SOMALIA Food Security Outlook January - June 2009

- Over 3.2 million people (43 percent of Somalia's population) in urban centers, rural areas, and IDP camps require emergency assistance and livelihood support through June 2009.

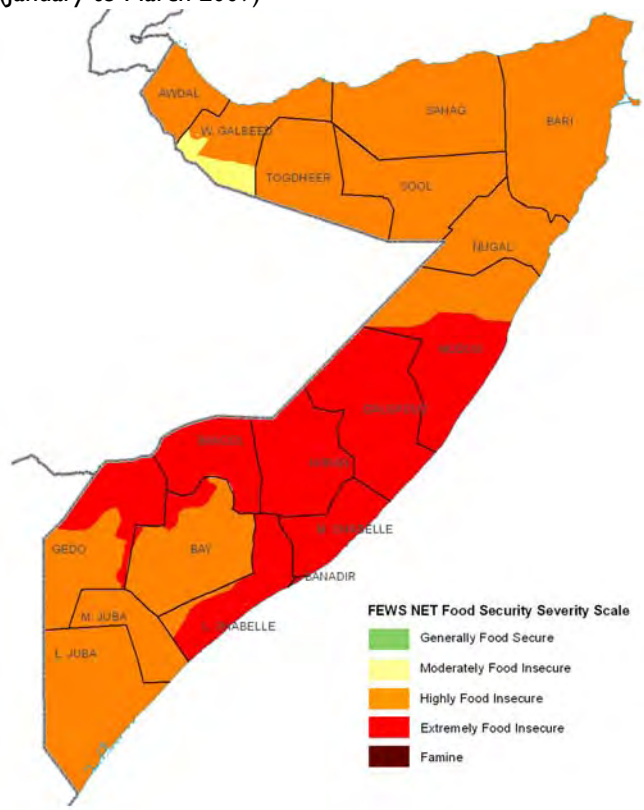
- An estimated 200,000 children under 5 years of age are acutely malnourished, of which 60,000 are severely malnourished and are at risk of death if they do not receive the appropriate specialist care. These figures are derived from recent FSAU nutrition surveys and translate to one in six children being acutely malnourished and one in twenty being severely malnourished.

- Due to increased armed conflict, political tensions, civil insecurity, and high food prices, large scale population migration, both internally and towards neighboring countries, is ongoing.

- The poor *deyr* rains or (October to December) led to another poor harvest and a significant cereal shortfall. In pastoral areas, dwindling rangeland resources continue to affect livestock conditions, productivity, and values, especially in drought-affected central regions.

- A *La Nina*, a weather phenomenon associated with poor rains, has been confirmed this year will likely affect the performance of the *gu* season (April-June), the country's main rainy season.

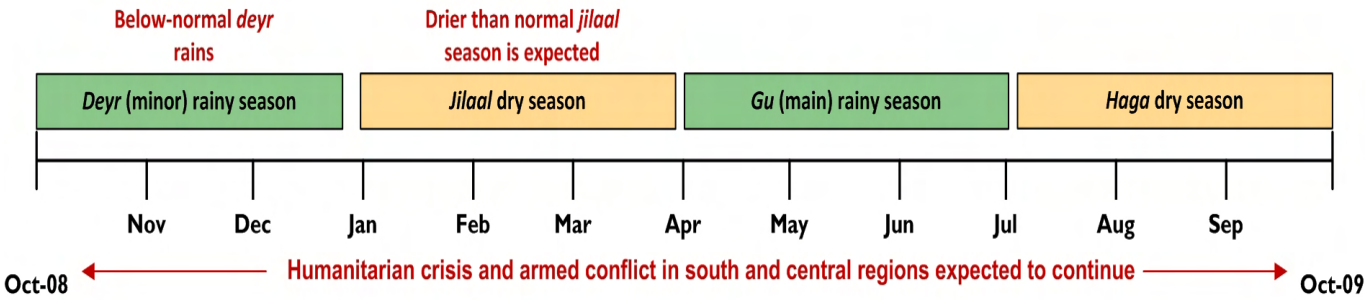
Figure 1. Current estimated food security conditions (January to March 2009)



Source: FEWS NET/FSAU

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Seasonal calendar and critical events



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Current food security situation

The findings of the recently concluded post-*deyr* assessment, led by FSAU, confirms that there is an ongoing and sustained humanitarian crisis in Somalia, with 3.2 million people in urban, rural and IDP camps in need of emergency assistance and livelihood support at least until June 2009. Over 90 percent of the rural populations in crisis are located in the south-central regions, the epicenter of the current political and humanitarian crisis. The overall conditions in the country are not expected to improve over the next six months as the delivery of humanitarian aid has become increasingly difficult as a result of increased targeting of aid workers, deteriorating civil security, political tensions, and renewed armed conflict. Sustained hyperinflation, sea piracy, and disruptions of market and trade activities, especially in south and central regions, continue to worsen food availability and access. Recent short rains (October to December) were also inadequate in most parts of the country and affected crop and livestock production, mainstays of the local economy. Rangeland resources are dwindling in many key grazing areas and the *deyr* harvest is 46 percent below the five-year average and 48 percent below the post war (1995-2007) crop production average. Although sorghum belt regions of Bay and Bakool had a near-normal harvest, the other regions in the south, where the bulk of annual cereal production occurs, experienced an almost complete short-rains crop failure. Following two consecutive years of below-normal rainfall, the poor short rains or *deyr* (October to December) have led to a cereal shortfall of at least 120,000 MT for the marketing year (July 2008 - August 2009) after accounting for commercial imports.

In pastoral areas, prices of all livestock species throughout Somalia have generally increased since January 2007, primarily in response to general inflationary pressure, the devaluation of the Somali Shilling, and high seasonal demand for *Hajj* and *Ramadan.* However, due to high cereal prices, pastoralist's purchasing power, as measured by the terms of trade between livestock and cereals, remains below normal levels, although it has considerably increased in all regions since October 2008 when cereal prices dropped marginally. The food security situation remains precarious in the drought affected pastoral areas of Central and Hiran regions, as well as in parts of Sool, Nugal, Juba, and Shabelle regions, where rangeland resources are dwindling, affecting livestock conditions, productivity and values. *Berkads*, water catchments, and most of the shallow wells in rural areas have dried up, forcing abnormal livestock migration to riverine areas, to neighboring regions, and to parts of Ethiopia.

Recent nutrition surveys conducted by FSAU and partners continue to highlight emergency levels of acute malnutrition throughout the country. Given the high and extreme level of food insecurity in most parts of the country, as well as limited access to healthcare, clean water, and adequate sanitation, rates of acute malnutrition remain above the 15 percent emergency threshold in many areas.From these surveys, an estimated 200,000 children under 5 years of age are acutely malnourished, of which 60,000 are severely malnourished and at an increased risk of death if they do not receive appropriate specialist care. According to the FSAU findings of these surveys, one in six children is estimated to be acutely malnourished and one in twenty, severely malnourished.

Although prices of staple food in most reference markets have declined slightly since October 2008, they are still 450-780 percent above normal, leading to highly food insecure condition in almost all urban areas, including the more stable northern region.The urban food insecurity crisis is growing and currently affects about 700,000 people, or 25 percent of the total urban population. Over 1.3 million IDPs are also affected by loss of income sources and exorbitant food prices. For instance, prices of imported rice and local cereals increased between 230 percent and 350 percent since early 2008. Because incomes have not kept pace with rising food and non-food prices, the purchasing power of the poor is significantly below normal while the average cost of the minimum expenditure basket needed by the urban poor for survival has more than doubled. As a result, poor households have switched to cheaper locally produced cereals and a reliance on commercial food aid. Skipping 1 to 2 meals per day and borrowing food from neighbors as coping mechanisms has also increased.

Most-likely food security scenario through June 2009

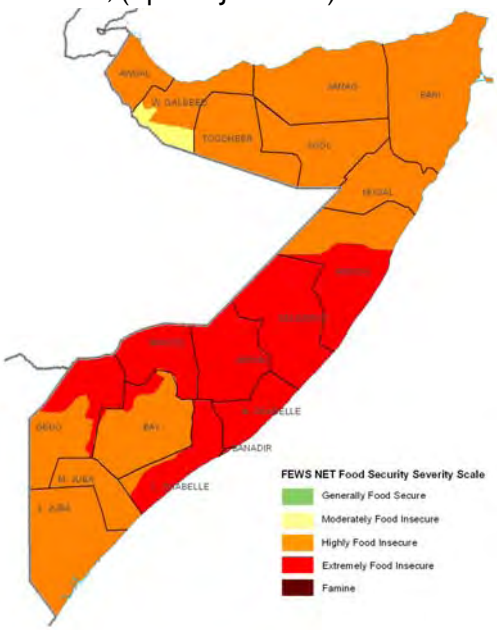
In the most-likely scenario through June 2009, food security conditions are not expected to change (Figure 2). Due to the poor *deyr* harvest, reduced import capacity, and the inability of food aid agencies to distribute relief food, food availability

at market and household levels will remain limited. With the exception of Bay region and parts of Juba valley, regions in the south and central regions (e.g., parts of Gedo, Bakool, Hiran, Shabelle, and Mogadishu) will continue to face extreme food insecurity. Trade flows and market activities are not expected to improve due to prevailing insecurity and prices of staple foods will likely remain high especially in urban centres, drought-affected regions, and marginal cropping areas like Hiran and parts of Gedo. Food access by poor agropastoral households in Juba, Shabelle, and parts of Gedo that experienced crop failure will not improve. Many households who rely on food aid and market purchases will continue to face difficult food access due to high inflation coupled with scarcity of imported commodities.

Though some improvements were reported in parts of Shabelle region, due to massive humanitarian response and improving food security indicators, declining humanitarian access will affect selective feeding programs, leading to likely increases in rates of acute malnutrition, especially among IDPs. However, given the brewing political tensions and civil insecurity, how aid agencies will deliver the much needed humanitarian assistance remains uncertain.

The number of internally displaced persons, especially in Galgadud and Afgoi corridor will remain unchanged. Most of these households are not willing to return to their homes in Mogadishu due to renewed conflict, the scale of distruction, limted relief interventions, the risk of unexploded ordinance, and poor social services available in the city. In turn, the IDPs will continue to put pressure on host communities. Meanwhile, increased civil insecurity, confrontation between clans and different religious groups and factions, resource based conflicts, banditry, and road blocks will result more refugees and internal displacement. The number of people from south and central Somalia seeking refuge, particularly in Kenyan refugee camps, will likely increase from the current rate of 9,000 per month. Already, significant cross-border population movement into Ethiopia, Yeman, Djibouti, and Kenya has been reported.

Figure 2. Estimated most-likely food security conditions, (April to June 2009)



Source: FEWS NET/FSAU

Table 1. Scenario assumptions and indicators, most-likely food security scenario

- increased conflict, political tention and armed confrontation
- Increased sea piracy and problem of commercial food import
- Below normal *gu* rains in most southern and central regions
- Distruption of trade flows within the country and across regional borders will remains problematic

In the most likely scenario the general decline in the terms of trade between livestock and cereals, due to a significant increase in the price of imported rice since early 2007, will continue to prevail. In drought affected regions of Central, Hiran, and Middle Shabelle and parts of the Sool and Nugall regions, livestock body condition will continue to decline due to poor pasture and water sources. As a result of the poor rangeland resources and harsh Jilaal season, poor terms of trade will persist. In the north and northeast on the other hand, good rangeland conditions and normal livestock trade, due to increased demand during the *Hajj* season, will enable pastoralists to continue their recovery from past shocks. Although increasing food prices and deteriorating terms of trade between livestock and imported cereals affects households' purchasing power, markets will continue to function and the movement of cereals and livestock within the region and across the border will remain normal. As such, the current food security situation in those regions especially in rural areas is not expected to deteriorate.

In the most likely scenario below-normal *gu* rains will increase the impact of the harsh *Jilaal* season leading to scarcity of water and pasture in central regions, parts of Gedo, and Juba where problems of water crisis and abnormal pastoral migration are reported. This will result increased competition for market access and resource based conflict. In this scenario, increased cross border livestock migration due to early depletion of pasture is more likely. Already Ethiopian pastoralists from Shinile zone have crossed into Awdal region of northern Somalia.

In this scenario, the number of people in need of humanitarian support in the country will remain same (3.2 million). Continued food aid in the form of free distribution and supplementary feeding programs in areas where child malnutrition rates are high will be crucial. Donors support for the 2009 Consolidated Appeal for Somalia, which aims to assist the most seriously affected vulnerable groups, will also be essential.

Worst-case food security scenario through June 2009

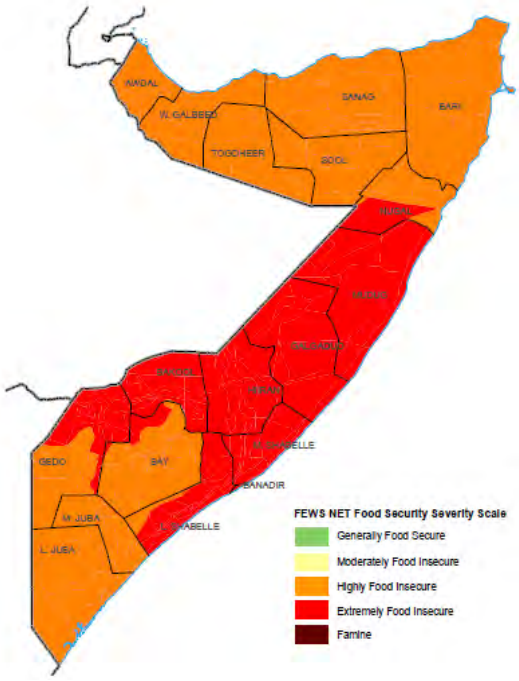
In the worst-case scenario, weather, markets and conflict hazards have an even stronger negative impact on food security than in the most-likely scenario, causing conditions to deteriorate further and pushing even more households into high and extreme levels of food insecurity (Figure 3).

Increased armed conflict, continued political tension, and civil insecurity will increase, in this scenario. Increased targeting of commercial vessels by sea pirates will also affect food and non-food imports. Throughout much of the southern and central regions, heightened insecurity already disrupts trade, economic activities, transportation networks, and humanitarian access. Further disruption of markets and internal trade activities will therefore spark additional increases in staple food prices. Food availibity in the markets and access for more households in rural, urban and IDP camps will, therefore, be constrained further. Cross-border trade also decline as neighboring countries, responding to heightened conflict in Somalia, increase restrictions on cross-border trade and population movement, also contributing to higher food prices. In this scenario, the prevailing levels of extreme food insecurity in Central regions, Hiran, Shabelle, Bakool and parts of Gedo regions will worsen. Food hoarding will start in areas with extreme levels of food insecurity and further increase of population movement into Kenya refugee camps is likely to continue

Increased targeting of aid workers will limit the implementation of much needed relief and recovery activities intended to mitigate the impacts of the poor *deyr* season, especially in south and central regions. Meanwhile, the limited presence of humanitarian workers will lead to reductions or postponements of projects. WFP programs in the south, where more than 2 million people are dependent on relief food, will be suspended in this scenario given a lack of security guarantees for their staff.

Gu (April to June) is the main rainy season in Somalia, contributing to about 70 percent of annual food and fodder production in most parts of the the country. However, a *La Nina*, a weather phenomenon associated with poor rains in the region has been confirmed this year. While the most recent data indicates that the *La Nina* is weakening, its effects could linger and contribute to erratic *gu* rainfall or a late start to the season, particularly in the southern and central regions of the country. In this scenario, *gu* rain failure would result major drought in central regions, Golis Guban, Nugal valley and Sool Plateau, key pastoral areas where the performance of the recent rainy seasons was below-normal.

Figure 3. Estimated food security conditions, worst-case scenario, (April to June 2009)



Source: FEWS NET/FSAU

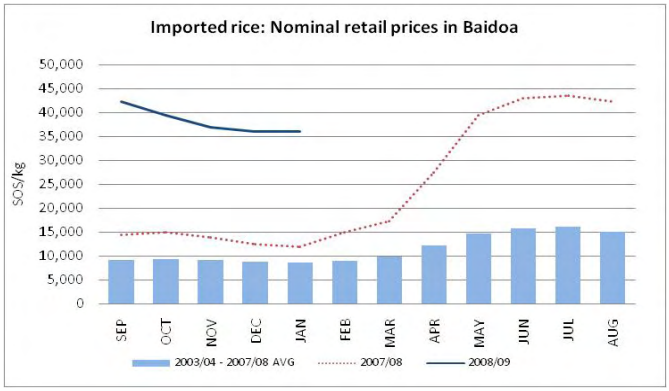
Table 2. Scenario assumptions and indicators, worst-case food security scenario

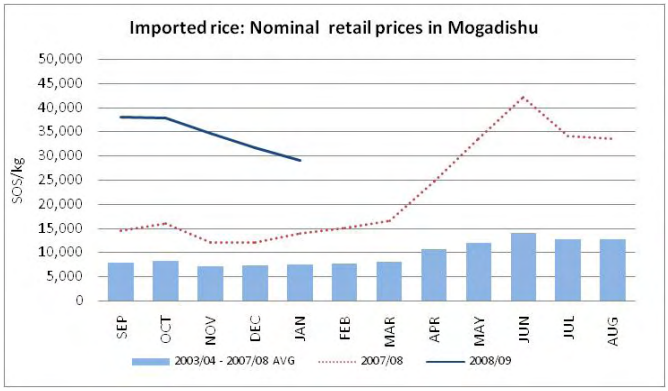
- Complete *gu* failure throughout the country deepens drought in central regions
- Large scale armed conflict between opposing groups results more displacement and increased cross border population movement
- Increased targeting of aid agencies, disruption of markets, and trade activities
- Increased sea piracy affects import capacity leading to further prices increase in staple commodities especially in urban area

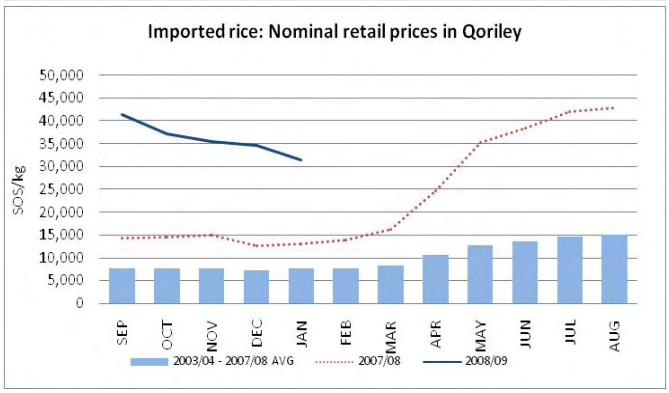
As a result of these conditions, the humanitarian emergency in Somalia will deteriorate further, especially throughout the south and central regions, while spreading into parts of north and northeast that are now only moderately food insecure. In this scenario, more severe levels of malnutrition and child mortality and massive human migration into the neighbouring countries will occur. The number of people requiring humanitarian assistance could therefore increase to more than 3.5 million or over 50 percent of the Somalian population. Extremely critical emergency interventions, including additional food aid, will be needed, specifically targeting households in areas facing high and extreme levels of food insecurity including IDPs, the urban poor, and drought affected pastoral and agropastoral communities.

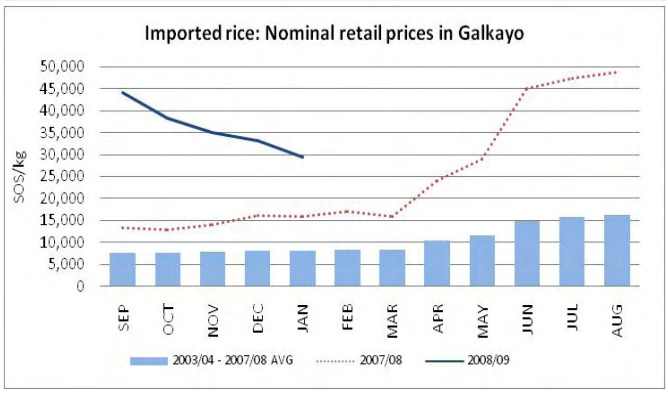
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

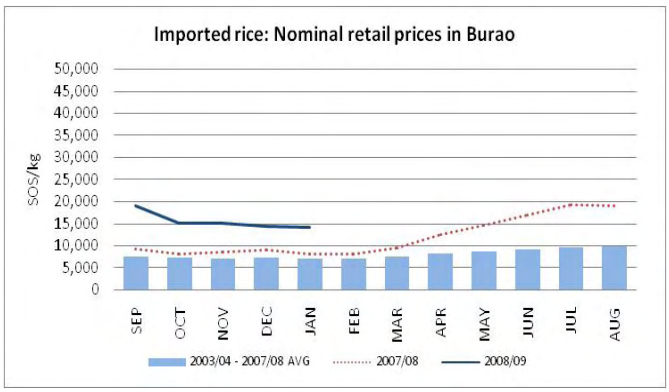
Maize, sorghum and rice are the most important staple food commodities for Somalis. Maize and sorghum are the preferred staple foods consumed in agriculture areas, while rice is more popular in pastoral and urban areas. Local and imported cereals are available in the markets, but supply typically varies with the season. Mogadishu is Somalia's largest market with connections to most other markets in the country. Baidoa presents a significant sorghum producing and consuming area; this is the heart of Somalia's "sorghum basket." Qorioley is a large maize production area. Galkayo/Dhusamareb and Burao are exclusively pastoral where people depend on the purchase of both domestically produced sorghum and imported rice. Togwajale is a sorghum producing area with links to Ethiopian markets; most of the cereal that flows from Ethiopia passes through this market. Hargeisa is the capital of Somaliland and an important reference market for livestock trade with Ethiopia. Buale is located in an important maize production area in the southern region, and supplies most nearby markets.










Imported rice: Nominal retail prices in Burao
SOS/kg
50,000
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
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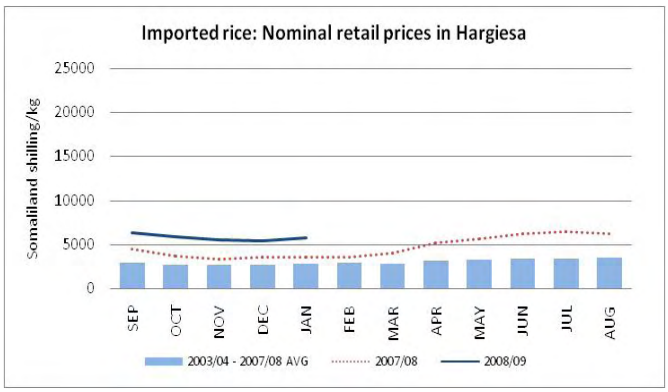
Imported rice: Nominal retail prices in Hargiesa
Somaliland shilling/kg
25000
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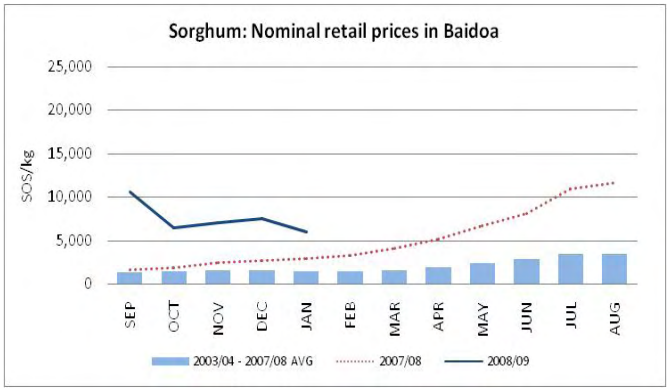
Sorghum: Nominal retail prices in Baidoa
SOS/kg
25,000
20,000
15,000
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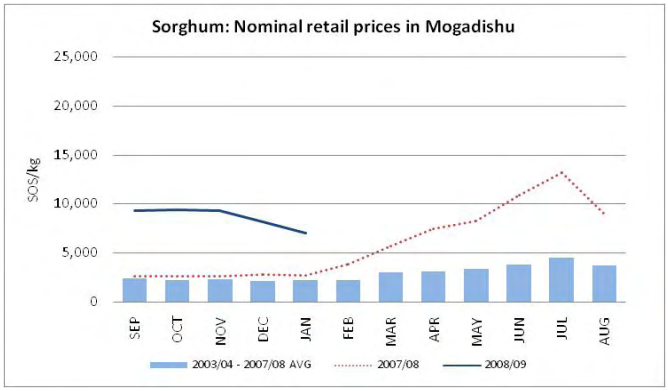
Sorghum: Nominal retail prices in Mogadishu
SOS/kg
25,000
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15,000
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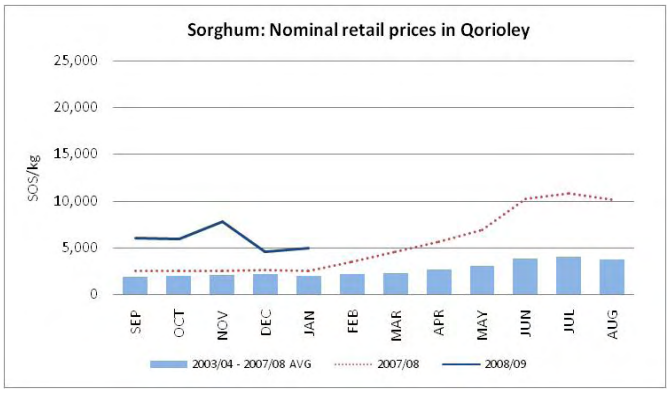
Sorghum: Nominal retail prices in Qorioley
SOS/kg
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20,000
15,000
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2003/04 - 2007/08 AVG
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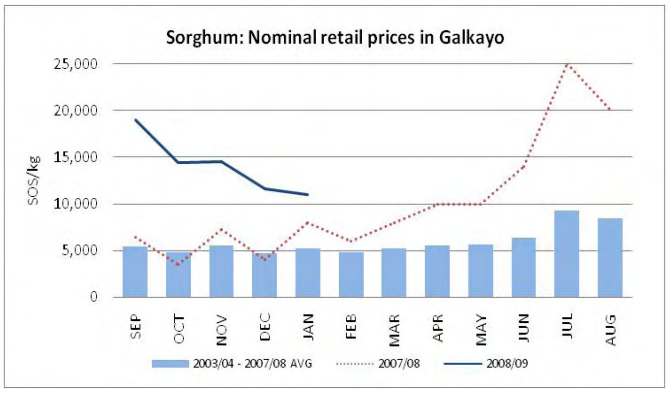
Sorghum: Nominal retail prices in Galkayo
SOS/kg
25,000
20,000
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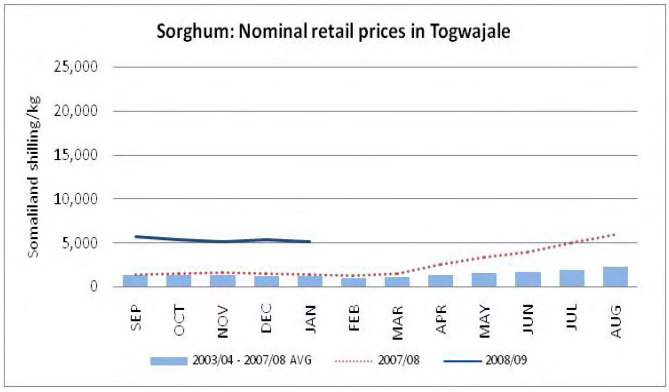
Sorghum: Nominal retail prices in Togwajale
Somaliland shilling/kg
25,000
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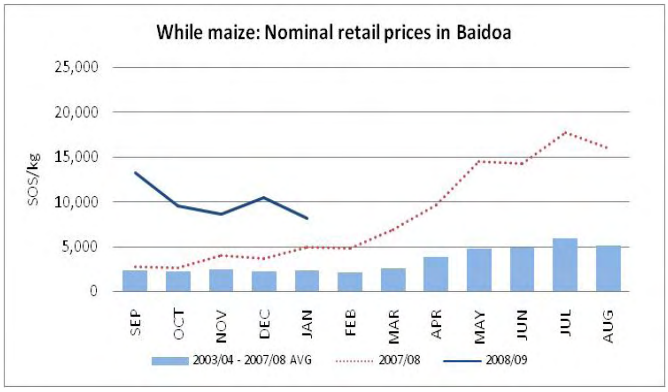
While maize: Nominal retail prices in Baidoa
SOS/kg
25,000
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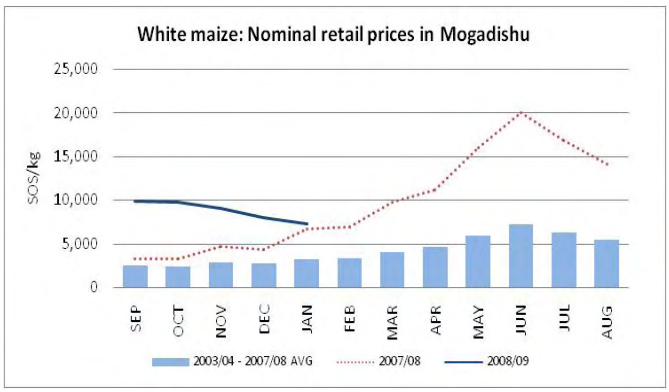
White maize: Nominal retail prices in Mogadishu
SOS/kg
25,000
20,000
15,000
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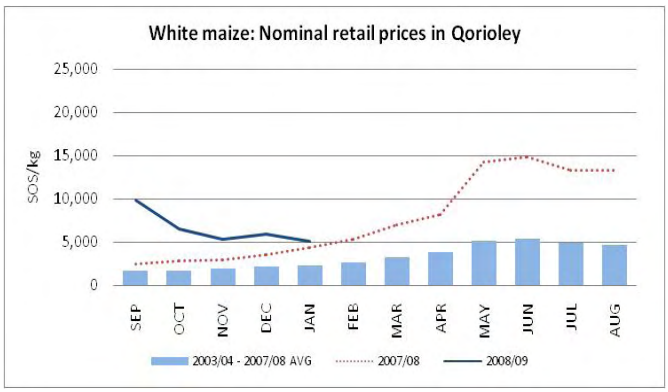
White maize: Nominal retail prices in Qorioley
SOS/kg
25,000
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15,000
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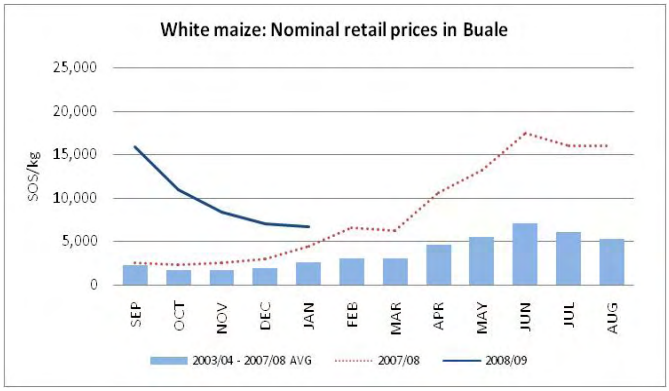
White maize: Nominal retail prices in Buale
SOS/kg
25,000
20,000
15,000
10,000
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