Overall Food Security Situation

Djibouti is a least developed low-income food deficit country (LIFDC), with an estimated population of 818,000. The economy is largely service-based and agriculture accounts for only three percent of the gross domestic product (GDP). Rainfall in the country is both erratic and low, with yearly rainfall averaging just 200 mm under favorable conditions in all three livelihood zones of Northwest, Southeast and Central.

Food security conditions in the Northwest and Southeast livelihood zones are expected to remain highly food insecure through September as the lean season progresses. However, this is likely to improve in October due to the forecast for good Karan/Karma (July to September) rains and anticipated improvements in animal body conditions. Therefore, food security conditions in these pastoral areas are likely to improve from highly food insecure to moderately food insecure from October to December. The July Emergency Food Security Assessment (EFSA) report indicates that approximately 60,000 sedentary rural populations in all livelihood zones (Northwest, Southeast and Central) will require food assistance, including 33,000 people during the lean season and 27,000 people over the course of the year.

Djibouti has had several consecutive seasons of poor and erratic rainfall that has affected food insecurity. In addition to poor rains, pastoral areas in the Northwest and Southeast have also been affected by above-average cereal prices especially from the urban areas, decreased demand for milk, and reduced remittances. In these areas, limited pasture and browse has also affected animal body conditions and reproduction. Consequently, over the years, income from livestock has reduced.

Compared to 2009, the July 2010 assessment measured a significant reduction in the average household expenditure per capita on food and non-food. The decline in revenue measured through the reduced expenditure, coupled with higher than normal prices; the percentage of household expenditure allocated to food has increased by about 10 percent between 2009 and 2010. The loss of ‘own production’ foods such as milk and butter in the household diet has further increased household’s dependence on the market, family members living in urban areas or ‘community support’. Reduced household income and expenditure and a greater percentage of households expenditure on food has led to measured declines in the household consumption with the percentage of households having a ‘poor’ food consumption doubling, as well as average income and expenditure and a greater percentage of households expenditure on food has led to measured declines in the household consumption with the percentage of households having a ‘poor’ food consumption doubling, as well as average

Household Food Consumption

The Food Consumption Score not only allows comparisons of frequency and diversity among populations but is also used to establish a threshold of dietary quality against which to compare these populations. Weights were based on the nutritional density of the foods. Cut-off points or thresholds were established to enable analysis of trends. Households were then classified as having either ‘poor’, ‘borderline’, ‘acceptable’ or ‘good’ consumption based on the analysis of the data. The graph to the right is the percentage of households with poor, borderline and acceptable consumption between the 4 assessments in 2006, 2008, 2009 and 2010. As the graphs highlights, between 2006 and 2010, the percentage of households with poor and borderline consumption has varied dramatically. However, it is important to note that although the percentage of households with poor and borderline consumption has increased since 2009, and the 2010 prevalence is still below the peak of 2008.

Sources of Food

The July EFSA analysis of food sources indicated that around three quarters of the food consumed by the households is from the market, 13% from food aid and the rest either from own production seen in the consumption of milk (4%) or from community gifts (4%) and transfers from family members in urban areas (4%). Comparing the food consumption groups with the main household food sources, there was no significant difference on the reliance on the market. Between the different livelihoods zones and districts, transfers from family members in urban areas contributed between four and eight percent of the household’s total food basket. Yet, this percentage masks the value of these transfers. Estimating the value of transfers from other family members and community support by the current market prices suggests that of the households that receive transfers, on average, the value is slightly above 11,000 Francs (~60 USD). However, for these households, the value of the transfers equates to approximately seven times the households total expenditure.
**Household Food Expenditure**

Based on results of the July EFSA, average total monthly expenditure per household amounted to just over 12,400 DJF ($70) and average per-capita expenditure of 2,400 DJF (USD13.5) per month. Of this, 69% was used to purchase food items. As the graph highlights, between 2009 and 2010, the percentage of household expenditure on food increased to 69 percent. However, this national average masks differences between the districts which varied between 57 and 81 percent. On average, most households focus their expenditure on cereals, sugar and oil. These three items constituted over 60 percent of the total per capita expenditure nationally and ranges from 55 percent in Arta to 70 percent in Ali Sabieh.

As the graph highlights the percentage household expenditure on food increased compared to 2009; while the total average expenditure per household on food and non-food and average per capita expenditure are higher in 2010.

**Coping and Shocks**

The Coping Strategies Index (CSI) measures the frequency and severity of actions taken by households in response to perceived food shortage. A lower CSI score means less stress and potentially better food security. At the same time, the number of different strategies employed by households is another measure of the degree of coping households are implementing to adjust to the effects of food insecurity. The graph shows the averageCSI score for households in the five districts for 2009 and 2010 and the number of coping strategies implemented by the households in 2010.

As the chart shows, the overall CSI score has increased since 2009 with households implementing between 2 and 3 coping strategies over the previous 7 days. Comparing the average household CSI by the different types of shocks, households that reported the shocks of Diminution du revenu, Faible reproduction du bétail, Mort du bétail, Flambée des prix, and Sécheresse/pluies irrégulières all had statistically significant higher CSI scores than the household that did not report these shocks.

**Markets and Prices**

Sorghum and wheat flour are some of the most important food commodities. Over 65 percent of the total population for Djibouti lives in and around Djibouti City, the capital, making this market the most important for understanding food security conditions. The charts below show retail price trends for two key staples consumed by households in Djibouti. The graphs (from FEWSNET) illustrate the change in monthly prices changes between 2008 and 2010 and how this has varied from the five year monthly average price produced by FEWSNET. As the graphs suggest, the market prices for key staples in 2010 are lower than the peaks of 2008 but still remain above the 5 year long term average.