



# Monthly Food Security Report for Somalia



FEWS NET /Somalia

Issued 8 March 2001

Food Security Assessment Unit

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This report is a joint publication of FSAU and the USAID Famine Early Warning System (FEWS NET) for Somalia and for this issue, UNCU has provided valuable inputs to page 2.

## HIGHLIGHTS

- Somalia is now in the middle of the long, dry *Jilaal* season. A time when water for human and livestock consumption can become scarce and expensive. This season is unusually difficult for pastoralists as they have to move their animals increasing distances between depleting water and pasture resources. Milk production and livestock condition declines while expenditure on food and water increases.
- In northern and central regions (including Somaliland and Puntland), huge income losses have resulted from the Gulf livestock import ban placing enormous strains on household budgets. Organisations/agencies have been encouraged to make contingency plans to enable adequate access to food and water should normal coping mechanisms be unable to cover shortfalls amongst poorer pastoral and urban groups.
- Poor urban groups, including IDPs, in northern regions have also been severely affected by the Gulf livestock import ban by reducing income and employment opportunities. Those outside the remittance economy/network will be most affected.
- Short-term response preparedness is being advocated to cover for a potential sudden deterioration of the situation over the next 6-8 weeks and until the next *Gu* season. Medium and longer term action is required to mitigate the impact of this recession not only on vulnerable groups but also on the general economy.
- In the south, after the recent *Deyr* harvest, annual cereal production has been the second highest in post-war Somalia (320,000 MT). This year about 75% of annual production came from Bay and Lower Shabelle. However, while in the *Gu* most regions had reasonable production, in the *Deyr* season most rainfed areas, except Bay, had poor levels of production.
- Following the 2000 *Deyr* harvest, food security conditions remain generally stable in southern Somalia, though there are increasing indications of difficulties in localised areas. Areas of poor crop performance and wildly unstable currency are the main concerns. Cereal prices have risen sharply after remaining low for many months.
- Recent nutrition survey results from Dinsor and Berdale districts in Bay region have shown a very slow decline in malnutrition rates.

## Flash/Focus/Nutrition Report

FSAU will be issuing shortly:

- A **Flash** consolidating the impacts of the Gulf States Livestock Import Ban in the *Jilaal* season.
- A **Focus** on the *Deyr* 2000 crop harvest in S- Somalia.
- The **Nutrition Update** by mid-February.

## Limited coping options threaten Food Security for poor urban and pastoral groups in North and Central Somalia while the main agricultural areas of the South see a generally good *Deyr* harvest.

In the north of the country, access to labour will be a key issue for poor urban and pastoral groups as the loss of income from the collapse of livestock export market becomes more intense. Last week, the ILO revealed plans to build roads, develop water resources and encourage re-forestation projects. FAO & UNDP are encouraging private initiatives to re-activate the vital livestock trade (e.g. rehabilitation of a slaughterhouse in Burao). However, it is unlikely that these will relieve the increasing pressures facing the majority of households who normally

purchase the bulk of their food. Other proposed responses include livestock off-take schemes, improved access to cereals from the south and other interventions to keep local cereals affordable, as well as enabling affordable access to water. Normal coping mechanisms are in decline and the lack of cash and stocks normally accumulated to enable purchases at this time is preventing essential food access. Although consumption patterns have changed for many groups, the benefits of planned interventions will come too late. This precarious situation could result in a

sudden deterioration in access to minimum food needs for these vulnerable pockets of the population leaving relief food interventions as the final option.

The lifting of the livestock ban at this stage will have a limited impact and in the longer-term the loss of the export trade will continue to undermine the economy of the north and central regions. The south of the country is relatively unaffected by the Gulf embargo. The *Deyr* harvest has been good. Concerns remain in Gedo, Hiran, and in Middle Juba (esp. riverine groups). More information is available from the FSAU.

## CLIMATE OUTLOOK FOR THE 2001 GU SEASON IN SOMALIA

From 14-16 February 2001, climate scientists from the Greater Horn of Africa and from around the world gathered in Morogoro, Tanzania for the *Seventh Climate Outlook Forum for the Eastern Africa Sub-region*. Their aim was to reach a consensus on the climate outlook for the period March through May 2001 when the main agricultural season will begin for most countries of the region. The *Forum* examined, among other things, the evolution of the 1998-2000 La Nina episode and the current slightly cooler than average Sea Surface Temperatures (SSTs) over the Pacific Ocean as well as the SST anomalies over the Indian and Atlantic Ocean together with other factors that affect the climate of the sub-region. The seasonal forecast was made by

establishing probability distributions which indicate the likelihood of below-normal, near-normal or above-normal rainfall, using 30 years of historic rainfall data. The forecast for Somalia divided the country into two unequal parts.

For the southern tip of Somalia (Badhadhe and parts of Kismayo and Jamame districts) there is a 35 % probability that rainfall levels will fall in the above-normal category, i.e. within the wettest third of recorded rainfall amounts.

There is a 40% chance that rainfall will occur in the near-normal category and a 25% chance in the below-normal category. In contrast, for the rest of Somalia and neighbouring regions of Ethiopia and Kenya, the probability that rainfall will be below-normal is 35 %, with a 40 %

probability that rainfall will occur in the near-normal category. There is only 25 % probability that rainfall levels will fall in the above-normal category.

### Implications of Forecast for Somalia

In Somalia, the *Gu* season is the main cropping season during which about 70-75 % of the staple crops are produced. It is also the season during which the bulk of the natural pasture is grown and water catchments are filled.

The highest probability (40%) is for near normal rainfall in most of southern Somalia, during the onset of the *Gu* season.

For more information, pls. contact the source of this contribution:  
<http://www.meteo.go.ke/dmc>

## NUTRITION UPDATE

### Nutrition surveys in Bay Region

Recent nutrition survey results from Dinsor and Berdale districts in Bay region have shown global (total) malnutrition rates\* of 14.6% and 12.4% respectively. These results demonstrate a very slow decline in malnutrition rates in the region as demonstrated in the table below:

| Date     | Area Surveyed      | Global rate * |
|----------|--------------------|---------------|
| Aug. '99 | Baidoa town        | 22%           |
| Aug. '99 | Burhakaba town     | 28%           |
| June '00 | Burhakaba district | 22%           |
| July '00 | Baidoa district    | 17%           |

In the recent surveys, the incidence of respiratory tract infection and diarrhoea was found to be very high while utilisation of health services was low. While health related factors have undoubtedly influenced the nutritional status of the population, the probability that significant numbers of people are struggling to meet their basic needs as a result of asset loss due to drought and conflict needs to be considered.

### Gedo

A recent review of the nutrition situation and nutrition related interventions in Belet Hawa and Dolo, Gedo Region has prompted numerous initiatives. Among the most interesting of these are efforts by the Nutrition Working Group to produce standard guidelines for the management of supplementary feeding programmes and the need to develop a better understanding of populations who have experienced significant or total asset loss as a result of repeated droughts, insecurity and displacement.

### Lower Juba

A nutrition survey is planned for Lower Juba in late March. It is hoped that the UNICEF -led survey will involve other implementing organisations in the area and will produce a set of realistic recommendations and action points.

*Global malnutrition: wt/ht Z-score < -2 or oedema.*

For more information please contact :  
[noreen.prendiville@fsau.or.ke](mailto:noreen.prendiville@fsau.or.ke)

## HEALTH

The onset of the annual cholera outbreak has been very slow . (So far this year, 158 cases and 11 deaths recorded.) In addition to brief outbreaks in Adale, Brava and Merka, M. and L. Shabelle regions, MSF and ACF have now identified enough cases in Mogadishu to open their CTCs. ICRC has opened four ORS centres from which severe cases are referred to ACF. The number of Kala'azar cases identified each month continues to decline. It is possible that the epidemic has peaked or is affected by seasonal trends. As most cases are from southern Gedo and Bakol regions, there is concern for the lack of testing in the Juba regions given the absence of SACB partners there. No new cases have been identified in N-Somalia.

A reported outbreak of hemorrhagic fever in Tieglow, Bakol region, was investigated by UNICEF and WHO. The report indicated that severe malaria, possibly Black Water Fever, was the probable cause. No further cases have been reported.

## SEVERE STRESS ON POOREST GROUPS IN NORTH DURING CURRENT JILAL SEASON

### Summary

The Gulf import livestock ban has drastically cut income levels for most groups in northern Somalia, particularly those outside the remittance economy. The food security status in some pockets - poor urban and poor pastoralists (especially western *Hawd*) - has been steadily deteriorating and will reach critical levels over the coming 6-8 weeks. This season, when reliance on the market is normally highest and therefore the impact of the ban strongest, may see a sharp deterioration in food security, in what has so far been a gradual decline, bringing a wider range of the population in to the vulnerable category. Agencies must be ready to respond in terms of food and water as the dry season progresses and if it extends. (see *FLASH* for details).

### Expected Developments and Factors to Monitor

- Imported and local cereal prices - likely to continue rising
- Livestock prices - will continue to fall (until the next rains)
- Purchasing power - very low, to fall further
- Somalia shilling - likely to continue losing value
- Nutritional status - changing consumption patterns already

- noted; switching to cheaper cereals and reducing meals
- Timing of *Gu* rains - if late, will extend dry season
- Water availability - decreasing & prices rising (until next rains)
- Labour availability - will decline as more people seek limited job opportunities
- Ethiopian food aid - has been cheaply available in some border and inland areas of Somalia
- Remittances - have been increasing (but do not benefit all)
- Intensification of income earning activities - collection/sale of charcoal will cause environmental problems
- The development of alternative livestock markets.

### FSAU Recommendations

Possible interventions that could be targeted towards vulnerable households to help alleviate their food security status: a) livestock off-take initiatives, b) subsidize water for poor pastoralists, c) stabilization of local cereal prices, d) income diversification projects, e) subsidize/provide animal health drugs, f) subsidise transport, g) food aid

## VULNERABILITY OUTLOOK FOR SOUTHERN SOMALIA

Although, in general, food security conditions are stable\*, in southern Somalia only\*\*, certain indicators warn against complacency. The *Deyr* season just passed yielded a good national cereal crop, and combined with the excellent *Gu*, produced the second highest post-war annual harvest, 320,000 MT (incl. Central Regions). In addition, livestock conditions and marketing have been good, in the south, and conflicts have been localised.

Close to 75% of the total harvest is generated in Bay and Lower Shabelle, thereby disguising production failures in other areas. The recent *Deyr* rains mainly benefited Bay rainfed production, with the bulk of remaining production coming through irrigation. The previous *Gu* rains were generally well distributed, the exception being the Juba valley and Gedo. The good *Gu* production and associated low cereal prices since, helped to replenish household stocks in many areas and improved the availability and access to cereals. But the recent localised *Deyr* production fail-

ures and the importation of paper Somali currency have served to dramatically increase cereal prices (as well as many other commodity prices) in the last month. For those with stocks and assets this will not be an immediate problem. However, for many poor groups, who buy much of their food and have few assets this may well cause problems.

Given that there are still 5 - 6 months until the next harvest and that we are now in the middle of the traditionally harsh, dry *Jilaal* season where water and pasture shortages can cause high population movements and associated stress, preparedness and close monitoring are required.

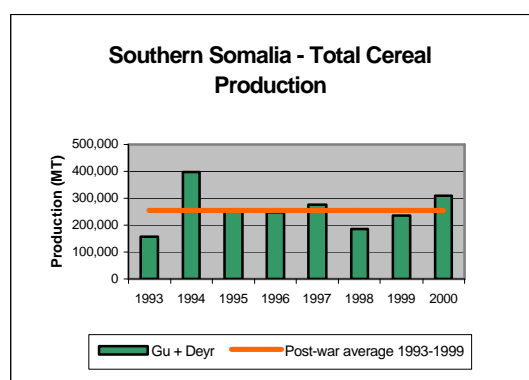
\*An important qualification is the relatively high malnutrition levels still being found in the south. These may or may not be food related problems.

\*\*Food security conditions are precarious in northern and central Somalia largely as a result of the livestock ban.

### Deyr Crop Summary

The recent *Deyr* season produced 96,000 MT (48% sorghum, 52% maize), significantly above the post-war average (78,000 MT). Like the *Gu* season production predominantly came from Bay and L. Shabelle (rainfed sorghum from Bay and irrigated maize from L. Shabelle) but unlike the *Gu* season, this *Deyr* saw significant production failures in most rainfed areas – N. Gedo, L. Juba, Bakol, Hiran, Middle and Lower Shabelle.

| Regions      | Gu 2000        | Deyr 00/01    | Gu – Deyr combined |                |                |
|--------------|----------------|---------------|--------------------|----------------|----------------|
|              |                |               | 2000/2001          | Post-war 93-99 | Pre-war 82-88  |
| Bay          | 79,700         | 31,840        | 111,540            | 72,098         | 106,610        |
| Bakool       | 6,290          | 1,221         | 7,511              | 6,312          | 7,803          |
| Hiran        | 7,500          | 1,975         | 9,475              | 13,674         | 21,225         |
| M/Shabelle   | 20,438         | 12,252        | 32,690             | 31,419         | 68,497         |
| L/Shabelle   | 77,490         | 37,325        | 114,815            | 85,456         | 164,510        |
| M/Juba       | 7,685          | 4,025         | 11,710             | 18,315         | 24,756         |
| L/Juba       | 4,233          | 1,828         | 6,061              | 11,112         | 24,073         |
| Gedo         | 8,972          | 5,495         | 14,467             | 14,256         | 22,659         |
| <b>TOTAL</b> | <b>212,308</b> | <b>95,961</b> | <b>308,269</b>     | <b>252,642</b> | <b>440,133</b> |



However, the detrimental impact of these crop failures is mitigated by stocks still left over from the *Gu* season and good health and marketing conditions for livestock. For more details see forthcoming FOCUS

### Impact of *Deyr* Season by general Food Economy Groups in S-Somalia (see p.5/6 for reg. Variations)

#### Pastoralists (in the South)

This group rely on the sale of live animals and the sale and consumption of animal products (milk/ghee) for their access to food and income. Herders in virtually all areas of southern Somalia have benefited from good rains in the last *Gu* (North Gedo being the main exception) and good rains in pastoral/grazing areas in the *Deyr* (again North Gedo is exceptional). Key Terms of Trade have been favourable for herders in virtually all areas due to the very low price of cereals for many months and the good livestock prices. Herders in southern Somalia are not seriously effected by the livestock ban and the Kenyan and local markets for livestock have been healthy. Instability of the Somali Shilling may be increasing the demand for livestock as a safe store of monetary value, further benefiting herders.

#### Agro-pastoralists

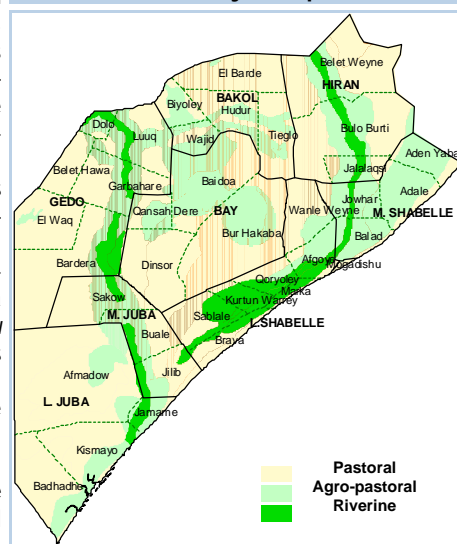
This group rely to varying extents on crop and livestock for their access to food and income. Poor crop production in most marginal rainfed areas (those outside Bay region) in this *Deyr* season is counterbalanced by stocks still held from the good *Gu* production, as well as good livestock health and market conditions in most areas. Agro-pastoralists from North Gedo have had the least opportunity to recover from several seasons of poor rains. Agro-pastoralists from M/L Juba who have suffered from poor crop production in some areas (in the *Gu* and *Deyr*) have had sufficient rains for livestock and have had good livestock marketing options in Kenya. Agro-pastoralists in Bay region have had 2-3 seasons of good crop production and recovering livestock conditions, but have had limited opportunities to convert their crop surplus in to income due to the low prices for sorghum in the region.

#### Riverine

This group rely predominantly on crops for access to food and cash. They have virtually no livestock. Riverine groups in L/M Shabelle (flood irrigated) and Bardera (pump irrigated) have fared well. In these areas farmers have been able to switch to cash crops – sesame, onions, tobacco – as a result of their good cereal stocks from the previous *Gu*. This positive situation is not the case in most other riverine areas where rains have been poor and fuel costs high (irrigation is only supplementary). Pests have also been a problem.

Riverine groups of particular concern are from Buale, Jilib and Jamine in M/L Juba where the *Gu* failed, as well as the riverine from N Gedo who have received limited rains in the last two seasons and have faced high fuel costs.

#### Southern Somalia: General Food Economy Groups



## LIVESTOCK BAN AND EXCESSIVE MONEY SUPPLY THREATEN LIVELIHOODS AND FOOD SECURITY

This section looks at increased vulnerability to food insecurity caused by the depreciating value of the Somali Shilling against the US Dollar. The main factors influencing this depreciation are the Gulf livestock import ban (reducing the availability of dollars) and uncontrolled influxes of Somali Shillings.

### The Money Supply and its Impact on the Economy

The inserted graph shows how the value of the Somali Shilling has fallen in the last 6 months (by about 50%). Since September, the major underlying factor has been the Gulf States livestock import ban, which dramatically reduces the availability of US Dollars in the local economy. Depreciations have also been caused by the printing of additional paper money. For example, in Mogadishu's main Bakara market, the Somali Shilling lost 11% of its value against the Dollar last month, (February) dropping from Ssh 13,000 in January to Ssh 14,500 in February, against the Dollar. It actually reached Ssh 15,500 briefly, before the Transitional National Government (TNG) made a deal with traders to purchase an estimated Dollar 4 m worth of Shillings. It is not clear how the government will prevent further imports of Shillings.

The impact of a devaluing Shilling is seen directly, by increasing the cost of imported commodities and indirectly, by increasing the cost of some locally produced goods. For example, rice, pasta, sugar and fuel have been going up in price for some months. As a result people have been switching from imported to cheaper local cereals. Three factors are therefore increasing the cost of local cereals, a) increased demand for local cereals, b) higher fuel and therefore transport costs, c) the increasing supply of Shillings in the economy. In February local cereal prices rose sharply in southern Somalia, after several months at stable low rates.

### Changing Trade Patterns

Usually, in the 60–70 days before the *Haj* period, the supply of imported commodities is high, as traders export animals and use the proceeds to import food and other items. The short-term prices of imported commodities for example, sugar, would normally decrease at this time of year and the value of the Somali Shilling against the US Dollar would temporarily increase. However, the disruptions to the money supply have changed trading patterns. It has been suggested that a lack of hard currency in the market has encouraged traders to invest in the printing of local money.

### Impact on Food Security by FEG and Wealth Groups

#### • Pastoralists—Northern and Central Somalia

Pastoralists in the north are very seriously effected. The value of their livestock (and therefore income potential) has fallen while

the cost of their required food items has risen. Pastoralists' market dependence is highest in the *Jilaal* (current season) when milk production from their animals is lowest.

#### • Pastoralists - Southern Somalia

As suggested in other sections of this report, pastoralists in the south have benefited from good terms of trade between livestock and cereals over the last few months. It is suggested that they may also be relatively better off during such currency instability as traders and people invest in livestock as a safe store of monetary value. In other words demand for livestock may increase at this time increasing its value. This will also benefit agro-pastoralists with sufficient livestock numbers.

#### • Agro-pastoralists

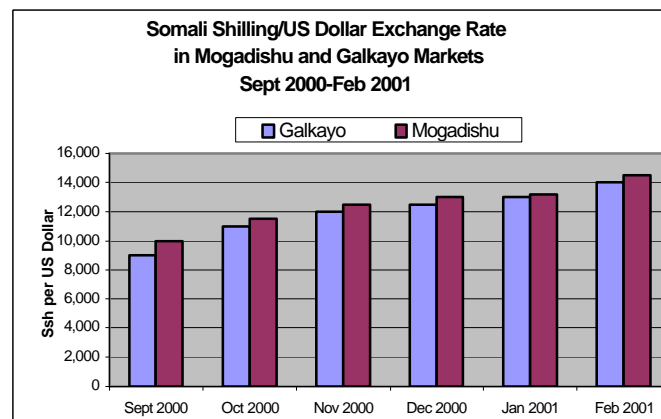
Having livestock and cereal stocks, this group may also be relatively buffered by this financial instability. Poor wealth groups who have few livestock assets and low cereal stocks, and therefore have to purchase their food will be most vulnerable to food price increases.

#### • Riverine Food Economy Group

Riverine groups in general tend to have reasonable cereal stocks at present. However, pump irrigated farmers have been facing increasing input costs as fuel prices increase. Again, poorest wealth groups may face difficulties with their limited stocks and dependence on the market.

#### • Urban Food Economy Group

Poor urban groups as well as those out of the remittance economy will be hardest hit by the rising food prices. Labour rates, a major source of income for poor groups, tends to lag behind commodity prices in inflationary situations.



## POOR/UNSTABLE TERMS OF TRADE FOR PASTORALISTS & LABOURERS IN NORTH/CENTRAL SOMALIA

Since the imposition of the livestock import embargo (the ban) terms of trade (TT) and purchasing power of pastoral and labour-dependent groups in northern/central Somalia, has been generally deteriorating. Prior to the ban and normally at this time of year (*Haj* season), one goat/sheep would exchange for at least one bag of rice (the main staple) or sugar.

Currently, rice has become out of reach for most poor households as its price has gone above pre-ban levels, while shoat prices (main liquidity source) are down by as much as 40%. In some places, pastoralists report that shoats fetch only the 'value of their skin' - euphemism for dismally low prices. Labour rates have dropped because most employment is

livestock-trade dependent. As the *Jilaal* progresses, this is expected to get worse. The devaluation of the shilling has also increased commodity prices, worsening the TT situation.

Food aid in Ethiopia, Zone V has increased cereal supplies in many border and some inland districts, reducing local cereal prices, allowing substitution, and improving TT for these groups. This transitory factor is mainly responsible for the observed improvements in TT in Galkayo, Garowe and Burao, in December-January. On the overall, TT are still worse than pre-ban levels and far below seasonal normal.

TT figures represent a comparison of prices and any discussion on the subject should be interpreted in light of the follow-

ing complications:

- The poor, who have few assets and usually buy goods in retail, do not normally have the ability to gain from a good livestock TT,
- It is not entirely true that everyone switches instantaneously to cheaper cereals when TT get worse; this happens with a lag and, in the meantime assets get drained,
- There are other essentials which are bought but are not reflected in the simplified TT figures. In the medium to longer term the relevant TT may be worse than usually. Therefore interventions should aim to support TT and purchasing power of affected groups.

## FOOD AID DISTRIBUTION

### January and previous Months

Since the last Gu harvest, about 12,400 MT of food have been distributed by UNICEF, CARE, WFP, ICRC in S- Somalia (Sep.—Dec. '00). Food aid interventions have drastically slowed down in January. WFP distributed 27 MT in Merca district (L. Shabelle region). UNICEF distributed 14 MT of fortified blended food (supermix) in Bay and Gedo regions. The assistance level is minimal compared to last year during the same period (1,700 MT distributed in Jan. '00). CARE, who contributed 75% of the food aid in December 2000 (mainly Gedo region) did not distribute in Jan. '01.

### February

WFP has been supporting the National TB programmes since mid-1999 by providing food rations to the patients in several hospitals and feeding centers. In February, WFP has assisted TB programs in Luug and Bulo Hawa (Gedo), Adale (M. Shabelle), Jilib (M. Juba) and also in the North-east and Northwest regions. Food for work interventions went on in Jamame (L. Juba) and in Bay and Bakol regions. Free food distribution was carried out in M. Shabelle near Jowhar (two burned villages affected as a result of conflict). CARE distributed 550 MT in Bay, Hiran, M. Shabelle and

Bakol region as Food for Work, and 693 MT as free food distribution in Gedo region. Food distributions through ACF Therapeutic Feeding Centers increased from 26,3 MT to 36,7 MT in February. This was largely due to increased number of moderately malnourished children being admitted into the therapeutic feeding clinics. Small scale interventions were carried out by ICRC towards IDP's and other vulnerable people, particularly in Jilib district in M. Juba region. UNICEF did not distribute any Supermix in the month of February. However, they provided non-food items to two burned villages in Jowhar.

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

### NW AND AWDAL

This month coincides with the *Kalilil* season which is characterised by extreme heat and high temperatures during daytime. With regard to the traditional calendar, length and severity of the *Kalilil* season depends on the *Todob* rains along the Oogo plateau between mid-February and mid- March. On the *Hawd* plateau south of Hargeisa, pasture availability is decreasing and hand feeding of remaining cattle and sheep with pods shaken from acacia trees, the main browsing for camels and goats, is very common. In the coastal and sub-coastal areas east of Lughaye, some of the pasture plants preferred by the cattle were either depleted or dried up earlier than normal. These phenomena resulted from severe overgrazing induced by heavier migration to the area over the past 3-4 months. Shorter distance migration of camels, shoats and cattle within the coastal/sub-coastal zones and in-migration herds of huge numbers were competing for pasture during past few months. Negative impacts of reduced food consumption levels are expected to surface soon.

### SOOL

All ecological zones seem to contain sufficient water for the *Jilaal* months. The general livestock condition is considered fair to normal except for less mobile stocks in Ainabo and lower Nugal areas, where an estimated 2,700 households are considered highly vulnerable to food insecurity due to lack of *Deyr* rains and to their reliance on sheep markets. High numbers of livestock present in the region have increased pressure on pasture and needs close monitoring. Pastoralists will rely on meat/milk consumption from camels and to a lesser extent from small ruminants as main food source. Despite declining milk production as a result of the growing distance between water points and rangelands and some cases of parasites infestations and respiratory diseases (without epidemic character), pastoralists cope through milk and meat production. Relatively high sales of stocks at lower prices, increased remittance flow into the region and WFP-FFW and self employment were observed. The coming months will show to what extent these coping mechanisms can still be stretched.

### SANAG AND TOGDHEER

The *Hawd* area and El-Afwein are considered the most food insecure areas in these regions. Livestock from these areas migrated to Zone V in Ethiopia in search of better pasture. The livestock ban combined with the high rates of inflation have had several negative consequences for the area: a) Reduced business investments. b) Reduced employment and income earning opportunities. c) Market prices for local and imported goods have increased. d) Reduced household expenditure as terms of trade deteriorate. e) The daily labour wage has decreased during the last 12 months from 3,4USD to 2,2USD. f) Increased consumption of wild foods. g) Livestock prices have fallen during the last 12 months (export quality shoats from 25 USD are being sold on the local market for 9-10 USD). The cost of local cereal has increased from the previous month due to reduced supply, increased local demand (which is normal for this time of the year), and high inflation rates.

### N-NUGAL AND S-BARI

TT have continued to deteriorate due to the livestock ban. High prices as a result of inflation and the *Jilaal* season are increasing stress on urban and pastoral households. For example shoat/rice TT have declined by 17-32%. The high inflation rates caused some traders to close their shops as market prices were so unstable while others increased the price of their goods. The high inflation rates caused street demonstrations in Bossaso. In Gardo district there has been an increase in food stealing indicative of the deteriorating situation. Many young shoats in Gardo did not gain sufficient weight during the *Deyr* and it is anticipated that many will be too weak to walk the increasing distances to water sources and will die along the journey. El- district remains the most food secure due to the good *Deyr* rains and the thriving lobster fishing. Livestock condition, production and reproduction are similar in Gardo, Garowe and El. Livestock are now moving to the dry season grazing areas. Goat milk is declining and many of the local quality goats are not physically fit as they have been exploited for milk for so long. Camel milk continues to be abundant.

### BARI

In this *Jilaal*, the lack of income through low livestock sales and the influx of new banknotes are increasing pressure on livelihoods and food security for the whole region. Normal pasture and grazing conditions and seasonal nomadic movements from the coastal grazing sites to their original destinations (Karkaar, Qoodad, Kodmo) were observed during the month. However, heavy tick infestation in Dharoor prompted abnormal livestock movement to Uraled and Karkaar. Production is considered normal but milk prices are very low due to inaccessible external markets. While water availability remained normal throughout the region, in Taager and Washington berkads dried up forcing villagers to buy water from tankers. TT remained unfavourable for pastoralists (1 goat fetched 25-30 kg of rice) and newly printed banknotes caused an increase of imported food prices of 10-15%. Pastoralists are coping through water sales, charcoal burning, fishing, credit and most importantly, the export of incense (↑ 120%). Poor pastoralists and poor urban FEG are becoming increasingly vulnerable to food insecurity.

### N-MUDUG AND S-NUGAL

The overall livestock population is estimated to have increased by 20% in the last rains. Livestock condition and production is slightly above normal, with the exception of Goldogob. Here, in the *Hawd*, berkads are empty and prices for watering herds increased to above normal. The increase in the livestock population has the potential to cause added pressure on water and pasture resources before the next *Gu* rains. Most of the milk (camel) produced is being consumed and is contributing to approx 50-60% of the households energy requirements. There are reports of camel pneumonia, high tick and mite infestation, which are expected at this time of the year. However, due to the pastoralists' reduced income levels many will be unable to treat their animals. There has been low market activity due to the unstable currency and therefore increased food prices. Tension grew between consumers and traders forcing some traders to close their shops.

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

The general livestock condition in the current *Jilaal* is weakened and production levels declined for all species due to deteriorating fodder condition. Deyr rains were sporadic in northern parts of the region. Fodder is currently available in riverine areas but grazing is limited due to Tsetse fly infestation. Continuing inter- and intra regional movements indicate the dry conditions in the area. While cereal availability has been good and prices low for many months there are concerns in northern Gedo about peoples' ability to purchase foods - low purchasing power and low asset bases may be the cause. Rainfed production was limited in northern areas and high input costs (fuel) and low producer prices (for cereals) may limit profitability for riverine groups

**JUBA VALLEY**

The riverine group continues to receive food assistance while a severe water shortage in Hagar has forced many families to move to Afmadow. Off season production of sesame, maize and cowpea from the flood waters of last November are starting to be harvested, which should ease the difficulties of the riverine group. Non-riverine households' food security status is considered near normal though poor rains and harvests in the last 2 seasons in many areas and high cereal and imported commodity prices are putting stress on all communities.

Alleviating the situation is the positive market conditions in Kenya for cattle from the Valley. However, cattle from agro-pastoralists and pastoralists are having to move away from the border to riverine area and other permanent water points (e.g. Afmadow). Milk production is therefore also low. Charcoal production has also been an important source of income for some time in the region, with obvious environmental implications.

**LOWER SHABELLE**

Deteriorating water availability and cattle conditions are of concern in this dry season. Some villagers have moved to improve access to water, while cattle diseases are increasing mortality rates in Afgoi. The recent *Deyr* season saw good irrigated but poor rainfed production. This is reflected in the above water and cattle problems. Other livestock, such as camel and shoats are fine. Access to food is considered good due to low prices, past production levels/stocks and other income opportunities.

Irrigation farmers were encouraged to grow sesame this season (*Deyr*) due to low cereal prices. Sesame harvesting is ongoing. Many rainfed farmers also rented or share-cropped land as a result of poor rains in their areas. Sesame and other cash crops (watermelon, tomato) harvesting is on-going and land preparation for the next season has started. The crop failure in rainfed areas, the demand from Mogadishu and M.Juba and the devaluation of the Somali shilling increased maize prices. A sharp raise in imported food items (sugar and rice) was reported. Population health is considered normal despite new cases of cholera.

**BAKOL**

Although the last *Deyr* rains have improved pasture and water availability in most parts of the pastoral food economy zone, the high potential agricultural areas received poor rains and a poor harvest. Although the food security situation in general is stable, due to the very good rains in the Gu, there may pockets of stress due to water problems and crop failures. Prices of livestock products were high because of market opportunities. Livestock are reported to be coming in to the region from Ethiopia (Kalafo). Cereals are available at affordable price in the local markets. Normal coping strategies (collection of firewood, wild foods, construction materials) are effective.

**BAY**

Good rains, crop and livestock conditions in the last 2-3 seasons continue to promote recovery from previous crises. However relatively high malnutrition levels (see nutrition section) highlight the need for further research to unravel underlying causes or problems. Localised poor rainfall and resultant problems need to be monitored closely e.g. Tigow, Somow and Barow Hussein Aden villages, but are assumed to be manageable given the generally good conditions in the region. Cereal prices have increased significantly, as in most areas, due to the influx of new Ssh notes.

Imported commodity prices have also increased for the same reason. Livestock prices remain good due to high demand from Garissa market in Kenya and Mogadishu. Job opportunities are normal. Self-employment activities (collection and sale of bush products) have increased which is normal during the *Jilaal* season.

**HIRAN**

Overall, food security status is near normal, though there are indications of developing problems, due to the poor rains and crop production in the past *Deyr* season. Pastoralists, with their browsing goats and camels are fine, while riverine and agro-pastoral groups with grazing (and browsing) animals (cattle) will be facing increased difficulties as HH cereal stocks are depleted and food and non-food prices are rising (new Ssh).

Dairy cattle moved further from settlements while lactating livestock have moved to the villages and towns to feed on the crop residues. Cereal prices increased by 30-40% compared to last month due to poor seasonal production, reduction of cereal supply from Ethiopia (food aid and production), and fewer FFW projects. Employment opportunities are below normal, the poor now relying more on self-employment (collection/sale of bush products).

**COWPEA BELT**

Rains and crop production (cowpeas and sorghum) were good in the *Deyr* as in the last *Gu*. Livestock conditions have been good though this area is affected by the livestock ban, reducing demand and value for livestock. Localised problems exist along the coast where pastoralists from Gawaan (Mahas/Dhusamareb areas) have arrived due to water problems in their areas. Decreasing water and pasture prompted the usual seasonal movements of pastoralists to better locations. However, below normal livestock body condition due to shortage of water and pasture increased the vulnerability of populations in the Addun and coastal belt areas. Coping mechanisms of this group will be highly constrained and they may not be able to adequately address household food security.

Water prices are rising as some water points in Elder, Adenyabal, X/Dhere and Hobyo have not been rehabilitated. The continued introduction of new Somali shilling notes increased imported items while local products remained stable.

**MIDDLE SHABELLE**

Normal stress factors associated with the season are evident: water levels are dropping, pasture and grazing conditions are deteriorating forcing cattle to gather in riverine areas and other animals to walk further between water and pasture/browsing. Irrigated production was good but rainfed production poor in the recent *Deyr* season. Old stocks, livestock access and other income opportunities compensate for the disappointing rainfed crop harvest. Maize harvesting is over but sesame harvesting is ongoing. Riverine households continue to do well and are able to grow high value alternative crops - sesame.

Assistance was provided to Barey and Bananey villages, burnt in clashes last month. Children are reported to be suffering from respiratory infection there. Local cereal and pulse prices have increased dramatically since last month, the influx of Ssh being the major cause. 1 local goat fetched 2 bags of sorghum and unskilled labour is worth 5 kg of sorghum. The price of charcoal decreased by 10 % due to over supply.