

Highlights

Climate

Markets

Nutrition

Agriculture

Livestock

Emerging
Regional
Issues

Political Developments: The Somali Federal Transitional Government's plan to relocate to Baidoa and Jowhar sparked civil insecurity and political tensions within Bay and Bakool region during the third week of March. This civil insecurity created internal displacement and problems of water, pasture and market accessibility. Moreover, it disrupted humanitarian access to the region and crucial land preparation activities for the *Gu* 2005 season.

Climate: Normally, March is the last and harshest part of the long dry *Jillaal* season. This year, however, light rains fell over many parts of the country during this month, thus ensuring a fairly mild *Jillaal* season in many areas. These early rains, locally known as *Todob* or *Jar*, indicate that the *Gu* 2005 rains may start early and will likely be normal (page 2).

Markets: Both the Somali and Somaliland Shilling exchange rates remained stable against the dollar through March, i.e. approximately 15,400 SOSH/US\$ and 6,200 SLSH/\$US. Imported commodity prices also remained fairly stable, as they are closely linked to exchange rate fluctuations. Imported commodity prices may increase in inland markets, however, if the coming *Gu* rains result in impassable roads and increased transportation costs (page 2).

Nutrition: The sentinel sites surveillance in Lower Nugal indicate an overall decline in levels of malnutrition while the rates in Sool plateau stabilized at critical levels. The malnutrition rate in northeastern Somalia is within the usual range despite the multiple shocks encountered by the population. High numbers of severely malnourished children continue to be admitted to the TFC in Belet-Hawa, Gedo (page 2).

Agriculture: In the northwest, maize crop planting is almost complete and land preparations for long cycle sorghum varieties has started. In Shabelle Valley, off-season maize production is at different stages of growth and harvesting is expected to continue through mid-April. In Juba Valley, off-season crop conditions are extremely poor due to dry weather and high infestation of insects and disease. Land preparations for *Gu* season have begun in most agricultural areas in the south in response to light rains received in March. If the *Gu* rains start on time, some remaining off-season crops in Juba and Shabelle maybe spoiled (page 3).

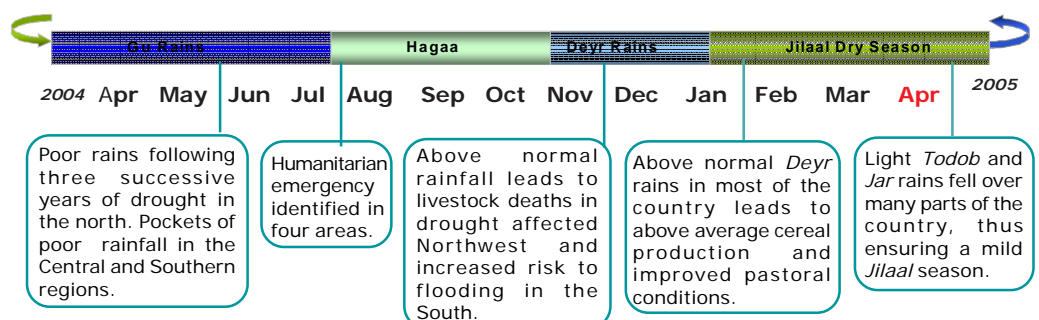
Livestock: Water and pasture conditions improved in many parts of the country following the onset of the early *Todob* and *Jar* rains. Livestock migration from dry areas to wetter areas is reported throughout the country, as well as calving and kidding of livestock and increased milk availability. The total number of sheep/goats exported fell and their price declined in March, as expected due to the end of the peak *Hajj* season (page 3).

Emerging Regional Issues:

- Light rains fell in the **northeastern pastoral Humanitarian Emergency areas**, improving water and pasture conditions. However, despite the rains destitution and pastoral vulnerability remains high in the region (page 4).
- Renewed clan fighting in parts of the **Central Regions** exacerbated the critical food security situation and resulted in a further loss of lives and assets and disrupted trade in Hobyo and Harardere districts. Most of the affected region did not receive rain in March and reports indicate that water shortages persist due to dry water catchments and poorly functioning boreholes (page 4).
- **Shabelle river** level rose gradually during the last dekad of March following rains in Ethiopia, thus easing irrigation operations. The water level of the **Juba river**, however, remained low making gravity and pump irrigation difficult (page 4).

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Somalia Seasonal Timeline & Key Events

Climate

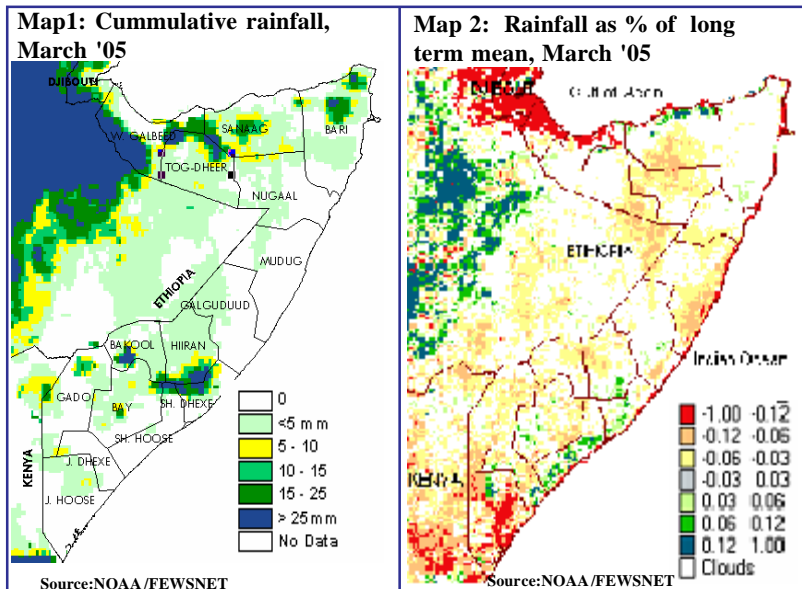
Normally, March is the last and the harshest part of the long dry *Jilaal* season in Somalia. However, Meteosat Satellite Imagery shows and field reports confirm that light rains fell over many parts of the country (Figure 1). These rains, locally known as *Todob* or *Jar*, indicate that the *Gu* 2005 rains may start early and will likely be normal.

In the Northwest and parts of Awdal region, substantial amount of rainfall (over 60mm) fell over agropastoral areas during the last dekad of March. Similarly the Hawd of Hargeisa and the border areas with Ethiopia received good rains, which replenished water sources. These rains are expected to improve pasture and browsing conditions over the coming weeks.

Parts of Sool, Bari, Nugaal and Togdher regions also received good rains, which further improved livestock condition.

In the south, Middle Shabelle Valley received over 25mm of rainfall, which improved the performance of the off-season crops. Field reports also confirm that Shabelle River has started to rise, thus easing irrigation constraints. Bay, Bakol, Gedo and Juba Valley received light showers, which were beneficial for the livestock in terms of improved pasture.

The Normalized Difference Vegetation Index (NDVI) from JRC-MARS shows that the 'greenness' in most of the pastoral areas including Sool Plateau and Nugal Valley remained normal or slightly above average during the *Jilaal* season (see FSAU Climate Data Update, April 2005).



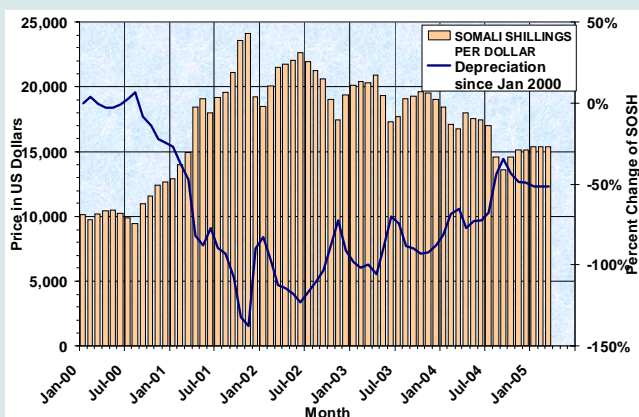
Markets

The Somali shilling exchange rate against the dollar remained fairly stable in March 2005. For instance, in Mogadishu's main Bakara market, the Somalia shilling was 15,367 SOSH/US\$ in February and 15,375 SOSH/US\$ in March 2005 (see Figure 1). However, the Somali shilling is still lower in value than it was in January 2000, by about 52 percent. The Somaliland shilling also remained fairly stable during March, increasing only slightly to 6,200 SLSH/US\$ in March 2005 from 6,150 SLSH/US\$ in February 2005. The Somaliland shilling is currently lower in value by 125% than its value in January 2000.

Imported commodities are closely linked with the exchange rate, therefore imported commodity prices remained stable during March in most markets throughout Somalia and Somaliland. Imported commodity prices, however, may increase in markets that are far from the major ports (i.e. Mogadishu, Berbera and Bossaso) in the coming months, as market supplies may be limited or more costly due to impassable roads because of the *Gu* rains or increasing political tension.

For more details see *FSAU/FEWSNET Market Data Update, April 2005*.

Figure 1: Fluctuation of Somali Shilling in Mogadishu Market, March 2005



Nutrition

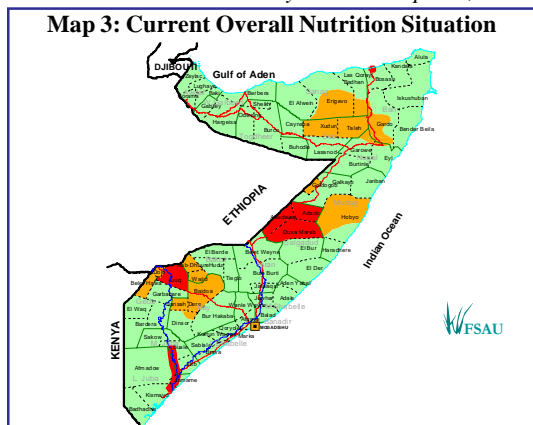
In Northern Gedo, poor nutrition situation continues and Belet-Hawa therapeutic feeding centre admissions remain high (about 50 per month). Food insecurity, diseases, limited diet variety, poor sanitation, poor water quality and limited humanitarian access due to insecurity are some of the factors associated with the critical nutrition situation (over 20% global acute malnutrition rates) in Northern Gedo.

Lower Nugal: Malnutrition levels in northwestern sentinel sites declined significantly in January/February as compared to November, but are still above the usual range (Map 3). Diarrhea was significantly associated with cases of malnutrition, while improvements were associated with reduced levels of morbidity, slight improvements in food security, improved water availability, return of destitute families, and continued social support and humanitarian assistance.

Sool Plateau: Malnutrition levels in northwestern sentinel sites stabilized in January as compared to November, but are still above usual levels.

In the **Northeastern Somalia** sentinel sites, malnutrition levels, with the exception of one sentinel site (Budunbuto), were lower or within the usual range in February 2005. Humanitarian interventions and extreme coping strategies significantly contributed to the low malnutrition rates.

For more details see *FSAU Monthly Nutrition Update, March 2005*.



Agriculture

Scattered and localized rains fell throughout parts of the country (*Jar* or *Todob* rains) offer a promising sign for agriculture and indicate a possible early start of the *Gu* 2005 rains.

In most agro-pastoralists areas of the northwest, farmers have almost completed maize crop planting and have started land preparations for long cycle sorghum varieties. Maize crops have already germinated and are in good condition. Cereal prices and terms of trade (cereal to labour) have remained fairly stable over the last three months (Figure 2 and 3).

In Shabelle Valley, off-season maize production is at different stages of growth and harvesting is expected to continue until mid-April. Late sown off-season sesame, however, may be damaged if it overlaps with the start of the *Gu* 2005 rainy season. In response to the *Jar* rains, agricultural activities are in progress and include land preparation, desilting primary canals, wet sowing of irrigated maize and ridging in rainfed farms for moisture conservation. Ongoing agricultural activities are providing opportunities for labour and increased income. Maize prices increased by 28% in March from February, due to the *Deyr* 2004/05 maize crop losses (Figure 2). Prices are likely to continue to increase through the mid-*Gu* 2005 when the performance of this season's maize will be clear. Alternatively, cheap sorghum is available in the markets at 1,500 SOSH/kg.

In Juba Valley, off-season crop harvest is well below expectations. Crop conditions in the dhesheks are extremely poor due to prolonged dry weather and infestation of insects and disease. Standing crops, mainly sesame, are at different developmental stages. If the *Gu* 2005 rains start on time, 15-20% of the off-season crops may be harvested, while the remaining 80-85% may face spoilage. Poor households who depend on food purchases are getting some income from agricultural labour, land preparation, harvesting and sale of vegetables.

In the Sorghum Belt, agricultural activities have started in anticipation of the coming *Gu* 2005 rains, with the exception of

Figure 2: Average Monthly Cereal Prices (US\$)

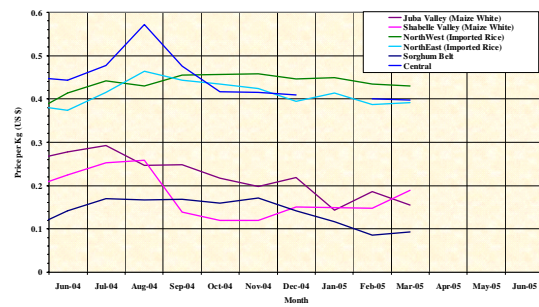
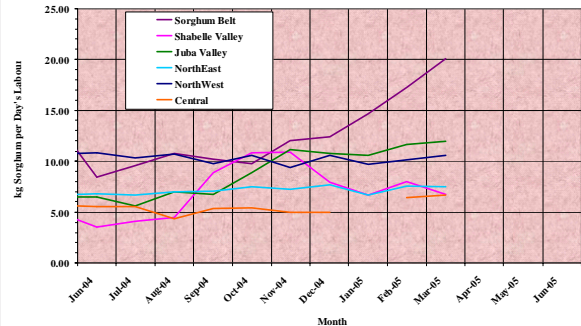


Figure 3: Average Monthly Terms of Trade (Cereal To Labour)



* North and Central - Bossaso, Garowe, Galkayo, Hargesia, Lasanod; Juba Valley - Afmadow, Buale, Kismayo, Jamame, Hagar; Sorghum Belt - Bardera, Belet Weyne, Hudur, Baidoa; Shabelle Valley - Afgoye, Merka, Qoryoley, Jowhar

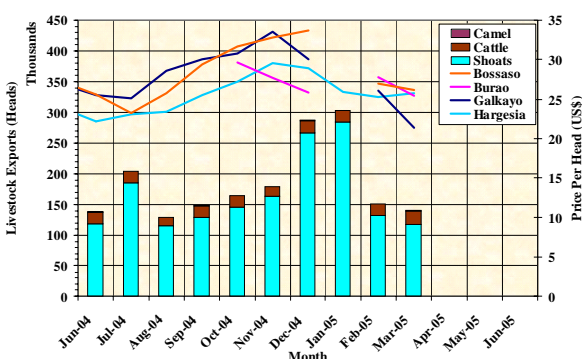
conflict prone areas like Baidoa, Elberde and Rabdhure districts of Bay and Bakool regions. Sorghum prices continue to decline in most of the main markets. Sorghum prices are 6% lower than last month, but are 23% lower than they were in March last year (see FSAU/FEWSNET Market Update, April 2005). Lower sorghum prices combined with higher average wage labor rates in urban towns dramatically improved terms of trade between sorghum and wage labour (Figure 2 and 3).

Livestock

In March, water and pasture conditions improved in many parts of the country following the onset of the early rains, locally known as *Jar* or *Todob*. Livestock migration from dry areas to wetter areas was reported in many parts of the country, as well as calving and kidding of livestock and increased availability of milk.

In the northern regions, calving and kidding of livestock has started in many areas. In the Sool region, goat kidding is expected to increase with the coming *Gu* rains and as much as 60-65% lambing is expected in the next 2-3 weeks. Camel milk is available in Lower Nugal, which has improved the food security situation in the area. Despite the good conditions of water and pasture,

Figure 4: Livestock Exports from Berbera and Bossaso and Export Quality Prices



destitution rates and pastoral vulnerability remains high in Bari, Mudug, Nugal, Sanaag, Sool, and Togdheer regions.

A rapid inter-agency situation assessment to the coastal areas of Awdal region (March 20-23, 2005), reported that livestock body conditions had worsened due to the limited pasture and water resources which were depleted by the influx of Ethiopian livestock during January and February. The inter-agency team reported that the purchasing power of the residents had deteriorated from one shoat for one bag of rice to two shoats for the same bag of rice. Remote sensing data indicates this area missed out on the early *Todob* rains in March (Map 1 and 2).

In most parts of southern Somalia, livestock body conditions generally are normal due to a mild *Jilaal* (dry season) and there are no reports of abnormal livestock migrations. The Central Regions are comparatively drier, milk production is reported to be scarce, and food insecurity is exacerbated by on-going conflicts.

As expected, the total number of shoats exported fell and their price declined in March, following the end of the peak *Hajj* season (Figure 4). A comparison of individual port exports, however, shows that livestock exported from Bossaso increased from 70,834 shoats in February to 98,207 in March (an increase of 38.6%), from 8,658 cattle to 8,740 (an increase of 1%), and from 128 camels to 1,087 (an increase of 749%). Shoat exports from Berbera port decreased from 60,556 in February to 19,749 in March (a decline of 67%). Cattle exports increased from 11,303 to 12,934 during the same period. There were no camel exports from Berbera since January 2005 (see FSAU, Market Data Update, April 2005).

Integrated Food Security Analysis: Emerging Regional Issues

emerging regional issues

Northwest

Good *Todob* rains fell in March, replenishing pasture and improving water conditions, particularly in Borama, Baki and Gebiley districts. Prevailing pasture and water improvements attracted livestock from other areas, including across the border with Ethiopia. Togdheer remained fairly dry and hot. Calving and kidding is reported in most areas of the region, indicating improvement in the food security situation. Maize crops were planted in Gebiley agropastoral areas and good germination is reported.

Northeast

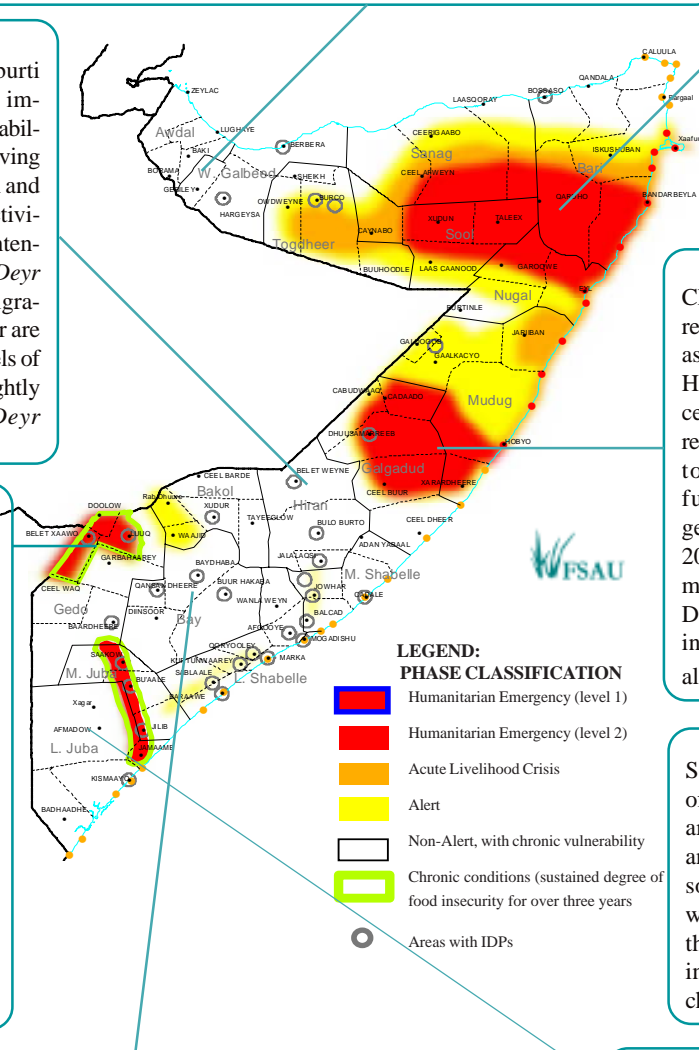
Water and pasture conditions improved due to *Todob* rains in Gebi Valley, Golis Mountains and in parts of Sool Plateau, Lower Nugal Valley of Talex district, Nobiir, Karkaar, Uur-caleed, and along the coastal area of Eyl and Dangoroyo districts. Calving and kidding is reported in most areas. Despite the rains, destitution and pastoral vulnerability remains high in the region.

Hiran

Localized showers fell in B/burti and Jalalaqsi districts further improving pasture and water availability. River level increased improving water consumption for human and irrigation. Land preparation activities in rainfed areas have not intensified as usual due to delayed *Deyr* harvest. Seasonal livestock migrations to fresh pasture and water are reported in pastoral areas. Levels of indebtedness of the poor have slightly reduced due to the good *Deyr* harvest.

Gedo

Clan conflicts erupted in El Wak, resulting in loss of lives and displacement during the first week of April. The triangle between Burdubo, Luq and Garbaharey remains tense due to conflicts. Light rains fell in some areas improving water availability and pasture. Prices of sorghum and maize increased by 13-28% in Bardere, Burdubo and Garbaharey districts compared to last month. In El-wak, sorghum price fell by 15%, mainly due to food distribution during the month.



LEGEND:
PHASE CLASSIFICATION

- Humanitarian Emergency (level 1)
- Humanitarian Emergency (level 2)
- Acute Livelihood Crisis
- Alert
- Non-Alert, with chronic vulnerability
- Chronic conditions (sustained degree of food insecurity for over three years)
- Areas with IDPs

Central

Clan fighting continued in the region and resulted in loss of human lives and assets, as well as disrupted trade, particularly in Hobyso and Harardere districts. Another ceasefire was signed, but the situation remains tense. Water shortages persist due to drying water catchments, poor functioning boreholes and broken generators. Water prices increased to 15-20,000 SOSH/barrel compared to last month's price of 10-17,000 SOSH/barrel. Dry sowing cowpeas and sorghum intercropping with watermelon started along the coastal areas.

Shabelle

Seasonal crop overlap is expected due to off-season crops still standing in many areas. Land preparation, canal desilting and irrigated maize planting is reported in some villages along the Shabelle River where the river level rose gradually during the last decade of March. Maize prices increased 18- 20% over last month, but cheap sorghum is available in the markets.

Bay and Bakool

Political tensions remain high after fighting erupted in Baidoa on 19th March 2005. Similar clan conflict on natural resource based issues is reported in Rabdhure district of Bakool and Idale and Oflow of Bay region resulting in business interruptions, delay in *Gu* season land preparations and presence of over 250 IDPs in Burduhunle of Wajid district. Militia checkpoints increased along the road between Mogadishu and Baidoa.

Cheap sorghum is readily available in the markets and prices declined by 6% from February. Water availability and accessibility remains good, except for Dinsor and many villages in Wajid where prices jumped from 1,000 to 3,000 SOSH/20 litres, due to dry water catchments. Water prices also doubled in Ufurow (Kanshadere) from 500 to 1,000 SOSH per 20 litres.

Juba

A strong cyclone wind coupled with heavy rains destroyed 40-45 buildings in Hagar town and surrounding villages. Unlike Shabelle River, the Juba River level remained low making gravity and pump irrigation operations difficult. Afmadow and Hagar districts received good showers that began to rejuvenate dry pastures. Dry *Gu* season planting is concurrently ongoing with harvesting of off-season crops in the dhesheks. Land preparations in rainfed farming areas began in late March.

FSAU's website: FSAU's website will be launched in mid-April (www.fsasomalia.org)

Recent Reports: FSAU launches two new monthly market and climate data publications April 13, 2005.

FSAU/FEWSNET Market Data Update, April 2005.

FSAU/FEWSNET Climate Data Update, April 2005.

FSAU Nutrition Update, April 2005.

FEWSNET Food Security Alert Update, April 15, 2005; FEWSNET Trip Report to Juba Region, April 16, 2005.

**** Agencies are encouraged to submit information on reports, surveys and forthcoming workshops to be highlighted in this section****



Technical and Managerial Support



Funding Agencies



Technical Partners

