

This special FSNAU brief provides a summary of the key findings of the post *Deyr* '09/10 Assessment and Analysis, which are the result of fieldwork (December 23 – January 3), regional analysis workshop (January 4 - 8), national analysis workshop (January 11 – 16) and a technical verification and partner vetting meetings (Nutrition, January 25 and Food Security, January 27). FEWSNET Somalia along with 86 partners, including regional authorities, UN and international agencies and local and international NGOs participated and supported in this post *Deyr* '09/10 assessment and analysis process. FSNAU presented these results in Nairobi at a Somalia Support Secretariat Special Meeting on January 29th and issued a Press Release on February 1. The press release and presentation are available on the FSNAU website (www.fsnau.org).

Climate

Markets

Nutrition

Agriculture

Livestock

Civil Insecurity

Emerging Regional Issues

Integrated Food Security Analysis

KEY FINDINGS

The findings of the FSNAU, FEWSNET and partners post *Deyr* '09/10 seasonal assessment confirms that a widespread **Humanitarian Crisis** still persists in Somalia, with **42% of the population or estimated 3.2 million people in need of emergency humanitarian assistance and/or livelihood support until June**

2010. The results indicate that although there are some positive indicators in terms of the lifting of the livestock export ban and improved crop and livestock production in southern parts of the country, the food security and nutrition situation in central regions remains in crisis, where 70% of the population require assistance. The situation is exacerbated by escalating conflict and displacements, creating a double burden for drought affected populations in central regions, having to support those recently displaced yet with reduced access to assistance from aid agencies due to the insecurity.

Emergency levels of acute malnutrition continue to be reported, with **1 in 6 children in Somalia acutely malnourished** and in need of specialist care. Of these children, 1 in 22 is severely malnourished and at a 9 times increased risk of death compared to well-nourished children. However, in south and central Somalia the rates are higher, with 1 in 5 children acutely malnourished of which 1 in 20 is severely malnourished. These national rates of acute malnutrition continue to be amongst **the highest in the world**. Currently, these rates translate into estimated 240,000 children under 5 years of age in Somalia being acutely malnourished, of which 63,000 are severely malnourished. More than two thirds of these children are located in south and central Somalia, the area's most affected by the current conflict. The people currently in crisis include 1.25 million rural people affected by drought, 580,000 urban people who struggle with very high food and non-food prices, and 1.39 million internally displaced people (IDPs) who are fleeing from the conflict.

Sustained Humanitarian Emergency in Central and Hiran

The epicentre of the humanitarian crisis continues to be in Mudug, Galgadud and Hiran regions of south and central Somalia due to the ongoing drought and civil unrest, which has left 70% of the populations in those regions in **Crisis**. In these regions, livestock herds have been decimated due to 6 consecutive seasons of below average rainfall and destitute pastoralists are gathering in main villages and towns in search of assistance. In order for these populations to recover, a combination of expanded lifesaving and livelihood support is required urgently at scale. The Post *Deyr* '09/10 integrated nutrition analysis conducted by FSNAU and partners in central regions has indicated a sustained **Critical** nutrition situation in the Hawd and Addun pastoralists, with a risk of deterioration. The nutrition situation looks better for the Cowpea Belt agropastoralists (**Serious**) and the Coastal Deeh pastoralists (**Alert**). However, in Hiran the nutrition situation is **Very Critical** for the agropastoral and pastoral populations, while the riverine populations are in sustained **Critical** phase.

Internally Displaced People - the Largest Population Group in Crisis

Internally Displaced Populations (IDPs) continue to be the largest single population group in crisis, representing **43% of the total 3.2 million**, and with the ongoing conflict in the country this number is likely to continue to remain high and even increase further. Most of the IDPs, are concentrated in south and central Somalia. The nutritional status of IDPs is also of great concern, with even higher rates of chronic malnutrition reported compared to the host population, where 1 in 4 children are affected.

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Deepening Drought and Humanitarian Emergency in Parts of the North

Of particular concern are the populations in crisis in the north, the result of a drought following 4 seasons of below average rainfall. This has left 290,000 pastoral and agropastoral populations in crisis and in need of both life saving and livelihood support to recover. Sool Plateau of Sanaag region and Togdheer Agropastoral livelihood zones that were identified in *Acute Food and Livelihood Crisis (AFLC) with High Risk to Humanitarian Emergency (HE)* during *Gu '09* have deteriorated to **Humanitarian Emergency**. Fortunately, humanitarian access to these regions is good, therefore it is essential for agencies to extend the much needed life saving and/or livelihood support interventions to the population in these areas to prevent further deterioration.

Indications of Improvement in Food Security for the Urban Poor

The overall food security situation in urban areas has shown limited improvement, with a significant proportion of poor households continuing to struggle to meet their basic food needs. Humanitarian crisis for the urban poor persists in central regions as well as in parts of the North, while there are some indications of improvement in the Northwest and parts of the South. Currently 580,000 urban populations are in crisis. This is a slight decline from the figure of 655,000 in the Post *Gu '09*. Out of the total population in crisis, about 465,000 people are in **AFLC** and about 115,000 are in **HE**. Food access for these people is constrained by persisting inflation, high food prices, low income opportunities, the presence of large number of IDPs and shrinking humanitarian support in parts.

Good Crop Production and Improving Food Security in the South

There are good indications for agricultural areas in the South, where a positive harvest was received in this *Deyr*, which is 121% of the *Deyr* Post-War Average (1999 – 2008). The overall cereal production in southern Somalia is estimated to be the highest *Deyr* cereal harvest in the last seven *Deyr* seasons. Cash crop production is also significant and off-season cereal production is expected in March in Juba regions. Food access improved for most farmers in Bay, who received a bumper sorghum harvest this year, as well as for the farmers in Juba regions, Bakool Agropastoral and others. This has resulted in a reduction of the rural population in crisis by 15% from 6 months ago.

Table 1: Somalia Integrated Food Security Phase Classification, Population Numbers, January - June, 2010

Region	UNDP 2005 Total Population	UNDP 2005 Urban Population	UNDP 2005 Rural Population	Urban in Acute Food and Livelihood Crisis (AFLC) ²	Rural in Acute Food and Livelihood Crisis (AFLC) ²	Urban in Humanitarian Emergency (HE) ²	Rural Humanitarian Emergency (HE) ²	Total in AFLC and HE as % of Total population
North								
Awdal	305,455	110,942	194,513	5,000	20,000	0	0	8
Woqooyi Galbeed	700,345	490,432	209,913	0	30,000	0	0	4
Togdheer	402,295	123,402	278,893	50,000	75,000	0	5,000	32
Sanaag	270,367	56,079	214,288	25,000	60,000	5,000	20,000	41
Sool	150,277	39,134	111,143	15,000	35,000	5,000	5,000	40
Bari ³	367,638	179,633	202,737	80,000	0	25,000	0	29
Nugaal	145,341	54,749	75,860	25,000	25,000	0	15,000	45
Sub-total	2,341,718	1,054,371	1,287,347	200,000	245,000	35,000	45,000	22
Central								
Mudug	350,099	94,405	255,694	35,000	90,000	0	100,000	64
Galgaduud	330,057	58,977	271,080	20,000	65,000	10,000	155,000	76
Sub-total	680,156	153,382	526,774	55,000	155,000	10,000	255,000	70
South								
Hiraan	329,811	69,113	260,698	25,000	50,000	5,000	160,000	73
Shabelle Dhexe (Middle)	514,901	95,831	419,070	25,000	135,000	0	35,000	38
Shabelle Hoose (Lower)	850,651	172,714	677,937	35,000	15,000	10,000	0	7
Bakool	310,627	61,438	249,189	25,000	70,000	0	25,000	39
Bay	620,562	126,813	493,749	25,000	5,000	0	0	5
Gedo	328,378	81,302	247,076	30,000	40,000	0	20,000	27
Juba Dhexe (Middle)	238,877	54,739	184,138	5,000	0	0	0	2
Juba Hoose (Lower)	385,790	124,682	261,108	10,000	0	0	0	3
Sub-total	3,579,597	786,632	2,792,965	180,000	315,000	15,000	240,000	21
Banadir	901,183	901,183	-	30,000	-	55,000	-	9
Grand Total	7,502,654	2,895,568	4,607,086	465,000	715,000	115,000	540,000	24
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				580,000		8 ⁵		18%
Assessed Rural population in AFLC and HE				1,255,000		17 ⁵		39%
Estimated number of new IDPs-updated 1st Sept 2009 (UNHCR)				1,115,000 ⁴		15 ⁵		35%
Estimated number of protracted IDPs				275,000 ⁴		4 ⁵		8%
Estimated Rural, Urban and IDP population in crisis				3,225,000		43 ⁵		100.0%

(Endnotes)

1 Source: Population Estimates by Region/District, UNDP Somalia, August 1, 2005. FSAU does not round these population estimates as they are the official estimates provided by UNDP

2 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

3 Dan Gorayo is included within Bari Region following precedent set in population data prior to UNDP/WHO 2005

4 Source UN-OCHA/UNHCR: New IDP updated September 1, 2009 rounded to the nearest 5,000. Protracted IDP revised from UN-OCHA/UNHCR estimate (previously 400,000) following the new IDP movement which included protracted IDP (February 2008). Total IDP estimates are based on Population Movement Tracking data which is not designed to collect long-term cumulative IDP data

5 Percent of total population of Somalia estimated at 7,502,654 (UNDP/WHO 2005)

Defining Attributes of Crisis Areas in Phase 3, 4 or 5

Population in Phase (Includes High Risk)

0-999,000 101,000-500,000 >500,000

Percent of Total population in respective phase

Criteria for Social Targeting

I Livelihood system
II Wealth group
III Gender

Key Immediate Causes

a Drought
b Floods
c Tsunamis
d Civil Insecurity
e Market Disruptions
f Disease Outbreaks
g Population Influx
h Inflation
i Water Shortages

Key Underlying Causes

A Post State Conflict
B Environmental Degradation
C Social Marginalization

Recurrence of Crisis in Past 10 yrs

Low (1-2yrs) 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
Undefined Livelihoods Requiring Further Analysis

Risk of Worsening Phase

Watch
Moderate Risk
High Risk

Black lines indicate worsening shift in Phase
Coloured diagonal lines indicate magnitude only

Projected Trend

Improving Situation
No Change
Worsening Situation
Mixed Situation

Urban Populations in Humanitarian Emergency and Acute Food and Livelihood Crisis

Notes

1. Estimated populations do not include IDP and are rounded to the nearest 5,000
2. For category explanations see <http://www.fsna.org>

Region	Rural	Urban	IDP	Phase	Causes	Confidence
BORAMA	260,000	105,000	67,000	1, II, III	a, e, g, h, i	A, B, C
GALBEESA	170,000	30,000	51,000	1, II, III	a, d, e, f, g, h, i	A, B, C
BURAO	100,000	50,000	46,000	1, II, III	a, d, e, f, g, h, i	Mod/High
TOGDHEER	60,000	30,000	66,000	1, II, III	a, d, e, f, g, h, i	A, B, C
ERIGAD	40,000	130,000	34,000	1, II, III	a, d, e, g, h, i	A, B
GAROWE	410,000	65,000	219,000	1, II, III	a, d, e, g, h, i	A, B
BAIDOA	185,000	130,000	880,000	1, II, III	a, d, e, f, g, h, i	A, B, C
BAY	0	15,000	33,000	1, II, III	a, d, e, f, g, h, i	A, B, C
KISMAAYO	0	15,000	33,000	1, II, III	a, d, e, f, g, h, i	A, B, C

SECTOR HIGHLIGHTS

CLIMATE

The *Deyr* '09/10 season began in late September early October in most regions of Somalia, indicating a timely onset of the rainy season. However, the overall rainfall performance in terms of intensity, geographic coverage and distribution has varied across regions and livelihoods. Most of southern and parts of central Somalia received near normal to above normal rains, while most areas of Central, Northeast and Northwest received poor rainfall, with pockets of moderate rainfall (Map 2). In most of the regions of the North, initial *Deyr* rains were erratically distributed. Precipitation in Hawd of Togdheer, Hargeisa, upper Nugal valley, Sool plateau, Golis/Guban and agropastoral areas of Togdheer, Hargeisa and Borama, was also limited. Satellite based rainfall images show, and field reports confirm, that moderate rains were received in Hawd of Sool, parts of Nugal valley and Sool Plateau of Bari region. However, no rains were reported in Sool Plateau of Sanaag region (Map 3).

Deyr '09/10 season had a mixed performance in the drought-affected central regions of Galgadud, Mudug and Hiran. Normal to above normal, moderately intense rainfall of 125 -150mm was received in the Cowpea Belt, Southern Inland Pastoral of Hiran and Coastal *Deeh* of central regions. Comparison of actual (Oct-Dec. '09) and normal long-term mean (LTM) rainfall indicates 120-140% of normal rains in these areas. Rain gauge data from Bulo-Burti and Jalalaqsi districts recorded 333mm and 103mm of rains in Southern Inland Pastoral. However, extremely poor rains were observed in the Hawd and Addun livelihood zones and the agropastoral and riverine areas of Hiran region.

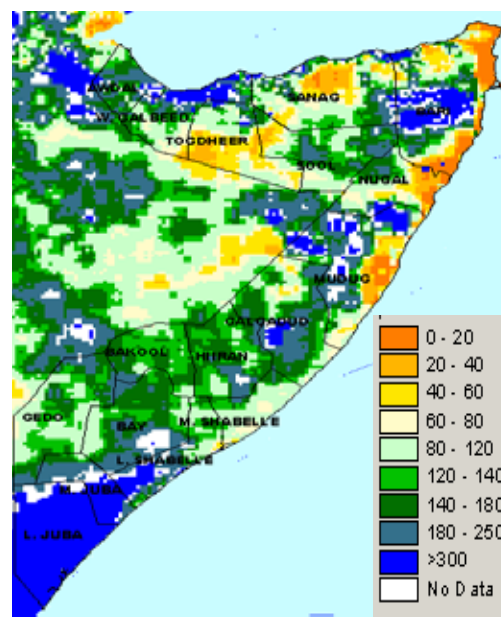
In the south, most pastoral and agropastoral zones of Bay, Shabelle, Juba, and parts of Bakool region, received well distributed, intense, normal to above normal rains. For instance, the rain gauge station located in Baidoa, Qansahdhare (Bay), and Tieglow (Bakool) recorded 396mm, 382mm and 151mm of rainfall, respectively. Conversely, light and sporadic rains fell in northern parts of Elberde (Bakool) and southern Garbaharey (Gedo), parts of agropastoral of Jowhar and Adan Yabal districts (Middle Shabelle) and the riverine area of Lower Shabelle region.

The El Niño rains have been mild or non-existent in Somalia compared to the massive flooding of 1997 and 1998. In contrary, only in parts of Hiran, Gedo, Shabelle and Juba regions were moderate flash floods reported following torrential rains during Oct–Nov. '09.

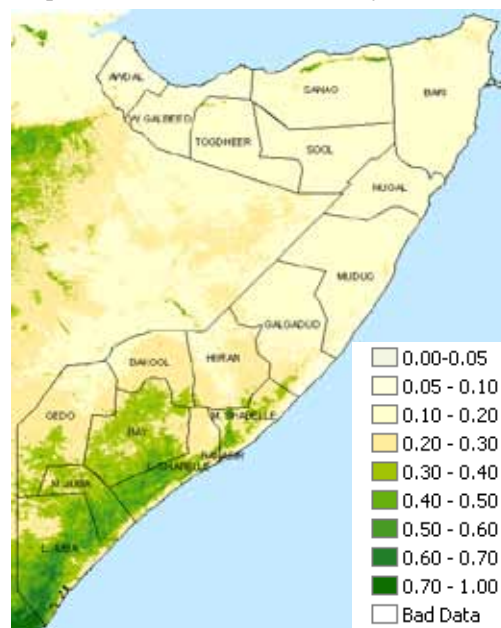
Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) for the last dekad of January shows extremely poor vegetation in key pastoral regions of the Northeast, Northwest, and Central (Figure 1). Poor *Deyr* '09 rains compounded by below normal rainfall in previous seasons, huge livestock in-migration into areas that received rainfall and an early *Jilaal* dry season have reduced the quality of any existing vegetation. Field reports indicate that Hawd of Sool region and parts of Sool Plateau in the Bari region show slightly better pasture conditions than the surrounding livelihoods in the North. In contrast, vegetation is good in parts of Central, especially in Southern Inland Pastoral livelihoods of Bulo-Burti and Jalalaqsi districts. Vegetation is also good in most parts of the South with the exception of the Southern Inland Pastoral livelihoods of Gedo, Bakool and Juba, and agropastoral and coastal areas of Shabelle.

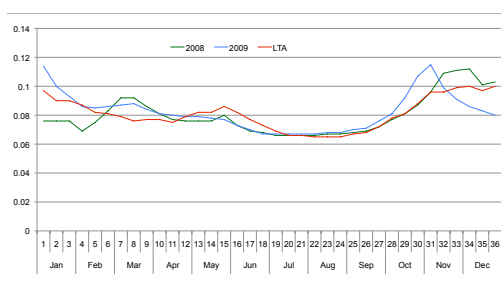
**Map 2. Percent of Normal Rainfall
October–December, 2009**



Map 3. NDVI 3rd Dekad of January, 2010



**Figure 1: Sanaag Region, Sool Plateau
Vegetation Conditions (NDVI Trend)**

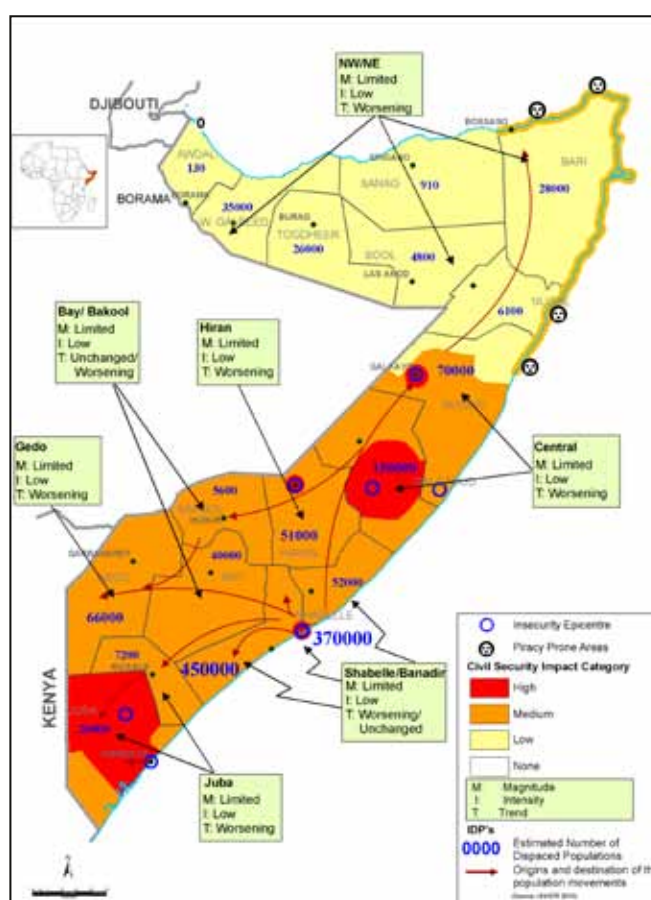


CIVIL INSECURITY

Violent conflict continued throughout 2009, and worsened further in the second half of the year, particularly in southern and central Somalia. At the same time, the number of security incidents has been increasing in parts of the northern regions where security levels had been relatively better. The conflict in Somalia have both direct and indirect impacts on the population, particularly urban populations, including human casualties, destruction of property, human displacement, disruption in trade and complete loss of livelihoods. The areas of high and moderate impact are highlighted in Map 4.

Mogadishu remains the epicentre of the chaos and violence in Somalia. Continuous confrontations between the Transitional Federal Government (TFG) and opposing groups generate frequent threats to the city's population causing human casualties, destruction of private and public property and massive population displacement. Beletweyne and Dhusamareeb are key hotspots, while tensions are also high in regions of Galgaduud, Hiran, Bakool, Gedo and Juba, where military activities and mobilizations have taken place over the last six months. Acts of violence, including suicide attacks and bombings targeting government officials were also observed in 2009 in the North, particularly in Garowe, Galkayo, Bosasso, Lasanod and Hargeisa. Internally displaced populations (IDPs) have fled from Bosasso, Garowe, and Galkayo because of growing resentment among the local population, who suspect IDP involvement in the recent conflicts.

Map 4: Somalia Insecurity Outcomes, December, 2009



Source: FSNAU, January, 2010

The escalation of political conflict in much of the country has overshadowed other types of conflict, thereby reducing the frequency of natural resource based and intra-clan conflicts in rural areas. For example, in October a community in Xarardheere district in Mudug was able to resolve a conflict over *berkad* construction in a communal area. However, tension persists in the pastoral zone between Hiran and Middle Shabelle, where displacement had occurred in the first half of the year, restricting livestock movements. Acts of sea piracy, which adds further complexity to the instability of the country, continues on coastlines of central and northern regions. According to UN-OCHA access reports, between July and Dec. '09, there were 60 attempts of ship hijacking, of which 45 were successful.

The insecure operating environment means that humanitarian agencies are unable to reach a large number of people in need. Over the last few months the presence of humanitarian actors has decreased because of killings, kidnappings, looting of property, and pressure from the local authorities, particularly in parts of the central and southern regions.

Population displacement remains the biggest outcome of the ongoing violence, hostilities and political tensions in the country. According to UNCHR's population movement tracking system, out of the nearly 172,000 people displaced between the beginning of Sep. '09 and the end of Jan. '10, roughly 83% were displaced on the grounds of insecurity. In Jan. '10 alone, over 77,000 people were displaced due to insecurity, which is 19% higher than the number displaced between Sep. and Dec. '09 due to insecurity (approximately 65,000). This jump in displacement is attributed to the intensification of conflicts in Galgaduud, Hiran and Mogadishu. Overall, about 1.3 million IDPs are believed to be currently displaced within the country and are in need of humanitarian support (UNHCR, Jan. '10).

While civil insecurity is a significant factor in the plight of the Somali livelihoods, security incidents and violence are likely to continue and may increase over the next six months. This ongoing violence will continue to cause human casualties, destruction of property, population displacement, trade disruptions and restricted movements of people and commodities. Restrictions and impediments to humanitarian interventions might further aggravate the humanitarian situation, particularly in the southern and central regions.

AGRICULTURE

Cereal Production

For this *Deyr '09/10* the overall cereal production in southern Somalia is very positive, the highest in the last seven *Deyr* seasons (Table 2). The production is 121% of the *Deyr* Post War Average (PWA 1999 – 2008) and 149% of the 5-year average (2004 – 2008) (Figure 2). In absolute terms, the estimated *Deyr '09/10* harvest for sorghum and maize is 124,700 MT, for rice it is 3,750MT and 1,700MT for off-season maize (Juba region). Sorghum has a 76% share (98,800 MT) of the total cereal production, while maize contributes 21% (25,900MT) and rice contributes just 3% (3,750 MT). This season, the sorghum harvest is considerably better than the maize production. *Deyr '09/10* sorghum harvest is 158% of the *Deyr* sorghum PWA, while maize production is estimated at 90% of the *Deyr* maize PWA. The below normal maize production is related to the differences in localized rainfall, which affected both sorghum and maize producing areas. In particular, the riverine maize producing districts in Lower Shabelle (Kurtunwarey, Qoryole and Marka) suffered from a long dry spell in November and December and a significant drop in river levels, which reduced the opportunity for irrigation.

Table 2: *Deyr '09/10* Cereal Production Estimates in Southern Somalia

Regions	Deyr 2009 Production in MT			Deyr 2009 as % of Deyr 2008	Deyr 2009 as % of Deyr PWA (1999-2008)	Deyr 2009 as % of 5 year average (2004-2008)
	Maize	Sorghum	Total Cereal			
Bakool	200	2,100	2,300	84%	108%	82%
Bay	2,500	69,800	72,300	329%	212%	207%
Gedo	1,100	3,500	4,600	207%	67%	64%
Hiran	400	1,500	1,900	43%	31%	37%
Juba Dhexe (Middle)	5,100	3,700	8,800	696%	219%	232%
Juba Hoose (Lower)	1,600	200	1,800	666%	152%	352%
Shabelle Dhexe (Middle)	7,100	3,300	10,400	190%	80%	144%
Shabelle Hoose (Lower)	7,900	14,700	22,600	179%	62%	99%
TOTAL	25,900	98,800	124,700	246%	121%	149%

The regional differences in rainfall are directly related to regional differences in production. Areas that are above long term trends in production are Middle Juba (219%), Bay (212%), Lower Juba (152%) and Bakool (108%), with the differences attributable to rainfall variance. Cereal production in Gedo (67%), Lower Shabelle (62%) and Middle Shabelle (80%) regions, is below normal, while in Hiran the failure of *Deyr* rains resulted in a harvest that was only 31% of the PWA. Bay region accounts for more than half (58%) of the total cereal production in southern Somalia, followed by Lower Shabelle (18%), Middle Shabelle (8%) and Middle Juba (7%). The share of Shabelle regions in the overall *Deyr* cereal production (27%) is considerably below the normal contribution of above 45% because of poor rainfall and low river levels.

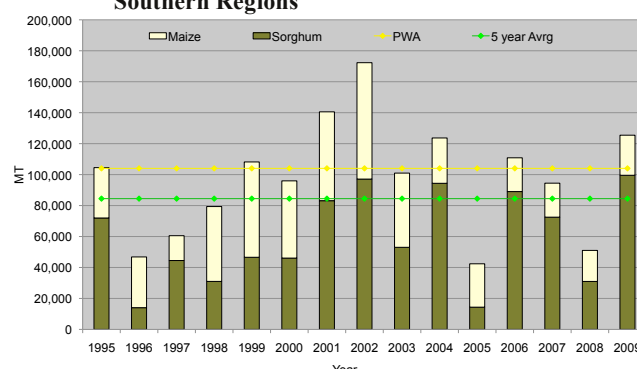
The first seasonal cereal production in the last six seasons was received in Cowpea Belt of Mudug and Galgaduud. The regions harvested approximately 700MT of sorghum (71% from Galgaduud) this season, following the average *Deyr* rains. In the northwest, *Gu/Karan '09* cereal production in the agropastoral regions of Awdal, Galbeed and Togdheer is estimated at 10,765MT, which is the lowest cereal production since 2004 (56% of the PWA). Of this harvest, 98% is sorghum (10,525MT) and 2% is maize (240MT).

The low production was caused by the poor and unevenly distributed rains. However, the production is higher than what was projected during the post *Gu '09* assessment because *Karan* rains resumed after the assessment, especially in Gebiley district where 85% of the harvest was collected.

Off-season Cereal Production

Above average *Deyr '09/10* rains provided an opportunity for off-season maize and cash crop production in Juba regions. The projected off-season crop establishment is equivalent to 5,450MT, two-thirds of which is expected in Lower Juba (1,300MT of maize and 1,800MT of sesame). FSNAU will conduct a post-harvest off-season crop assessment in March 2010.

Figure 2: *Deyr* Cereal Production (1995-2009) Southern Regions



Annual Cereal Production and Stocks

The *Deyr* season is a secondary agricultural season contributing about 30% to annual cereal production. *Deyr* '09/10 cereal production, together with rice and off-season maize, is estimated at 130,850MT, which constitutes about 46% of the total annual production. The 2009 annual cereal production for southern Somalia (*Gu* '09 and *Deyr* '09/10 combined) is 120% of PWA, 155% of the 5-year average, and is the third highest cereal production in the last 15 years (Figure 3). This is due to the above average cereal production in the main crop producing regions (*Gu* '09 was 102% of PWA, *Deyr* '09/10 121% of PWA).

Cereal availability analysis reveals that many households in Bay, Shabelle, Juba regions and some households (better-off and upper middle wealth groups) in Gedo, Bakool and the Cowpea Belt have some cereal stocks from *Gu* '09, *Gu* '09 off-season, the current seasonal production and *Deyr* '09/10 off-season, which could last up to 5–8 months. In Bay region, cereal stocks could last for more than eight months, due to near average *Gu* '08 (93% PWA), slightly above average harvest in *Gu* '09 (106% of PWA), followed by a bumper *Deyr* '09/10 crop harvest (212% of PWA).

Cash Crop Productions

Sesame, vegetables, fruits, groundnuts, banana, cucumbers, and grass fodder are some of the most common cash crops grown in riverine and agropastoral livelihoods of southern Somalia. *Deyr* '09/10 cash crop harvest, including off-season, is estimated at 43,200MT, which is 232% higher than the cash crop production estimates in *Gu* '09 (13,000MT) due to good *Deyr* seasonal performance. More than 20% of total cash crop production estimates are from Cowpea Belt livelihood, followed by Middle Juba (20%), Bay (18%) and Lower Shabelle (17%) regions. Sesame, which was produced in all southern regions except from Bakool and Hiran, accounts for 45% of the total cash-crop production. Cowpea has a 32% share in the total cash-crop production. Two-thirds of the total cowpea production came from central regions; 26% was collected in Bay and the rest came from other regions of Southern Somalia (Shabelles, Bakool, etc).

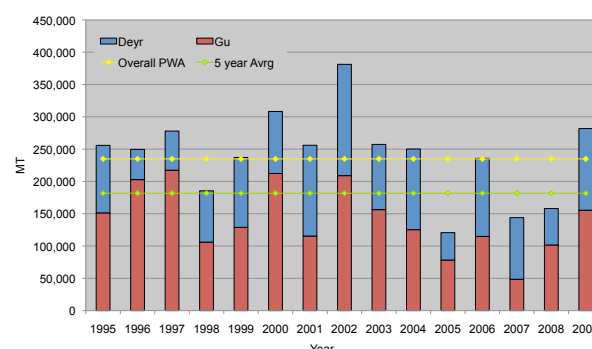
Local Cereal Prices and Terms of Trade

Prices of sorghum and maize have decreased by 10 – 30% between Dec '08 and Dec. '09 due to the improved cereal supply following good cereal production in the last two seasons. However, the prices are still above the 5-year average, which is attributable to increased demand for cheaper local cereals following hyperinflation in imported food prices. In the Shabelle and Juba regions, maize prices are 165% and 160% higher than the 5-year average (2003–2007), respectively. Similarly, the sorghum prices in Sorghum Belt are 195% higher than the 5-year average (Figure 4).



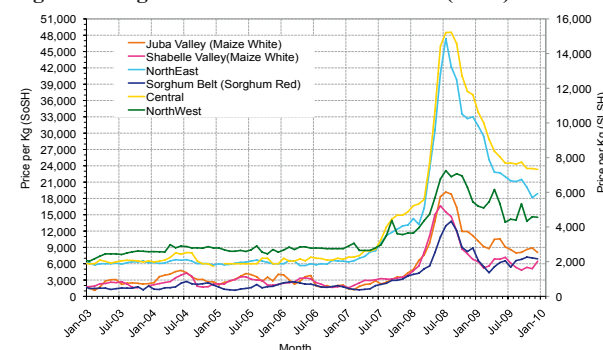
Good Sorghum Crop, Baidoa, Bay, December, 2009

Figure 3: Annual Cereal Production Trends (1995–2009)



Good Sesame Crop, Lama Daadka, Jalib, Middle Juba, December, 2009

Figure 4: Regional Trends in Cereal Prices (SoSh)



Maize prices vary among the markets of maize producing regions (Shabelle and Juba). The highest maize prices are recorded in Hagar (10,375SoSh/kg) and Dhobley (13,800SoSh/kg) in Lower Juba, while lowest prices, ranging from 4,500SoSh/kg – 6,500SoSh/kg, are in Qoryoley, Marka, Afgoi (Lower Shabelle), Jilib (Middle Juba), Jamame and Kismayo (Lower Juba). The highest prices are due to disruptions in market activities and restrictions of trade movements among the regions caused by civil insecurity, while low maize prices in Shabelle and Juba riverine are due to the improved cereal production in the last three consecutive seasons.

Sorghum prices also vary within the Sorghum Belt. The highest sorghum prices in Dec.'09 were noted in Luuq (Gedo), Hudur (Bakool) and Beletweyne (Hiran) markets, which were 243% (8,000SoSh/kg), 208% (7,500 SoSh/kg) and 90% (7,000 SoSh/kg) higher than the 5-year average, respectively. This is attributed to several consecutive seasons of poor cereal production, low cereal supplies and the increased demand on locally produced cereals, as well as inter-regional trade restrictions due to insecurity. In contrast, the lowest sorghum prices in Dec. '09, ranging between 4,300 – 5,500SoSh/kg, are recorded in Dinsor, Qansah Dheere (Bay) and Bardhere (Gedo), due to good cereal production. There are speculations that cereal prices may increase in the coming months due to the temporary suspension of food aid distribution, and the increasing number of traders from grain deficit regions reportedly placing direct orders with farmers.

The terms of trade (TOT) between cereal and labour showed a mixed trend in July – Dec.'09 (Figure 5). In Shabelle and Juba regions, the aggregated TOT (maize to labour) increased in most reference markets of southern Somalia, due to low cereal prices. For example, in the Shabelle regions, the TOT (maize/ labour) in Dec.'09 increased by 29% and 18% compared to July '09 and the 5-year average, respectively. In Juba regions, Dec.'09 TOT (maize/ labour) is 7% and 69% higher compared to July '09 and the 5-year average, respectively. In the Sorghum Belt, the TOT (sorghum/ labour) in Dec.'09 is 19% lower than July '09 and almost equivalent to the 5-year average.

Cereal Imports

The total cereals imported in 2009 is estimated at 565,290MT, which is 52% and 34% higher than the total 2008 cereal imports (372,027MT) and the 3-year average (422,061MT), respectively. Cereal imports also show a significant monthly fluctuation, with the highest import figures recorded in May, September and November '09, which is reflective of high demand in the pre-monsoon month of May, Ramadan (September) and Hajj (November). The overall increased commercial cereal imports in 2009 is linked to reduced sea piracy owing to multinational naval force efforts, as well as an overall decrease of global prices making imports less expensive (Figure 6).

Figure 5: Regional Trends in Terms of Trade: Cereal to Labour

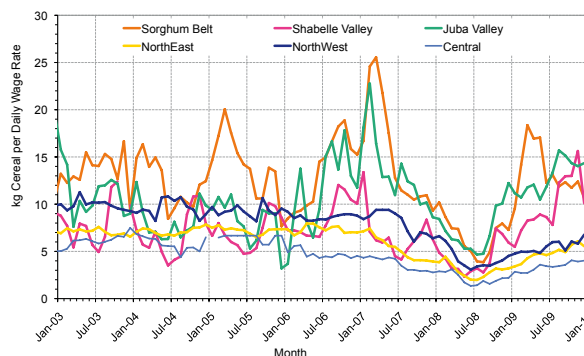
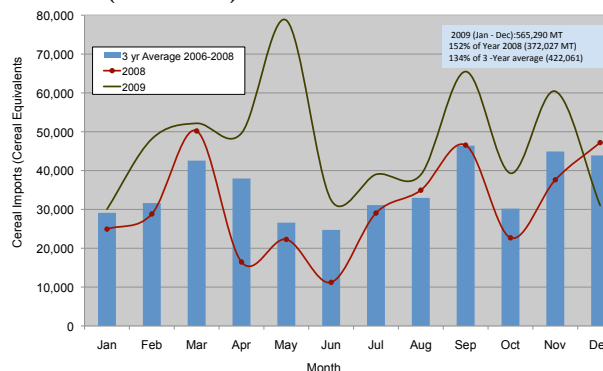


Figure 6: Commercial Cereal Import Trends (2005- 2009)



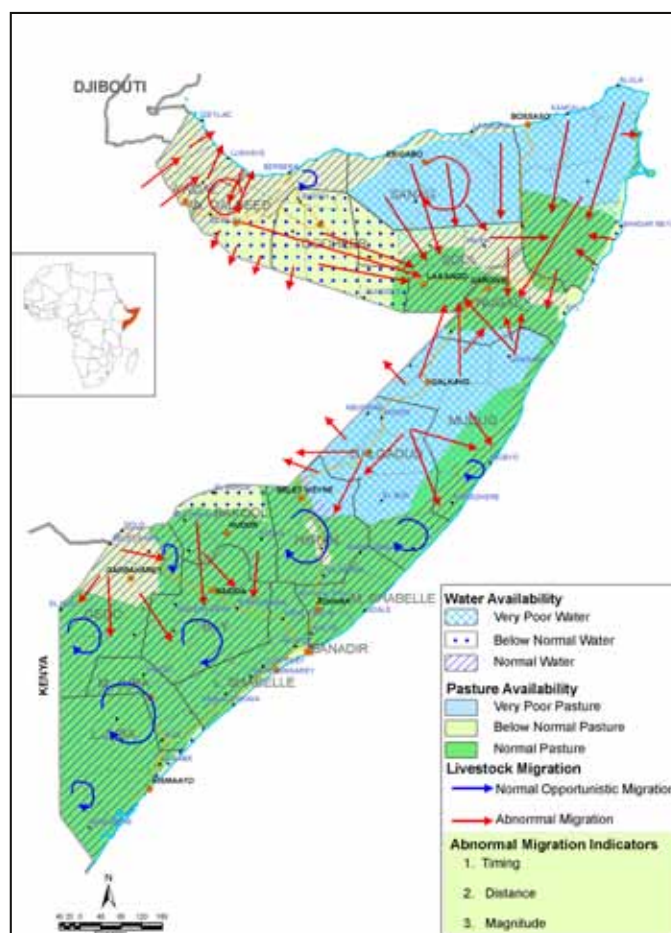
LIVESTOCK

Rangeland Conditions and Livestock Migration

Rangeland conditions in most key pastoral areas are poor to very poor due to largely below normal *Deyr* rainfall performance (Map 5). The sixth consecutive season of rain failure is recorded in Hawd and Addun pastoral livelihood zones of Hiran, Galgaduud and Mudug regions. In the north, three to four consecutive seasons of below normal rainfall in Sool Plateau of Sanaag region, as well as in pastoral and agropastoral areas in the Northwest, have resulted in below normal to poor pasture. However, normal to good rains were received in Sool Plateau of Bari region, Hawd pastoral of Nugal and Sool regions, lower Nugal Valley, the agropastoral and Coastal *Deeh* of central regions, which significantly improved both pasture and water availability. Conversely, pasture and browse areas in southern Somalia are normal to above normal, except for northern Bakool, northern Gedo, as well as parts of Hiran, parts of Coastal *Deeh* of Lower Shabelle and Lower Juba regions, where outmigration to neighboring livelihood zones in Somalia, as well as to Somali region of Ethiopia have been reported.

There are critical water shortages in most pastoral areas in the North, Central and Hiran. In the Hawd and Addun pastoral of central and Hiran regions, all *berkads*, water catchments and most shallow wells are dry. In *berkad* dependent pastoral areas of the North, water trucking is widespread. Due to the failure of *Hays* rainfall in the Golis/Guban pastoral of northern regions, water volume in streams and the shallow wells has greatly decreased and rangeland conditions have deteriorated.

Map 5: Somalia, Rangeland Conditions and Livestock Migration, December, 2009



Source: FSNAU, January, 2010

FSNAU has observed abnormal migration throughout most pastoral areas of northern and central Somalia. Water and pasture resources are quickly being depleted because of massive in-migration of livestock in the areas of Nugal, Bari and Sool regions that received normal to good rains. Due to these mounting pressures, stressed migration within the regions has been reported. Conversely, during the last six months, normal livestock migration has resumed in the South, apart from Hiran, Gedo and Bakool regions, where localized abnormal migration is still observed.

Livestock Body Conditions and Herd Dynamics

Deterioration of pasture and water conditions resulted in poor to very poor livestock body conditions in the drought-stricken livelihoods of Galgaduud, Mudug, Hiran and Sanaag regions and the rain deficit areas of northern Sool, northern Bari, Togdheer, Awdal, W. Galbeed and northern Bakool. There was extremely low camel and cattle conception during the past five to six seasons and almost no calving in most of the drought-affected regions. Similarly, the lambing and kidding rate is none to low in central regions of Galgaduud, Mudug, Sanaag and Hiran, but medium to low in the rain-deficit areas of northern Sool, northern Bari, Togdheer, Awdal, W. Galbeed and northern Bakool. In contrast, due to the overall improved pasture and water conditions, livestock body conditions are average to good in Sool Plateau of Bari, Hawd of Nugal and Sool, lower Nugaal Valley, Lower Shabelle, Middle Shabelle, Bay, southern Gedo, southern Bakool and Juba regions. In these areas, camel calving rates are medium, with medium conception rates in *Deyr* '09/10. Cattle calving is low to none in Juba, Middle Shabelle and Gedo, due to the high conception rate in *Hagaa* '09, but medium in Bay, Bakool and Lower Shabelle. In Juba, Bay and Lower Shabelle regions, lambing and kidding rates are medium, while in Gedo and Middle Shabelle, lambing and kidding are low with medium to high conception rates.

The FSNAU *Deyr* '09/10 pastoral herd dynamics model indicates a continued decreasing trend in herd sizes in all pastoral and agropastoral livelihoods in Hiran, central and northern regions compared to the end of *Gu* '09 season. The worst decline in camel, sheep and goat herds is observed in the drought-affected areas of Sanaag in the North as well as Central regions of Mudug, Galgaduud and Hiran, which experienced four and six consecutive seasonal failures, respectively.

Since June '09, camel, sheep and goat herds are also declining in most pastoral and agropastoral areas of northern regions, but at a lower rate than in central Somalia. Cattle and sheep are especially susceptible to drought conditions because of their reliance on grass pasture. Thus, livestock holders prefer to increase cattle and sheep offtake to preserve other asset holdings, like camels, in the face of high water trucking costs and food prices.

In contrast, most pastoral livelihoods in the South show an increasing trend in herd size reaching borderline or slightly above baseline levels. In the Southern Inland Pastoral and Dawa Pastoral of Gedo, Juba, Bay and Bakool, as well as West Golis/Guban of W. Galbeed in the Northwest, camel populations are slightly above baseline levels. However, sheep and goat holdings are significantly below baseline levels in all areas except for Juba. Among all pastoral livelihoods, Sool Plateau, Hawd and Addun have the lowest camel and sheep/goat herds. Cattle holdings have decreased to significantly below baseline levels in central regions, Hiran, Bakool and Gedo. No outbreaks of major livestock diseases were reported. However, increased drought related diseases are observed in the drought-affected and rain deficit regions.

Livestock Prices and Pastoral Purchasing Power

Prices of sheep and goats have steadily increased throughout Somalia since July '09 (Figure 7). Similarly, camel prices in the Northeast, Juba and Sorghum Belt have also increased but declined in the Northwest, Shabelle and central regions although still significantly higher than the 5-year average (2003-2007). Likewise, local quality cattle prices have increased in the last six months in Sorghum Belt (5%) and Juba (55%) but remained unchanged in Shabelle regions (Figure 8). Current livestock prices are significantly higher than the 5-year average, by 63% in Sorghum Belt, 243% in Shabelle and 154% in Juba. High livestock prices are due to the persisting hyper-inflation pressure following the devaluation of the Somali Shilling in 2008. Other local factors that contributed to price increases include more demand for livestock during Hajj and Ramadan and due to the lifting of a livestock ban by Saudi Arabia (late Oct. '09), as well as a reduction of marketable animals in the drought-affected and rain deficit pastoral areas. For example, average Dec. '09 prices for export quality goats in Northeast, Northwest and Central are higher when compared to Dec. '08 by 8%, 40% and 2%, respectively.

Increased livestock prices and reduced cereal prices translate into improved purchasing power of pastoral households in all regions (Figure 9), with the exception of Sorghum Belt where cereal prices increased significantly. In the last six months, the largest increase (46%) in the terms of trade for local goat to cereal (maize) was recorded in Juba regions. The largest increase in TOT (59% - 90%) for the past year was observed in Northwest, Central and Northeast.

Livestock Exports

Normal to above normal *Deyr* rainfall in the northeastern province of Kenya has revived cross border cattle trade in southern Somalia. Pasture conditions and water availability along the cattle trekking routes have improved, and demand at the Garissa cattle market remains constant. The volume of livestock exports through Berbera and Bossaso ports in 2009 (2,906,384 heads) is 9% higher than in 2008 and exceeds the 5-year average (2004 – 2008) by 4%. Household access to export quality goats, however, is limited in the drought-affected regions of Galgaduud, Mudug, Sanaag and Hiran.

Out of five abattoirs in the country only three (Galkacyo, Beletweyne and Burao) were operating in the past eight to ten months. The Beletweyne abattoir was closed in Sept. '09 after exporting 28,021 carcasses, because of security incidents. Similarly, the Burao abattoir closed because of limited demand from the Gulf States with no export recorded in the last three months. From Jan. to Dec. '09, carcass exports from Galkacyo (41,387) and Burao (58,440) have declined by 47% and 61%, respectively, compared to the same period last year. This decrease is attributable to increased competition over Gulf markets, low demand, and lack of good quality animals.

Figure 7: Regional Trends in Local Quality Goat Prices (SoSh/SiSh)

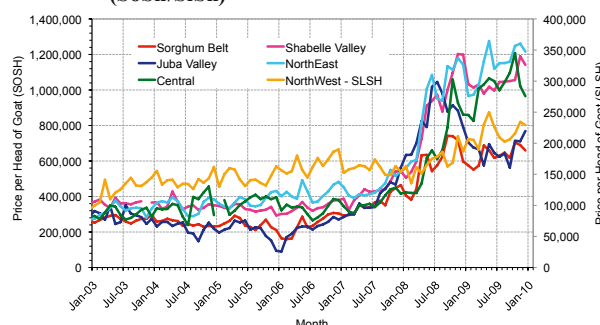


Figure 8: Regional Trends in Local Quality Cattle Prices (SoSh/SiSh)

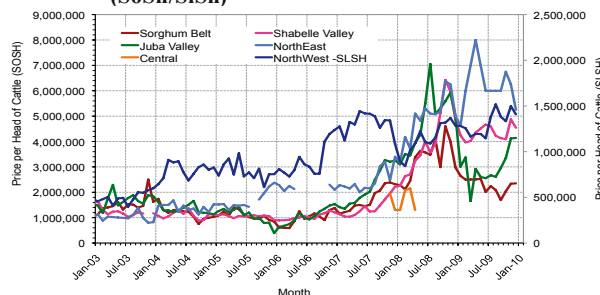
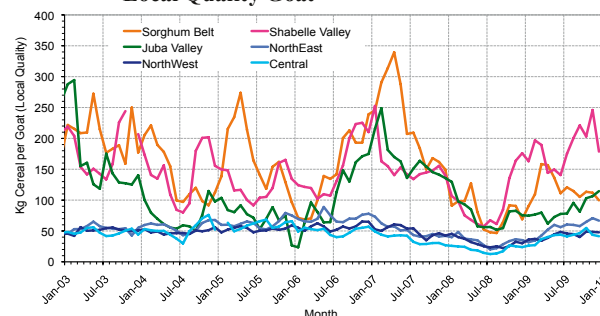


Figure 9: Regional Trends in Terms of Trade, Cereal to Local Quality Goat



MARKET

Exchange Rates

The Somali Shilling (SoSh) as well as Somaliland Shilling (SiSh) have strengthened against the U.S. dollar (USD) from July '09 to Dec. '09 and continue to appreciate in most markets. This strengthening is attributable to increased livestock exports during Hajj, the injection of the piracy income in the local economy, as well as the decreased demand for the dollar, as a result of the slowdown of business in the main market, Bakaara, in Mogadishu. The current value of the SoSh is 5-8% higher compared to its value in Dec. '08. However, the depreciation of the SoSh is still high compared to the 5-year average (2003-2007), ranging between 75 to 90% across most markets of southern Somalia (Figure 10).

Similarly, from July to Dec. '09, the Somaliland Shilling (SiSh) has gained about 11% in value against the USD. For example, the exchange rate in Dec. '09 at Hargeisa market was about 6,400 SiSh/USD versus 6,950 SiSh/USD in July '09. The value of the SiSh in the same market by the end of 2009 was the same as at the start of the year and was closer (6 units lower) than the 5-year average (2003-2007).

Imported Commodity Prices

The supply of imported commodities has increased since July '09 because of the end of monsoon season and consequent increase in traffic to the ports. As a result of increased supply, the prices of major import commodities, including red rice, sugar, vegetable oil and fuel, remained relatively stable or decreased slightly in most markets of the Somali Shilling areas. However, the opposite effect was observed in Somaliland Shilling areas, the vegetable oil prices increased by 18%, while prices of sugar (7%), petrol (4%) and rice (15%) declined between Sep. - Dec. '09. These price declines came after moderate price increases between July and Sept. '09, especially for sugar and rice. Nevertheless, the prices of all commodities are higher than the December 5-year average (2003-2007), both in SoSh (107 - 235%) as well as SiSh areas (20-80%), where rice price showed the highest percent increase (Figure 11).

Compared to the international rice price, the retail rice price in Mogadishu has the lowest price differential in 2009, equivalent to about 0.52 Kg/USD in Dec. '09. This is attributed to the reduced cost of shipping because of declining petrol prices and other favorable macroeconomic factors. The retail rice price in the relatively stable area of Bosasso market is closer to the international price (Figure 12).

Cost of Living for Urban Poor

The Consumer Price Index (CPI) estimated for the commodities in the Minimum Expenditure Basket (MEB) declined in all regions from July to Dec. '09, except in central regions, where it showed a 31% increase (Figure 13). The increase in the CPI in the central regions is mainly attributed to increases in the prices of cereals (23% for sorghum and 3% for wheat flour), as well as sugar (21%) and vegetable oil (15%), which together comprise 50% of the minimum food basket cost. Conversely, the relative decrease of cereal prices in the markets of Northeast (about 10%) is reflected in a larger short-term CPI decline. Compared to the same period last year, the CPI declined by 5-58% in all areas, indicating a reduced inflationary impact. However, since the base period of March '07, the increase in the CPI for the MEB is equivalent to 73 - 140% in all Somali Shilling areas and 9% in Somaliland Shilling areas.

Figure 10: Trends in Exchange Rates - SoSh and SiSh to USD

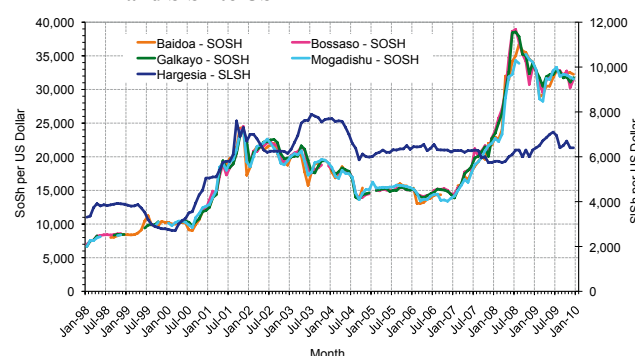


Figure 11: Northwest Trend in Imported Commodity Prices Compared to Exchange Rate

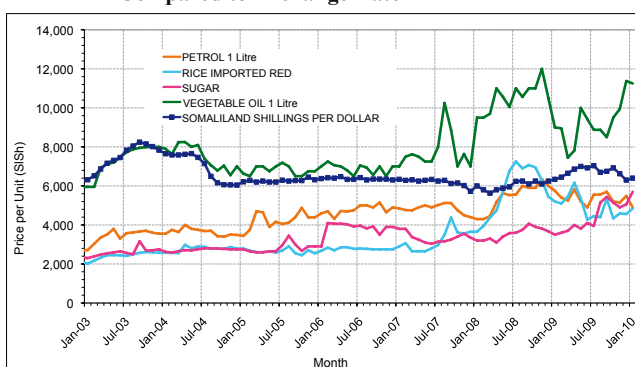
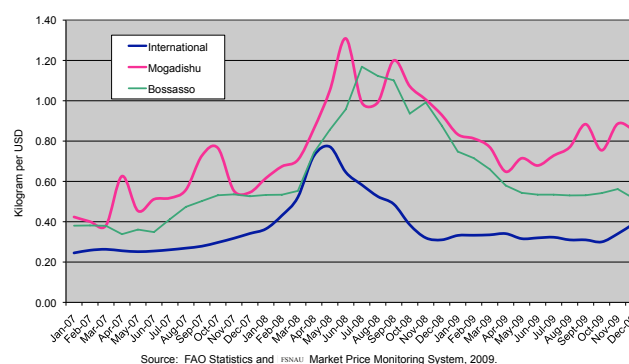
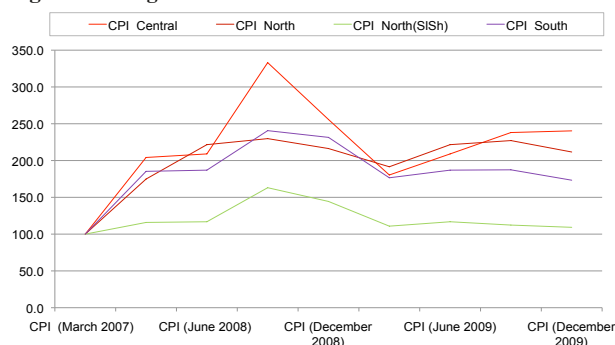


Figure 12: Comparison of Rice Prices: International (Bangkok FOB), Mogadishu and Bosasso



Source: FAO Statistics and FSNAU Market Price Monitoring System, 2009.

Figure 13: Regional CPI Trends



As mentioned earlier, the highest levels of acute malnutrition are reported in South Central at 19% GAM and 4.5% SAM compared to the national rate of 16% GAM and 4.2% SAM. Further, the very high **stunting of 22 % in the South and Central regions, unchanged from 6 months yet compared to the 14% and 11% reported in the northwest and northeast respectively**, continues to illustrate the chronic nature of this crisis. Currently with the reducing humanitarian space, access to nutritional rehabilitation services is also a limiting factor to recovery and the nutrition situation here remains in crisis with a poor outlook for the coming months.

Northern regions

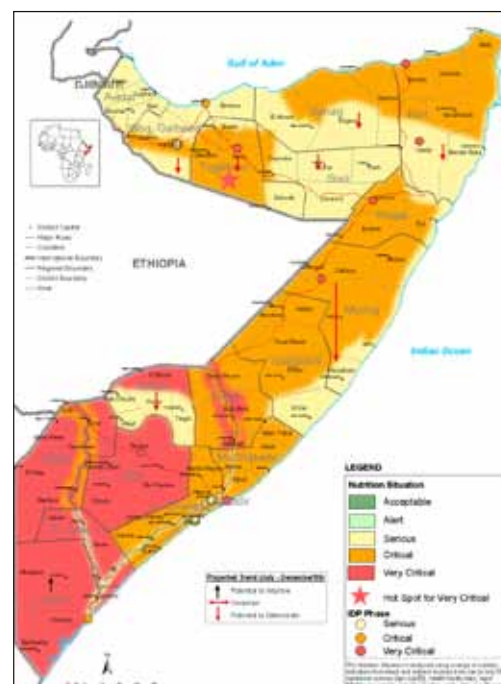
In the northwest regions, there is a mixed picture with notable recovery to **Alert** from the previous *Serious* situation in the western Golis Guban, Northwest Agropastoralists and Sool Plateau of Sanag as a result of in migration of livestock and the subsequent increased access to milk. Humanitarian support has also improved since July 2009. Similar conditions are experienced in the Hawd of Togdheer pastoralists, with the nutrition situation having improved to *Serious* from **Critical**. The Togdheer agro-pastoralists remain in a **Critical** nutrition phase mainly due to persistent poor access to water and food insecurity due to 4 season of crop failure. Given the population density, even without *Very Critical* rates of acute malnutrition, 13% of all acutely malnourished Somali children reside in the northwest, therefore integrated efforts to meet their needs are key. In the northeast regions, analysis of the nutrition situation is also providing a mixed picture, though with general improvement from 6 months ago. **Serious** rates of acute malnutrition are now being reported in East Golis, Guban & Karkaar and Nugal Valley, from **Critical** in July 2009; while **Alert** rates are reported in Sool Plateau, from *Serious* in July 2009. The sustained **Critical** rates in the Hawd and Addun highlight the concerning nutrition situation in the northeast and the elevated needs. It is estimated that 3% (excluding the IDPs in the region, also at 3%) of all acutely malnourished children in Somalia reside in the northeast regions.

IDPs

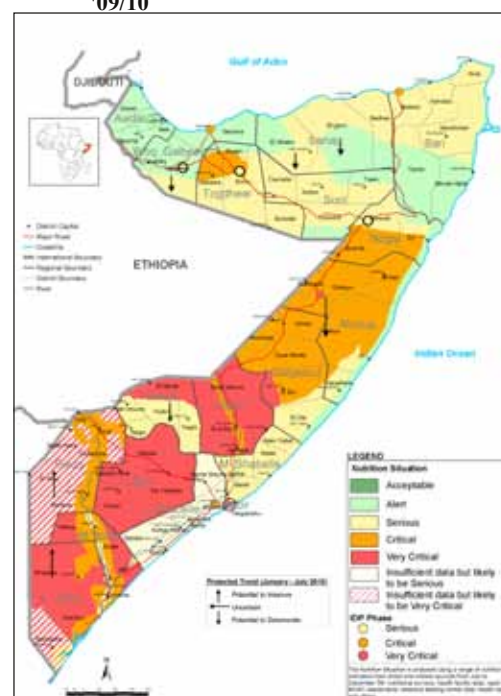
The IDPs continue to be a nutritionally vulnerable group, even in areas of relative peace and improved access in the northern regions. The **median GAM rate at 16.7% and SAM rate of 5.0%** are slightly higher than the national rates of 16.0% and SAM rate of 4.2%. However the median rates of global acute malnutrition in the IDPs have shown some improvement from the 20% GAM reported during the *Gu* '09. This is mostly due to improvement in the situation in Bossaso, where, although rates are still unacceptable high at 17.4%, this is the first year in the last 6 years, that levels below 20% are reported. Stunting, however, is continuing to be a specific concern, where, compared to the national rate of 20% in the IDPS the rate is 25%, meaning 1 in 4 children not being able to reach their full developmental potential. The window of opportunity for reversal of stunting is up to 2 years, so efforts focused on integrated health and nutrition programmes are key for these children. Of note also is the situation in the Afgoye IDPs, where a slight deterioration has been reported, with recent surveys reporting a GAM rate of 15.9% and SAM rate of 5.5%, up from 11.7% and 3.5% reported in the *Gu*. Galkahyo also is of great concern with **Very Critical** rates of GAM of 23.7% and SAM of 6.3% reported in December. Response agencies in the area also currently report very high numbers of severely malnourished children being admitted into the selective feeding programmes.

Based on the above highlighted aggravating factors, coupled with the prevailing insecurity which limits humanitarian access, the nutrition vulnerability is likely to persist and potentially deteriorate unless a combination of emergency nutrition interventions, adequate integrated humanitarian response and capacity strengthening of current and new nutrition stakeholders is undertaken alongside improved humanitarian access.

Map 6: Nutrition Situation Estimates, Post *Gu* '09



Map 7: Nutrition Situation Estimates, Post Deyr '09/10



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The overall food security situation in urban areas has shown some improvement, although a significant number of poor households continue to struggle to meet their basic food needs. Humanitarian crisis for poor urban households persists in central regions, as well as in parts of the North, while there are some indications of improvement in the Northwest and parts of the South. The number of people in crisis has reduced to **580,000** from **655,000** in the Post Gu '09. Out of the total people in crisis, about **465,000** people are in **AFLC** and about **115,000** are in **HE** (Map 1 and Table 1).

Food access of urban poor is still constrained by persisting inflation, high food prices, low income opportunities and the presence of large numbers of IDPs. Additionally, deepening drought in the rural livelihoods of central and northeastern Somalia, as well as violence and civil insecurity in conjunction with shrinking humanitarian support, compound the current food crisis.

Compared to the pre-inflationary period (defined as March 2007), inflation remains high (73-140%) in Somali Shilling areas as indicated by the CPI of the MEB (see Market sector). The CPI has decelerated slightly in all regions since June '09, except in central areas where it is tending towards high inflation levels of one year ago (Dec. '08). In Somaliland Shilling areas, the CPI reduced in 2009, but inflation is still 9% above the reference period. These changes are reflected in the cost of the minimum expenditure basket (CMB). Since June '09, the CMB increase in central regions is equivalent to 31%, while CMB decrease in the South, Northeast, and Northwest correspond to 14%, 10% and 8%, respectively. The CMB increase in the Central is mainly attributed to cereal price increase.

Wage rates are showing a general increase in most parts of the country, mostly influenced by the high inflation (Figure 15 and 16). However, other positive factors are influencing wage rates including improved crop production in the South and increased livestock exports (see Livestock sector). Currently wage rates exceed 2008 and the 5-year average (2003-2007) levels. Wage rates for Dec. '09 are 215-345%, 121% and 134% higher than the 5-year average in the South, Central and North, respectively. Rates in SiSh areas of the Northwest are only 11% higher than the 5-year average due to relatively lower inflation. An analysis of TOT for cereal to labour, which is a key measure of purchasing power for the urban poor, shows an overall improvement throughout the country when compared to 2008. However, when the TOT are compared to the reference 5-year average (2003-2007), they are well below average, except for most parts in the South, where TOT are either at or above average levels. The lowest TOT (cereal/labour) for Somalia is in central regions; it is 37% below the 5-year average.

Most urban poor must resort to social support in order to meet the CMB, and in some cases even the social support is not sufficient to meet these needs. For example, in central regions the social support, which averages around 25% of income, does not cover the income gap when trying to meet the CMB. In the northern SoSh areas, the gap is covered through social support (20% of income). However, in southern SoSh areas no significant gap between income and CMB is observed. Significantly, in all areas, most of the household income is spent on food, with the highest share of food expenditure (80%) found in central regions. The high percentage of expenditure on food is another indication of the dire state in central regions.

An integrated analysis of the findings based on the *Nutrition Situation Framework* indicates a worrisome nutrition situation in urban centers ranging from **Serious** to **Very Critical**, similar to the rural livelihoods across all regions. The high incidence of disease in Juba, has negated the gains made through improved access to food, leading to an overall **Critical** situation in the urban centers therein. The declining humanitarian space in the Shabelle regions has reduced the access to basic services and contributed to the **Very Critical** situation. For details, see the Nutrition Technical Series Report, scheduled for release in mid February, 2010.

Figure 15: Average Wage Rates, Cereal Prices and Terms of Trade Cereal to Labour in SoSh areas

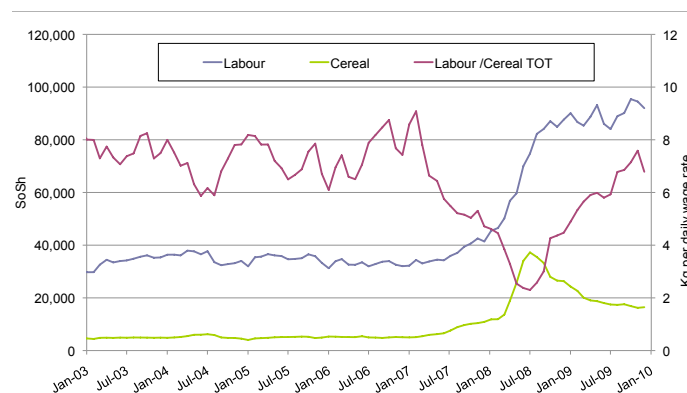
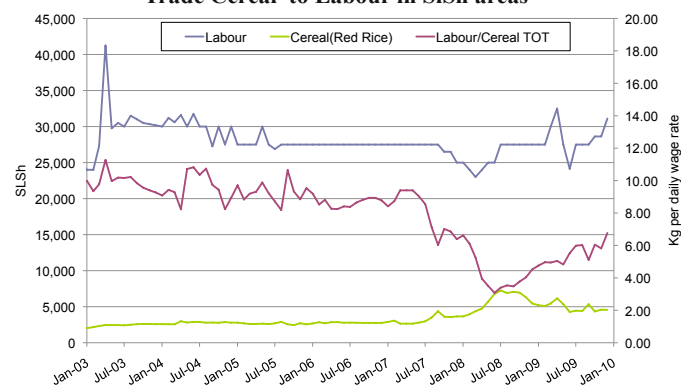


Figure 16: Average Wage Rates, Cereal Prices and Terms of Trade Trade Cereal to Labour in SiSh areas



RURAL

The post *Deyr* '09/10 livelihood based integrated food security analysis indicates an acute humanitarian crisis for 1,255,000 rural people in Somalia. The number of people in crisis reduced since the post *Gu* '09 by 15%. The number of people in **HE**, 540,000, has also lowered and is currently less than the number in **AFLC**, 715,000. The largest concentration of rural population in crisis is in Galgaduud, Hiran and Mudug. In these regions, populations in **AFLC** and **HE** account for 75-80% of the total rural population.

There is deterioration in rural areas of Sool and Nugal regions in the north, with increased numbers of rural populations in crisis. On the other hand, the situation has significantly improved in Juba regions to a complete recovery from crisis with the entire rural population identified as **Borderline Food Insecure (BFI)**. There is also a significant reduction of populations in crisis, in the range of 50-73%, in Bay, Lower Shabelle and Gedo regions (Map 8).

Gedo

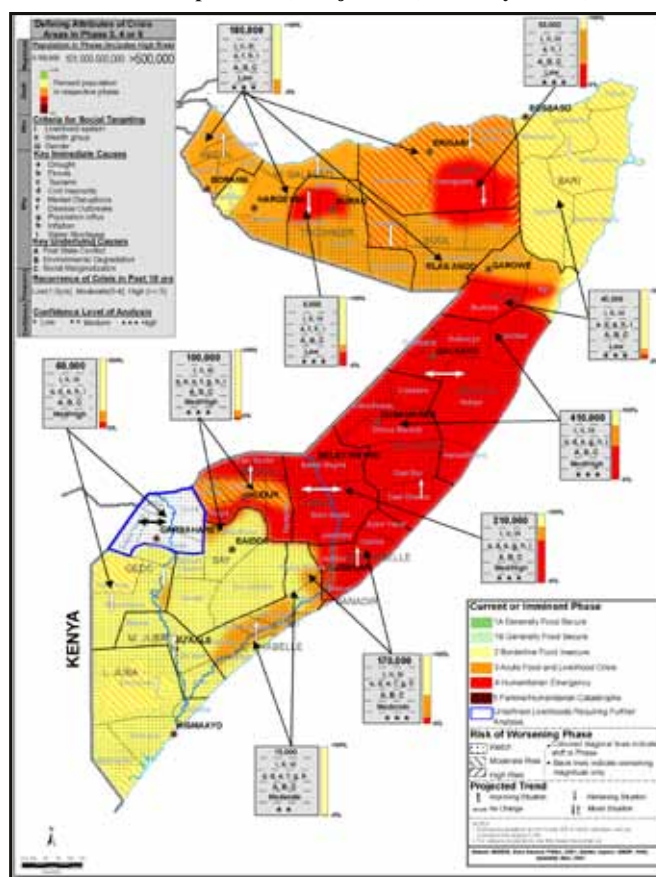
In general, the food security situation has significantly improved in Gedo region, although there are some pockets of limited improvement, especially in the agropastoral areas of Dolow, Luq and Garbaharey districts in northern Gedo. Currently 90,000 people are in crisis, of which 20,000 are in **HE** and 70,000 are in **AFLC**. This indicates 61% reduction of people in crisis from *Gu* '09, mostly due to the reduced number of people in crisis in rural areas. Since the *Gu* '09 the number of people in rural areas in **HE** decreased from 40,000 to 20,000, while those in **AFLC** decreased from 80,000 to 40,000. Additionally, 30,000 urban poor remain in **AFLC** (Table 1 and Map 1).

The IPC map for northern Gedo is 'flagged' as an area of '**Undefined Livelihoods Requiring Further Analysis**' because of the long-term reliance on humanitarian relief (since 1992), which may have changed the livelihood patterns. Therefore, the impact of macro-economic changes on livelihoods in northern Gedo cannot be precisely estimated until a new baseline study is conducted in the area.

The improving food security is primarily due to slightly above normal rainfall, although there was a long dry spell throughout November and December in the northern Gedo that negatively affected pasture regeneration and crop growth. Rangeland conditions have recovered from the previous poor seasonal performances and livestock production and reproduction have significantly improved throughout the entire region. Consequently, livestock that outmigrated during *Gu* '09 have returned to the region. Livestock conception rates have significantly improved; they are medium for large ruminants and high for small ruminants. Camel calving rate is medium resulting in average milk production throughout most of the region. Cattle and goats calving and kidding rates are low to none but high levels of kidding and lambing are expected during late March or early April '10.

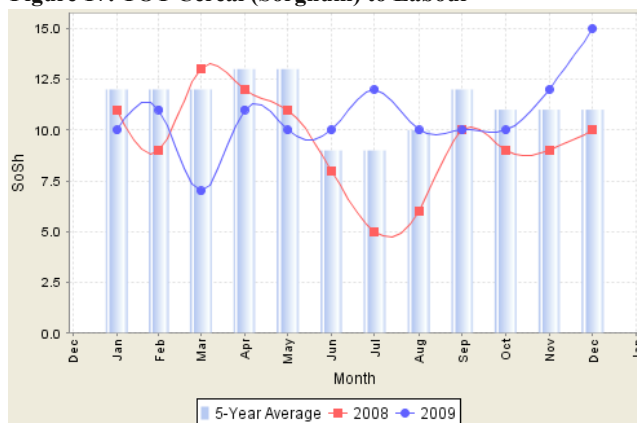
There is variation in livestock herd dynamics by species. The increase in herd sizes is highest for camels, which are now slightly above the baseline levels for the first time since *Deyr* '05/06. Sheep, goats and cattle have shown a slight increase but are significantly below the baseline levels throughout Gedo due to low to no births, high offtake from livestock sales (to cover food and non-food purchases and pay high debts) and endemic diseases. The crop production of Gedo region has also shown an improvement since the *Deyr* '07/08. Cereal production is estimated at 4,600MT, which is 107% and 219% higher than *Deyr* '08/09 and *Gu* '09 cereal productions, however, it is 33% and 36% lower than PWA and the 5-year average, respectively.

Map 8: Somalia Integrated Food Security Phase Classification, Rural Populations, Projections, January - June, 2010



Income has increased as a result of improving crop, milk and livestock sales. Additionally, labour and self employment opportunities have improved because of increased agricultural and trading activities in the region. Prices of cereals have declined since Aug. '09 by 16% but are still 275% above the 5-year average. Livestock prices have also shown an increasing trend since Jan. '09 (114% and 238% of July '09 and the 5-year average, respectively). Consequently, purchasing power has improved since Aug. '09, and is stronger when compared to the preceding 5-year period. TOT for cereal to goat is estimated at 58kg/head, while TOT for cereal to labour is about 12kg of red sorghum/day labour wage, which is the highest since Feb.'09 (Figure 17).

Figure 17: TOT Cereal (Sorghum) to Labour



The integrated analysis of information from nutrition assessments conducted in Gedo in Dec. '09, health information and feeding facilities' data show a **Very Critical** nutrition situation among the pastoral and a **Critical** situation among the riverine and agropastoral populations. The data in pastoral livelihoods indicates the likelihood of a sustained **Very Critical** nutrition situation. However, because of the improved food security indicators particularly among the Southern Inland pastoral population in southern Gedo, who have increased camel milk production and access coupled with low cereal prices in the region, the nutrition situation of this population group is likely to improve in the coming months.

Juba Regions

Overall, the food and livelihood security of Juba regions showed a continuous improvement in the last five seasons, starting from Deyr '07/08. Currently only 15,000 people in urban areas are identified in AFLC, of which 10,000 people are in Lower Juba and 5,000 people are in Middle Juba. This is a 38% reduction in terms of urban population in crisis since last Gu. The total rural population of the two regions are identified as BFI (Table 1 and Map 1).

Current improvements in Juba regions are attributed to exceptionally good Deyr rains that fell in most areas, improving cereal production in both riverine as well as agropastoral livelihoods. In this Deyr cereal harvest was above PWA for both regions (12,000MT combined harvest) and off-season maize (1,700MT) is also expected in March '10. The regions also had a good sesame production (about 9,000MT) this season, which was a result of an increased planting in response to a high export demand, as well as favorable weather conditions. Off-season cash crops are also expected to be harvested (3,200MT of sesame and 600MT of cowpea) in March '10. Good agricultural season has improved household access to food and cash and resulted in significant improvement of labour and self-employment opportunities for rural as well as urban livelihoods. The terms of trade between daily labour wage and maize vary in riverine livelihoods. In Lower Juba riverine, TOT in Dec. '09 is 23kg of maize/daily labour wage, which is 35% increase since July '09, while TOT in Middle Juba riverine is 16kg/daily labour rate, which is 16% lower than July '09 attributed to maize price increase in Middle Juba in Dec. '09.



Good Cattle Body Condition, Arabaw, Buale, Middle Juba, January, 2010



Good Sesame Crop, Nasib-Yasin, Jilib, Middle Juba, January, 2010

Similarly, all pastoral livelihoods (southeast, southern inland and coastal pastoral) received good rainfall, which affected favorably rangeland conditions. Livestock body condition and production have improved following significant improvements in pasture and water in *Gu* '09 and *Deyr* '09/10. Livestock herd sizes for all species have mostly recovered from the drought and are near or above baseline. Livestock owners have also benefitted from increased milk and meat availability, high livestock prices, and improved terms of trade. In Lower Juba, terms of trade between sorghum against local goat are 55% higher than July '09 (from 96kg of sorghum/head to 150kg of sorghum/local goat price in Dec. '09). Similarly, TOT in Middle Juba between maize and local goat is 130kg of maize/goat head, which is 8% higher than July '09 (78kg of maize/head) reflecting the increase in livestock prices.

The current Post *Deyr* '09/10 integrated analysis of the nutrition assessments, health information and targeted feeding facilities data, indicates a sustained **Very Critical** nutrition situation among the pastoral and a sustained **Serious** among the riverine populations. The agropastoral population show an improvement of nutrition situation from **Very Critical** in *Gu* '09 to the current **Critical** levels.

Bay and Bakool

Overall, the food and livelihood situation in rural areas of **Bakool** region has indicated a slight improvement in *Deyr* '09/10 season. However, 39% of the population of Bakool region is still in crisis with 120,000 people identified either in **HE (25,000 people)** or in **AFLC (95,000)** with a projected early warning level of **Watch** up to June '10. This is a 25% reduction from the number of population in crisis in *Gu* '09, with particularly large decline in pastoral areas (45%). **Bay** region, on the other hand, has shown a continuous and significant improvement in most livelihoods since *Deyr* '07/08, such that there is now only 5,000 rural people, who were in HE in *Gu* '09, are currently in **AFLC** and the 5,000 people in AFLC during *Gu* '09, are now identified as **BFI**. Out of the total population in crisis, an estimated 50,000 urban poor in both regions are in **AFLC** (25,000 in Bakool and 25,000 in Bay) (Table 1 and Map1).

The food security situation has improved in Bay-Bakool Agropastoral due to near average *Deyr* '09/10 rains. This livelihood zone received above average cereal production (91% of PWA in Wajid, 96% of PWA in Hudur and 146% of PWA in Tieglow), which contributed to an overall slightly above average *Deyr* cereal production in the region (108% of PWA). However, poor rains in Bakool Agropastoral and Southern Inland Pastoral resulted in poor crop production and below average rangeland conditions. In pastoral livelihoods, livestock (especially cattle) body conditions are poor, and milk production is low for cattle, sheep and goats. Also, livestock herd sizes are below baseline due to the high offtake over a several consecutive seasons of poor rainfall.

Labour opportunities are limited to agricultural activities in agropastoral areas. Therefore, poor households are resorting to distress strategies, such as increased charcoal production, collection of firewood/building materials, and labour migration to main towns and seeking social support (food in-kind or cash) in the neighbouring region of Bay, which received a bumper harvest. The situation is exacerbated by highly volatile civil security situation affecting trade movement between regions.

In Bay region, the food security situation has significantly improved primarily due to an exceptionally good *Deyr* cereal production (212% of PWA and 207% of the 5-year average), as well as cash crop production. Grazing and browsing conditions have improved following above average *Deyr* '09/10 rains, while all livestock species are in good body conditions, calving and kidding rates are normal and milk production has increased. Herds of all livestock species (camel, cattle, sheep/goats) are also recovering, yet below baseline levels, but projected to increase further by June '10.



Poor Sorghum Crop, Boodaan, Rabdhure, Bakool, December, 2009



Good Maize Crop, Ooflaw, Qansah Dheere, Bay, January, 2010

Labour opportunities and daily wage rates have also improved due to high demand for *Deyr* '09/10 agricultural activities such as weeding, harvesting, threshing and transportation.

Nutrition assessments conducted in Dec. '09 together with information from health and feeding facilities data (July-Dec. '09) indicate a sustained **Serious** nutrition situation in Bakool Agropastoral, a sustained **Very Critical** nutrition situation in pastoral areas of Bakool and among the agropastoral population of Bay region. The underlying causes of acute malnutrition in the pastoral areas of Bakool include high morbidity coupled with limited access to health, safe water and sanitation services, and poor child care and feeding practices. The sustained nutrition situation in Bay is mainly attributed to poor dietary quality, very poor access to basic services identified in the region and the high disease burden are the major underlying causes of malnutrition.

Lower and Middle Shabelle

The food security and livelihood situations in the Shabelle regions showed improvements. In **Middle Shabelle**, the number of people in crisis is estimated at 195,000 people, of which 35,000 people are in **HE**. This is a 22% decrease from the last *Gu* '09, which is attributable to the reduced number of people in crisis in rural areas. Most parts of the region are still identified in **HE** phase with an early warning level of **Watch** projected up to June '10. There is a complete recovery from HE for populations in Shabelle Riverine (5,000 people in HE in *Gu* '09) and Southern Inland Pastoral (6,000 people in HE in *Gu* '09). Currently 11,000 people in the riverine and 10,000 people in the pastoral areas are estimated to be in **AFLC**. The number of people in crisis in Southern Agropastoral reduced from 145,000 people in *Gu* '09 to 125,000 people (95,000 people in **AFLC** and 30,000 people in **HE**) in *Deyr* '09/10. In Central Agropastoral, 17,000 people are in **AFLC** and 7,000 people are in **HE**, indicating a substantial 70% reduction in the HE numbers from *Gu* '09. Additionally, an estimated 25,000 urban people are in **AFLC** (Table 1 and Map 1).



Good Sesame Crop, Sabun, Jowhar, M.Shabelle, December, 2009

In **Lower Shabelle**, the food security situation continues to improve since *Gu* '08. In *Deyr* '09/10 all livelihoods have shown an improvement with an overall decrease of 80% since post *Gu* '09. In *Deyr* '09/10, a total of 15,000 rural people are identified in **AFLC** (**10,000 people in riverine and 5,000 people in the agropastoral of Wanlaweyne**), with an early warning level of **Watch** up to June '10. There is no change in urban livelihood since *Gu* '09 where an estimated 45,000 people remain in crisis (35,000 in **AFLC** and 10,000 in **HE**) (Table 1 and Map 1).

The improvement in **Middle Shabelle** is attributed to average *Deyr* '09/10 rains, which had favorable impact on pasture and water prompting the return of outmigrated livestock (during *Gu* '09) back to the region. This has led to improved availability of milk and milk products in the region. Also, cereal production in this *Deyr* season was near average (88% of PWA, 144% of the 5-year average) and cash crops (rice, cowpea, sesame) were also harvested (over 5,000MT). The TOT between local goat against maize is equivalent to 147kg of maize per head of local goat. The TOT between labour and maize in Jowhar is 7kg/daily labour wages, which is 6% lower than in July '09 attributable to decreased labour wages and increased maize prices since July '09.

In **Lower Shabelle**, which is the main maize producing region in Somalia, the cereal production was below normal in this *Deyr* (62% of PWA – see Agriculture sector). Nevertheless, food security situation has improved due to improved rangeland and livestock conditions and increased milk production. Also, carryover stocks are available from last *Gu* season, which will be sufficient for 3-4 months, while good cash crop production (7,000MT of Sesame and 500MT of cowpea) was received in this *Deyr* season. The purchasing power, as measured by the terms of trade, has improved due to increased daily labour wage rates and decreased cereal prices since July '09. The TOT between labour and maize in Marka market, for example, is 77% higher than in July '09 (increased from 9.4kg/daily labour wage to 16.6kg/daily labour wage). The terms of trade between maize and local goat in Marka is 197kg/head, which is the same as in July '09.

The nutrition situation has significantly improved in the agropastoral population from the previous **Critical** situation reported in the *Gu* '09, (GAM rate > 15%) to **Serious**. The improvement is attributed to increased access to and consumption of milk and crops (maize rice, sesame and cow peas) following normal rainfall in the CowpeaBelt and agropastoral areas. The riverine population are in a sustained **Serious** nutrition phase for the fourth consecutive season. The riverine population had better dietary diversity and access to fish, fruits and vegetables than their agropastoral counterparts.

The IDPs (Afgoye corridor), however, showed a significant deterioration in their nutrition situation from the previously sustained *Serious* situation to a **Critical** phase. Furthermore, except for Merka town, no disease outbreaks were reported in Middle and Lower Shabelle, unlike the previous season when AWD, especially in Wanlaweyne and Merka, alongside with outbreaks of measles and cholera in Afgoye and Merka had aggravated the nutrition situation.

Hiran region

The food security situation in Hiran region has shown a slight improvement but the region is still sustained in **HE** phase with an estimated 240,000 people, or 73% of the total regional population, being in crisis. The majority of the total people in crisis, or 165,000 (69%), are in **HE**, while 75,000 are in **AFLC**. Most of the population in **HE** (97%) are located in rural areas. The agropastoral livelihood zone is worst affected with 94,000 people in **HE** and 29,000 in **AFLC**. In pastoral livelihood, population in crisis has slightly reduced from *Gu* '09 and now is estimated at 55,000 people, the majority (64%) of whom are in **HE**. An estimated 30,000 people in riverine livelihood remain in **HE** with no change from *Gu* '09. The number of affected urban population is unchanged since June '09 with 25,000 people in **AFLC** and 5,000 in **HE** (Table 1 and Map 1).

The sustained crisis in Hiran region is a combination of factors, including another season of poor *Deyr* '09 rains, recurrent conflict and low economic activity. Food access is severely stressed due to the cumulative impacts of six consecutive seasons of below normal rains resulting in a very poor cereal production (31% of PWA). Income earning opportunities are also limited due to the lack of agricultural activities and reduced number of marketable livestock. Livestock herds in pastoral areas have decreased further and are about 38-40% of the baseline levels. Repayment of debts, accumulated over the years of drought, is another heavy burden for the poor who are struggling to meet their daily food needs.



Collection of Building Materials, Jalalaqsi Riverine, December, 2009

Civil insecurity, characterized by recurrent fighting, increased organized assassinations and tensions in both urban and rural areas causes intermittent disruptions in trade and economic activities. Food access is further constrained by a high cereal price (red sorghum), which is 140% above the 5-year average. Many households are unable to fully meet their food needs because of limited purchasing power. The TOT between labour to sorghum significantly declined in July-Dec. '09 (by 52%) due to significant increase in red sorghum price (by 75%) and reduced labour wage (by 9%). TOT between red sorghum and local goat has also declined, by 47%, as a consequence of increased cereal prices and reduced local goat prices (7% decrease since July'09).

The nutrition situation of the agropastoral population in Hiran indicates a sustained **Very Critical** situation since *Gu* '09 and the pastoral populations showed a deterioration from the *Critical* phase in *Gu* '09 to **Very Critical**. The riverine population remains in a sustained **Critical** phase for the last two years since *Gu* '07.

Central

Central regions of Somalia continue to remain in humanitarian emergency. The situation has deteriorated further in drought-affected Hawd and Addun pastoral livelihoods of Galgaduud and Mudug regions, while there are some signs of improvements in Cowpea Belt and Coastal *Deeh*.

As a result, the number of people in crisis in the region has slightly reduced from 485,000 in *Gu* '09 to 475,000 in *Deyr* '09/10. Currently, 210,000 people in rural and urban areas are in **AFLC**, while 265,000 are in **HE**. Proportion of people in **HE** has reduced from *Gu* '09 (62% of the total population of Central) to *Deyr* '09/10 (47%), which is indicative of reducing severity of the crisis in central



Destitute Pastoralists, Dhusamareb, Galgaduud, December, 2009

Somalia. The number of people in crisis has also increased in urban areas - from 55,000 in *Gu* '09 to 65,000 in *Deyr* '09/10. Depending on the extent of conflict in the region, an early warning level of **Watch** is identified for the region up to the end of June '10 (Table 1 and Map 1).

The food security situation in Hawd and Addun pastoral livelihoods of central regions continued to deteriorate as a result of cumulative effects of seven consecutive seasons of poor rainfall performance, high cereal prices and worsening civil security. These pastoral areas experience severe water shortages and drastic deterioration in pasture conditions, which resulted in poor livestock body condition; low to none kidding /calving level for all species; limited number of saleable animals and significantly reduced herd sizes for all species (Hawd: camel - 40% of baseline and sheep - 18 % of baseline; Addun: camel - 29% of baseline and sheep/goat - 19 % of baseline). The food security situation is exacerbated by increasing displacement and a temporary halt in humanitarian aid due to worsening civil security. Poor households are relying on distress coping strategies to access food (food loans, collection of firewood/building materials, migration to main villages and towns, etc.

On the other hand, food and livelihood security of agropastoralists and pastoralists in Cowpea Belt and Coastal *Deeh* has significantly improved following normal rainfall performance in *Deyr* '09/10, which resulted in improved crop production (maize and cowpea). Pasture and water conditions are also good leading to improved livestock body conditions and medium to high conception rates for all livestock species (camel, cattle, sheep and goat). However, the herd sizes of livestock still remain below baseline levels (cattle -29% of baseline; sheep/ goat – 79 % of baseline).

The Post *Deyr* '09/10 integrated nutrition analysis conducted by FSNAU and partners has indicated a sustained **Critical** nutrition situation in the Hawd and Addun pastoralists. The nutrition situation is **Serious** for agropastoralists in the Cowpea belt agropastoralists; while the situation is **Alert** for the Coastal *Deeh* pastoralists. Furthermore, the Hawd and Addun livelihood zones indicate a further risk to deterioration if the underlying factors are not addressed.

Northeast

The food security situation of the Hawd and Addun Pastoral livelihoods in southern Nugal and northern Mudug regions remains in **HE phase** as in *Gu* '09. However, there is a significant improvement in Hawd areas of Eyl and Garowe districts where population in crisis reduced by 24%, with a significant reduction of people in HE. The total population in crisis in Bari, Nugal and northern Mudug regions is estimated at 250,000, of which 130,000 are urban poor. Of the total population in crisis, 180,000 (72%) are in **AFLC** and 70,000 are in **HE**.

Despite reduced cereal and increased livestock prices in the Hawd and Addun Pastoral livelihoods of southern Nugal and northern Mudug, these regions remain in **HE** because they have experienced the fifth successive season of poor rainfall (*Deyr* '07/08, *Gu* '08, *Deyr* '08/09, *Gu* '09 and *Deyr* '09/10). The resultant poor pasture and limited water availability in Hawd and Addun Pastoral, as well as parts of Coastal *Deeh* has led to poor livestock body condition, low to no calving and kidding, very poor milk production and a limited number of marketable animals. Although rice prices are the lowest since March '08, they are still 152% higher than the December 5-year average. Sorghum prices are only 13% lower than the rice price, which limits the ability of households to cope with high prices through switching consumption to the cheaper locally produced cereals (like sorghum and maize). Additionally, early water trucking has already started, which increased water price by up to 300%, further constraining households' access to food and income. Labour opportunities in the affected areas are limited due to lower trading activities, ban on charcoal exports and low construction pole availability. Poor households are employing distress coping mechanisms, including seeking social support (in-kind or cash) and labour migration to main towns.

Nugal valley and Sool Plateau livelihood zones of Nugal and Bari regions have received near normal to normal rainfall, which improved rangeland conditions and livestock body condition (camel, sheep and goat). However, huge livestock in-migration (from north Bari, north Mudug and south Nugal) is likely to cause early pasture and water depletion and increase in water prices. Therefore, increased livestock off-take to meet high water and food costs can be anticipated. This will lead in further reduction in livestock herd size, which has already been well below baseline levels.



Poor Pasture and Shoaat Body Condition, Beyra Galkayo, North Mudug, December, 2009

Apart from the Hawd and Addun livelihood zones who are faced with a sustained **Critical** nutrition situation, there have been improvements across all the rural livelihoods of the northeast regions since the *Gu*'09. In the Golis/Gagaab livelihood zones, the nutrition situation is **Serious**, while in Sool Plateau, Nugal Valley and the Coastal Deeh livelihood zones, the situation is **Alert**. The improvements are mainly attributable to favorable food security indicators, particularly increased milk production, consumption and income access. In the Hawd and Addun, the situation remains worrying due to persistent seasons of rain failure that has led assets losses and increased dependency on the available meager resources.

Northwest

The food security situation has deteriorated in most pastoral and agropastoral livelihoods of the Northwest. The total population in crisis is estimated at 355,000 people, with 40,000 in **HE**. Sool Plateau pastoral and Togdheer agropastoral livelihood zones that were identified in AFLC with High Risk to **HE** during *Gu* '09 have deteriorated to **HE**. Pastoral livelihoods of Hawd, Nugal Valley and Golis/Guban/Gebi are remaining in **AFLC** with an early warning level of **Watch** in Hawd and lower Nugal valley, while East-Golis and upper Nugal valley are also in **AFLC** with a **Moderate Risk to deteriorate to HE**. Agropastoral areas of Awdal and W. Galbeed are remaining in **AFLC**, while the agropastoral area in Gebiley district has improved to **BFI**. Of the total population in crisis, 70% are in rural areas with an estimated 30,000 people in **HE** and 220,000 in **AFLC**. In urban areas, an estimated 95,000 people are in **AFLC**, while 10,000 are in **HE** (Table 1 and Map 1).

Generally, the food security situation in the Northwest has deteriorated due to cumulative effects of three to four consecutive seasons of poor rainfall performance with negative impact on pasture, water, crop and livestock conditions. Calving and kidding are low to none and livestock offtake for all species is high due to death caused by pasture stress during recent *Hagaa* dry season. Livestock herds decreased in most areas with Sool Plateau showing the largest decline from the baseline figures (sheep - 32% of baseline; camel - 1% of baseline). Three-fold increase in water costs and water trucking in Sool Plateau, Hawd and Upper Nugal have also been reported.

Poor rainfall performance of *Deyr* '09/10 led to stressed abnormal migration of pastoralists, incurring increased household expenditure and debt accumulation. Pastoral destitution in Sool, Togdheer, and Sanaag regions is increasing with poor pastoralists moving from pastoral areas towards villages and urban centres in search of support. Also, agropastoral areas in Togdheer, Awdal and Hargeisa have suffered from crop failure (cereals). The exception is Gebiley district, which received a good harvest due to good *Karan* and *Deyr* '09 rains leading to increased farm labour activities.

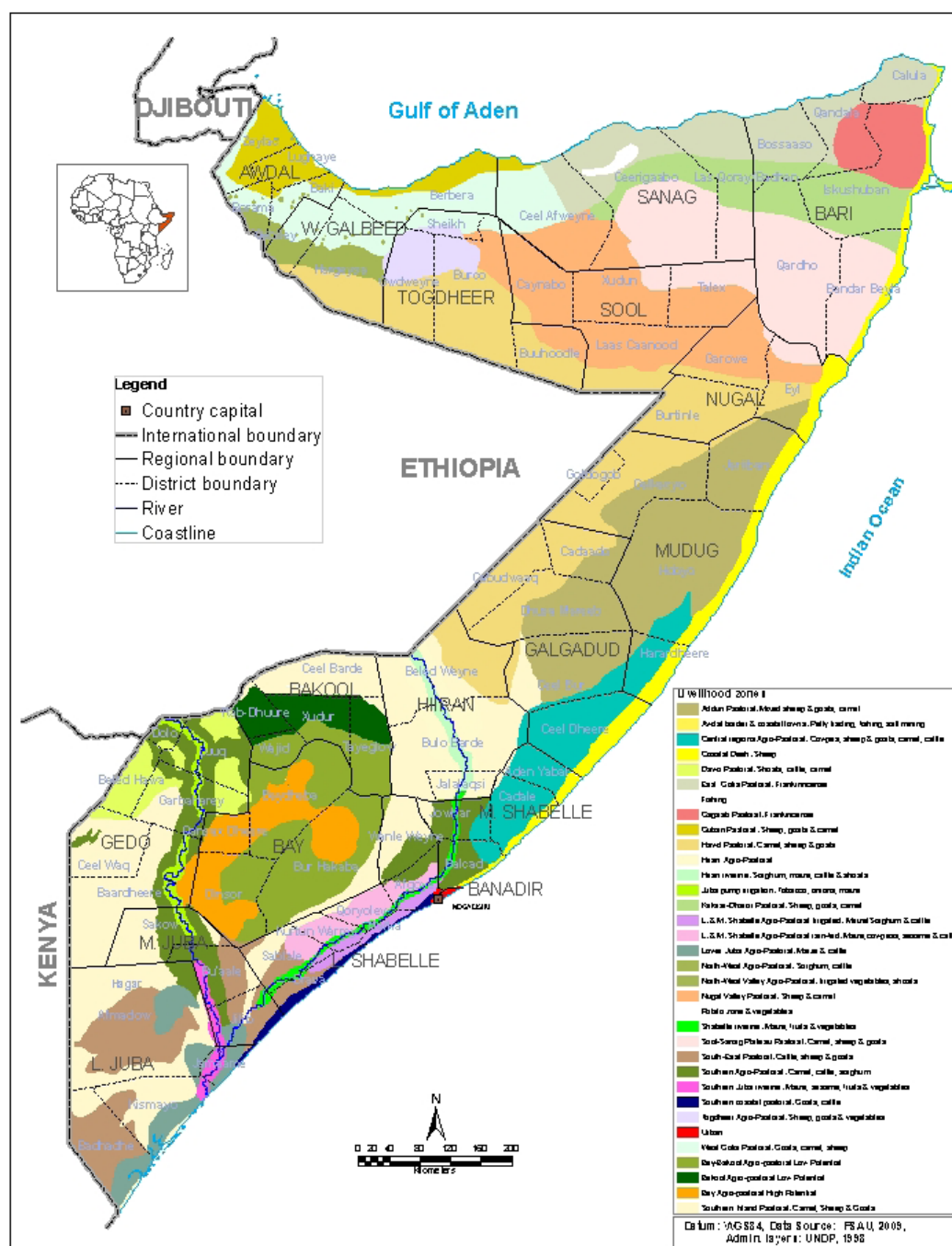


Continuous Water Trucking, Sool Plateau, Sanaag, December, 2009

Cereal prices have increased (27%) since July '09 in W.Galbeed and Awdal regions following the below average *Deyr* '09/10 cereal production, while they have remained stable in Togdheer and Sanag regions due to increased trade flows. Local quality goat prices increased in all regions due to low supply. Consequently, TOT of sorghum to labour has declined in W.Galbeed and Awdal regions, while it has increased in Togdheer and Sanag region due to the stability in cereal prices. TOT between local quality goat and sorghum followed a similar trend in these regions. However, poor households in Togdheer and Sanag regions cannot benefit from the TOT increases due to drastic reduction in livestock herds and poor livestock body conditions.

The current Post *Deyr* '09/10 nutrition situation generally depicts an improved nutrition situation in most of the livelihood zones compared to the Post *Gu* '09. The West Golis and Guban livelihood zones indicate an improvement from **Serious** to **Alert**, while the East Golis of Sanaag/Gebi valley livelihood zones show slight improvement from **Critical** to **Serious**. The nutrition situation for the Sool Plateau livelihood zone compared to the Post *Gu* '09, has also improved from **Serious** to **Alert**. Also illustrating an improvement are the populations of the Hawd of Sool livelihood zone, from **Serious** to **Alert**, and the agro-pastoral populations of Awdal and Galbeed from a **Critical** nutrition situation to **Alert**. The Hawd of Hargeisa remained in a sustained **Serious** nutrition situation, while the nutrition situation of the agro-pastoral population of Togdheer remained **Critical**. However the following livelihood zones: - Hawd of Hargeisa, Sool Plateau, East Golis and upper Nugal Valley pose a risk to deteriorate if the food security indicators in these areas do not improve in the coming season. The nutrition situation of the IDPs from Burao is classified as **Serious**, an improvement from **Very Critical** in the Post *Gu* '09, while the nutrition situation of the Berbera IDP population still remains as **Critical**. The nutrition situation of the Hargeisa IDPs remained stable at **Serious**.

Map 9: SOMALIA LIVELIHOOD ZONES



Recent and forthcoming publications and releases

FSNAU/FEWSNET Deyr '09/10 Climate Outlook, February 2010

FSNAU Technical Series Report Nutrition Situation, February 2010 (Forthcoming)

FSNAU Technical Series Report, Post Deyr '09/10 Analysis, February 2010 (Forthcoming)

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