SOMALIA Food Security Outlook Update — May 2012

Gu season crop performance in Southern, Central, and Northern Somalia near average

Key messages

- Food security is expected to deteriorate during the April-June period, the peak lean season for households which rely on crop production (Figure 1). However, food insecurity is not expected to reach 2011 levels and improvements are expected following the July/August *Gu* harvest.

- Moderate rainfall in Lower and Middle Shabelle, Bay, and Bakool regions has supported crop germination and establishment. Near average *Gu*-season production is expected if rains continue over the coming months, though cricket outbreaks, flooding, and reduced area planted in Lower Shabelle could reduce the overall, national harvests.

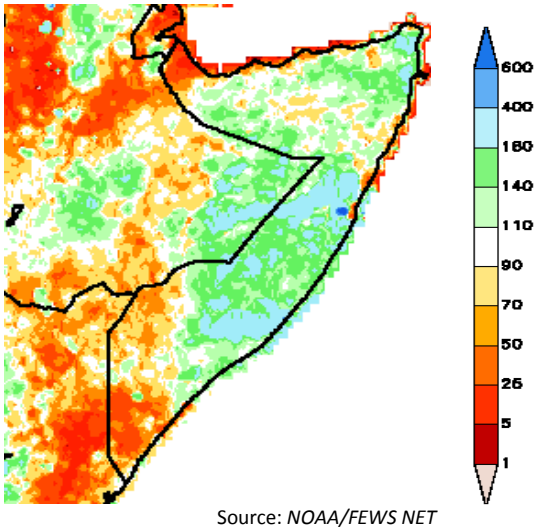
- Despite the overall nutrition situation improvement since July/August 2011, levels of acute malnutrition and mortality remain above emergency thresholds in southern Somalia. The prevalence of global acute malnutrition (GAM) in rural areas of the south ranges between 20 and 30 percent with the exceptions of Bay region and the Juba Riverine livelihood zone, where the GAM prevalence likely remains above 30 percent. Levels of acute malnutrition have improved more significantly in Mogadishu.

- Late May and June rain performances will still determine the overall size of *Gu* crop production in southern Somalia.

Seasonal performance

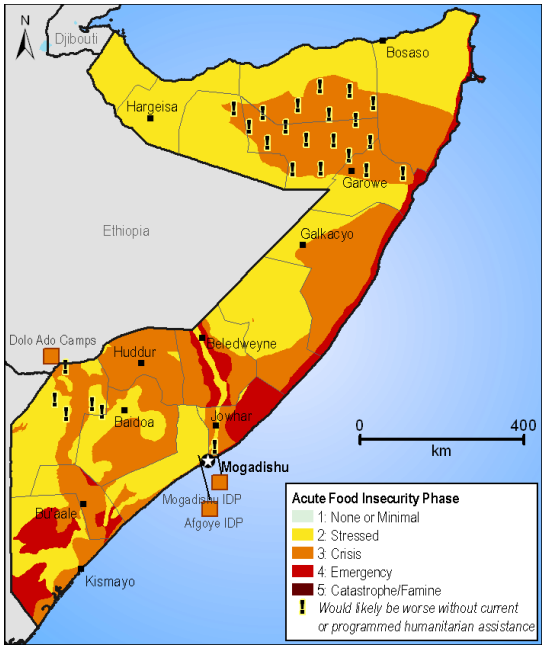
The *Gu 2012* rains started one to two weeks late with varied amounts, intensity, and coverage. Light to moderate rains were received in most parts of the country, but there were exceptions including most of the coastal *Deeh* of southern, central, and northeastern Somalia, parts of Gedo region, and Lower and Middle Juba regions where a substantial rainfall deficit persists (Figure 1). Rains helped replenishing water catchments in the key pastoral areas improving browse and grazing conditions and enhancing crop condition in the agropastoral areas. In the sorghum-growing region, reports also indicate farmers have replanted after crickets destroyed seedlings early in the season. Vegetation conditions in many parts of the country are regenerating though they are still below average. Vegetation conditions across Somalia though are substantially better than in 2011. Improvements in water availability pasture and browse conditions, and livestock body conditions are expected in the pastoral areas that received rains. In the

Figure 1. March 1 – May 15, 2012 rainfall estimate (RFE2) as a percent of normal



Source: *NOAA/FEWS NET*

Figure 2. Projected acute food insecurity, April-June 2012



Source: *FEWS NET/FSNAU*

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

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main cropping areas of the South, moderate rainfall in Lower and Middle Shabelle, Bay, and Bakool regions has supported crop germination and establishment. Near average *Gu* season production is expected if the rains continue over the coming months. However, this scenario could change as cricket outbreaks, flooding, and reduced area planted in Lower Shabelle could reduce the overall, national *Gu* harvest.

Gu season production typically accounts for 60 to 70 percent of total annual cereal production in Somalia. Overall, harvest prospects in southern and central Somalia point towards a harvest that is expected to be near average. In a typical year, Lower Shabelle region accounts for 44 percent of *Gu* production in southern Somalia (Figure 3).

Figure 3. Average contribution to overall *Gu* production, by region in southern Somalia

Region	Average Percent Share
Bay	27
L. Shabelle	44
M. Shabelle	11
Hiran	2
Gedo	4
M. Juba	7
Bakool	1
L. Juba	4
TOTAL	100

Source: *Food Security and Nutrition Analysis Unit-Somalia (FSNAU)*

Staple food prices: Local staple cereal prices have continued to decline since October 2011 in all cereal-producing and deficit markets. Cereal price declines had been influenced by the combination of the above average *Deyr* 2011/12 harvest, the substantial cereal imports for humanitarian assistance, the monetization program in Banadir region, the off-season *Deyr* harvest in riverine areas of Juba, and commercial imports. However, the prices are showing upward trend in May and will continue increasing until the arrival of the next harvest in July as is typical for the season.

In this year, in the Northwest, both maize and long-cycle sorghum which has a six-month cycle is performing well in agropastoral livelihood zones of Togdheer, Woqooyi Galbeed, and Awdal regions. The production in these areas is expected to be average to above average, but it depends on the performance of the *Karan* rains from June to August which some forecasts indicate may be above average. In Central Somalia in the cowpea belt, light to moderate rains in April supported seed germination. However, there was a long dry spell from the last ten days of April to the first ten days of May. The dry spell affected the crop growth and has resulted in the cowpea and sorghum crops wilting. If rains did not resume during late May and June, crop failure is expected in the cowpea belt. Unlike last year, national supplies of cowpea have improved since the *Deyr* harvest, but crop failure would have an impact on agropastoral households within the cowpea belt.

In Hiran, the crop conditions are mixed In agropastoral areas of Beletweyn and Jalalqsi districts, crop establishment is poor due to below average and poorly spatially distributed rains along with dry intervals. This has resulted in a reduced area planted. In Bulaburte district, there is significant crop establishment due to the nearly timely and adequate start of season and continued rains. In the riverine livelihood zone of Beletweyn and Jalalaqsi districts, crop conditions are reported to be good. However, irrigation is being used during April and May, which is abnormal at this time of the season. Irrigation water usage in this zone does not typically begin until the rains end in June. Increased use of irrigation increases the costs of the agricultural inputs such as diesel for pumping water. However, the river level on the Wabi Shebelle has been recorded between 3.95 meters (m) and 5.12 m, which can provide further irrigation water to meet all crop water requirements.

In Middle Shabelle, the crop conditions are average due to the average to good rains received during April. Slight moisture stress is observable, but if average rains resume during late May and June, an above average harvest is still possible. Most households in the riverine livelihood zone are accessing gravity-powered irrigation, but those using pumps are also able to get water to their farms. The southern agropastoral livelihood zone in Middle Shabelle region is at risk of a very poor crop if the rains were to stop completely stop after May 2012 as the crops are in the very early stages of development.

In Lower Shabelle, between 700 and 800 hectare (ha) of cropping land in Kurtunwarey district was inundated by river flooding. Also, planting was delayed until around May 10 due to a variety of factors. There are still many displaced people from the region who are residing in and around Mogadishu at camps for internally displaced persons (IDPs). Some may have been reluctant to return for on-time planting or for this season as they are awaiting a returnee package widely believed to include two goats, one donkey cart, one donkey, and around USD 40 per month for three months as a resettlement fund. Also, the incentives to plant may be less than usual as the available stocks from the 2011/12 *Deyr* remain in sufficient quantities. Also, the reduced cereal prices are encouraging many farmers, especially the better-off, to plant cash crops such as sesame and vegetables rather than cereals. However, growing conditions remain good, so only a slighly below average cereal production is expected. Labor demand per hectare is unlikely to be affected by the switch to cash crops, as Lower

Shabelle's cash crosp will still require weeding, insect control, harvesting, and other labor-intensive activities. However, overall, labor demand will be reduced since planted area is expected to be significantly less than average. Despite these factors, the sorghum crop establishment in the sorghum-growing area of Wanlaweyn is good, and an average harvest is expected if average rains received during late May and early June. In pockets of Afgoye district, crickets attacked the sorghum crop, but the reported damage was minimal. In agropastoral areas of Marka, Barava, and the south of Afgoye districts in Lower Shabelle region, planting has not yet started. Farmers in these districts have just started land preparation. High fuel prices have pushed the tractor hourly rental costs higher than expected throughout Lower Shabelle, which means many poor households who usually use some mechanized plowing have not been able to afford it this year.

In Bay and Bakol, despite the cereal stock available at household level, area planted and overall crop conditions are average. However, poor rains with dry intervals affected the crop establishment and signs of moisture stress are observable. In 20 to 25 percent of the planted area in the high potential agropastoral livelihood zone in Bay region, the Qansaxdhere, Diinsoor, and Baidoa districts, households practiced ratoon (*Boqondhaw*) planting. This means that households left the roots of last season's sorghum crop in the ground to save on labor effort and costs for seed and land preparation. Currently, the standing crop including the rationed crop is at the vegetative stage. The harvests will heavily depend on continued, regular rainfall until the middle of June. If average rains are received until the middle of June, a near average *Gu* will be harvested in this livelihood zone. However, if the current, poorly spatially distributed and erratic rains persist throughout May, below average *Gu* production would be expected.

In Gedo, despite the start of near normal rains during late April which prompted average planting in agropastoral livelihood zones of Gedo, poor rains with long dry intervals during May affected the crop establishment. Much of the crop has wilted. The sorghum crop conditions are average in the high potential agropastoral areas of Bardhere, but signs of moisture stress have been reported. Farmers in the Southern Agropastoral livelihood zone will restart planting should average rains resume around the end of May. Expecting high cereal prices in July due to relatively poor conditions in agropastoral areas in the Juba Valley trade basin, riverine households have increased the area planted for maize. In Dolow riverine livelihood zone, much of the land is still in land preparation. Many households planted late to take advantage of relief agencies offering tractor rentals and water pumping services, and these households are likely to place more land under cultivation than average. The already planted crops are in the vegetative stage. Average to above average maize production is expected, but late planting may delay much of the harvest by one or more months than the typical *Gu* season harvesting period.

In Middle and Lower Juba regions, riverine areas of Jilib, Jamame, and Kismayo districts have not received substantial amounts of rain. However, gradual, flood-recession cultivation is ongoing along the *Dhasheks* (swamps). In Jamame, 40 percent of the cropped land was planted, but the rest is still inundated by water from the 2011/12 *Deyr* flooding that occurred in November and December. In Jilib and Sakow district's agropastoral areas, planting is done, but a long dry spell during late April until the middle of May resulted in low soil moisture. This has reduced the growth of the standing crop. Afmadow, Kismayo, and Badade districts have had poor crop production in the past two successive seasons. Agropastoralists in these districts started replanting after heavy rains resumed in mid-May. If average *Hagaa* rains fall during June and July, an average harvest could come in late August. However, the need to replant following the dry spell has extended the lean season to be between May and July. Cropped land in Sakow and Buale riverine areas has increased. Crop conditions are good as farmers increased their use of tractors for tillage and of pumps for irrigation. Pump irrigation has been a very insignificant part of production in these areas in the past, but this year, households are investing in the season using resources from humanitarian agencies. Maize production in Middle Juba is expected to be above the post-war *Gu* average.

Expected off-season cropping

Floods during the 2011/12 *Deyr* in Lower and Middle Juba and this year in Kurtunwarey district in Lower Shabelle have left much arable land still under water. An estimated of 15,000 ha in Lower and Middle Juba and 700 to 800 ha of arable land in Kurtunwarey remain flooded. Gradual recession cultivation is in progress currently, and since the amount of land is large enough, a significant off-season crop harvest in late August and early September will be possible in these areas. FEWS NET and FSNAU will closely monitor the progress of the off-season harvest.

Areas of concern in pastoral livelihood zones: Coastal *Deeh*

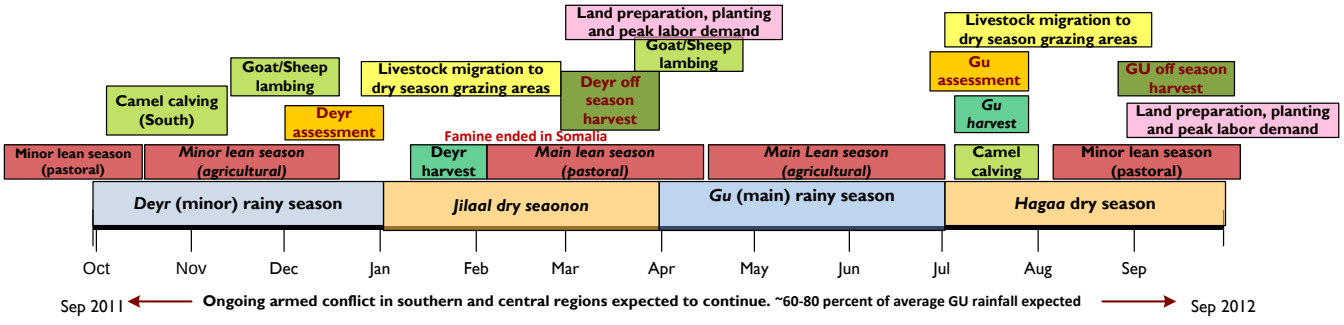
Coastal *Deeh* in the central and northeastern regions experienced another poor and erratic distribution of rainfall so far this season. This has resulted in limited pasture regeneration and water replenishment. As a result, milking animals and their offspring are at risk of dying due to poor nutrients and limited outmigration. Distance has prevented the primarily small ruminant herds from migrating for better pasture and water availability in other livelihood zones. Poor households in this pastoral livelihood zone will remain at Emergency (IPC Phase 4), which is also the current classification.

Exchange rate effects in the North

Since June 2011, the Somali shilling (SOS) continued to appreciate to reach a level it last traded at during late 2007 and early 2008 before the period of high inflation. By end of April 2012, in Banadir and in the northeastern markets, the shilling was traded at regional averages of SOS 22, 275 and SOS 24,250 for USD 1 down from SOS 31,748 and SOS 31,687 during same period last year in Banadir region and the northeastern trade catchment, respectively. This represents approximately 30 and 23 percent appreciation of the Somali shilling on the dollar in Banadir and the Northeast, respectively, since April 2011. Annual appreciation of the Somali shilling is equivalent to 23 to 30 percent across the other regional averages. Theoretically, an appreciating currency would lead to more imports, and increased import competition and availability would lead to less expensive imported commodity prices. While this trend was common across the majority of Somali shilling markets, the rate appreciation of the Somali shilling against the U.S. dollar has not been commensurate with decreases in essential import commodity prices. Especially for the urban households in the northern regions, key imported commodities have not fallen in price commensurate with the appreciation of the Somali shilling. For example, vegetable oil and imported rice in the northeast trade catchment decreased by only four and 11 percent, respectively, over the past year. Prices of all essential imported commodities in other Somali Shilling areas had declined markedly in recent months on account of better access to supplies of relief food in some regions and the strong Somali shilling valuation among others.

In contrast, the Somaliland Shilling (SLSH) has been depreciating since November 2011 with the loss of value compared to the U.S. dollar equivalent to eight percent since last year. This has also contributed to an increase in the prices of some essential, imported commodity prices during same period. This include the monitored commodities like tea leaves, salt, sugar, vegetable oil, and diesel which have increased between three and 19 percent over the past year. The rate of increases is even more significant for unmonitored items including vegetables, fresh meat, eggs, fruit, and other food products reported by key informants. This is mostly attributable to the increased circulation of SLSH in the economy which is due to the change in government policy of collecting tax in SLSH and of the Somaliland shilling starting to circulate in some parts of Sool, Sanag, and Burao. The printing of new currency notes as well as the recent adoption of the SLSH as a legal tender in Togdheer region may also play a role. These developments have negatively affected urban households who operate primarily in local currency and on those whose wages are denominated in SLSH and thus have reduced purchasing power.

Seasonal calendar and critical events



Source: *FEWS NET Somalia*