



Food Security Analysis Unit  
Somalia

October 13, 2004

# Food Security and Nutrition

## October 2004 Monthly Brief

### Highlights

Climate

Markets

Nutrition

Agriculture

Livestock

Emerging  
Regional  
Issues

**Political Developments:** Recent progress towards forming a government in Somalia (elections of Parliamentarians and the President) will have profound effects on food and livelihood security. While the situation will be highly dynamic in the coming months, any increased civil security and rule of law resulting from these achievements would directly benefit vulnerable groups and overall livelihood security for Somali people. FSAU will closely monitor the livelihood impacts of these developments.

**Climate:** Early, above normal and widespread *Deyr* rains fell in several parts of drought affected northern pastoral regions resulting in increased water availability and improved grazing conditions. Central and Southern Somalia remains largely dry (page 2).

**Market:** Both the Somali and Somaliland Shillings continue to appreciate in reaction to positive political developments. If the trend continues, prices of food and non-food items may begin to increase, reducing the purchasing power of the poor (page 2).

**Nutrition:** Four areas are currently experiencing extremely high malnutrition rates which are significantly greater than the usual rates observed and far exceeding international thresholds for acceptable malnutrition: Lower and Middle Juba Riverine communities, IDPs in Bossaso, and Dhusamareeb and Adaado districts in Central all record GAM of roughly 20% (page 2).

**Agriculture:** *Gu* 2004 cereal production has now entered the main markets, pushing cereal prices lower. Households dependent on food purchases benefit from improved purchasing power, while income is reduced for net-cereal sellers. Agricultural activities are under way in preparation of *Deyr* cropping season, providing increased seasonal labour opportunities and improved income access for the poor in many parts of southern Somalia (page 3).

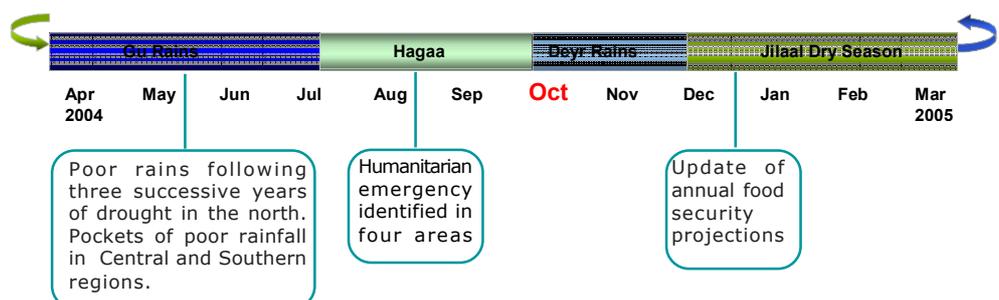
**Livestock:** In the north, the volume of shoat exports from Berbera and Bossaso is increasing, as well as the prices of export quality shoats as a result of the anticipated rise in demand created by the upcoming Hajj season. In the south, scarce water and pasture, combined with increased resource pressure from livestock migrated from Northeastern Kenya is pushing cattle prices down and leading to lower terms of trade (page 3).

#### Emerging Regional Issues :

- The humanitarian emergency in *central region is worsening* due to continuing civil insecurity around limited water, pasture, and land tenure.
- The *humanitarian emergency in Gedo and Juba Valley* is of continuing concern and a rapid food security and nutrition survey in the area is currently underway.
- Early, above normal, and widespread rainfall in *northern pastoral areas* has begun to improve water and pasture conditions in the region, however, it is still too early in the season to determine overall impact on emergency situation. Even with good *Deyr* rains, the livelihood crisis in the area will continue for several seasons (page 4).

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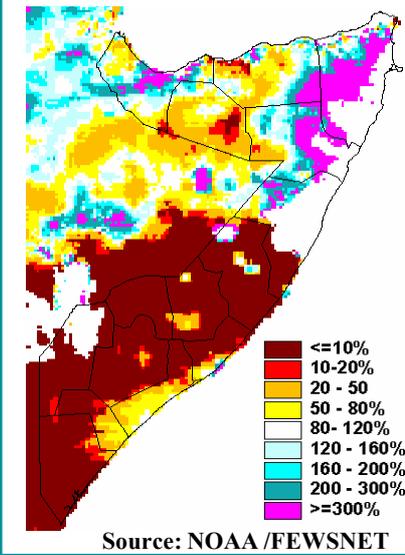
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Somalia Seasonal Timeline & Key Events

## Climate

**Fig 1: September Rainfall as a percent of long term mean**



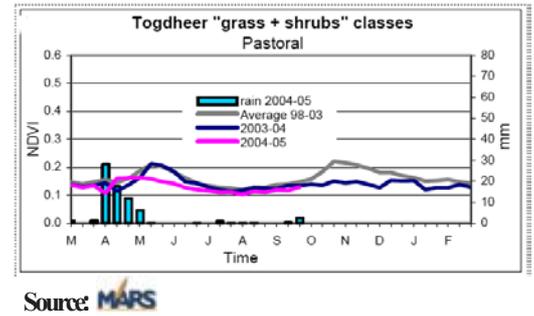
**D**eyr rains started early in most of northern Somalia. According to Meteostat rainfall estimates, significantly above normal rains fell over Bari, Nugaal and Sanaag regions (Fig. 1).

Rain covered parts of the drought-prone Sool Plateau and Nugaal Valley and the neighbouring Gebi Valley, resulting in large immigration of people and livestock.

Above normal rainfall fell over Sool, North Mudug, Togdheer and most of Somaliland. Heavy rains in the Golis Mountains in Sanaag (Erigavo and Elafweyn districts) caused severe damage. Good rains were reported from the Haud, including Ethiopia's Zone Five (Fig. 2). These early rains were adequate to increase the water level in catchments and *berkads*. Browsing and grazing conditions have also improved (Fig. 2).

The south was largely dry, apart from light showers over the coastal areas of Shabelle valley and parts of north Gedo (Fig. 1).

**Fig 2: Rainfall and NDVI for Togdheer**



markets - nutrition - climate

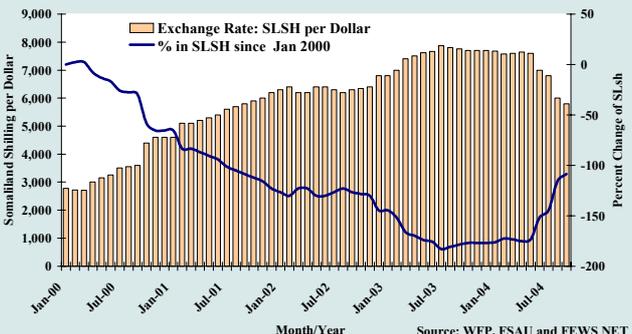
## Markets

**O**verall the situation is stable as the value of both the Somali and Somaliland shilling is appreciating in reaction to the positive political developments. If appreciation trend continues prices of food and non-food items, especially imported commodities, may begin to increase pushing up demand for local goods and reducing the purchasing power of the poor. Expectations, however, are high for increased remittances during Ramadan.

**Fig 3: Depreciation of Somali shilling in Mogadishu Market January 2000 to August 2004**



**Fig 4: Fluctuation of Somaliland Shilling in Hargeisa Market January 2000 to Sept 2004**



## Nutrition

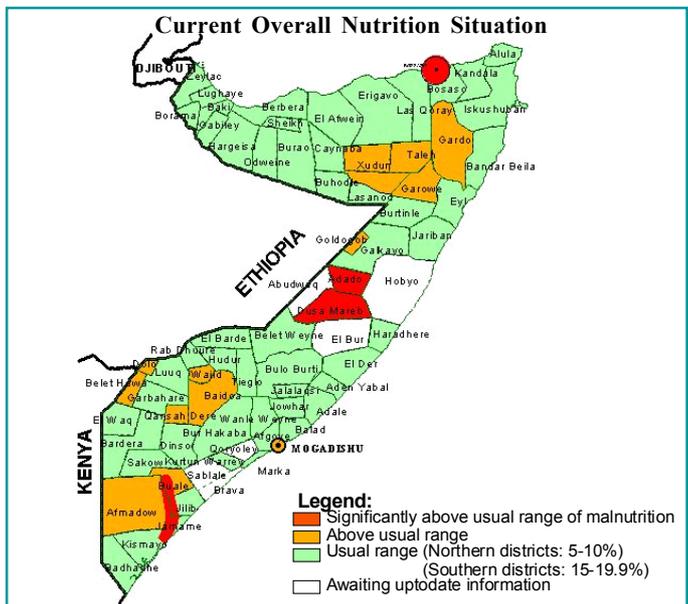
**R**ecent nutritional surveys flag the following areas of critical concern:

*Lower and Middle Juba Riverine communities* - Acute malnutrition levels and mortality rates are significantly above the usual range and categorize an emergency situation

*Dhusamareeb and Adaado Districts in Central Region* - A nutrition survey last month found malnutrition rates (GAM 20.5% W/H <-2 z score) and severe acute malnutrition rates (SAM 4.3% W/H <-3 z score) are significantly above the usual range and indicate a critical situation.

*Bossaso IDPs* - Preliminary survey results show a very poor nutritional status among Bossaso IDPs (GAM 20.3% and SAM of 4.3% in children ages 6-59 months). Analysis is ongoing.

*Mogadishu IDPs* - Preliminary survey results (based on WFH Z scores) indicate Global Acute Malnutrition of 15.8% and Severe Acute Malnutrition (SAM) of 3.2% in children aged 6-59 months.



## Agriculture

The bulk of the 2004 *Gu* production (maize, sorghum) in the south has entered into the main market channels, resulting in lower cereal prices in most markets (Figure 5). Low cereal prices are expected to persist until mid-*Deyr*.

Maize from Shabelle valley is being trucked to deficit regions where maize prices are higher. Local merchants are also hoarding this season's maize stocks in the production areas to gain from higher prices later in the year. Cereal prices in the north, i.e. imported rice, are high compared to rest of the country reflecting the higher costs associated with imported cereal commodities.

Various agricultural activities are under way in preparation of *Deyr* cropping seasons, thus generating seasonal wage labour opportunities (land preparation, sowing, and irrigation) that will benefit the poor who rely on seasonal labour for income. Favorable terms of trade (cereal to wage labour) is enabling better access to food for the Shabelle valley regions (Figure 6).

Cash incomes from sesame production and associated labor opportunities are enhancing livelihood options of Riverine and Agro-pastoral communities. Wage labourers in the sorghum belt have relatively high terms of trade, compared to other regions, due to both higher wage rates and lower sorghum prices.

Fig 5: Average Cereal Prices (aggregated across markets)

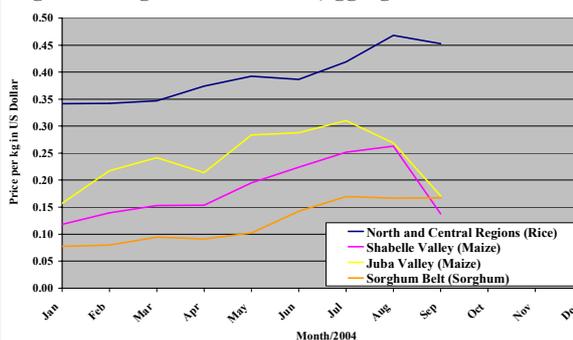
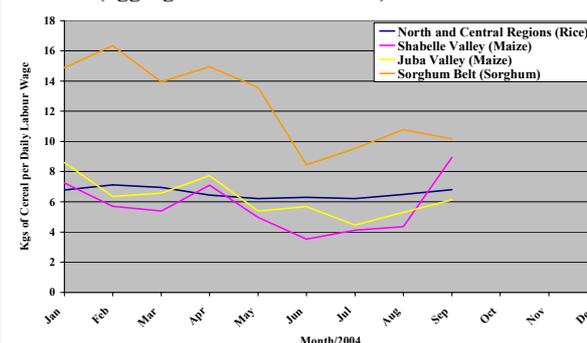


Fig 6: Terms of Trade Cereal To Labour (aggregated across markets)

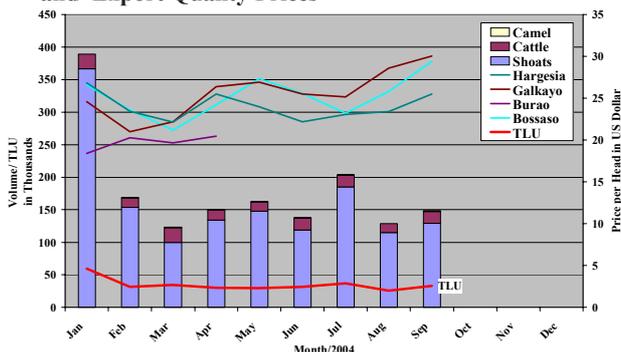


\* North and Central - Bossaso, Garowe, Galkayo, Hargeisa, Lasanod; Juba Valley - Afmadow, Buale, Kismayo, Jamame, Hagar; Sorghum Belt - Bardera, Belet Weyne, Hudur, Baidoa; Shabelle Valley - Afgoye, Merka, Qoryoley, Jowhar

## Livestock

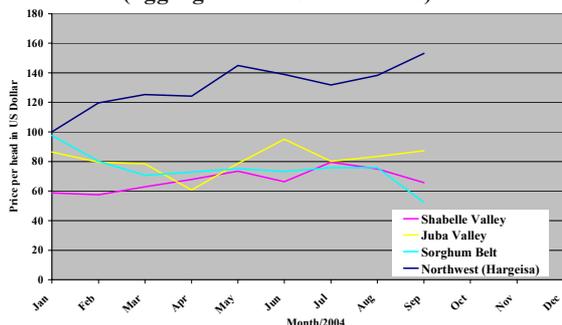
Livestock exports (sheep/goats) in September increased over last month by about 13 percent (Fig. 7). Port activities and livestock exports are expected to continue to improve over the next few months due to the approaching peak livestock export season associated with the Hajj.

Fig 7: Livestock Exports from Berbera and Bossaso and Export Quality Prices



\* \* Cattle exports average 800 per month, thus do not appear on the graph

Fig 8: Average Local Quality Cattle Prices (aggregated across markets)



Since July 2004, export quality shoat prices are on the rise in the selected markets of Bossaso, Galkayo, and Hargeisa, which is attributed to the anticipated rise in demand for livestock in the forthcoming Hajj season (Fig. 7). Terms of trade, rice to livestock, improved in certain areas of the north.

In the northern areas, pastoralists are moving livestock from drier to wetter areas in response to the substantial amounts of rainfall. In Bari, pastoralists who could afford to migrate have moved to areas such as Iskushuban and Qardho. Other migrations are to Burtinle and Erigabo areas.

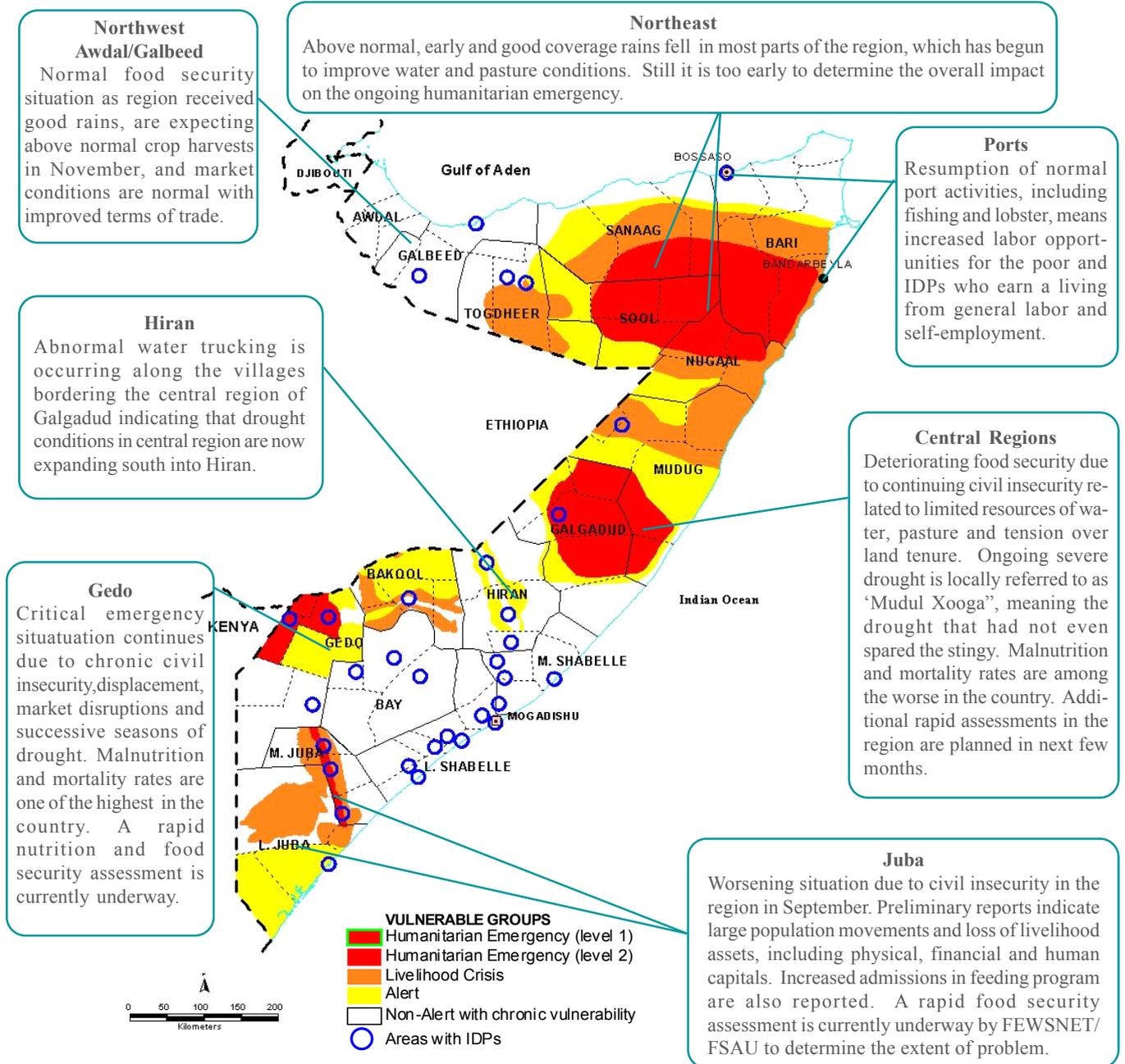
Reports from southern region of Gedo indicate that livestock from the area have migrated to neighbouring districts in search of pasture. Terms of trade, goats to sorghum, has deteriorated by about 36-40 percent in the area because of increasing cereal prices and declining livestock prices. This is further constraining food access, as pastoralists are selling more livestock to buy the same amount of cereal (Fig. 8).

Poor water and pasture availability in the Juba Valley is pushing pastoralists to wetter areas along the riverine and desheks of Buale, Jamame, and Kismayu. Although livestock in the area have a good body condition, the pressure on pasture and water sources has been exacerbated by livestock migrating from the North-eastern Province of Kenya. Livestock prices are deteriorating because of drought conditions and the state of insecurity in the area.

Cattle prices in Hargeisa, have increased dramatically since January this year (53%) and are now at an all time high of 153\$ per head. Appreciation in exchange rates only partially explains this large increase, as the SoSh and SiSh have both appreciated over this period by about 25% (24% for the SiSh and 26% for SoSh since Jan.). Further analysis is ongoing.

## Emerging Regional Issues

emerging regional issues



Source: FSAU Technical Series Report No IV.2, September 2004

### Recent Reports

Somalia Post *Gu* Analysis, FSAU Technical Series Report No IV.2, Sept. 21, 2004.  
 Monthly Nutrition Update, FSAU, Sept. 2004.  
 Humanitarian Assessment Report South Mudug and Galgadud Regions of Central Somalia, Concern, Sept. 13-23, 2004.  
 Galgadud Nutrition Survey Report, First Draft, Oct 2004.

### Current Surveys

Rapid Cross-Border Vulnerability Assessment - Juba Region and North East Kenya, FSAU/FEWSNET/ALRMP, Oct. 11-17, 2004.  
 Food Security and Nutrition Survey - Luuq District, Gedo, FSAU, Oct. 9-23, 2004.  
 Nutrition Surveys (FSAU, MOH, UNICEF, GHC, CARE, WFP, SRCS) in Bari, Sool and Bay Regions, pending Oct.-Nov. 2004.

### Workshops

Constraints and Opportunities for Marginal Lands Workshop in Somalia, EC, Nairobi, Kenya, November 23- 25, 2004.

**\*\* Agencies are encouraged to submit information on reports, surveys and forthcoming workshops to be highlighted in this section \*\***

