

Food Security & Nutrition

Issued April 20 , 2010

Quarterly Brief - Outcome of *Jilaal* Dry Season (Jan - Mar)

KEY ISSUES

The food security situation in all livelihoods of Somalia remains as classified during the post *Deyr* 2009/10 assessment (Jan – Jun). The *Jilaal* dry season has been mild, characterized by unseasonal rainfall in most livelihoods of Somalia in February - March period. The rains improved rangeland conditions and alleviated severe water shortage in most parts of the country, including the northern drought affected areas of Togdheer Agropastoral and Sool Plateau of Sanaag region. However, scarce rangeland and water resources of drought affected central regions have deteriorated further regardless of localised light to moderate *Jar* rains received during the *Jilaal* season, due to constant grazing pressure. Early *Gu* planting started in most areas of the South due to favourable conditions created by moderate to above normal *Todob* rains experienced during the *Jilaal* season. The agricultural activities including off-season crop harvesting in Juba regions and early *Gu* planting, contributed to increased labour opportunities and wage rates. These positive developments having been somewhat diluted by a moderate price increase in locally produced cereals, which affected purchasing power of the population in most areas of Somalia. The food security situation of the urban poor has further deteriorated in central regions due to an increased Cost of the Minimum Expenditure Basket (CMB), reduced social support and civil insecurity.

Climate: Moderate to above average *Todob* rains fell in most parts of the South during late February and early March. In the same period patchy and intermittent localized rains occurred also in central regions, while good rains in terms of distribution, coverage and intensity precipitated in most parts of the North, with the exception of Hawd pastoral and parts of Sool Plateau and Nugal valley

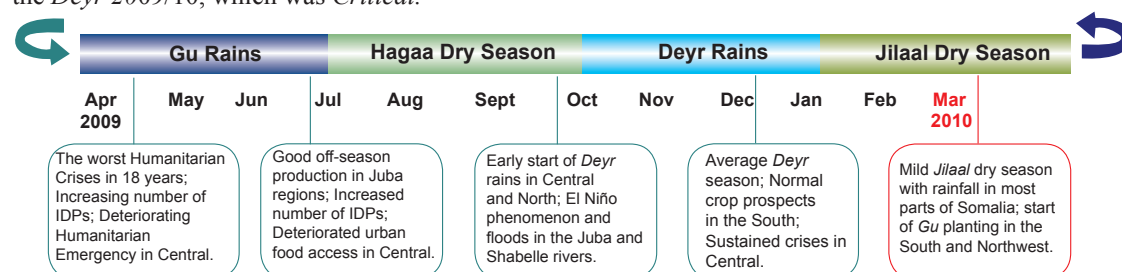
Civil Insecurity: Insecurity is sustained in southern and central Somalia. The violence in the reporting period resulted in an estimated displacement of 173,100 people since January 2010. Sea piracy activities have recently extended to trade vessels carrying goods to Somalia. Humanitarian access remains a severe constraint in the South.

Agriculture: Early *Gu* planting started in most parts of southern Somalia with land preparation and planting being average to above average. In agropastoral areas of the Northwest, land preparation and sowing are also considered to be above average. Prices of locally produced cereals have increased in most markets of southern Somalia, apart from Bay region where they have declined due to bumper *Deyr* harvest. Sorghum prices have also increased in Central and Northeast but reduced significantly in the Northwest.

Livestock: Late *Hays* rains as well as unseasonal rains in the North improved pasture, browse and water conditions in the drought affected areas of Togdheer Agropastoral and Sool Plateau of Sanag regions, as well as other rain deficit areas of northern Somalia. Localised rains in Central and Hiran could not recover the pastures due to overgrazing. Over half a million heads of livestock was exported in the reporting period, indicating a 17% increase compared to the same period last year.

Markets: The Somali Shilling (SoSh) has slightly appreciated since the beginning of the year due to an increased dollar supply from improved livestock trade and piracy activities. The appreciation of Somaliland Shilling (SISh) was marginal in the reporting period. Imported food commodity prices were stable in the South, while sugar and rice prices increased in Central and Northeast but rice price declined marginally in the Northwest. The Consumer Price Index increased in SoSh areas, while it has declined in SISh areas.

Nutrition: Rapid urban nutrition assessments indicated improvements in most urban centres with the exception of Afgoye, Hargeisa, Lasanod, Eldheer, Elberde, Huddur, Belethawa and Harardhere. Preliminary findings from the Togdheer agropastoral nutrition assessment conducted in March, 2010 indicate a **Serious** situation with **GAM** rate of **12.2%** and **SAM** rate of **2.3%**, which is an improvement from the situation in the *Deyr* 2009/10, which was **Critical**.



Somalia Seasonal Timeline & Key Events

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

Integrated
Food Security
Analysis

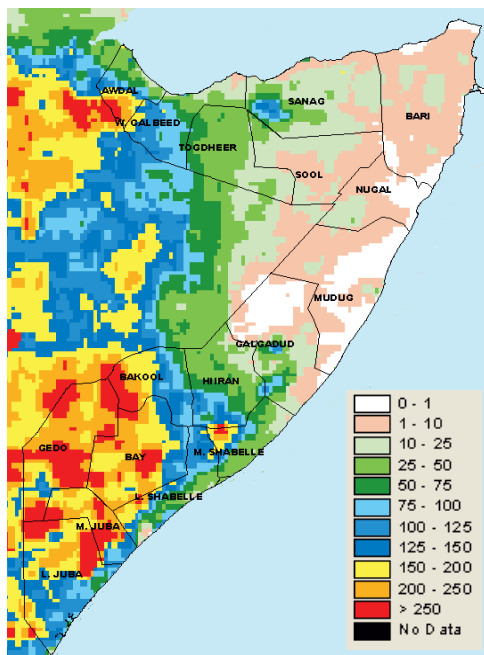
FSNAU - Somalia

United Nations Somalia,
Ngecha Road Campus
Box 1230, Village Market,
Nairobi, Kenya
Tel: +254-20-4000500
Cell: +254-722-202146
/ 733-616881
Fax: +254-20-4000555
Email: info@fsnau.org
Website: www.fsnau.org

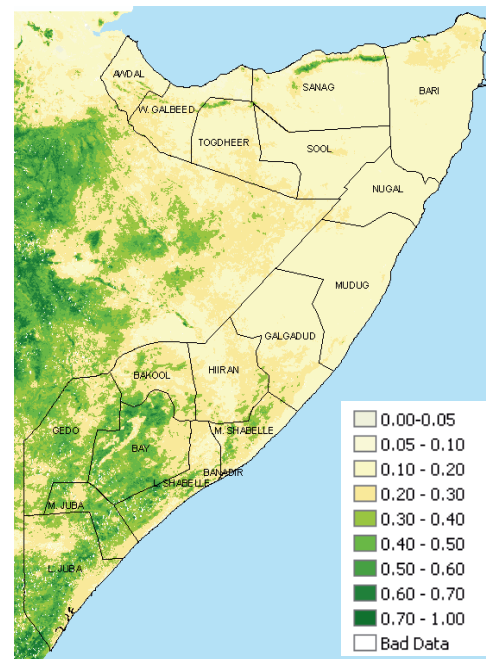
SECTOR HIGHLIGHTS

CLIMATE

Map 1. Cumulative Rainfall Estimates Jan-Mar '10



Map 2. NDVI 3rd Dekad of Mar '10



Unseasonal Rainfall During *Jilaal* Dry Season

The recent *Jilaal* dry season (Jan–Mar) has been relatively mild due to significant precipitation referred to as *Todob* that occurred during late February and early March in most parts of the South, *Jar* rains in Central and late *Hays* and unseasonal rains in northern regions.

In the North, good rains in terms of distribution, coverage and intensity were received in most parts of Golis-Guban, Sool Plateau, and parts of Nugal valley. In addition, significant rains precipitated over Karkaar-Dharoor, East Golis and Gagaab livelihood zones of Bari region. Most of Awdal, W.Galbeed and Togdheer regions have also received remarkably well distributed moderate to heavy rains. However, poor rains are reported in most of Hawd, parts of central Nugal and parts of Sool Plateau. During the first week of March, devastating flash floods hit parts of W.Galbeed and Awdal regions reportedly causing livestock deaths.

In the central regions of Galgadud, Mudug and Hiran, rains were patchy and intermittent in pockets of Elbur, Elder and Hobyo districts of the Cowpea Belt and Addun pastoral. Light showers also fell in remote rural settlements in Galkayo, Galdogob, Dhusamareb, Abudwak and Adado districts. However, rainfall was moderate in pockets of Southern Inland Pastoral of Beletweyne, Bullo-Burti and Jalalaqsi districts.

In the South, unseasonal, well distributed moderate to heavy *Todob* rains began to fall from late February in most of Bay and Bakool, and parts of Gedo, Shabelle and Juba regions. The rainfall exceeded the long term average for these regions by over 300 percent (Map 1).

The exceptions are parts of Adale and Aden Yabal (Middle Shabelle) and Garbaharey (Gedo) districts, as well as coastal parts of Lower Shabelle and Juba regions, which remained dry throughout the *Jilaal* season. However, moderate rains have been reported in these areas during the first week of April. Since early March, Shabelle and Juba river levels began to rise due to moderate rains in the upper catchments of the Juba and Shabelle river valleys but they have started to drop down since late March. However, flooding occurred in parts of Middle Juba (Sakow, Salagle, and Buale) in early March which destroyed parts of the off-season crops.

Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) for the last dekad of March shows extremely poor vegetation in most of the Hawd and Addun pastoral zones of central and northern regions (Map 2), as a result of several consecutive seasons of poor rains and the harsh *Jilaal* dry season. Field reports indicate relatively better pasture conditions in most of the Golis and parts of Kakaar, Sool Plateau, Nugal Valley and the Cowpea Belt. In contrast, vegetation is within a good range in parts of Cowpea Belt (Elbur and Elder districts), and most parts of the South. Exceptions are, however parts of the Southern Inland Pastoral livelihood zone in Hiran, Bakool, Gedo, Lower Shabelle and Lower Juba regions, as well as coastal areas of Shabelle and Juba.

CIVIL INSECURITY

The protracted insecurity in Somalia continues to impact food and livelihood security for both rural and urban Somali populations. Mogadishu and central regions currently remain the key epicentres of the violence, where continued loss of lives, destruction of properties, and disruption in trade and human displacements are regular occurrences.

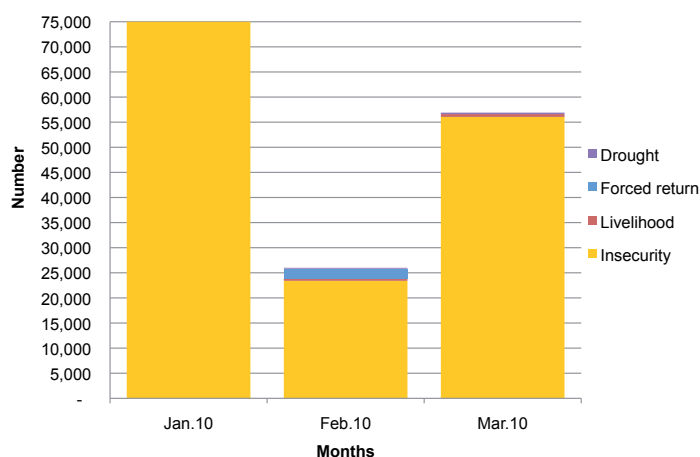
A key outcome of the conflict is a disruption and/or loss of livelihoods for a significant number of the urban population, particularly in Mogadishu and central regions. Most affected are the urban poor households who flee from their homes and who have no livelihood means in the areas to which they are displaced. UNHCR estimates that 173,100 people were displaced since January 2010, primarily due to conflict and civil strife. The largest displacement occurred in January as a result of intensified conflict in Mogadishu and sudden outbreak of clashes in central regions. Mogadishu accounts for the bulk of the population displaced since January (105,000), while the rest come from parts of Hiran and Galgaduud regions. Majority of the displaced have found refuge within Mogadishu, Lower and Middle Shabelle regions, and areas of Mudug and Galgaduud regions (Figure 1).

While conflict is more prevalent in urban areas, particularly in Mogadishu and Central, there are also periodic resource-based conflicts occurring in rural settings. For example, conflicts over water and land resources occurred in the reporting period in Ba'aadweyn and Amara of Harardheere district have resulted in significant loss of lives (over 100 people), restriction of movements among pastoralists for water and pasture, livestock raiding, disrupted trade and constrained market accessibility.

Sea piracy off the Somali coast continues to be a problem for foreign vessels, although incidents of hijacking have reduced in the last three months. However, pirates are now diversifying their strategies by targeting vessels carrying commercial products bound to Somalia. Reportedly, an unprecedented number of pirate attacks in the last month on dhows carrying goods from United Arab Emirates (UAE) to southern Somalia, led to a one-week length trade embargo in Somali waters from the end of March to the beginning of April. (The National, daily newspaper, UAE, 15 Apr '10). Targeting dhows loaded with vitally needed commercial products in the food deficit is likely to have impact on food price increase, which will further undermine the food security situation of the Somalis.

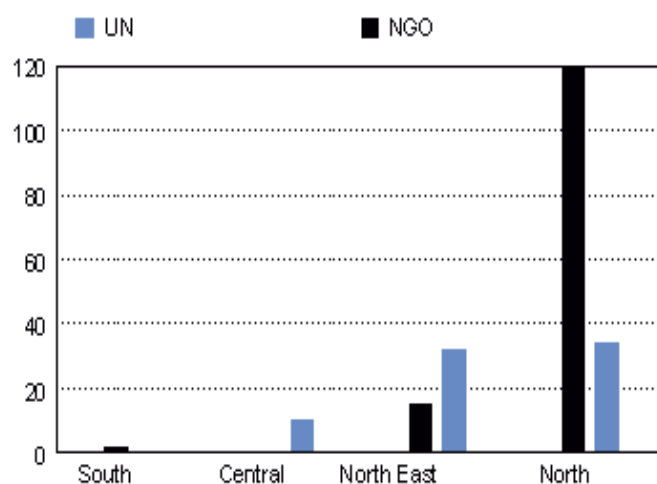
The on-going restrictions of humanitarian operations in the South and parts of the Central, with significant numbers of IDPs as well as rural and urban people in crisis, are also the issues of concern. The IDPs are faced with poor access to food, water and shelter (IASC report, Feb '10) given that humanitarian space has shrunk in much of the South and parts of the Central. In the absence of humanitarian support, large presence of IDPs in those areas may have implications for the host communities in terms of greater competition for employment and social support with the urban poor, commodity price rises, increased environmental problems and hazards, etc. Due to compromised safety of the humanitarian community, the number of operating agencies and staff has reduced in these areas since last year, constraining access to vitally needed humanitarian support (Figure 2). Conversely, the presence of humanitarian agencies has increased in the North, which translates into an overall increase of international aid workers in Somalia from 95 in December 2009 to 196 in February 2010.

Figure 1: IDP Movements in Somalia Jan 1st - Mar 26th '10



Source: Modified from Somalia PMT Monthly Reports, Jan-Mar '10

Figure 2: UN and NGO International Staff Presence, Somalia



Source: UN-OCHA Access Report - Feb '10

AGRICULTURE

Ongoing Agriculture Activities

In the *Deyr* 2009/10 Technical Series Report, the FSNAU projected off-season maize and cash crop (sesame and cowpea) production in Juba regions for March this year. To confirm the projections, FSNAU carried out Off-season Crop Assessment in Juba regions in March 2010, which estimated off-season maize production to be equivalent to 1,600MT. This is slightly lower (6%) than previously projected, attributable mainly to moisture stress from high temperatures in January-February and pest damage, as well as localised floods on 7th March in Middle Juba. Most of the off-season maize harvest, 1,300MT or 81%, was collected in Jamame district (Lower Juba), while the remainder was from Jilib (75MT), Sakow and Buale (132MT) districts of Middle Juba. Sesame was the main off-season crop with an estimated production of 3,200MT, which is close to the projections made during the Post *Deyr* Seasonal Assessment. More than half (57%) of the off-season sesame was produced in Jamame, while the rest was harvested in Jilib (19%), Buale (14%) and Sakow (10%) districts. Jamame also accounted for 80% (480MT) of the off-season cowpea production, estimated at 600MT, with the remainder coming from Jilib, Buale and Sakow districts.

In late February and March 2010, moderate to heavy rains were received in most agricultural areas (both riverine and agropastoral livelihoods) in the South and Northwest (Awdal, Galbeed and Togdheer). Light rains were reported in the coastal areas of Middle Shabelle, Lower Shabelle and Lower Juba as well as the Cowpea Belt livelihood zone of Central. The rains were beneficial for the early *Gu* dry sowing in agropastoral livelihoods, and encouraged farmers in southern Somalia to accelerate land preparation and planting activities. Rains were also favourable for crops established (maize and rice) by early planting in the riverine livelihoods in Shabelle and Juba river basins, with functioning and accessible irrigation systems. Land preparation and planting in crop growing regions are average or above average for this time of the year. Similarly, in the agropastoral areas of the Northwest, land preparation, sowing and first weeding stage (localised settlements) are considered above average.

Cereal Prices and Terms of Trade

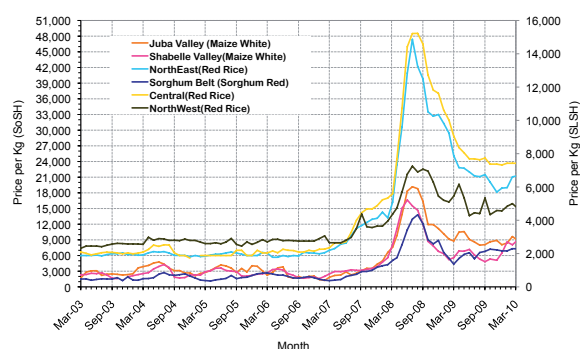
Cereal prices in southern Somalia showed a mixed trend in the January-March period. The prices have increased for locally produced cereals (sorghum, maize) in most southern regions due to low supplies in the areas with below normal cereal production (Gedo, Hiran, Lower Shabelle, Middle Shabelle and parts of Bakool regions) and in Afgoye corridor likely due to suspended food aid distributions to IDPs.

In the Shabelle regions, the aggregated average maize prices for March 2010 are higher (37%) compared to December 2009 levels, due to low maize production in potential riverine areas. Similarly, in spite the bumper *Deyr* harvest in Juba regions, the aggregated maize prices are 11% higher than in December 2009, likely due to worsening security situation resulting in restricted trade movements in the Juba regions. Compared to March 2009, however, the maize prices in the last month were stable in Juba regions. In March 2010, the lowest and highest maize prices recorded are equivalent to 7,000SoSh/kg (Jamame) and 11,500SoSh/kg (Jowhar and Doble), respectively (Figure 3).

Sorghum price trends vary among main reference markets of Sorghum Belt regions. The prices have increased by 6% - 25% in December 2009-March 2010 period in Hiran, Gedo and parts of Bakool regions, with the lowest increase observed in the markets of Hiran and highest in Gedo. On the other hand, sorghum price has declined by 22% in Bay region (Baidoa), due to the bumper *Deyr* 2009/10 crop harvest. There is a considerable difference in March 2010 sorghum prices among the regional markets of the Sorghum Belt, with the highest price of 10,000SoSh/kg noted in Luuq (Gedo) and the lowest (5,000SoSh/kg) recorded in Baidoa (Bay). Compared to March 2009, sorghum prices in the Sorghum Belt markets have increased by 68%, with Hiran showing a particularly high increase (147%). Sorghum prices in Northeast (20,000SoSh/kg) and Central (12,500 SoSh/ kg) have also shown an increase in the last three months (21% and 17%, respectively). Compared to March 2009, the price of sorghum has increased by 23% in Northeast, while it is comparable in Central.

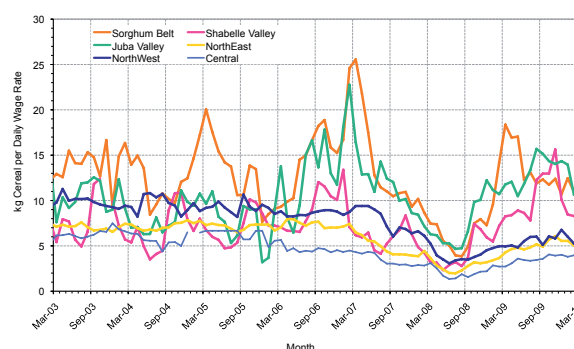
Off-season activities, such as harvesting, transporting and threshing, as well as the on-going *Gu* 2010 planting and weeding have created labour opportunities for poor households since late February. Consequently, the daily labour wage rates have increased in Shabelle (13%), Juba (7%) and Sorghum Belt (8%) regions. However, due to the higher rate increase in local cereal prices versus labour wages, the household purchasing power, as measured by terms of trade (ToT) between cereal and daily labour wage, has declined in many main markets. For instance, due to the increase in

Figure 3: Regional Trends in Cereal Prices (SoSh)



maize prices, the ToT maize/labour wage in the Shabelle and Juba regions have both dropped by 16% in the last three months. In Shabelle markets, the lowest ToT is equivalent to 6-7kg of maize/labour wage (Jowhar and Afgoye), while the highest is 10-11kg of maize (Merka and Qoryole). In Juba regions, the ToT maize/labour wage is higher compared to Shabelle, with the lowest value recorded in March 2010 in Hagar market (7kg/daily wage) and the highest noted in Kismayo (19.2kg). In the Sorghum Belt area, the ToT between sorghum and labour wage increased in Baidoa market by 28%, due to the decrease in sorghum price and maintained labour wage rates (Figure 4). A considerable increase in ToT (30%) since last December was also recorded in Beletweyne (Hiran) (15kg/daily wage) due to increased daily labour wage rates by (38%). However, this increase of ToT in Beletweyne town cannot represent the purchasing power of the rural area, where in March 2010 the daily non-agricultural labour wage rate (SoSh 62,500/day) was 43% lower compared to that in Beletweyne town (SoSh 110,000/day). Conversely, the ToT sorghum/labour wage have declined in the markets of Gedo, namely in Bardera (17%) and Luuq (20%) and are now equivalent to 11kg/labour wage and 10kg/labour wage, respectively.

Figure 4: Regional Trends in Terms of Trade, Cereal to Labour



LIVESTOCK

Pasture, Water and Livestock Migration

As a result of late *Hays* rains in the third dekad of February and average to good unseasonal rains in early March, pasture, browse and water conditions began to improve in drought affected areas of Togdheer Agropastoral and Sool Plateau of Sanaag region, as well as rain deficit pastoral livelihoods of Golis, Dharoor/Kakaar, upper Nugal and localized areas of Hawd in northern Somalia. Consequently, water trucking ceased, as the high amount of rainfall replenished water sources (*berkeds*, communal dams, shallow wells and streams), resulting in dramatic (80-90%) decline in water prices between February and March 2010. These prices are currently closer to normal price levels of *Deyr* 2006/07, equivalent to 2,000-4,000 SoSh/20lt jerry-can. However, most of Hawd, Gabi, Guban and coastal areas of the North remain dry and are exclusively dependent on water trucking.



Poor Cattle Body Condition in Agropastoral - Bullo-Burti, Hiran Region, Mar '10

Localized areas of Addun, Hawd, Cowpea Belt and Coastal *Deeh* livelihoods in central Somalia have received light to moderate unseasonal rains in the third dekad of February and first dekad of March, which have slightly improved pasture and water conditions. However, the rains prompted huge livestock influx to these areas, resulting in overgrazing and early depletion of scarce pasture/water resources. In contrary to northern areas, water prices in Central have increased since December 2009, by 65% in Mudug and 16% in Galgaduud districts. In the last month, the water price at the water sources of pastoral livelihoods of Galgaduud region was ranging between 21,000-32,500 SoSh/drum (200lt), while this was between 40,000 – 41,250 SoSh/drum in pastoral livelihoods of Mudug region. Drought affected areas of Southern Inland Pastoral livelihood zone of Hiran have also received unseasonal light to moderate rains, which partially replenished water catchments and relieved water stress. However, due to constant grazing pressure, the rains were unable to regenerate and improve pasture conditions. Conversely, a significant amount of unseasonal rainfall in late February and early March in drought affected areas of Bakool and Gedo, resulted in replenished water catchments and improved pasture. Pasture and water conditions have further improved in Juba and Shabelle regions, following average to good *Todob* rains received in the same period.

The above-mentioned developments in pasture and water conditions influenced the livestock migration patterns during the past *Jilaal* season. In the North, livestock outmigrated to Nugal Valley and Guban Pastoral of Northwest and Sool Plateau of Bari region have started returning to their settlements. Livestock have also returned to Gedo and Bakool regions after several seasons of abnormal migration to neighboring Bay and Juba regions. However, in Central, significant inter-regional migration is still going on and livestock outmigrated during *Deyr* 2009/10 have not yet returned to their original settlements.

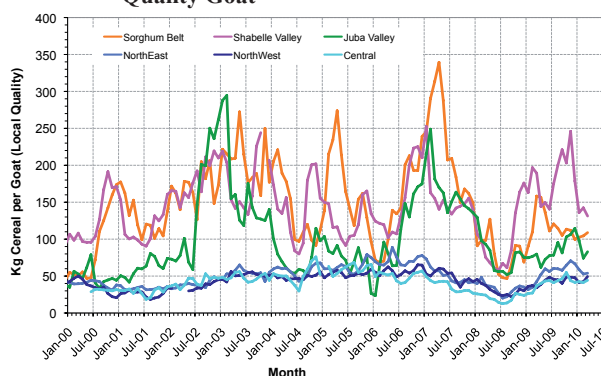
Livestock Body Conditions and Production

The body conditions of livestock started to recover due to average pasture and water conditions in the areas of Bakool, Hiran, Sanaag, Togdheer, Bari, W. Galbeed and Awdal regions, which received unseasonal rains. However, cattle and sheep body conditions are still poor due to their relatively greater susceptibility to drought. Conversely, livestock body conditions have further deteriorated in central regions due to harsh *Jilaal* season, but no animal death has been reported. Milk production has slightly improved in central and northern regions as goats started kidding, although no calving or lambing was observed in the reporting period. In the South, kidding and lambing have started in most livelihoods and camel and cattle calving are expected by July 2010. High goat mortality was reported in Afmadow district of Lower Juba region due to undiagnosed disease affecting respiratory system, as reported by local veterinary personnel and shepherds.

Livestock Trade, Prices and Terms of Trade

Between January and March 2010 about 558,545 heads of livestock was exported from Somalia, of which 51% went through Berbera and 49% through Bosasso ports. These numbers are 17% higher than the same period last year. The lifting of Somali livestock export ban by Saudi Arabia and an increased demand for live animals have ceased demand for all functioning abattoirs in Burao, Beletweyne, Mogadishu and Galkayo. Local quality goat prices have increased by 5-13% in the last three months in most markets of the Sorghum Belt, Shabelle and central regions. Conversely, the prices have declined slightly (7-8%) in Juba and Northeast over the same period. By March 2010, the average ToT of local quality goat/cereal has increased in Sorghum Belt, Northwest and Central, while in Juba, Shabelle and Northeast regions have decreased when compared to December 2009, due to cereal price increases (11%-37%) in these areas. Compared to March 2009 levels, the ToT of local quality goat to cereal is higher in most of the country, with the exception of Sorghum Belt, and Shabelle regions. For example, in March 2010 ToT in Juba, Northwest, Northeast and Central were 4%, 11%, 27% and 20% higher compared to March 2009, respectively, while they were 31% lower in Sorghum Belt and Shabelle regions (Figure 5).

Figure 5: Regional Trends in Terms of Trade, Cereal to Local Quality Goat



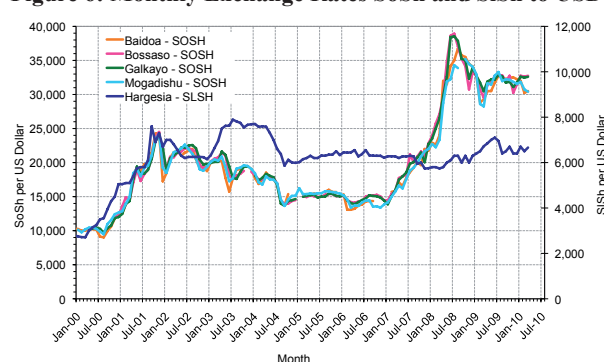
MARKETS

Exchange Rates

The Somali Shilling has slightly appreciated over the last three months in most southern markets. For example, in Mogadishu's main market, Bakaara, the shilling appreciated at about 5% compared to the US dollar (from SoSh 31,850/USD in January to SoSh 30,400/USD in March) and by 4% in Kismayo (from SoSh 31,525/USD in January to SoSh 30,320/USD in March). This appreciation is due to an increase in dollar supply from improved livestock trade and piracy activities. However, when compared to March last year, the shilling has depreciated by about 8% in both markets.

The level of depreciation of SoSh is much higher compared to the pre-inflation period or the base year (March 2007), ranging between 90-100% across most markets of southern Somalia (Figure 6). Other markets showed similar trends or relatively stable shilling, especially during the last four months. Similarly, the Somaliland Shilling has appreciated marginally in Hargeisa market. In the last month, the SISH was traded at an average of 6,663 against the US dollar, indicating an approximate 1% gain in value since January this year (6,700 SISH/USD). However, the SISH has shown a 6% depreciation in the same market compared to the pre-inflation period (March 2007).

Figure 6: Monthly Exchange Rates SoSh and SISH to USD



Imported Commodity Prices

Since January 2010, the price of imported commodities have shown a steady increase in most main markets of Central and Northeast (Figure 7). For instance, prices in Garowe and Bossaso increased for rice (16% and 14% respectively) and sugar (24% and 14% respectively). This is mainly due to a slight decline in supply from markets, especially in Dubai, Pakistan and Thailand, as well as increase in shipping and other import trade related costs, in view of risks associated with continuing piracy activities off the Somali coast. Conversely, import commodity prices in the southern markets remained stable or declined, in line with the exchange rate behaviour. Mogadishu and Qoryoley showed declining

trends while in Baidoa and Galkayo reference markets, the prices of the same commodities remained stable over the last three months. However, average prices of imported commodities in the Northwest showed a mixed trend with rice declining marginally by 2% and sugar, on the other hand, rising by 9%. Increased piracy incidents targeting dhows carrying goods from UAE to southern Somalia may lead to disruptions in food supplies, which could in turn, result in increasing food prices in the coming months (see Civil Insecurity Sector).

Urban Poor Cost of Living

Higher cereal and other commodity prices have led to an increase in the cost of Minimum Expenditure Basket (MEB), especially in the Central, South and Northeast. From December 2009 to March 2010, the average cost of the MEB, or Consumer Price Index (CPI), has increased by 8-27% in the Northeast, Central and South, with Central showing the highest rate of increase (Figure 8). The increase in the CPI in the SoSh areas over the past months is largely attributed to increased prices of sorghum (19%), as well as sugar (8%), milk (11%) and vegetable oil (2%), which together amount to 86% of the urban poor MEB cost. For example, sorghum prices on the main markets have increased by an average of 24% in the South, 18% in Central and 17% in Northeast in the last three months. The average CPI for the SoSh areas are 16% and 127% higher compared to December 2009 and pre-inflation period of March 2007, respectively. Similar price increases in other basic foods in the SoSh area, such as sugar (8%) and milk (11%) also contributed to the overall CPI increase, though to a lesser extent. On the other hand, in the SiSh area, the CPI declined by 2% since December 2009, indicating low inflationary impact of cereal prices (31% and 14% decline for sorghum and wheat flour, respectively). Consequently, the CPI in SiSh areas is 8% above the base year (March 2007).

NUTRITION SITUATION

Togdheer Agropastoral Nutrition Assessment

Preliminary findings from the Togdheer Agropastoral nutrition assessment conducted in March, 2010 indicate a **Serious** situation with **GAM** rate of **12.2%** (9.3-15.8) and **SAM** rate of **2.3%** (1.6-3.5); which is an improvement from the *Critical* situation in the *Deyr* 2009/10. Details will be provided in the upcoming April FSNAU Nutrition Update. Five livelihood based assessments are scheduled to start in May, covering Hawd and Addun pastorals in Central, and Hiran pastoral, riverine and agro-pastoral livelihoods.

Bari Region Nutrition Assessment

In March 2010, FSNAU and partners¹ conducted a rapid nutrition and food security assessment in 15 selected villages in Bari region following concerns of a possible deterioration in the situation. A total of 360 children aged 6-59 months were assessed using weight for health in Z scores and although the survey was not representative, results indicated a similar situation to what was reported in the Post *Deyr* 2009/10. Of all the children assessed, 14% presented with acute malnutrition of which 2.5% presented with severe malnutrition. These results indicate a **Serious** nutrition situation according to the FSNAU Nutrition Situation Framework (see website) Key underlying factors include high morbidity, poor dietary diversity and low milk access.

Acute Watery Diarrhea (AWD)

WHO has reported an increasing trend in the number of AWD cases in Lower Shabelle region reviewed at the Merka Hospital cholera treatment centres (CTC) between March 27th – April 1st, 2010. Reports from Banadir Hospital indicate a steady reduction of cases in week 12 compared to weeks 10 and 11 with one case confirmed for *Vibrio cholera* using the Cholera Smart II® Rapid Diagnostic Test on 16th of March, 2010. Of 19 samples collected from Banadir and Habeeb hospitals CTCs, 8 additional cases have tested positive for *Vibrio cholera* serotype 'Inaba'. In light of the new confirmed cases and heightened displacement from the current conflict in Mogadishu, there is likely to be multiple sporadic outbreaks. WHO has called on health partners to respond to the current situation, of in the past years and heightened displacement from the current conflict in Mogadishu. For latest WHO updates, please visit www.emro.who.int/somalia/CollaborativeProgrammes-eha.htm.

Figure 7: Northeast Trend in Imported Commodity Prices Compared to Exchange Rate

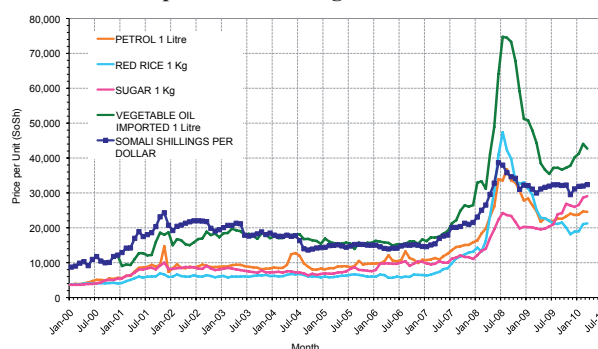
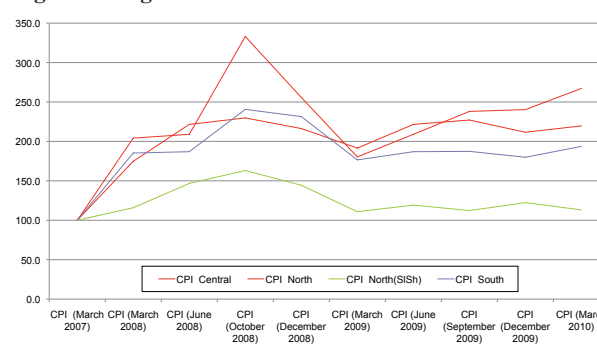


Figure 8: Regional CPI Trends



¹ UNICEF, WFP, UNOCHA, Relief International and Bari administration

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

Overview

FSNAU has conducted its 9th round of the Quarterly Urban Emergency Assessment in the last two weeks of March, covering 22 towns across Somalia. Mogadishu was excluded from the assessment due to insecurity, while all other major towns of all regions have been assessed (Table 1). For the first time FSNAU disaggregated urban food security analysis by categories of urban livelihoods in Somalia to increase accuracy in estimations and ensure greater comparability between different towns. The urban livelihood has been sub-divided into three main categories according to population size and economic activities:

- Main urban towns (big) or cities, which are large and densely populated urban areas;
- Semi-urban (medium) where people derive their income predominantly from agriculture-related activities; and
- Peri-urban (small) areas with small population situated on the periphery or borders of large towns and cities.

The analysis of the assessment data as well as secondary information indicate that persisting inflation in food prices and civil insecurity remain the key factors affecting the food and livelihood security of the urban poor in Somalia.

Increased inflationary impact over the last three months, particularly in locally produced cereals, continued presence of internally displaced people in key urban centres and shrinking humanitarian space, particularly in southern and central regions have been the main constraining factors of food accessibility of urban poor. While 580,000 urban poor are currently in humanitarian crisis, maintained or increased wage rates across the country, average labour availability and food gifts/zakat in agricultural producing areas in the South have been mitigating factors preventing the situation from deterioration. Urban poor of central regions, however, are of more concern due to greater inflation rate, higher food prices, low income and exhausted social support due to several years of sustained crisis.

Hyperinflation, Cost of the Minimum Basket and Purchasing Power

Inflation measured through CPI (change in the cost MEB in relation to base year) continues to be high across the country, showing a further increase since December last year in SoSh areas (Central, South Northeast) and a marginal decline in SiSh areas. The highest rise in inflation levels was observed in Central, from 140% in December 2009 to 167% in March 2010. The CPI increase was in the range of 8-14% in the North SoSh (from 112% to 120%) and the South (from 80% to 94%) over the same period (see Market Sector). Prices of locally produced cereals (sorghum and maize) are significantly higher in relation to their pre-inflation levels throughout the country and increased further in the last three months. The prices of maize, which is commonly consumed in maize producing regions of Shabelle and Juba as well as in Mogadishu, have increased by 37%, 11% and 60%, respectively. This increase is attributable to low *Deyr* 2009/10 maize production in Shabelle regions, increased demand created by suspension of food aid distribution in the South and trade disruptions associated with civil insecurity. In the same period, sorghum prices have increased in the South (24%), Central (18%) and North SoSh areas (17%), showing the highest level in the Northeast (SoSh 20,000/kg) due to high transportation costs of sorghum supplies coming from the South. In the meanwhile, the sorghum price has reduced in North SiSh zone significantly (31%), due to reduced demand as people were able to access more popular and commonly consumed rice, and high supply on the market in view of good cereal crop production prospects in the zone. The price of rice, which is the main staple food in the North as well as northern parts of Central, increased in the North SoSh areas (from SoSh 19,000/ kg to SoSh 21,000/kg) and Central (from SoSh 23,300/kg to SoSh 23,700/ kg). Conversely, the rice price has declined by 4% in the North SiSh zone, as well as the South.

Sorghum is the cheapest and therefore main type of local cereal consumed throughout the country, particularly at times of crisis. Due to this very reason, sorghum accounts for a larger weight in the urban poor MEB, where energy requirement threshold is set at 2100Kcal per person per day for a household of six-seven individuals. Sorghum price dynamics of the last three months, as well as the changes in prices of sugar (see Market Sector) have impacted increase in the CMB of the urban poor across the country, except for North SiSh zone where the CMB reduced marginally due

Table 1: Assessed Urban Areas

#	Zone	Region	Assessed Towns	Town Category
1	North SiSh	W. Galbeed	Hargeisa	urban
2		Awdal	Borama	urban
3	North SoSh	Sanaag	Erigavo	semi-urban
4		Togdheer	Burao	urban
5		Bari	Bossaso	urban
6		Nugaal	Garowe	urban
7	Central	Mudug	Galkayo	urban
8			Elder	peri-urban
9			Haradhere	peri-urban
10		Galgaduud	Dhusamareb	semi-urban
11			Abudwaq	semi-urban
12	South	Hiran	Beletweyne	semi-urban
13		Lower Shabelle	Afgoye	peri-urban
14		Lower Juba	Afmadow	peri-urban
15			Dhobley	semi-urban
16		Middle Juba	Buale	peri-urban
17		Gedo	Bardera	semi-urban
18			Belethawa	semi-urban
19		Bay	Baidoa	urban
20			Dinsor	semi-urban
21		Bakool	Hudur	peri-urban
22			Elbarde	peri-urban

to significant price decline for sorghum (Figure 9). Overall the CMB has increased marginally in the South (14%) and North SoSh zone (8%) and moderately in Central (27%) with the respective average CMB in these zones equivalent to SoSh 1,914,000, SoSh 4,130,000 and SoSh 3,768,000. In the North SiSh zone the CMB has gone down by 2%, from SiSh 823,277 to SiSh 811,081 due to significant decline in sorghum price. By urban categories, the increase in the CMB was observed in semi-urban (6-14%) areas apart from the South where it declined marginally by 2%, as well as in peri-urban areas of the South and Central (10-20%). Conversely, CMB has declined (4-7%) in the main urban towns of Somalia. This is attributable to relatively cheaper food and non-food commodities in big urban centres, supplying these commodities to smaller urban towns at additional costs associated with transportation.

The Terms of Trade (labour to cereals) have generally declined in the last three months in most main urban markets due to increase in sorghum and maize prices. The exceptions are the markets of Sorghum Belt (Baidoa and Beletweyne), where the ToT has increased in the range of 28-30% due to decline in sorghum prices in Baidoa (22%) and significant increase in labour wage rate in Beletweyne (38%) resultant from declining conflict and confrontations in the town. On average, in March 2010 the ToT in the South stood at 11kg/daily labour, indicating 8% decline from three months ago and 15% from the same month last year. In central regions, the ToT sorghum/daily labour has maintained the same level (4 kg/daily labour) since December 2009 but was considerably higher (by 48%) than in March last year (2.7 kg/daily labour). Conversely, the ToT (labour to rice) has declined in both North SoSh (9%) and North SiSh areas (17%) in the last three months, from 5.5 to 5 kg/daily labour and from 6.8 kg to 5.7 kg/daily labour, respectively, although they are higher (by 16% and 14%, respectively) compared to the same period last year (March 2009) (Figure 10). The decline is attributable to increased rice prices in the North SoSh zone and declined labour wage rates in the North SiSh zone. By zones, the highest ToT is found in the South with relatively cheaper, locally produced cereals (sorghum and maize), while the lowest is in Central, with higher imported rice prices and lower labour wage rates.

Income, Labour Availability and Wage Rates

An analysis of the urban poor income (Mar '10) shows varying levels and mixed trends compared to the levels of three months ago (Dec '10). Incomes of the poor in the main urban (big), semi-urban (medium) and most peri-urban (small) centres have increased in correlation with the inflation levels of the same period. The exceptions are small peri-urban centres of the South where incomes have slightly reduced in the last three months, likely due to recent suspension of humanitarian activities, affecting labour opportunities from portage – one of the most common labour activities of urban poor. According to the assessment findings, on average, male members of poor households had access to labour for 20-24 days/month in March 2010, while women and children were more engaged in self-employment activities (petty trade, water sales, etc.). Overall, labour wage rates increased over the last three months in the South and North SoSh areas at a time when inflation and cereal prices were also going up. However, in Central wage rates were comparable or have declined slightly since December 2009, while these have gone down in the North SiSh areas due to low construction activities and labour oversupply.

Generally, incomes of the poor in most urban centres were adequate to meet, or cover beyond, the CMB. However, due to lower income levels in Central, particularly in drought stricken Abudwaq, Dhusamareb and Elder, the expenditure gap persisted and increased further up to 34-46% from three months ago. The increased gap is attributed to reduced social cash support (remittance, gifts, and loans), from an average 24% share in the income in December 2009 to 13% in March 2010, due to overstretching resultant from consecutive years of drought, conflict and large IDP presence. Conversely, the contribution of social support to the incomes of the urban poor has increased in other SoSh areas in the range of 2-8%. By March 2010, the share of social support in the urban poor incomes was equivalent to 17% in the South, 27% in North SoSh areas and 20% in SiSh areas.

Figure 9: CMB Trend Analysis

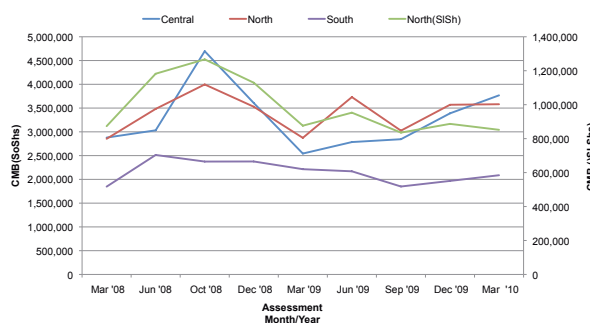
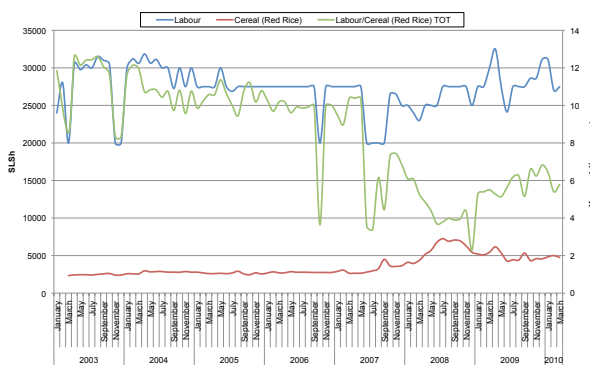


Figure 10: Average Wage Rates, Cereal Prices and Terms of Trade in SiSh areas



Urban Nutrition Analysis

As a component of the urban assessment, rapid nutrition assessments were conducted in 25 Somali urban centers. These assessments assessed Mid Upper Arm Circumference (MUAC) of 4511 children from 780 households aged 6-59 months, household dietary diversity of preceding 24 hrs and proportion of households reportedly employing severe coping strategies considered. Results were compared to the same time period in 2009. As the surveys were not representative they should be interpreted with caution.

Results indicated that the most nutritionally vulnerable urban centres with the highest proportion of acutely malnourished children (MUAC <12.5cm or oedema) were Jowhar, Eldheer, Baidoa, Burao, Elberde (L/Shabelle, Central, Bay, Burao, and Bakool region respectively). The situation in Eldheer and Elberde is mainly attributed to persistent poor household food security. In Bay and Shabelle disease and poor dietary diversity are the major contributing factors. Further concerning proportions of households consuming a poorly diversified diet (<4 food groups) were only reported in Burao and Lasaanod towns. Purchase is the main way to access food, except in Buale/Sakow and Lasaanod towns, where main food sources were own food production and zakat. The urban centers with increased levels of severe coping strategies being employed compared to the same time period in 2009 were Afgoye, Hargeisa, Lasanod, Eldheer, ELberde, Huddur, Belet Hawa and Haradhere.

RURAL

In general, the food security situation has shown a slight improvement in most parts of Somalia, particularly in the drought affected and rain deficit livelihood zones, with the exception of central regions. This is a result of normal to good unseasonal rains received during *Jilaal* 2010, which improved water and rangeland conditions, livestock production and labour opportunities in view of intensified agricultural activities. However, the numbers (3.2 million people) and distribution of population in Humanitarian Emergency (HE) and Acute Food and Livelihood Crisis (AFLC) estimated during Post *Deyr* 2009/10 assessment remains unchanged. Livelihoods of drought stricken central regions (Mudug, Galgaduud and Hiran) have been negatively affected by the long *Jilaal* dry season, which came after six consecutive seasons of rain failure with heavy livestock losses, hyperinflation, civil insecurity and market disruptions.

The nutrition situation is very alarming in these areas and sustained significantly above emergency levels (**Critical to Very Critical**) since *Gu* 2009. Conversely, the food security situation of pastoral and agropastoral areas in Sanaag and Togdheer identified in **HE** during Post *Deyr* 2009/10 has improved, due to improved water and pasture conditions, leading to decreased household expenditures on water and fodder purchases and livestock migration, on one hand, and increased income from livestock sales, on the other. In the South, the impact of moderate to good unseasonal rains on food security was slightly diluted by increased cereal prices in most markets. However, household incomes are positively affected by improved milk production and labour wage rates resultant from abundant agricultural labour opportunities in February-March 2010. In early April, the *Gu* 2010 rains started in some parts of the North, but at this point it is too early to determine the overall seasonal performance and its impact on food security.

Northern Regions

The late *Hays* rains (Golis and Coastal/Guban) and moderate to good unseasonal rains, during late February and early March, positively affected most pastoral and agropastoral livelihoods of the North. The rains have replenished water catchments and shallow wells and accelerated pasture and fodder regeneration. As a result of improved water availability, water prices have drastically reduced and even were available free of charge in localized areas where rains were abundant (Togdheer Agropastoral, Sool Plateau of Sanaag and Bari). However, the rains had an adverse impact in Awdal and W. Galbeed regions, causing flash floods during the first dekad of March, which resulted in some livestock deaths, damaged water infrastructure and houses and disrupted trade activities. In contrast, Hawd of Sool and Eyl district (Nugal region), central Nugaal valley, most of Gebi valley of Sanaag and coastal areas of Bari and Nugal region remain dry or received insignificant localized showers.



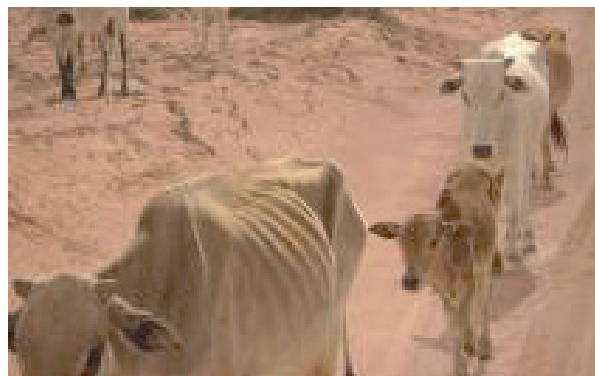
Water Pan at Dharoor Valley - Iskushuban, Bari Region, Mar '10

Water trucking has been continuing in these areas for the last four months, but water prices have reduced due to overall improved water availability in neighbouring livelihood zones and reduced distance to water sources. Water prices have also reduced in Awdal, Togdheer and W. Galbeed (by 20-33%) as well as in the *berkad* dependent livelihoods of Sanaag and Sool regions (by 5%) compared to December 2009. ToT between local goat and cereal (rice) shows an increasing

trend in Northwest (4%), while it has decreased in Northeast (6%) since December 2009, due to the decreased livestock price and increased cereal prices. However, ToTs are still 27% and 45% higher than in March 2009 (see Livestock Sector). In addition, results of the Rapid Food Security and Nutrition Inter-Agency Assessment conducted in northern part of Bari region indicated some alleviation of water crisis following the average to good rains received in these areas. The other main findings of the assessment include, the return of out-migrated livestock into the area, strong social support extended to poor pastoral households during the time of stress, as well as sustained Nutrition phase (*Serious*). Given the assessment outcomes, the phase classification identified during Post *Deyr* 2009/10 for northern Bari (Borderline Food Insecure with Moderate Risk of Deterioration to AFLC) remains unchanged.

Central Regions (*Mudug, Galgadud and Hiran*)

The food security and nutrition situation in central regions has continuously been deteriorating since *Gu* 2007, due to prolonged drought, high presence of IDPs, market disruptions resulting from civil insecurity, sea piracy activities affecting food imports, hyperinflation and high cereal prices. The above factors resulted in extreme depletion of all livelihood assets in the regions, forcing households to adopt severe distress coping strategies to survive. Livestock herd size, the main income source in all rural livelihoods of Central, has further declined in January-March 2010. This is due to limited births resulting from low to no conception in the preceding season as well as high livestock sales by households to meet their minimum food needs. The long *Jilaal* dry season has further deteriorated rangeland and water conditions, resulting in reduced livestock conception rates, emaciated livestock body condition and no milk production. These factors have caused continuous movements of many pastoral households towards main villages and towns in search of assistance.



Weak Cattle - Harardere, Mudug Region, Mar '10

As reported during Post *Deyr* 2009/10 Assessment, improvements in Cowpea Belt agropastoral and Coastal *Deeh* pastoral livelihoods resulted in the overall reduced numbers of people in crisis in Central (from 76% in *Deyr* 2008/09 to 70% in *Deyr* 2009/10). The urban poor comprise 15% of the people currently in crisis. Even if the *Gu* 2010 rain performance is good and inflation continues to decline, the population will still remain in crisis for some time. The recovery of the livelihood assets and strategies will take several consecutive normal seasons, because of the prolonged nature and severity of the crisis.

Southern Regions

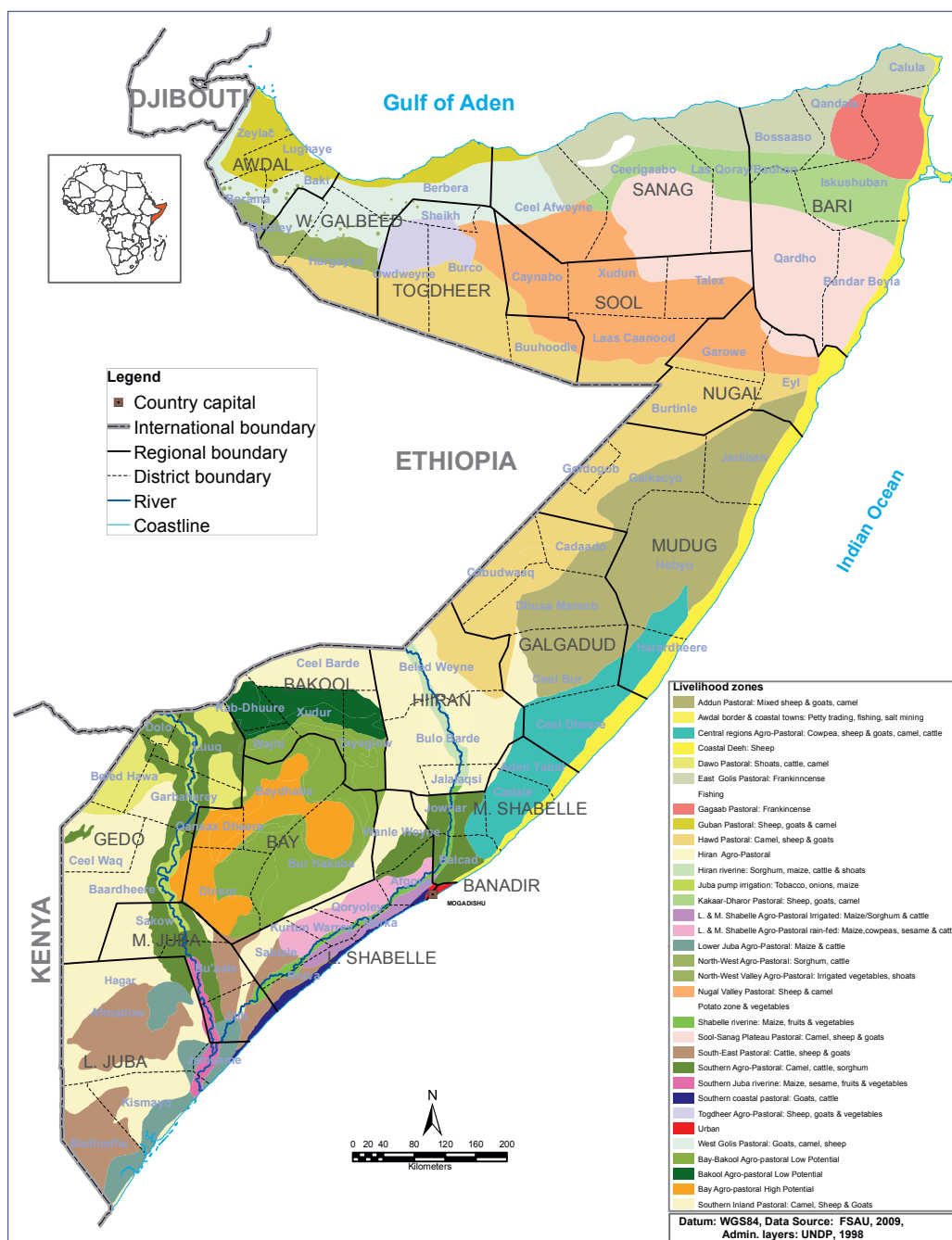
Food security situation in the South has improved considerably during last *Deyr* due to overall above average seasonal performance. This improvements continued in the last three months with the mild *Jilaal* dry season owing to moderate to above normal rainfall received in most parts in late February - early March 2010. The rainfall has positively impacted pasture/browse, water and crop conditions. The reduced water stress and recovered rangeland in key pastoral areas, have contributed to improved livestock body condition, production (milk) and conception levels, and reduced livestock migration. Local quality goat prices have increased in the last three months in most main markets of the Sorghum Belt, including Beletweyne (39%), Luuq (30%) and Xudur (11%), while the prices were comparable in Shabelle regions. However, the prices have slightly reduced in Juba regions (7%) due to high tension in Juba regions and Mogadishu in the reporting period restricting trade movement.



Improved Rangeland Condition - Lagalaay village, Rabdhurre, Bakool Region, Mar '10

Intensified agricultural activities for off-season crop harvesting in Juba regions and early *Gu* planting preparation have increased farm labour opportunities and contributed to labour wage increases in most agropastoral and riverine areas. However, the increased labour wages and local goat prices did not contribute much to the improvement of purchasing power of rural households in the South due to increased cereal prices. This increase resulted from low supplies following below normal *Deyr* cereal production in the regions of Gedo, Hiran, Lower Shabelle, Middle Shabelle and parts of Bakool, discontinuation of food aid distribution to IDPs in Afgoye corridor and increased insecurity (Lower Juba, Middle Shabelle and Mogadishu) affecting trade movements. Therefore, the ToT have reduced in Shabelle, Juba and Gedo regions for local quality goat/cereal as well as labour wage/cereal. Conversely, the ToT has improved in other markets, including Baidoa (Bay), Beletweyne (Hiran) and Xudur (Bakool) (See Agriculture Sector).

SOMALIA LIVELIHOOD ZONES



Recent publications and releases

FSNAU/FEWSNET Market Data Update, March 2010

FSNAU/FEWSNET Climate Data Update, March 2010

FSNAU Technical Series Report, Post Deyr 2009/10 Analysis, March 2010

FSNAU Technical Series Report, Nutrition Situation Post Deyr 2009/10, February 2010

NOTE: The above publications and releases are available on the FSNAU website: www.fsnausomali.org



Technical &
Managerial Support



European
Commission



Funding Agencies

