

Food Security & Nutrition

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Special Brief - Post *Deyr* 2010/11 Analysis

This special FSNAU brief provides a summary of the key findings of the post *Deyr* 2010/11 Assessment and Analysis, which are the result of fieldwork (15 Dec 2010 – 6 Jan 2011); a national analysis workshop (9 – 21 January 2011); and a Technical Verification and Partner Vetting Meetings (Nutrition, 24 January 2011 and Food Security, 26 January 2011). FEWSNET Somalia along with 103 partners, including regional authorities, UN and international agencies, and local and international NGOs participated and supported in this post *Deyr* 2010/11 assessment and analysis process. FSNAU presented these results in Nairobi at a Somalia Support Secretariat Special Meeting on 28 January 2011 and issued a Press Release on the same day. The press release and presentation are available on the FSNAU website (www.fsnau.org).

Climate

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**Civil
Insecurity**

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Regional
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**Integrated
Food Security
Analysis**

KEY FINDINGS

The findings of the FSNAU, FEWSNET and partner post *Deyr* 2010/11 seasonal assessment indicate that the number of people in need of humanitarian assistance in Somalia has increased by 20 percent to 2.4 million. **This represents 32 percent of Somalia's 7.5 million people.** Failure of the *Deyr* seasonal rains linked to prevailing La Niña event affecting Somalia, caused a severe water crisis in most parts of the country with the exception of north-western regions. The dry conditions have also resulted in substantial crop harvest failure in the South and Central crop-producing regions. The resulting dramatic increases in the prices of water and local cereals are the main drivers of the deteriorating food security situation in Somalia. The situation is exacerbated by the sustained conflict, which continues to be the primary reason of displacement affecting southern and central parts of the country. FSNAU identifies about 910,000 of Internally Displaced Populations (IDPs) as a single population in crisis; in addition, **940,000 people in Acute Food and Livelihood Crisis (AFLC) and 535,000 in Humanitarian Emergency (HE)** are concentrated in rural and urban areas. In rural areas the ongoing widespread humanitarian crisis affects about one million drought-stricken people with rising numbers of destitute pastoralists currently estimated at 45,000 people (7 percent increase from *Gu* 2010). This increase is attributed to the worsening situation in Coastal *Deeh* and Central Agropastoral (Cowpea Belt) that have suffered from several consecutive seasons of drought. Additionally, 475,000 urban poor with severely stressed purchasing power due to soaring food prices are also in crisis. Somalia's nutrition situation has also deteriorated in the last six months of 2010 due to a combination of factors such as the deteriorating food security situation, lack of clean water which increases diarrhoeal disease and reduced access to milk. The number of malnourished children increased by about 7 percent and is currently estimated at **241,000 children under 5 years of age as acutely malnourished, of which 57,000 are severely malnourished.** Southern regions are worst affected, hosting 75 percent (or 181,000) of all caseloads of acute malnutrition and 80 percent of all the severely malnourished children.

Large-scale Crop Failure Affecting Farmers in the South

Population in agropastoral and riverine areas of southern Somalia, who predominantly rely on rainfall for subsistence farming, have suffered from a significant decline of the *Deyr* 2010 cereal crop production, which is only one-fifth of the normal short rain season production. As a result, in the South, the number of people in crisis increased by almost 70 percent in agropastoral and riverine areas and currently stands at 440,000 people. Considering that this is the 2nd cropping season of the year, while the preceding *Gu* season yielded an exceptionally good harvest, cereal stocks are still available in many areas. Therefore, the increase in the number of people in crisis was relatively modest compared to the crop losses experienced in this season. Agropastoral livelihoods in the South are more affected compared to riverine communities, as the former experienced a complete failure of crop harvest. Therefore, 76 percent of the affected farmers are from agropastoral livelihoods. However, Hiran riverine livelihood has the largest proportion of the population in crisis (89% of the livelihood's population) due to 8 consecutive seasons of significant crop losses.

Accelerated Urban Food Security Crisis

Significant increases in local cereal prices caused by cereal crop harvest failure and speculation by traders in the South, primarily affected the market dependant urban households and resulted in a considerable 52 percent increase of urban population in crisis since the post-*Gu* 2010. Currently, 475,000 of urban poor are estimated to be in crisis, of whom 38 percent are in **Humanitarian Emergency**. Food access of the affected population is constrained by high food prices, increased competition from drought-affected rural population and IDPs for scarce job opportunities and social support as well as lack of humanitarian support. The rising cost of living has eroded the purchasing power of large numbers of urban poor and IDPs restricting their access to food, particularly in South, Central as well as in parts of the North. However, in Somaliland Shilling areas (SISh) of the Northwest the situation has improved, partly due to the bumper *Gu/Karan* harvest in October 2010, which led to a considerable decline in locally-produced cereal prices.

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The Drought Affects Pastoral Livelihoods

The pastoral areas in most of the country are severely affected by the water crisis caused by largely failed *Deyr* rains. The rural population in crisis in pastoral areas is currently estimated at 435,000. The pastoral livelihoods most threatened by the water crisis, given the high water and fodder requirement, are those with cattle and sheep, which have limited ability for migrating long distances. These pastoralists are predominantly found in Central (Coastal *Deeh*) and Juba regions. The worst situation is in the livelihood zones of Coastal *Deeh* (Central, Middle Shabelle and Nugaal regions), Cowpea Belt (Central and Middle Shabelle regions) as well as Southern Inland Pastoral of Hiran region, where livestock (cattle, sheep and goat) deaths due to the scarcity of water and pasture were reported.

Increasing Numbers of Internally Displaced People (IDPs)

Number of IDPs abandoning their homes and livelihoods to escape the rampant conflict in southern and central parts of Somalia increased up to 1.46 million people (4%) in the second half of 2010. Nearly half of the IDPs are integrated in rural and urban communities and share the plights of drought-stricken population. The IDPs considered outside of the rural and urban numbers from FSNAU are currently estimated at 910,000 and represent 2nd largest single population group in crisis. These IDPs are equally affected by soaring food prices, limited humanitarian support, particularly those in South and Central with malnutrition rates above 20 percent.

Alarming Nutrition Situation in the South

With an estimated 241,000 children acutely malnourished, of whom 57,000 are in severe state, reflecting about 7 percent increase in the cases, Somalia's nutrition situation has deteriorated in the last six months of 2010. The South, currently in **Critical** to **Very Critical** phases, is worst affected, and host 75 percent (or 181,000) of all caseloads of acute malnutrition and 80 percent of all the severely malnourished children. Based on median rates of acute malnutrition in the South, **one in four children is acutely malnourished, and one in twenty-three severely malnourished**. The nutrition situation in the South remains as one of the worst in the world with shrinking humanitarian aid and reduced access to basic services, such as health care and clean water, severely constraining children's capacity to meet their development potential. However, in the central and northern regions, there are short term improvements attributed to the after effects of the good *Gu* 2010 (April-June) rains and access to humanitarian interventions.

Table 1: Somalia Integrated Food Security Phase Classification, Population Numbers, January - June, 2011

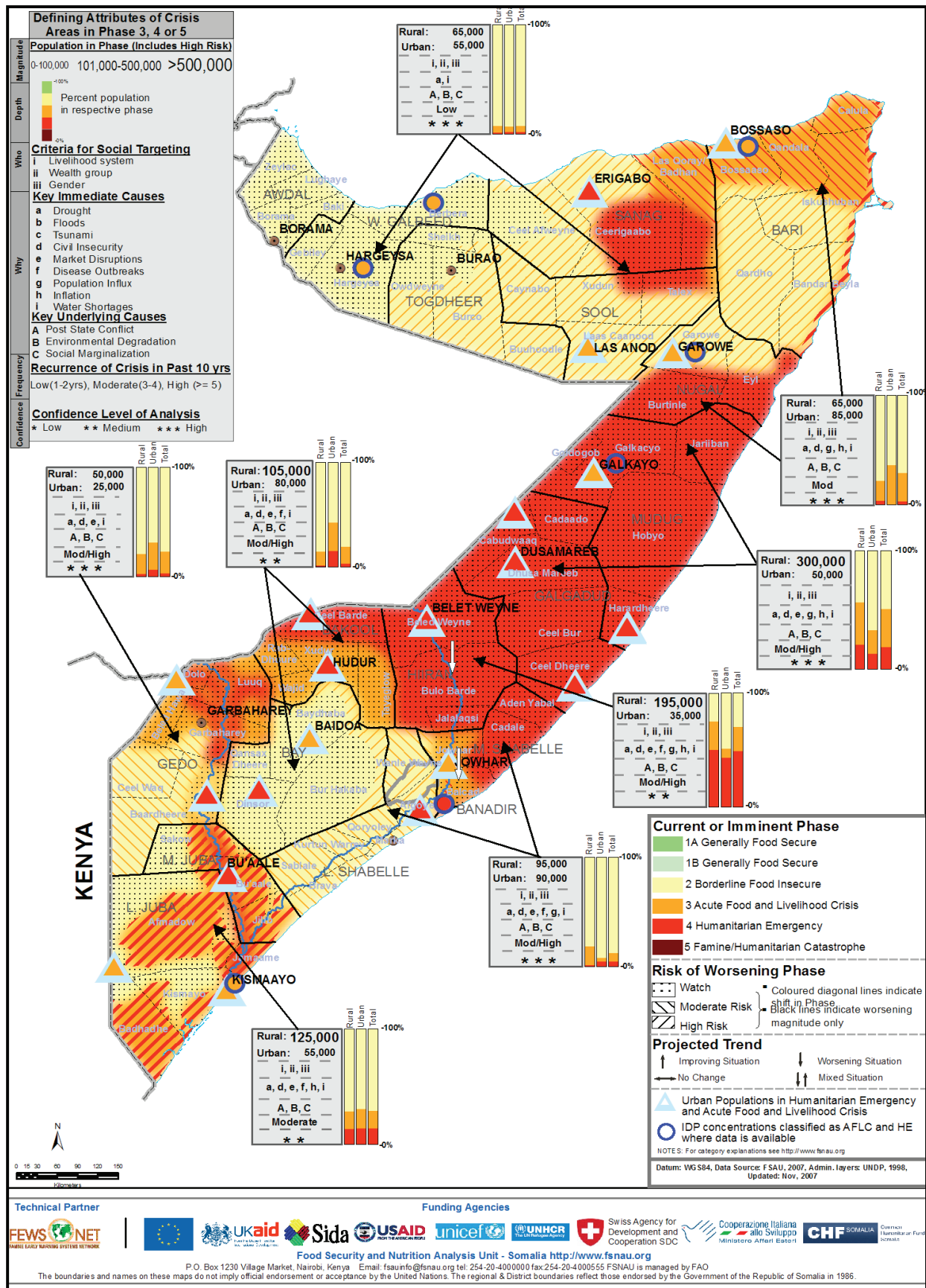
Region	UNDP 2005 Total Population	UNDP 2005 Urban Population	UNDP 2005 Rural Population	Urban in Acute Food and Livelihood Crisis (AFLC)	Rural in Acute Food and Livelihood Crisis (AFLC)	Urban in Humanitarian Emergency (HE)	Rural in Humanitarian Emergency (HE)	Total in AFLC and HE as % of Total population
North								
Awdaal	305,455	110,942	194,513	0	0	0	0	0
Wogooyi Galbeed	700,345	490,432	209,913	0	0	0	0	0
Togdheer	402,295	123,402	278,893	0	15,000	0	0	4
Sanaag	270,367	56,079	214,288	20,000	25,000	15,000	15,000	28
Sool	150,277	39,134	111,143	20,000	10,000	0	0	20
Bari	367,638	179,633	202,737	60,000	40,000	0	5,000	29
Nugaal	145,341	54,749	75,860	25,000	15,000	0	10,000	34
Sub-total	2,341,718	1,054,371	1,287,347	125,000	105,000	15,000	30,000	12
Central								
Mudug	350,099	80,997	131,455	30,000	90,000	0	50,000	49
Galgaduud	330,057	58,977	271,080	0	100,000	20,000	60,000	55
Sub-total	680,156	139,974	402,535	30,000	190,000	20,000	110,000	51
South								
Hiraan	329,811	69,113	260,698	5,000	65,000	30,000	130,000	70
Shabelle Dhexe (Middle)	514,901	95,831	419,070	20,000	70,000	0	15,000	20
Shabelle Hoose (Lower)	850,651	172,714	677,937	15,000	10,000	55,000	0	9
Bakool	310,627	61,438	249,189	5,000	90,000	25,000	5,000	40
Bay	620,562	126,813	493,749	45,000	10,000	5,000	0	10
Gedo	328,378	81,302	247,076	20,000	45,000	5,000	5,000	23
Juba Dhexe (Middle)	238,877	54,739	184,138	0	30,000	25,000	30,000	36
Juba Hoose (Lower)	385,790	124,682	261,108	30,000	35,000	0	30,000	25
Sub-total	3,579,597	786,632	2,792,965	140,000	355,000	145,000	215,000	24
Banadir	901,183	901,183	-	-	-	-	-	0
Grand Total	7,502,654	2,882,160	4,482,847	295,000	650,000	180,000	355,000	20

Assessed and Contingency Population in AFLC and HE	Number affected	% of Total population	Distribution of populations in crisis
Assessed Urban population in AFLC and HE	475,000	6	20%
Assessed Rural population in AFLC and HE	1,005,000	13	42%
Estimated number of IDPs (UNHCR)	1,465,000	20	-
Adjusted IDP to avoid double counting in Rural IPC	910,000	12	38%
Estimated Rural, Urban and IDP population in crisis	2,390,000 – rounded to 2.4 million	32	100.0%

Notes:

- Source: Population Estimates by Region/District, UNDP Somalia, August 1, 2005. FSNAU does not round these population estimates as they are the official estimates provided by UNDP
- Estimated numbers are rounded to the nearest five thousand, based on resident population not considering current or anticipated migration, and are inclusive of population in High Risk of AFLC or HE for purposes of planning
- Dan Gorayo is included within Bari Region following precedent set in population data prior to UNDP/WHO 2005
- Source UN-OCHA/UNHCR: New IDP updated September, 2010 rounded to the nearest 5,000. Total IDP estimates are based on Population Movement Tracking data which is not designed to collect long-term cumulative IDP data
- Analysis show that 60% of IDP originates from Mogadishu. To avoid double counting, only IDPs originating from Mogadishu are considered in the overall population in crisis. This is because FSNAU does not conduct assessments in Mogadishu and those IDPs from other regions are already considered in the overall IPC analysis. FSNAU does not conduct IDP specific assessments to classify them either in HE or AFLC
- Actual figure is 2,390,000 rounded to 2,400,000
- Percent of total population of Somalia estimated at 7,502,654 (UNDP/WHO 2005)

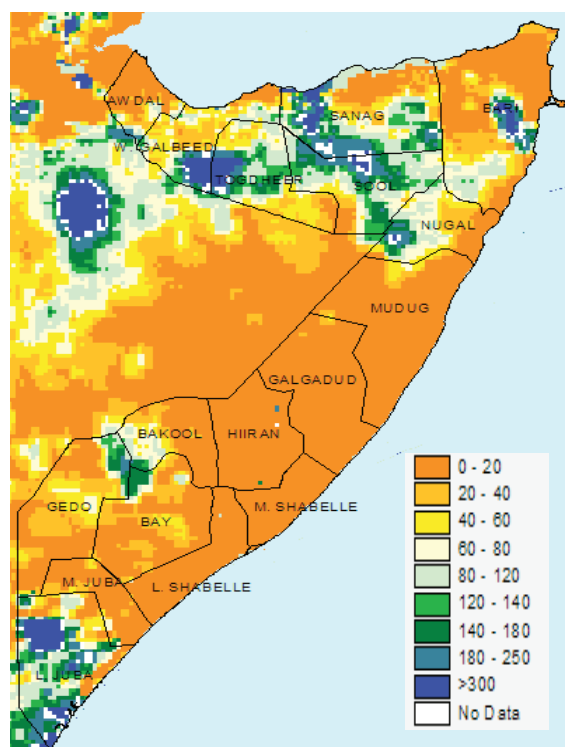
Map 1: Somalia Integrated Food Security Phase Classification, January - June, 2011



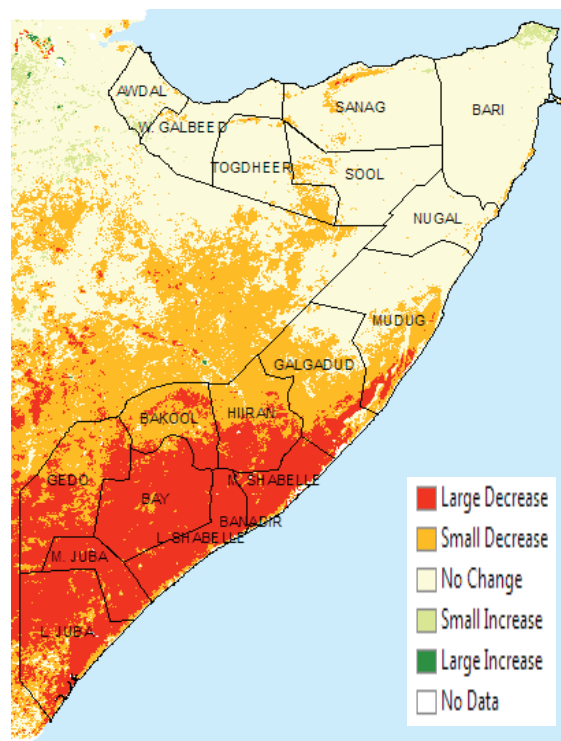
SECTOR HIGHLIGHTS

CLIMATE

Map 2: Percent of Normal Rainfall, Oct – Dec 2010



Map 3: December 2010 NDVI Absolute Difference from LTM



The *Deyr* 2010 seasonal rain performance (Oct. to Dec.) has been extremely poor in most parts of the country due to the effect of the La Niña event. A comparison of rainfall data between the *Deyr* 2010 and the long-term mean (LTM) of the same season shows that most parts of the country received 0-20 percent of the normal rainfall levels. The seasonal precipitation varied in temporal and spatial distributions across the country during October. However, during the months of November and December, the dry spell persisted throughout Somalia. In October, some pastoral areas in the North, such as Golis-Guban zone, most of Awdal and Galbeed and parts of Togdheer regions received light to moderate rains (1 to 50mm) following good *Karan* rains in September. A similar amount of *Deyr* rain fell in October in pockets of Central and Northeast including Hawd of Burtinle, Galdogob and Galkayo and Golis of Alula. Nevertheless, the overall performance in terms of intensity and total amount was very poor in the Central and Northeast. In the South, the rains were erratic and significantly below normal across most livelihoods during October, while pockets of Afmadow and Badhadhe received some light showers in late November (Map 2).

The satellite derived Normalized Difference Vegetation Index (NDVI) for the last dekad of December shows extremely poor vegetation compared to LTM (1999-2010) particularly in southern and central Somalia (Map 3). Particularly a, large deterioration of vegetation in pastoral areas is observed in pockets of Sool, Sanaag, south-east of Togdheer and Central. However, the satellite imagery, confirmed by ground reports, indicates relatively better pasture conditions in parts of Northwest and pockets of Northeast regions (Alula district). Rapid decline in vegetation is expected during the dry *Jilaal* season.

CIVIL INSECURITY

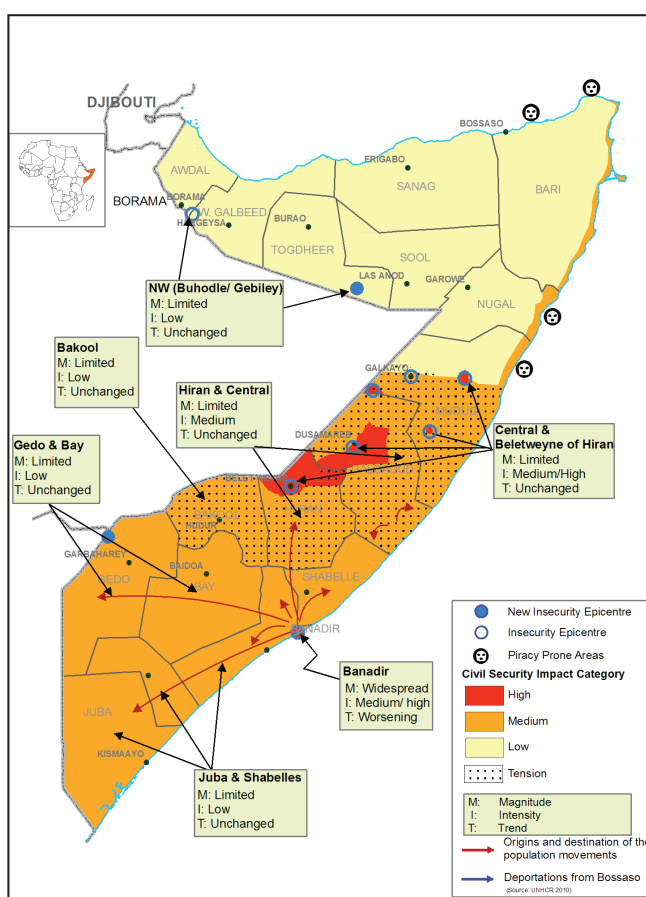
Civil insecurity remains one of the main driving factors influencing the food security situation in Somalia. The country suffers from a protracted political conflict spanning back to the early 1990s, which continues to recur and impact primarily urban livelihoods. Mogadishu, Hirran (Beledweyne) and Galgaduud (Dhusamareb) remained the epicenter of the politically-driven conflicts, with periodic clashes in North Bakool, which extended to southern part of Gedo region (Beledhawa town) from mid-October 2010. In addition, clan conflicts over pasture and water resources have persisted in the wake of the drought in pockets of the Central (e.g. Godad and Xeraale) and in the North (particularly in Kalshaale) restraining utilization of the water and pasture resources by the drought-affected pastoral people in these zones (Map 4).

In the coastal zones of Central and Northeast, continuing presence of sea piracy considerably affects the fishing economy, undermining the food access of the coastal communities in these zones.

It is important to note, however that the insecurity in Somalia is affecting the Somali livelihoods both directly and indirectly in different ways. As such, in addition to human deaths and destruction of assets, there are continuous widespread population displacements from the main conflict-prone urban centers within the country and outside. The United Nations High Commissioner for Refugees (UNHCR) for Somalia estimated that, on average, 24,000 people were displaced on a monthly basis between July and December 2010. About 85 percent of these displacements were resulting from conflicts in Mogadishu and other parts in the South. Currently, about 1.46 million people are displaced inside the country.

Other effects of the conflict are reflected in the disrupted economy; restricted market and trade activities, particularly in the Central, Hiran (Beledweyne) and Mogadishu; and limited humanitarian access and assistance to support the most in need, in the southern and central parts of the country.

Map 4: Somalia Insecurity Outcomes, December, 2010



Source: FSNAU, January, 2010

AGRICULTURE

Deyr is a secondary agricultural season (short rains), which contributes about 30 percent to the total annual cereal production, while most of the production comes from the *Gu* season. However, as a result of poorly and unevenly distributed rains experienced in the last *Deyr*, there has been substantial reduction in cereal production in southern Somalia, which is the lowest level since 1995. The current cereal production estimates of 21,000MT (15,000MT of maize, 3,000MT of sorghum and 3,000MT of rice) indicate about 80 percent decline compared to the *Deyr* Post-War Average (PWA 1995-2009), as well as the *Deyr* 5-year average (2005-2009) (Table 2).

Table 2: *Deyr* Cereal Production Estimates in Southern Somalia

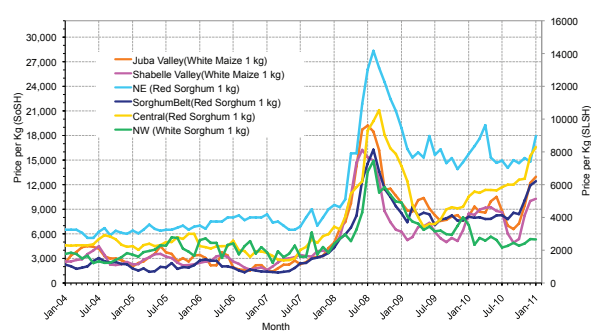
Regions	<i>Deyr</i> 2010 Production in MT			<i>Deyr</i> 2010 as % of <i>Deyr</i> 2009	<i>Deyr</i> 2010 as % of <i>Deyr</i> PWA (1995-2009)	<i>Deyr</i> 2010 as % of 5 year average (2005-2009)
	Maize	Sorghum	Total Cereal			
Bakool	100	100	200	8%	10%	7%
Bay	0	2,700	2,700	4%	9%	8%
Gedo	1,200	0	1,200	26%	21%	17%
Hiran	300	200	500	24%	7%	9%
Juba Dhexe (Middle)	200	0	200	2%	4%	4%
Juba Hoose (Lower)	100	0	100	7%	9%	24%
Shabelle Dhexe (Middle)	5,300	0	5,300	51%	46%	73%
Shabelle Hoose (Lower)	7,700	0	7,700	34%	23%	34%
TOTAL	14,900	3,000	17,900	14%	19%	21%

Most of the *Deyr* 2010/11 cereal harvest was collected in the riverine livelihoods and irrigated areas, while agropastoral areas experienced almost a complete failure (95%) of the rain-fed sorghum harvest. Maize crop collected predominantly in the riverine areas, was also severely affected by poor rainfall, decline of river levels, poor river management and irrigation infrastructure. Shabelle regions, with a current estimate of 16,000MT of cereal production (including rice), account for about 76 percent of the total *Deyr* 2010 cereal production of southern Somalia. The production is considerably below the PWA in Middle Shabelle (46% of PWA), Lower Shabelle (23% of PWA) as well as Gedo

(21% of PWA) regions. However, extreme cereal harvest failure (90-95% decline) is recorded in the regions of Middle Juba (4% of PWA), Hiran (7% of PWA), Lower Juba (9% of PWA), Bay (9% of PWA) and Bakool (10% of PWA). The cash crop production (onion, sesame, rice, cowpea and hot pepper) has similarly been affected, with a current estimated production of 15,700MT (with off-season sesame and cowpea) being 64 percent lower compared to *Deyr* 2009/10. In contrast, cereal crop harvest (Oct-Nov'10) was extremely good in agropastoral areas of Awdal, Galbeed and Togdheer regions, due to favorable performance of *Gu/Karan* 2010 rains, agricultural interventions (provision of tractor hours, farm inputs etc) by various agencies and increased cultivated area. The cereal production estimates in these regions are the highest in more than a decade, equivalent to 72,000MT (402% of the PWA).

Despite the *Deyr* 2010 cereal harvest failure, annual cereal (maize and sorghum) production estimates of 225,000MT (without *Deyr* off-season maize) for southern Somalia are still at 94 percent of the annual PWA, which is attributed to bumper *Gu* harvest (137% of *Gu* PWA) in 2010 (see Technical Series Report No VI.33, Sep. 27, 2010). Moreover, FSNAU cereal availability analysis indicates various levels of cereal stock availability in southern regions from *Gu* 2010, *Gu* 2010 off-season and *Deyr* 2010 harvests. The current maize stocks in Shabelle riverine areas are estimated to last up to 10 – 12 months and possibly even longer in Lower Shabelle, as shown by the analysis. The maize stocks are also available in Middle Juba (5 months) and Gedo riverine livelihoods (3 months), while sorghum stocks are estimated to last a few months in Bay (5) and Middle Juba (3) agropastoral areas. However, there is no cereal stock availability in other regions, due to low crop production in the last and current seasons.

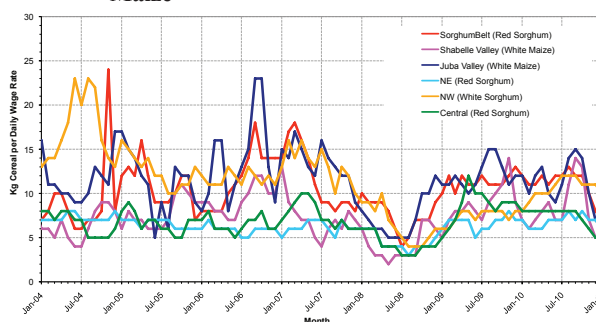
Figure 1: Regional Trends in Cereal Prices (SoSh/SiSh)



Local Cereal Prices and Terms of Trade

The extremely low *Deyr* 2010 cereal production resulted in a sharp increase in local cereal (sorghum and maize) prices in southern and central Somalia (Figure 1). The price rises are mostly due to increased farmer/trader hoarding of available cereal stocks following the *Deyr* harvest failure and uncertainty in the behaviour of the next crop season (*Gu* 2011). On average, sorghum prices increased by 80 percent in the regions of Sorghum Belt, while maize prices are 57 percent higher in maize producing regions of Shabelle and Juba compared to December 2009 levels. The increases are also significant in central regions (67%), which mostly get cereal supplies of red sorghum and white maize from southern Somalia. Conversely, the white sorghum prices have reduced since December 2009 (25-41%) and are lowest since the inflation year of 2008 in Northwest main markets, due to the bumper *Gu/Karan* 2010 harvest. Prices of locally produced cereals in southern Somalia are likely to continue an increasing trend up until the next harvest, as stocks continue to reduce, as it has already been demonstrated by cereal price increases in January.

Figure 2: Shabelle and Juba Riverine TOT Labour to Maize



The low agricultural activities, as a result of *Deyr* crop failure, deprived poor households in most crop-producing livelihoods of on-farm labour opportunities, and led to decrease in labour wages. Therefore, the purchasing power of poor households has been severely affected.

The terms of trade (ToT) between labour and cereals (maize and sorghum) in December 2010 have dropped in Shabelle (50%), Juba (60%), the Sorghum Belt (up to 80%) and central regions (67%) when compared to December 2009. However, the largest decline of 80 percent in the same period is observed in central regions. In contrast, the ToT in Northwest indicates an increasing trend (20 – 60%) between December 2009 and December 2010, due to the decline of white sorghum prices (Figure 2) FSNAU will continue close monitoring of labour availability and cereal prices in the coming months.

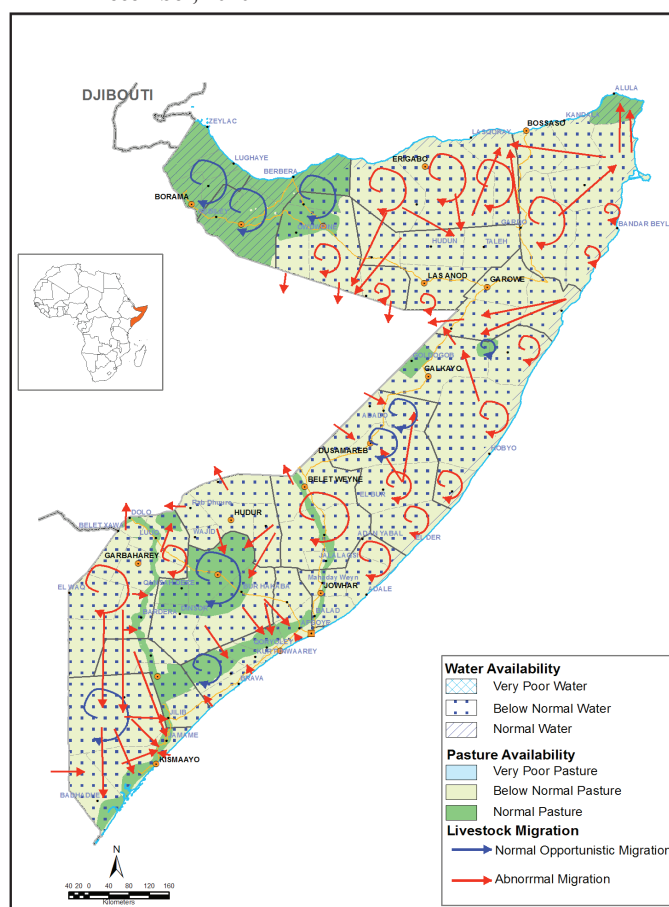
LIVESTOCK

Pasture and water conditions

Pasture and water conditions have deteriorated in most parts of Somalia as a result of the poor performance of the *Deyr* rains. As the water sources (*berkads*, streams, communal dams) started drying up due to the seasonal rain failure in most pastoral areas of the country, early water trucking started as from the month of November, resulting in a significant increase of water prices. Normal water and/or pasture conditions are only observed in areas with moderate precipitation such as most grazing sites of Hawd Pastoral, Golis/Guban Pastoral, Awdal and Togdheer Agropastoral livelihood zones in the Northwest, as well as localized areas of Bay and Lower Shabelle regions (Map 5).

Scarcity of pasture and water in most pastoral and agropastoral livelihoods zones of the country prompted abnormal migration of livestock. The better-off and upper middle wealth groups in Central, Hiraan and North have migrated to isolated areas with dried pasture far from water sources and depend on water trucking for both for livestock and own consumption. Some pastoralists have migrated to the Somali region of Ethiopia. In the South, pastoralists have predominantly migrated towards the riverine areas of Juba and Shabelle valleys. This is despite the risk of their livestock being exposed to trypanosomiasis (a disease transmitted by tsetse fly common in riverine areas). Due to stressed water and fodder resources, some pastoralists reportedly purchased standing crops for animal feed, while others are renting riverine farms for fodder use.

Map 5: Somalia, Rangeland Conditions and Livestock Migration, December, 2010



Source: FSNAU, December, 2010

Livestock Body Conditions and Herd Dynamics

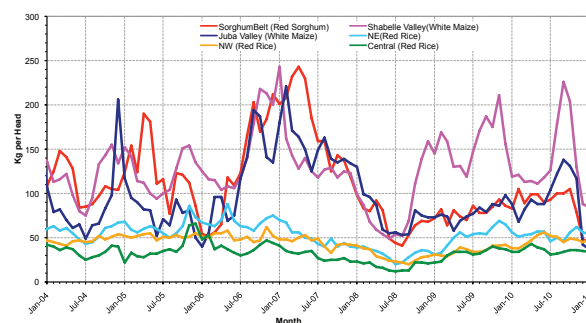
In W. Galbeed and Awdal regions and agropastoral areas of Togdheer in the Northwest, livestock maintained average body condition due to normal pasture as a result of good *Gu/Karan* 2010 rains and normal *Deyr* rains in October and early November. However, livestock body condition has deteriorated in other parts of Northwest (Togdheer, Sool and Sanaag), as well as Northeast, Central, Hiran and other southern regions, especially for cattle and sheep, due to pasture and water scarcity and largely limited migration options to neighbouring regions with equally poor pasture and scarce water. Therefore, most of the off-spring and milking animals in these areas are unlikely to survive during the long *Jilaal* dry season. Camel body conditions remain normal in most areas, apart from Hiran and Central where the signs of deterioration have been observed. The worst situation is in the livelihood zones of Coastal *Deeh* (Central, Middle Shabelle and Nugaal regions), Cowpea Belt (Central and Middle Shabelle regions) as well as Southern Inland Pastoral of Hiran region, where livestock (cattle, sheep and goat) deaths due to the scarcity of water and pasture were reported.

The effects of the drought resulted in low to none conception rates for all livestock species in *Deyr* 2010/11. Calving of camel and cattle was also low to none in most drought-affected regions of the country due to high conception during *Gu* 2010. The exceptions were in Juba, Shabelle, Gedo and Bay regions, where a medium rate of cattle calving was observed in *Deyr* 2010/11. However, the lambing and kidding rates were medium to high in all pastoral and agropastoral livelihoods. As a result of very low rates of calving for camel and cattle, milk production is low in most regions of the country. The exceptions are Juba, Bay, Awdal and W. Galbeed regions with average camel milk yields due to medium camel calving during the last *Gu* 2010 season. The FSNAU *Deyr* 2010/11 pastoral herd dynamics model indicates a decreasing trend in sheep, goat and cattle herd sizes since the *Gu* 2010 season, reaching borderline or below baseline levels in all pastoral and agropastoral livelihoods of the country. The largest decrease in sheep and goat herds is observed in the drought-affected regions of Hiran, Nugal and Central (Cowpea Belt and Coastal *Deeh*), following successive seasons of drought. Camel herds have also decreased slightly in the last *Deyr* season with the exception of Northwest, Juba, Bay and Bakool regions.

Livestock Prices and Pastoral Purchasing Power

Livestock prices have followed a normal seasonal declining trend in most markets, from June to September 2010, picking-up during Hajj season in October and November. However, the prices have fallen down significantly in December 2010 due to the drought effects as well as shrinking livestock export demand from the Gulf states after the end of Hajj season. By December 2010, local goat prices have decreased below their levels in the previous year (Dec. '09) in most markets. The most significant decline in the local goat prices (31%) was recorded in Juba regions due to low demand within the region, long distance to other markets, as well as the effects of drought for the same season. Similarly, Juba regions also experienced the largest decrease in cattle prices (47%) compared to other main cattle-rearing regions of the South, where cattle prices were 28-33 percent lower of their December 2009 levels. Reduced livestock and increased cereal prices (see Agriculture sector) led to a significant decrease in ToT between local goat and cereals (maize and sorghum) in main local cereal producing regions of Juba (57%), Sorghum Belt and Shabelle (44% each) compared to previous year (Dec. '09) levels. The ToT (local goat to rice) has also declined in Northeast (14%) and Central (5%) due to a decrease in livestock prices and increase in cereal (rice) prices (Figure 3).

Figure 3: Regional Trends in Terms of Trade, Cereal to Goat



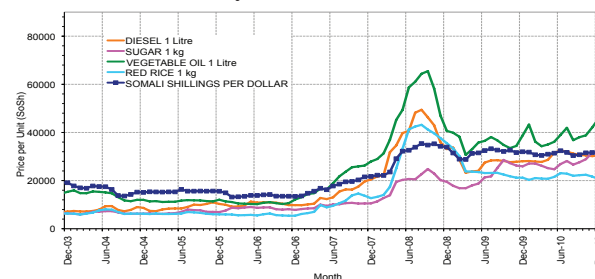
The volume of the total livestock exports in 2010 from Bossaso and Berbera ports is significantly higher (by 45%) than in 2009 due to the good *Gu* 2010 rainfall performance and access to Saudi Arabia markets following the lifting of Somali livestock import ban (Oct. 2009). Total livestock exports from both ports in 2010 are equivalent to 4,214,873 heads¹, including camel, cattle and sheep/goat. At the same time, Burao slaughter house carcass exports significantly reduced by 66 percent (from 58,440 to 20,077 carcasses) due to increased preference in live animal imports in the Gulf states.

MARKET

Exchange Rates

The Somali Shilling (SoSh) has remained relatively stable (1-2% change) since December 2009 up to the end of last year. The average exchange rate in December 2010 ranged from 30,943 to 31746 SoSh per US dollar (USD) in the main markets of Central, Northeast and South. Though the Shilling has strengthened since the peak inflation year of 2008, the currency value is approximately 100 percent lower compared to its pre-inflation levels (March 2007 as a reference) throughout the SoSh zones. On the other hand, the Somaliland Shilling (SLSH) has been strengthening against the USD since May 2010, to reach a record level of appreciation of 11 percent by December 2010 (5,687 per a dollar) from a year ago. The Somaliland authority intervention in the foreign exchange market (by controlling the amount of SLSH in circulation), increased livestock exports during the Hajj, as well as stabilizing political/economic environment are the main factors contributing to the SLSH appreciation. Compared to the December 5-year average (2005-2009), the value of the currency rose by 9 percent in December 2010.

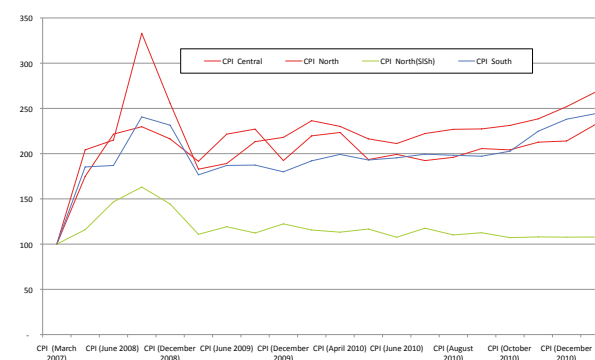
Figure 4: Shabelle Regions: Trend in Imported Commodity Price



Imported Commodity Prices

Prices of essential imported commodities such as wheat flour, vegetable oil, sugar and diesel showed an upward trend in the last two months (Dec. '10 and Jan. '11) in most regional markets (Figure 4). These increases reflect the food commodity price rise in the international export market on the back of poor weather that has adversely affected production of sugar, wheat flour and vegetable oil (maize) in 2010 in some of the main producing countries and the resurgent demand for oil in the international market. The price increases vary by regions depending on local taxes and transport costs according to distance of reference markets from main ports. By contrast, prices of rice have generally

Figure 5: Regional CPI Trends



¹ Berbera port figures do not include December 2010 export data

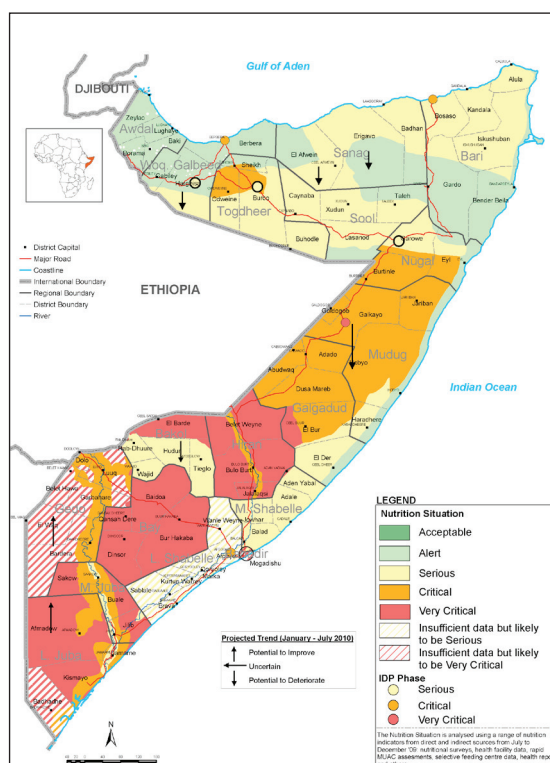
remained stable in the South and Northwest due to availability of relatively cheaper locally-produced cereals, while increasing moderately in rice-consuming regions of Northeast and Central, with less alternatives to access cheaper cereals.

Cost of Living for Urban Poor

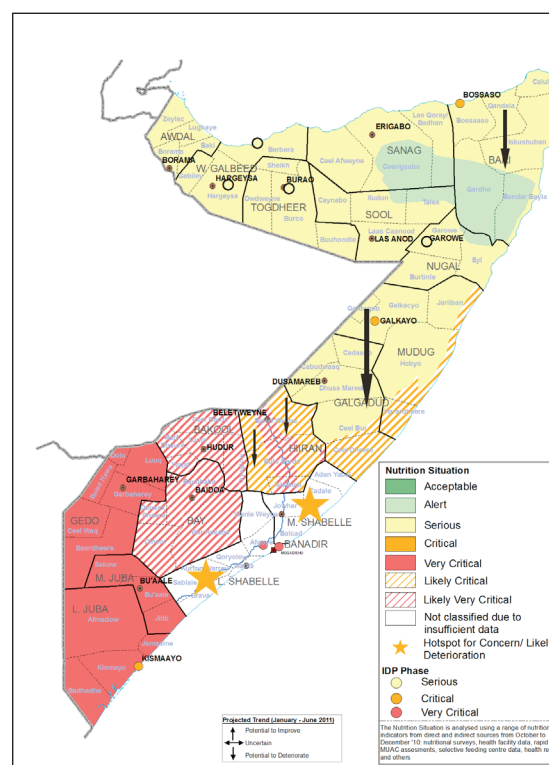
The Consumer Price Index (CPI) of the Minimum Basket exhibited mixed trend in all regions of the country over the last year. The inflation increased rapidly in the South (32%), Central (16%) and Northeast (11%), while decelerating moderately in Northwest (12%). The CPI trends are considerably influenced by food price dynamics, such as imported food commodities as well as red sorghum price increases (South -74% and Central - 56%) in SoSh areas. On the other hand, the slow-down in inflation in SiSh areas is largely attributable to the considerable decrease in the price of red sorghum (about 35%) due to high supply of locally produced cereals (white sorghum and maize). Since the base period of March 2007, however, the increase in the CPI of the CMB is equivalent to 85 - 152 percent in all SoSh areas, attributable to the after effects of the hyperinflation (2007-2008), and only 8 percent in SoSh areas (Figure 5).

NUTRITION

Map 6: Nutrition Situation Estimates, Post *Gu* 2010



Map 7: Nutrition Situation Estimates, Post *Deyr* 2010/11

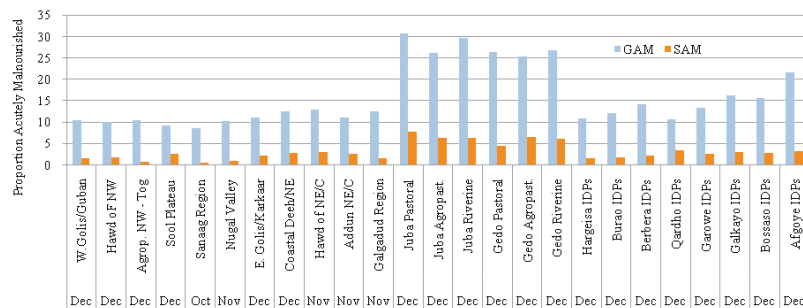


The FSNAU Post *Deyr* 2010/11 nutrition situation analysis depicts a deterioration in the nutrition situation across most population groups in Somalia from six months ago (Map 6 and 7). From October to December 2010, FSNAU and partners conducted a total of 24 representative nutrition surveys across Somali rural livelihoods and internally displaced population groups. Of these, 8 focused on updating the situation at livelihood or regional level in south central from six months ago, 8 focused on northwest and northeast rural livelihoods and 8 focused on IDP populations (Figure 6). Analysis of the findings indicates **a national level of acute malnutrition of 16 percent, with 4 percent severe malnutrition, which means: 1 in 7 children acutely malnourished and 1 in 25 severely malnourished.** This translates to approximately **241,000 acutely malnourished children, of whom, 57,000 are severely malnourished.** The total caseloads reflect a 7 percent increase from six months ago when 230,000 were estimated to be acutely malnourished (*Gu* 2010). With regard to severe acute malnutrition, there is a 31 percent increase.

However of great concern are the Southern regions, which are most affected by food insecurity and limited humanitarian interventions, where a regional median rate of 25 percent for global acute malnutrition (GAM) and 6 percent for severe acute (SAM) malnutrition is reported, translating to **1 in 4** children being acutely malnourished and **1 in 17 severely malnourished**. **The South hosts 75 percent, or 181,000, of all the acutely malnourished children and 80 percent, or 46,000, of all severely malnourished children.** Additionally, approximately 16 percent, or 60,000 of the pregnant and lactating women are at risk (MUAC < 23cm). The situation in the South highlights the nutritional vulnerability of the population that fall into crisis, even after one poor rainy season. Six months earlier, regional levels for the South were at 16 percent, indicating a significant deterioration.

Reduced access to milk, increasing cereal prices and reduced income levels are the key food security driving factors affecting the nutrition situation across the country. In the south, especially in the agropastoral and riverine communities, a high disease burden exacerbated by limited access to safe water and health care, with the increased stress of mothers to search for food and water also exacerbate the situation. Ongoing civil insecurity in all of the south also continues to hinder humanitarian access by international agencies, to meet the needs of the affected population.

Figure 6: Global Acute and Severe Acute Malnutrition Deyr 2010 (Oct - Dec) 2010 WHOGS <2WHZ & <3WHZ and /or oedema



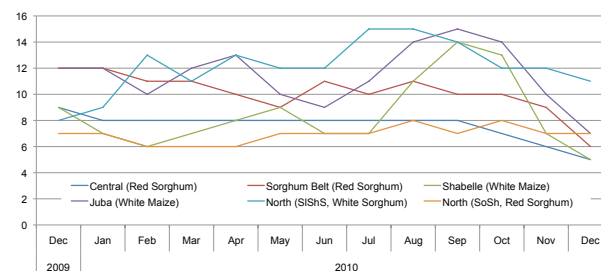
Detailed analysis of the nutritional situation by region and livelihood will be presented in the upcoming **Post Deyr 2010/11 Nutrition Technical Series**, due on February 24th, 2011.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The results of FSNAU's Post-Deyr pilot urban survey in SiSh areas (Northwest)¹ and rapid urban assessments² in SoSh areas (Dec '10 - Jan '11) as well as main market data analysis indicate deteriorating food security situation of the urban poor since Post-Gu 2010. The current estimates provide that 475,000 urban people are in crisis, which is a 53 percent increase from Post-Gu 2010. Out of the total urban population in crisis, 62 percent are in **AFLC** and 38 percent are in **HE**. While the urban crisis is widespread throughout the country, the majority of the population in crisis are found in the South (60%) followed by the North SoSh zone (29%) and Central (11%). The food security of the urban in the North SiSh zone remains relatively stable with Borderline Food Insecurity (**BFI**).

Figure 7: Trends in Zonal Terms of Trade (Labour to Cereal)



The deterioration in the urban food security is mostly attributed to the soaring food prices affecting the purchasing power of the market-dependant urban population. Shortfall in aggregate cereal supplies, as a result of crop failure in the main crop producing regions of southern Somalia, and increased farmer / harder hoarding of the available cereal stocks have led to a considerable surge in local cereal prices in South and Central (see Agriculture Sector) affecting the cost of living. For example, the cost of the minimum basket (CMB) increased by 13-19 percent in South and Central in the second half of 2010, also surpassing the CMB a year ago (Dec. '09) by 16-32 percent. However, the increase in the cost of living was not accompanied by equivalent increments in wage rates. In contrast, the wage rates have declined in July-December 2010 period in some urban areas of Central (17-38%), South (13-33%) and North SoSh areas (6%) undermining the urban poor's purchasing ability (Figure 15). The ToT between daily labour wage and sorghum, declined compared to June 2010 and December 2009 levels in the South (22-33% and 38-44%, respectively) and Central (38% and 44%). Conversely, the ToT remained stable in the Northeast due to stability of cereal prices, while in the Northwest it has shown a significant increase (114%) from a year ago (Dec. '09) in-line with locally-produced cereal price declines.

The current crisis in rural zones of South-Central and parts of the North with increased number of IDPs and destitute pastoralists moving into urban towns, meant limited access to social support, a vital safety net for the poor to fall back on during food security crisis. The persisting insecurity and tensions in the country are also adding pressure to the

¹ Hargeisa, Berbera, Gabiley, Borama, Zaylac

² 21 urban towns were assessed across the country in SoSh areas.

The nutrition situation among the urban poor in Somalia indicates a worrying situation as revealed in the post *Deyr* integrated analysis. Of great concern are the urban poor in the southern parts of Somalia with their nutrition situation classified as **Critical** to **Very Critical**. Given the desperate situation mainly resulting from the effects of poor *Deyr* rains such as low cereal and livestock production, increased cost of living and minimal access to sustainable livelihoods as well as the general civil insecurity especially in the South, the urban poor are amongst the most vulnerable groups. In the assessed towns in the Central, there was a mixed picture of **Alert** and **Serious** nutrition situations. Strikingly, in the Central the urban poor reported better dietary diversity compared to their counterparts in the South and this could have largely accounted for the ongoing humanitarian interventions in food, nutrition, water and sanitation and increased access to milk products during the assessment. In the Northwest and Northeast, a diverse picture was reported, with a **Critical** nutrition situation in Laasanod, Togwajale and Burao, **Very Critical** in Hargeisa and **Alert** to **Serious** in the rest of the towns.

The post *Deyr* 2010/11 livelihood based integrated food security analysis indicates an acute humanitarian crisis for one million rural people in Somalia, with 650,000 in **AFLC**, and 355,000 in **HE** (Map 8). The number of people in crisis increased since the post *Gu* 2010 by 28 percent primarily as a result of the effects of failed *Deyr* rains, which affected both farmers as well as pastoralists.

About 515,000 people in agropastoral and riverine livelihoods of South and Central, who suffered from *Deyr* 2010 harvest failure comprise the majority of rural population in crisis. However, a significant number of pastoralists (435,000) have also been affected by the severe water crisis, depleted pasture, reduced livestock assets and decreased livestock prices. By regions, Hiran has the largest number of the rural population in crises equivalent to 195,000. This comprises 75 percent of the region's total rural population, which is the highest density of rural population in crises among the regions of Somalia.

Defining Attributes of Crisis
Areas in Phase 3, 4, or 5
 Population in Phase (includes High Risk)
 >500,000 101,000-500,000 >500,000

Percent population in respective phase
 0% 100%

Criteria for Social Targeting
 a Unemployed system
 b Wealth group
 c Gender
 d Age
 e Education
 f Health
 g Other

Key Immediate Causes
 a Drought
 b Floods
 c Surplus
 d Civil Insecurity
 e Market Disruptions
 f Disease Outbreaks
 g Population Influx
 h Inflation
 i Other

Key Underlying Causes
 A Post-Slavery Conflict
 B Environmental Degradation
 C Social Marginalization

Recurrence of Crisis in Past 10 yrs
 Low (<2yrs), Moderate(3-4), High (>5)

Confidence Level of Analysis
 Low ** Medium *** High ****

Current or Imminent Phase
 1A Generally Food Secure
 1B Generally Food Secure
 2 Borderline Food Insecure
 3 Acute Food and Livelihood Crisis
 4 Humanitarian Emergency
 5 Famine/ humanitarian catastrophe

Risk of Worsening Phase
 1 Watch
 2 Moderate Risk
 3 High Risk
 4 Extreme Risk

Projected Trend
 1 Improving Situation
 2 No Change
 3 Deteriorating Situation

NOTES
 For sample indicators see <http://www.ethiopia.gov.et>
 Datasets: WFS-100, Data: 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026, 2027, 2028, 2029, 2030, 2031, 2032, 2033, 2034, 2035, 2036, 2037, 2038, 2039, 2040, 2041, 2042, 2043, 2044, 2045, 2046, 2047, 2048, 2049, 2050, 2051, 2052, 2053, 2054, 2055, 2056, 2057, 2058, 2059, 2060, 2061, 2062, 2063, 2064, 2065, 2066, 2067, 2068, 2069, 2070, 2071, 2072, 2073, 2074, 2075, 2076, 2077, 2078, 2079, 2080, 2081, 2082, 2083, 2084, 2085, 2086, 2087, 2088, 2089, 2090, 2091, 2092, 2093, 2094, 2095, 2096, 2097, 2098, 2099, 2100, 2101, 2102, 2103, 2104, 2105, 2106, 2107, 2108, 2109, 2110, 2111, 2112, 2113, 2114, 2115, 2116, 2117, 2118, 2119, 2120, 2121, 2122, 2123, 2124, 2125, 2126, 2127, 2128, 2129, 2130, 2131, 2132, 2133, 2134, 2135, 2136, 2137, 2138, 2139, 2140, 2141, 2142, 2143, 2144, 2145, 2146, 2147, 2148, 2149, 2150, 2151, 2152, 2153, 2154, 2155, 2156, 2157, 2158, 2159, 2160, 2161, 2162, 2163, 2164, 2165, 2166, 2167, 2168, 2169, 2170, 2171, 2172, 2173, 2174, 2175, 2176, 2177, 2178, 2179, 2180, 2181, 2182, 2183, 2184, 2185, 2186, 2187, 2188, 2189, 2190, 2191, 2192, 2193, 2194, 2195, 2196, 2197, 2198, 2199, 2200, 2201, 2202, 2203, 2204, 2205, 2206, 2207, 2208, 2209, 2210, 2211, 2212, 2213, 2214, 2215, 2216, 2217, 2218, 2219, 2220, 2221, 2222, 2223, 2224, 2225, 2226, 2227, 2228, 2229, 2230, 2231, 2232, 2233, 2234, 2235, 2236, 2237, 2238, 2239, 2240, 2241, 2242, 2243, 2244, 2245, 2246, 2247, 2248, 2249, 2250, 2251, 2252, 2253, 2254, 2255, 2256, 2257, 2258, 2259, 2260, 2261, 2262, 2263, 2264, 2265, 2266, 2267, 2268, 2269, 2270, 2271, 2272, 2273, 2274, 2275, 2276, 2277, 2278, 2279, 2280, 2281, 2282, 2283, 2284, 2285, 2286, 2287, 2288, 2289, 2290, 2291, 2292, 2293, 2294, 2295, 2296, 2297, 2298, 2299, 2300, 2301, 2302, 2303, 2304, 2305, 2306, 2307, 2308, 2309, 2310, 2311, 2312, 2313, 2314, 2315, 2316, 2317, 2318, 2319, 2320, 2321, 2322, 2323, 2324, 2325, 2326, 2327, 2328, 2329, 2330, 2331, 2332, 2333, 2334, 2335, 2336, 2337, 2338, 2339, 2340, 2341, 2342, 2343, 2344, 2345, 2346, 2347, 2348, 2349, 2350, 2351, 2352, 2353, 2354, 2355, 2356, 2357, 2358, 2359, 2360, 2361, 2362, 2363, 2364, 2365, 2366, 2367, 2368, 2369, 2370, 2371, 2372, 2373, 2374, 2375, 2376, 2377, 2378, 2379, 2380, 2381, 2382, 2383, 2384, 2385, 2386, 2387, 2388, 2389, 2390, 2391, 2392, 2393, 2394, 2395, 2396, 2397, 2398, 2399, 2400, 2401, 2402, 2403, 2404, 2405, 2406, 2407, 2408, 2409, 2410, 2411, 2412, 2413, 2414, 2415, 2416, 2417, 2418, 2419, 2420, 2421, 2422, 2423, 2424, 2425, 2426, 2427, 2428, 2429, 2430, 2431, 2432, 2433, 2434, 2435, 2436, 2437, 2438, 2439, 2440, 2441, 2442, 2443, 2444, 2445, 2446, 2447, 2448, 2449, 2450, 2451, 2452, 2453, 2454, 2455, 2456, 2457, 2458, 2459, 2460, 2461, 2462, 2463, 2464, 2465, 2466, 2467, 2468, 2469, 2470, 2471, 2472, 2473, 2474, 2475, 2476, 2477, 2478, 2479, 2480, 2481, 2482, 2483, 2484, 2485, 2486, 2487, 2488, 2489, 2490, 2491, 2492, 2493, 2494, 2495, 2496, 2497, 2498, 2499, 2500, 2501, 2502, 2503, 2504, 2505, 2506, 2507, 2508, 2509, 2510, 2511, 2512, 2513, 2514, 2515, 2516, 2517, 2518, 2519, 2520, 2521, 2522, 2523, 2524, 2525, 2526, 2527, 2528, 2529, 2530, 2531, 2532, 2533, 2534, 2535, 2536, 2537, 2538, 2539, 2540, 2541, 2542, 2543, 2544, 2545, 2546, 2547, 2548, 2549, 2550, 2551, 2552, 2553, 2554, 2555, 2556, 2557, 2558, 2559, 2560, 2561, 2562, 2563, 2564, 2565, 2566, 2567, 2568, 2569, 2570, 2571, 2572, 2573, 2574, 2575, 2576,

Gedo Region

After some improvements observed in the last *Gu* season, the food security situation has deteriorated in the *Deyr* 2010/11 both in agropastoral and pastoral livelihoods of Gedo region. Currently 50,000 people in the rural livelihoods of Gedo are estimated to be in crisis with 5,000 in **HE** and 45,000 in **AFLC** indicating 67 percent increase of people in crisis from the post *Gu* 2010. About 27,000 people of Dawa pastoral community are in **AFLC**, while 15,000 are estimated to be in crisis in agropastoral livelihoods (Southern Agropastoral and Bay-Bakool Agropastoral), with the majority (79%) being in **AFLC**. The early warning level of **Watch** is identified for agropastoral livelihoods. The food security situation in Gedo riverine indicated slight improvement since last *Gu* season where currently about 2,000 people are in **AFLC** with **Watch**. Southern Inland Pastoral is identified as **Borderline Food Insecure (BFI)**, with a **Moderate Risk** of deteriorating to **AFLC**. Furthermore, an estimated 25,000 urban people are in crisis (20,000 are in **AFLC** and 5,000 are in **HE**).



Riverine labour availability. Hamare, Dolow, Gedo, FSNAU, Dec. '10

The deterioration in the food security situation is attributable to a number of factors including crop production failure as a result of poor *Deyr* rainfall performance, increased cereal prices, livestock out-migration, reduced milk availability, limited milk and livestock sales; and declining purchasing power. The regional cereal production in this season is estimated only at 22 percent of the *Deyr* PWA (1,200MT of maize only) with the declines observed both in the riverine and agropastoral livelihoods. Low harvest meant also reduced agricultural activities, hence lack of labour opportunities for poor households.

The ToT between daily labour wage and cereals have declined significantly (33 – 57% decline) in most riverine and agropastoral areas, due to increased cereal prices following the harvest failure. However, some households in these livelihoods have cereal stocks (sorghum and maize) that could last in 3 – 4 months, due to the good harvest in the *Gu* 2010. Similarly, all pastoral livelihoods (Dawa and Southern Inland) are affected by poor *Deyr* rainfall, which resulted in deteriorated rangeland conditions and water scarcity. This has consequently affected the livestock body condition and production. Livestock herd size for cattle and sheep and goats have not recovered from previous drought seasons and are significantly below baseline levels (28-30% of the baseline), while camel herds are near or above the baseline level. Livestock owners are affected by low milk production, decreased livestock prices and deteriorating ToT. That is, the ToT between local quality goat and red sorghum in December 2010 has declined since the same month last year at various rates, from 20 to 70 percent, depending on the levels of sorghum price increases (30 – 100% increase) and livestock prices according to body condition.

The nutrition situation in Gedo region is **Very Critical** across all the livelihood zones, a deterioration from **Critical** in the pastoral and riverine areas, since the *Gu* 2010. In the agropastoral livelihoods, the situation is sustained. This is attributed to limited food access due to impact of drought on crop and livestock production; disrupted humanitarian activities affecting delivery of health and nutrition services; high morbidity and poor health seeking behaviours; limited access to safe water, sanitation & health facilities and poor infant and young child feeding. The mitigating factors include limited social support from the local community, increased charcoal burning for income to buy food (but with long-term negative impact on the environment) and sale of fodder among the riverine communities to generate income for food and non-food items.

Juba Regions

The food security and nutrition situation has continued to deteriorate in the Juba regions with more livelihoods falling into crisis. In addition to riverine areas, which remain in **HE** as for *Gu* 2010, the Southeast Pastoral, Southern Agropastoral and Lower Juba Agropastoral livelihoods are also identified in **AFLC** phase with **High Risk** of deterioration to **HE** in post-*Deyr* 2010/11. Currently, 125,000 rural population in both Juba regions are estimated to be in crisis, of which 60,000 are in **HE** and 65,000 in **AFLC**, with a slightly higher concentration in Lower Juba (65,000). In addition, 55,000 urban population are also identified in crisis, of which 25,000 in **HE** and 30,000 in **AFLC**. However, southern inland and coastal pastoral livelihoods are identified in **BFI** with **Watch**, as in post *Gu* 2010.

The deterioration in agropastoral and riverine areas is mostly attributable to the significant crop losses (sorghum and maize respectively) following the poor *Deyr* rainfall performance. The situation in the riverine areas is exacerbated by the fact that this is the second consecutive season of crop failure after *Gu* 2010 floods that caused significant decline in *Gu* cereal production. However, the households in riverine livelihoods have received good off-season harvest in September-October 2010. Therefore, there are still some stocks available among the households, particularly in Middle Juba region, while another season of off-season maize harvest is expected in March. The agropastoral areas have suffered a complete sorghum crop loss in *Deyr* 2010 after a bumper harvest during *Gu* 2010. Therefore, the sorghum stocks are also available in the agropastoral livelihood up to March this year.



Poor cattle body condition. Dashek Wamo, Afmadow, Lower Juba, FSNAU, Dec. '10

The deteriorating situation in cattle-rearing livelihood of Southeast Pastoral of Juba regions results from a combination of factors including rapid depletion of pasture and browse, severe water shortages, increased common animal diseases following early livestock migration to riverine areas, disruption of Garissa market affecting livestock sales, limited milk sales, high water and staple food prices and eroded purchasing power of poor pastoralists. A significant decrease in ToT between daily labour wages and cereals are observed in all affected livelihoods. Poor households in these areas cope through labour migration to charcoal production sites and main towns seeking social support from their relatives.

The nutrition situation in Juba has deteriorated to **Very Critical** levels across all the livelihood groups, from **Serious**, and likely **Critical** in the agropastoralists, and likely **Very Critical** in the riverine communities, six months ago. Global acute malnutrition rates are currently over 25% across all the livelihoods. The situation has been aggravated by limited food access due to the impact of drought on crop and livestock production; disruption of humanitarian services affecting delivery of food, health and nutrition services; high morbidity and poor health seeking behaviors; limited access to safe water, sanitation & health facilities and poor infant and young child feeding.

Bay and Bakool Regions

The overall food security situation in Bay and Bakool regions has deteriorated since post *Gu* 2010, as reflected by a 68 percent increase in the number of people in crisis. Currently an estimated 185,000 rural and urban people in the two regions are in crisis. The majority of the people (81%), or 150,000, are in **AFLC**, while 35,000 are in **HE**. About 90 percent of the rural population in crisis is concentrated in Bakool region- estimated at 95,000 (90,000 in **AFLC** and 5,000 in **HE**) and comprises mainly the agropastoralists (47,000 in Bakool Agropastoral and 35,000 in Bay-Bakool Agropastoral Low Potential), with a significantly less representation of pastoralists (Southern Inland Pastoral). The early warning level for **Watch** is identified for all rural livelihoods of Bakool. In addition, 30,000 of Bakool's urban populations are either in **AFLC** (5,000 people) or **HE** (25,000 people). In Bay region, most of the agropastoral communities remain in **BFI** as in post *Gu* 2010, with the exception of parts of Bay-Bakool agropastoral population of Baidoa and Bur Hakaba districts, which are at **High Risk** of deterioration to **AFLC** due to the failed crop production following the poor *Deyr* rainfall performance. The food security situation of urban people in Bay region deteriorated considerably due to increased cereal and imported commodity prices and limited space for the humanitarian agencies. An estimated 45,000 urban people in this region are in crisis (43,000 in **AFLC** and 2,000 in **HE**).

The food security situation in most livelihoods of Bay-Bakool regions has deteriorated since the *Gu* 2010 due to crop failure (10% and 8% of PWA in Bakool and Bay, respectively), poor pasture, browse and water conditions causing deterioration in livestock body conditions and decrease in livestock prices, limited milk sales, reduced social support and increased cereal prices.

The ToT between labour/cereal and goat/cereal indicated a decreasing trend, which negatively impacted the purchasing power of the poor and middle households. In Huddur, the ToT local quality goat/red sorghum decreased in December 2010 by 56 percent (from 79kgs/goat to 35kgs/goat) compared to December 2009, as a result of



Failed sorghum crop boodaan, Rabdhure, Bakool, FSNAU, Dec. '10

declined local quality goat price (22%) and increased sorghum price (78%) in the same period. In Baidoa, the ToT also pointed towards the same trend. Despite the unskilled labour competition as a result of labour migration from rural areas to the main towns, labour wage rates sustained stable. However, the ToT daily labour wage rate/sorghum decreased in both regions due to stable labour wage rates and increased sorghum price. Livestock herd sizes of all species are below baseline, as a result of the previous and current droughts with a further decreasing trend for sheep/goat since post *Gu* 2010 due to high off-take.

The nutrition situation across the pastoral and agropastoral livelihood zones in Bakool and Bay regions remains likely **Very Critical**, since the *Gu* season six months ago. This is attributed to poor access to food, and high morbidity levels in the area. The underlying factors associated with the nutrition situation are: deteriorated food security due to poor *Deyr* 2010 rain performance resulting in crop failure and weakened livestock body condition; increased levels of endemic/seasonal diseases especially, whooping cough, intestinal parasite and diarrhoea; reduced humanitarian interventions due to civil insecurity, and limited opportunities to access income. Poor knowledge, attitudes and practices on infant and young child feeding practices are also a risk factor.

Lower and Middle Shabelle

The food security situation has deteriorated in the Shabelle regions in the current season, following the effects of failed *Deyr* rains, particularly in Middle Shabelle. A total of 85,000 people in Middle Shabelle are estimated to be in crisis of whom 15,000 are in **HE** (5,000 from Central Agropastoral and 10,000 from Coastal *Deeh* Pastoral) with an early warning level of **Watch**. The remaining 70,000 (5,000 Central Agropastoral, 12,000 Coastal *Deeh*, 11,000 riverine and 42,000 Southern Agropastoral) people are identified in **AFLC** with an early warning level of **Watch**. Most livelihoods in Lower Shabelle are identified in **BFI** with **Moderate Risk** of deterioration to **AFLC** with the exception of Southern Agropastoral (Wanlaweyn district) where there is a **High Risk** of deterioration to **AFLC** (9000 people in **AFLC**). Similarly, the food security situation of the urban livelihoods of both regions has indicated a deterioration since the last *Gu* 2010. The total number of affected urban people in both regions is currently estimated at 92,000 people, with 39,000 in **AFLC** and 53,000 in **HE**.

Complete rainfall failure resulted in poor crop production (46% and 23% of PWA in Middle and Lower Shabelle, respectively) and increased cereal prices. However, cash crops including sesame, vegetables (cucumbers, lettuce, onions, tomatoes, peppers, etc.), fruits, cowpeas, banana, fodder, etc. which are practiced in the region enhanced the job opportunities for the poor and lower middle households. *Deyr* 2010/11 cash crop production from these regions is estimated at 7,700MT (3,800MT from Middle Shabelle and 3,900MT from Lower Shabelle). Additionally, more primary and secondary canals as well as roads in Lower Shabelle were rehabilitated, which provided more income earning options. The current cereal stocks (maize) in Shabelle riverine areas are estimated to last up to 10 – 12 months for middle and better-off households and possibly even longer in Lower Shabelle as shown by the analysis (see Agriculture Sector), due to the bumper *Gu* 2010 maize harvest. In contrast, poor agropastoralists in Wanlaweyn district of Lower Shabelle, which mainly depend on crop sales for their income, will not have sufficient carryover stock from previous season due to the complete *Deyr* sorghum failure and more expenses for water and fodder sales.



Good sesame. Goosarow, Qoryoley, Lower Shabelle, FSNAU, Dec. '10

Maize prices in the riverine livelihood increased by 57 percent from December 2009 to December 2010. The high increase of cereal prices and a slight decrease of daily labour wages, led to a significant decline in ToT between daily labour to cereal and goat to cereal in both regions. ToT labour to maize decreased by 40 percent (from 10 kg to 6kg/daily labour rate) in the riverine livelihood in December 2010 since a year ago. Meanwhile, ToT goat/sorghum has also decreased by 48 percent (from 141 to 73kg/goat). The decline is attributed to low livestock prices due to poor body condition of animals affected by long dry spell in the *Deyr* season and cereal price increase.

The nutrition situation in the agropastoral and riverine livelihood zones of Middle and Lower Shabelle regions has deteriorated to likely **Critical** phase from **Alert** (in Middle Shabelle) and likely **Serious** (Lower Shabelle) phases in the *Gu* 2010.

Limited access both to cereal and livestock products following the failed *Deyr* rains, reported outbreaks of diarrhea, malaria, measles and whooping cough, amidst limited access to health care services, are the key driving factors. The situation is aggravated by civil insecurity resulting in trade disruptions, displacements and limited humanitarian space for interventions. Nevertheless, there is limited but ongoing selective feeding programs, social support and income from sale of fodder and some labour opportunities among the riverine, which may have mitigated the nutrition situation. The nutritional situation of the Afgoye IDP, however is very concerning at 21percent GAM a deterioration from 15percent six months ago.

Hiran Region

The food security situation continues to deteriorate in the Hiran region, where all livelihoods are classified in **HE** with the Early Warning level of **Watch**. The post *Deyr* 2010/11 food security assessment results indicate that the number of rural people in crisis has increased by 8 percent since last *Gu* 2010 and currently stands at 195,000 people, representing 75 percent of the rural region's population. Approximately 67 percent of these people are in **HE** and the rest are in **AFLC**. The agropastoral livelihood is worst affected with 125,000 people in crisis, followed by riverine (30,000 people in crisis) and Southern Inland Pastoral (30,000 people in crisis). The situation has also deteriorated in urban areas, where currently 35,000 people are identified in crisis, of which 30,000 are in **HE** and 5,000 in **AFLC**.

The deteriorating situation is primarily attributable to another season of poor rainfall in *Deyr* 2010, which resulted in cereal crop failure and led to a considerable deterioration of pasture and browse conditions as well as acute water shortages. Subsequently, livestock body conditions deteriorated, resulting in decreased number of marketable animals, low kidding and calving rates, increased livestock out-migration and extremely low milk supply. Herd sizes of livestock owned by poor households have significantly reduced over consecutive seasons of droughts (camel 46%, cattle 33% and sheep/goats 64% of the baseline levels projected by June 2011).



Poor cattle body conditions in the agropastoral livelihood. Buloburte, Hiran, FSNAU, Dec. '10.

The reduced supply of domestic cereals following the harvest failure in the South, led to significant increase in cereal prices in the region, which in combination with poor income earning options and accumulated debts, continues to curtail abilities of both urban and rural households to buy food. The ToT between labour and cereal as well as local quality goat to cereal are drastically reduced, compared to December 2009, by 36% (from 11kg/daily to 7kg/daily labour) and 51% (from 95kg/goat to 47kg/goat), respectively. Levels of social support such as “*zakar*” are also reduced as a result of crop failure and reduced livestock herd size. Widespread civil insecurity and an increasing number of IDPs, mainly from Beletweyn town, have significantly affected rural communities in Hiran through increased competition for labour and social support, etc.

The nutrition situation remains likely **Very Critical** phase since the *Gu* 2010. Increasing numbers of IDPs in the region, very limited humanitarian space, deteriorating food security, outbreaks of diarrhoea and whooping cough reported in the region, with limited access to health centers and medical supplies in the area aggravating the situation.

Central

Central regions of Somalia continue to remain in **HE** for 7 consecutive seasons. Persisting drought has further deteriorated the food security situation in livelihoods of Coastal *Deeh*, Cowpea Belt and the eastern part of Addun. However, the situation has slightly improved in the Hawd Pastoral, which received moderate rainfall at the start of the *Deyr* season, while the *Gu* 2010 season performance was also exceptionally good in the livelihood. The improvement is also observed in the western parts of Addun, which benefited from better pastures of the adjacent Hawd livelihood, and also enjoy relatively stable security situation and better road accessibility. Currently, a total of 228,000 rural people are estimated to be in crisis, which is a 9 percent reduction from the numbers in *Gu* 2010. Most of the affected population (62%) is in **AFLC**, while number of people in **HE** has substantially increased since post *Gu* 2010, indicating a deepening crisis in Central. The situation has also significantly deteriorated in urban areas where number of people in crisis went up since post *Gu* 2010. However, most of the people in crisis are still from rural areas (82%), including destitute pastoralists (25,000 people). An early warning level of **Watch** was identified for the region up to the end of June 2011.

The food security situation in the eastern part of Addun, Coastal *Deeh* and Cowpea Belt livelihoods of central regions continued to deteriorate as a result of cumulative effects of several seasons of poor rainfall performance, increased livestock asset losses, reduced marketable animals, decreased milk production, high cereal prices and worsening civil security. In addition, the pastoralists in these livelihoods have experienced severe water shortages, which resulted in early water trucking and increased livestock migration, putting pressure on households' budgets to meet expensive water (63% increase since Dec '09) and migration costs. At the same time, household income from livestock and milk sales have declined due to lack of access, although the livestock prices are still favourable compared to same time last year (5% increase in local goat price from Dec '09). The worst situation is in Coastal *Deeh* and Cowpea Belt livelihood zones, where high livestock deaths have been reported due to lack of pasture and water and limited options for migration. The local cereal price increases (67% compared to Dec '09), as a result of cereal production failure in the South, affected purchasing power of both rural as well as urban populations. As a result, the amount of red sorghum that households can fetch in exchange to the daily labour rate or by selling a local quality goat is lower compared to last year (ToT decreases of 44% and 37% from Dec. '09, respectively). The ToT between local goat and more commonly consumed rice has also declined in the same period, but to a lesser extent (5%).



An infant with remaining livestock asset. Qosol-tire Village, Haradhere, Mudug, FSNAU, Dec. 2010

The nutrition situation has improved since the *Gu* 2010, from *Critical*, in the Hawd, and *Very Critical* levels in the Addun, to *Serious*. This is attributed to increased access to milk and milk products, following a good *Gu* 2010 in the Hawd, and parts of Addun livelihood zones; in addition to access to humanitarian assistance (health, good nutrition, WASH). Nevertheless, the improvements are projected to be short term, due to the current drought in the area. At the Coastal *Deeh*, the situation has deteriorated from *Serious*, and is likely *Critical*. A deteriorating food security situation, increased vulnerability as a result of insecurity and ongoing displacements, limited access to humanitarian support, limited milk access in the Coastal *Deeh* and Cowpea Belt; together with high morbidity, are the aggravating factors.

Northeast

The food security situation has deteriorated in most of the livelihood zones of the Northeast regions of Bari, Nugal and north Mudug, due to successive seasons of poor rainfall. The total population in crisis in Northeast regions have increased by 5 percent from last *Gu* 2010 and is estimated at 220,000 people, of which 190,000 (86%) are in **AFLC** and 30,000 (14%) are in **HE**. Most of the population in crisis, established at 130,000 is concentrated in rural areas, with which 9,000 are rural destitutes. In urban areas, 90,000 people are estimated to be in crisis. The most significant deterioration in the post *Deyr* 2010/11 is observed in the entire Coastal *Deeh* livelihood, where the number of people in crisis (HE and AFLC) has more than doubled. However, a slight improvement is observed in Hawd of Nugal region, which received moderate showers in October. Nevertheless, both Hawd and Addun pastoral livelihoods of Nugal, as well as Mudug regions still remain in **HE phase**. Nugal Valley, Karkaar/Dharoor Valley and Sool Plateau are classified in **BFI** with **High Risk** of deteriorating to **AFLC** in the post *Deyr* 2010/11. East Golis/Gagab livelihood zone of Bari region remains in **AFLC** with **Moderate Risk to HE**, as the area experienced a third seasonal rain failure, which significantly reduced frankincense production (the main income source of the population).



Poor sheep/goat body condition. Rebanti Village, Garowe, Nugal, FSNAU, Dec. '10

A combination of factors affected the food security situation in the Northeast in the post *Deyr* period, such as poor rangeland conditions and water shortages following the *Deyr* rain failure, leading to significant deterioration of livestock body condition, extreme reduction of milk production, high livestock off-take and reduced livestock assets at household level and increased water prices (80% increase in Nugal and north Mudug and 61% in Bari region, compared to Dec '09). In addition, the collapse of fishing activities due to increased sea piracy at off-shores have considerably affected Coastal *Deeh* livelihoods and significant livestock deaths, which drastically reduced livestock herd size from *Gu* 2010, pushing a significant number of population of this livelihood into crisis. FSNAU will undertake an in-depth study in the Coastal *Deeh* livelihood to get a better knowledge of survival strategies of the local people who lost a significant portion of their income and assets.

Prices of cereals have also increased since December 2009, by 18 percent for rice and 6 percent for red sorghum. Considerably lower increases in local cereal prices in the regions of Northeast compared to those in southern and central regions is likely attributable to relief interventions by various humanitarian agencies in Northeast. Cereal price increases have also affected the ToT of local quality goat to cereal (71kg/head), which has decreased by 14 percent compared to December 2009.

The nutrition situation in the regions of Northeast has improved to **Serious** levels, in the Golis and Hawd livelihood zones, and from **Critical**, and in the Addun from **Very Critical** in the *Gu* 2010. Nevertheless, a deterioration is projected in the Golis in the coming three months, based on seasonal livestock migration patterns. The situation in Sool Plateau remains in the **Alert** phase.

Northwest

The food security situation has improved in the agropastoral areas of the Northwest as a result of an exceptionally good *Gu/Karan* 2010 harvest as well as in some pastoral livelihoods such as Hawd of Hargeisa and west Golis-Guban, which experienced an average *Deyr* rainfall. Currently the total population in crisis in Northwest is estimated at 120,000 people, which is an increase of 60 percent of population in crisis since post *Gu* 2010. Out of the total population in crisis, an estimated 30,000 people are in **HE**, while 90,000 people are in **AFLC**. Slightly more than a half (54%) of the population in crisis are concentrated in rural areas. Sool Plateau is sustained in the **HE** phase due to the current effects of the drought. Pastoral livelihoods of Hawd, Nugal Valley and East Golis/Guban (Elafweyne and Erigavo districts) are in **BFI** with **High Risk** of deterioration to **AFLC**. East Golis of Lasqoray district (Sanaag) are identified in **AFLC** with **Moderate Risk** of deterioration to **HE**. All agropastoral areas are remaining in **BFI** as in the post *Gu* 2010.

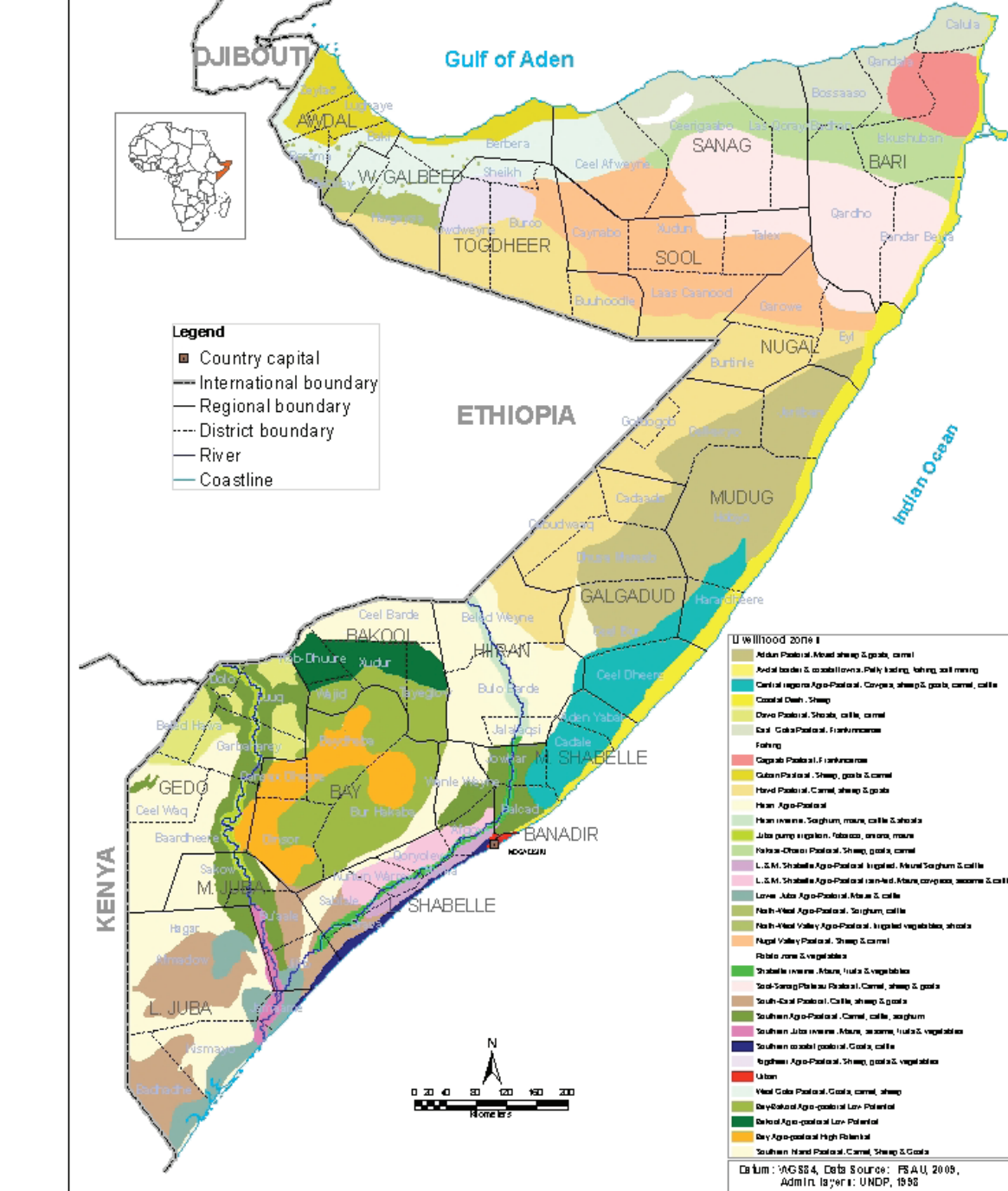


Early water trucking Hawd. FSNAU, Dec. '10

The food security situation in the pastoral areas of the Northwest indicates a mixed trend. Hawd of Togdheer and Sool regions, as well as Nugal valley, Sool Plateau and East Goils-Guban have deteriorated primarily as a result of the effects of failed *Deyr* rains, which adversely impacted pasture conditions and resulted in an acute water crisis and increased migration. Early water trucking has started in rain deficit livelihoods of Hawd, Nugal valley and Sool plateau and water prices have increased 150% from the normal (0.2 USD to 0.5USD/jerrycan of 20litres). The outlook is rather negative considering that during the long *Jilaal* dry season the livelihoods will continue purchases of highly priced trucked water and food and incur further expenses related to migration. These needs are likely to be met through increased livestock sales. Therefore, small ruminants are expected to decrease from the baseline levels in the coming months. More than a half of the herds in Sool Plateau comprise non-saleable young offspring of less than 6 months and, therefore, poor households are reportedly selling breeding animals. On the other hand, agropastoral livelihoods of Northwest and pastoral livelihoods of Hawd of Hargeisa and west Golis-Guban have improved due to good rainfall performance, which positively impacted crop, pasture, water and livestock conditions. Lambing/kidding rate of sheep/goats currently are high to medium in these areas and camel calving is expected to increase in the coming *Gu*. Local cereal price are 25-42% lower than last year (Dec '09) across the zone due to increased market availability of cereals following the bumper *Gu/Karan* cereal harvest collected in agropastoral livelihoods (72,000MT of cereals) as well as inflows from Ethiopia.

Local quality goat prices are higher in most regions compared to a year ago (Dec. '09), while local cereal prices are lower. Therefore, the purchasing power of populations has increased across all regions as indicated by ToT between local goat and sorghum. However, the ToT between local quality goat and rice indicates a mixed trend across the markets of the Northwest. The ToT has considerably increased in Burao and Borama due to increased goat prices and relatively stable rice prices compared to December 2009. Conversely, the ToT has decreased in Sanag region (24%) due to lower demand in goats which pushed the prices down and moderately increased rice price (18% in Erigavo market).

The nutrition situation in the northwest regions is in the **Serious** phase, apart from Sool Plateau livelihood zone, which is in **Alert**. Limited milk availability in the pastoral livelihood zones, high morbidity (with incidences of diarrhea following the water shortages in the area) are the key driving factors. Poor access to sanitation facilities and safe water in rural, coupled with inappropriate child feeding and care practices also contributed to the current situation. Nevertheless, increased humanitarian assistance in the region (health, feeding, water and sanitation), which include child health days conducted in the area in the months of December/ January 2011, mitigated the situation.



FSNAU Press Release, January 2011

FSNAU/FEWSNET Market Data Update, February 2011

FSN/II Technical Series Report Nutrition Situation Feb

FSMC Technical Series Report, Post Day 10/11 Analysis, February 2011 (1 of 1 incoming)

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