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FEWS NET FAMINE EARLY WARNING SYSTEMS NETWORK

SOMALIA Food Security Outlook — January to June 2012

Key Messages

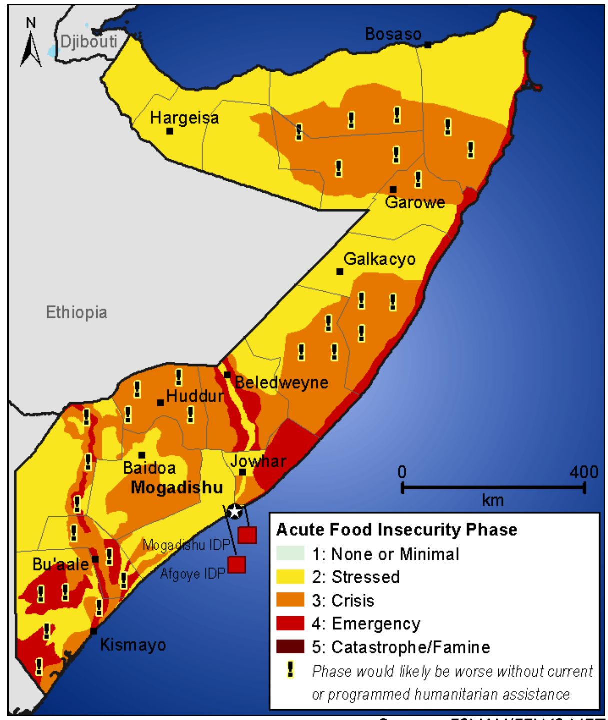
- Famine has ended in southern Somalia. However, nearly a third of the population remain in crisis, unable to fully meet essential food and non-food needs. As of February 3, 2.34 million people remain in crisis, with 73 percent (1.7 million people) living in the southern regions, where humanitarian access remains very limited.

- Improvements in food security outcomes are expected through March, largely due to a significantly above-average *Deyr* harvest, which followed very good rains, and substantial multi-sectoral humanitarian assistance over recent months.

- However, some deterioration is likely between April and June due to typical seasonal factors, insecurity, and an assumption that no major assistance flows will reach populations in Crisis.

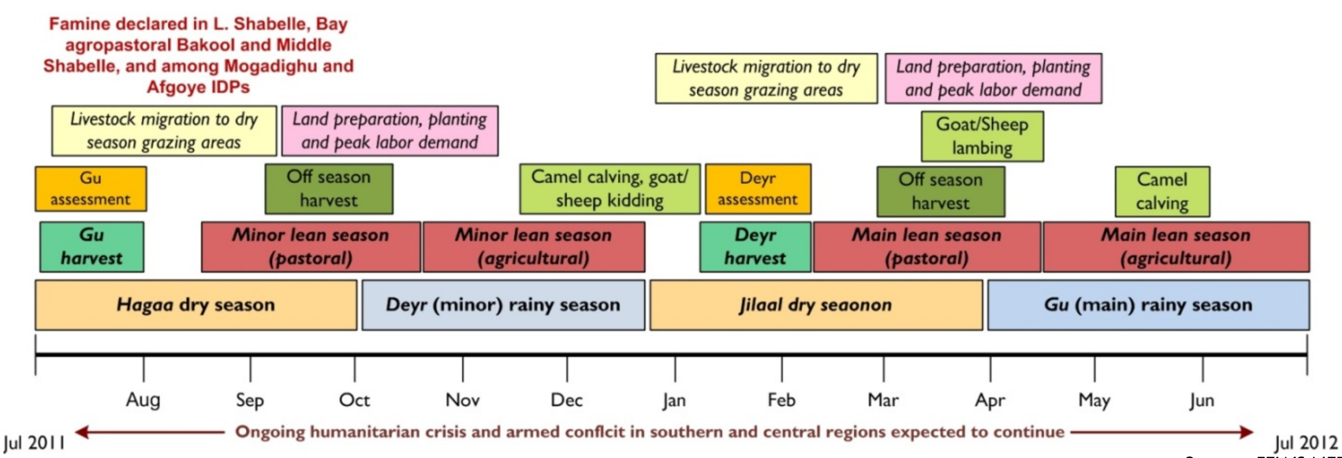
- In the worst-case scenario, late and below average *Gu* rains, a significant escalation of insecurity in most parts of South, Sool/Sanaag and central region, and disease outbreaks will offset recent improvements, though a return to Famine would not be expected during the scenario period.

Figure 1. Current food security outcomes, January 2012



Source: *FSNAU/FEWS NET*

Seasonal calendar and critical events



Source: *FEWS NET*

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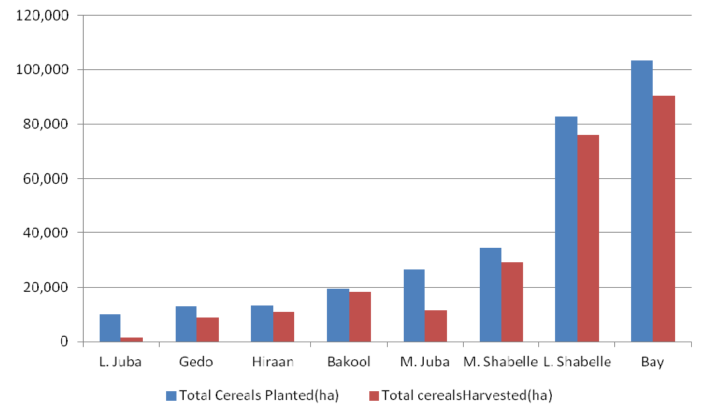
Most-likely food security scenario February – June 2012

National overview

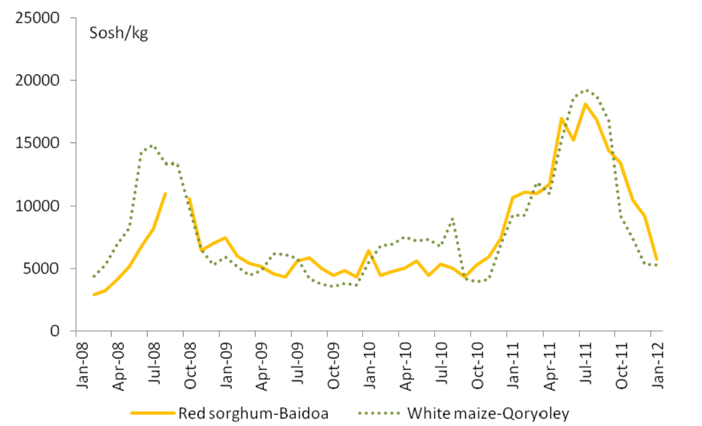
Deyr 2011/12 rains were average to above average in most parts of the country, resulting in average pasture conditions, availability of water resources, and average to above average area planted. As a result, crop production increased substantially this season compared to average, reaching its highest level of the postwar period (1995-present). A harvest of 190,400 MT of staple cereals (maize and sorghum) including 6,400 MT of off-season harvest is expected between now and early March (Figure 2) (*Source: FSNAU*). Staple cereal production in the Gedo and Juba riverine livelihood zones was below average due to floods that damaged planted crops. While the 2012 *Deyr* harvest is expected to be excellent, it is the country's minor harvest, typically accounting for only 10-20 percent of annual consumption needs. Meanwhile, the substantial inflows of humanitarian assistance since September have also contributed to improved access to food and pushed staple food prices down during the lead-up to the *Deyr* harvest.

Figure 2. Deyr 2011 Area planted vs. Area harvested (ha)



Source: *FSNAU*

Figure 3. Local cereal prices in two key reference markets 2008-12



Source: *FSNAU/FEWS NET*

Rangeland conditions throughout the South and Central, and in parts of the Northern regions, have significantly improved. Water and pasture availability are average to good in key pastoral areas, including the previously drought affected regions of **Hiran, Bay, Bakool, Gedo,** and **Juba.** Exceptions are parts of **Hawd, Nugaal Valley, Sool Plateau, East-Golis/Gebi** and **West Golis livelihood zones** in the **Northern regions** where rains were localized and below normal. Importantly, the abundance of water, pasture, and browse in most areas is expected to ensure a mild *Jilaal* dry season (January to March). As a result there is minimal livestock migration reported in most regions and herds are expected to remain in traditional seasonal grazing areas. However, in rain deficit areas of Sool Plateau of Bari region, herds have migrated to Coastal deeh of Banderbayla district while herds from the Nugal Valley of Sool region have moved towards Hawd of Togdheer region.

Maize and red sorghum prices have continued to decline since June 2011. Prices of these local cereals have declined the most in the typically surplus producing areas of Bay and Lower Shabelle (Figure 3). Markets near borders with Ethiopia and Kenya have also experienced notable reductions in local cereal prices. Humanitarian assistance to surplus-producing areas which experienced production failures in 2011 *Gu,* as well as assistance to Banadir region, has increased the overall cereal supply and is one major driver of lower prices. The ongoing *Deyr* 2011/12 harvest, in combination with the September off-season harvest in Lower Shabelle have also increased supply. Prices of local cereals have fallen less in the Juba Valley due recent floods that damaged crops and limited humanitarian access. Across most markets, prices of most imported foodstuffs declined slightly over the past six months due to a strengthening shilling (which has translated into increased cereal imports) as well as food disribution by many relief actors including Organisation of Islamic Countries such as Turkey and Sudan, NGOs, and UN agencies, contributing to significant declines in the Consumer Price Index (25 percent decline in the Central Region and 28 percent decline in the South since July 2011).

According to FSNAU, the overall nutrition situation in the country shows an improvement from the previous season. However, acute malnutrition and mortality rates in the south of Somalia still remain above emergency thresholds and are classified as likely *Very Critical*. The prevalence of global acute malnutrition (GAM) in the south ranges between 20-30 percent, with the exceptions of Bay region and the Juba Riverine livelihood zone, where the GAM prevalence is likely >30 percent. Severe acute malnutrition rates have also improved from >10 percent in all regions in the south to <10 percent. Crude death rates are <2 deaths/10,000/day across the country, apart from among Mogadishu IDPs with 2.06 with (1.60-2.66) and Kismayo IDPs 2.30 (1.60-3.0), though these rates still indicate an improvement over mid-2011. The improvements in levels of malnutrition and mortality are attributed not only to improvements in household food access, milk availability, and income, but also to humanitarian support, in the form of food and non food assistance, and the control and management of disease outbreaks. Outside of the south, slight deterioration has been noted in the Hawd of Central, where the nutrition situation was moved to *Critical* from *Serious* and the in the Hawd of Northwest which moved from *Serious* from *Alert* phase since August 2011. The deterioration in the Northwest is likely due to localized cholera outbreaks and outmigration of livestock to Ethiopia. The situation is likely to improve, beginning in February, when these animals return. The nutrition situation of IDPs remains of concern across the country, with settlements reporting *Serious* to *Very Critical* levels of acute malnutrition.

Food security in Somalia during January/February reflects significant improvements, attributed primarily to good *Deyr* rains and the subsequent harvest and on-going humanitarian assistance. Household stocks are expected to improve significantly with the harvest, labor opportunities will improve, and the pressure on household purchasing capacities has eased significantly – a kilogram of white maize in Lower Shabelle is retailing at about 5,000 Somalia Shillings as compared to 17,500 in June 2011 at the peak of the crisis. Similarly, improved rangeland conditions have resulted in significant improvements in livestock body conditions and productivity for all species throughout the country. In the drought-affected areas of the south and central regions, small ruminants have recovered fully while large ruminants recovery is ongoing. Most parts of the previously famine-affected regions of **Shabelle** and **Bay** are now classified as in Crisis or Stressed (IPC Phase 2 or 3) (Figure 1). However, serious concerns persist, especially in riverine livelihood zones in **Juba Valley** and **Gedo, Middle Shabelle** and **Hiran** agropastoral, Southeast pastoral of Juba and Shabelle and **Coastal Deeh** of central and north where an Emergency (IPC Phase 4) persists. In total, 2.3 million people in Somalia remain classified as in Crisis, or worse, and require humanitarian assistance to meet essential food and non-food needs.

Looking ahead through June, insecurity is expected to remain a significant driver of food insecurity. In areas controlled by militants, the food security of 1.7 million people in Crisis could decline sharply in the coming months due to the lack of access to humanitarian assistance, in particular the recent expulsion of most implementing agencies which remained in the south. On-going military operations in southern Somalia are also anticipated to interrupt production and market activities, impeding consolidation of the recovery process. More specifically, trade movements, access to markets and availability of labor opportunities during the lean season (April-June) in **Gedo, Juba, Bay/Bakool, Hiran** and **Shabelle** could significantly decline due to the anticipated insecurity. Across the south, the May to June lean season is likely to expose the vulnerability of livelihoods in agropastoral areas that are emerging from Famine and Emergency (IPC Phase 4 and 5) levels of food insecurity, unless humanitarian assistance is continued and livelihood resilience is strengthened. Areas that are still in Emergency (IPC Phase 4) or lack of access to humanitarian assistance are of particular concern.

Over the coming months, the impact of the *Jilaal* dry season and the level of humanitarian access will be crucial. In the most-likely scenario, based on medium-range forecasts from NOAA, IRI, and ECMWF and additional analysis by NOAA and USGS, FEWS NET assumes an average March-May season. However, FEWS NET also estimates that there is a higher than usual likelihood of below-average rainfall in terms of total precipitation (mm).

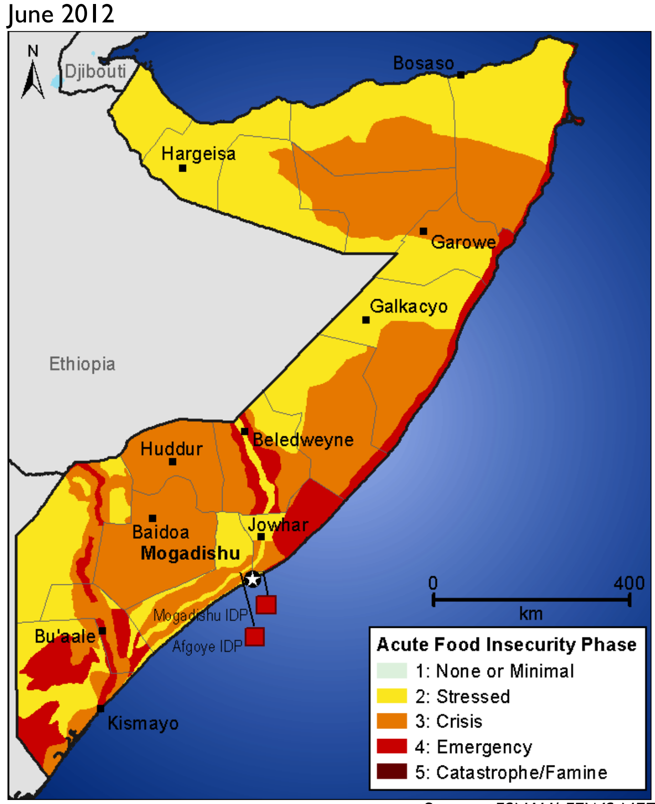
Other important assumptions for the most-likely scenario through June for southern and central Somalia include:

- **Sorghum/Maize:** Availability of locally produced cereals will increase through March/April. Prices will increase seasonably during the April to June period, but they will not reach the peaks of May-July 2011. Prices will decline following the July/August *Gu* harvests, with the size of the decline depending on the performance of the season.
- **Cowpea**: The 2012 *Deyr* season cowpea harvest is ongoing and supplies will increase through at least March 2012. January prices have already declined to pre-crisis levels and further declines are expected as more harvest enters markets. They will rise to a seasonal peak in June, before declining after the Gu 2012 harvest.

- **Rice:** Availability will likely increase with bumper harvests in South and Southeast Asia and a strong Somali Shilling. Humanitarian activities are also likely to reduce pressure on rice prices, hence prices will likely remain relatively stable.
- **Livestock:** livestock prices are currently rising, however they are expected to start declining by February, following the seasonal trend.
- **Conflict:** Insecurity will intensify during this outlook period due to escalating military interventions and clashes between armed groups, the TFG, and the Ethiopian and Kenyan armies, particularly in **Juba, Gedo**, and **Hiran**. Conflict and suicide bombings in **Mogadishu** are expected to persist and will hinder trade and population movement between **Mogadishu, Kismayo, Bay/Bakool**, and **Lower Shabelle**.
- **Assistance:** Due to uncertainty regarding insecurity, humanitarian funding, and implementing partner plans, no major assistance flows were assumed for the projection analysis.
- **Return of Refugees from Kenya and Ethiopia:** According to the Population Movement Tracking (PMT) and UNHCR, "over 6,100 refugees returned from Ethiopia and Kenya to their places of origin in **Bay, Bakool, Gedo**, and **Banadir** regions in January. Lack of livelihood options in the refugee camps, limited services, and reduced food access as well as delays in registration and insecurity are the main reasons for their return. According to UNHCR "Armed bandits roaming the unofficial border crossing routes pose major protection risks to refugees trying to cross the borders". In the most-likely scenario these issues are expected to worsen during the February-March period and are likely to continue through June.

Based on these assumptions, and considering the improved food and income sources of poor households in southern Somalia due to average to above average cereal harvest, and access to humanitarian response over recent months, food security is expected to improve between January and March. During this period, the 4 million people who were in need of emergency food and livelihood support will drop significantly to 2.3 million people, of whom 1.7 million people are from the south. However, despite the anticipated improvements, debt repayment, inadequate emergency response over the coming months, persistent displacement, and the impacts of the 2011 Famine on livelihoods and human health will continue to drive Emergency (IPC Phase 4) food insecurity in riverine areas of **Juba** and **Gedo**, among Cattle pastoralists of Juba and **L. Shabelle**, in **M Shabelle** and **Hiran** agropastoral and in coastal areas of Central (Figure 4). The projected increase in household food access and income is likely to positively impact the nutrition situation. However the positive nutrition situation outlook remains fragile due to continued and anticipated disease outbreaks, high morbidity coupled with the suspension of humanitarian agencies providing nutrition and related services.

Figure 4. Projected food security outcomes, February-June 2012



Source: *FSNAU/ FEWS NET*

During the April-June period, food security is likely to deteriorate in some areas, particulary Bay and Lower Shabelle. While this trend is normal for this period (this is the typical lean season for southern agricultural areas), the severity of outcomes is likely to be worse than usual due to the persistent impact of the 2011 Famine and limits on humanitarian assistance. Nonetheless, a return to Famine is not anticipated.

In the worst-case scenario, a late and below average Gu 2012, escalating insecurity in most parts of South, Sool/Sanaag and central region, and diseases outbreaks, would quickly off-set the improvement made in recent months. A poor season would affect both pasture and water availability in most agropastoral areas of **Juba, Gedo** and **Hiran** and **M. Shabelle** and would substantially reduce crop production, with a subsequent reduction in the size of price reductions expected in the most-likely scenario. Harvests could also be delayed. Income from agricultural labor and poor household cereal stocks would remain average between February and April but would decline from April to June. While some improvement in food security would still be expected during the January-March period, substantial food gaps and an increase in the number of areas classified as Emergency would occur during the second half of the scenario period.

In a best case scenario, humanitarian access and implementation will be substantially better than expected in the most-likely scenario. If this occurs, poor household food access would be substantially better than expected, with less deterioration between current and projected food security outcomes.

Juba and Gedo Riverine LZs

Flash floods, and mistimed, deliberate flooding of fields significantly affected crop production in the **riverine zones** of **Gedo** and **Juba**. Area planted in Gedo totaled 2,710 hectares but only 246 hectares were harvested, yielding 161 MT. However, 680 MT of off-season maize harvest is expected from 910 ha planted. In **Middle** and **Lower Juba**, 12,100 ha were planted but only 200 ha were harvested, yielding 180 MT, though 2,660 MT of offseason maize is expected in March. The flood damage is most prominent in **Lower Juba**, where no Deyr maize harvest is expected and only 150 MT of off-season maize harvest is likely. Current military operations and protracted insecurity in **Juba** and **Gedo** have limited humanitarian access, hindered trade and population movement, and disrupted economic activities and transportation networks, limiting in-flow and out-flow of cereals in some areas.

Maize prices in riverine markets of **Juba** and **Gedo** have decreased significantly since July. Despite some increases in late 2011, these prices are now 13 and 40 percent lower than the last six months and the previous year, respectively, but still 58 percent higher than the five-year average. In **Middle Juba**, maize price remained stable from November to January 2012 but remain 70 percent higher than the 5-year average. In **Gedo** riverine, maize prices dropped significantly from July to January 2012 and prices are 76, 61 and 86 percent of the previous month, the previous year, and the 5-year average.

Though wage to cereal terms of trade have improved in **Gedo**, TOT have actually declined in **Juba**, something that is atypical for this time of year. For instance, In **Middle Juba** the TOT decreased in January 2012 by 20 percent compared to December 2011 and are 20 and 69 percent below the same time last year (Jan'11) and the 5-year average. Households in Lower Juba riverine also face declining purchasing power with TOT declining by 38 and 50 percent compare to same month last year (Jan'11) and the five year average. Labor opportunities in **Juba** are also below-average and no cereal stocks are available, even for middle and better off households who typically depend on own production to meet more than half of annual consumption needs. Meanwhile, debt levels are high in the riverine zones and remittances are not a significant source of income in these areas.

In terms of humanitarian assistance in **Gedo**, ICRC and many non-UN agencies have withdrawn or reduced programming, though food assistance, and cash/voucher support are ongoing. In **Juba,** the level of assistance flows is not clear but it is assumed that only one quarter of people in need received food assistances in January due to restriction imposed on humanitarian agencies.

Using a combination of labor wage income and access to humanitarian assistance, **Gedo poor riverine** households are estimated to be able to meet only 78 percent of the minimum expenditure basket (MEB), indicating Emergency-level food access. Poor households in **Juba riverine** currently face substantial food deficits due to a lack of cereal stocks, reduced wage rates, increasing cereal prices, reduced humanitarian assistance, and increased insecurity. The prevalence of acute malnutrition in **Juba** remains *Very Critical*. Combining these factors the food security situation of the riverine areas of Juba remainsreamins in Emergency and is deteriorating.

Looking ahead through June 2012, the most-likely scenario is based on the following assumptions, in addition to the national and regional assumptions described above:

- Area planted during the Gu season is expected to be average in **Juba's riverine zones** and above-average in **Gedo** due to cash-for work programs and seed distributions.

- Livestock prices will generally follow national trends, decreasing through April and then rising during May/June.
- Local cereal prices are expected to follow the normal seasonal trend, decreasing through March but increasing between April-June in Gedo. In Juba, cereal prices are projected to increase unusually until the next harvest (July/August).
- The **Ethiopian** and **Kenyan** military incursions have cut the supply route for imported commodities from **Kismayo.** As a result prices for imported goods, including sugar, vegetable oil, and wheat flour are likely to increase in all markets bordering with Kenya.
- Labor demand will follow seasonal trends
- Trade restrictions continue to affect in- and outflow of cereals and essential commodities in **L. Juba** and the recent military activity in Juba has reduced trader use of the **Kismayo port**
- Continued presence of IDPs and new displacements, in both Juba and Gedo
- Limited humanitarian access, particularly in Juba, due to violence and control of movement is expected. Some deterioration in access in Gedo, especially during the April-June period, is anticipated due to insecurity and rains.

During the **Feb-March period**, poor households in **riverine areas** of **Gedo** typically meet their food needs through own production, purchases and gifts. However, because poor crop production, very limited livestock holdings (3 goats) and current debt levels of SSh 1,000,000 (USD 40) on average, a significant food gap exists for more than 20 percent of the population in **Gedo** riverine areas. In Middle and Lower Juba households will not be able to meet their basic food needs between Feb/March 2012 due to a lack of household stocks, a decrease in wage rates respectively compared to last year, and a lack of humanitarian assistance outside of **Afmadow** district in Lower Juba. Thus the projected phase during this period remains Emergency (IPC Phase 4).

During the April to June period, household stocks in **Juba's riverine zones** will somewhat improve with the expected harvest of 5,000 MT of off-season cereals and nearly 2,000 MT of cash crops. However, this quantity of food is only equivalent to one month of consumption and will mostly benefit the middle and better-off wealth groups. No humanitarian assistance is assumed in Juba riverine during this period. In Gedo riverine no off-season crop harvest is expected. Military interventions will affect both labor-related population movement and trade in both regions and disease outbreaks are likely during the *Gu* season. Both will exacerbate exisiting food insecurity. Despite some farm labor opportunities during this period, the income from wage labor will not be sufficient to offset the existing food gap. Based on these factors, Juba and Gedo agropastoralagropastola and riverineRiverine households will remain classified as Emergency (IPC Phase 4) through June.

Middle Shabelle and Hiran rainfed Agropastoral

Gu 2011 rains failed in the **agropastoral livelihood zones** of **Middle Shabelle** and **Hiran**, and as a result *Gu* 2011 cereal harvests were extremely poor. The 2011 *Gu* cowpea crop in these areas was affected by both moisture stress and pest infestation, with only 150 MT harvested. These two seasons of poor production resulted in massively inadequate staple food stocks at both the household and market levels, with a Famine declared in **Middle Shabelle** during the last half of 2011. In **Hiran**, repeated drought and a failed 2011 *Gu* season resulted heavy in livestock losses and crop failure resultingwhich has resulted in emergency food insecurity level and increased levels of malnutrion and mortality. Average *Dey*r 2011 rains revived pasture and water in both areas. According to the FSNAU/FEWS NET *Deyr* assessment, a total of 180 MT of cowpea were harvested in **Middle Shabelle** (**Adan Yabal** and **Adale**), while 1,230 MT of sorghum was harvested in agropastoral Hiran. Reported livestock holdings for poor households in **M. Shabelle agropastoral** are 15-20 goats while poor households in **Agropastoral Hiran** currently hold, on average, 10 goats and 2 cattle.

Cowpea prices declined between November and December 2011 but remained stable in Janaury at 43 and 63 percent higher than last year and the five-year average. White sorghum prices in **Hiran agropastoral** declined significantly and are now 58 percent of both last year and the five-year average. These declines in prices have driven increased purchasing power with agriculture labor wage to white sorghum, TOT increasing by 150 percent (4kg → 10kg) compared to January 2011. In **Middle Shabelle agropastoral**, non-agriculture labor wage to white maize TOT decreased by 37 percent in January compared to the same time last year and remains 50 percent lower than the five year average. Debt levels in Hiran agropastoral increased by 100 to 150 USD, with a similar trend in M Shabelle (75 USD → 94 USD).

In a normal year, poor households in these two zones meet their food needs through own production and food purchases funded by wage employment, self employment, and livestock and livestock product sales. However, in 2012, a well below average *Deyr* harvest has compounded extremely poor gu 2011 *Gu* harvests, poor livestock production, high cereal prices, low wages, and a reduction in the value of asset holdings and resulted in significant food deficits at the household level. Assistance to **Hiran** and **Middle Shabelle** regions has declined and major response gaps exist. Intensified conflict in Hiran and **Mogadishu** has further worsened food security by hindering trade and population movement, disrupting economic activities and transportation networks, and displacing large numbers of people. Despite some agricultural production, mainly in Hiran agropastoral, and improved livestock body condition in Middle Shabelle, income and food from agriculture and livestock alone cannot meet the food needs of poor households. In Hiran agropastoral, FSNAU and FEWS NET estimate that only 19 Kg of Sorghum is left for poor HHs from the *Deyr* harvest (Table 1) after crop sales to meet debt repayment obligations. In Middle Shabelle agropastoral, poor households would need to sell twenty four goats to meet the minimum expenditure basket (MEB) during the coming six months (January-June), but average livestock holdings are only 15-20 animals. Based on the limited improvement observed during the *Deyr* season, the current food security classification of Middle Shabelle has improved to Emergency from Famine. Poor agropastoral households of Hiran remain in Emergency.

Table 1: Sorghum production for Poor HHs in Hiran agropastoral and percentage left for consumption

Livelihood	% poor	Estimated poor pop.	HH size	# poor HHs	Total Poor HH Produc. (MT)	% sold	Remaining cereals for consumption (MT)	Remaining cereals for consumption (Avg per HH in kg)
Hiran AgP	**35%**	**47,854**	**6**	**7,976**	**308**	**50%**	**154**	**19**

Source: *FSNAU*

FEWS NET's projected analysis for agropastoral areas of **M Shabelle** and **Hiran** during the **February – June 2012** period is based on the following assumptions, in addition to the national and regional assumptions described above:

- Area planted in rainfed agricultural areas of Hiran and Middle Shabelle is expected to be average, though current levels of insecurity could limit seed availibilty.
- Livestock prices will generally follow national trends and decrease through April but increase between May/June, however, income from livestock sales will remain low due to reduced herd sizes
- Cereal prices are expected to follow seasonal trends, decreasing through March but increasing between April-June
- Ethiopia's military invasion will continue to disrupt trade and population movements from **Mogadishu port** to these regions
- Labor demand will follow seasonal trends
- Limited humanitarian access, particularly in Hiran, due to insecurity

Due to limited household cereal stocks and low milk production, poor and lower middle households in the agropastoral zones of the **Middle Shabelle** and **Hiran** regions are likely to remain heavily purchase dependant and face food deficits until the *Gu* 2012 harvests in August. In February/March, although poor households will be able to access loans after some January debt repayment and some households will have access to limited cereal stocks, most would need to sell some of their livestock to maintain their current level of food access. This asset stripping, in concert with likely levels of acute malnutrition mean that these areas will remain in Phase 4 – Emergency.

In April-June, household food stocks will deteriorate during the typical lean season for agropastoralists who rely heavily on farming. However, due to high levels of expected kidding and calving, milk availability for consumption is expected to improve. Wage rates are also expected to increase during April for land preparation, and social support and access to loans is also expected to rise. Nonetheless, in the absence of assistance, these areas will remain in Phase 4 – Emergency.

Southeast Pastoral and Coastal *deeh* Pastoral Livelihoods

Despite good rains in these areas, pastoral households still face livelihood protection deficits due to successive droughts in recent years which have resulted in high levels of livestock off-take, significantly reducing herd sizes and production and driving a heavy reliance on external support. Cattle herd sizes in the **Southeast Pastoral** and **Coastal *deeh* livelihoods zones** have both declined to ~30 percent of baseline levels. Sheep/goats holdings currently stand, on average, at 59 and 28 percent of baseline in the Southeast Pastoral and Coastal *deeh* livelihoods zones, respectively. Limited milk availability is reported given a combination of these low livestock holdings and below-average livestock conceptions over the last year due to drought. Cattle and sheep/goat conception rates during the 2011 Deyr were medium to high and for those animals which did conceive, kidding and lambing will take place in late March and April, while calving will be in July and August.

Though livestock body conditions have improved, food and income sources are still much lower than any typical year. Sorghum prices in **Central Coastal *deeh*** decreased sharply in January 2012 but remain 41 percent above August 2011 levels. In **Juba,** maize prices decreased by 38, 11 and 44 percent in January 2012 compared to August 2011, same time last year and the 5 year average, respectively. Rice prices in **Southeast pastoral zones** of **Juba** show a downward trend, decreasing by 11 percent in December 2011 compared to the previous year, though they remain 9 percent higher than average (2007-2011). Similarly in **Central,** rice prices have shown a downward trend since September 2011. Livestock prices (goat) in Juba Southeast pastoral increased by 49 and 80 percent in January 2011 compared to August and the same time last year, respectively. In Coastal *deeh* of Central, goat prices remain stable but are higher than last year and the five year average by 68 and 90 percent respectively. In Juba, cattle prices in January 2012 indicate significant increase of 67, 114 and 52 percents compare to August 2011, the same time last year and five-year average respectively. In January 2012, wage rate to Sorghum TOT in Central regions increased by 100 percent compared to August 2011 and 50 percent compared to the same time last year but remain similar to the five year average. In Juba, wage rate to maize TOT have increased by 75 percent over the past six months and 40 percent compared to a year ago, but remain 54 percent below the five year average.

Despite improvements in purchasing power since July 2011 (goat vs local cereal TOT now stand at 60kg maize in Juba and 75kg sorghum in Central), poor households have limited numbers of saleable male animals. As a result, households are either unable to benefit from the imporved TOT or are forced to adopt distress coping strategy of selling productive animals to meet basic food needs. Milk consumption and milk sales income are reduced due to low milk availability.

Insecurity remains significant factor affecting food security in these livelihood zones. The recent Kenyan military invasion into Juba has resulted in high civilian casualties, asset destruction, and population displacement. Insecurity is also hindering trade and population movement, disrupting economic activities and transportation networks, and limiting humanitarian access.

Given improved livestock prices, relief interventions, and a decline in cereal prices, food access has improved and malnutrition and mortality in **Juba Southeast pastoral** have likely improved from levels recorded during mid-2011 (GAM rate of 27 percent and SAM rate of 9.5 percent with CMR and U5MR of 0.93 and 2.76 percent, respectively) though this areas remains *Very Critical*. Malnutrition and mortality in Coastal *deeh* pastoral (December data GAM 12.2 percent and SAM 3.1 percent, CMR and U5MR are 0.19 and 0.77) have declined significantly since *Gu* '11.

Looking ahead, FEWS NET's projected analysis during the February – June 2012 period is based on the following assumptions, in addition to the national and regional assumptions described above:

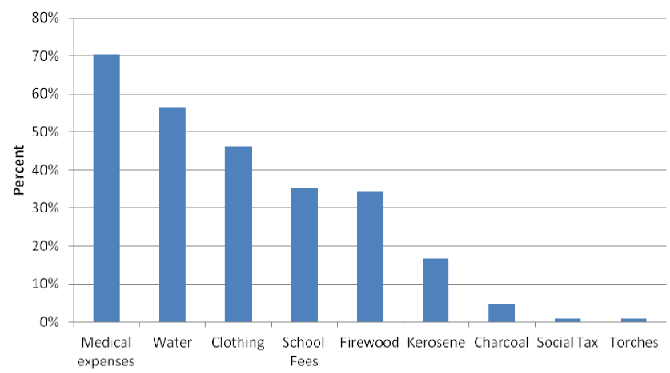
- Cereal prices decrease in January/ February but will increase March-June until the *gu* 2012 harvest enters into the markets
- Rice prices will decline slightly, reflecting good harvests in south and southeast Asia, though inflows of food aid rice are likely to decline.
- Increased local cereal supply in February with seasonal declines between March and June 2012.
- Cattle milk prices will remain higher than average until July 2012 when cattle start calving.
- Limited availability of saleable animals at the household level, hence low livestock sales income.
- Livestock prices likely to decrease until March and gradually increase in April as Ramadan approaches in July.
- Labor (animal watering, water catchment digging and livestock herding) opportunities will improve during Feb-April increasing labor income.
- Intensified fighting will further restrict inflow and outflow of trade and limited traders' movements in Juba pastoral zones. Clan conflicts and insurgent-imposed restrictions on trade, pastoral mobility and humanitarian intervention in Coastal *deeh* of Central .
- As vaccines and health services were reducedwerereduced , and good *deyr* rains received, outbreaks of AWD, malaria, and measles and whooping cough are expected in Juba pastoral during the scenario period

Poor households in pastoral areas depend on food purchase between **January to March** but, income generating potential will be lower than usual because livestock herd sizes have significantly decreased (Southeast pastoral - poor household herd size: sheep/goats – 15 heads; cattle – 10 heads reported; Coastal *deeh* – No cattle at all; Sheep/goats – 28 heads) due to high off-take during past droughts. Despite some income from labor and productive livestock sales, all poor households are expected to rely heavily on food loans and social networks. Between January and March poor households in the Juba pastoral and central/NE Coastal pastoral livelihood zones are only likely to maintain access to the Minimum Expenditure Basket (MEB) through irreversible asset stripping (sale of 8-11 goats). In late March small ruminants (roughly 20-30 percent) kidding is expected and milk availability will slightly increase, but this will not fully offset the existing food gap. These pastoral areas will remain in Emergency during the entire outlook period.

Urban Poor and IDPs in Mogadishu, Kismayo and Buale

During the post *deyr* 2011/12 assessment, the **Mogadishu/Afgoye, Middle Juba** and **Lower Juba IDP population** was estimated to be 651,340 people, of which roughly 91 percent (593,740 people) live in the **Mogadishu/Afgoye corridor**. Due to recent clashes in south Somalia, 54,000 people have been displaced since December 1, 2011. Within Mogadishu, 7,200 people were displaced in January 2012. Though humanitarian intervention in 2011 have alleviated Famine, three-quarters of these IDPs (445,305 people) remain in either Crisis (Phase 3) or Emergency (Phase 4) and malnutrition and mortality levels remain *Very Critical*. Between December 2011 and January 2012, 6,900 people were displaced due to the drought and intensifying insecurity in Juba regions. A total 57,600 IDPs , including both older IDPs and recently arrived IDPs from riverine areas, inhabit **Kismayo** and **Buale**. In addition, food insecurity has reached Emergency levels among local **urban populations in Mogadishu, Buale and Kismayo** and nutrition surveys conducted in October and December indicate *Very Critical* conditions in these areas, with the prevalence of acute malnutrition reaching over 20 percent (*Source: FSNAU*).

Figure 5. % of households purchasing select non-food items



Source: *FSNAU*

Average daily wage rates have increased by 36, 17, and 8 percent in **Kismayo, Buale and Mogadishu** since August 2011. In combination with lower cereal prices, this has driven higher daily wage to cereal Terms of trade (TOT) in Mogadishu, Kismayo and Buale (175, 125 and 100 percent increases since August 2011) though they remain 21, 40 and 73 percent lower than the 5-year average, respectively. In addition, access to labor is low in Kismayo as port activities and trade movement are limited due to insecurity. Assessments in December 2011 indicated that most IDPs, the urban poor, and lower middle households spend 80-88 percent of their income from labor and self-employment on food purchases and are able to access only 75-80 percent of their food needs after employing all safety nets and available coping strategies, Health, water and clothing expenditure consume the remaining income (Figure 5).

The cost of food in Minimum Expenditure Basket (MEB) in January dropped 4-8 percent in Kismayo, Buale and Mogadishu between December 2011 and Janaury 2012 due to reduced local cereal and imported food commodity prices, however, the cost of the overall Cost of Minimum Basket (CMB) increased by 1 and 13 percent in Kismayo and Buale due to reduced Kismayo port activities and trade movement as a result of current clashes, thus pushing non-food commodity pricess slightly higher when compared to Januar 2011. In Mogadishu, the cost of the overall Minimum Basket (CMB) declined by 41 and 7 percent compared to August and January 2011. In order to access the minimum expenditure basket over the coming months, the urban poor and IDP households in Mogadishu and Kismayo will need to access 27 paid labor days per month, while those in Buale will need 54 paid labor days per month. As agricultural labor opportunities will discontinue between February-March, accessing this level of employment is unlikely. Instead, these households are likely to find 15-20 labor days per month, resulting in a 20 percent food access deficit.

In April, agricultural labor opportunities are likely to improve for Kismayo, Buale and Afgoye IDPs able to reach cropping areas of the Juba and Shabelle regions. However, labor opportunities are likely to remain poor for IDPs and urban poor households in Kismayo and Buale towns. Local cereals prices are likely to decline as the off-season harvest from Juba riverine is expected and wage to cereal terms of trade are also likely to increase slightly. Diseases outbreaks are likely since vaccination activities were reduced and medical supplies for health institutions in the region are inadequate. Therefore, between February and June, a Phase 4 - Emergency is likely to persist among **Afgoye/Mogadishu, Kismayo** and **Buale IDPs** and **poor urban** populations.