SOMALIA Food Security Outlook — January to June 2010

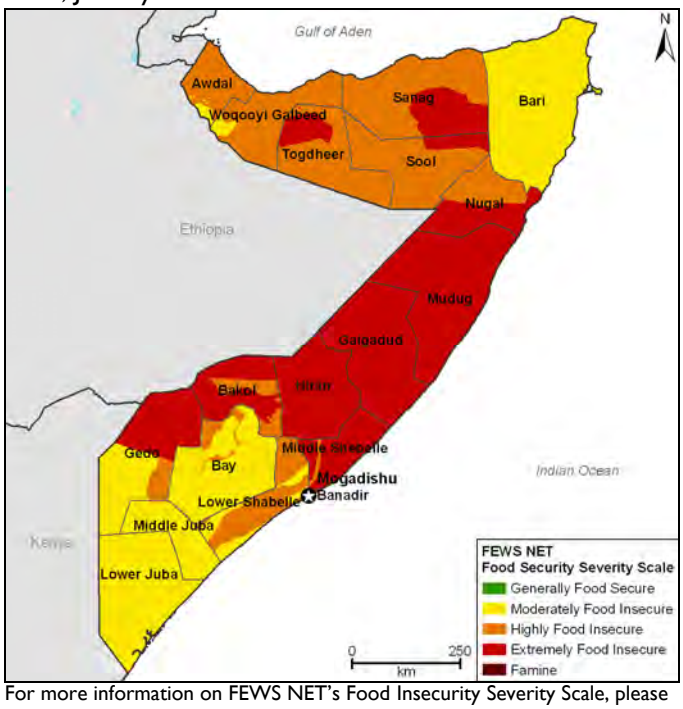
- Findings of the recently concluded 2009 FSNAU-led multi-agency post-*deyr* seasonal assessment indicate improving overall food security situation in the country, especially in rural areas of the south. As a result, the number of people in need of emergency humanitarian assistance and livelihood support has dropped to about 3.2 million.

- The performance of the 2009 *deyr* rains was largely normal in the southern agricultural regions. However, the season performed poorly pastoral regions of the central, north and northeast parts of the country, resulting in a deepening crisis in the key pastoral livelihood zones of Hawd, Addun, and Sool Plateau.

- Food insecurity and relief needs will persist between January and March, especially in Hiran, parts of Sool, Sanaag, most of Galgadud, and parts of Mudug regions where *deyr* rains completely failed or were extremely poor. Despite some potential improvements once rains begin in April, life saving assistance and livelihood support will be needed through June.

- Given the normal harvest and increased availability of water and pasture, sustained improvements in food access among pastoral and agropastoral communities are expected in the south.

Figure 1. Current estimated food security conditions, rural areas, January 2010

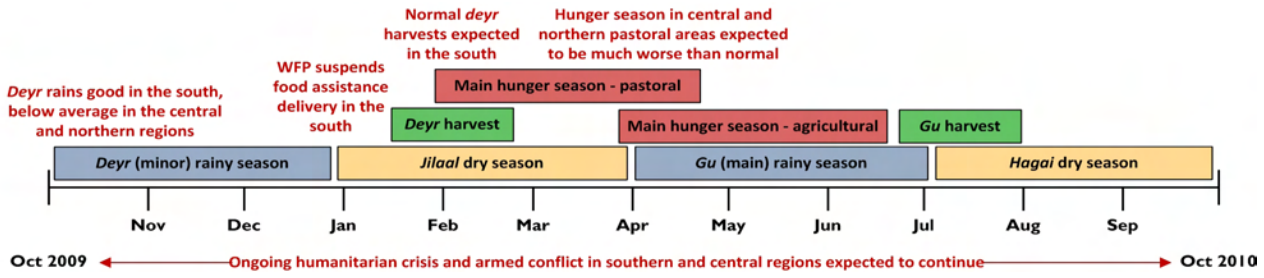


For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: *FEWS NET/FSNAU*

- Even with the above average *deyr* harvest in the south, the temporary suspension of WFP food assistance and associated price speculation, coupled with the collapse of Mogadishu's Bakara cereal maket (an important national buffer stock), has led to unseasonably high cereal prices.

Seasonal calendar and critical events



Source: *FEWS NET*

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Current food security conditions

The findings of the recently concluded FSNAU-led multi agency seasonal assessments indicate an improving overall food security situation, especially in most rural areas of the south, where the performance of the *deyr* rains were largely normal. As a result of the normal rains, crop harvests are above average while livestock productivity and value continue to improve. In turn, this has led to improved access to food and income in rural livelihood zones. In particular **Gedo, Juba, Bay, and Shabeele regions** have experienced significant improvements in food security. Good *deyr* rains have replenished water reservoirs, enhanced rangelands and animal body condition, and resulted in good harvest. Market supplies of staple cereals are expected to increase as the harvest enters the market starting in mid-January. However, due to the increasing demand for cereals and the fact that a large number of small traders and rural assemblers from the central and northern regions have placed their orders directly with famers, cereal prices (both farm gate and retail) have shown an unseasonable increasing trend. For example in Qorioley market, compared to the same month last year, sorghum and maize prices increased by 83 and 31 percent respectively, while the price of maize in Buale increased by 15 percent during the same period. Other areas where *deyr* 09 rains were normal (hence improved crop and livestock production) and where food access and availability improved remarkably include the cowpea belt and coastal districts of **Eldher, Elbur, Harardhere and parts of Hobyo district of central regions**. The overall number of people in need of assistance, therefore, has dropped from 3.6 million (June 2009 estimate) to about 3.2 million.

Despite El Nino-related predictions of above-normal rainfall, *deyr* rains were poor or failed completely in **Hiran, parts of Bakool, the Hawd and Addun** pastoral livelihood zones of **Galgadud and Mudug regions,** most of the **Sool plateau (Sool and Sanaag regions)**, and northern parts of **Bari region** leading to a deepening crisis in these regions. In parts of **Sool** and **Nugaal** regions of the northeast, relatively better rains brought short lived improvement in pasture and water availability. However, they have also attracted abnormal livestock in-migration from neighboring rain-deficit areas and information from the field confirms that rangeland resources (water and pasture) in both regions are being depleted earlier than normal. Concern is also growing in parts of Northwest regions (**Awdal and Hargeisa**) where the quantity and distribution of the *Karan* and *Hays* rains were poor. In particular, the food security situation is rapidly deteriorating in parts of **Sanaag** region where the performance of the current *deyr* and last *gu* season were extremely poor. The drought has negatively affected water availability leading to resumption of water truckking for humans and livestock, especially in eastern **Sanaag**.

Conditions in **Mudug**, **Hiran and Galgadud** regions in central Somalia are also of particular concern, with 70 percent of the population in those regions in need of urgent humanitarian assistance**.** Renewed conflict between armed groups and the mobilization of militias in these drought-affected regions has caused a new wave of civilian displacement among communities already affected by six consecutive seasons of drought. The recent failure of the 2009 *deyr* rains, especially in the **Hawd** and **Addun** pastoral livelihood zones, has resulted in a complete loss of livestock assets, especially sheep and goats. Levels of destitution remain high in most pastoral settlments and in the small towns where households move in search of food and water. Unconfirmed reports suggest that more than 20 destitution camps exist in **Guriceel, Abudwak and Mareer Gur** areas of Galgadud region due to loss of livestock assets. The condition of remaining animals in terms of body conditions, reproduction, and milk production is very poor. The loss of income from livestock and livestock products has caused food access to deteriorate substantially for poor households, IDPs and members of host communities. A nutrition assessment conducted by FSNAU and partners in central regions during November reported a prevalence of Global Acute Malnutrition (GAM) of 20.2 percent and a prevalence of Severe Acute Malnutrition (SAM) of 4.6 percent in the Addun livelihood zone and 19.1 percent GAM and 4.3 percent SAM in the Hawd livelihood zone. These results highlight the sustained humanitarian crisis in these regions. Without the ongoing relief assistance, a further deterioration in malnitrition in related mortality, especially among children would have occured.

Ongoing armed conflict and civil insecurity in different parts of the country has led to continuous civilian displacement. According to the latest update (Jan. 2010) from UNHCR, over 1.39 million people remain internally displaced due to insecurity. This ongoing conflict between insurgents and opposing groups has the potential to threaten current emergency interventions such as nutrition rehabilitation services, health care, water provision, and livelihoods support. In particular, insecurity and increasing restrictions by local militants in the south led to a temporary suspension of World Food Programme (WFP) food assistance in southern Somalia on January 5th. This temporary suspension affects Lower and Middle Juba, Lower and Middle Shabelle, Gedo, Bay, Bakol, and Hiran regions. Food assistance is used to provide direct assistance to vulnerable households, to generate employment and build infrastructure though food-for-work programs, and to support feeding centers for malnourished children. In **urban areas** throughout the country though some improvement

were noted, limited income options, high food prices, distruption of markets and trade activities continue to impact on poor households' food access. Though food prices decreased in most markets, prices are still higher than normal and are showing increasing trend in many areas.

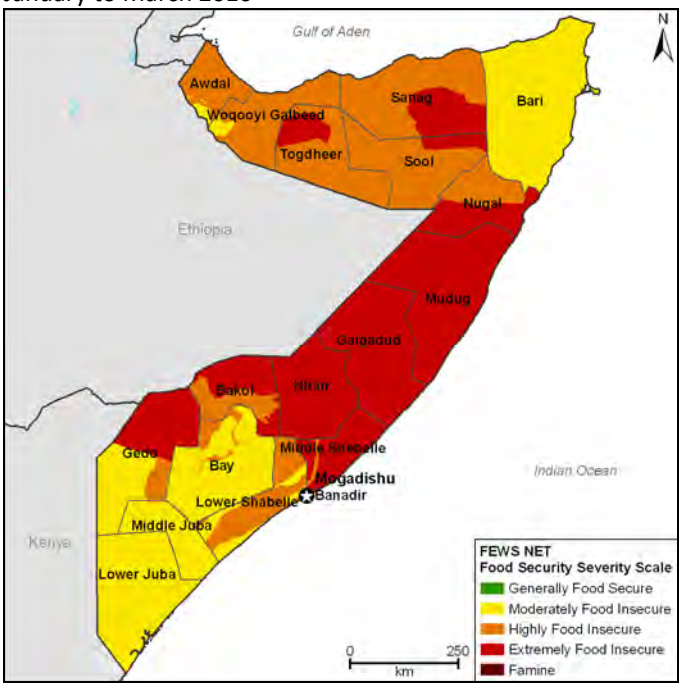
Most-likely food security scenario (January to June 2010)

The most likely food security scenario for the January to June 2010 period is based on a number of assumptions. These include:

- The temporary suspension of WFP food aid distributions in the south will persist.
- Given this suspension, it can be assumed that prices of sorghum and maize will increase further through June, when the next harvest is expected.
- Pasture and water will become scarcer in the drought affected and rain deficit pastoral regions of the north, northeast and central regions, leading to a continuation of abnormal migration to areas where better rainfall was received.
- Rangeland resources (water and pasture) in the northern regions of Sool and Nugal will be depleted earlier than normal due to atypical in-migration. Livestock body conditions, productivity and value will deteriorate, leading to a reduction in poor households' access to food and income.
- Increased armed conflict in central regions continues, affecting trade flows and humanitarian delivery and generating more civilian displacement.

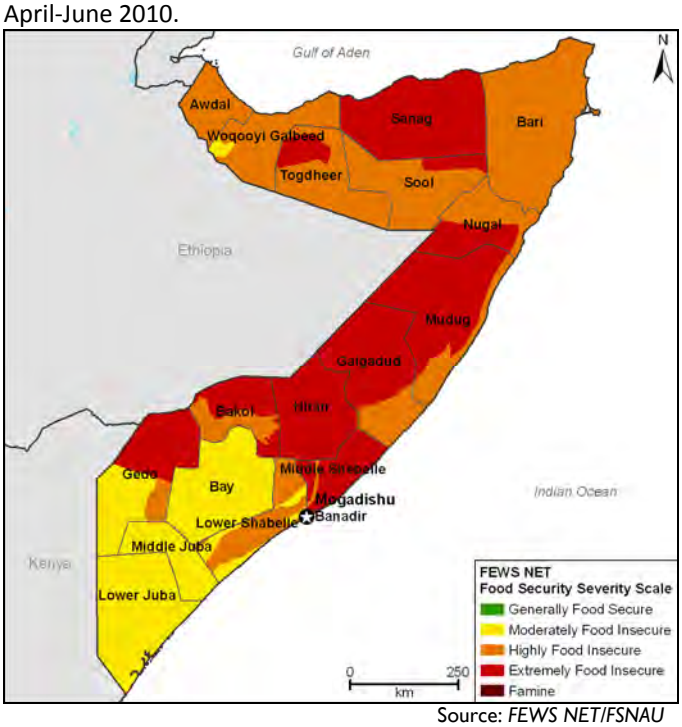
Given these assumptions, the food security situation in pastoral regions of **Galgadud, Mudug, Sanaag and Bari** regions is likely to deteriorate between January and March due to dwindling rangeland resources which negatively affect livestock productivity and value. In the **Sool Plateau pastoral livelihood zone** in **Sanaag** region, serious livestock asset depletion is being reported due to increased household expenditure on water and migration. The prevailing high water prices, increased expenditure on migration, and high debt levels are not expected to change till April when the next rainy season is expected. Moreover, if the main season *gu* rains, which are expected in early April, are delayed or perform poorly, more areas of Sanaag region will become extremely food insecure (Figure 2). Even if *gu* rains perform well, household expenditure on water and migration will decline, but livestock production (milk and ghee) and reproduction is not expected to

Figure 2. Most likely food security scenario, rural areas, January to March 2010



Source: *FEWS NET/FSNAU*

Figure 3. Most-likely food security scenario, rural areas, April-June 2010.



Source: *FEWS NET/FSNAU*

improve given the fact that most of the livestock did not concieve due to the drought. Therefore the prevailing emergencies will persist in Sool plateau pastoral livelihood zone through June.
In Galgadud and Mudug, especially in the **Hawd** and **Addun** pastoral livelihood zones, food security conditions are expected to deteriorate further until the *gu* rains begin in April. These rains will stabilize the situation but are unlikely to lead to substantial improvements in food security as many households have lost all of their animals, and those animals which remain did have not conceived and therefore are not expected to produce milk. Food access is also expected to be constrained by abnormally high cereal prices and low livestock prices during this period. However, the ongoing humanitarian assistance which includes relief food distribution and supplementary feeding for malnourished children is expected to continue in this area through June preventing large scale child mortality and adult malnutrition.

Extreme food insecurity is also expected to persist in parts of **Bakool, Middle Shabelle, North Gedo and Hiran** in the south (Figure 3). The population of these regions has experienced several years of poor rains, recurrent conflict, and loss of livestock assets. In addition, the temporary suspension of humanitarian assistance due to the pull out of most of the aid agencies from these regions will further hinder humanitarian delivery and reduce food and income access of poor hoseholds. If the temporary suspension of the food assistance persists, it is likely that food security in the south especially for poor households who rely (directly or indirectly) on relief food will worsen during the April to June wet season, when businesses and trade movement, and the associated income earning activities, are low and price of locally produced cereal normally are high.

In the most likely scenario between January-March, unseasonable increase in staple food prices and a decline in food-aid-related employment could drive the deterioration in food security situation in parts of the south where extreme level of food insecurity conditions still persist (Figure 2). However, this will be offset by the good *deyr* harvest in February (which is forecast to be average), significant improvements in southern pastoral and agropastoral conditions, and the presence of existing household cereal stocks. However, if food assistance are cut-off for a longer period of time (i.e., 4-6 months), increased rates of child malnutrition, increased adult malnutrition especially women from poor households and increased population movement towards Kenya (7,000 people/month) are expected. Without the much needed livelihood support, the food security of sizeable numbers of people who are extremely food insecure in these regions may further deteriorate. Repeated seasons with normal to above normal rainfall will be needed to attain full livelihood recovery.

On the other hand, food and livelihood security of the pastoral, agropastoral and riverine communities **in south Gedo, Middle and Lower Juba, Bay and parts of Lower Shabele region** is expected to improve further. *Deyr* harvest (both cereal and cash crop) in these regions is above average while livestock condition, productivity and value showed significant improvement.

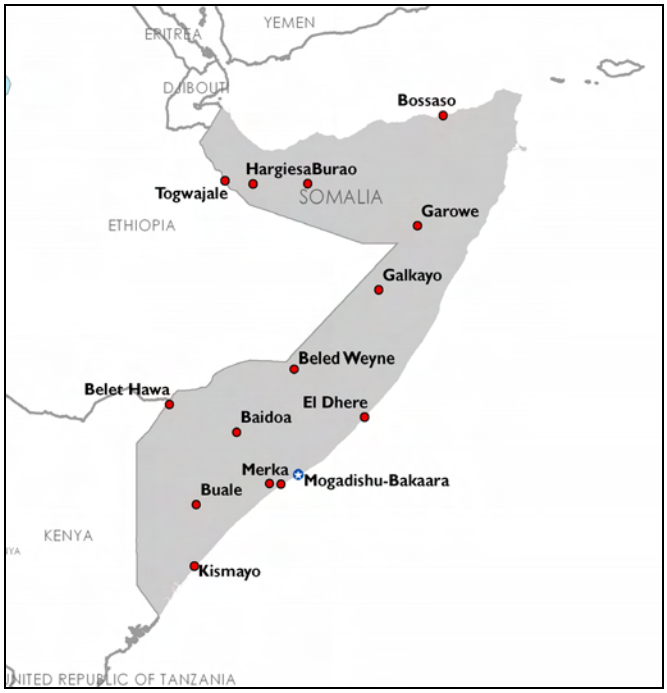
In the most likely scenario between April and June, the existing conflict especially in Hiran, Mudug and Galgadud regions, which are the importants link between the South and North of the country, will further constrain cereal trade. Thus, major price shocks, especially for maize and sorghum, are anticipated in the **north** and **northeast**. These price shocks will compound the impacts of a growing drought in these regions**.** Poor livestock body conditions have led to a reduction in livestock prices and have limited the ability of northern pastoralist to sell animals, despite increased demand following the removal of a Saudi ban on Somali livestock export. This reduction in purchasing power also constrains the ability of the local population to shift back towards cereal imports. In Hiran, though assistance will be interrupted, substantial cowpea harvests in nearby areas, increased labor opportunities, and the likely flow of traded relief food from Galgadud, are expected to prevent any significant deterioration. However, if recent outbreaks of violence continue, an increase in food insecurity is possible in this region.

With the prevailing high cost of living in urban centres, in the most likely scenario between April to June, food security among poor urban households who are highly food insecure is not expected to improve. Livelihood support, especially in urban areas where a significant number of people are extremely food insecure, like Middle Shabelle, Hiran, and North Gedo, remains critical.

Table 1: Events which could affect the food security outlook

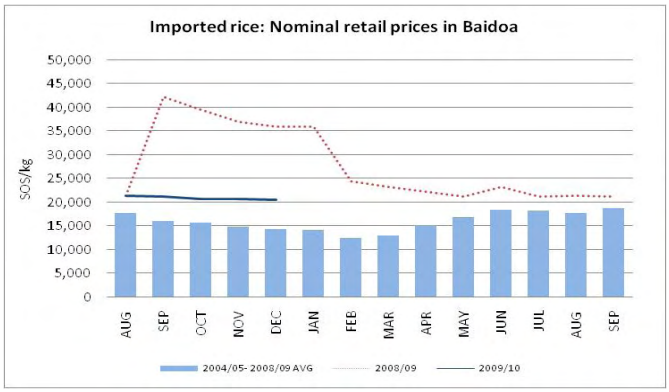
Geographic Focus Area	Possible events in the next 6 months that would change the most likely scenario in this area	Impacts on food security conditions	Likelihood of occurrence*	Key variables to monitor
Hawd and Addun pastoral livelihood zones of Galgadud and Mudug	Increased conflict interrupts humanitarian aid delivery	Major increase in child and adult malnutrition, spike in mortality, localized famine conditions	Unlikely	Conflict incidence, aid delivery
Central and Hiran regions	Cessation of armed conflict, return of IDPs to Mogadishu, and other urban centers.	Cessation of hostility and resumption of productive economic activities in main towns improves access to income opportunities, which will improve poor households' ability to purchase food and non food essential commodities.	Very unlikely	Number of newly displaced people, refugees crossing into Kenya, IDPs returning to their home towns, market activities, labor wages and terms of trade in urban areas.
North and Northeast	Above normal *gu* rains	Above normal gu rains lead to improved rangeland condition, and recovery of livestock herd size in Sool Plateau, Hawd and Addun pastoral livelihood zones.	Very unlikely	Start of the season, cumulative precipitation and its distribution, rangeland condition, water prices, livestock herd dynamics.

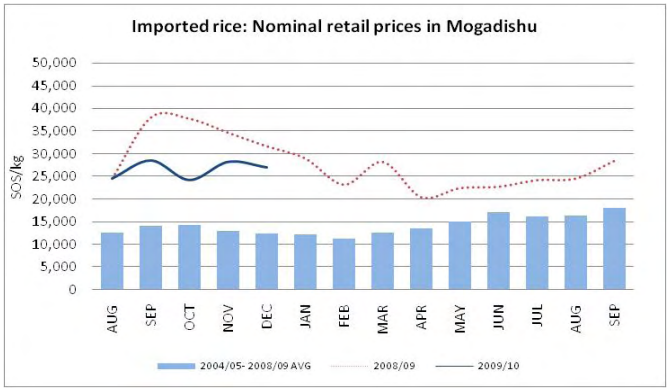
* Probability levels	Description
Unlikely	Could occur in the time period if conditions changed moderately
Very unlikely	Could occur in the time period if conditions changed significantly

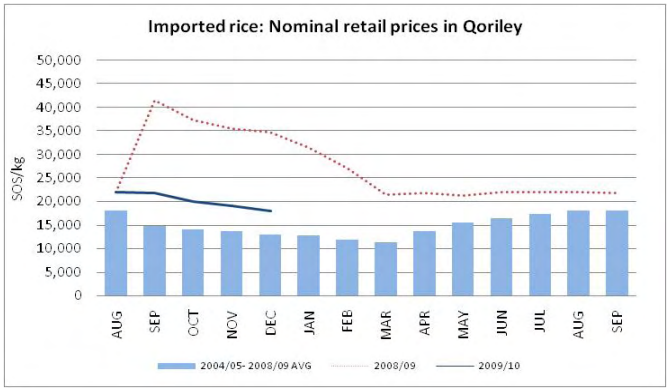


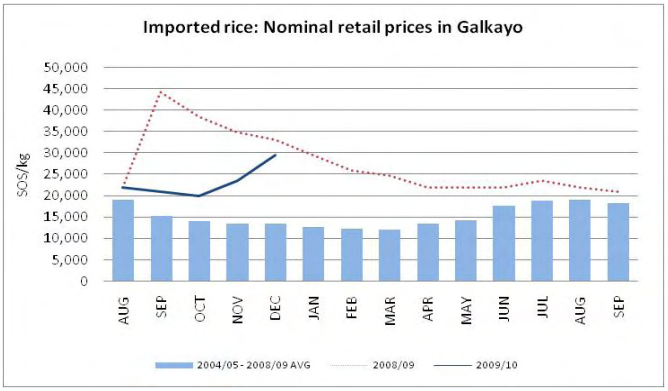
Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

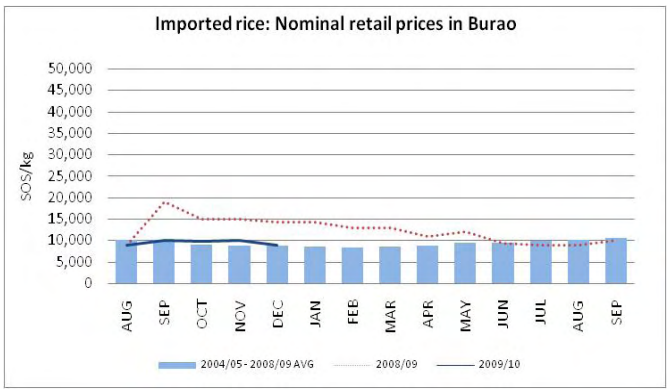
Maize, sorghum, rice, and cowpea are the most important staple foods for Somalis. Maize and sorghum are the preferred staple in agriculture areas, while rice is more popular in pastoral and urban areas. Cowpea is an integral component of all households' diets. Mogadishu is Somalia's largest market with links to most markets in the country. Baidoa is a significant sorghum producing and consuming area. Qorioley is a large maize production area. Burao and Galkayo/Dhusamareb are exclusively pastoral where people depend on domestically produced sorghum and imported rice purchases. Togwajale is a sorghum producing area with links to Ethiopian markets; most cereal flows from Ethiopia pass through this market. Hargeisa is the capital of Somaliland and an important reference market for livestock trade with Ethiopia. Buale, located in an important maize production area in the southern region supplies most nearby markets. Eldhere and Merka are areas of cowpea production: the principal source of income. Bosasso and Kismau are both port towns and entry points of imports. Beletwene connects the south and central regions of the country, and also has linkages with Ethiopia. Bula Hawa is an important cross-border market with Kenya.










Imported rice: Nominal retail prices in Burao
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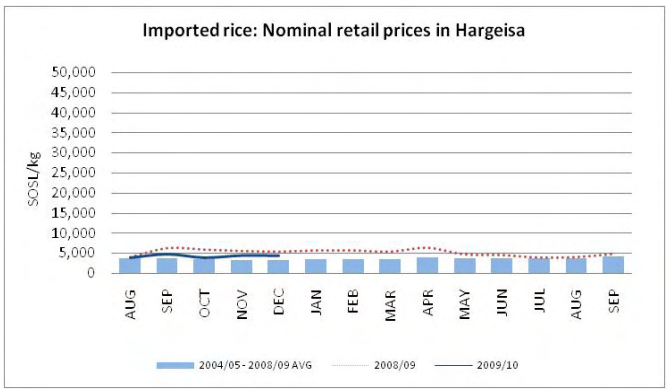
Imported rice: Nominal retail prices in Hargeisa
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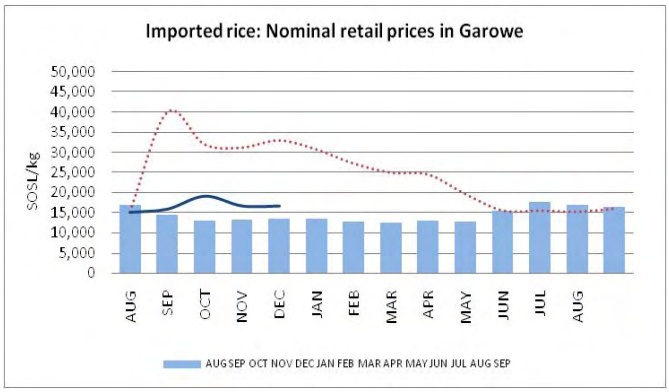
Imported rice: Nominal retail prices in Garowe
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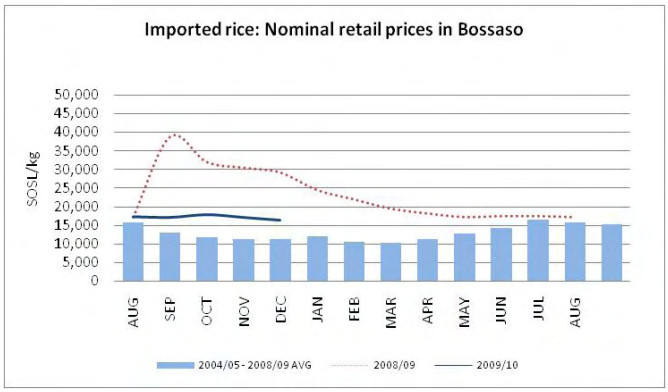
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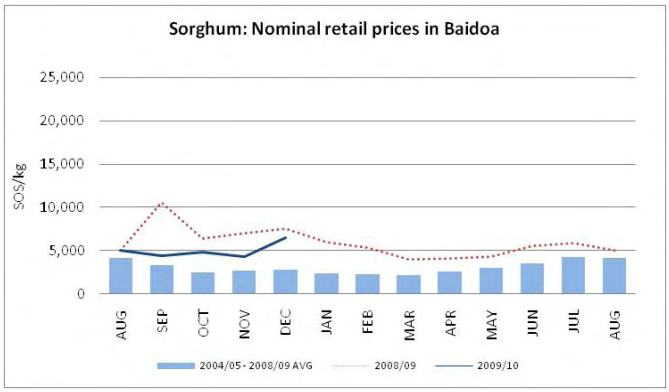
Sorghum: Nominal retail prices in Baidoa
SOS/kg
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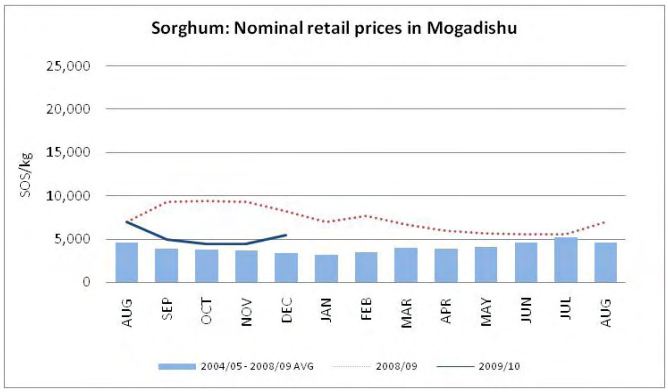
Sorghum: Nominal retail prices in Mogadishu
SOS/kg
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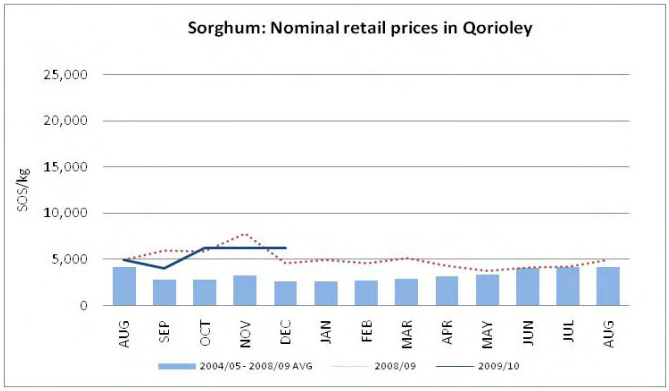
Sorghum: Nominal retail prices in Qorioley
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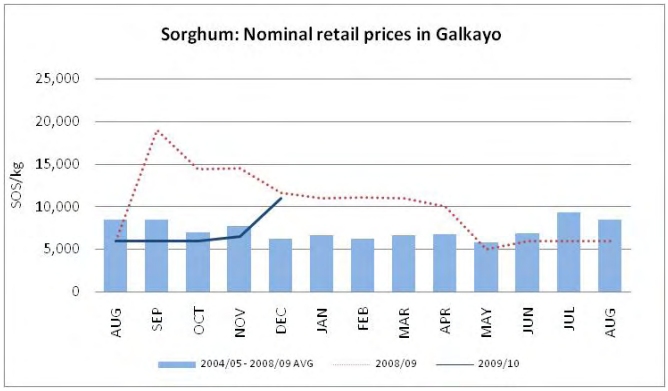
Sorghum: Nominal retail prices in Galkayo
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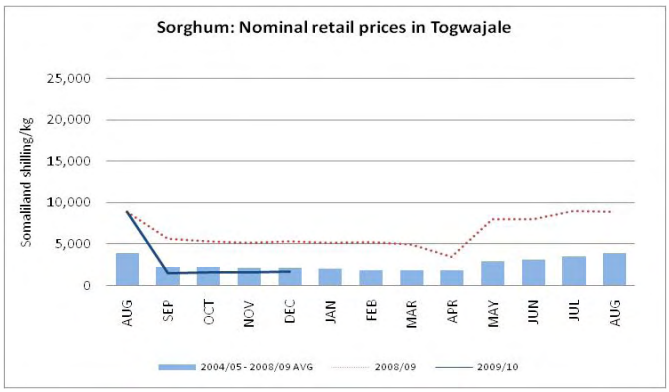
Sorghum: Nominal retail prices in Togwajale
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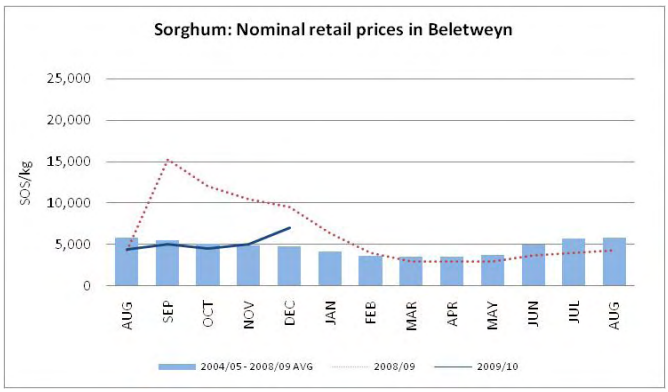
Sorghum: Nominal retail prices in Beletweyn
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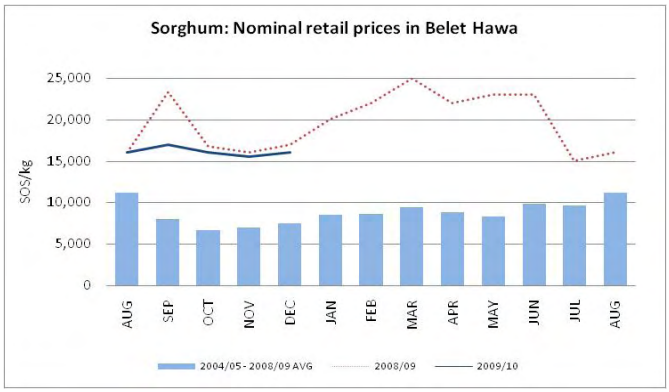
Sorghum: Nominal retail prices in Belet Hawa
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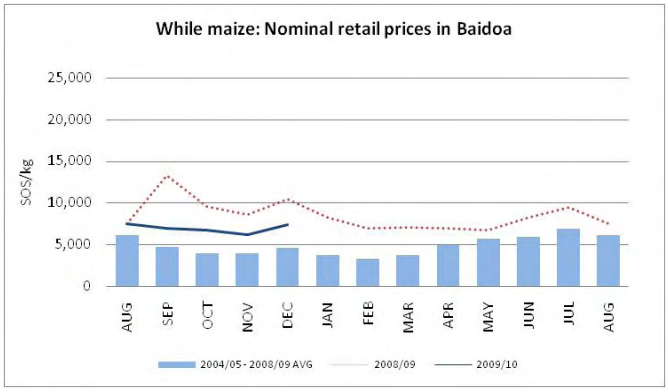
While maize: Nominal retail prices in Baidoa
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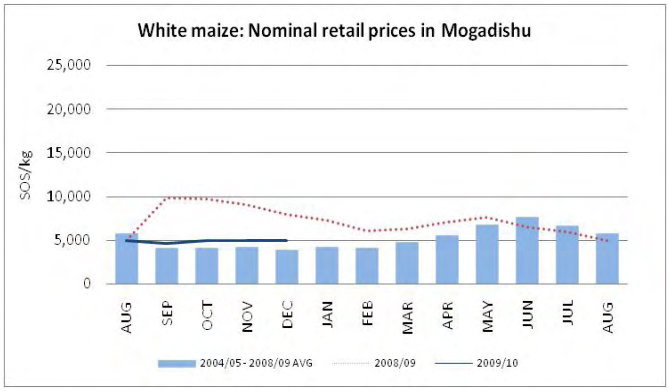
White maize: Nominal retail prices in Mogadishu
SOS/kg
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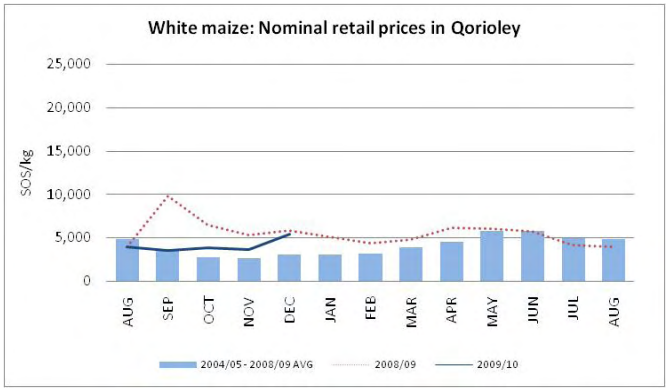
White maize: Nominal retail prices in Qorioley
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2008/09
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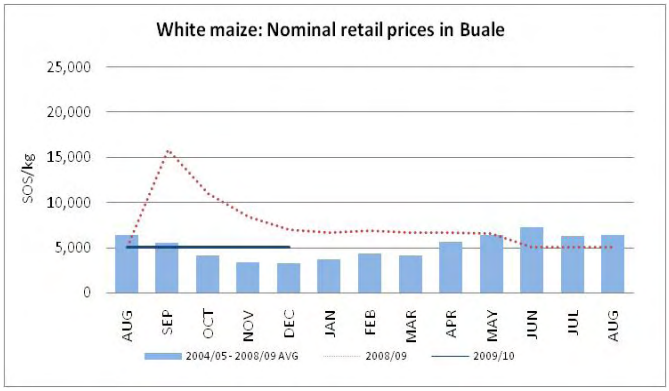
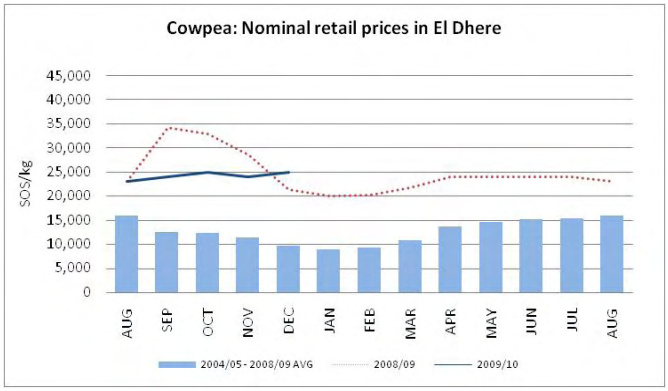
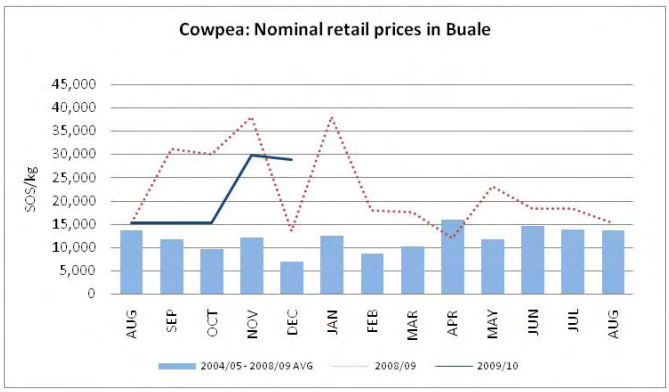
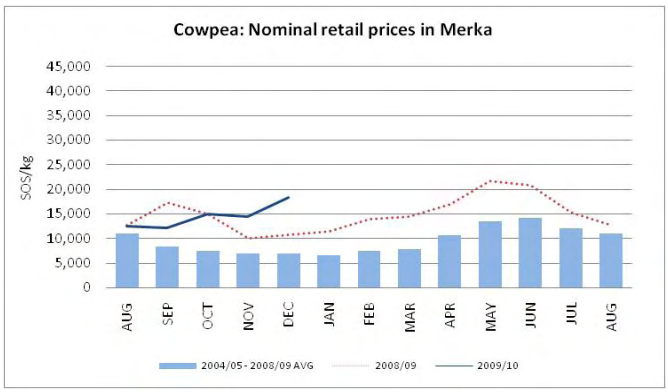
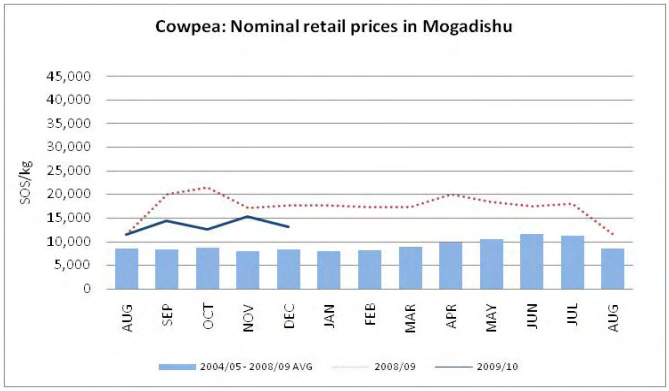
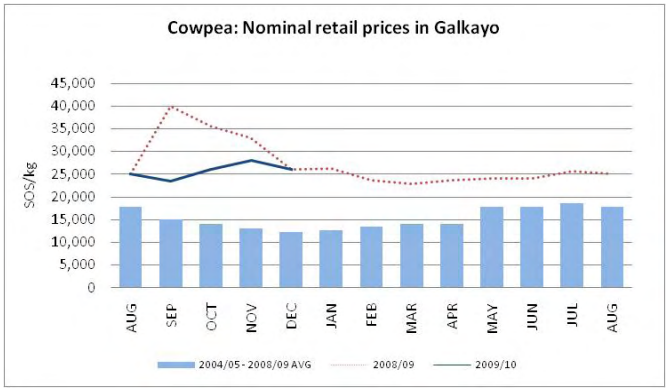

White maize: Nominal retail prices in Buale
SOS/kg
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10

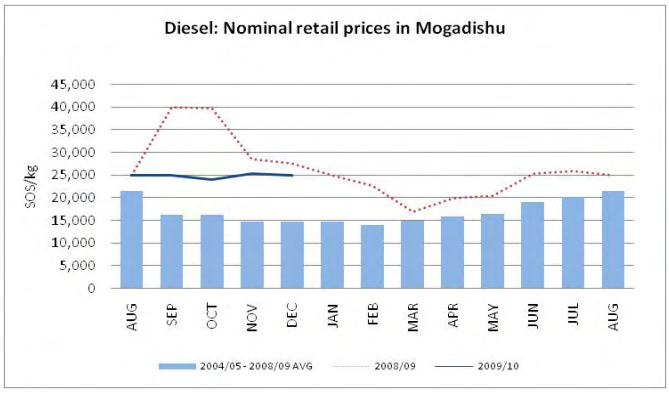

Cowpea: Nominal retail prices in El Dhere
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10

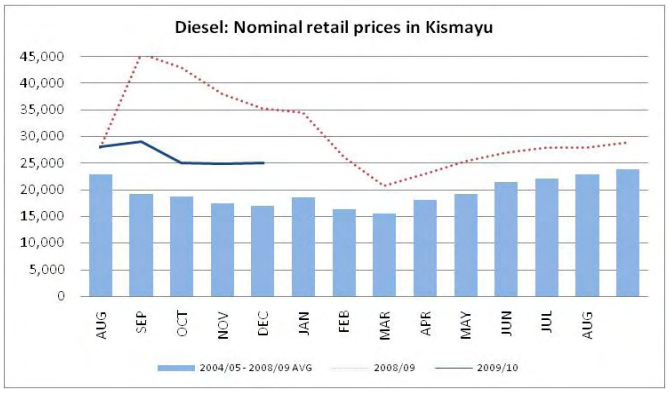

Cowpea: Nominal retail prices in Buale
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10


Cowpea: Nominal retail prices in Merka
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10


Cowpea: Nominal retail prices in Mogadishu
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10


Cowpea: Nominal retail prices in Galkayo
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10


Diesel: Nominal retail prices in Mogadishu
SOS/kg
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10


Diesel: Nominal retail prices in Kismayu
45,000
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
0
AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG
2004/05 - 2008/09 AVG
2008/09
2009/10