

Food Security & Nutrition

Special Brief - Post *Gu* '07 Analysis

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

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This special FSAU brief provides a summary of the key findings of the post *Gu* 2007 Assessment and Analysis, which are the result of fieldwork (June 25– July 15), regional and national analysis workshops (July 15 – August 4) and a technical verification and partner vetting meeting (August 9). FEWS NET Somalia along with 36 partners, including regional authorities, UN and international agencies, and local and international NGOs participated and supported in this Post *Gu* assessment and analysis process.

FSAU and FEWS NET jointly issued a press release of key findings on August 13, which led to three radio interviews: BBC World (August 15), Voice of America (August 17) and Deutsche Welle (August 17). Presentations of the results were made in Nairobi at a Somalia Support Secretariat Special Meeting (August 13), and are scheduled for the UNOCHA IASC Donor Briefing (August 28) and Somalia Consolidated Appeal (CAP) Launch (September 4). Somalia Regional presentations were made in Garowe (August 16), Dolo (August 19), Hargeisa (August 20), Baidoa (August 21), Belet Weyn (August 23) and Buale (August 23). The press release, radio interviews and presentation, in addition to the Phase Classification Map, estimated population numbers by region, district and livelihood zone, are all available on the FSAU website.

KEY FINDINGS

Based on the post *Gu* '07 seasonal assessment, the Food Security Analysis Unit (FAO/ FSAU) and FEWS NET, confirm that the food security situation in most of the drought and flood affected regions, including Juba and Gedo, has improved. However the overall number of people in need of assistance in Somalia has increased since March due to the significant deterioration in the humanitarian situation in the Shabelle regions. The number of people in need of humanitarian assistance has increased 50% since the post Deyr '06/07, from **1 million** to **1.5 million people**. Of this 1.5 million, **295,000 are in Humanitarian Emergency (HE)** requiring life saving interventions while **490,000 are in Acute Food and Livelihood Crisis (AFLC)** requiring livelihood support. In addition, there are 325,000 people who are newly displaced from Mogadishu and 400,000 already displaced requiring both life and livelihood saving interventions (Map 1 and Table 1).

Most or 85% of those identified in **Humanitarian Emergency** and 31% identified in **Acute Food and Livelihood Crisis** are in Lower and Middle Shabelle regions. This represents 250,000 and 150,000 people, respectively, and includes agropastoral (41%), rainfed flood irrigated (32%), and riverine (22%) populations. The Shabelle regions, generally are one of the most resilient regions and the 'bread basket' of southern Somalia, are reeling from the impact of multiple shocks, including the lowest cereal crop production in a decade (44% of Post War Average) due to below normal *Gu* season rains and damaged irrigation infrastructure, sharp rates of inflation in food and non-food items (40% to 60% increases in last three months), disruptions in trade and economic activities, a high and increasing concentration of displaced population fleeing from Mogadishu, deteriorating health conditions following an Acute Watery Diarrhoea (AWD) outbreak, and continuing and escalating civil insecurity.

The Shabelle regions are also hosting 83,000 newly displaced IDPs, and it is estimated that roughly 30% of those still within Mogadishu, are also experiencing a deterioration in their food, livelihood and nutrition security. Recent nutrition surveys confirm that the global acute malnutrition (GAM) rates in Shabelle region are currently above emergency threshold levels (> 15%), with alarmingly high rates of severe acute malnutrition (SAM)(> 4.0%). The areas in and around Mogadishu continue to experience inter-clan tension, roadblocks, resource based conflicts (including tenure conflicts), and escalating violence (including assassinations, road side bombs and human rights abuses). All of these shocks in a short period of time have resulted in a **sudden on-set Humanitarian Emergency** affecting more than 600,000 people in the Lower and Middle Shabelle and Mogadishu.

In Hiran the food and livelihood security situation for the riverine and agropastoralists continues to deteriorate. There are 15,000 people identified in **Humanitarian Emergency** and 30,000 in **Acute Food and Livelihood Crisis**, of which 46% are riverine households and 54% are agro-pastoral households. Hiran is also hosting 13% of the new IDPs from Mogadishu (42,000). On-going insecurity and tension is making access and mobility difficult in this region and recent resource based conflicts in the pastoral areas bordering Galgadud region are placing populations at a greater risk to a further deterioration in the situation.

The Central regions continue to support the largest concentration of new IDPs from Mogadishu, especially in Galgadud (110,000), and Mudug (41,000) regions. The post *Gu* 2007 IDP Impact Survey results indicate that the conditions of IDPs in these regions reflect **Humanitarian Emergency and Acute Food and Livelihood Crisis** phase levels in terms of concentration of IDPs relative to the host communities, inadequate access to clean water, health care services, food access constraints due to loss of livelihoods with high inflation in staple and non-staple food, and limited social support. Five months after the initial wave of displacement, there is very little incentive for IDPs to go back to Mogadishu. While host communities in these regions are still classified as **Chronically Food Insecure**, the early warning (for a worsening phase) was been changed from **Alert** to **Moderate Risk**. Resource based conflict and clan tensions in Galgadud are increasing and continuing to impact negatively on populations, restrict livestock migration, spur population movements and disrupt trade flows.

In Gedo region, there has been some improvement since the Deyr '06/07, however, there are still 30,000 people estimated to be in **Humanitarian Emergency**, and a further 80,000 in **Acute Food Security and Livelihood Crisis** (Deyr '06/07 110,000 in HE and 90,000 in AFLC). In Lower and Middle Juba regions, there has been a significant improvement for all livelihood groups due to a notable recovery of livestock herd sizes, sheep/goats and camel in particular, improved availability of milk and meat, high livestock prices, improved cereal production, high and improved terms of trade, and an increased availability of job and earning opportunities in riverine areas, including fishing in the Desheks. The overall nutrition situation in the Middle and Lower Juba Regions since the Deyr '06/07, also indicates an improvement from *Very Critical* to *Critical* levels in the riverine livelihood zone, while in the pastoral and agro-pastoral livelihoods, the situation has improved from *Critical* to *Serious*. As a result, those previously in **Humanitarian Emergency** are now in **Acute Food and Livelihood Crisis**, and some of those previously in Acute and Food and Livelihood are now **Chronically Food Insecure**. The number of people in **Acute Food and Livelihood Crisis** from July to December 2007 in Lower and Middle Juba is estimated at 145,000 (as compared to Deyr '06/07 170,000 in AFLC and 110,000 in HE). Despite these improvements, there is still a *Critical* need in these regions for strategic sector interventions to assist the recovery of livelihoods and address underlying chronic problems of access to clean water, health care and poor caring practices. Without this strategic and timely response the communities will continue to be vulnerable to a humanitarian crises in the coming year.

Implications for Action:

□ Urgent Need For Integrated and Focused Response in the Shabelle Regions

Given the magnitude of the humanitarian crisis in Mogadishu and Lower and Middle Shabelle, and the cross-cutting crisis for rural populations and new IDPs, there is a need for urgent integrated and complementary humanitarian assistance focused on immediate needs, including food, clean water, health services, and sanitation, integrated with activities to support livelihoods and protect livelihood assets to ensure future recovery (e.g. works programs to rehabilitate irrigation infrastructure before the next seasonal rains and to improve access to clean and safe water for human consumption). At the same time, there is a need for increased advocacy at all levels for the cessation of conflict, civil insecurity and political instability – this is *Critical* to allow greater humanitarian access, to encourage the resumption of economic activities, and to prevent a further slide into an even greater humanitarian crisis of increased magnitude and scale.

More generally, for those populations in:

- **Humanitarian Emergency (HE):** Urgent complementary interventions focusing on **immediate needs**, including increased access to food and other sector support as needed (e.g. water, health and sanitation). Immediate protection against the complete **loss of livelihood assets** to ensure future recovery.
- **Acute Food and Livelihood Crisis (AFLC):** Immediate **interventions to support livelihoods** to either halt the stripping of, or help the recovery of livelihood assets, e.g. strategic sector interventions such as repair or maintenance of boreholes, water catchments, irrigation infrastructure, improved access to health services, clean water, increased access to credit or debt repayment.
- **Chronically Food Insecure Areas:** Although immediate humanitarian and livelihood support is not required, these areas require urgent **strategic interventions to improve their resilience to reduce risks and vulnerabilities** to future shocks. Readdress structural hindrances to achieving adequate food, nutrition and livelihood security, and address the underlying causes of chronically high malnutrition levels, e.g. improved dietary diversity, access to health care, clean water, and improve caring practices.

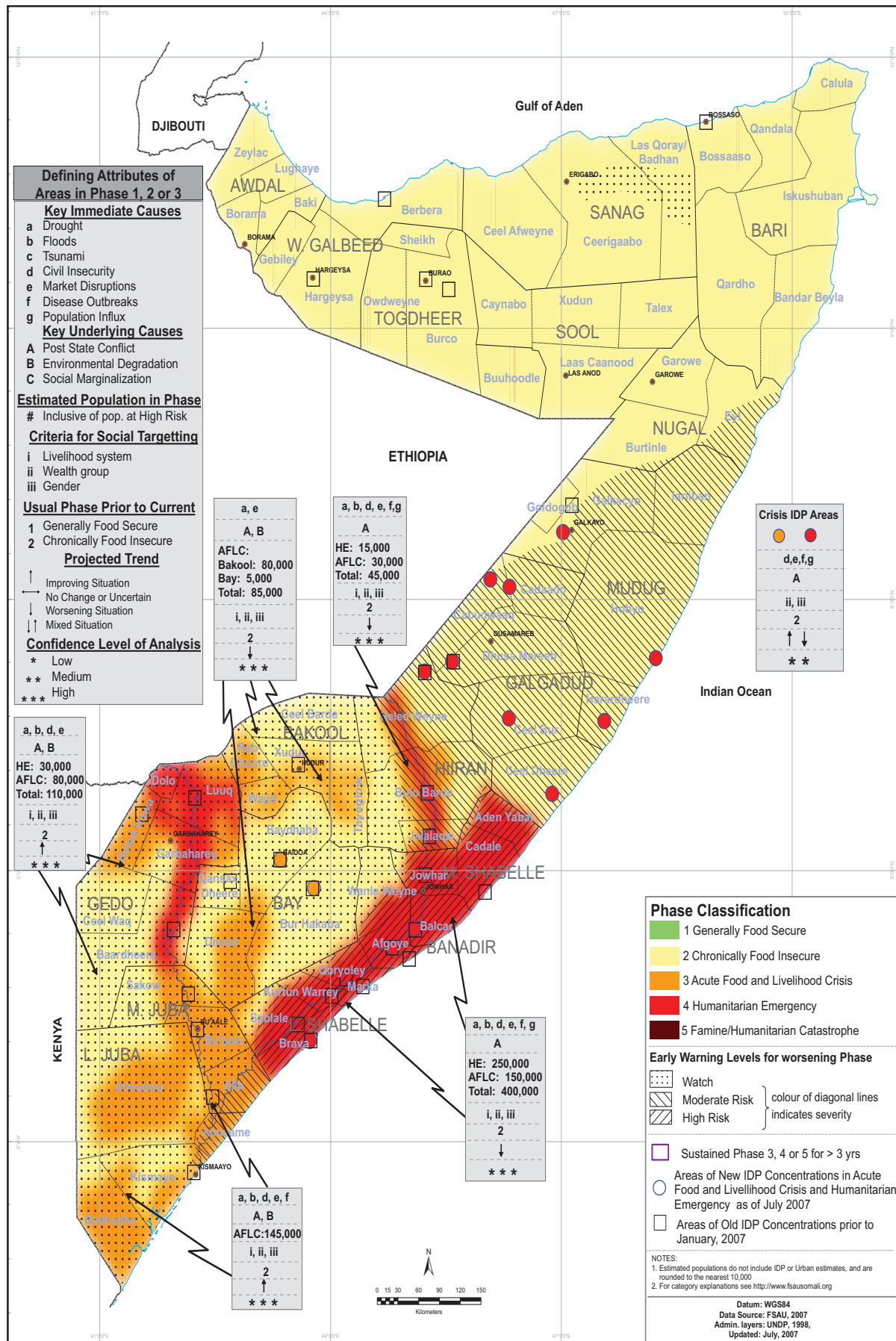
Table 1: Estimated Rural Population by Region in Humanitarian Emergency (HE) and Acute Food and Livelihood Crisis (AFLC), inclusive of the High Risk Groups.

Affected Regions	UNDP 2005 Total Population ¹	Assessed and Contingency Population in AFLC and HE		
		Acute Food and Livelihood Crisis (AFLC) ²	Humanitarian Emergency (HE) ²	Total in AFLC or HE as % of Region population
North³	2,341,718	0	0	0
Central	680,156	0	0	0
South				0
Bakool	310,627	80,000	0	26
Bay	620,562	5,000	0	1
Gedo	328,378	80,000	30,000	33
Hiraan	329,811	30,000	15,000	14
Juba Dhexe (Middle)	238,877	65,000	0	27
Juba Hoose (Lower)	385,790	80,000	0	21
Shabelle Dhexe (Middle)	514,901	60,000	85,000	28
Shabelle Hoose (Lower)	850,651	90,000	165,000	30
Sub-Total (South)	3,579,597	490,000	295,000	22
Banadir	901,183	-	-	-
GRAND TOTAL	7,502,654	490,000	295,000	10

Assessed Rural population in AFLC or HE	785,000	10⁵
Estimated number of new IDPs since April 2007	325,000	4⁵
Estimated number of old IDPs	400,000⁴	5⁵
Estimated total population in crisis	1,510,000	20⁵

See FSAU website Population Table for footnotes and references.

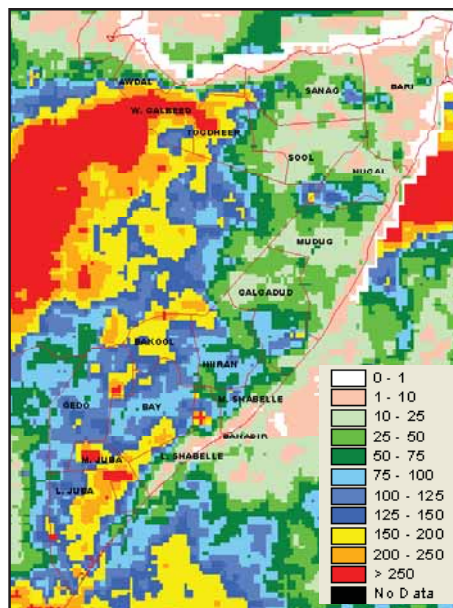
Map 1: Somalia Integrated Food Security and Humanitarian Phase Classification: Post Gu '07 Projection, July through December 2007



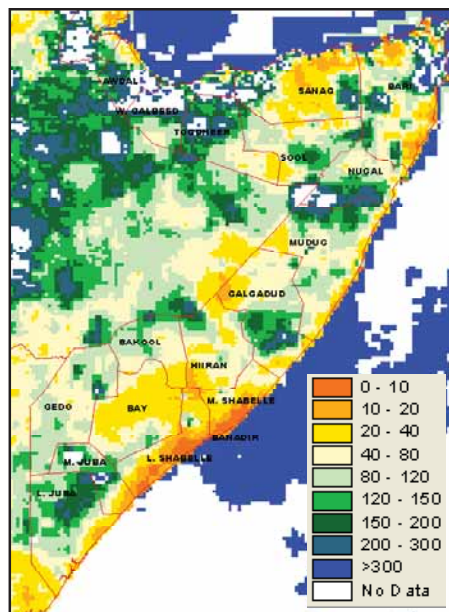
post gu '07 integrated phase classification map

SECTOR HIGHLIGHTS

**Map 2: Gu '07 Cumulative Rainfall (mm),
March 20th – June 30th '07**



**Map 3: Gu '07 Rainfall as % of Long Term
Mean, March 20th – June 30th '07**



Source: USGS/FEWSNET

CLIMATE

The main rainy season of *Gu* '07 started during the second dekad of April in many parts of the country indicating a timely onset. However, a near-normal timely onset of the *Gu* rains in mid-April was severely compromised by poor, erratic and uneven temporal distribution in May and June in many parts of the south and central regions. The performance of the season in terms of intensity, temporal and spatial distribution was poor with parts of many regions receiving below-normal rains during the period from March 20 to June 30, 2007 (Map 2 and 3). In particular, *Gu* rains were poor in the key cropping areas of Shabelle, Hiran, Gedo, Bakool, Bay and Juba regions. With the exception of pockets in Sablale and Qoriyoley districts of Lower Shabelle. *Gu* rains were poor in most of the Shabelle regions.

In Bay and Bakool regions, the *Gu* season rains started on-time, but distribution was poor. Rain gauge data from some of the Sorghum Belt districts in Bay region indicate only a few rainy days confirming that the temporal distribution of the *Gu* rains was poor leading to a long dry spell in most of the region. Information from ground truthing confirm that coastal areas of Juba region, received normal *Gu* rains, however, the northern parts of Lower Juba, key cropping areas of Saakow district in Middle Juba, and the entire Gedo region rains performed poorly. A comparison between the actual and the long term-mean shows that rains received during March 20 to June 30 were below normal for most parts of the country (Map 1 and 2).

In the livestock dependent regions of the northeast, rains started late (mid-May) and generally were on-time in the northwest, with the rainfall distribution over time and space largely normal to near-normal. Galbeed, Awdal and Hawd of Togdheer regions received 125-250 mm, which is greater than 120 percent of long-term mean. However, the performance of the *Gu* season was poor in some parts of eastern Sanaag, pockets in Sool, and Nugal regions, as well as coastal areas of Bari region (Map 2 and 3). Similarly, both Mudug and Galgadud regions, rains were below normal and already water reservoirs and berkads are dry.

In other key pastoral areas, pasture, browse and water are available in most regions, due to the cumulative impact of the normal *Gu* '06 rains followed by very good *Deyr* '06/07 rains, a mild *Jiilaal* '07 dry season and a good onset of the *Gu* '07 rains in mid-April (see livestock section). As a result, the Normalized Difference Vegetation Index (NDVI) shows that fodder and pasture conditions in most key pastoral areas remain above average and are expected to be normal over the coming months (See FSAU Climate Data Update, August 2007).

CIVIL INSECURITY

Although the risk of renewed widespread armed conflict is low, there is increased localized conflict and a continuing deterioration in the security situation in many parts of the country, especially in Shabelle, Hiran and central regions. All indications are that political and clan tensions, civil insecurity, resource based conflicts and disruptions of economic activities will continue to increase in the coming weeks.

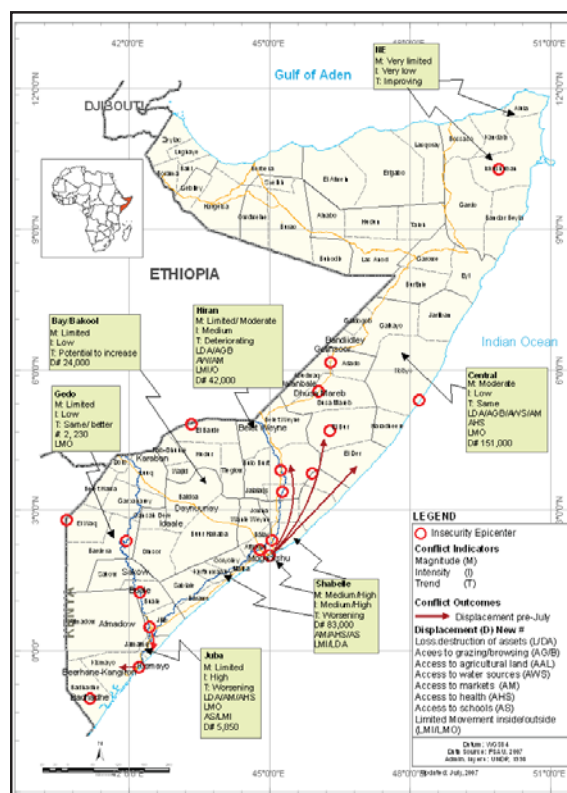
Of particular concern is the continuing instability and insecurity in Mogadishu and surrounding areas, with associated increases in clashes, killings, road blocks, banditry and heightened political tensions between the Transitional Federal Government (TFG) and clan militia. Civil insecurity and conflict in Mogadishu is the key driving factor that has led to the **sudden on-set Humanitarian Emergency** in the Shabelle region as it has disrupted economic activities and led to the loss of jobs, earning opportunities, livelihoods, and coping options for thousands of people who are, at the same time, faced with sharp inflationary price increases for food and non-food commodities.

The continuing disruptions in the activities of the Mogadishu Port and Bakara market is further negatively impacting on the general economy of much of southern and central Somalia, as it is limiting trade flows and market activities. Roadblocks and illegal taxation are further adding to the cost of staple and non-staple foods. Already there are reports that there is a shift in the supply direction of imported commodities from Mogadishu to Bossaso (Map 4).

Conflict in Mogadishu has led to the displacement of more than 400,000 people since February 2007 (UN Protection Cluster, July 2007), and resulted in the establishment of several new IDP settlements on the outskirts of Mogadishu and in other locations in Lower and Middle Shabelle, Central, Hiran and Bay regions (see IDP section). The uncertainty of the security situation is causing a large influx of people in and out of Mogadishu, as residents try to protect their assets they left behind, as well as ensure family members are in a relatively safe environment, even if they lack access to basic services, such as clean water, health services and proper shelter. This high level of population influx and displacement is further causing problems of tenure, poor hygiene, overstretched coping options, and competition over resources affecting the newly displaced populations, the host communities, and rural communities in areas of crisis.

The direct and indirect impacts of increased localized insecurity will continue to negatively affect the food, livelihood and nutrition security of the rural and urban populations in many parts of the south and central regions and must be closely monitored. Mogadishu and the Lower and Middle Shabelle regions are identified as facing the greatest risk to a worsening situation which is already identified as a **Humanitarian Emergency**. Parts of central region and the area between the coast and main road linking Lower Shabelle and Kismayo town are also of heightened concern and will be monitored closely.

Map 4: Somalia - Insecurity Outcomes May - July Dec, '07



Source: FSAU Post Gu '07 Assessment



IDPs Jowhar, M. Shabelle 2007

IDP CRISIS FOR MORE THAN 300,000 PEOPLE

The conflict and civil insecurity in Mogadishu since early 2007 has led to the displacement of hundreds of thousands of Mogadishu residents out of the city, as well as displaced people within Mogadishu city itself. According to the UN Protection Cluster tracking figures, the initial wave of new IDPs leaving Mogadishu resulted in over 400,000 people seeking refuge in the regions of Shabelle, Bay, Hiran, Mudug and Galgadud between February and May 2007.

Between May and June, a temporary and slight improvement in the security situation in Mogadishu attracted approximately 115,000 people back into Mogadishu. However, a further deterioration in the situation led to a third wave of population displacement, with a reported 30,000 – 40,000 people leaving the city again in July and August 2007. Currently, it is estimated that approximately 325,000 people from Mogadishu are displaced to surrounding regions.

Obtaining exact figures on the number of IDPs is very difficult as the situation is changing on a daily basis, however, it is estimated that most or 86% of those who did return to Mogadishu in May and June 2007, returned from Lower and Middle Shabelle region, being the closest and least costly for transportation. According to the latest estimates the highest concentration of new IDPs is in Galgadud where 110,000 IDPs are located representing 34% of the total new IDP population. Twenty-five percent of the IDPs are in Lower and Middle Shabelle, while Hiran and Mudug have 13% and 12%, respectively.

FSAU and partners conducted an IDP impact assessment as part of the *Gu '07* Assessment field work in regions that had highest numbers of IDPs, including Lower and Middle Shabelle, Hiran, Mudug, Galgadud, and Bay regions. The survey used focus group discussions and key informants to gain an understanding of how IDPs were coping, with particular emphasis on food and income access, as well as availability and access to basic services.

The results of this survey indicated that over 70% of the IDPs are unemployed and over 80% are not receiving remittances. This absence of social support is further compounded by the lack of employment opportunities in host community areas where populations are displaced. For example, in the main agricultural areas, such as the Shabelle regions, the poor *Gu '07* rainfall and cereal production resulted in fewer employment opportunities overall – even for the host communities. The lack of income earning opportunities as well as high and increasing prices of both imported and locally produced food is exacerbating the IDPs' already limited access to food. For example, in the Mudug region the price of rice has increased by 62% above the normal expected seasonal increase since January, and the price of vegetable oil has increased by 71% in Hiran during the same period. The price of maize in the Lower and Middle Shabelle, although only 10% above the July average, is expected to further increase or stay higher than normal in the coming months due to the low production.

An even more worrying situation is that over 80% of the IDPs reported that they do not have access to clean safe water and access to latrines is very poor, especially in the districts, with high concentrations of IDPs. Of particular note is that 30% of the districts that have high IDP numbers and concentrations are also districts classified in **Humanitarian Emergency** (see IPC Map). For further information and results from the *Gu '07* IDP Impact Survey, please contact FSAU.



Kala Goye-camp, Jowhar M.Shabelle: An IDP family eating wild food due to lack of food.



Galgadud, IDPs, June '07.

AGRICULTURE

Table 2: *Gu '07 Cereal Crop Production Estimates - Southern Somalia*

Regions	Gu 2007 Production in MT			Gu 2007 as % of Gu 2006	Gu 2007 as % of Gu PWA (1995-2006)	Gu 2007 as % of Gu Five Year Average (2002-2006)
	Sorghum	Maize	Total Cereal			
Bakool	120	10	130	9%	5%	14%
Bay	2,910	180	3,090	8%	8%	9%
Gedo	10	80	90	2%	1%	2%
Hiraan	1,270	640	1,910	132%	46%	126%
Juba Hoose	20	3,020	3,040	570%	51%	98%
Shabelle Hoose	1,560	25,740	27,300	58%	41%	39%
Juba Dhexe	270	4,780	5,050	460%	55%	108%
Shabelle Dhexe	1,680	6,300	7,980	43%	46%	43%
Gu 2007 Total	7,840	40,750	48,590	43%	31%	36%

Gu '07 cereal production in southern Somalia is estimated at 48,600 MT, of which 84% is maize and 16% sorghum. This is the lowest cereal production in the last thirteen years, representing only 31% of the 1995 to 2006 post-war average (PWA) and 43% of last year's *Gu '06* production (Table 2 and Figure 1). Most of this production is from riverine and irrigated areas, as most rainfed production either failed or was significantly below normal.

Three regions, Gedo, Bakool and Bay, experienced complete crop failure, with cereal production estimated at only 1%, 5% and 8% of *Gu* PWA (1995 – 2006) and 2%, 9% and 8% of last year's *Gu '06* production, respectively. In all other regions in southern Somalia, cereal production was between 40–55% of the *Gu* PWA (1995 – 2006) production. The Shabelle regions, the “maize basket” which supply the bulk of cereal production for southern Somalia, produced only 44% of *Gu* maize PWA (1995-2006) and 60% of *Gu '06* maize.

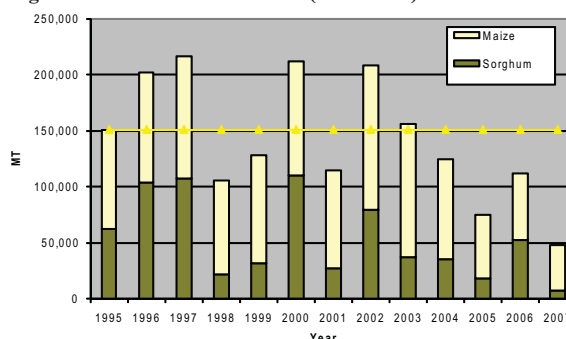
In Lower and Middle Juba and Hiran regions, although this season's cereal production was below normal compared to the PWA (51%, 55% and 46% of PWA, respectively), cereal production was significantly higher than the last *Gu '06* production (570%, 460% and 132% of the *Gu '06* production, respectively) and more than, or near to, the 5-year average 2002-2006 (98%, 108%, and 126%, respectively). This relatively good cereal harvest in Juba and Hiran regions is attributed to near normal *Gu* rains, opportunities for recession cropping, gravity irrigation and the use of pump irrigation. Currently recession planting of maize and sesame is continuing in most parts of the riverine areas of Juba regions. FSAU and partners will carry out an off-season crop assessment in the Juba region in late September.

Gu '07 sorghum production is only 14% of the *Gu* PWA due to the complete crop failure in Bay region following very poor and unevenly distributed *Gu '07* rains. Similarly, maize production, mainly from the riverine areas, is only 44% of *Gu* PWA due to the complete failure of rainfed maize and low production of irrigated maize.

Although, below normal and poorly distributed rainfall was a key factor leading to the poor overall crop production, riverine irrigated maize production could have been significantly greater if irrigation infrastructure and river management were adequate. In the Shabelle region, the bread basket of maize production in the south, unrepaired irrigation infrastructure damaged by last season's *Deyr '06/07* floods were a significant production constraint. In some areas in Kurtunwarey and Qooryole districts in Lower Shabelle, the flood waters from last December still covered several thousand hectares of farm lands, while silted canals, damaged culverts and barrages and river breakages further limited area planted and overall production. Similarly, open river breakages and damaged irrigation systems were also reported as a constraint to production in Juba and Gedo region riverine areas. In Bay region, the largest sorghum producing area, inadequate rainfall was the major constraint, however, other problems reported by farmers included insect and pest damage (stalk borer, Quelea Quelea birds) and plant disease (leaf blight).

In the northwest agro-pastoral areas of Awdal, Galbeed and Togdheer regions, cereal establishment estimates are favorable and expected to be significantly above normal due to the above normal and well distributed rains. The *Gu/Karan* crop establishment survey estimates cereal production at 25,236 MT, which is 141% of PWA (1998 – 2006), 101% of *Gu '06* and 34% of the total cereal production in Somalia in this *Gu '07*. The harvest is expected later this year in November.

Figure 1: *Gu* Cereal Production (1995-2007)



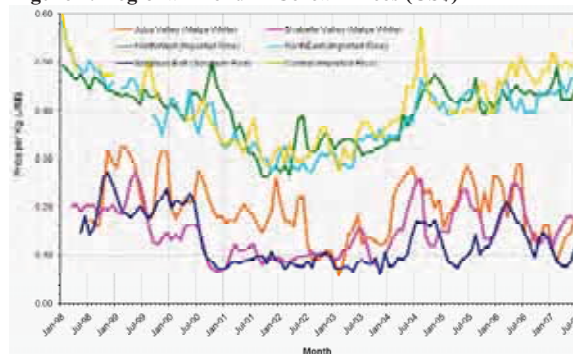
Source: FSAU Post *Gu '07* Crop Survey

Although the specific factors vary by region, FSAU crop production survey and cereal availability analysis, indicates that many rural households in Shabelle, Juba and Bay regions still have some cereal stocks that are estimated to last up to five months or more. The level of domestic cereal stocks in the country is positively correlated with the local production not only for the current season, but also from the preceding growing seasons.

In Bay region cereal stocks are available due to the bumper sorghum harvest last season (*Deyr* '06/07 was 228% of *Deyr* PWA), while in Juba regions it is due to the combination of above normal *Deyr* '06/07 production in some areas, off-season recessionary production (March/April 2007), and near normal production this season, combined with the food aid distributions between March – July 2007. In Shabelle region, middle and better-off households have cereal stocks as below normal production translates into selling less to the market instead of having fewer cereal stocks for own household consumption.

Cereal prices increased significantly throughout most regions since January 2007 following normal seasonal trends, but at higher rates of increase. However, cereal prices are still relatively low or only slightly above normal in most regions (Figure 2). In Shabelle region, the epicenter of the current humanitarian crisis, cereal prices increased due to a combination of low cereal harvest, increasing rural demand due to the presence of large numbers of IDPs, and the depreciation of the Somali Shilling which has resulted in increased costs of production and transportation. In the Shabelle regions, maize prices increased 107% between January and July 2007. However, maize prices are still relatively low and only 10% higher than the average July price for 2002 – 2006.

Figure 2: Regional Trend in Cereal Prices (US\$)



Source: FSAU/FEWSNET Market Data Update, July '07.

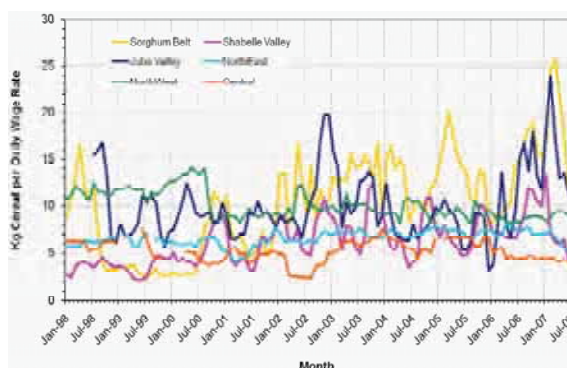
In the Juba regions, similar price increases are noted. For example, maize prices increased by 63% between January and July 2007, however, July 2007 prices are still 25% lower than the July five year average price (2002 – 2006) (Figure 2). Increased off-season *Deyr* '06/07 production, food aid distributions (March-July 2007), favorable *Gu* '07 cereal production and a good prospect of the standing off-season crops are stabilizing cereal prices in this region.

In the Sorghum Belt, including parts of Gedo, Hiran, Bakool and Bay regions where *Gu* harvest was very poor, sorghum prices increased 52% between January and July 2007, but the prevailing sorghum price is only 10% higher than the July '06 price and 12% higher than a five year average of July prices. Assessment results indicate that cereal stocks are high in the region, but opportunistic holding by traders is ongoing expecting prices to increase further.

Over the coming months, price of cereals are expected to continue to increase further due to the overall poor performance of *Gu* '07 season and low cereal supplies. The disruptions of the Bakara market in Mogadishu and restrictions in the inter-regional trade due to increased road blocks and civil insecurity will likely hamper the flow of traded cereals within the country. FSAU will closely monitor the market availability, the flow of cereals and cereal prices in main reference markets in the coming months.

The decline in agricultural activities and associated on-farm labor opportunities due to the *Gu* '07 crop failure resulted in reduced employment and income earning options for poor households. In all southern Somalia regions, loss of income and increases in cereal prices have affected the purchasing power of households (Figure 3). For example, in the Shabelle, Sorghum Belt and Juba regions, the terms of trade (TOT) between labor and cereal dropped by 69%, 31% and 32% between January and July 2007, respectively. Compared to July last year, the TOT between cereals and labor are currently lower in Shabelle Valley, Sorghum Belt and Juba regions by 46%, 23% and 19%, respectively. Close monitoring of on farm labor availability and prices relative to cereal prices will be crucial in the coming months.

Figure 3: Regional Trend in Terms of Trade: Cereal to Labour



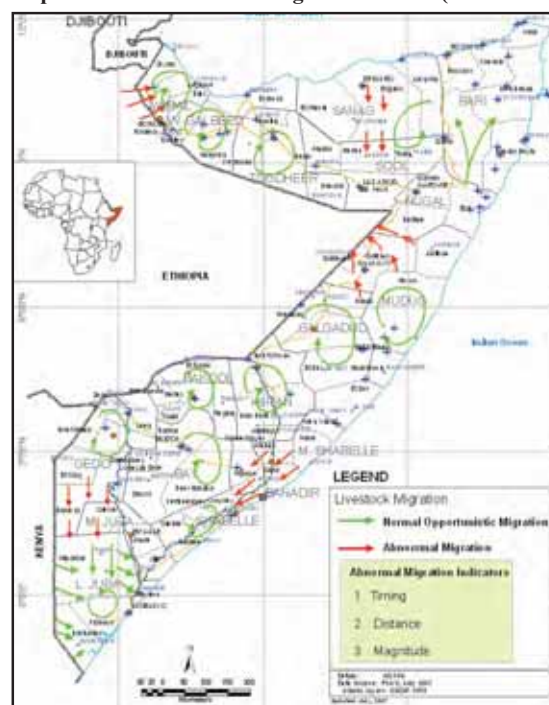
Source: FSAU/FEWSNET Market Data Update, July '07.

LIVESTOCK

Despite the overall poor performance of the *Gu* '07 rains, rangeland conditions in most areas are able to sustain livestock until the next *Deyr* season rains. This is due to the cumulative positive effects of the *Gu* '06, *Deyr* 06/07 and good onset of *Gu* '07 rains that effectively regenerated pasture and recharged underground water sources. Normal to above normal *Gu* '07 rains in parts of Juba, the northeast and the northwest regions resulted in improved rangeland conditions including increased water access in the hinterland. In contrast, other areas are experiencing deterioration in water, pasture and browse conditions. The two areas of greatest concern are the central and Middle Shabelle regions. The berkads and water catchments in Mudug and Galgaduud regions are already dry and water trucking has started two months earlier than normal, while water and pasture shortages in Middle Shabelle are leading to deteriorating livestock conditions and unusual livestock migration to Lower Shabelle.

Livestock migration patterns are normal in most areas, with the exception of some internal opportunistic migration in search of improved water, pasture and browse (Map 5). These areas include livestock migration from eastern Sanaag towards Nugal Valley of Sool region and from north Mudug east of Nugal regions into the Hawd of Goldogob and Burtinle District. In the south, livestock from southern Gedo have seasonally migrated into Juba region where pasture and water availability is better. Limited but normal cross-border livestock migration is reported from Shinnile area of Ethiopia into Guban area of Awdal region.

Map 5: Somalia Livestock Migration Trends (Jul-Oct '07)



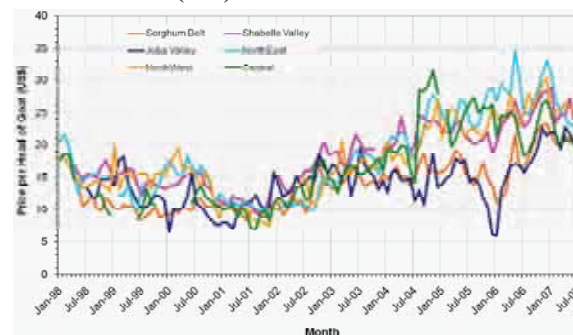
Source: FSAU Post Gu '07 Assessment

Generally, livestock body conditions throughout the country are average to good, though in parts of Middle Shabelle, Hiran, Mudug and Galgaduud regions, livestock body conditions are deteriorating. *Gu* '07 season calving rates for camels and cattle were low in the northwest, northeast, central, Hiran, Gedo and Bakool regions due to the high conception during *Hagaa* '06 (Aug.-Oct.) and *Deyr* '06/07. Consequently milk production is low in these regions. In the Juba, Shabelle and Bay regions, on the other hand, camel and cattle calving rates are normal. Moreover, kidding and lambing of sheep and goats is medium to high in most of the regions. The FSAU *Gu* '07 Assessment Pastoral Herd Dynamics Survey confirms that the herd size for many of the pastoralists and agro-pastoralists have fully recovered from the effects of the 2003/4 drought in the northern regions and the 2005/06 drought in the south and central regions. The exceptions, however, are the Juba Agro-Pastoral and Southern Agro-pastoral in Juba and Gedo regions, the Dawa Cattle Pastoral in Gedo region, and the Southeast Cattle Pastoral in Juba and Bay regions (see FSAU website Livelihoods Map). According to the results of the herd dynamics analysis the cattle pastoral livelihoods will require a minimum of two more seasons of normal rains in order to attain baseline level herd sizes. Generally, there are no outbreaks of any major livestock diseases; however, endemic diseases, such as CCPP, Lumpy Skin Disease (LSD) and tick borne disease continue to affect small ruminants and camels. The unknown camel disease, known now as "Sudden Death Syndrome" (SDS), that was reported during March '07 in the Juba region has subsided and is now reported in the neighboring districts of Kenya.

Livestock prices for all species (camel, cattle, sheep and goats) have increased considerably over the last 12 months and are now at peak levels compared to long term trends due to improved body conditions and increasing export and local demand (Figure 4). The price of cattle in Juba and the Sorghum Belt regions are currently 27% and 26% higher than the five year average (2002-06). Similarly, in the central and northern regions, livestock prices have also continued to increase over the last 12 months. The average price of export quality goats in July were 24% higher when compared to the same month last year. Likewise, export quality goats prices for the central, northeast and northwest regions are 20%, 29% and 43% higher compared to their five year average. Terms of trade for livestock to cereals has fallen since January 2007 due to rising cereal prices, however, it is still very favorable and high compared to the last five years (see FSAU Market Update, July 2007).

The Garissa (Kenya) cattle market is fully functional and field reports confirm that the cross-border cattle trade between southern Somalia and Kenya is ongoing and revived from the effect of the confirmed RVF outbreak in Kenya and the Kenya Somali border closure earlier this year. Similarly, despite the livestock ban of live animals from Somalia to the Gulf States earlier this year and problems around export licenses, the total number of sheep and goats exported from Berbera and Bossaso ports between July 2006 to June 2007 was 2,625,51, which is 30% above the five year average of total exported animals. Apart from the Burao abattoir, other slaughter houses in the country (mainly in the south/central) are currently closed and have not been exporting any chilled meat since January '07 due to a combination of the livestock ban and local insecurity.

Figure 4: Regional Trend in Local Quality Goat Prices (US\$)

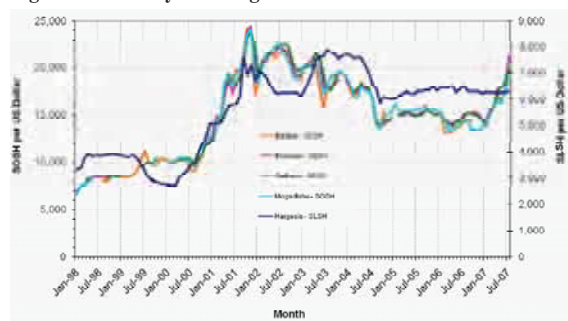


Source: FSAU/FEWSNET Market Update, July '07.

MARKETS

There has been a significant and sharp devaluation, between January, breaking a three year period of relative stability (Figure 5). This sharp devaluation in only six months is due to a combination of increased civil insecurity (notably in the Shabelle), trade disruptions in Mogadishu's main Bakara market, and more importantly a large increase in the supply of new Somali Shilling notes from note printing. In Mogadishu, the shilling lost value by 38%, from SoSh 14,160 in January to SoSh 19,500 per dollar in July. In Bosasso and Galkaayo markets (main reference markets for the norther and central regions), the shilling depreciated by 47% and 43%, respectively. Similar trends were also observed in all other markets in the South, particularly in Beletweyn (37%), Baidoa (28%) and Kismayo (22%).

Figure 5: Monthly Exchange Rates - SOSH and SLSh to USD



Source: FSAU/FEWSNET Market Update, July '07

In contrast, the Somaliland Shilling, however, remained stable during this same period, with a value of 6,300 SLSh per US dollar in the Hargeisa market (Figure 5). In some important markets like Burao, a prohibition of use of the new Somali Shilling notes by the Somaliland authority attracted protesters and demonstrations. In the northeast (Garowe and Bossaso) there were also public protests over the printing of the new notes and its inflationary impact.

As a result of the sharp devaluation of the Somali Shilling, there has been rapid inflation and an unusual increase in imported commodity prices over this same period. Prices of imported commodities such as sugar, rice, cooking oil and petrol have increased dramatically. Between January and July, the price of rice in north and central regions, particularly in Bosasso and Galkaayo, increased by 59% and 78%, respectively. In the south, the price of rice increased by 37%, 39%, and 66%, in the Juba, Shabelle and the Sorghum Belt regions, respectively. Fuel prices have also increased in most markets due to increased and high global fuel prices, disruptions in imports, and restrictions on inter-regional trade. Between January and July of this year, the price of petrol rose over 60% in Mogadishu and Shabelle regions, 30% in Juba region, while in central regions and the Sorghum Belt petrol prices rose by 29% and 24%, respectively (see FSAU/FEWSNET Market Data Update, August 2007). Taking seasonal price changes into account, the prevailing price increases are significant. The inflation and price increases have a direct impact on the food and livelihood security, especially for the urban poor and IDPs who are dependent on market purchases.

NUTRITION

An integrated analysis of the nutrition information¹ collected from March to July indicates a varying nutrition situation throughout the country (Map 6 and 7). Two significant shocks over the last six months, the Acute Water Diarrhoea (AWD) outbreak which affected most parts of the country and the recent displacement from Mogadishu, are the key factors in the current analysis. The AWD outbreak in south and central Somalia resulted in nearly 40,000 cases from January to June with an estimated 1,133 deaths, however, is finally indicating a drastic reduction in cases in July in the three most affected regions (Middle and Lower Juba, Banadir) with no new cases in the other regions. In the northwest a total of 3,864 cases were reported in the January to August timeframe with 46 related deaths.



Women collecting water for drinking from the road, Shabelles, May 2007, FSAU.

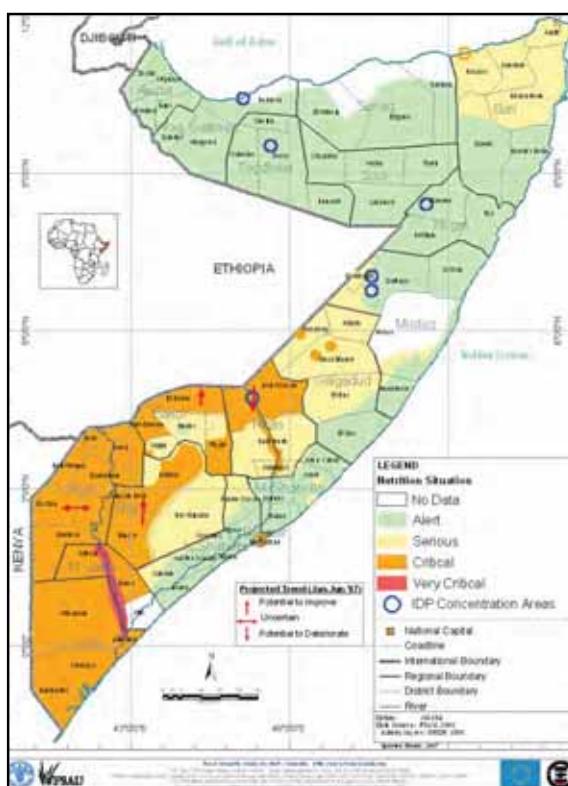
From this analysis, of most concern is the significant deterioration in the Shabelle region, which has resulted in rates of global acute malnutrition of 17%², which are above the emergency threshold levels of 15%, with very concerning rates of severe acute malnutrition above 4%. As outlined earlier, this is the result of cumulative shocks which have had a detrimental effect on the nutritional well being of the riverine and agropastoral populations. A recent rapid assessment using Mid-Upper Arm Circumference (MUAC) conducted by MSF Swiss has also indicated a very *Critical* nutrition situation amongst the newly displaced population near Afgoye town.

Two other areas indicating very *Critical* levels of malnutrition are the long term IDPs in Galkaayo and Bossaso, linked to poor health, water and sanitation quality and services. An earlier rapid MUAC assessment conducted by FSAU in Baidoa in March as a result of the new IDP influx, also indicated very *Critical* levels of acutely malnourished children (21%), though a repeat assessment in July indicated an improving trend (12%).

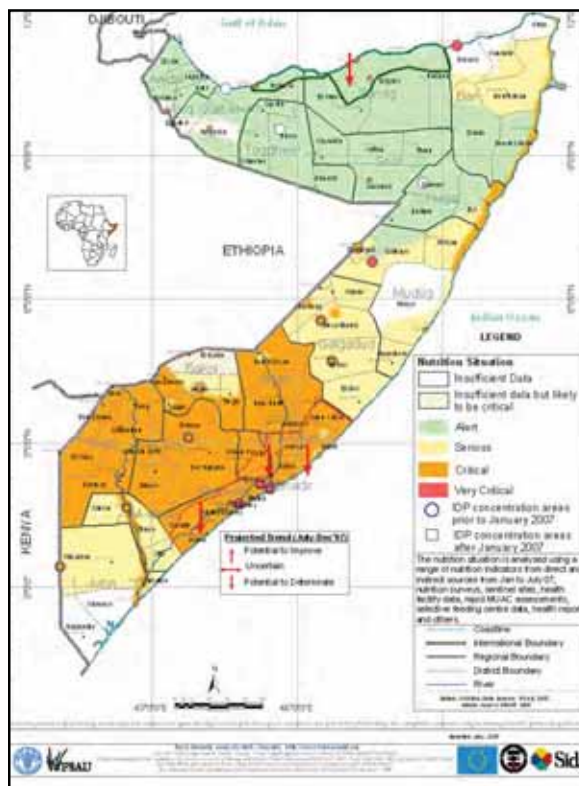
¹ The analysis was conducted on a range of nutrition information collected from March to July 2007 including: 20 nutrition surveys (18 by FSAU & partners, 2 by ACF), 132 sentinel sites, 110 Health facilities, rapid MUAC assessments conducted in 80 sites, data from partners selective feeding centres, WHO Acute Watery Diarrhoea updates and other secondary data.

² Shabelle Riverine population recorded a GAM rate of 17.0% (13.4 - 20.6) with 17.3% (13.3 - 21.3) recorded in the Shabelle Agropastoral populations.

Map 6: Nutrition Status January '07



Map 7: Nutrition Status July '07



Analysis of nutrition surveys conducted in Somalia (n=84) over the last six years has highlighted the strong association of diarrhoea with acute malnutrition, caused by poor quality drinking water, sanitation and care practices. This is illustrated by the chronically high levels of acute malnutrition over the last few years in many parts of south and central Somalia (Gedo, Bay, Bakool, and Hiran), in spite of improved availability and access of food.

The current nutrition situation again indicates a similar trend from the *Deyr* '06/07 in many regions, with a stable yet *Critical* nutrition situation. These regions include Bay, Bakool, Gedo and part of Hiran. The exceptions include, Burhakaba, Jalalaqsi and Buloburti district rural livelihoods, which have indicated deterioration from *Serious* in the *Deyr* '06/07 to *Critical* following the impact of newly displaced populations into the district and the AWD outbreak (Map 6 and 7).

Some positive changes in the nutrition situation have, however, been reported in Juba region with all three rural livelihoods experiencing some improvement from the *Deyr* '06/07. Results from the recent agropastoral and pastoral population nutrition assessments now indicate a *Serious* situation down from *Critical* and a *Critical* situation in the riverine populations, down from the *Very Critical* situation in January '07 (Map 6 and 7). These improvements are in line with the improved food security indicators and are also likely to have benefited from the enhanced humanitarian response in the region over the last six months.

For the northeast zone, the situation varies by livelihood, though there is no significant change from the *Deyr* '06/07 analysis. Along the Coastal Deeh livelihoods, however, deterioration to a *Critical* nutrition situation has been observed in June in line with expected seasonal trends given the lack of fishing at this time of year due to rough seas. Other areas remain at *Alert* levels and *Serious* levels with the exception of the long term IDPs, as mentioned earlier in Bossaso and Galkayo, where the nutrition situation is *Very Critical*.

Finally, for the northwest, in general the nutrition situation also remains stable at *Alert* levels, which are in line with the analysis from the *Deyr* '06/07. However, the eastern Golis livelihood, along the coast has slightly higher levels of acutely malnourished children, though still very low and therefore has been highlighted for close monitoring. A more detailed analysis of the nutrition situation is available in the Nutrition Update for July 2007.

REGIONAL HIGHLIGHTS

SOUTHERN REGION

The overall food security situation in the southern regions of Somalia is mixed; some areas have continued to improve since the *Deyr* '06/7, while others have deteriorated. It is currently estimated that 785,000 people in the south are in **Humanitarian Emergency** or **Acute Food and Livelihood Crisis**, and require urgent humanitarian and livelihood saving assistance. Of the 785,000 affected people, 490,000 people are in **Acute Food and Livelihood Crisis (AFLC)** and **295,000** people are in **Humanitarian Emergency (HE)**. This is a 33% increase from the total number in AFLC and HE from January – June 2007, which is primarily due to the sudden on-set **Humanitarian Emergency** in Lower and Middle Shabelle regions. Of the total 785,000 people in **AFLC** and **HE** in southern Somalia, more than half or 51% are in the Shabelle regions. Most or 85% of those in **HE** and 36% in **AFLC** are in the Lower and Middle Shabelle.

Shabelle Regions

The food security and nutrition situation in the two main livelihoods (riverine and agro-pastoral) of the Shabelle region have been resilient to seasonal shocks for more than a decade. However, this region is now currently struggling with a large scale **Humanitarian Emergency** and **Acute Food and Livelihood Crisis** due to the compounding impact of multiple shocks, including several seasons of below normal rains and poor cereal production, high and rapid inflation of food and non-food commodity prices, disrupted economic activities and trade, large and unstable influx of IDPs from Mogadishu, Acute Watery Diarrhoea (AWD) outbreak, rapid increases in levels of global acute malnutrition, and recurrent civil insecurity and conflicts.

Shabelle region, the 'bread basket' of Somalia, is experiencing the lowest level of cereal production this season in more than a decade (44% of PWA), primarily due to the very poor *Gu* '07 seasonal rains, poor irrigation infrastructure and river embankments damaged by the *Deyr* '06/07 floods. Market access is also constrained due to sharp and high inflation rates (40% to 60% increase in prices of both local cereal and imported commodities in the first half of 2007), which has resulted in a significant decrease in the terms of trade between labour and cereal. Other shocks include, the large influx of IDPs from Mogadishu and their impact on host communities, continuing conflict and civil insecurity that is leading to interruptions in economic activities and trade movement (including the closure and disruptions of trade through the Mogadishu seaport and main Bakara market), an outbreak of Acute Watery Diarrhoea (AWD) and worsening health conditions following the severe flooding in November and December '06, which resulted in contamination of drinking water sources and reduced access to health care services.

Of greatest concern is the sudden and significant deterioration in rates of global acute malnutrition in the riverine and agropastoral population in the Shabelle regions. Shabelle riverine population recorded a GAM rate of 17.0% (13.4 - 20.6) with 17.3% (13.3 - 21.3) recorded in the Shabelle Agropastoral populations, both of which are above the emergency threshold of 15%. Of even greater concern are the alarmingly high rates of severe acute malnutrition (SAM) which are above emergency thresholds of 4%. The rapid and significant deterioration in the nutrition situation of the rural population from the '*Alert*' nutrition situation level in *Deyr* '06/07, directly to a '*Critical*' nutritional situation level (skipping the level of '*Serious*') is of great concern (see Map 6 and 7).

Juba and Gedo Regions

In contrast, the food and livelihood security of Juba and Gedo regions show continuing and significant improvements from the droughts and floods in '05/06. This is due to a notable recovery of livestock herd sizes, sheep/goats and camel in particular, improved availability of milk and meat, high livestock prices, improved cereal production, high and improved terms of trade, and the availability of job opportunities in riverine areas, including fishing in *Desheks*.

The overall nutrition situation in the Middle and Lower Juba Regions since the *Deyr* '06/07 indicates an improvement from *Very Critical* to *Critical* levels in the riverine livelihood zone, while in the pastoral and agro-pastoral livelihoods, the situation has improved from *Critical* to *Serious* (Map 6 and 7). This is associated with the positive impact of the *Deyr* '06/07 and *Gu* '07 rains which have contributed to improved crop production and livestock recovery, thereby increasing access to milk and milk products. In addition, access to humanitarian support in the form of food assistance and health services in the riverine areas has also contributed to increased household food access and dietary diversity. The nutrition situation in Gedo Region has remained *Critical* since the *Deyr* 06/07. This is associated with limited access to livestock products, including milk and meat following partial livestock recovery in some areas (Dawa pastoral and Southern Agropastoral livelihoods), poor *Gu* '07 rains, and reported increase in seasonal morbidity trends. Currently, the overall number of people in need of assistance in Juba and Gedo regions is **255,000 people** in **Acute Food and Livelihood Crisis**, which is a decrease of 47% from the total number in AFLC and HE from January – June 2007. The only population identified in **Humanitarian Emergency** are 30,000 riverine and agropastoral people in Gedo region.

Bay and Bakool Regions

In Bay region, pastoral and agropastoral livelihoods have shown notable improvement from the *Gu* '06 and *Deyr* '06/07 due to good sorghum production (98% and 228% of PWA, respectively) and improving livestock conditions, with some calving and kidding/lambing up until *Gu* '07. Although Bay region has experienced a complete sorghum crop failure this *Gu* season (only 8% of PWA), most households still have sufficient cereal stocks for own consumption and sale for the next few months. Southeast pastoralists in Bay region are continuing to benefit from increasing herd sizes, although they have not fully recovered to their pre-drought cattle herds size levels. In contrast, in Bakool region this season's crop failure (5% of PWA), combined with previous seasons of low production in some areas, and declining rangeland and livestock conditions are leading to a deterioration in the food and livelihood security situation for poor agropastoral households.

The overall nutrition situation in most parts of Bay and Bakool regions remains *Critical* indicating a persistence of similar situation as recorded in *Deyr* '06/07 and deterioration in some areas. The prevailing *Critical* nutrition situation in the entire region is attributed to the outbreak of AWD and other seasonal illnesses, poor childcare practices, poor water and sanitation, and limited health and nutrition services in some areas. In Bakool, it is estimated that **80,000** people are in **Acute Food and Livelihood Crisis** (70,000 agro-pastorals and 10,000 pastorals) between July and December 2007. In Bay region, improvement is indicated by the reduction of the number of Southeast Cattle Pastoralists in **Acute Food and Livelihood Crisis** to 5,000.

CENTRAL

Hiran

In Hiran region, the humanitarian situation of agro-pastoral and riverine livelihoods has continued to deteriorate since January 2007. Agro-pastoralists, previously classified as **Chronically Food Insecure** in the *Deyr* '06/07 are now in **Acute Food and Livelihood Crisis (AFLC)**, with 50% of the poor (25,000 people) affected. This decline is due to the complete *Gu* '07 rainfed crop failure and declining purchasing power due to increasing cereal prices. The situation in the riverine areas of Hiran region has deteriorated significantly since last *Deyr* '06/07 and while the phase classification remains the same, **Humanitarian Emergency (HE)**, there is an increased number of people in this phase. Those in **Humanitarian Emergency (HE)** now include 100% of the poor and 25% of the middle wealth group riverine population, representing 15,000 people. Another 5,000 people are in **Acute Food and Livelihood Crisis (AFLC)**, representing 25% of the middle wealth group riverine population.

This deterioration is a result of the compounding effect of five successive seasons of poor crop production or crop failure due to droughts and floods. Production levels of the last five seasons compared to the post-war average (PWA 1995-2006) are 3% of PWA in *Gu* '05, 17% of PWA in *Deyr* '05/06, 33% of PWA in *Gu* '06, 81% of PWA *Deyr* '06/07 and 46% of PWA *Gu* '07. Maize prices increased by 47% from January to July '07 (from 2,900 SoSh/kg to 4,250 SoSh/kg), while sorghum price increased by 15% from January to July '07 (from 2,600 SoSh/kg to 3,000 SoSh/kg). The purchasing power of the poor, as measured by the terms of trade (TOT) of labor to cereal, has declined by 17% in July '07 compared to January '07, and there are limited opportunities for labor. Similarly, the purchasing power for agropastoralists (TOT of cereal to goat) declined by 12%, but is still favorable for wealthier groups (middle and better-off). The nutrition situation remains *Critical* (15-19.9%) for the population in Hiran region with the exception of Belet Weyne town which was *Serious* (10-14.9%). A deterioration in the situation among agropastoral and pastoral population in Jalalaqsi and Buloburti Districts from *Serious* situation in the *Deyr* '06/07 to the current *Critical* situation was noted.

Central Regions

In Adado, Dhusamareeb and El-bur districts most of the berkads and water catchments are already dry and water trucking has started two months earlier than normal, with associated increased prices due to the below normal *Gu* '07 rains (20-40% of the long term mean). Pasture is also deteriorating in some areas. Declining rangeland resources increases the risk to resource based conflicts, which have already begun in areas during August. Generally livestock body conditions, however, are good to average due to the positive effects of the last *Gu* '06 and *Deyr* '06/07 rains. Livestock body conditions, however, are expected to begin to deteriorate during the dry *Hagaa* season.

Livestock reproduction is high in sheep/goats due to high conception rates during the *Deyr* '06/07, however, camels is low as a result of the poor conception in the last *Gu* '06. High calving rate of camels is expected in the *Deyr* '07/08. Herds have recovered and grown, throughout the central region, at an increase of 5-10% in camels and 10% in sheep/goats since the last *Deyr* season. Livestock prices have increased slightly, but the terms of trade (TOT) of goat/cereal declined due to the sharp increase of rice prices. Rice, sugar and petrol prices have increased 45%, 14% and 30%, respectively during this time, due to the depreciation of the Somali Shilling to US dollar. In the Galkacyo market, the terms of trade (TOT) of local quality goat to rice is 38% lower in July '07 (38.47kg/head) as compared to July '06 (62.23 kg/head). Similarly, in Dhusamareeb market, the TOT of local goat to rice decreased by 35% and in Abudwak market it declined by 15% over the same time period (July '07 compared to July '06).

Despite the increased rice prices, lower terms of trade and early and high costs associated with water trucking, both pastoral and agro-pastoral households have access to adequate food, due to the recovery in their livestock herd size and growth over the year (April '06-March '07). Expenditure analysis indicates that households have sufficient animals to sell to cover the cost of the increased price of food, as well as to cover the cost of water trucking over the next few months.

Crop failure is noted in the Cowpea Belt of Xaradheere, Ceelbuur and Ceeldheer districts, due to moisture stress that resulted from below normal *Gu* '07 rains. Currently, there are no stocks available of local cereal production. The nutrition situation, however, is generally showing an improving trend in Addun and Hawd livelihood zones, while in the Coastal Deeh Cowpea Belt area is indicating increased trends in malnutrition. Concerns are, however, the Acute Water Diarrhea (AWD) effects, increased displacement, and insecurity tensions affecting access to water and grazing and markets. The early warning level of **Watch** in last *Deyr* 06/07 has changed to **Moderate Risk** for the entire central region during the period of July to December '07. Indicators to monitor during this time are food prices (staple/non staple) and associated terms of trade, water trucking prices, the effects of the IDPs on host rural communities, and increased risk to resource based conflicts (around access to water and pasture).

NORTHERN REGIONS

All pastoral and agropastoral areas in the northern regions remain in the usual phase of **Chronically Food Insecure (CFI)**. However, pastoralists of the Addun and Coastal Deeh in Eyl, Jariban, and Galkayo districts are identified with an early warning level of **Moderate Risk** to deterioration due to the combined effects of the poor *Gu* '07 rainfall (Gu '07 rainfall or RFE is 20-60% of the long term mean), poor rangeland conditions (water and pasture), and declining terms of trade (livestock and rice).

Most of the berkads and shallow wells in the Addun and Coastal Deeh pastoral livelihood zones are dry and pasture and grazing conditions have deteriorated to poor. Only the better-off and upper-middle wealth group households can afford the high cost of water purchase and the high transportation costs to migrate to Hawd of Goldogob and Burtinle districts. The poor and lower middle wealth group households are unable to move, thus face a deteriorating situation. Although the nutrition status for most of the rural population in the northern regions has not changed from the *Deyr* '06/07 results of *Alert*, an increase in the level of malnutrition is observed in Coastal Deeh livelihoods. A nutrition assessment conducted in May 2007 indicates a Global Acute Malnutrition rate of 14.9%, (*Serious*) which is worse when compared to previous results in Coastal Deeh of <10%. A rapid assessment conducted in Addun using MUAC during *Gu* '07 has also indicated deterioration from *Alert* to *Serious*.

Livestock body conditions for all species are average to good throughout the northeast and northwest. Goat milk production, for the first time, maintained normal levels. Camel milk availability is currently low, but this is expected to improve as camels will begin to calve in the coming *Deyr* '07/08. Camel and sheep/goat herd sizes have completely recovered and increased to high levels (150-200% and 140-180%) as compared to baseline herd sizes. No livestock disease outbreak has been reported, however, common diseases such as CCPP, Lumpy Skin Disease and tick borne disease are affecting sheep/goats and camels. Most of the pastoralists have normal access to sellable animals to barter against the recent cereal price increases and in some areas the pastoralists have repaid most of their former cumulative debts. Localized areas in Sool, Nugal (Ainabo district) and parts of Sanaag regions received poor *Gu* '07 rainfall, but all wealth groups can easily migrate to Nugal Valley where both pasture and water is abundant.

In the northwest agropastoral areas, *Gu/Karan* '07 cereal crop establishment production is estimated at 25,000 MT, which is 101% of *Gu/Karan* '06 and 141% higher than *Gu/Karan* PWA. The consecutive seasons of above normal *Gu/Karan* production has improved food security by increasing cereal availability and accessibility, as well as providing a source of cash income for agropastoralists.

Livestock exports improved through Berbera port, while exports from Bossasso port declined significantly due to the monsoon restricting the loading of small vessels. Berbera port is not affected by the monsoon tides. The agreement reached between the Puntland authorities and the Saudi livestock trader was not accepted by the local livestock traders and as a result traders withheld livestock. Overall, livestock prices are improving. Goat export quality prices in northwest and northeast in July '07 are higher by 17% and 28% compared to July '06 and 43% and 29% compared to the five year average of July prices (2002-06), but declined by 14% and 2% compared to Dec '06 (the peak demand for Hajj), respectively. Over the same time period, rice prices in the northwest in July '07 were higher by 6% compared to July '06, 17% compared to the five year average of July prices (2002-06) and 8% compared to December '06. In the northeast, rice prices are higher by 70% compared to July '06, 59% compared to the five year average of July prices (2002-06) and 53% compared to December 06. The sharp increase in rice prices in the northeast is due to the sharp devaluation in the Somali Shilling caused by the increased money supply following newly printed Somali shilling bank notes in the markets.

Burao slaughter house resumed exporting carcass meat to the Arabian Gulf in March 2007, after halting operations following the informal livestock ban in January '07 implemented due to the confirmation of RVF in northeastern Kenya. From January to July 2007 30,540 heads of carcass were exported from Burao abattoir, which is a 18% decrease compared to same period last year (37,094 carcass). The nutrition status of the Galkayo IDPs is *Critical* where a nutrition assessment conducted in May 2007 showed global acute malnutrition (GAM) rates of 21.9%, well above previous rates of less than 10% and likely linked to increasing morbidity levels and reduced access to health services.

Recent and forthcoming publications and releases

FSAU Press Release, August 13, 2007
 FSAU/FEWSNET Market Data Update, August 2007
 FSAU/FEWSNET Climate Data Update, August 2007
 FSAU Nutrition Update, July, 2007
 FSAU Technical Series Post Deyr '06/07 Analysis, February 2007
 FSAU Technical Series Post Gu '07 Analysis, September, 2007 (forthcoming)

NOTE: The above publications and releases are available on the FSAU website: www.fsausomali.org

