessible with relative ease, except El-waq where livestock are crowding around hand dug wells and the only functioning bore hole (Busaar) in the district. Both river and rain fed farmers are preparing their farms for the coming *Deyr* season. An area of concern is Bardera - the food shortage has been caused by a poor harvest as result of reduced rainfall during the last *Gu* season. Populations are in ALERT situation and it seems to be worsening as the main trade routes in the area are either blocked due to security incidents or by rains-Dinsoor via Mogadishu road. The price of 1 kg of sugar has changed from 8000 Ssh to 16000 Ssh within the last two weeks of September. For FSAU information gathered on northern Gedo see page 6.

BAY

The Food security situation is normal due to the good harvest in the *Gu* season and more recently, *hagai* showers. Water and pasture availability are also good and production of milk and meat is normal. Early land preparation is providing agricultural employment for poor and very poor wealth groups. Agro-pastoral groups have good reserves. In addition food for work is being carried out by WFP and MCH supplementary feeding is being provided by UNICEF. There are still tensions in Baidoa following recent insecurity but this is not affecting surrounding districts.

BAKOL

The food security situation is slightly below normal due to the failure of crops in some districts in the last *Gu*. Social support programmes provided by WFP and UNICEF continue in Hud-dure, Rabdure and Elberde. These will help household food stocks. In Wajid town the poor and very poor urban households are suffering from poor income and lack of job opportunities and need close monitoring. There are also water and pasture shortages in Rabdure. Some rainfall was received in the last dekad of the month, in Tieglow, Huddur and Elberde area. These rains have helped replenish water catchments particularly in agro-pastoral and pastoral areas. Land preparation has begun providing agricultural employment for poorer households.

LOWER SHABELLE

The food security situation is normal due to the good availability of cereal stocks. Early *Deyr* rains were received in most districts of Lower Shabelle which improved water availability – and the water level of the Shabelle river is high, allowing access to gravity irrigation. In addition agricultural jobs have improved because of early *Deyr* rains. Animals are fetching a good price in the local markets because of the export possibility to Kenya. However, the unusually high price of sugar and beans has had a negative impact on food access in the poor urban as well as riverine areas. The most affected are the displaced people of the Qorioley and Kurtun-warey clan conflict who rely only on food purchase. In the irrigated area planting maize crop is in progress while in the main rain fed area land preparation and dry sowing is taking place. Household stocks are good.

GALGADUD

The *Gu* rains were poor and the region is anxiously awaiting the *Deyr* rains. On 26 there were some showers – however the region needs plentiful rain to recover from a difficult year. The body condition of livestock and pasture and grazing conditions are below normal for the time of year and milk prices are very high. Camel milk price varies from 10,000 – 12,000 Ssh (litre) compared with what is considered normal 3,000 – 4,000 Ssh. (litre) The dry season is a difficult time and labour opportunities are scarce – people are relying on collection of firewood, petty trade, remittances, hides and skin collection, salt collection, as well as searching for limestone and graphite as coping strategies. Although food availability in the markets is good, prices are high. Poor and very poor pastoral groups are receiving less money for labour compared to the norm and therefore their purchasing power has decreased. Good *Deyr* rains will go some way to alleviating the situation.

COWPEA BELT

The districts along the cowpea belt settlements are worsening due to declining access to food, water, pasture as well as livestock products and a low *Gu* 2002 harvest production. The rain fed agropastoralists in the poor and middle wealth groups are suffering a shortage of staple food and families are reducing their intake from two meals to one meal. They have poor purchasing power and reduced income opportunities. The FSAU Field Monitor suggests that food for work digging common water catchments and fixing windbreak trees may improve the situation. Families are splitting or migrating and going in search of work in Mogadishu or Jowhar. The fishing season starts shortly which may bring some relief. There is a shortage of water and its expensive. Current livestock condition is below normal compared to *hagai* 2001. The farmers along the cowpea belt districts are in land preparation although there is a seed shortage for cowpea and sorghum.

MIDDLE SHABELLE

No rainfall was received in the region during September but pasture and grazing conditions are normal. Animal body condition is normal as is milk production. It is expected that the *Deyr* rains will commence in October. Normal livestock movement in search of better grazing is taking place within the region. Agriculturally, households are busy with land preparation, ridging, planting and irrigation. River level is normal allowing gravity irrigation. Main constraint is canal silting due to lack of canal rehabilitation. Farmers cannot rehabilitate primary and secondary canals as heavy machinery is needed which is beyond their capacity. There have been no NGO's operating in this area in the last four seasons. Food availability and access is normal. Household stocks in both irrigated and rainfed areas are normal. The supply of cereals is low due to stock retention as a result of taxation – so cereal prices are higher than normal. Retail price of maize and sorghum has slightly increased by 2 percent and 3 percent as compared to last month.