

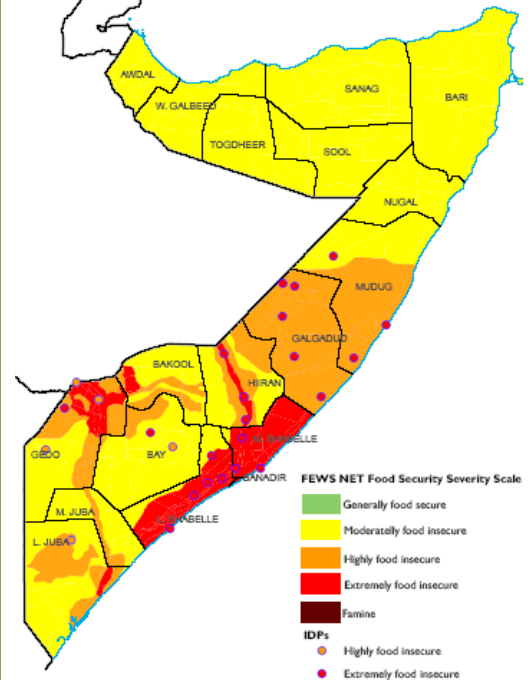
SOMALIA Food Security Outlook

April to September 2008

Issued in collaboration with FAO/Food Security Analysis Unit (FSAU)

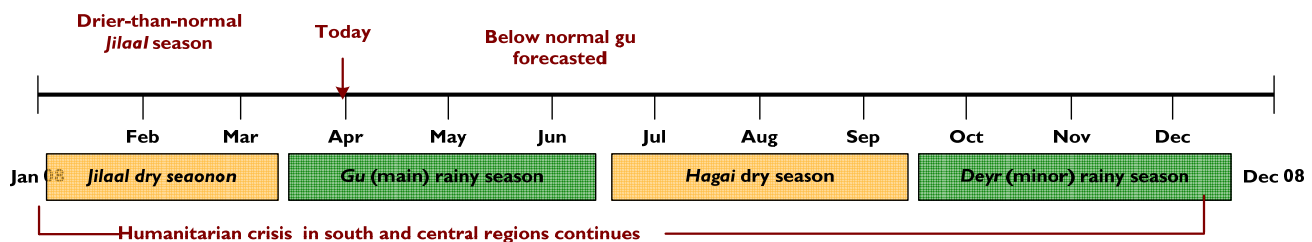
- The overall food security situation continues to worsen in central and Shabelle regions and among the poor urban poor and internally displaced persons (IDPs) in the south. Due to the presence of La Niña phenomenon, which is associated drier-than-normal weather conditions, pasture and water resources throughout the key pastoral areas of the country are being depleted earlier than normal, leading to a deepening crisis among pastoral communities.
- The number of people in need of humanitarian assistance and livelihood support for at least the next six months will continue to increase from the current level of roughly 2 million people, up to as high as to 2.5 million, a figure that includes urban poor households in the south and central regions.
- In addition to a poor *deyr* 2007 (October to December) harvest, high international food prices, hyperinflation, civil insecurity, and restricted inter-regional and cross border trade have resulted in low supplies of staple food in reference markets, leading to abnormal cereal price increases. Consequently, food access and livelihood stability is deteriorating rapidly.
- In the most-likely scenario through June 2008, the food security situation in many parts of the country, especially in the livestock dependent areas of the central regions, is expected to deteriorate further, while parts of northeast and northwest will be at moderate risk of an Acute Food and Livelihood Crisis.
- In the worst-case scenario, the *gu* (April-June) rains will fail, and armed conflict will escalate, displacing more people, further restricting trade, market, and humanitarian access, all leading to further increases in prices. In this scenario, the food security of pastoral and ago-pastoral communities, displaced populations, and the urban poor in the southern, and central regions, as well as parts of the northeast and northwest, would deteriorate significantly, leading to high levels of food insecurity, affecting more than 2.5 million people who would require humanitarian assistance and livelihood support.

Figure 1. Current estimated food security conditions (March 2008)



Source: FSAU and FEWS NET

Seasonal calendar and critical events



Source: FEWS NET

Current food security situation

Food security in many parts of southern Somalia (especially Shabelle valley), central regions, and Mogadishu, continues to deteriorate. Prices of locally produced cereals (maize and sorghum) in most of reference markets in the south and central regions have already increased by 300-400 percent within the last 12 months. Similarly, prices of imported commodities like rice and vegetable oil have increased by an average of 150 percent, while the Somali Shilling depreciated by an average of 65 percent in the southern regions during the same period. The below normal *deyr* harvest, trade and market disruptions, displacement, hyperinflation, political tension, low intensity warfare, and continued civil insecurity are drastically reducing household food access, increasing the extent and severity of malnutrition, and increasing the level of humanitarian needs. The market-dependent, poor population in urban areas, small towns, and villages, as well as IDPs are therefore extremely food insecure (Figure 1). These households are affected by the combined effects of increased food prices and disruption of markets and economics activities, coupled with the loss of income, which limits their access to food and other basic items.

The population in Shabelle and central regions remain the worst affected in the current humanitarian crisis. The overall *deyr* 2007/08 season cereal production of these regions was very poor, and marked the third consecutive season of poor maize production, leading to shortages of staple food in villages and markets centers. About 60 percent of the total population identified in Humanitarian Emergency and Acute Food and Livelihood Crisis in Somalia are found in Shabelle and central regions. Since December 2006, these regions are also hosting the largest concentration of new IDPs from Mogadishu, totaling about half a million people. The nutrition situation remains critical, and rates of global acute malnutrition are above emergency thresholds of 15 percent Global Acute Malnutrition. Continuing insecurity has disrupted market and farming activities during the last several months, intensifying the crisis.

Of particular concern are drought affected livestock dependent communities in the central regions, where over 200,000 people are extremely food insecure and face a rapidly deteriorating situation. The water and pasture shortages following the poor *gu* 2007 and 2007 *deyr* rains have caused livestock productivity and value to decrease significantly during the January to March *jilaal* dry season. Compared to the same month last year, the price of goat in March 2008 dropped by 19 percent (from USD 19.93 to USD 16.2). Increased food prices and decreased livestock prices have also caused the terms of trade between goats and imported rice to drop by 35 percent (from 41kg/goat to 26kg/goat). Dwindling rangeland resources have increased competition among clans, which escalated the already high incidence of resource-based conflict. The underground water reservoirs are all dry; water trucking has been ongoing for more than 10 consecutive months and is expected to continue till the onset of the *gu* rains in mid-April. Due to insecurity, pastoralists in central regions of Hiran, Galgaduud, and south Mudug have limited options for migration and are continuing to purchase expensive trucked water (over 300 percent of the normal cost) for their livestock since June last year, leading to forced liquidation of livestock assets by increasing sales. Increasing fuel prices and inflation are aggravating water availability and access for most poor households in these regions. Given the geographical extent of the drought in central regions, the presence of large number of IDPs and, the loss of remittance from Mogadishu's Bakara market, coupled with persistent insecurity and hyperinflation, a humanitarian emergency of great magnitude is imminent in the central regions of Hiran, Galgaduud, and south Mudug.

One year ago, the number of protracted IDPs in the country was estimated at 400,000, but today is more than 1 million and will continue to increase. The situation of the new IDPs continues to deteriorate, as the number of people fleeing Mogadishu to other parts of the country since August 2007 has more than doubled, from 325,000 to more than 700,000 in the last six months. In addition to insecurity, the displaced populations have limited social support from host communities, are affected by limited options to earn income, and face record high food and non-food prices. Over 80 percent of the newly displaced people have concentrated in Lower and Middle Shabelle and central regions that already face problems of food access, collapsing livelihoods, and emergency malnutrition levels. Recent nutrition surveys by FSAU and partners confirm that the nutrition situation of the protracted IDPs in Bosaso, who have been displaced for years, is at or greater than internationally accepted emergency thresholds (GAM 23.3 percent; SAM 4.9 percent) and requires urgent attention.

Although the overall food security situation of the rural population in Gedo and Juba valley indicates a significant recovery from the effects of the 2005/06 regional drought, the prevailing La Niña phenomenon associated with drier-than-normal conditions led to an earlier than expected depletion of water and pasture sources, which has affected livestock body condition and production.

Most-likely food security scenario through September 2008

Based on the outcome of the recently concluded Climate Outlook Forum (COF) for the Greater Horn of Africa, the presence of La Niña, and the associated drier-than-normal conditions coupled with the cooling of sea surface temperatures, is leading to an increased probability of near to below normal *gu* rainfall from April to June. Another season of below normal rainfall will lead to a poor harvest and further deteriorations in water and pasture availability, affecting livestock productivity and value. Given the prevailing inflation, coupled with insecurity, a below normal *gu* rains will lead to worsening of the current humanitarian crisis throughout the country, which will continue through June 2008 and beyond.

In the most-likely scenario through September 2008, the food security situation in many parts of the country, especially in the Shabelle, and livestock dependent areas of central regions are expected to deteriorate further. The lack of pasture and water in the central regions and parts of the south will cause livestock body conditions to deteriorate, milk production to decrease, and the market value of livestock to fall. The lack of access to milk and meat products, coupled with limited income from the livelihood, will cause the rates of child malnutrition to increase among the pastoral community. A greater number of pastoralists in the central regions, including middle and better-off households, will likely face a humanitarian emergency (Figure 2). In areas of the south, including Juba riverine areas and parts of Gedo, Bay and Bakool regions, high and extreme levels of food insecurity will persist and expand.

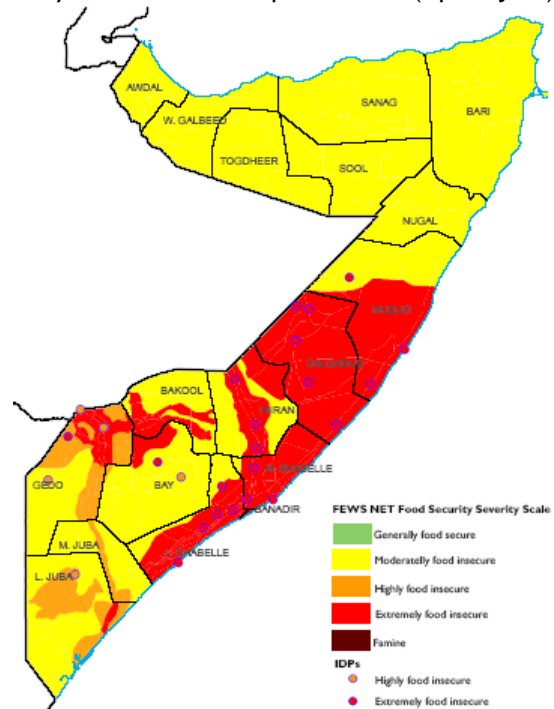
Based on the forecast, the *gu* rains are expected to end in the south earlier than normal, resulting in a dry spell during crop development stages. The below-normal *gu* rains from April to June will impact the *gu* harvest in August 2008. Poor rains will also prompt early pastoral migration towards riverine areas and permanent water sources as early as mid-June. Given the prevailing hyperinflation, the low supply and high cost of inputs, such as seeds, fuel, and fertilizers will constrain irrigated maize production in riverine areas of Shabelle and Juba regions. Maize availability in local markets will decline, resulting in further price increases through September, thereby affecting poor urban households' food access in the south. In this scenario, cereal availability and access will increasingly become difficult in agro-pastoral areas of Shabelle, Hiran, central, Bakool, Gedo, and parts of Juba regions.

Although the *deyr* season (October to December) is the peak of flooding in southern Somalia, if the *gu* season long rains are heavy in Ethiopian highlands, it will lead to increased river levels in the Juba and Shabelle rivers. Due to weak river banks and dilapidated flood control systems, it is likely that localized flooding will occur downstream of the river valleys. Though heavy seasonal floods along these river valleys would submerge villages, destroy underground granaries and feeder roads, and displace communities in the Gedo, Juba Valley, Hiran and Shabelle regions, localized and short term floods will be beneficial, providing supplementary irrigation for riverine communities.

In the North, key pastoral areas of Sool Plateau and Hawd, which are moderately food insecure, will be a risk of an Acute Food and Livelihood Crisis, as the existing water crisis will deepen. Rangeland resources will be depleted early, and abnormally high dependence on water trucking will result in asset depletion and increased debt levels for poor pastoral households. Already, malnutrition levels in Hawd pastoral livelihood zone are at above the emergency threshold levels (GAM >17 percent and SAM 1.3 percent).

The locust eggs laid in the last *deyr* season will hatch in May and June, with the possible emergence of small hopper bands in pastoral areas of the northeast, northwest and parts of the central regions, and could damage existing rangelands. New

Figure 2. Estimated food security conditions, most-likely scenario, second quarter 2008 (Apr to June)



Source: FSAU and FEWS NET

hoppers will also lay more eggs in late June, perpetuating the cycle of locust infestation. With no active control system in place, locusts are likely to continue to harm the fragile environment in pastoral areas of northeast, northwest and parts of central regions.

The low market supply of local and imported food commodities will continue to prevail in the south and central regions. The prices of imported commodities and local cereals will continue to increase in this scenario, due to production shortages and the disruption of internal and cross-border trade. High staple food prices, coupled with hyperinflation, will therefore affect food access and availability for all livelihood groups. The lack of confidence in the Somali shilling will push small and medium traders out of markets and lead to the closure of many small businesses. This, in turn, will further increase unemployment, which will have a ripple effect on the local economy, leading to a further deterioration of food security among the urban poor and IDPs. In this scenario, domestic demand for cereals will remain high, while inter-regional and cross-border trade will continue to be disrupted by conflict. The closure of the Kenya-Somalia-Ethiopia border is expected to remain, restricting not only trade but population movement as well. As a result, the food security of the market dependent urban population, as well as agro-pastoral communities that experienced *gu* season crop failure, will deteriorate.

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

- Below normal, poorly distributed *gu* rains throughout the country
- Localized but beneficial flooding in Juba and Shabelle valleys
- Increased conflict, political tension, and civil insecurity results in more displacement and contributes to an increase in resource based conflict in drought affected pastoral areas
- Trade and market disruptions, hyperinflation, and restricted cross-border trade lead to low supply of local and imported food commodities in reference markets.
- Humanitarian access deteriorates, leading to reduced interventions.

In the most likely scenario, conflict and civil insecurity will escalate in the south and central regions, where government forces and opposition groups are fighting. Frequent inter-clan clashes in traditional grazing areas will limit migration options, especially in the central regions. Inter-clan and increased resource based conflict are also expected in riverine farming areas of Juba and Shabelle regions, where pastoral communities will migrate in search of pasture and access to river water. Increased civil insecurity and road blocks on routes leading to markets and urban centers will also affect market activities and trade flows. Restrictions in movement and trade will in turn affect food availability and prices. Given the prevailing political tension and renewed armed confrontations, a political settlement will most likely remain elusive, and the number of IDPs and refugees will continue to increase gradually. Humanitarian access in south and central regions, where about half of the 2 million people in need of assistance are already facing a Humanitarian Emergency or Acute Food and Livelihood Crisis, will remain difficult.

In the most likely scenario, the targeting of aid agencies and their staff by armed gangs and opposing groups will continue, leading to shrinking humanitarian access and response capability. As a result, an increase in child malnutrition rates (from the current critical levels) in IDP camps and drought affected regions is more likely. In areas that are Generally Food Insecure, the underlying causes will remain unaddressed, thereby increasing household vulnerability to further shocks. A significant number of people in need of assistance will remain inaccessible, leading to increased destitution and movement towards refugee and IDP camps.

In this scenario, the number of people in need of humanitarian support in the country will increase beyond the current level of 2 million. Advocacy and improved humanitarian access is crucial to facilitate increase humanitarian assistance, including establishment of supplementary feeding programs in areas where child malnutrition rates are already high.

Worst-case food security scenario through September 2008

In the worst-case scenario, the hazards associated with climate and conflict are more severe and have a stronger negative impact on the already precarious food security situation than in the most-likely scenario, causing conditions to deteriorate. The economic factors and dysfunction underlying the most likely scenario, including the slowdown of imports and exports, injection of new counterfeit banknotes, high transportation costs, and restricted inter-regional and cross-border trade, would deteriorate further and have a greater negative impact on food security and the ability of households to cope. The geographic extent of the humanitarian crisis will expand to wider areas, including parts of the north and northeast (Fig. 3).

In this scenario, the April to June *gu* rains, which are critical for crop production, on which agro-pastoralists in central and southern areas rely for about 70 percent of their annual food and fodder access, will fail. *Gu* crop failure would compound the effects of the previous below normal *deyr* crop in January to further reduce access to food and income.

Given the prevailing mobilizations and lack of political goodwill, conflict and civil insecurity intensifies and will in turn lead to increased armed confrontation. Low intensity warfare between the Transitional Federal Government (TFG) and opposition groups will continue. Increase restrictions of movements and trade (including roadblocks on routes leading to urban areas), and high taxation and extortion by local authorities and militia groups, will affect food availability and prices. In this scenario, the number of urban poor in need of assistance will increase as malnutrition rates reach above the emergency threshold in many urban areas, especially in the southern and central regions.

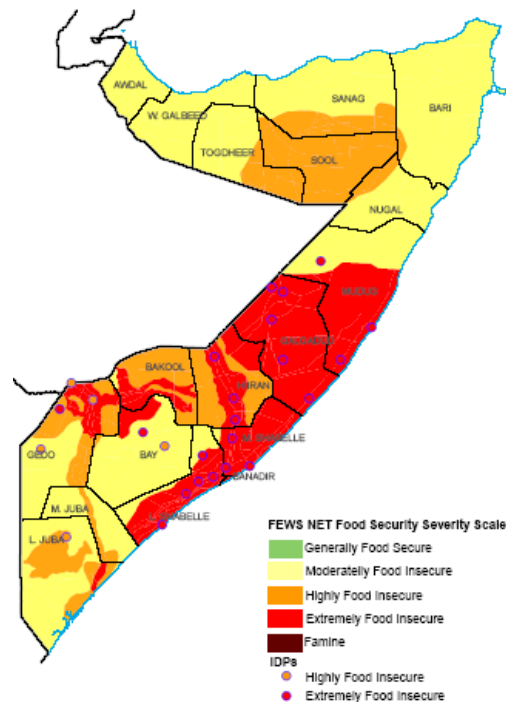
The increase in international food prices, local trade collusion, high tariffs, taxations, and extortion are other factors which would influence the prices of both imported and locally produced food commodities in south and central Somalia. Loss of confidence in the Somalia shilling would result in closure of many small businesses and increase unemployment, which will have a ripple effect on the local economy and lead to further deterioration of food security, especially among the urban poor and IDP groups. In the worst case scenario, these economic factors are not expected to show any sign of improvement.

The continued disruption of trade and increased sea piracy would affect the import capacity as well as the supply of humanitarian relief. Cross-border trade would also be affected further as neighboring countries, responding to heightened conflict in Somalia, will increase restrictions on cross-border movement, which would also influence higher food prices. In this scenario, pastoralists in the south whose their terms of trade are now favorable will also have difficult food access as they will have to purchase cereals at abnormally high prices. As a result of these conditions, the humanitarian emergency in Somalia will deteriorate further, especially throughout south and central regions, while spreading into parts of north and northeast that are now only moderately food insecure. In Shabelle Valley, central, Mogadishu, Hiran, and parts of Gedo and Bakool regions, where a humanitarian crisis has persisted for several seasons, conditions will deteriorate, forcing the sale of productive assets and complete out-migration (*Kinaan*). Moreover, additional households that are currently moderately food insecure will become highly food insecure. Malnutrition rates will likely increase beyond the current >15 percent global acute malnutrition (GAM) emergency thresholds levels.

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

- *Gu* rains fail in the northeast, central and southern regions.
- Major war between the government and opposition groups results in more displacement, and a greater increase in resource based conflict in drought affected pastoral areas.
- Trade and market disruptions, hyperinflation, and restricted cross-border trade lead to low supply of local and imported commodities in reference markets in south/central regions, significantly increasing prices.
- Humanitarian access deteriorates, leading to reduced interventions.
- Rates of malnutrition continue to increase above the emergency threshold.

Figure 3. Estimated food security conditions, worst-case scenario, Third quarter 2008 (July to Sep)



Source: FSAU and FEWS NET

In this scenario the number of people requiring humanitarian assistance by late 2008 could increase to more than 2.5 million. Life-saving interventions will be needed, specifically targeting households in areas facing Humanitarian Emergencies (Shabelle Valley, central regions, Mogadishu, Hiran, north Gedo, parts of Bakool, and in IDP camps). Throughout the south and central regions, continued food aid will be required for IDPs, the urban poor, and drought affected pastoral and agropastoral communities that are already highly food insecure.