FSAU
Food Security Analysis Unit
Somalia

Food Security & Nutrition

Issued
February 11, 2009

Special Brief - Post *Deyr* '08/09 Analysis

This special FSAU brief provides a summary of the key findings of the post *Deyr* '08 Assessment and Analysis, which are the results of fieldwork (December 21 – January 1), regional and national analysis workshops (January 2 - 23) and a Technical Verification and Partner Vetting Meetings (Nutrition January 22, and Food Security January 27). FEWS NET Somalia along with 31 partners, including regional authorities, UN and international agencies and local and international NGOs participated and supported in this post *Deyr* assessment and analysis process. FSAU presented these results in Nairobi at a Somalia Support Secretariat Special Meeting on January 30 and issued a Press release on February 5. The press release and presentation are available on the FSAU Website.

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KEY FINDINGS

The findings of the FSAU, FEWSNET, and its partners' post *Deyr* '08/09 seasonal assessment confirm that there is an **ongoing and sustained Humanitarian Crisis in Somalia, with 43% of the total population of the country, or around 3.2 million people, in need of emergency livelihood and life-saving assistance at least until June 2009.** A failed state since the early 1990s, Somalia has had recurring humanitarian emergencies over the last 18 years and is a country characterized by chronically high rates of acute malnutrition above emergency levels, and chronic levels of food insecurity among the rural population. The ongoing humanitarian crisis, however, is unique in that the crisis is widespread; not only are 1.2 million rural people in crisis, nearly two-thirds of those in crisis, or 2 million people, are urban poor and internally displaced populations (IDPs) (Maps 1 and Table 1).

The key driving factor behind the current emergency is a macro-economic crisis, driven by a significantly devalued Somali Shilling and hyperinflation of basic food and non-food items. This macro-economic crisis is exacerbated by months of increased conflict that have internally displaced more than 1 million people throughout the country. Furthermore, the *Deyr* '08/09 season rains (Oct.-Dec. '08) were below normal. This not only deepened an already severe ongoing drought and pastoral humanitarian emergency in the central regions, but has resulted in another year of below normal annual cereal production and an overall annual cereal availability deficit of 120,000MT. Nutrition surveys continue to highlight emergency levels of acute malnutrition throughout Somalia, due to a combination of a deteriorating food security situation, continuing displacement caused by insecurity, uncontrolled disease outbreaks and a fundamental lack of basic services. An estimated 200,000 children under 5 years of age in Somalia are acutely malnourished, of which 60,000 are severely malnourished and at an increased risk of death if they do not receive the appropriate specialist care. One in 6 children are acutely malnourished and 1 in 20 are severely malnourished. These extreme numbers will have a long-term devastating impact on the economic potential of the country.

Urban Food Security Crisis

The growing **urban food security crisis** is widespread throughout Somalia, affecting roughly 22% of the total urban population, or **705,000 people**. Of this total, **565,000 are in Acute Food and Livelihood Crisis (AFLC)**, requiring emergency livelihood support and **140,000 are in Humanitarian Emergency**, requiring both emergency livelihood and life-saving assistance. Additionally, there are an estimated 1 million new IDPs from the increased conflict over the last two years, plus 275,000 protracted IDPs, who are equally affected by the food price crisis. Urban poor food access is severely constrained as people struggle to meet their basic food and non-food needs in the face of record high food prices. Prices of imported rice and local cereals increased between 200% and 400% in the first 6 months of 2008. These price increases are significantly greater than global cereal price increases. Although prices declined from Oct. '08, providing some benefits, they are still 350-825% above normal. The average cost of the urban poor minimum expenditure basket needed for survival has more than doubled in the last year, while the purchasing power of the poor is significantly below normal. Incomes have not kept pace with rising food and non-food prices.

With income unable to match basic food and non-food price increases, the urban poor have had to seek additional financial support, in the form of cash gifts, loans and remittances, to meet their basic food needs. By Dec. '08, financial assistance was covering between 15-35% of the cost of a minimum survival basket of goods. Poor households have switched to purchasing cheaper local cereals, are skipping whole meals and borrowing food from neighbours. The percentage of urban poor households employing one or more of these distress coping mechanisms increased from 32% in Oct. '07 to 59% in Oct. '08. The increased inability to cope has resulted in reduced levels of dietary diversity, as 20-60% of the poor urban households were reported to have consumed less than four food groups per day in Oct. '08. If the situation does not improve, urban populations will exhaust many of their coping options. Already urban poor households are deeply indebted and becoming more impoverished, thus increasing their vulnerability to shocks and further crises.

key findings/population figures

Pastoral and Agro-pastoral Rural Crisis

The rural crisis is more severe in that more than half or **680,000 people are in Humanitarian Emergency (HE)**, requiring emergency livelihood and life-saving interventions**.** Another **535,000 are in Acute Food and Livelihood Crisis (AFLC),** requiring emergency livelihood support. The largest concentrations of rural populations in crisis are in the south (66%) and central regions (29%). Most of the rural populations in crisis are agro-pastoralists (49%) and pastoralists (40%). The severity and depth of the rural crisis is greatest in the Galgadud, Mudug, Hiran and Middle Shabelle regions, where 50-70% of the total rural population is in crisis and where the number in HE exceeds the number in AFLC. The central regions are suffering from one of the worst droughts in recent history following successive seasons of rain failure. The impact of the drought is further exacerbated by the hyperinflation in food prices, increased conflict, and the presence of 200,000 IDPs in the region. The viability of pastoral livelihoods is threatened as livestock production is very poor and herds are significantly below baseline levels due to death and high off-take. Malnutrition rates, already above emergency levels, are continuing to deteriorate, and currently there are more than 10,000 children less than 5 years, who are severely malnourished.

Internally Displaced Populations in Crisis

Increased civil insecurity is leading to distressed population movement both internally and cross-border. Since July '08, it is estimated that the number of IDPs has increased from 870,000 to 1,020,000 (UNHCR, Protection Cluster, Jan, 9, '09), and there are more than 275,000 protracted IDPs. Livelihood options are limited and food access has deteriorated for many IDPs, worsened by the ongoing macro-economic crisis. Social support systems are overburdened and there is limited access to basic services. Nutrition surveys confirm increased vulnerability and malnutrition rates above emergency levels.

Implications for Response

- **Humanitarian Access***:* Actions to increase humanitarian space and safety to ensure that the number of people in need, receive assistance

- **Emergency Humanitarian Assistance to Save Lives**
  - Targeted to areas and livelihood groups identified in HE
  - Targeted to areas and livelihood groups identified in Critical and Very Critical nutrition situation
  - Increased attention to areas where past/current needs exceed response
  - Scale-up in areas continuing to deteriorate (Galgadud, Mudug, M. Shabelle, Hiran, north Gedo)
  - IDP and Urban populations identified in HE and with high rates of malnutrition

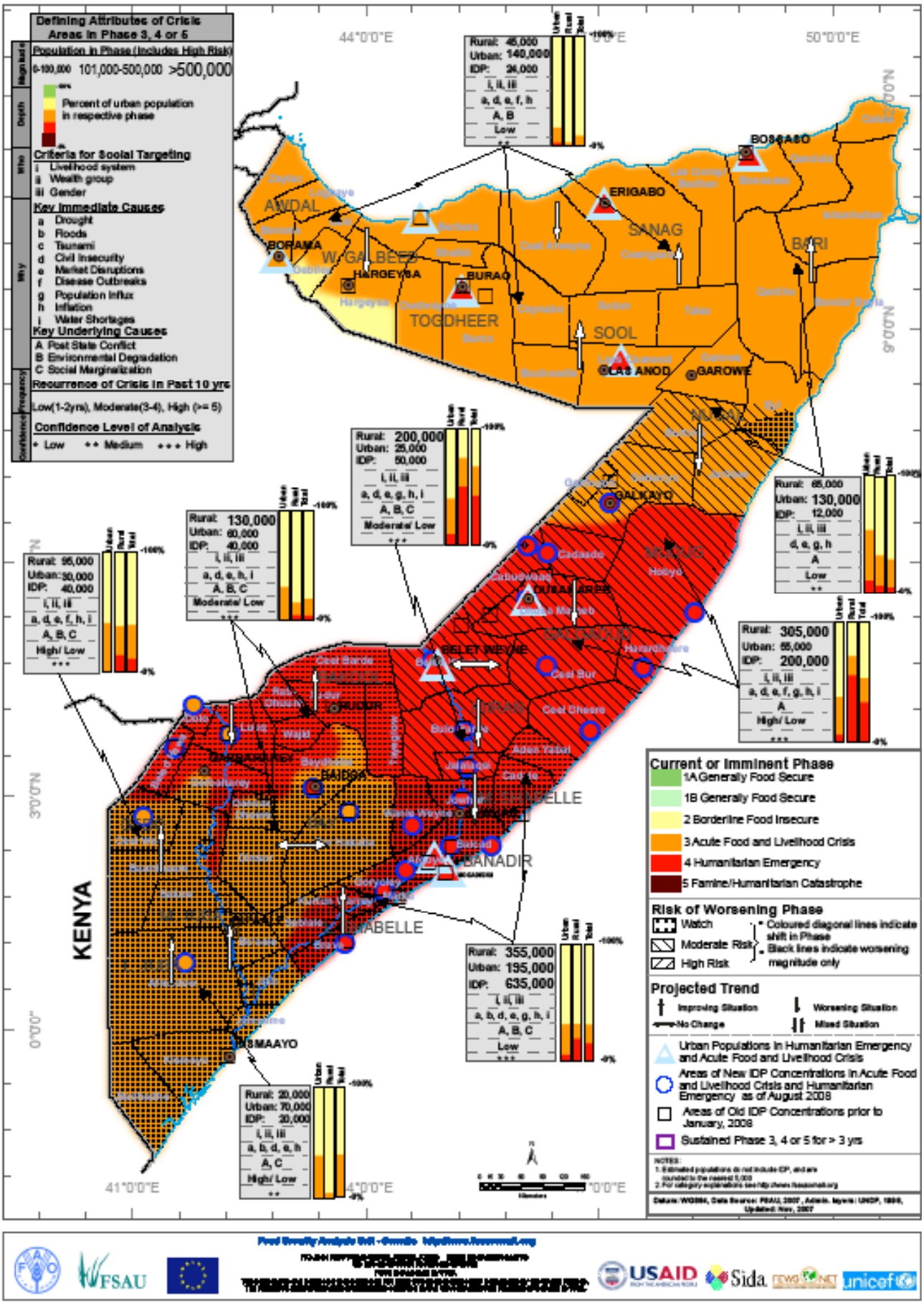
- **Emergency Livelihood Support**
  - Prioritize areas and livelihood groups in AFLC and HE
  - Scale-up to enhance capacity of people to cope with ongoing crisis and prevent the total loss of livelihood assets
  - Poor urban populations unable to cope with food prices increases and declining purchasing power
  - Newly developing areas and livelihood groups in AFLC (Golis/Guban pastoral in north)

Table 1: Somalia Combined Rural, Urban and IDP Population Numbers, January - June 2009

Region	UNDP 2005 Total Population	UNDP 2005 Urban Population	UNDP 2005 Rural Population	Urban in Acute Food and Livelihood Crisis (AFLC)	Rural in Acute Food and Livelihood Crisis (AFLC)	Urban in Humanitarian Emergency (HE)	Rural Humanitarian Emergency (HE)	Total in AFLC and HE as % of Total population
North								
Awdal	305,455	110,942	194,513	10,000	20,000	0	0	10
Woqooyi Galbeed	700,345	490,432	209,913	10,000	5,000	0	0	2
Togdheer	402,295	123,402	278,893	55,000	10,000	20,000	0	21
Sanaag	270,367	56,079	214,288	20,000	10,000	5,000	0	13
Sool	150,277	39,134	111,143	15,000	0	5,000	0	13
Bari	367,638	179,633	202,737	80,000	0	25,000	0	29
Nugaal	145,341	54,749	75,860	25,000	20,000	0	0	31
Sub-total	**2,341,718**	**1,054,371**	**1,287,347**	**215,000**	**65,000**	**55,000**	**0**	**14**
Central								
Mudug	350,099	94,405	255,694	30,000	60,000	0	80,000	49
Galgaduud	330,057	58,977	271,080	15,000	45,000	10,000	165,000	71
Sub-total	**680,156**	**153,382**	**526,774**	**45,000**	**105,000**	**10,000**	**245,000**	60
South								
Hiraan	329,811	69,113	260,698	20,000	65,000	5,000	135,000	68
Shabelle Dhexe (Middle)	514,901	95,831	419,070	30,000	65,000	0	165,000	50
Shabelle Hoose (Lower)	850,651	172,714	677,937	65,000	70,000	15,000	55,000	24
Bakool	310,627	61,438	249,189	25,000	80,000	0	45,000	48
Bay	620,562	126,813	493,749	35,000	5,000	0	0	6
Gedo	328,378	81,302	247,076	30,000	60,000	0	35,000	38
Juba Dhexe (Middle)	238,877	54,739	184,138	25,000	10,000	0	0	15
Juba Hoose (Lower)	385,790	124,682	261,108	45,000	10,000	0	0	14
Sub-total	**3,579,597**	**786,632**	**2,792,965**	**275,000**	**365,000**	**20,000**	**435,000**	**31**
Banadir	**901,183**	**901,183**	-	30,000	-	55,000	-	9
Grand Total	**7,502,654**	**2,895,568**	**4,607,086**	**565,000**	**535,000**	**140,000**	**680,000**	**26**

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	**705,000**	**9**	**22%**
Assessed **Rural** population in AFLC and HE	**1,215,000**	**16**	**38%**
Estimated number of new IDPs (UNHCR, Protection Cluster, Jan. 9, '09)	**1,020,000**	**14**	**32%**
Estimated number of protracted IDPs	**275,000**	**4**	**9%**
Estimated Rural, Urban and IDP population in crisis	**3,215,000**	**43**	**100%**

Map 1: Rural, Urban and IDP Populations, Projections January - June '09



integrated phase classification maps

climate

SECTOR HIGHLIGHTS

CLIMATE

The overall *Deyr* '08/09 season rainfall performance in terms of the amount, coverage and temporal and spatial distribution over time was mixed, but largely below normal. The *Deyr* '08/9 season rains started in early October in most regions, except in the Jubas, indicating a timely onset of the shorter rainy season (October to December). As the season advanced, however, the rains became inconsistent, localized and ended earlier than expected in November and were followed by dry conditions, which negatively affected proper crop development and pasture conditions, especially in the central regions and parts of the southern regions. In the drought-affected central regions, especially in Galgadud and parts of Mudug region, although satellite images show above normal rains (Map 2), *Deyr* '08/09 rainfall performance was largely poor, leading to poor vegetation conditions (Map 3). Most of the underground water reservoirs (*berkads*) remain dry, leading to abnormal pastoral migration (see Livestock Section). With the exception of Beletweyne district, rains were also poor in neighboring Hiran region.

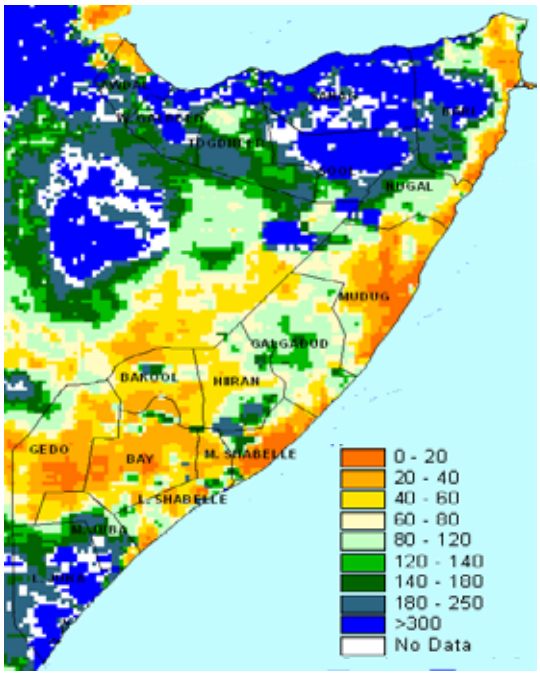
In the northwest and most of the northeast, normal to near normal rainfall was received (Figure 1). Rains were sufficient to improve pasture and water availability in most of the key grazing areas, particularly in the pastoral livelihood areas of Hawd, Nugal and Sool Plateau. However, in some areas in the north, rains were below normal, resulting in poor crop, pasture and browse conditions. These areas include most of the agro-pastoral areas, with the exception of Gebiley district, and the pastoral areas of Hawd of Hargeisa, and Golis-Guban,Togdheer, Galbeed and Sanag.

In the south, although early rainfall improved crop germination in parts of Gedo, Bay, Bakool and the Shabelle regions, the early cessation of rains in early November negatively affected pasture regeneration, crop development, and grain-setting stages, which led to below normal crop harvest, particularly in the Shabelle and Juba regions, and parts of Gedo (see Crop Section).

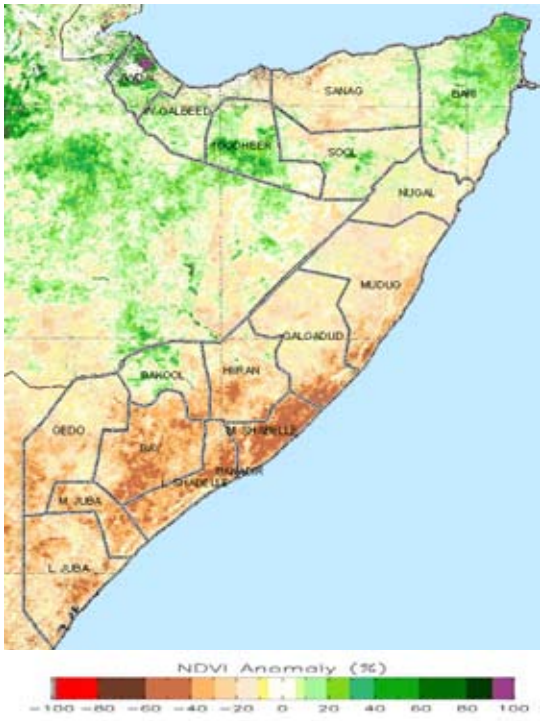
As a result of poor rains and the strong dry spell during the peak of the season in November, vegetation conditions in many parts of the country are largely below normal in the lead up to the long dry *Jilaal* season (Map 3). In order to improve the quality and interpretation of climate information, data and analysis, FSAU and FEWS NET started to use Normalized Difference Vegetation Index (NDVI) data extracted using FAO land cover maps for pastoral and agricultural areas of the country.

This more specific land cover and localized analysis of NDVI proved useful in field report and survey verification, and generally provides a more accurate analysis of vegetative conditions. For instance, in pastoral areas of Elberde district (Bakool region) normal satellite imagery shows below normal *Deyr* rains (Map 3), whereas the trend analysis of NDVI data and field reports both indicate significant improvements due to above normal *Deyr* rains (Figure 1). FSAU will continue to triangulate localized land cover and district NDVI analysis with all crop and survey field data in order to improve its analysis.

Map 2: Cumulative Rainfall (mm) Oct. 1-Dec. 31, '08

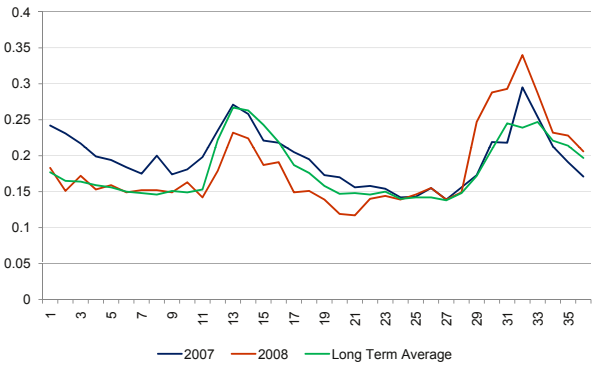


Map 3: Spot NDVI anomaly Dec. 30, '08



Source: NOAA/FEWS NET/USGS

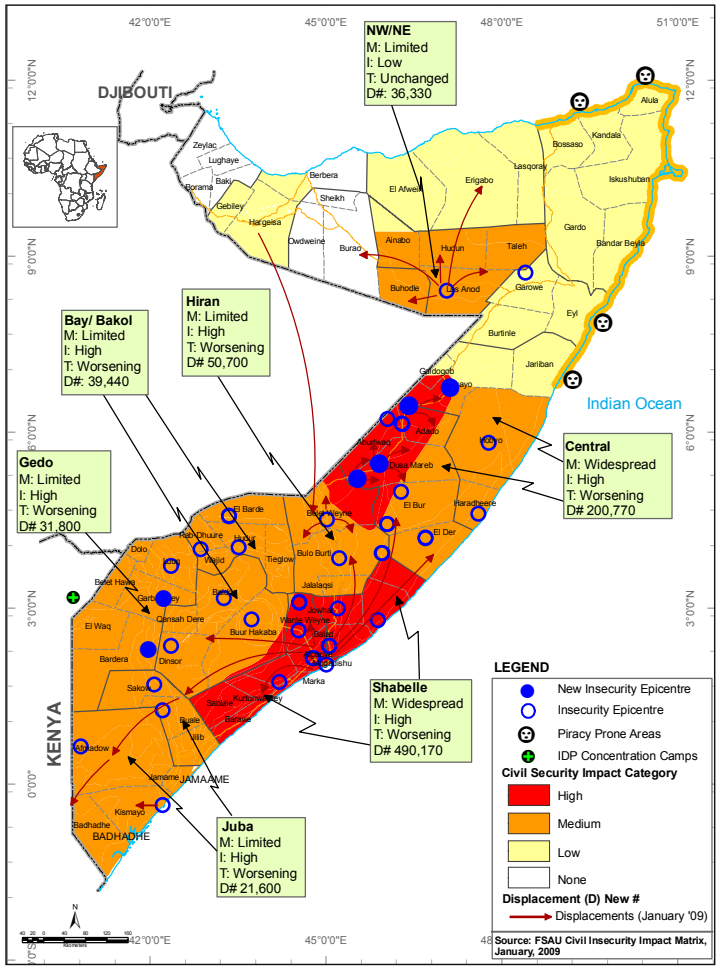
Figure 1: El Berde Vegetation Condition - NDVI Trend



CIVIL INSECURITY

The civil insecurity situation in Somalia, especially in the southern and central regions, is the worst since the civil war and collapse of the government in 1991-92. This is due to the volatile political situation and increased religious and ideological divisions. Most of the ongoing conflict is caused by power struggles between political and religious groups, while the rest is linked to resource-based conflict between clans and sub-clans. Overall, the impact of civil insecurity is greatest in the Shabelle and Galgadud regions, followed by the remainder of the southern regions and Mudug, as well as the areas around Lasanod in the north (Maps 4). The impact is greatest for urban communities and along internal and cross-border trade routes. There are reports of increased numbers of IDPs from Mogadishu moving through Juba and Gedo regions to refugee camps in Kenya.

Map 4: Somalia Insecurity Impact Outcomes, January '09



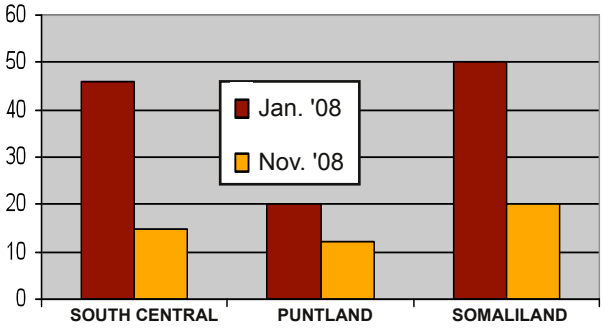
Source: FSAU, January 2009

In the northwest and northeast regions, which were relatively stable regions in the past, the security situation deteriorated from late October '08 due to multiple, simultaneous suicide car bombs in the main urban towns of Hargeisa and Bossasso. These attacks had an immediate effect on urban areas, as businesses and the Somali Diaspora began to divert their financial investments from Somalia to the Gulf and the United Arab Emirates (UAE). This led to a noticeable slowdown in construction and other activities, which negatively impacted the poor urban households reliant on wage labor. Tensions have increased between the host community and the large, newly arrived migrant communities from the southern and central regions, weakening urban-rural linkages and trade integrity between the north and south.

Direct and Indirect Impact

The escalation in armed conflict and insecurity has led to increased human rights abuses, killings, criminality, and population displacement. The number of IDPs has increased by 18% in the last six months from 870,000 to more than 1 million people, due mostly to the volatile situation in Mogadishu town (UNHCR, Protection Cluster, Jan. 9, '09). Inhabitants who remain in the city are living in a state of fear, following the withdrawal of Ethiopian troops. Many districts within the city are deserted as a result of past indiscriminate shelling; many houses and business assets have either been looted or destroyed.

Figure 2: UN Staff Presence



Throughout much of the southern and central regions, heightened insecurity continues to disrupt trade, economic activities, transportation networks and humanitarian access. In the Galgadud and Mudug regions, resource-based conflict has increased, restricting pastoral mobility, which has been an important coping option for pastoralists during the ongoing drought. Renewed fighting in late December '08, in the main towns of Dhusamareb, Guri-cel and Gelinsor, led many people to flee urban centers to rural areas, which already lack adequate water, shelter and food due to the ongoing rural **Humanitarian Emergency**. Fighting also significantly reduced the social support link between the rural and urban areas.

This already dire situation is worsened by the increasingly limited humanitarian interventions in the region since August due to increased civil insecurity, as threats and attacks targeting humanitarian workers significantly restricted humanitarian space in 2008. Since early 2008, over 183 security incidents, involving humanitarian aid workers or assets were reported. Thirty-four aid workers were killed; 26 aid workers kidnapped; and 16 are still in captivity. As a result, the presence of international humanitarian staff significantly reduced in 2008 and led to reductions or postponements in some areas in the delivery of aid (Figure 2).

agriculture

Deyr '08/09 CEREAL CROP PRODUCTION

Cereal Production

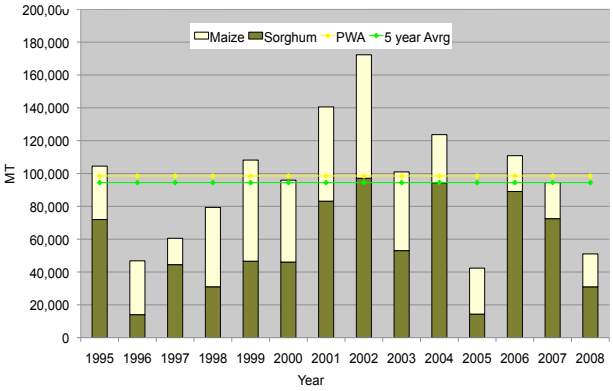
Deyr '08/09 cereal production in southern Somalia is estimated at 54,000 MT (of which 58% is sorghum, 38% maize and 4% rice), which is 54% lower than the Post-War Average (PWA 1995-2007). The *Deyr* '08/09 cereal production is the third lowest *Deyr* cereal production in the last 14 years (Table 2 and Figure 3). Poor rainfall in key cereal growing areas, poor irrigation infrastructure systems and seasonal overlap of off-season and *Deyr* season crops have precipitated the decline in cereal production. The poor cereal production is also attributed to high input costs, poor tillage and pest damage.

Table 2: *Deyr* '08/09 Cereal Production Estimates in Southern Somalia

Deyr '08/09 Cereal Production Estimates in Southern Somalia: Margin of Error +/- 15%						
Regions	Deyr '08/09 Production in MT			Deyr 2008 as % of Deyr 2007	Deyr 2008 as % of Deyr PWA (1995-2007)	Deyr 2008 as % of 5 year average (2003-2007)
	Maize	Sorghum	Total Cereal			
Bakol	100	2,700	2,800	98%	153%	119%
Bay	500	21,500	22,000	56%	70%	60%
Gedo	1,100	1,100	2,200	15%	37%	26%
Hiran	1,500	3,000	4,500	188%	67%	89%
Juba Dhexe (Middle)	100	1,200	1,300	18%	30%	30%
Juba Hoose (Lower)	300	0	300	54%	20%	45%
Shabelle Dhexe (Middle)	4,300	1,200	5,500	68%	46%	64%
Shabelle Hoose (Lower)	12,300	300	12,600	67%	36%	45%
Deyr 2008 Total	20,200	31,000	51,200	54%	52%	54%

The bulk of the *Deyr* season cereal harvest is from the Bay and Shabelle regions (43% and 36% of the total *Deyr* cereal production, respectively). *Deyr* '08/09 season sorghum production in Bay region performed well, contributing 71% to the total *Deyr* sorghum production. However, sorghum production failed in most other parts of southern Somalia due to poor rains. *Deyr* '08/09 maize production in southern Somalia, which comes mainly from the riverine livelihoods, is significantly lower than the long-term average (1995-2007), as well as the 5-year average (2003-2007). The *Deyr* maize production is estimated at 20,000MT, which is 50% of the *Deyr* PWA, but similar to *Deyr* '07/08 maize production (22,000MT).

Figure 3: Trends in *Deyr* Cereal Production (1995-2008) - Southern Regions



In the northwest, the *Gu/Karan* '08 cereal production is estimated at 17,500 MT, which is 94% of the PWA. However, Gabiley district alone contributed more than 80% of the total cereal production due to above normal rains, while other key cropping areas of Hargeisa, Borama, and Odweyne districts experienced rain failure, which resulted in cereal crop failure.

Good off-season maize crop, Ceel Wareegaw, Merka, Lower Shabelle, Oct. '08

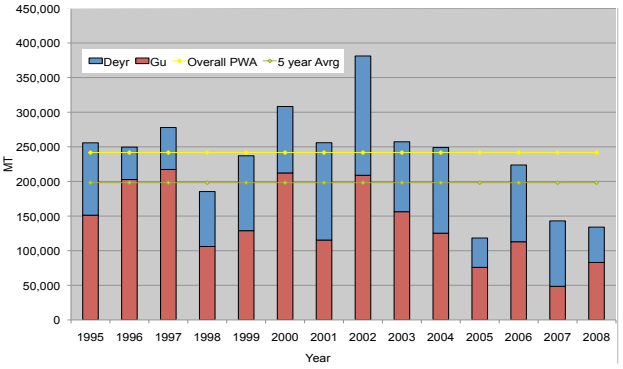
Off-Season Cereal Production

Unusual *Hagaa* rains in July and August '08 and seasonal floods in the Lower Shabelle and Juba regions (Jamame and Jilib) not only provided opportunities for fresh water fishing, but also resulted in two cycles of off-season crop production in some areas. FSAU and its partners conducted an off-season harvest assessment from Oct. 8-21,'08 and estimated the off-season cereal production to be 20,150MT, of which 92% is from Lower Shabelle and 8% from the Jubas. This is equivalent to 39% of *Deyr* '08/09 actual cereal production. In addition, both natural and man-made floods that occurred in Nov. '08 in the Juba regions also provided opportunities for off-season flood recessional crop production. The Juba regions are therefore expected to benefit from another off-season maize production from March to early April '09, which could contribute an additional 7,500MT.

Annual Cereal Production

Overall annual cereal production in southern Somalia (*Gu* '08 and *Deyr* '08/09) is estimated at 134,000MT, which is 55% of PWA and the second lowest cereal production in 14 years (Figure 4). If *Deyr* '08/09 rice production and off-season cereal production is included, estimated together at 32,000MT, the total annual cereal production in the south is 166,000MT. Overall, local cereal availability is low, following two consecutive years of below normal cereal production.

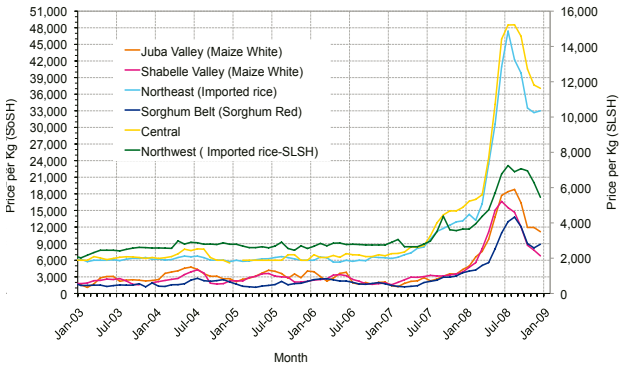
Figure 4: Trends in Annual Cereal Production (1995 - 2008) - Southern Regions



Local Cereal Prices

Prices of locally produced cereals are at all time highs across the country (Figure 5). Combined factors, including consecutive seasons of poor cereal crop production, the devaluation of the SoSh, hyperinflation, and increased demand for local cereals, have all contributed significantly to cereal price increases. Although still significantly above normal price levels, both maize and sorghum prices decreased since July, by 30% and 55%, respectively. In December 2008, the highest maize and sorghum prices were recorded in the Jubas (17,000/kg in Dobley) Beletweyn, Luq and Hudur (10,000/kg). Prices, however, are likely to increase over the coming months due to poor performance of *Deyr* '08/09 season, coupled with overall low cereal availability and increasing demand for local cereals.

Figure 5: Regional Trends in Cereal Prices (SoSh)

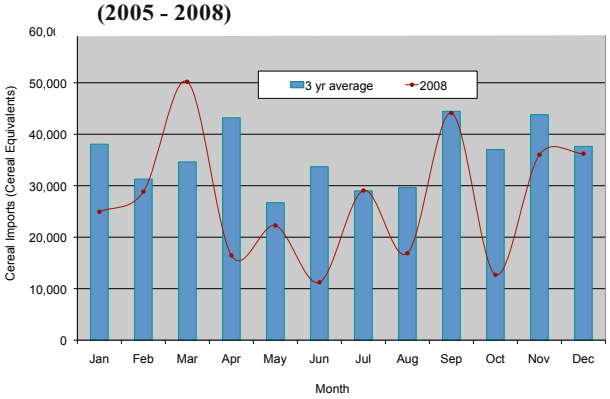


In farming communities in the Juba and Shabelle regions, agricultural activities, related to off-season crop planting in late Sept.-Nov. '08, regular *Deyr* '08/09 production and the projected off-season in late March, created opportunity for agricultural employment and other income-earning opportunities for poor households. Labor opportunities in the Shabelle, Juba, Hiran (Beletweyn), Bay and Bakool regions improved with the increased labour demand for weeding, irrigating, guarding and harvesting as well as the transportation of farm produce. Terms of trade (TOT) between labor and cereals have increased by 85%-130% since July '08 in the southern regions. The highest TOT between cereal and labor were recorded in the Juba and Hiran (Beletweyn) regions (11kg/daily labor wage and 10kg/daily labor rate, respectively), which is significantly above or near the five-year average. The daily labor wage rates in these regions increased in December, while local cereal prices in the last six months of 2008 showed a declining trend (maize 11,000 SoSh and sorghum 9,500 SoSh in Dec. '08). Although the TOT between labor and cereals significantly improved during the last six months of 2008, it was still lower than the long-term average due to sustained inflation.

Cereal Balance Sheet (CBS)

The June 2008-May 2009 Annual Cereal Balance Sheet released in August is updated with current *Deyr* '08/09 cereal production estimates, *Gu/Karan* crop harvest estimates for the northwest, actual commercial imports (June – Dec. 2008), as well as updated information on food aid distribution, stocks and pipeline. Overall, the estimated cereal balance sheet indicates that, without food aid, there could be a significant cereal deficit of between 75,000 and 170,000MT this year. This estimated deficit is due to the combined impact of below normal domestic cereal production and lower levels of cereal imports.

Figure 6: Trends in Commercial Cereal Imports (2005 - 2008)



Commercial cereal import figures indicate a fluctuating trend over the last 12 months. Total cereal imports for 2008, at 328,950MT, are 23% lower than the three-year average (2005-2007). This is mainly a result of the devaluation of the Somali Shilling and increased importation costs due to sea piracy, which has raised shipping costs and taxation (Figure 6).

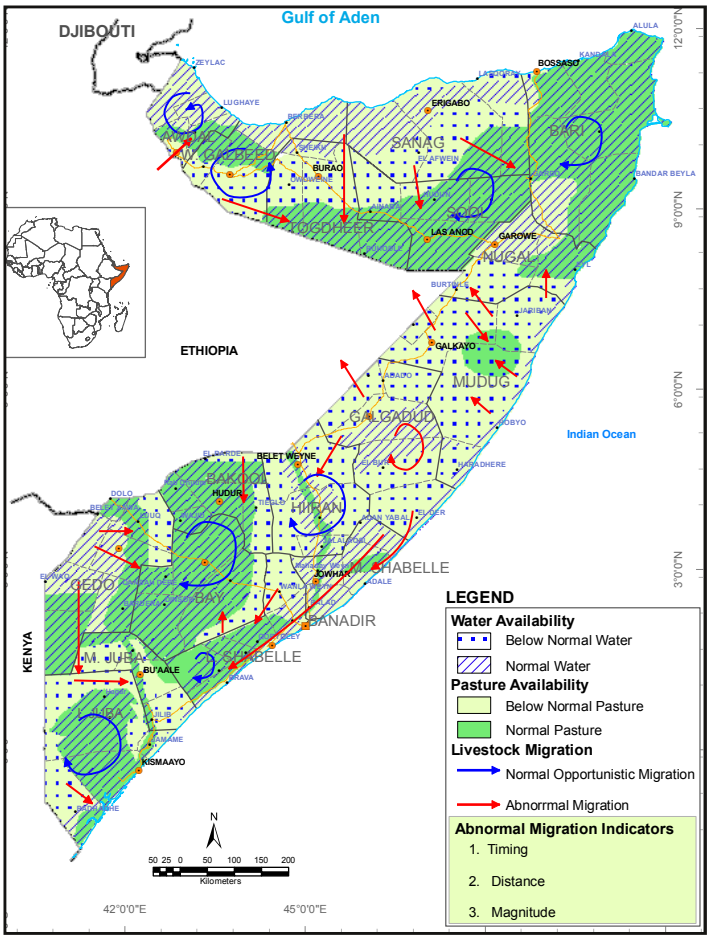
LIVESTOCK

Rangeland and Water Conditions

Rangeland conditions are varied, following the mixed outcome of the *Deyr* '08/09 seasonal rains, as shown in Map 5. Rangeland conditions in the drought-affected areas of Galgadud, Mudug and Hiran regions and the rain-deficit areas of Hawd livelihood zone of Sool, Nugal and Mudug regions and Addun of Mudug, further deteriorated after another poor seasonal rainfall.

Other areas also adversely affected by the poor *Deyr* '08/09 rains include Middle Shabelle, Middle Juba, some areas in Lower Juba, El-Wak district of Gedo, the western Sool plateau of Sanaag, Upper Hawd of Togdheer, and Golis/Guban of the northwest. Most of the pastoral households in these areas have already started to migrate to the neighboring regions, as well as to the Ogaden region of Ethiopia. Poor rainfall during the *Gu* '07, *Deyr* '07/08 and *Gu* '08 seasons, as well as this past *Deyr* '08/09 caused all *berkads*, water catchments, and most shallow wells within the pastoral areas to dry up. The rangeland of Golis of W. Galbeed, Awdal, South Hawd of Togdheer, Bari, eastern Nugal, Bay, Bakool and localized areas of Juba and Gedo regions benefited from normal to near normal *Deyr* '08/09 rainfall, as well as from *Hays* rainfall in the Golis of the northern regions, which improved the water volume of streams and shallow wells and subsequently improved rangeland conditions.

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



Source: FSAU, Jan. 2009

Livestock Migration

Abnormal livestock migration, although reduced when compared to the last six months, is still ongoing in many parts of the country (Map 5). Normal migration patterns are seen in W. Galbeed, Awdal, Sool, Bari, parts of Juba, Bay, Bakool and Lower Shabelle regions. In Galgadud, some livestock out-migrated to the Ogaden region of Ethiopia, as well as to Hiran and Middle Shabelle. However, because of localized rains, which slightly improved pasture and water levels of shallow wells, Addun and Coastal herds remained within the region (Addun areas in between Elbur and Dhusamareb towns). Livestock of western Sool and Golis/Guban livelihood zones of the Sanaag region out-migrated to central Nugal valley, the lower Hawd of Togdheer and Bari regions, while livestock from Middle Shabelle and Wanlaweyn district of Lower Shabelle migrated to parts of southern Lower Shabelle. Dawa livestock migrated to the riverine areas of Gedo region and Southern Inland pastoralists migrated to the Jubas. In Juba, cattle migrated to the Juba riverine and Hola forest of Badade district.

Livestock Body Conditions and Herd Growth

Livestock body conditions are poor due to the overall deterioration of pasture and water conditions in the drought-stricken regions of Galgadud, Mudug, Hiran and Middle Shabelle and the rain-deficit areas of northern Mudug, southern Nugal, and western Sanaag. In contrast, livestock body conditions are average to good in Awdal, W. Galbeed, Bari, Shabelle, Bay, Gedo and Juba regions due to overall improvement of pasture and water conditions. *Deyr* '08/09 season calving/kidding rates for camels, cattle and sheep/goats are low to none in the drought-affected regions of Galgadud, Mudug, Hiran, Bakool and Middle Shabelle, but low to medium in the rain deficit areas of Mudug, Sool and Sanaag. In contrast, in Juba, Bay and Lower Shabelle regions, camel, cattle and sheep/goats calving/kidding rates are medium to high with medium conception rates. In Bari, Sool, Togdheer, Awdal and W. Galbeed regions, camels are not calving, but conception rates are medium to high. Sheep/goats kidding rates, however, are medium with medium to high conception rates.

The FSAU *Deyr* '08/09 pastoral herd dynamics model indicates a decreasing trend in herd sizes when compared to the end of *Gu* '08 season (June'08). For example, in the drought-affected areas of Galgadud, Mudug, Hiran, Middle Shabelle and Bakool, there is a decreasing trend when compared to June '08 herd sizes, (i.e. camel declined by 20%-35%; cattle declined by 18%-20%; and sheep/goats declined by 22%-31%), which is attributed to high death rates, as well as to the additional off-take needed to cover increasing water trucking costs and record high food prices. Herd sizes in these areas are well below baseline levels. Cattle have been the worst affected by the drought and have declined by 47%-53%, when compared to baseline levels.

Similarly, the rain deficit areas of Hawd and Addun of Mudug, Golis/Guban pastoral of northwest, Sool of Sanaag and Dawa pastoral of Gedo livelihood zones are also showing a decreasing trend, although they are at borderline baseline levels. The exception is Sool plateau, where camel herd sizes have not returned to original baseline levels since 2004; however, indications are that this trend reflects a change in pastoral baseline holdings. With the exception of the Sool plateau, camel populations are above baseline levels in all pastoral livelihoods in most of the northwest and northeast regions, as well as in the Southern Inland Pastoral areas of the Juba and Gedo regions. Generally, there are no outbreaks of major livestock diseases. However, cases of CCPP are reported in the drought-stricken regions. Common diseases (i.e. tick born disease and endoparasites) are widely reported in most of the regions.

Figure 7: Regional Trends in Local Quality Cattle Prices (SoSh/SlSh)

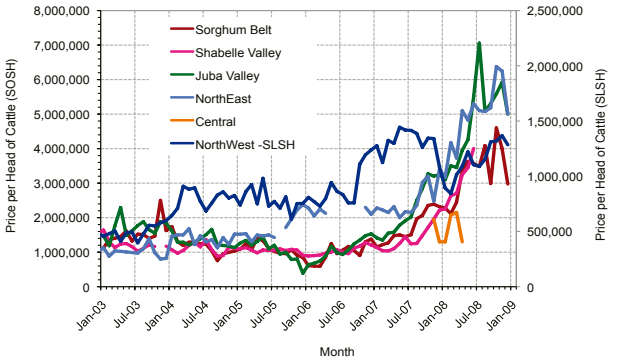
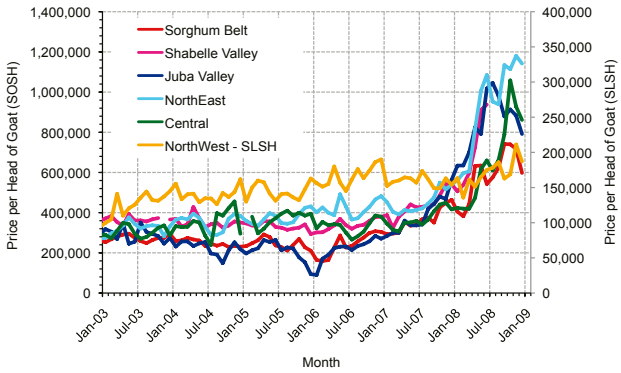


Figure 8: Regional Trends in Local Quality Goat Prices



Livestock Prices and Pastoral Purchasing Power

Generally, prices of all livestock species throughout Somalia have steadily increased since Jan. '07 and are higher than the 5-year average, primarily in response to general inflationary pressure, the devaluation of the Somali Shilling (SoSh), and high demand because of Hajj and Ramadan (Figure 7 and 8). Livestock prices declined slightly in some areas in the last six months.

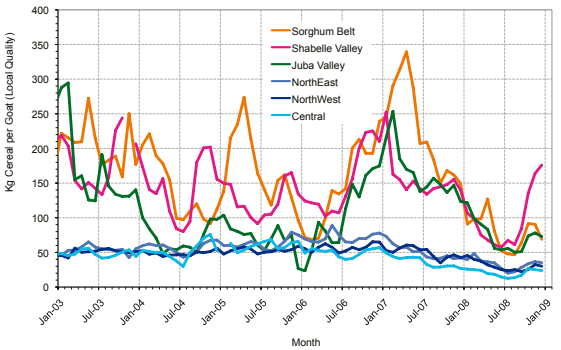
Livestock prices are expected to remain high in response to the SoSh devaluation and to general inflationary trends, as well as to increased demand from both local and external markets. However, drought-affected and rain-deficit areas of Galgadud, Mudug, Hiran, and Middle Shabelle will not benefit from these increases due to the limited number of marketable animals in those areas.There was a slight decline in export quality goat prices in the central, northeast and northwest regions, when compared to November '08; however, prices remain at an all time high, which is attributed mainly to the devaluation of the SoSh and the increase in market demand.

Due to the significant increases in livestock prices and the dramatic decline of cereal prices, pastoralist purchasing power, as measured by the terms of trade (TOT) between livestock and cereal, has considerably increased in all regions, but is still below normal levels of exchange (Figure 9). Average TOT for export quality goat to rice in the central, northwest and northeast regions are 100%, 28% and 74% higher when compared to July '08, respectively. Terms of trade, however, are 11%, 19% and 17% lower than the same month of last year, respectively. This is due to the significant price increases in Dec. '08 of imported rice in the central, northeast and northwest regions (138%, 151% and 49%, when compared to the same period of last year, respectively) and a similar significant increase in local cereal prices in the central and northeast regions (359% and 340%), when compared to the December 5-year average.

Livestock Exports

In the south, cross border cattle trade between Somalia and Kenya continued steadily, due to a strong demand from Kenya. Similarly, in the central and northern regions, overall livestock export volumes for all species were comparable to 5-year average export levels due to increased demand during the Hajj and Ramadan periods and increased livestock prices, which resulted in increased income for pastoralists. However, households of the drought-affected regions of Galgadud and Mudug benefited the least because of limited availability of export quality goats. Livestock exports from Jan. to Dec. '08 through Berbera and Bossaso ports reached 2,668,545 heads, of which 92% were sheep/goats. This is only 1% lower than the Jan.-Dec. '03-07 average (2,699,379 heads).

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



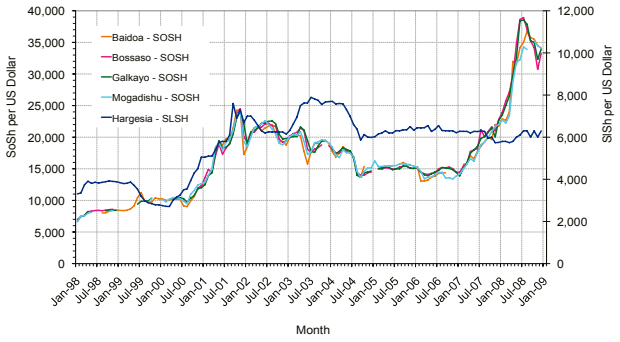
The five abattoirs of the country have fully resumed operating. Beletweyn abattoir was the last abattoir to resume operations, which started mid-November '08. In 2008, a total of 492,497 carcasses were exported to the Gulf countries. Burao and Galkayo abattoirs exported a total of 151,471 and 77,992 carcasses, respectively, which is 115% and 147% higher than 2007 exports (70,318 and 31,639 heads), while the Mogadishu and Beletweyn abattoirs exported 252,979 and 10,055 carcass heads, respectively.

MARKETS

Devaluation of the Somali Shilling

The Somali Shilling (SoSh) has depreciated significantly since early 2007, by 57% in 2007, and by a further 45% in 2008 (Figure 10). This dramatic devaluation is mainly attributed to the uncontrolled and excessive printing of shilling notes starting in early 2007, combined with a loss of confidence in the local currency. However, since Oct. '08 the currency has begun to appreciate. A FSAU/FEWSNET Somalia Money Vendor Survey, conducted in the post *Deyr* '08/09 assessment, concluded that this appreciation is due to the increased circulation of US dollars from increased livestock export sales and piracy, combined with the cessation of money printing. Although the currency appreciated in the last few months, it is still at record levels of devaluation. In contrast, the Somaliland Shilling remained relatively stable and is at the same level of exchange as in 2005.

Figure 10: Trends in Exchange Rates - SOSH and SLSH to USD



Commercial Import Commodity Prices

Imported commodity prices remain at record high levels, even with large decreases since Oct. '08 (Figure 11). Much of the hyperinflation has been driven by the devaluation of the SoSh, which made it costly to purchase imports. Hyperinflation is only partly attributed to rising global prices. Since 2007, rice price increases in Somalia have generally correlated with international trends; however, price increases in Somalia have not only exceeded international increases, but the relative price differential has significantly increased over the last six months (Figure 12). When comparing international rice prices with Mogadishu retail rice prices, the average price differential was .26 kg/USD between Jan. '07 and March '08. This increased to an average price differential of .61 kg/USD between June '08 and Dec. '08.

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

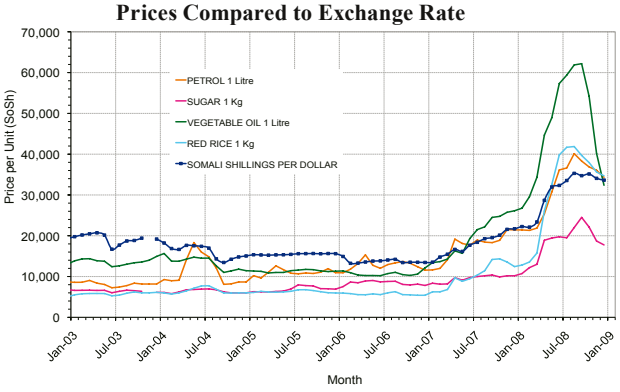
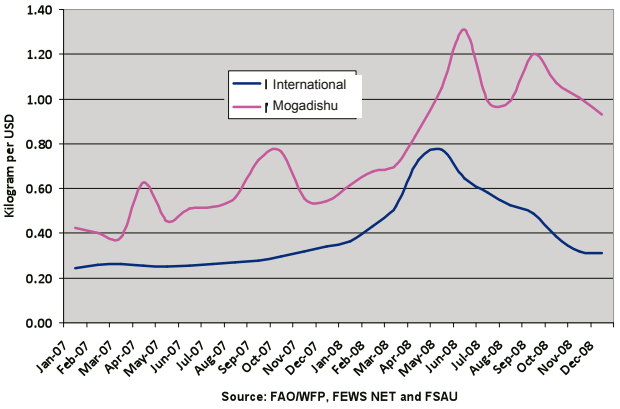


Figure 12: Comparison of Mogadishu and International Rice Prices from Jan. '07 to Dec. '08

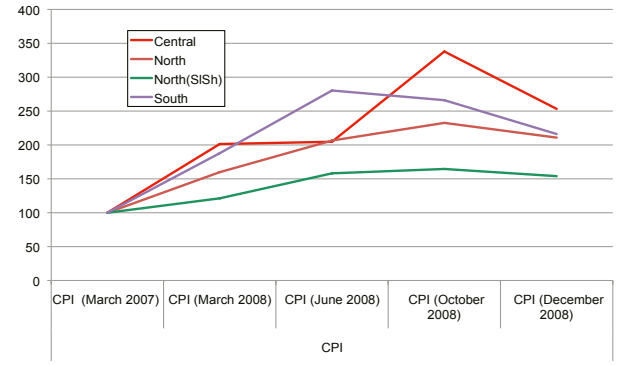


The compounding macro-economic factors of a weakened SoSh, increased importation and shipping costs due to piracy, below normal domestic cereal supplies and an overall cereal supply deficit are not only continuing to keep food prices high in Somalia, but are also widening the price differential between food prices in Somalia and global food prices.

Cost of Living Increases

Hyperinflation is making it difficult for households, especially the poor, to meet their basic survival needs in terms of food and non-food items. To measure and monitor inflation as it relates to the urban poor, FSAU developed an urban poor minimum expenditure basket (MEB) and consumer price index (CPI).[1]

Figure 13: Regional CPI Trends



The urban poor CPI indicates significant increases in the cost of the minimum expenditure basket (CMB) over the last 18 months (Figure 13). By March '08 the average CMB, or CPI, was 160-201% of the cost in Mar. '07, and by October '08 it was between 233-338%. This doubling and tripling of the average CMB is largely attributed to increased sorghum prices, as cereal constitutes the largest proportion (50-60%) of the urban poor MEB. The highest rates of increase in the CPI, 338% and 280%, occurred in the central and southern regions.

1 See FSAU Technical Series Report: Post Deyr '08/09 Analysis, Feburary 28, 2009 for full description of the MEB and CPI.

NUTRITION SITUATION OVERVIEW

An integrated analysis of the nutrition information collected from July to December 2008 indicates a varied nutrition situation throughout the country, with many parts continuing to report emergency levels of acute malnutrition (Map 6). A combination of a deteriorating food security situation in parts of the country, continuing displacement caused by insecurity, uncontrolled disease outbreaks and a fundamental lack of basic services, has increased the population's nutritional vulnerability and reduced resilience to cope with the ongoing shocks.

A total of 17 representative nutrition assessments were conducted by FSAU and partners from October to December 2008 (Figure 14[2]). From these assessments, eight reported global acute malnutrition (GAM) rates below the emergency threshold of 15%, three reported rates between 15-19.9%, with the remaining six reporting rates ≥20%. The rates of severe acute malnutrition (SAM) were also unacceptably high with six surveys reporting above 4%, six between 2-4% and the remainder below 2%. However, crude and under five-year mortality rates remained below the respective emergency thresholds of 2 and 4 deaths per 10,000 population per day for all the assessments, but elevated levels were reported in the Golis/Guban assessment in the northwest regions, Bossasso IDPs, Hawd livelihood, Shabelle riverine and Juba region surveys.

The rural areas of most concern illustrated in red in the map are the Golis/ Guban livelihood in the northwest regions, Hawd Livelihood in the Central regions bordering Ethiopia, Bakool region and Gedo regions. For IDPs, their nutritional situation is also of great concern, with the highest rates of acute and severe malnutrition in 2008 reported in Bossasso IDPs in December. Other protracted IDP populations in Galkayo, Garowe, Hargeisa, Berbera and Burao are also facing chronically high levels of acute malnutrition, undoubtedly exacerbated by the urban food price crisis, given their reliance on purchase for food access.

Map 6: Somalia Estimated Nutrition Situation Jan. '09

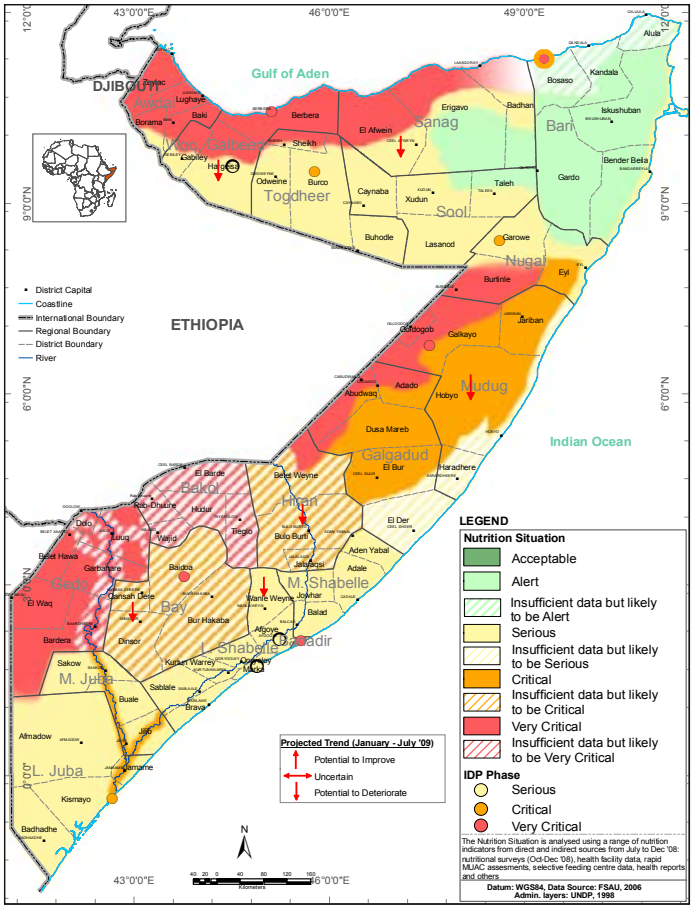
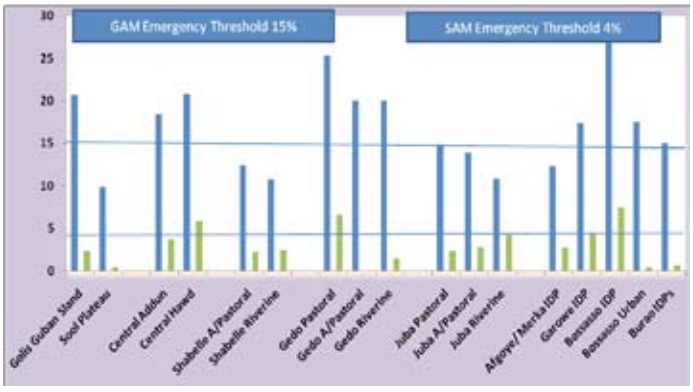


Figure 14: Somalia Estimated Nutrition Situation, Jan. '09



Based on the integrated analysis conducted**,** nutrition survey results and the application of median rates, an estimated 200,000 children under 5 years of age are thought to be acutely malnourished, of which 60,000 are estimated to be severely malnourished and at increased risk of mortality if they do not receive appropriate treatment[2]. This means 1 in 6 children in Somalia is acutely malnourished and 1 in 20 is severely malnourished. These proportions remain similar to the *Gu* '08, but are elevated from the *Deyr* '07/08 numbers. Due to population density, a third of these children are in the Shabelle regions, followed by the Galgadud, Mudug and Bay regions. Of greatest concern is the deteriorating nutritional situation in the Galgadud and Mudug regions, where there are an estimated 10,000 children in need of immediate therapeutic care, yet ongoing insecurity prevents them from accessing appropriate care.

A summary of the key findings are presented in the regional sections below, with detailed analysis by region and livelihood provided in the *FSAU Technical Series Report: Nutrition Update, Oct.-Dec. '08.*

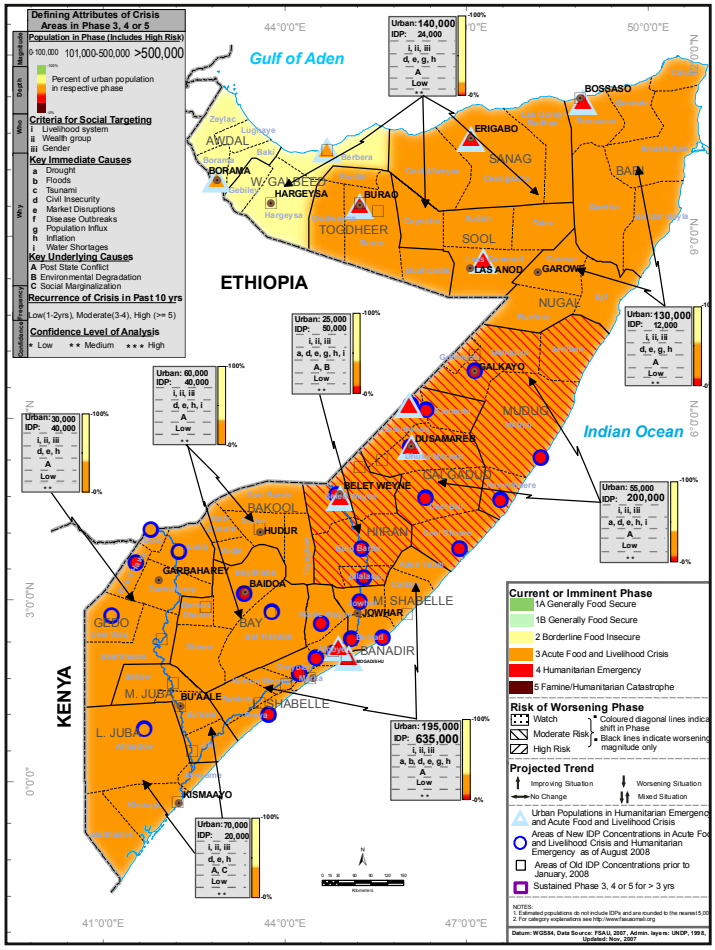
2 Nutrition survey results reported using NCHS values for GAM and SAM.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

For the first time in over 15 years, a significant number of people in crisis in Somalia are the urban poor, who are continuing to struggle and cope with hyperinflation of food prices. With no significant change in the food security situation since *Gu* '08, roughly 25% of Somalia's urban population, or 705,000 people, remain in need of humanitarian assistance (Map 8). Of this total, 565,000 people are in **Acute Food and Livelihood Crisis (AFLC),** requiring emergency livelihood support, while another 140,000 are in **Humanitarian Emergency (HE),** requiring livelihood and life saving emergency assistance. In addition, the number of people internally displaced around the country has significantly increased due to recent conflict, from 870,000 in *Gu* '08 to 1,020,000; these people have also been negatively impacted by the hyperinflation.

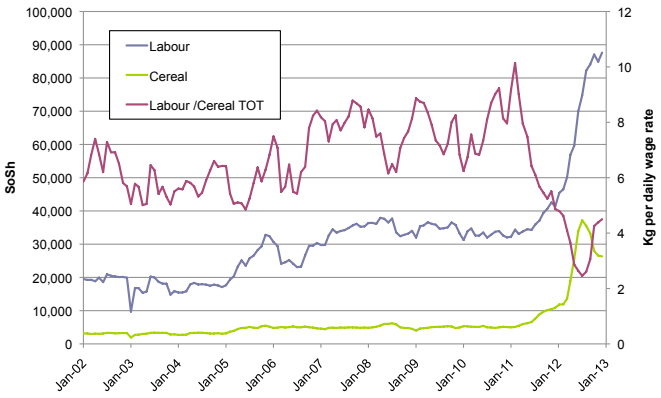
Map 8: Urban Populations, Projections Jan. - June '09



Source: FSAU, Jan. 2009

The urban poor continue to struggle to meet their basic food and non-food needs due to record high food prices. From 2007 to 2008, the prices of imported rice and local cereals have increased between 230% and 350%, which significantly exceeds global cereal price increases. Although prices declined slightly from Oct. '08, providing some benefits, they are still 450-780% above the long-term average ('97-'05) and thus still at record highs. The average cost of the urban poor minimum expenditure basket (CMB), or the consumer price index (CPI), has more than doubled since Mar. '07, with the largest increases in the south and central regions, at 280% (June '08) and 338% (Oct. '08).

Figure 15: Central, South, Northeast Average Wage Rate, Cereal Price and Terms of Trade Cereal to Labour



The purchasing power of poor urban households has declined since 2007, as income levels have not kept pace with the rising food and non-food prices. The urban poor derive a significant portion of their income from unskilled labour. Four rounds of FSAU urban assessments over the last year, combined with market analysis, indicate that hyperinflation in commodity prices has had an inflationary impact on income, through rising wage rates (Figure 15). However, although unskilled labour wage rates increased steadily from Mar. '07 to Dec. '08, by approximately 110-130%, the increases have been insufficient in matching the hyperinflation in food prices, and purchasing power is still significantly lower than normal.

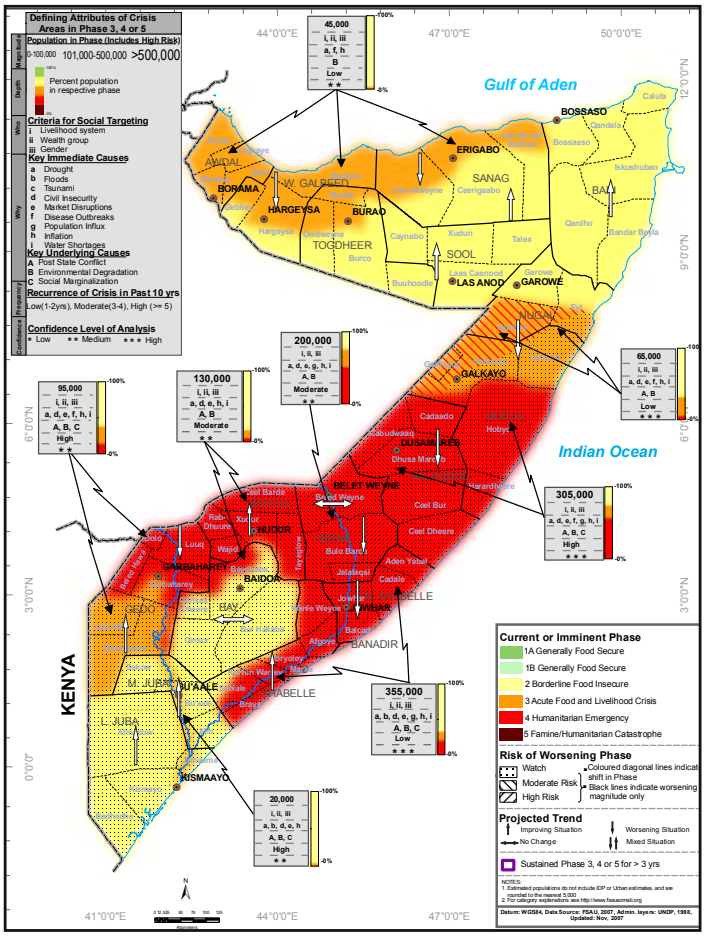
With income unable to match basic food and non-food price increases, the urban poor have had to seek additional financial support, in the form of cash gifts, loans and remittances, to meet their basic food needs. For instance, from Mar. '07 to Dec. '08, remittances and cash gifts received by the urban poor increased by 159% and 565%, respectively. By Dec. '08, financial assistance was covering between 15-35% of the CMB for many of the urban poor throughout the northeastern, central and southern regions. In addition to seeking financial assistance, households have also adopted a number of other distress coping strategies in order to deal with the crisis; these include purchasing cheaper cereals, skipping whole meals and borrowing food from neighbours. The percentage of urban poor households employing one or more of these coping mechanisms increased from 32% in Oct. '07 to 59% in Oct. '08. The increased inability to cope has resulted in reduced levels of dietary diversity, as 20-60% of the poor urban households were reported to have consumed less than four food groups per day in Oct. '08.

Although prices have decreased slightly over the last three months, record high prices will continue to undermine the urban poor's ability to access basic food and non-food items. If the situation does not improve, urban populations will exhaust many of their coping options. Already urban poor households are deeply indebted and becoming more impoverished, thus increasing their vulnerability to shocks and other crises.

RURAL

The post *Deyr* '08/09 livelihood based integrated food security analysis indicates a continued acute humanitarian crisis for 1,215,000 rural people in Somalia (Map 9). The number of people in **Humanitarian Emergency (HE),** 680,000, is significantly greater than the number in **Acute Food and Livelihood Crisis** (**AFLC)**, 535,000, which is indicative of a deepening crisis. The severity of the crisis is deteriorating in many areas, specifically in Galgadud, Mudug, Hiran, north Gedo and Middle Shabelle regions. In these areas between 50-70% of the rural population are either in **AFLC** or **HE**. There are improvements in some areas, notably in Juba and Lower Shabelle regions, as well as in the three main pastoral livelihoods of Hawd, Sool and Nugal Valley in the north. The Integrated Food Security Phase Classification Evidence Templates for each of the regions by livelihood zone are available on the FSAU website.

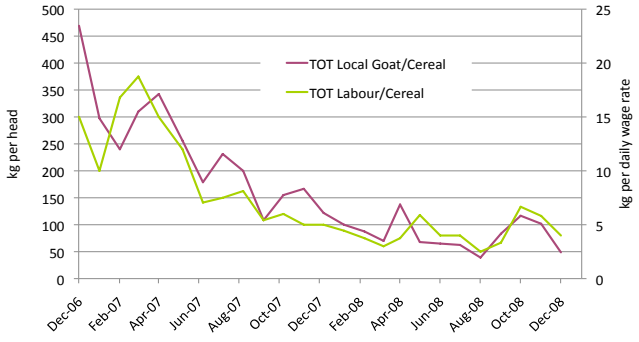
Map 9: Rural Populations, Projections Jan. - June '09



Gedo

The overall food security situation varies between the north and the south, although there is slight improvement in parts of the south, particularly Bardera and some areas of El Wak district. The situation has further worsened in the north, due to poor *Deyr* '08/09 rains, below normal crop production, high cereal prices, and weakened purchasing power. The number of people in **Humanitarian Emergency (HE)** increased to 35,000 people from 21,000 during *Gu* '08, while the number of people in **Acute Food and Livelihood Crisis** (AFLC) dropped from 78,000 people to 60,000 people in *Deyr* '08/09. In addition, there are 30,000 urban poor people, who are currently in **AFLC** due to sustained hyperinflation (Table 1 and Map 9).

Figure 16: Gedo (Luq) Terms of Trade, Local Goat and Labor to Cereal (Maize)



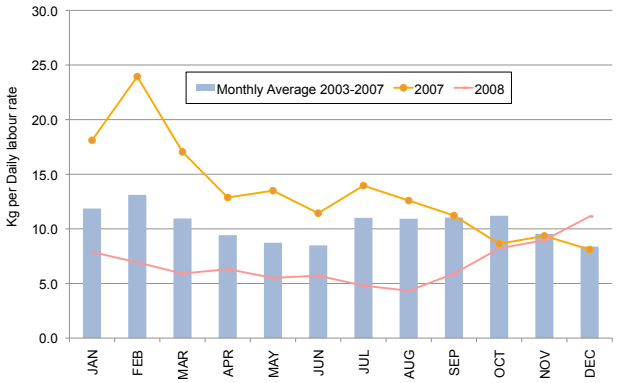
Crop production, rangeland conditions, and livestock production are poor in most of the region, as a result of significantly below average *Deyr* '08/09 rains. Exceptions are, however, Bardera and southern El Wak districts. Bardera is benefiting from improved rangeland conditions, good cereal crop production (87% of the total region cereal production), as well as good cash crop production and labour opportunities. In southern El wak district, rangeland conditions have improved, leading to improved livestock body conditions and livestock conception rates. As a result of consecutive seasons of poor rainfall, *Deyr* '08/09 season calving/kidding rates as well as milk production remain poor throughout most of the region, although medium to high calving rates of goat are anticipated in March-April '09, especially in southern Gedo. Livestock herd growth remains poor with herd sizes still significantly below baseline levels throughout most of Gedo. Due to low cereal production, labour opportunities have decreased and as a result, income is limited, except in the riverine areas of Bardera district, where *Deyr* '08/09 maize production is fairly average. Although cereal prices have declined since Oct.'08, they are still high when compared to last year as well as to the 5-year average. In some markets, livestock prices are the same or above last year's average and the 5-year average. However, purchasing power remains very low and below last year's average as well as the 5-year average, as the TOT for goat to cereal has worsened (less than 50kg/ local quality goat) and the labour to cereal TOT has not improved (Figure 16). Civil insecurity over the last three months is an additional factor negatively impacting food access.

An integrated analysis of information from nutrition assessments conducted in Gedo in Dec. '08 and health information and feeding facilities' data, indicates a ***Very Critical*** nutrition situation across all the livelihoods in the region. This illustrates a sustained crisis in the pastoral and riverine populations and a deterioration for agro-pastoral populations over the last six months. Of great concern is the elevated severe acute malnutrition (SAM) rate of 6.6%, reported amongst pastoral populations. The worsening nutrition situation is partly attributed to successive seasons of poor crop production, low milk production, hyperinflation, increased food prices, increased civil insecurity, and the resultant decline in food availability and access, as well as poor child care practices. Ongoing localized insecurity has severely disrupted delivery of humanitarian assistance, including access to selective feeding centres for the severely malnourished children.

Lower and Middle Juba

The food security situation of the rural populations in the Juba regions has continued to improve since *Gu* '07. It is estimated that 20,000 riverine rural poor in Lower and Middle Juba regions (10,000 people each) are in **Acute Food and Livelihood Crisis (AFLC),** which is 31% of the affected riverine population in *Gu* '08. The 7,000 riverine people who were previously in **HE** are now in **AFLC**. The 12,000 agro-pastoral and 2,000 pastoral people who were in **AFLC** in *Gu* '08 are currently **Borderline Food Insecure (BFI)**. Although there is improvement in the situation for rural populations, the urban poor continue to struggle with hyperinflation and 70,000 remain in **AFLC**. (Table 1 and Map 1)

Figure 17: Juba Terms of Trade, Labor to Cereal (Maize)



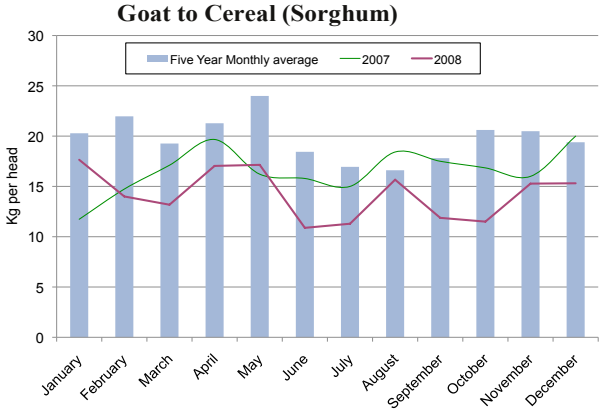
The food security situation is improving for rural populations due to a combination of factors. Cereal production levels and labor opportunities improved as a result of the *Gu* '08 and *Deyr* '08/09 seasonal production and two off-season cropping periods (Sept.-Nov. '08; expected March-April '09). Total cereal production from these four periods is estimated at 18,350 MT, which is 90% of the PWA annual production. Cereal stock availability analysis in the Juba regions indicates that stocks could last up to six months, depending on the district. All the *desheks* have replenished, which is providing an abundance of wild foods, opportunities for fishing, as well as cash crop production. Terms of trade (TOT) between labor and cereal have increased by 130% since July '08. The highest TOT between labor and cereal in southern Somalia were recorded in the Juba regions at 11kg/daily labor wage, which is 30-35%, above the 5-year average and the Dec. '07 TOT. This is due to a significant increase in daily labor wage rates in Dec. '08 (130,000 SoSh) and a considerable decrease in local cereal prices in the last six months. However, although the TOT significantly improved in the last six months, it is still lower than the long-term mean. Agro-pastoral and pastoral households are benefiting from improved pasture and browse in most parts of the hinterland, and good livestock body conditions and production, as herd sizes for all livestock species are above baseline levels (Figure 17).

The integrated nutrition situation analysis post *Deyr* '08/09 indicates an improvement amongst agro-pastoral populations from ***Critical*** levels recorded post *Gu* '08 to ***Serious*** levels post *Deyr* '08/09, with the exception of a sustained ***Serious*** phase amongst pastoral populations since *Gu* '08. Mitigating factors include increased access to milk (from own livestock as well as from livestock migrating into the Jubas from other regions), increased access to fish in flooded areas and increased income from additional labour opportunities. For the riverine populations, although acute malnutrition rates were below the emergency thresholds, elevated rates of severe malnutrition have kept this population in a ***Critical*** nutrition situation. Limited access to safe water and sanitation facilities as well as to health services prevent the population from recovering from the nutrition crisis. Kismayo IDPs have been a sustained ***Critical*** phase since the *Deyr* '07/08.

Bay and Bakool

The food security situation in all livelihoods in Bakool slightly improved. The situation in Bay region remains **Borderline Food Insecure (BFI),** except for areas of northern Baidoa, where there was further deterioration following consecutive seasons of crop failure. For some agro-pastoralist households in these localized areas, the situation has deteriorated from **Acute Food and Livelihood Crisis (AFLC)** to **Humanitarian Emergency (HE)**. In Bay region, 4,000 and 1,000 people are now in **AFLC** and **HE**, respectively. In Bakool, the total number of people in **Humanitarian Emergency (HE)** and **Acute Food and Livelihood Crisis (AFLC)** decreased by 16%, to 45,000 people in **HE** and 80,000 people in **AFLC**. In addition, due to sustained hyperinflation, about 60,000 of Bay and Bakool's urban population remain in a state of **AFLC** (Table 1 and Map 1).

Figure 18: Bay and Bakool Terms of Trade, Local Goat to Cereal (Sorghum)



Good *Deyr* '08/09 rains in Bakool resulted in improved crop and rangeland conditions. *Deyr* '08/09 production is above both the post-war and 5-year averages, except in some small pockets (see Agriculture and Livestock Sector). Rangeland conditions and livestock body conditions have improved with medium to high livestock conception rates for all species; livestock out-migration levels are also low. However, livestock herd sizes among pastoralists and

agro-pastoralists remain significantly below baseline levels due to several seasons of dry conditions and high levels of livestock off-take. In the Bay region, due to the mixed performance of rains, *Deyr* '08/09 cereal production is below the post-war and 5-year averages. However, despite the low production, available stocks exceed cereal consumption requirements in the region and will provide opportunities for sale over the next six months. Cereal prices, although still at record high levels, have been falling since July, thus improving the purchasing power of pastoralists and agro-pastoralists (Figure 18). Despite these improvements, however, food access for many poor households in the affected areas of Bakool and northern Baidoa district will remain critical over the next six months.

Although no nutrition assessment has been conducted recently in the Bakool and Bay regions due to civil insecurity, an integrated analysis of available nutrition information indicates that Bakool's agro-pastoral and pastoral populations are likely to be in a ***Very Critical*** phase and Bay's agro-pastoralists are likely to be in a ***Critical*** phase. In Bakool, findings from rapid MUAC assessments conducted in Dec '08 in the agro-pastoral and pastoral livelihood zones reported high proportions (22% and 16.6%) of acutely malnourished children with MUAC <12.5cm or oedema. Data on selective feeding admissions of severely and moderately malnourished children shows high numbers with fluctuating and increasing trends in Wajid and Tieglow districts over the last two months. Health facilities data has shown high levels and an increasing number of acutely malnourished children in the last three months. In Bay, findings from a rapid MUAC assessment conducted in Dec '08 indicate a high (17.7%) proportion of acutely malnourished children and 2% with MUAC <11.0cm or oedema. The HIS data from health facilities shows an increasing trend with a high proportion of acutely malnourished children in Baidoa, Berdale and Qansahdere district. Access to SFP services is available but limited in rural areas. The SFP data in the feeding centres shows high levels of admission.

Lower and Middle Shabelle

The food security situation in the Shabelle regions (Middle and Lower Shabelle) is mixed, with the Lower Shabelle region showing some improvement, and the Middle Shabelle region experiencing further deterioration. In the Shabelle regions, a total of 465,000 people are in a state of **Humanitarian Emergency (HE)** and **Acute Food Livelihood Crisis (AFLC),** with an early warning level of ***Watch*** in Lower Shabelle and a moderate risk in Middle Shabelle over the coming six months; this is a 21% decrease since post *Gu* '08. Of the total affected, 235,000 people are in **HE** (11% decrease since July '08) and 230,000 are in **AFLC** (28% decrease since *Gu* '08). In Middle Shabelle, of the 260,000 people that are in **AFLC** or **HE**, 67% are agro-pastoral; 7% are riverine; 10% are pastoral, and 12% are urban poor. In Lower Shabelle, the majority, or 40%, of those affected are urban poor; 36% are agro-pastoral; 10% are riverine; and 4% are pastoral. Of the Shabelles' total urban population, 15,000 remain in **HE**, while another 95,000 are in **AFLC**, with an early warning of **Watch** (Table 1 and Map 1).

Women transporting off-season maize harvest, Qorioley, Lower Shabelle, Oct. '08.

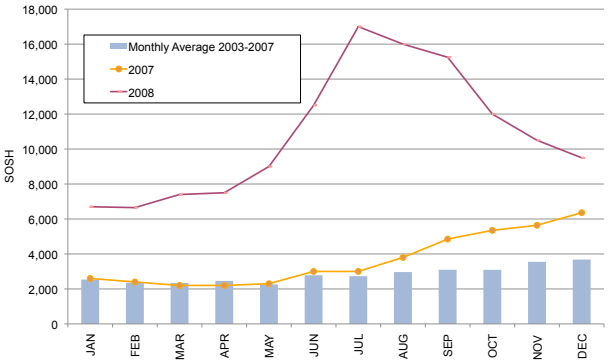
There is a further deterioration for rural populations in Middle Shabelle due to a number of factors, including a severe *Deyr* '08/09 rainfall deficit, following poor *Gu* '08 rainfall, several seasons of below normal crop production (*Deyr* '08/09: 46%; *Gu* '08: 32%; *Gu* '07: 46%; and *Deyr* '06/07: 51% of PWA), high input costs, persistent hyperinflation and a severe depletion of pasture, which caused livestock out-migration. In addition, escalated civil insecurity has led to a greater IDP influx from urban towns to the regions' rural areas, which continues to strain already limited rural resources. Household food stocks have depleted due to consecutive crop failure. Although the purchasing power (labor to cereal TOT) of poor households increased slightly over the last three months in most areas (average of 6 kg/daily wage rate in Dec. '08), it is still lower than the Jan. '07 TOT, which was 13 kg/daily wage rate. It also significantly reduced in Adanyabaal market, from 5kg cereal/daily wage rate in July '08 to just 1kg/daily wage rate in Dec. '08.
In Lower Shabelle, although the *Deyr* '08/09 crop production is below average (36% of PWA), the food security situation improved due to a combination of *Gu* '08 seasonal cereal production (33,000MT), *Deyr* '08/09 production (13,000MT), and a significant off-season crop harvest in Oct. '08 (18,500MT). The TOT between labour and maize has improved since July '08 by 100% in the main riverine markets in Lower Shabelle due to improved labour opportunities, an increase in labour wage rates and a decrease in local cereal prices.

The nutrition situation has shown significant improvements amongst agro-pastoral and IDP (Merka-Afgoye corridor) populations from ***Critical*** in *Gu* '08 to ***Serious*** in the *Deyr* '08/09. The riverine population has remained in a sustained ***Serious*** phase since *Gu* '08. Humanitarian interventions (including food and cash transfer, and increased access to safe water and sanitation), a favourable off-season harvest and increased access to fish, fruits and vegetables have mitigated the previous ***Critical*** nutrition situation. Nevertheless, high incidences of morbidity and civil insecurity

remain aggravating factors to the sub-optimal nutrition situation. Of concern are the sustained elevated number of oedema cases, especially amongst IDPs (1.0%) and riverine (1.1%) populations, and the continuing displacement of vulnerable households from Mogadishu, which has placed pressure on host communities. In Mogadishu, the nutrition situation is likely to be ***Very Critical*** based on an integrated analysis of key outcome evidence, with no notable change over the last two years.

Hiran

Figure 19: Hiran Region, Trends in Sorghum Prices



The overall food security situation in Hiran region has been deteriorating since *Gu* '08. Consequently, the number of people in **Humanitarian Emergency (HE)** in rural areas has increased from 113,000 people to 135,000 people, which is an increase of 19**%.** The number of people in both **Acute Food and Livelihood Crisis (AFLC)** and **HE** has also increased since *Gu* '08 and currently stands at 200,000, representing 75% of the region's rural population, with approximately 68% in **HE** and 32% in **AFLC**. Factors that have contributed to the serious deterioration include poor crop production, resulting from below normal *Deyr* '08/09 rains (67% of the LTA), recurrent conflict in both urban and rural areas, and disruption of trade and economic activities. The worst affected livelihood zone is the agro-pastoral LZ, where 75,000 people are now in **HE** and 37,000 in **AFLC.** This is followed by Riverine LZ, where 27,000 people are in **HE.** Since July '08, the humanitarian situation in Hawd and Southern Inland Pastoral LZs has remained the same: 22,000 people and 9,000 people are in **HE**, respectively. The urban poor continue to struggle to meet their basic food and non-food needs due to record high food prices. The urban populations affected have remained the same since July '08;20,000 people are in **AFLC**, and 5,000 are in **HE** (Table 1 and Map 1).

Cereal production is estimated at 4,500MT, which is 188% of *Deyr* '07/08 production, 67% of PWA (1995-2007) and 89% of the 5-year average (2003-2007). The majority of this production (75%) is from Beletweyn district, which benefited from pump irrigation and depressed seasonal river (*wadi*) irrigated crop production. Compared to Dec. '07 and Dec. '08 prices, and the 5-year average, cereal prices increased, but show a declining trend from July '08 to Dec. '08. Terms of trade **(**TOT**)** between labor to cereal show a slight improvement of 107% and 45% in December '08, when compared to July '08 and December '07, respectively, but are still low when compared to the 5-year average. A fourth consecutive season of crop failure in both Bulo Burti and Jalalaqsi district led to a significant food deficit in the majority of rural and urban communities. Moreover, a lack of income earning opportunities, a reduced number of marketable animals and continuous repayment of accumulated debts continue to curtail both urban and rural households' ability to buy food.

The nutrition situation for all the livelihoods in Hiran indicates a likely sustained ***Critical*** phase since the *Gu* '07. Although there is a lack of representative survey data to make a definite classification, the existing data suggests that the situation is unlikely to have changed from *Gu* '08. Screening data from health facilities continues to indicate high numbers of acutely malnourished children, with mixed trends: declining in agro-pastoral areas, stable in pastoral areas and increasing in the riverine, with a relative risk of further deterioration amongst the riverine populations. Data from INGO run Selective Feeding Programmes in Bulo Burti also show an increasing number of admissions. The ***Critical*** nutrition situation in Hiran is mainly attributed to a sustained food security crisis, high levels of chronic nutritional vulnerability and limited humanitarian access.

Central

The overall food security situation in the drought-affected central (Galgadud and Mudug) regions has deteriorated even further since *Gu* '08. The depth of the crisis is severe, with an estimated 350,000 rural pastoralists and agro-pastoralists and 55,000 urban inhabitants in either **Acute Food and Livelihood Crisis (AFLC)** or **Humanitarian Emergency (HE**). More than half the total population of the two regions is in crisis. Furthermore, there are another 200,000 IDPs, a result of increased civil insecurity in the Shabelles and within the parts of the central regions. The number of people in **HE** increased in the Addun, Hawd, Coastal Deeh and the Cowpea Belt LZs, and there is an early warning of a moderate risk of deterioration in terms of the number of people in **HE** before the end of June '09. Since *Gu* '08, the number of people in **HE** has increased by 41% (from 117,000 to 165,000) in Galgadud and by 27% (from 55,000 to 80,000) in southern Mudug. This deterioration is due to poor *Deyr* '08/09 rainfall performance, which deepened the drought, and widespread civil insecurity, which led to increased numbers of IDPs (increase of 5,000 people). Of particular concern is the recent displacement from Dhusamareb and Guricel towns, resulting from increased fighting between religious groups in those areas. (Table 1 and Map 1)

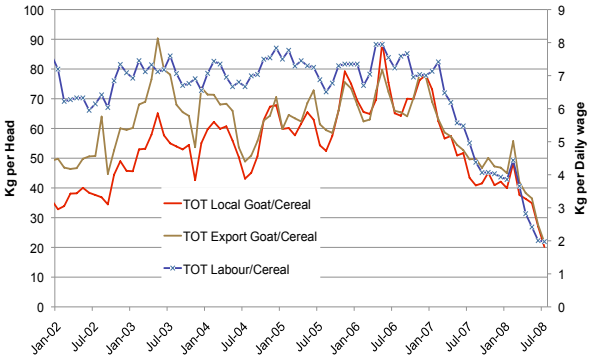
Poor camel body conditions, Dhusamareb, Dec. '08

In the central regions, below average *Deyr* '08/09 seasonal rains (50% of the normal), combined with previous successive seasonal failures resulted in a further deterioration of rangeland conditions (water and pasture). Livestock body conditions (big ruminants) and production remain very poor, and livestock herd sizes are now significantly below baseline levels. In the agro-pastoral areas of the Cowpea Belt, there was a complete crop failure during the *Deyr* '08/09 season, which compounded the effects of previous successive below average seasons. Cereal prices are at record high levels and the highest in all of Somalia. Although the terms of trade (TOT) between goat and cereal has improved in the last six months, the number of people benefiting from the improved purchasing power is significantly low due to high levels of livestock asset losses caused by drought. There are very few marketable livestock and households continue to rely on distress coping options such as buying on credit.

The FSAU Post *Deyr* '08/09 integrated nutrition analysis indicates a very alarming nutrition situation in the two main pastoral livelihoods in the central regions. The Hawd pastoral livelihood has deteriorated to ***Very Critical*** from the ***Critical*** phase post *Gu* '08, as predicted. This deterioration is due to a combination of factors, including the continuing food security crisis, ongoing displacement, a severe and, as of yet, uncontrolled Acute Watery Diarrhoea (AWD) outbreak, and a complete lack of access to basic services and humanitarian assistance for affected populations. The Addun pastoral livelihood has reported a persistent ***Critical*** nutrition situation, with risk to deteriorate further, due to worsening food security indicators and lack of humanitarian assistance. The current analysis estimates that there are 10,000 severely malnourished children less than 5 years of age in the Galgadud and Mudug regions, who are at risk of death, if they do not receive the appropriate treatment. However, due to shrinking humanitarian space, essential life-saving operations have been scaled down and needs are not being met.

Northeast

Figure 20: Northeast Terms of Trade Local Goat, Export Quality Goat and Labour to Cereal (Rice)



In the northeast, the food security situation of pastoral populations in southern Nugal and northern Mudug regions has deteriorated further since *Gu* '08, due to another poor seasonal rainfall performance (Deyr '08/09 is 20-40 % of the long-term average) and persistent hyperinflation. The number of people in Hawd Pastoral of Mudug and Nugal regions in **Acute Food and Livelihood Crisis (AFLC)**,with a moderate risk to **Humanitarian Emergency (HE**), has increased since *Gu* '08. Addun pastoralists, who were **Borderline Food Insecure (BFI)** with moderate risk of **AFLC** during *Gu* '08, are now in **AFLC**. The urban poor continue to struggle with hyperinflation and an estimated 130,000 remain in **AFLC** throughout the northeast, with the exception of Bossasso town, where there is a portion of the urban poor who are in **HE**. The total population in **AFLC** and **HE** in northeastern regions of Bari, Nugal and northern Mudug is 195,000, of which 130,000 are urban inhabitants and 65,000 are rural pastoralists. Of the total number affected, 81% are in **AFLC** and 19% are in **HE**. In addition, there are both newly displaced and protracted IDPs that are in need of humanitarian assistance. (Table 1 and Map 1)

Pasture and water remains very poor in Hawd and Addun pastoral of Mudug and Nugal regions due to three successive poor seasons of rainfall (*Deyr* '07/08, *Gu* '08 and *Deyr* '08/09). As a result, most *berkads* are empty and many *berkads* and boreholes need repair. Water shortages have led to early water trucking and water prices are increasing (from 3,000-4,000 SoSh/20 ltr in Dec. '08). Most of the remaining pastoralists of Hawd migrated to the Ogaden region of Ethiopia, while Addun pastoralists of Jariban district migrated to Hawd of Eyl district. Pasture and browse in Sool, Nugal Valley and Hawd of Eyl district were fully regenerated due to the normal to good *Deyr* '08/09 rainfall that attracted the livestock of the neighboring livelihoods. Both imported and local cereal prices remain at record highs, even though they have declined since July '08. Many households, especially the poor, have switched from imported rice to cheaper local cereals to reduce costs. Prices of maize and sorghum, however, dramatically increased by 146% (maize) and 104% (sorghum) from Dec.'07 to Dec.'08 and are 190% and 179% higher than the Dec. 5-year averages, respectively. The purchasing power of both pastoralists and urban communities has further declined. Terms of trade (TOT) between local quality goat and rice is 17% lower than the Dec. '07 TOT (from 42.11kg/head to 35.15kg/head) and 45% lower than the 5-year average. One export quality goat fetches 38.11kg of rice, which is 19% lower than

Dec. '07. The TOT between labour and cereal is 19% lower than Dec. '07 and 51% lower than the Dec. 5-year average. The integrated nutrition situation analysis post *Deyr* '08/09 recorded no major changes in the nutrition situation in most of the livelihoods of the northeast regions from post *Gu* '08 except for the Hawd livelihood zone (Mudug and Nugal regions), which has deteriorated from ***Critical*** in the *Gu* '08 to ***Very Critical***, and Golis/Gagaab livelihood zones, which have improved from *Serious* in the *Gu* '08 to an ***Alert*** phase. The Addun livelihood zone has been in a sustained ***Critical*** phase since the *Gu* '08, with risk to deteriorate, while Sool Plateau (Bari region) remains in the ***Alert*** Phase. Of great concern are the Bossaso protracted IDPs currently classified in a ***Very Critical*** phase with no change from post *Gu* '08. This alarming situation is due to a combination of factors, including diarrhoeal outbreaks, reduced access to food due to the increasing food prices, and poor child care practices. The results are consistent with historical data on nutrition surveys conducted among IDPs in the northeast regions, which highlight chronic nutritional vulnerabilities. The lack of an established livelihood system in the IDP population, and the general limited access to basic services, exacerbate the compromised nutritional status of the population.

Northwest

The food security situation has improved for the three main pastoral livelihoods and the agro-pastoral areas of Gabiley district, which were identified in **Acute Food and Livelihood Crisis (AFLC)** post *Gu* '08. As a result, they are now identified as **Borderline Food Insecure (BFI).** There is deterioration, however, for the Golis/Guban pastoral and agro-pastoral areas of Awdal and W. Galbeed (with the exception of Gabiley district) and they are now identified in **AFLC**. Despite deterioration in these areas, the overall rural population in crisis has significantly reduced, as the number experiencing improvements exceeds the number that has deteriorated. The estimated rural population in **AFLC** is now 45,000, which is down from 125,000 in *Gu* '08. The urban poor continue to struggle with hyperinflation, and the number remains at the same level as in *Gu* '08, with 30,000 in **Humanitarian Emergency (HE)** and 110,000 in **AFLC**.

Deyr '08/09 rainfall was normal in most parts of the northwest; however, the pastoral areas of Golis/Guban and the agro-pastoral areas of Galbeed, Awdal and Togdheer regions received below normal rains. Water availability is generally good to average in most parts of the regions; however, localized areas of Hawd of Hargeisa, Lasanod and the upper Nugal valley of Aynabo and Elafweyn districts, and west of Sool plateau, which all received below normal rains, are expected to face water shortages during the upcoming *Jilaal* season. Livestock body conditions are good to average, but poor in Golis-Guban due to poor pasture conditions. Camel calving is low to none due to low conception rates during *Deyr* '07/08, which resulted in below average milk production. During *Deyr '08/*09, camel conception rates were medium to high. Sheep/goat kidding rates were medium, which is due to medium conception rates during *Gu* '08. A slight decline in small ruminant herd sizes was noted during the assessment; the decline was the result of a disease outbreak and increased off-take for sales. However, herd sizes are still above baseline levels, with the exception of Golis Guban, where sheep/goat herd sizes were 68% below baseline levels. Income from livestock sales increased due to high demand of mainly export quality sheep/goat during the Ramadan and Hajj periods. In the northwest, *Gu/Karan* '08 crop harvest is estimated at 17,552 Mt, which is 70% of *Gu/Karan* '07, 94% of PWA and 72% of the five-year average. Local cereal supply in the main markets is below average due to poor crop production and limited to no carry-over stock from the *Gu/Karan* '07 production.

The integrated nutrition analysis from the *Deyr* '08/09 season, for the northwest region, indicates that the Golis/Guban livelihood zone is the only zone with a marked deterioration in the nutrition situation from ***Critical*** in the Post *Gu* '08 to ***Very Critical*** in the Post *Deyr* '08/09. A nutrition survey conducted in October 2008, reported a global acute malnutrition rate of **20.7**% (and severe acute malnutrition (WHZ<-3 or oedema) rate of **2.4%** (1.4-3.5). The alarming nutrition situation is mainly attributed to high morbidity rates from disease outbreaks, reduced access to milk due to out-migration of livestock, loss of livestock from earlier freezing rains and hyperinflation. The nutrition situation has however improved in the remaining rural areas. The mitigating factors in these areas include increased access to milk and livestock products and an overall improved food security situation.

Recent and forthcoming publications and releases

FSAU Press Release, February 5, 2009
FSAU/FEWSNET Market Data Update, January 2009
FSAU/FEWSNET Climate Data Update, january 2009
FSAU Nutrition Update, Noember - December, 2008
FSAU Technical Series Report, Post Deyr '08/09 Analysis, September 2008 (Forthcoming)

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