

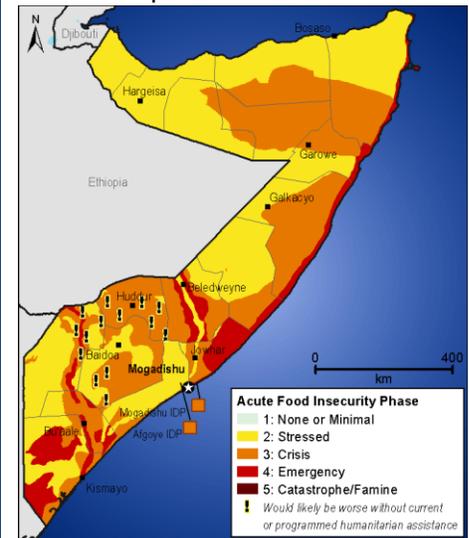
SOMALIA Food Security Outlook

April to September 2012

Key Messages

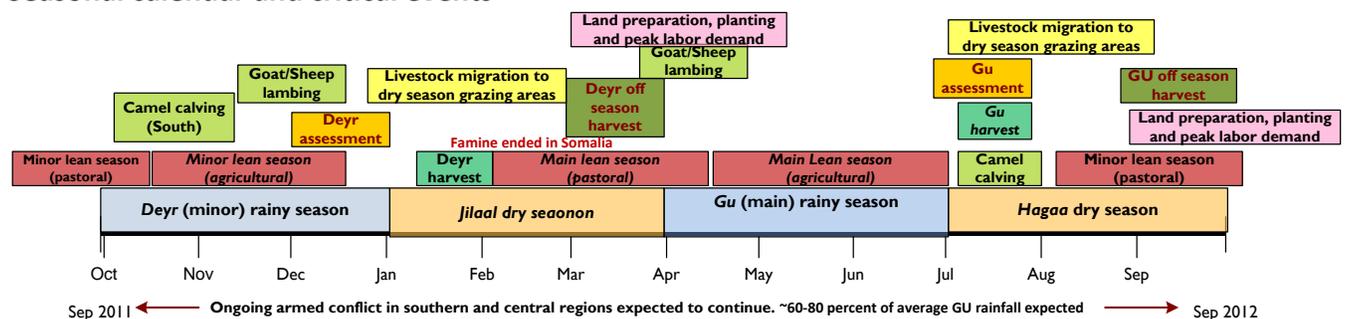
- In the most likely scenario, rains in Somalia are expected to be ~60 to 85 percent of average with erratic distribution in both time and space. In the worst case scenario, forecasts suggest there is a 30 percent chance that rains will be ~60 percent of average or below. *Gu* rainfall will have a significant impact on food security for poor, agropastoral households dependent on rainfed crop production.
- Southern/Central agropastoral** and **inland rainfed cropping** areas of Somalia, including areas still recovering from the 2011 Famine (IPC Phase 5), will experience a deterioration in food security outcomes due to anticipated poor *Gu* crop production in July and the limited number of saleable livestock over the course of the scenario period.
- Due to increasing debt levels, reduced fishing labor opportunities, a limited number of saleable livestock, overstretched social support networks, relatively poor milk availability, **Serious or Critical** malnutrition rates, and livestock holdings that are significantly below baseline levels, food security outcomes for poor, pastoral households in the **Nugal Valley, Sool Plateau, and Costal Deeh livelihoods** of the **northeastern and central regions** are deteriorating. Poor households are only meeting their basic food needs through loans and gifts to prevent the complete liquidation of remaining assets which could lead to becoming pastoral dropouts.

Figure 1. Current food security outcomes, April 2012



Source: FSNAU/FEWS NET Somalia

Seasonal calendar and critical events



Source: FEWS NET Somalia

Most-likely food security scenario April to September 2012

National overview

The October to January *Deyr* 2011/12 rains were average to above average across Somalia. These rains supported a *Deyr* harvest in December and January in southern Somalia which was, overall, above average both for maize and sorghum production. The *Deyr* also led to significant improvements in rangeland conditions in most parts of the country. However, the *Jilaal* dry season from January to March significantly reduced pasture and water availability in key pastoral zones. However, dry pasture is still available, and pasture availability remains near average. Water resources have seasonally diminishing, and as of early April, water trucking was ongoing in most of the central and northern pastoral areas. Rangeland

conditions in Coastal *Deeh*, Sool Plateau, and Nugal Valley livelihood zones of the Northeast declined. Abnormal livestock migration occurred earlier in the January to March *Jilaal* season and continued later into the season than usual. Some pastoralists took their livestock to localities that are neither their dry season grazing areas nor their wet season grazing areas in search of pastoral resources.

In the Northwest, pasture and water availability deteriorated in some parts of the Hawd of Burao, in the Golis and Guban Pastoral livelihood zones, the eastern parts of the Hawd of Hargeisa, and in the Odweyne district of Togdheer region. Odweyne district received below average rainfall during the October to December *Deyr* 2012. In the central regions, an acute water shortage has resulted in widespread water trucking since mid-February, particularly parts of the Hawd and Addun Pastoral livelihood zones. However, pasture availability remains moderate but is likely to deteriorate. In Southern Somalia, pasture and browse conditions deteriorated during the January to March *Jilaal* season leading to below average pasture and browse availability in Middle Shabelle. However, in Lower Shabelle, rangeland conditions remained normal due to the good impact of the *Deyr* 2012 rains. Rangeland conditions remain near average in key pastoral areas in the south, especially Southern Inland Pastoral (SIP) livelihood zone in Hiran, Bakool, Gedo, and Middle and Lower Juba regions.

Off-season crop harvest

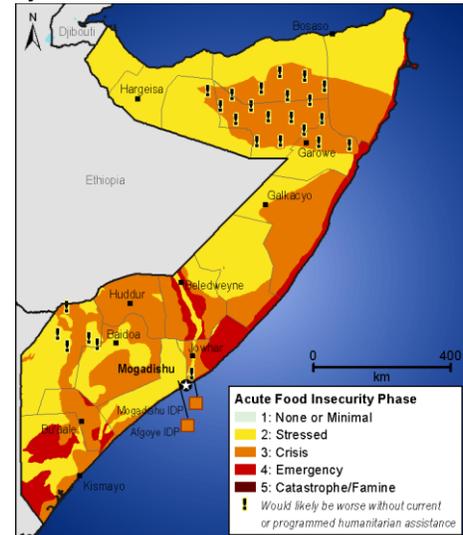
In the riverine areas of Middle and Lower Juba, the *Deyr* harvest in January was almost non-existent. To make up for this production shortfall, households from all wealth groups increased their planted area for off-season production using river water. This was harvested in March and April. This harvest will provide a temporary increase in household food availability, but the scale of this harvest is not sufficient to make up for the poor *Deyr* harvest. The actual off-season maize harvest in southern Somalia was much higher than originally anticipated in January. The increase of the harvest over the original projection is due to a significant increase of the planted land in the riverine areas of Jilib and Jamame of Middle and Lower Juba, respectively.

Apart from the off-season maize crop harvest, off-season sesame and cowpea cash crops were harvested in Middle Juba, Lower Juba, Lower Shabelle, and Bay regions. These harvests were affected by some pest damage. As *Gu* 2012 approaches, farmers in southern Somalia, Hiran, the cowpea belt, and the Northwest started agricultural land preparation in mid-March. Activities included canal rehabilitation and some dry planting in Bay, Shabelle, and Hiran regions. These agricultural activities resulted in a seasonal increase in available labor opportunities for poor households.

Local staple cereal prices have continued to decline since October 2011 in all cereal-producing and deficit markets. Cereal price declines had been influenced by the combination of the above average *Deyr* 2011/12 harvest, the substantial cereal imports for humanitarian assistance, the monetization program in Banadir region, and commercial imports which have increased the overall cereal supply. Prices of local cereals are still decreasing as of early April except in Bay region. However, it is expected that local cereal prices will increase from April until the arrival of the next harvest in July. Livestock prices have increased in the central and Northwest regions but are decreasing in the Northeast.

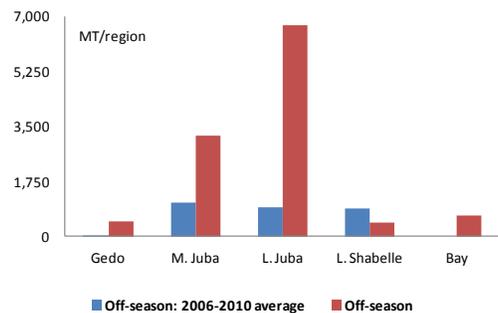
Based on the FSNAU *Deyr* 2011/12 seasonal assessment conducted in December, the overall nutrition situation in the country has improved since July and August. However, acute malnutrition and mortality rates in the South of Somalia still

Figure 2. Projected food security outcomes, April-June 2012



Source: FSNAU FEWS NET Somalia

Figure 3. 2012 *Deyr* off-season harvest in March and April in southern Somalia compared to five-year average of available off-season harvests



Source: FSNAU

Note: Not all regions have off-season data nor is an off-season always produced. Only harvests that occurred and were estimated from 2006 to 2010 were averaged.

remain above emergency thresholds and are classified as likely *Very Critical*. The prevalence of global acute malnutrition (GAM) in the south ranges between 20 and 30 percent with the exceptions of Bay region and the Juba Riverine livelihood zone, where the GAM prevalence is likely still above 30 percent. Severe acute malnutrition rates have also improved from above 10 percent in all regions in the south to below 10 percent. Crude death rates are under two deaths per 10,000 people per day across the country, apart from among internally displaced persons (IDPs) in Mogadishu who are at a rate of 2.06 (CI 1.60-2.66) and IDPs in Kismayo who are at a rate of 2.30 (CI 1.60-3.0). These rates still indicate an improvement since the middle of 2011. The improvements in levels of malnutrition and mortality are attributed not only to improvements in household food access, milk availability, and income, but also to humanitarian support in the form of food and non-food assistance along with the control and management of disease outbreaks. In relation to humanitarian assistance, based on the cluster reporting at the end of February, the agriculture and livelihoods cluster reached 11 and 46 percent of their respective targets for food voucher and cash interventions, respectively. Food assistance reached 36 percent of targeted beneficiaries from January to March.

According to the United Nations High Commissioner for Refugees (UNHCR), between January 1st and March 9th, 2012, approximately 101,000 displacements were recorded in southern and central Somalia. Civil insecurity is reported as the major cause. Among the newly displaced, 20,000 people are from Bay and Hiran while around 25,000 are from Gedo and Lower Juba. IDPs in Mogadishu in camps near the presidential palaces are of particular concern, since conflict and suicide bombings are targeting these areas. Based on the health and water, sanitation, and hygiene (WASH) clusters' epidemiological surveillance findings, 154 cases of acute, watery diarrhea (AWD) (75 percent children) were reported in Lower Juba while 126 cases (58 percent children) were reported in Middle Juba. Similarly, 302 and 257 cases of malaria were reported in Lower and Middle Juba respectively during the first week of March. 79, 84, and 187 cases of suspected cholera have been reported in Gedo, Middle Juba, and Lower Juba, respectively.

Outside of the South, a slight deterioration in the nutrition situation has been noted in the Hawd of the central regions where the nutrition situation was moved to *Critical* from *Serious*. In the Hawd of the Northwest, the nutrition situation moved from *Serious* to *Alert* phase since August 2011. The deterioration in the Northwest is likely due to both the localized cholera outbreaks and the outmigration of livestock to Ethiopia which has seasonally limited access to milk. The situation has likely improved starting in February, when the animals began to return. The nutrition situation of IDPs remains of concern across the country with most settlements reporting *Serious* to *Very Critical* levels of acute malnutrition.

Improvements in Somalia during the *Deyr* 2011/12 harvest and due to humanitarian interventions slightly reversed in March and April due to the impact of the *Jilaal* dry season and a substantial reduction in the level of humanitarian access. Household stocks are depleting except in the Juba riverine area which received a significant off-season harvest in March/April 2012. Labor opportunities improved from mid-March and are expected to peak in mid-May. The pressure on household purchasing capacity is expected to slightly ease. Nevertheless, labor demand will drop in June.

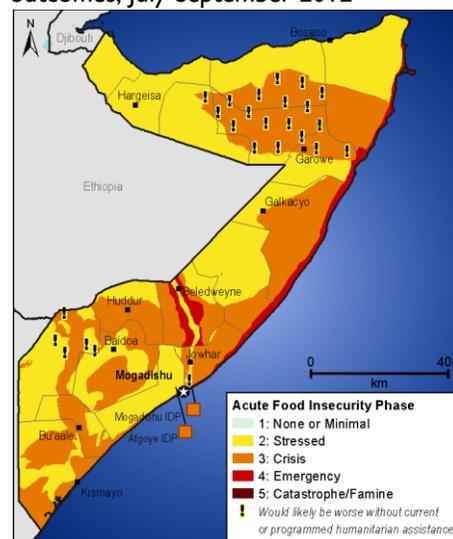
Looking ahead through September, civil insecurity and conflict are expected to remain significant drivers of food insecurity. The food security outcomes of the 1.7 million people currently in Crisis (IPC Phase 3) could further decline over the coming months due to reduced access to humanitarian assistance. On-going military operations in southern Somalia are also anticipated to interrupt both agricultural and livestock production activities along with markets and trade. Conflict and insecurity will impede the recovery process. More specifically, trade movements, access to markets, and the availability of labor opportunities during the April to June lean season in Gedo, Lower and Middle Juba, Bay, Bakool, Hiran, eastern parts of the central regions, and Lower and Middle Shabelle could significantly decline in areas where insecurity disrupts trade and livelihoods. Across the South, the May to June lean season in agropastoral areas that are emerging from Famine and Emergency (IPC Phase 5 and 4) levels of food insecurity are likely to experience deteriorating food access unless humanitarian assistance continues and livelihoods are strengthened. Areas that are still in Emergency (IPC Phase 4) or have a lack of access to humanitarian assistance are of particular concern. The situation will be at its worst between July and September in crop-dependent, agropastoral livelihood zones as the July to August crop harvest is likely significantly below average due to erratic and below-average rainfall.

Over the coming months, the April to June *Gu* rainfall and the level of humanitarian access will be crucial for preventing deterioration. In the most-likely scenario, FEWS NET assumes that rainfall totals across in Somalia will be ~60 to ~85 percent of average. There is a 50 percent chance that rainfall will fall within this range.

Other important assumptions for the most-likely scenario through September for southern, central, and northern Somalia include:

- Sorghum and Maize:** Availability of locally produced cereals will decrease from April to June. However, cereal stock availability will increase slightly in the April to May period in riverine areas of the Juba valley. Prices will increase along normal seasonal patterns during the April to June period, but they will not reach the peaks from May to July of 2011. Prices will decline following the July to August *Gu* harvests with the size of the price decline reflecting the performance of the *Gu* season.
- Cowpea:** Cowpea seedling preparation is ongoing in the cowpea belt. Around ~75 percent of the cowpea farmland has been prepared and is ready to be planted. Even with low expected total rainfall amount, cowpea production should be near average, and the increase in cowpea supply will likely result in price declines before June 2012 as the harvest starts to move onto markets.
- Rice:** Prices are expected to moderately increase over the course of the scenario period. They will follow the seasonal trend of increasing prices slightly during the monsoon winds from June to September when new importation is more limited. However, recent Somali shilling (SOS) value appreciation since June 2011 has largely stabilized the rice price, so prices will overall be relatively stable, especially as compared to local coarse grains.
- Livestock:** Livestock prices are currently declining in most regions and are expected to follow the seasonal trend. They will decline until export demand for Ramadan and the *Hajj* starts to pick up in July after which they will increase.
- Conflict:** Insecurity will intensify during this outlook period due to escalating military interventions and clashes between the various armed groups including the transitional federal government (TFG), the African Union Mission in Somalia (AMISOM), the Ethiopian military, the Kenyan military, and local armed groups. Conflict is highly likely and likely to be pervasive in Middle and Lower Juba, Gedo, and Hiran. Conflict and suicide bombings in Mogadishu are expected to continue and will hinder trade and population movement along the tarmac roads between Mogadishu, Kismayo, Bay, Bakool, and Lower Shabelle.
- Assistance:** Due to uncertainty regarding civil insecurity, humanitarian funding, and implementing organization's plans, no major new assistance flows were assumed. However, in the most stable and accessible areas of central Somalia and the North such as Galgadud and Mudug regions, the Sool Plateau, and the Nugal valley, ongoing humanitarian assistance is expected to continue. In the South, in the areas of Gedo, Bakool, Hiran, and Bay recently brought under the control of AMISOM and TFG's armed personnel, humanitarian assistance is assumed to continue. However, in areas of Bay where these forces only control major towns and not rural areas, civil insecurity is assumed to interfere with humanitarian access.
- Displacement:** Based on the protection cluster's March 30th weekly report on conflict in central and southern Somalia, both forced and voluntary displacements may increase over the course of the scenario period. However, due to the rainy season which may limit the movement of armored vehicles, displacement is likely to be low during the April to June period. From July to September, displacement and the total number of IDPs will rise.
- Disease outbreaks:** Water-borne diseases, AWD, cholera, and malaria are expected to follow their usual seasonal pattern and are expected to rise during the rainy season from April to June in southern Somalia. Outbreaks will peak between April and June, but they are expected to decline between July and September.

Figure 4. Projected food security outcomes, July-September 2012



Source: FSNAU/ FEWS NET

Based on these assumptions, and considering the impacts of the *Jilaal* dry spell, in the most likely scenario, food and income sources for poor households in southern Somalia are likely to deteriorate in some areas, particularly in the

southern, agropastoral, rainfed areas of Hiran, Bakool, Gedo, Middle and Lower Juba, and some parts of Bay. While the trend is seasonally normal and this is the typical lean season for southern agricultural areas, the severity of outcomes is likely to be worse than usual due to the persistent impact of the 2011 Famine (IPC Phase 5) and the continuing limits on humanitarian assistance. Nonetheless, a return to Famine (IPC Phase 5) is not anticipated. From July to September, the food security situation is expected to slightly improve due to the expected, but below average *Gu* harvest and expected, simultaneous, slight increases in livestock prices.

A closer look at areas of concern

Agropastoral livelihood zones in Lower and Middle Juba, Gedo, Bakool, and Hiran

Despite good rains during the October to December *Deyr*, crop production remained below the post-war average (PWA) in agropastoral areas of Hiran. Poor agropastoral households in Hiran have no stocks of cereals and are funding market purchases of grain by selling off their remaining livestock. Sorghum production in Gedo, Middle Juba, and Bakool agropastoral livelihood zones was above average.

Cereal prices, in all southern agropastoral zones in Middle and Lower Juba, Gedo, Bakool, and Hiran, significantly declined in March compared to last year and six months before. Red sorghum prices in Gedo and Bakool decline by 68 and 70 percent respectively, white sorghum prices in Hiran declined by 58 percent, while white maize prices dropped by 35 and 40 percent in Lower Juba and Middle Juba, respectively. Cereal prices in Hiran, Bakool, and Gedo are lower than five-year average by 12, 32, and 44 percent respectively. However, prices are still higher than their averages in Middle and Lower Juba by 13 and 12 percent, respectively. Rice prices declined in all regions since October except Lower Juba where prices started declining in February. The highest declines were in Bakool (21 percent), and the lowest were in Middle Juba (11 percent). However, rice prices are still up to 29 percent higher than five-year average in all regions. Water prices in Gedo increased by 9 percent in March while in Bakool, Hiran, and Lower and Middle Juba, water prices declined by between 21, 25, and 40 percent compared to the same month last year. However, water prices remain higher than the five-year average with some exceptions in Lower and Middle Juba.

In March, local quality goat prices in all regions had increased between 5 and 62 percent since October 2011. In southern Somalia, the highest price increase were in Gedo, and the lowest were in Lower Juba. Similarly, significant local quality goat price increases were observed in annual comparisons. Prices in all the southern regions are above the five-year average. Cattle prices in Lower Juba increased in March 2012 by 20, 82 and 56 percent compared to October 2011, March 2011, and the five-year average, respectively. In March 2012, the terms of trade (ToT) between local quality goat and red sorghum in Gedo region increased by 247 percent compared to October 2011 and by 704 percent and 84 percent compared to March 2011 and the five-year average, respectively. Extreme increases in local quality goat to red sorghum ToT were observed in Bakool. In Middle and Lower Juba, the local quality goat to white maize ToT increased, but this increase was not as substantial as that in other southern regions. Also, the local quality goat to white maize ToT in Middle Juba remains 29 percent below the five-year average. In Hiran, local quality goat to white sorghum ToT also showed significant improvement.

Figure 5. Changes in southern agropastoral terms of trade, regional averages, in kilograms (kg) of red sorghum or white maize purchased by the sale of one local quality goat

Region	Mar-11	Mar-12	Percent Increase
Bakool	28	300	971
Gedo	25	201	704
Hiran	35	151	331
L. Juba	28	101	261
M. Juba	37	82	122

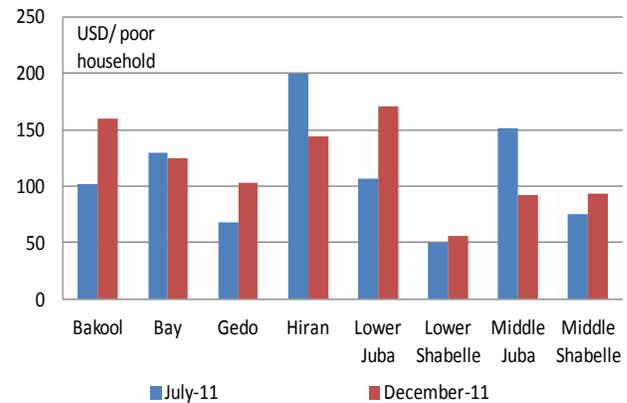
Source: FSNAU/FEWS NET

In Gedo, Bakool, and Middle and Lower Juba, daily labor wage rates significantly increased compare to last year and the five-year average. In Hiran, the wage rate in March 2012 is the same as March 2011, just above the five-year average. The significant increase across much of southern Somalia is attributable to increased agricultural labor demand and a reduced labor pool as many people moved to IDP camps and to refugee camps in both Ethiopia and Kenya due to insecurity and drought. Despite wage rate improvement, the income from daily labor wages alone for the poor households in these areas still is not estimated to be enough to fully cover both the cost of the minimum expenditure basket (MEB) and debt repayment. However, Gedo and Lower Juba can maintain their minimum food basket, while Bakool and Middle Juba cannot even cover their minimum food basket using an estimate of ten days of labor by two household members per month.

The debt level of poor households is considerably high, across the southern, agropastoral regions. Poor households are indebted between ~USD 100 and ~USD 200. The debt overhang significantly reduces poor households' purchasing power and their ability to take on additional debts to finance market purchases of food.

Intensified conflict in Gedo, Lower and Middle Juba, Hiran, Bay, and Bakool caused a significant number of new displacements. Civil insecurity also limits inflows and outflows of commodities to and from Gedo's and Middle and Lower Juba's agropastoral areas. Areas which are not close to the borders currently have more limited trader movement than usual due to the risks traders face from both armed groups and military personnel. Some districts are more affected including Garbaharey, Bardere, and Lugh in Gedo, Sakow, Afmadow, and Buale in Middle and Lower Juba, and Beletweine in Hiran.

Figure 6. Poor household debt levels



Source: FSNAU

In a normal year, poor households in Southern agropastoral and Lower Juba agropastoral areas meet their food needs through a combination of their own production of crops or livestock and from market purchases. Consumption of livestock products such as milk and meat increases during the April to June *Gu* rains, and the making and sale of ghee becomes an important source of income. Green consumption of sorghum starts in late June. Cereal prices increase during this time of the year in most agropastoral areas, so poor households rely more heavily on their own livestock product production. They attempt to wait to sell their livestock as prices improve after the *Gu* harvest in July with the start of Ramadan.

Based on the national assumptions and recent conditions in agropastoral areas, below average and erratic distribution of rains would likely reduce both area planted and production. This would increase local cereal prices leading up to and following the usual harvest period in July and lead to reduced labor income. Unfavorable terms of trade would likely lead to poor households having difficulty meeting food needs and result in a poorer diet with a highly limited variety of foods. Conflicts will reduce trade and increase the risks of population movements. The more limited trade during a period of conflict will both increase essential commodity prices and reduce ToT by limiting market access for livestock, milk, and ghee. In addition, limited humanitarian assistance will affect poor households' access to food and nutritional and health services. Given the level of malnutrition which is *Very Critical* in all of the southern, agropastoral areas, accompanied with the expulsion of humanitarian agencies, there is an increased likelihood of malnutrition worsening during the entire scenario period.

During the April to June period, poor households in agropastoral areas will need to make distress sales of livestock including breeding stock. They will need to borrow to cover additional market purchases of food and will be heavily reliant on income from any agricultural labor they can acquire. Humanitarian agencies will be able to reach some accessible agropastoral areas and implement conditional and unconditional cash, voucher, and food distribution programs, especially in areas that are easily accessible from Ethiopia or Kenya. Between July and September, poor agropastoral households whose primary food source this time of year is typically from their own agricultural production will eat their harvested crop, seek social support and gifts, and send some household members to urban centers to seek temporary labor. Poor households that primarily rely on livestock will at this time experience a temporary improvement in income as livestock values rise right before Ramadan. Humanitarian agencies will continue to reach accessible agropastoral areas and implement conditional and unconditional cash, voucher, and food distribution programs.

Based on the high debt level, a limited number of remaining saleable livestock due to distress sales and losses last year, a lack of cereal stocks, limited food and milk gifts from better off households, reduced milk availability due to the lower overall herd size, expected reduced wage labor earnings, and a *Very Critical* malnutrition rate, poor agropastoral households can only meet their basic food needs through irreversible coping strategies such as sales of breeding stock or

other livelihood assets. Thus, all agropastoral livelihood zones in southern Somalia remain in Crisis (IPC Phase 3) with the exception of Hiran Agro-Pastoral livelihood zone which has relatively poorer access to labor income placing it in Emergency (IPC Phase 4). Poor households that rely more heavily on livestock than crops and self-employment will have better food security outcomes during the scenario period, if they are coming into this period with recovering and growing herds.

Northern and central pastoral livelihood zones in the Sool Plateau, Nugal Valley, and Coastal Deeh

Due to poor and erratic *Deyr* 2011/2012 rains received in these regions followed by a harsh and very hot *Jilaal* dry season, pasture and rangeland conditions as well as water availability significantly deteriorated in all parts of Coastal Deeh, Sool Plateau, and the Nugal Valley livelihood zones. Livestock migrated as early as February to the Hawd and Addun livelihood zones in Mudug region. There were extended distances to travel for water and for dry pasture. Water trucking was ongoing in *berket*-dependent areas pushing water prices as high as SOS 150,000 per 20 liter drum. Water and pasture depleted earlier than usual in Coastal Deeh which received moderate October to December *Deyr* rains. Pasture in this livelihood zone was under stress due to the influx of livestock from neighboring livelihood zones. Water prices ranged from around SOS 50,000 per 20 liter drum in January 2012 to SOS 100,000 per 20 liter drum in March. However, in the eastern part of Nugal Valley, shallow wells still held water until when the *Gu* rains began in April. In this area, shallow wells were sufficient for both human and livestock use.

Resource-based conflict in the Sool Plateau of Bari region has claimed both human life and productive assets. Intensified conflicts in Sool region have caused restrictions on trade and population movements, disruptions of economic activities, and disruptions of the transportation network. 5,800 people were displaced in January and February (UNHCR News Release, February 2012).

In the northeastern and central pastoral areas, increased drought-related diseases were reported over the January to March *Jilaal*, but no mass animal deaths occurred. Limited milk production significantly reduced market supply and consumption. Kidding and lambing have started at a low level, but they are expected to increase over the course of April. Milk prices increased in March 2012 by 7 to 36 percent compared to December 2011 across the livelihood zones with the exception of Elder and Erigabo market where camel milk prices are stable. The highest camel milk price of SOS 56,200 per liter had been observed on the Bossaso market. Milk prices will continue to increase until July 2012 when camels are expected to give birth. However, the poor tend not to own camels.

Except for Lasanod market in Sool region where prices have been unchanged from February to March, local goat prices have been increasing slightly since October 2011. In Burao, the largest livestock market in Somalia, local goat prices increased 43 percent from October to March in Somali shilling (SOS) terms. In general, goat prices are well above the five-year average.

Purchasing power measured by the terms of trade (ToT) between local quality goats and cereals has significantly improved in all northern and central regions. In March 2012, the ToT between local quality goat and sorghum increased between 37 and 81 percent compared to October. However, in Lasanod market, ToT did not improve.

In addition to the national assumptions described above, the following assumptions have been made:

- Medium to high kidding and lambing rates in April with poor milk production due to relatively poor pasture availability
- Low recovery process of livestock physical condition and herd size
- Some newly born goats and sheep may die due to the prolonged dry season in March and April.
- Continued water trucking increases debt levels and livestock off-take.
- Limited humanitarian access in Coastal Deeh livelihood zone of the central and Sool regions
- Trade restrictions affect inflows and outflows of essential commodities, especially cereals. The Lasanod market is especially vulnerable to trade disruption.

According to FSNAU's herd dynamics analysis (Figure 7), an increase in herd size is anticipated between January and June. Small ruminants will range between 26 and 32 heads per household at the end of June 2012 with the exception of Coastal

Deeh in Bari region where livestock holdings have reached an incredibly low level of 11 head per household. The increases are due to low, expected off-take as these pastoralists have limited saleable animals and are primarily depending on loans, labor income, and gifts, not livestock sales, for funding market purchases of food.

Figure 7: Poor households' sheep and goat herd sizes as of the start of January 2012 and the projection through June 2012

Livestock heard dynamics analysis						
Livelihoods	June - Dec 2011			Projected (Jan - June 2011)		
	Heard size as percent of Baseline	Percentage change from June'10	Dec.2012 Heard size	Heard size as percent of Baseline	Percentage change from June'10	Expected June 2012
Coastal Deeh (Central)	29%	4%	19 heads	41%	12%	26 heads
Coastal Deeh (Northeast)	15%	-4%	10 heads	17%	2%	11 heads
Sool Plateau (Bari)	58%	4%	32 heads	58%	0%	32 heads
Sool Plateau (Sanag)	43%	-11%	24 heads	56%	13%	31 heads
Nugal Valley (Northeast/Northwest)	37%	-5%	22 heads	49%	12%	30 heads

Source: FSNAU/FEWS NET

According to the food assistance and the agriculture and livelihoods clusters, targeted food assistance, support of water provision, and animal health programs are planned and being implemented in these pastoral areas. Poor households are also accessing both gifts and loans of food and cash. This increase in purchases on credit raised the debt levels to between USD 200 and USD 500 per poor household.

Fishing labor opportunities in coastal areas have been reduced due to a decline in demand from Yemen, the primary importer. As some fishing boats have been hijacked or robbed of their fuel, strengthening piracy activities in the Northeast and incidental attacks from international navy patrolling the Somali coast have also contributed to the decline in fishing labor opportunities in the Coastal Deeh livelihood zone.

Income from livestock will be lower than usual due to small livestock herd sizes due to high off-take and distress sales during past droughts. Poor goat milk production also limits income and food from livestock as kidding took place in the dry months of March and April.

Given the increasing debt levels, reduced fishing labor opportunities, limited saleable animals, high priced cereals, overstretched social support, poor milk availability, and the *Serious or Critical* malnutrition rates, poor pastoral households are only obtaining their basic food needs through loans and gifts.

Despite some income from labor and productive livestock sales all poor households are expected to rely heavily on food loans and social networks. In the most likely scenario between April and June, poor households in the North and Central Coastal Deeh pastoral livelihood zone will only likely maintain access to food through irreversible asset stripping such as the sale of up to 7 goats. Despite small ruminants kidding and lambing in late March to April which will result in a slight increase of milk availability, existing food consumption deficits are likely to remain. This zone will be classified as Emergency (IPC Phase 4) during the entire outlook period. Sool Plateau and Nugal Valley pastoral livelihood zones will only maintain access to market purchases of food through sales of assets estimated to be between 5 to 12 goats per household between April and May. These pastoral livelihood zones will remain in Crisis (IPC Phase 3) from April to June 2012. Expected camel births in July will improve access to milk gifts from middle and better off households. The simultaneous increase of livestock prices and decrease of cereal prices will further improve purchasing power. The increased income and food in the form of gifts and loans may prevent further deterioration but will likely not fully fill food deficits. Therefore, these pastoral livelihoods are likely to remain in Crisis (IPC Phase 3) from July to September despite experiencing some improvements.

South-East Pastoral livelihood zone in Lower and Middle Juba regions

Both the October to December *Deyr* 2010/11 and the April to June *Gu* 2011 rainfall performed poorly. Roughly, over 40 percent of the cattle died from November 2010 to July 2011. Livestock prices dropped to their lowest recorded levels.

Livestock conceptions and birth rates were very low in 2011. However, good October to December *Deyr* 2011/12 rainfall performance reversed the drought conditions and regenerated both pasture and most of the water catchments. Over the course of the January to March *Jilaal*, there was average availability of pasture and water resulting in improved livestock body condition and conception rates as well as milk production. Cattle milk supply in the markets improved, and the average of the cow milk prices in South-East Pastoral reference markets in Afmadow and Hagar are 10 and 94 percent higher than last year and the five-year average, respectively.

Livestock prices in Juba regions have increased since December 2010. In March, a local quality goat in South-East Pastoral reference markets in Lower and Middle Juba regions increased by 111 percent compared to last year. This is due to rising demand in major, regional towns such as Kismayo and Doblei, improved livestock body conditions, and a low market supply due to past droughts resulting in low livestock holdings at the household level. Similarly, cattle prices increased 63 percent compared to a year before. This is partly as a result of improved access and demand at the Garissa, Kenya cattle market in addition to better body conditions and the low supply on markets.

Due to recent International Committee of the Red Cross (ICRC) and World Food Program (WFP) food distribution in areas currently controlled by the TFG and the Kenyan military, the supply of cereals has improved in Lower and Middle Juba. Also, the off-season harvest in the Juba riverine in March 2012 has added small volumes to local supply. Imported red rice and white maize prices are thus reduced in price across Lower and Middle Juba. However, maize prices in South-East Pastoral reference markets are still 29 percent higher than their five-year averages, and they remain the highest maize prices in southern Somalia. Water prices in key reference markets of southeast pastoral such as Afmadow and Hagar declined by 36 and 40 percent over six months and one year, respectively, but they remain nine percent higher than the five-year average. In March 2012, one local quality goat could fetch 79 kg of white maize in the South-East Pastoral livelihood zone of Middle and Lower Juba. This represents a 62 percent increase in ToT since October and a 117 percent increase compared to last year. Similarly, a local quality cattle could fetch 309 kg of white maize in March which is 61 percent higher than October. Daily wage rate in the zonal reference markets that are for non-agricultural labor such as collecting building materials, loading and unloading trucks, and other manual work. They increased in March 2012 by 40 percent since October. This increase is because of high population displacement to Kenyan refugee camps due to insecurity and drought, thus limiting the number of laborers in rural areas. Poor households are still accessing loans for food and livestock inputs which raised their debt levels to an average of USD 170 per household. These households have recovering assets, and they should be able to continue to access new credit throughout the scenario period.

Over 245,000 people in Lower Juba region received cash relief, WASH, shelter, education, nutritional, and health assistance in the first two months of the year. Poor pastoralists receive social support, but this support is weaker than usual due to the increasing number of destitute households and the recent losses of livestock assets by the middle and better off.

In addition to the national assumptions described above, the following assumptions have been made:

- Expected average *Hagaa* rains from June to August will replenish some water sources and help regenerate pasture following the below average *Gu*.
- Humanitarian access is expected to decline during the dry months due to increasing clashes between TFG/AMISOM and armed groups in Lower and Middle Juba.
- Trader movement will be reduced due to increased conflict. The cereal supply in local markets will decrease, and prices will increase due to the reduction in trade.
- Displacement will increase in this region, primarily from conflict-affected rural areas to urban centers during dry months.

According to FSNAU's Post-*Deyr* 2011/12 projected herd dynamics, herd sizes are expected to increase between January and June 2012. At the start of 2012, poor pastoral households had five cattle and nine sheep and/or goats. A significant increase for the small ruminants is projected and likely to reach 12 sheep and/or goats due to medium to high kidding and lambing rates over the March and April birth period. Pastoralists in the South-East Pastoral livelihood zone have limited saleable animals, so they are currently dependent on loans, labor income, and gifts. A high rate of cattle births are expected in July 2012 due to the high conception rate in October. This will increase both the herd size and milk production during the latter half of the scenario period.

Given a *Very Critical* malnutrition rate accompanying limited access to humanitarian assistance, there is an increased likelihood of malnutrition worsening between April and June but slightly improve between July and September. Poor households in South-East Pastoral livelihood zone will depend on food purchases between April to June, and income from livestock will be lower than average due to poor goat milk production as kidding took place in the dry months of March and early April. Cattle will not give birth in late July. Despite some income from labor and livestock sales, all poor households are expected to rely heavily on loans and social support. Between April and June, poor households will only engage in irreversible asset stripping such as the sale of eight goats if they are unable to obtain enough credit to cover food purchase. In late March to April, small ruminants will give birth, and milk availability will increase. However, a high cattle birth rate is expected in July and August, hence milk production will increase. Milk consumption and income from livestock sales will improve food access and reduce malnutrition levels in the second half of the scenario period. Therefore, given the expected increase in herd size, the seasonal increase in livestock prices, the accompanying decrease of cereal price, and the increase of milk production, food consumption will increase from July to September. While in Emergency (IPC Phase 4) from April to June, this livelihood zone will improve to Crisis (IPC Phase 3) from July to September.

Other Areas

In Bay Agro-Pastoral High Potential livelihood zone, poor households have cereal stock from the above average *Deyr* 2011/12 harvest in January (FSNAU Post *Deyr* 2011/12). Red sorghum prices have reached their lowest point since March 2008. In Baidoa, they are 43, 58, and 39 percent lower than October 2011, last year, and the five-year average, respectively. The recent onset of moderate *Gu* 2012 rains have increased agricultural labor demand and stabilized wage labor rates. Agricultural labor to red sorghum ToT have increased 400 percent over the last six months from October to March. With access by two adult household members to ten days of agricultural labor each month, labor income in this livelihood zone is currently enough to fund the minimum food expenditure in the MEB. However, households would be unable, through 20 days of labor income alone at that level, to meet the full cost of the minimum expenditure basket (MEB) and also pay off their debts accrued last year.

In agropastoral areas of the Shabelle Valley, poor households are estimated to have cereal stocks from their own production through June (FSNAU post *Deyr* 2011/12 crop analysis). In March, white maize prices have recorded their lowest levels since March 2008. In Qorioley market, they are 29, 48, and 14 percent lower than October 2011, last year, and the five-year average, respectively. Recent light to moderate rains in most of the Shabelle Valley improved agricultural labor demand and increased wage rates to their highest level since October 2010. Purchasing power measured by day agricultural labor rate to white maize ToT has significantly increased due to the reduced cereal prices and increased labor wage rates. Average agricultural labor to white maize ToT increased 57 percent and 62 percent, respectively, in Lower and Middle Shabelle regions. Labor income, coupled with humanitarian interventions, and households cereal stocks have provided poor households to purchase the minimum expenditure basket (MEB) using income from 20 days of labor per month.

In Central Regions Agro-Pastoral which includes much of the cowpea belt, poor households are primarily dependent on market purchases of food. Since the *Gu* in 2010, it was only the recent October to December *Deyr* 2011/12 season during which this region received near average rainfall totals. Though production of cowpea was near average during the *Deyr* harvest in December, cowpea prices recorded their lowest level since February 2010 during March. They declined by 62, 51, and 4 percent compared October 2011, last year, and the five-year average, respectively. After being very high during most of 2011, the reduction in cowpea prices has also significantly affected income from crop sales in this region. Currently a kilogram (kg) of cowpeas is worth the same amount as 1.6 kg of red sorghum in cowpea belt reference markets such as Elder and Xaradhere. This is 26 percent lower than last March. In addition to declining income, both humanitarian interventions and labor opportunities are limited due to conflict. Income from self employment including charcoal burning, firewood collection, and the collection of construction stones, social support in the form of cash, food gifts, and loans, and livestock sales including possible distress sales are the primary sources of income for the poor and are maintaining their ability to make market purchases of food.

Worst Case Scenario

In the worst-case scenario, the April to June *Gu* 2012 will be less than ~60 percent of average. Escalating insecurity will affect more parts of the South, the Sool Plateau, Sanaag region, and central regions. In agropastoral areas and other areas of lower agricultural productivity, it would be assumed that very little planting takes place and that the subsequent *Gu*

harvest will be a near total crop loss. Significant food consumption deficits would be possible due to limited income sources and livelihoods disrupted by conflict and poor rainfall. A poor season would reduce both pasture and water availability in most agropastoral areas of Lower and Middle Juba, Gedo, Bakool, Hiran, and Middle Shabelle. Crop production would be well below average, and staple cereal prices would rise above their usual seasonal increases. Income from agricultural labor and poor household cereal sales would decline during the scenario period. An increase in the number of areas classified as Emergency (IPC Phase 4) would occur during the second half of the scenario period as the effects of the poor *Gu* harvest were felt across the region and as the dry season further depleted pastoral resources. Between July and September agropastoral areas of southern Somalia would likely face a near crop failure, resulting in limited or no cereal stocks at the household level. Income from agricultural labor including weeding, harvesting, threshing, packaging, and transporting and livestock sales would significantly decline. Cereal prices would tend to increase. Therefore, poor households' food security would likely deteriorate further to Emergency (IPC Phase 4) unless there were significant improvements in humanitarian access.

Other Alternative Scenarios

Two primary changes to assumptions could substantially alter the most likely scenario with largely positive impacts on food security outcomes for the populations of concern. If humanitarian access were to increase substantially due to a stabilization in the conflict situation in central and southern Somalia, humanitarian program implementation would likely be much better. Coverage would be much more complete than assumed in the most-likely scenario. If this occurs, poor households' food access would be substantially better than expected. There would be less deterioration between the current and projected food security outcomes. If the April to June *Gu* rains were much closer to average in volume and more evenly distributed across both time and space, crop production in rainfed areas would be much better. Pasture and water regeneration would also improve. In this case, poor households would likely have better access to food in the second half of the scenario period from July to September during and following the *Gu* harvest.