

Climate

Markets

Nutrition

Agriculture

Livestock

**Civil
Insecurity**

**Emerging
Regional
Issues**

This special FSAU brief provides a summary of the key findings of the post *Deyr* '07/08 Assessment and Analysis, which are the results of fieldwork (December 17-31), regional and national analysis workshops (January 1 - 19) and a Technical Verification and Partner Vetting Meeting (January 28). FEWS NET Somalia along with 45 partners, including regional authorities, UN and international agencies, and local and international NGOs, participated and supported in this post *Deyr* assessment and analysis process.

FSAU issued a press release and presented these results in Nairobi at a Somalia Support Secretariat Special Meeting on January 31. Somalia regional presentations are planned for Garowe (February 10), Dolo (February 7), Hargeisa (February 10), Baidoa (February 10), Belet Weyn (tba) and Buale (February 11). The press release and presentation, in addition to the Phase Classification Map, estimated population numbers by region, district and livelihood zone, are available on the FSAU website.

KEY FINDINGS

Based on the post *Deyr* '07/08 seasonal assessment, the Food Security Analysis Unit for Somalia (FAO/FSAU) and FEWS NET post *Deyr* '07/08 confirm that the number of **people in need of humanitarian assistance and livelihood support for at least the next six months have increased** from 1.5 million in last June to **about 2 million, including roughly 1 million IDPs** (Table 1). The current crisis confirms

FSAU/FEWSNET early warnings issued in December (FSAU FSNB, Dec. 21, 2007) of a deteriorating food security and nutrition situation following two consecutive seasons of poor rainfall that has led to crop failures, poor pasture, and browse conditions, and water shortages. The findings of the analysis, however, does not take in to account a sizable number of urban poor who are also equally affected by the prevailing shocks, including the record high food prices, ongoing conflict, disruptions in trade and economic activities, and hyper-inflation of essential commodities.

The humanitarian situation has deteriorated over the last six months in the Shabelle, Hiran and Central regions due to a significant increase in the number of Internally Displaced Persons (IDPs) fleeing Mogadishu and a deepening drought in Hiran and Central regions. However, the food security and nutrition situation has improved for the rural populations of southern regions of Juba and Gedo, regions previously devastated by the regional drought in 2005/06.

The three key defining elements of the current crisis:

- **Humanitarian Crisis in the Shabelle Regions:** The Shabelle regions remain the worst affected in the current humanitarian crisis. Most, or 74%, of those identified in *Humanitarian Emergency* and 22% identified in *Acute Food and Livelihood Crisis* are in Lower and Middle Shabelle regions. These regions are also hosting the largest concentration of new IDPs from Mogadishu **totaling more than 367,000 people**. Although there will be a temporary relief for some communities due to good rainfed cereal crop production, overall the total *Deyr* '07/08 season cereal production of the two regions is significantly below normal with a third consecutive season of poor maize production (39% of Post War Average). The nutrition situation is also still critical with rates of global acute malnutrition above emergency thresholds. Continuing insecurity and inflation over the next few months can only lead to further deteriorations in the crisis.
- **Swelling number of IDPs.** One year ago the number of protracted Internally Displaced Persons (IDPs) was estimated at 400,000 people, but today are more than 1 million people. The situation of the new IDPs continues to deteriorate, as the number of people fleeing Mogadishu **has more than doubled from 325,000 in August 2007, to more than 700,000** in the last six months. In addition to insecurity, the displaced populations have limited social support from host communities, limited options to earn income, and face record high food and non-food prices. Over 80 percent of the newly displaced people have concentrated in Lower and Middle Shabelle, Hiran and Central regions that already face problems of food access, collapsing livelihoods, and emergency nutrition levels. Recent nutrition surveys, also confirm that the nutrition situation of the protracted *Internally Displaced Persons* (IDPs), who have been displaced for years, is at or greater than internationally acceptable emergency thresholds and require urgent assistance.

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- **Deepening Drought in Hiran and Central Regions:** An estimated **135,000 pastoralists** and **90,000 agriculturalists and agro-pastoralists in Hiran and Central regions** face a rapidly deteriorating situation and are in need of urgent humanitarian assistance or livelihood support. Due to insecurity, pastoralists in Galgaduud and south Mudug have limited options for migration and are continuing to purchase expensive trucked water (over 200% of normal) for their livestock since June last year. Given most of the underground water reservoirs are dry, water trucking is expected to continue till the onset of the *Gu* rains in mid-April. If these rains fail, this region will be facing a full scale drought, the worst seen in recent history. Furthermore, food access is severely constrained due to record high cereal and other essential commodity prices, which are expected to continue to increase over the next six months. In addition, as livestock prices continue to decline with deteriorating livestock body conditions and productivity, the purchasing power of pastoralists will continue to fall. The coping capacity of pastoral households, are also overstretched, as these areas are also hosting the second highest concentrations of new IDPs from Mogadishu (32% of the total or 224,000 people).

Implications for Action:

➤ **Urgent Need For Integrated Humanitarian and Livelihood Response in the Shabelle Regions**

Given the magnitude of the humanitarian crisis in Mogadishu and Lower and Middle Shabelle, coupled with the crisis among the rural population and new IDPs, there is a need for urgent multi-sectoral interventions focused on **immediate needs**, including food, clean water, health services, and sanitation. Equally important are activities to **support livelihoods and protect assets**, including works programs to rehabilitate irrigation infrastructure before the next *Gu* rains in mid-April. Moreover, there is a need for increased advocacy to stop conflict, civil insecurity and political instability. Increased advocacy is needed to allow greater humanitarian access, encourage the resumption of economic activities, halt the further population displacement, and prevent a further slide into an even greater humanitarian crisis of increased magnitude and scale.

➤ **Urgent Livelihood Support to Drought Affected Communities in Hiran and Central Regions**

Immediate actions are needed to protect against the complete **loss of livelihood assets, including livestock holdings**, to ensure future recovery. Interventions are also needed to support livelihoods to either halt the stripping of, or help the recovery of livelihood assets, e.g. strategic sector interventions such as the repair or maintenance of boreholes and berkads, improved access to health services, clean water, increase access to credit or debt repayment.

➤ **Other Regions Requiring Humanitarian Assistance - Gedo, Lower and Middle Juba, Bay and Bakool Regions)**

For populations facing conditions of **Humanitarian Emergency (HE)** in Gedo, Lower Juba, and Bakool regions, urgent complementary interventions are needed focusing on immediate needs. These regions also have populations in **Acute Food and Livelihood Crisis (AFLC)**, along with Middle Juba and Bay, which require immediate interventions to support livelihoods to either halt the stripping of, or help the recovery of livelihood assets.

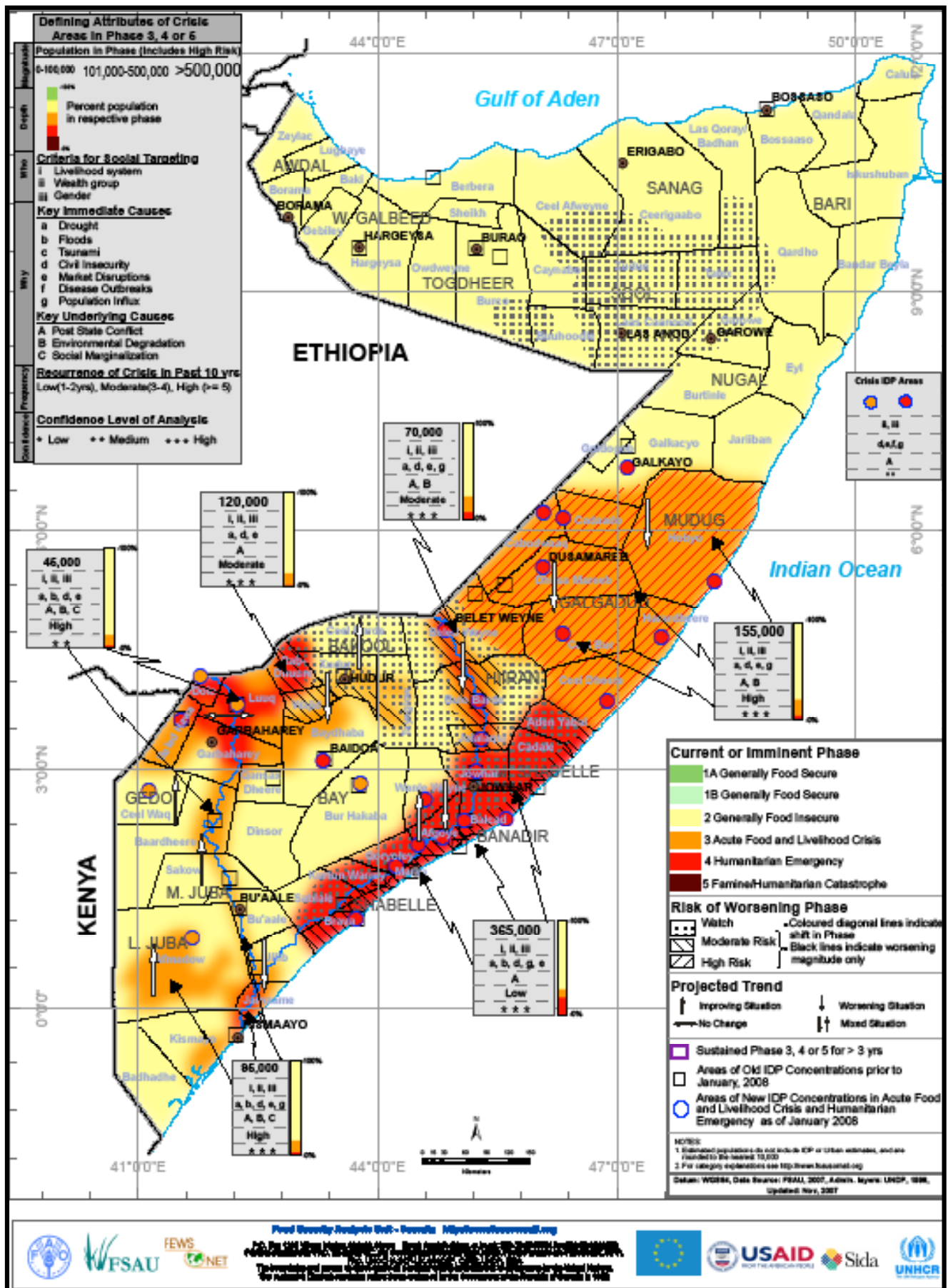
➤ **The rest of the Country Are Generally Food Insecure**

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. Interventions are also needed to readdress structural hindrances to achieving adequate food, nutrition and livelihood security, and address the underlying causes of chronically high malnutrition levels, e.g. dietary diversity, access to health care clean water, and improve caring practices.

Table 1: Somalia Food Security Situation Analysis: Post Deyr '07/08 Population Numbers, Jan. - June 2008

Affected Regions	UNDP 2005 Total Population ¹	Assessed and Contingency Population in AFLC and HE		
		Acute Food and Livelihood Crisis (AFLC)	Humanitarian Emergency (HE)	Total in AFLC or HE as % of Region population
North	2,341,718	0	0	0
Central				
Galgaduud	330,057	80,000	15,000	29
Mudug	350,099	35,000	5,000	11
Sub-Total (Central)	680,156	115,000	20,000	20
South				
Bakool	310,627	90,000	5,000	31
Bay	620,562	25,000	0	4
Gedo	328,378	35,000	10,000	14
Hiraan	329,811	65,000	25,000	27
Juba Dhexe (Middle)	238,877	20,000	0	8
Juba Hoose (Lower)	385,790	60,000	15,000	19
Shabelle Dhexe (Middle)	514,901	40,000	85,000	24
Shabelle Hoose (Lower)	850,651	85,000	155,000	28
Sub-Total (South)	3,579,597	420,000	295,000	20
Banadir	901,183			
GRAND TOTAL	7,502,654	535,000	315,000	11
Assessed Rural population in AFLC or HE		850,000	11	
Estimated number of new IDPs updated Jan 08		705,000	9	
Estimated number of old IDPs		275,000	4	
Estimated total population in crisis		1,830,000	24	

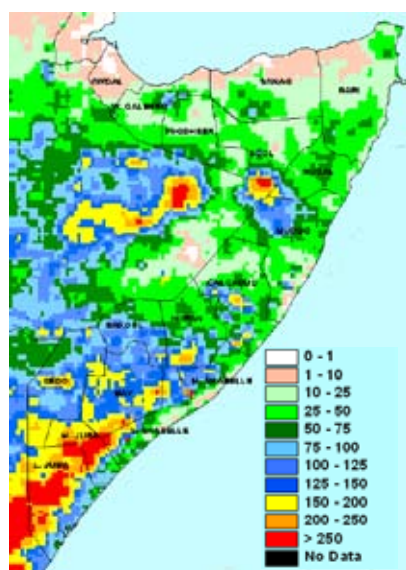
Map 1. Integrated Food Security Phase Classification, Post Deyr '07/08 Projections, January through June 2008



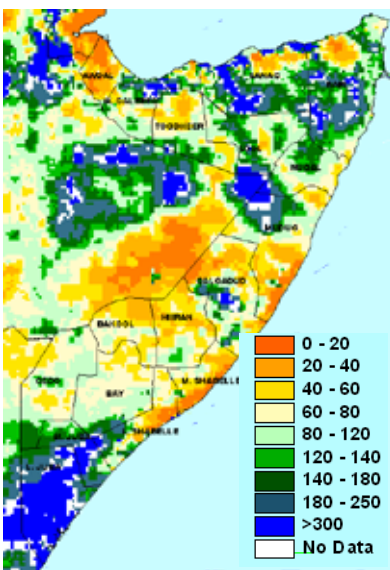
post deyr '07/08 integrated phase classification map

SECTOR HIGHLIGHTS

Map 2: Cumulative RFE for Deyr season (Oct. to Dec. '07)



Map 3: RFE percent of normal for Deyr '07 (Oct. to Dec.)



Map 4: NDVI anomaly December 3rd dekad 2007



CLIMATE

In most regions in the south, the *Deyr* '07/08 rains started on time. Gedo, Juba and parts of Shabelle regions, for example, received good rains during the second dekad of October indicating a timely onset of the rainy season. However, the overall rainfall performance in terms of the intensity, coverage and distribution over time and space is mixed (Map 2 and 3). In the south, good to above normal rains were received in inland parts of the Juba regions as well as southern Gedo, and Bay. However, key agricultural areas in Lower Juba, eastern Shabelle regions, Hiran and southern Bakool received below normal rains. Pockets of the northeast and northwest also received below normal rains.

Of particular concern are livestock dependant areas in Hiran and Central regions (parts of Galdagud and Mudug) where *Deyr* rains were below normal for the second consecutive season both in amount as well as geographic and temporal distribution. With the exception of a few areas in Galgaduud, most of the central rangelands, received only 0 to 50mm between October and December. Rains were also poor in the neighboring Somalia region of Ethiopia, thereby limiting pastoralist options for cross-border migration. Compared to the long term mean, most of these areas received less than 60 percent of the normal rains (Map 2).

Rains were insufficient to replenish water sources, regenerate pasture, and for rainfed crop development. The localized nature of rainfall has also resulted in abnormal livestock migration, which is adding pressure to limited rangeland and water resources. Water availability is currently problematic and most of the underground water reservoirs (*berkeds*) are empty. There will be continued stress on rangeland resources during the *Jilaal* dry season (Jan. – Mar.) with the next rains not expected until mid April.

Other areas where *Deyr* rains also performed poorly include pockets of pastoral areas of Hawd of Togdher, Sool plateau, Nugaal Valley, and Addun livelihood zones, as well as the northern parts of Bakool region and parts of Bay. While satellite imagery show good rains in Jamamme and Kismayo, ground truthing indicates that rains were below normal and not sufficient for crop development. Coastal areas of the Shabelle regions received below normal rains leading to poor rangeland condition and poor crop production in these areas (see crop and livestock sections). Data from the rain gauge network in these regions also shows that the performance of the rainy season is mixed.

The normalized difference vegetation index (NDVI) obtained through satellite imagery compared to a long term mean, indicates significant variation in current vegetation levels for this time of year across Somalia, reflecting the mixed seasonal (Map 4). The exceptions are most of central regions and coastal areas of the Shabelle regions, northern Gedo and Bakool, and parts of Lower Juba where the NDVI indicator is low due to poor *Deyr* rainfall. Field reports support and confirm the satellite imagery data.

CIVIL INSECURITY

Over the last two months, insecurity, conflict, and tensions have continued, and in some areas increased in the south and central regions. In particular, field reports indicate that there are numerous road blocks, incidents of banditry, along with heightened political tension, especially in the Lower and Middle Shabelle, Hiran and Central regions. Transportation and movement between and within the most affected regions continues to be costly, difficult, and dangerous, and is leading to further increases in traded food and non-food commodity prices.

Unofficial roadblocks are making movement more difficult, dangerous, and costly for both local populations, and agencies attempting to respond with assistance. Humanitarian access and the provision of humanitarian assistance to populations most in need, continues to be difficult and problematic.

Mogadishu remains violent, extremely tense, and volatile. Reports indicate that inhabitants who remain in the city are now living in a state of terror and are under constant threats of harassment. Many districts within the city are deserted leaving assets, (household and business) open for looting and destruction.

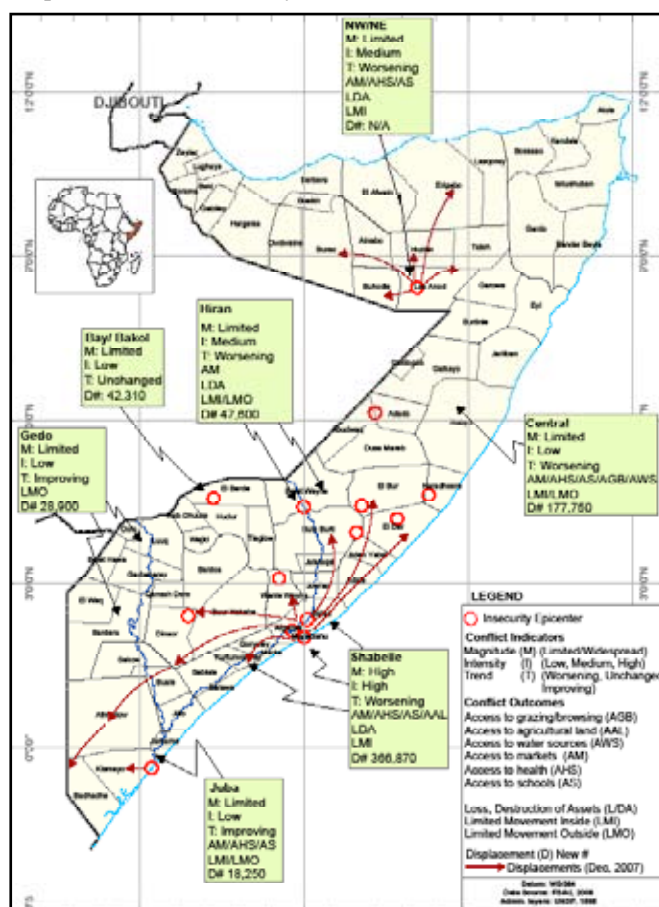
The ongoing and increasing civil insecurity and tension will continue to limit trade and economic activities, as well as restrict port and market movements in and out of the city, thus ensuring continued high prices of basic commodities and reduced income earning opportunities. Conflict has led to the loss of lives and injuries in Mogadishu, but also considerable displacement within and from the capital, and significant asset loss through looting and shelling destruction.

In Kismayo, an International NGO vehicle was struck and destroyed by a Remote Controlled Improvised Explosive Device (RCIED), believed to be a remote controlled mine. International and Somali nationals were killed in the blast. This type of attack and targeting of humanitarian aid workers will further hamper the ability of humanitarian agencies to operate, and adds uncertainty to an already stressful and insecure operating environment.

The security situation remains tense and insecure in other areas of southern Somalia, with insecurity incidents reported in Wanle Weyen (Lower Shabelle), Belet Weyne (Hiran), Kismayo (Lower Juba), Jowhar (Middle Shabelle), Cel-berde (Bakool), Adado (Galgadud) and Baidoa (Bay)). Tensions are also increasing in Hiran and Central regions. Lack of adequate rainfall in many parts of the Central regions and increased competition for available pasture, and more specifically water, will continue to fuel increasing tensions until the next rains in April. This will further increase the risk of resource based conflicts and limit mobility within the area, both for vehicles and livestock. In Sool region, it is reported that approximately 60-70% of the inhabitants of Las Anod town (UNDP 2005: population 24,000) fled in mid-September following political unrest, which reportedly killed 30-40 persons. Most of the displacement is to nearby settlements and villages, where they have joined relatives and friends.

The main regions at risk to continuing or increased insecurity over the next six months are Bay, parts of Bakool, Middle and Lower Shabelle, Hiran, Galgadud, and South Mudug. The anticipated indirect impacts of continuing or increased insecurity include disruption of trade (local cereals and other commodities) within the country and across regional borders (for example Ethiopia-Somalia), continuing market price inflation, restriction of livestock migration in Central and Hiran regions, continuation of localized short-term displacement, and further restrictions of humanitarian space. Continuing insecurity in Kenya, is also affecting IDP population movements across the border (Map 5).

Map 5: Somalia - Insecurity Outcomes Nov '07 - Jan, '08



Source: FSAU Post Deyr '07/08 Assessment

NEW INTERNALLY DISPLACED POPULATIONS

In the last six months, the number of people fleeing Mogadishu has more than doubled, from 325,000 in August '07 to **more than 700,000, an increase of 116%**. Most, or 82%, of these newly displaced people are heavily concentrated in the same regions that already face the worst problems in the country in terms food access, collapsing livelihoods, and emergency nutrition levels, including Lower and Middle Shabelle, Hiran, and Central regions which are in **AFLC** or **HE**. In addition to limited social support from host communities, displaced populations have limited options to earn income and face record high food and non-food prices.

The recent displacements are contributing to further deteriorations in the humanitarian situation in many areas. The impacts will be felt particularly in areas of the highest IDP concentrations, such as in the Shabelle regions, which are hosting 52% of all new IDPs, and Hiran and the Central regions, which are hosting 32%. Most of the new IDPs, or 84%, are concentrated in regions where the host communities are already severely stressed and face conditions of **Acute Food and Livelihood Crisis** or **Humanitarian Emergency**. People fleeing the fighting in Mogadishu are leaving behind their livelihoods and livelihood assets. The presence of IDPs is increasing pressure on host communities, placing additional burdens on water and health infrastructure, increasing the demand for rental properties, and increasing competition for available employment opportunities.

In addition to both IDPs and many host communities must also cope with record high food and non-food prices. Commercial import food prices, such as rice, wheat flour, sugar, and vegetable oil, have increased significantly and are at record high levels. Rice is 171% higher than the 5-year average in the Central regions, and vegetable oil is 111% higher than the 5-year average in Hiran. Rice in the Shabelle regions is 82% higher than the 5-year average. Similarly, Shabelle region maize is currently 145% higher compared to Jan. '07 and 92% higher compared to the 5-year average ('03-07). In the Sorghum Belt, sorghum is 112% higher compared to Jan. '07 and 92% higher compared to the 5-year Dec. average ('03-07).

The purchasing power of IDPs and some host communities is not only negatively impacted by record high prices, but through decreased income earning capacity as result of disruptions and a downturn in economic activities, such as employment and trade. Reduction of income earning capacity, increased competition of employment in host urban communities, and high rates of unemployment are reported. According to the FSAU/UNHCR impact assessment, 70-90% of new IDPs are unemployed, and more than 80% of the IDPs are not receiving remittances.

It is important to highlight that an estimated **275,000 protracted Internally Displaced Persons (IDPs)**, who have been internally displaced for years, also require urgent humanitarian assistance. These long-term protracted IDPs also face record high food and non-food prices, limited income earning options, and nutrition surveys confirm their nutrition situation is at or greater than internationally acceptable emergency thresholds.

Table 2: Newly Displaced Population from Mogadishu, March '07-Jan '08

Region	Estimated population (UNDP 2005)	Estimated # of IDPs to-date	% of total (estimated) IDPs by region	% of Regional Total Population	% of Regional urban Population
Awdal	305,455	30	0	0.0	0.0
W/Galbeed	700,345	11,120	2	1.6	2.3
Togdheer	402,295	710	0	0.2	0.6
Sanaag	270,367	760	0	0.3	1.4
Sool	150,277	4,400	1	2.9	11.2
Bari	367,638	4,500	1	1.2	2.5
Mudug	350,099	56,050	8	16.0	59.4
Galgaduud	330,057	121,700	17	36.9	206.4
Hiraan	329,811	47,600	7	14.4	68.9
Bakool	310,627	2,160	0	0.7	3.5
Bay	620,562	40,150	6	6.5	31.7
Mid.Shabelle	514,901	58,930	8	11.4	61.5
Banadir	901,183	68,000	10	7.5	7.5
L.Shabelle	850,651	239,940	34	28.2	138.9
Gedo	328,378	28,900	4	8.8	35.5
Mid & Lower Juba	624,667	18,250	3	2.9	10.2
TOTAL	7,357,313	703,200	100.00	9.6	

AGRICULTURE

Table 3: Deyr '07/08 Cereal Crop Production Estimates - Southern Somalia

Deyr Cereal Production Estimates in Southern Somalia						
Regions	Deyr '07/08 Production in MT			Deyr '07/08 as % of Deyr '06/07	Deyr '07/08 as % of Deyr PWA(1995-2006)	Deyr '07/08 as % of 5-year average (2002-2006)
	Sorghum	Maize	Total Cereal			
Bakool	2,580	290	2,870	52%	165%	114%
Bay	36,770	2,750	39,520	63%	129%	105%
Gedo	11,430	3,590	15,020	555%	291%	207%
Hiraan	1,700	690	2,390	36%	34%	33%
Juba Hoose (Lower)	0	560	560	64%	35%	69%
Juba Dhexe (Middle)	5,880	1,420	7,300	149%	181%	200%
Shabelle Hoose (Lower)	10,840	7,870	18,710	90%	51%	50%
Shabelle Dhexe (Middle)	3,320	4,790	8,110	124%	66%	60%
Deyr 2007 Total	72,520	21,960	94,480	85%	96%	86%

Source: FSAU Post Deyr '07/08 Crop Survey

Cereal Production

The Deyr '07/08 cereal production in southern Somalia is estimated at 94,480 MT, of which 77% is sorghum (72,508MT) and 23% maize (21,960MT). This is 86%, 96% and 85% of the 5-year Deyr average ('02-06), Deyr PWA ('95-06) and Deyr '06/07, respectively (Table 3 and Fig. 1). While the overall cereal production is only 14% below the 5-year average, there is considerable variation between regions. For example, Deyr '07/08 cereal production in Hiran region is 33% and in Gedo and Middle Juba regions is over 200% compared to the 5-year average. More than 40% of cereal production is from Bay region (due to the average and above average rainfall), followed by 20% from Lower Shabelle region, and 16% from Gedo region. Deyr cereal production from the Shabelle regions normally contributes 50% of the Southern Somalia production, however, this year's production accounts for only 27% of the Post War Average. The poor performance from the Shabelle regions is due to a combination of poor irrigation infrastructure, costly farm inputs, limited tractor availability, insecurity, and the poor performance of rainfall.

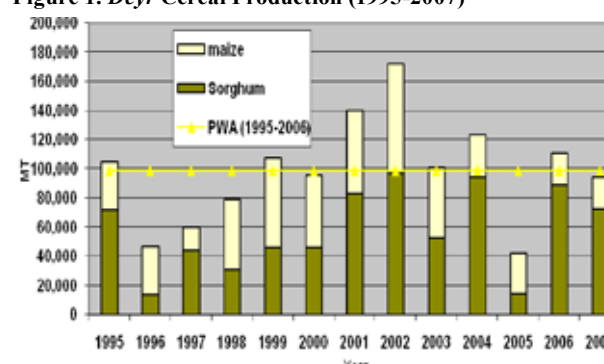
Regions with the lowest cereal crop production are Hiran, Lower Juba and Lower Shabelle regions. In contrast, due to the favourable rains, cereal production in Bakool, Bay, Gedo, and Middle Juba regions, is 65%, 29%, 191% and 81% higher than the PWA ('95-06). However, even within these regions there are areas of poor production. The exceptions are in northern Gedo region, and in Rabdure, Elberde and northern part of Wajid districts of Bakool region, where rains were insufficient for sorghum growth and development.

Accordingly, 51% of sorghum in Deyr '07/08 was produced in Bay region and 16% in Gedo, while the Lower Shabelle contributed 15% of the overall sorghum production. Gedo, Middle Juba and Middle Shabelle regions, cereal production was higher than the last Deyr '06/07, representing 555%, 149% and 124% of Deyr '06/07, respectively. In the northwest agro-pastoral regions of Awdal, Galbeed and Togdher, cereal production in Gu/Karan '07 crop production is significantly higher than average due to the above normal and evenly distributed rains. Cereal production from the Gu/Karan '07 season is estimated at 26,745MT, of which 85% is sorghum (22,723MT) and 15% maize (4,022MT). This is the second highest cereal production since 1998, representing 149% of PWA ('98 – 06).

Cereal Availability

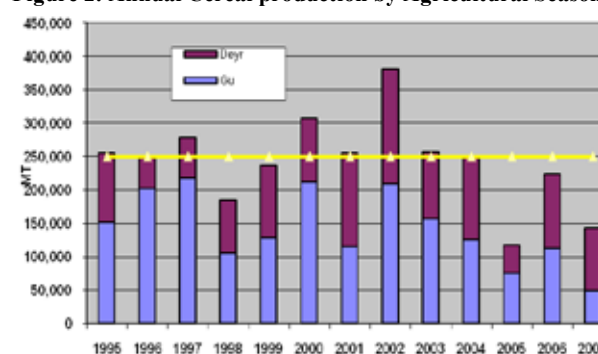
Although the cereal production in the Deyr '07/08 in southern Somalia is near normal and the Gu/Karan '07 in the northwest is significantly above normal, the overall annual cereal production for the country (Gu '07 and Deyr '07/08 combined) is 57% of PWA and is the second lowest cereal production in more than a decade (Figure 2). This is due to the extremely poor cereal production in the main production season (Gu '07 is 31% of PWA). Locally produced cereal availability is extremely low, as this is not only the third consecutive year of below normal annual cereal, but two of the three consecutive years are the lowest levels in more than a decade.

Figure 1: Deyr Cereal Production (1995-2007)



Source: FSAU Post Deyr '07/08 Crop Survey

Figure 2: Annual Cereal production by Agricultural Season



Source: FSAU/FEWSNET Historical Crop Data Update, Dec '07.

The FSAU Deyr '07/08 cereal availability analysis reveals that many better-off and middle wealth groups in Bay, Gedo, Shabelle, and Middle Juba regions have some cereal stocks, from the Deyr '06/07, Gu '07 and/or the current seasonal production. This could last up to five to seven months. In the Shabelle regions, availability and supply of locally produced cereals are below average at both household (poor and lower middle) and market levels due to six consecutive seasons of poor crop production and an increased demand from neighboring areas and IDPs from Mogadishu. Most of the poor and lower middle wealth groups in the Shabelle regions are increasingly reliant on market purchases. Cereal stocks are readily available in Bay region due to an average Gu '06 (98% PWA), a bumper harvest in Deyr '06/07 (228% of PWA), followed by a good Deyr '07/08 crop production (129% of PWA).

Cereal Prices

Maize and sorghum prices show an upward trend in all markets of southern Somalia and have increased by 120% - 210% since Jan. '07 (Figure 3). In the Shabelle regions, maize prices are 92% higher than the 5- year average due to a combination of low cereal production and supply, and increased demand for cheaper locally produced cereals following hyper-inflation in imported food prices. In the Juba regions, maize prices vary between markets with the highest maize prices recorded in Lower Juba. For instance, in Jamame, maize prices are 276% higher than Jan. '07. Maize prices in Middle Juba are lower than those in Lower Juba due to the improving cereal production in the last three consecutive seasons.

Sorghum prices throughout the Sorghum Belt are high, however the price varies between regions depending on the seasonal crop production performance (Figure 4). The highest sorghum prices are noted in Beletweyne, Hiran region where in Dec.'07 sorghum prices are 112%, and 135% higher than July '07 and 5-year average ('02 - 06), respectively. High prices in this region are due to five consecutive poor seasonal cereal production, the impact of IDPs in the region, and inter-regional trade restrictions due to insecurity. In contrast, the increase of sorghum price in Bay region is not as dramatic. The sorghum price in Dec. '07 is 39% higher than the July '07 price and 51% higher than the 5- year average.

The bulk of the Deyr '07/08 cereal production from southern Somalia is expected to enter into the markets by mid-Feb. '08, therefore in the next two months prices of local cereals may decline slightly in some areas. However, prices are likely return to an upward trend until the coming Gu '08 harvest due to the second lowest annual cereal production in a decade and restrictions in the inter-regional cereal trade in southern Somalia due to civil insecurity. In the coming months, FSAU/FAO will closely monitor the flow and prices of cereals.

Purchasing Power

Generally, the terms of trade between cereal and labor from Jan. - Dec. '07 declined in all main markets in southern Somalia due to an increase of cereal prices (Figure 5).

For example, in the Shabelle regions, the terms of trade (ToT) between labour and cereals dropped by 53% and 31% in Dec. '07 compared to Jan. '07 and 5-year average, respectively. In Juba, Dec.'07 ToT is 92% lower compared to 5-year average ('02 - 06), while the ToT in the Sorghum Belt decreased significantly between Dec. '07 and Jan. '07 (44%). This is, however, only slightly lower, by 16% compared to the 5-year average ('02 - 06).

Figure 3: Regional Trend in Cereal Prices (SoSH)

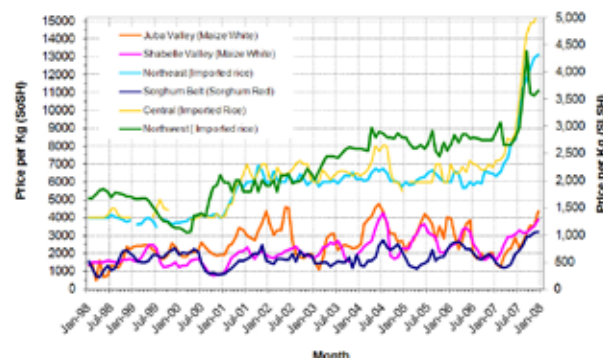


Figure 4: Sorghum Belt, Trends in Sorghum Prices

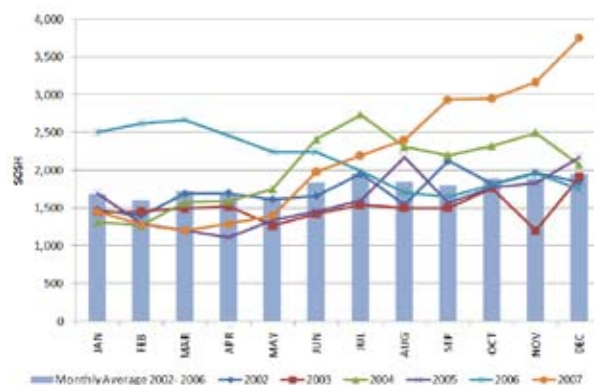
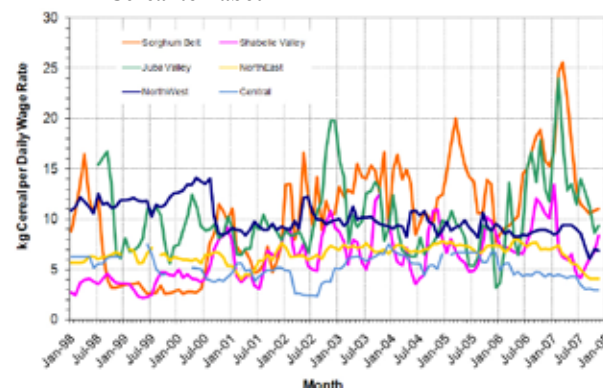


Figure 5: Regional Average monthly Terms of Trade: Cereal to Labour



LIVESTOCK

Rangeland Conditions

Rangeland conditions in most pastoral areas are good to average, with the exception of the drought affected areas of Central regions (Galgadud and southern Mudug) and Hiran where pasture and water conditions are continuing deterioration. Acute water shortages and poor pasture will be continuing problems in these areas during the long dry *Jilaal* season (Jan. – March) in these areas. In Galgaduud, south Mudug and Hiraan regions, poor rainfall in both the *Gu* '07 and *Deyr* '07/08, has resulted in continuous water trucking in some areas as early as June '07, and will increasingly be required until the onset of the *Gu* rains (until mid-April '08). Localized areas in Togdheer, Sanaag, coastal areas of Shebelle, northern Gedo and parts of Bakool regions are also deteriorating due to below normal localized *Deyr* '07/08 rains. Areas of concern in the northeast and northwest (parts of Addun and Coastal Deeh livelihoods) during the *Gu* '07 have had their *berkads* and shallow wells replenished and there is also improved rangeland conditions.

Livestock Migration

Normal opportunistic livestock migration is ongoing in most of the country, with the exception of stressed abnormal migration in Hiran and Central regions and a few pocket areas in the north (Map 6). In Galgaduud region some livestock out migrated to Hawd of Mudug and Zone 5 of Ethiopia, however, most herds were forced to remain within the region due to insecurity, where water and pasture are extremely poor. In Beletweyn and Buloburte livestock moved to Jalalaqsi district due to poor pasture availability, however, once again insecurity has limited herds to out migrate to other neighboring regions. Herds in the Nugal livelihood zone of Sanaag region out migrated to north Togdheer region, Sool plateau livelihood zone of Sanaag region out migrated to Bari region, while herds in parts of the Hawd livelihood zone of Togdheer out-migrated to Sool region and Zone 5 of Ethiopia. Coastal Deeh livestock of Shabelle and Juba regions are reported to have migrated to the riverine areas for better pasture. Part of Bakool livestock out migrated to Zone 5 of Ethiopia, while another part migrated to Bay region.

Livestock Body Conditions and Herd Growth

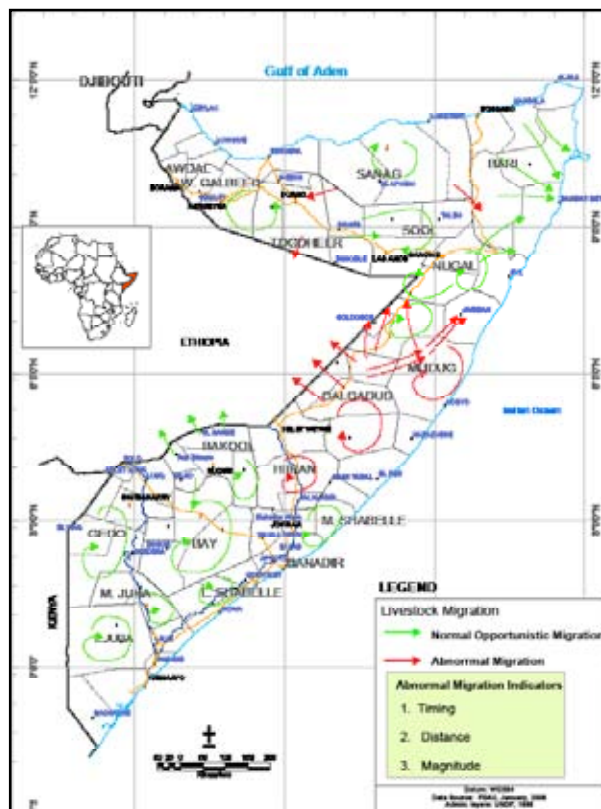
Livestock body conditions are good to average in most areas due to overall improved pasture and water conditions, except in Central regions which is poor and deteriorating for all species and parts of Hiran region where body conditions for cattle are poor to deteriorating. The *Deyr* '07/08 season calving /kidding rate for camels and sheep/goats is high in the northwest, northeast, Central, Hiran, Shebelle, Bay/Bakool, and Gedo regions. However, in the Juba and Shabelle regions cattle and sheep/goats calving kidding rate is medium due to the high to medium conception rates in *Deyr* '06/07 for camel, *Gu* '07 for cattle, and *Gu/Hagaa* '07 for goats.

The FSAU *Deyr* '07/08, pastoral herd dynamics model indicates an increasing trend in herd sizes compared to the start of *Gu* '07 (April '07). For example, cattle pastoralists are showing an increasing trend, although they have not yet reached baseline levels and will likely require three more seasons to fully recover. These include the Dawo pastoral of Gedo and Southeastern Pastoral of Juba regions. Herd growth in camel and sheep/goats in all the regions, indicates an increasing trend and have reached above baseline. The exceptions are Sool plateau of Bari and Sanaag regions where camel baseline herd size did not recover from the 2004 drought. In contrast, in the Central regions herd levels have decreased over the last six months due to additional off-take to cover water trucking costs and increased food prices. Generally, there are no outbreaks of major livestock diseases, however, pneumonia (PPR) is reported in Golis/Guban livelihood zones in the northwest regions affecting specifically goats.

Livestock Prices and Pastoral Purchasing Power

Prices of all livestock species have increased compared to the 5-year average, however, there is a slight decline in the local quality goat prices in central regions and in all livestock prices in the northwest regions following the Hajj period and the reduced demand from external markets (Figure 6). Average monthly prices in 2007 for cattle in the Sorghum Belt, Shebelle and Juba regions are 91%, 24%, and 23% higher compared to the 5-year averages ('02-06). The Dec. '07 prices are 95%, 87% and 153% higher when compared to 5-year averages of December ('02-06). Similarly, average monthly prices for 2007 for export quality goats in the northeast, northwest and Central regions are 27%, 27% and

Map 6: Somalia Livestock Migration Trends
(Dec. '07 - Jan. '08)



19% higher than 5-year averages ('02-06), respectively and in the Dec. '07 prices are 44%, 11% and 41% higher when compared to 5-year averages for December ('02-06). Average terms of trade for livestock to rice in central and northeast regions are 27% and 11% lower compared to five year average, respectively, due to significant 2007 average price increase of imported rice and local cereals in northeast by 155% and 125% when compared to 5-year average ('02-06) and increased in Dec. '07 by 203% and 136% when compared to Dec '06. In Central regions, Dec. '07 average price of imported rice and local cereals increased by 228% and 119% when compared Dec '06 (Figure 7).

Livestock Exports

Cross-border cattle marketing between Somalia and Kenya has improved due to the high demand from Kenya. Generally, livestock sale volumes have increased due to opportunities of livestock trade to Saudi Arabia and Gulf States as per agreement of a one year contract reached between Puntland/Somaliland authorities and Saudi Arabia traders. Livestock exports during 2007 through Berbera and Bossaso ports reached 3,273,418 heads of which 93% was sheep and goats. This is 33% higher compared to the '02-06 average (2,046,406 heads), and almost as high as the peak pre -1998 ban export figures. The export ban of chilled meat from Somalia to the Gulf States has not been officially lifted, however, there has been an increase in the volumes exported over the last two months. In 2007, Burao abattoir h exported a total of 70,310 carcasses, which 42% lower compared to '06 (121,858 heads), while Galkayo abattoir resumed operations and exported 31,639 carcass heads.

MARKETS

The Mogadishu conflict is limiting trade and economic activities in most southern and central markets and is particularly affecting the Mogadishu main (*Bakaara*) market and the seaport where traders are reporting a slowdown of activities over the past year. The majority of traders have closed their business, due to uncertainty and insecurity. Imported food commodities, such as rice, sugar, vegetable oil, and wheat flour are in short supply as a result of increased levels of insecurity, renewed marine piracy, the imposition of new port tariffs, and disruptions in the regional markets. In addition to the limited availability, the sharp devaluation of the Somali Shilling is affecting imported commodity prices. In the *Bakaara* market, the Somali Shilling lost value in the last year by 59% from Sosh 13,850 in Dec. '06 to 22,000 per US dollar in Dec. '07 (Ref. FSAU Market data Update, Jan. '08). However, when compared to the 5-year Dec. average, the shilling lost 33% during the same period.

In the Shabelle and Central regions, rice increased by 20% and 49%, respectively between July '07 and Dec. '07 (Figures 8 and 9) and 118% and 158%, respectively, when compared to the 5-year average. Fuel prices, especially petrol, have also increased by an average of 52% in the last year (Dec. '06 and Dec. '07) in most southern markets due to increased and high global fuel prices. The combination of the effects from the seasonal price changes, inflation, increasing road blocks, market disruptions, and lack of employment opportunities (especially in the Shabelle and Central regions) are having a direct impact on food and livelihood security, especially for the urban poor and IDPs who are dependent on market purchases.

Figure 6: Regional Trend in Local Quality Goat Prices (So.sh/SL.Sh)

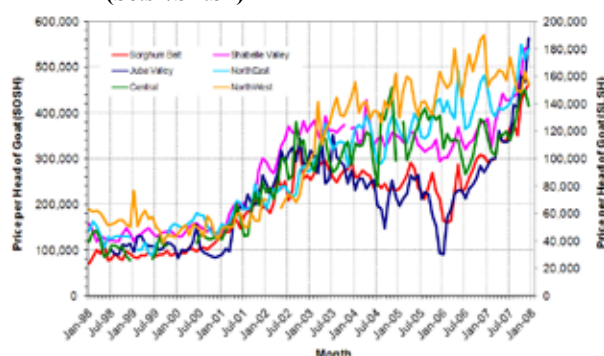
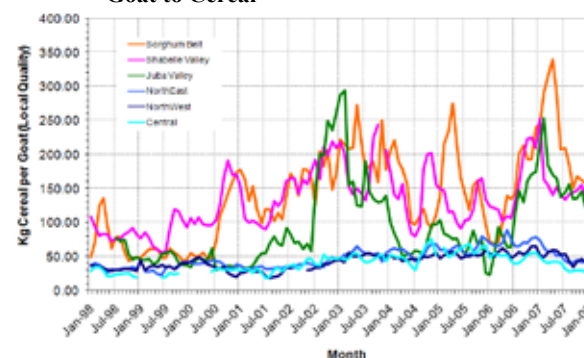


Figure 7: Regional Trend in Terms of Trade Local Quality Goat to Cereal



In 2007, Burao abattoir h exported a total of 70,310 carcasses, which 42% lower compared to '06 (121,858 heads), while Galkayo abattoir resumed operations and exported 31,639 carcass heads.

Figure 8: Shabelle Valley: Trend in Imported Commodity Prices compared to Exchange Rate

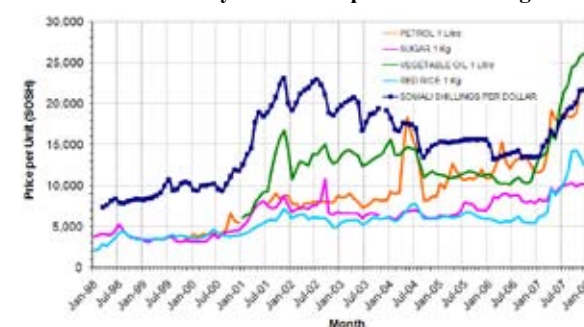
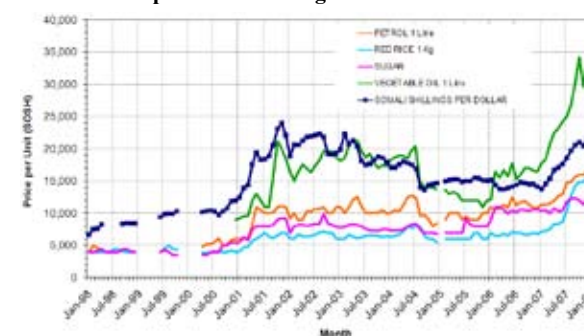


Figure 9: Central: Imported Commodity Prices compared to Exchange Rate



NUTRITION

An integrated analysis of the nutrition information¹ collected from July to December 2007 indicates a varying nutrition situation throughout the country (Maps 7 and 8). Civil insecurity in Mogadishu, the impacts of on-going displacement of people into neighbouring regions and a deepening drought in Central regions are key driving factors in the current analysis in parts of South Central Somalia. In addition, hyper-inflation of costs for basic food and non-food items throughout the country is creating problems of food access for urban populations especially the urban poor, while morbidity and poor child care practices underpin the chronic sub-optimal nutrition situation in most of rural Somali populations.

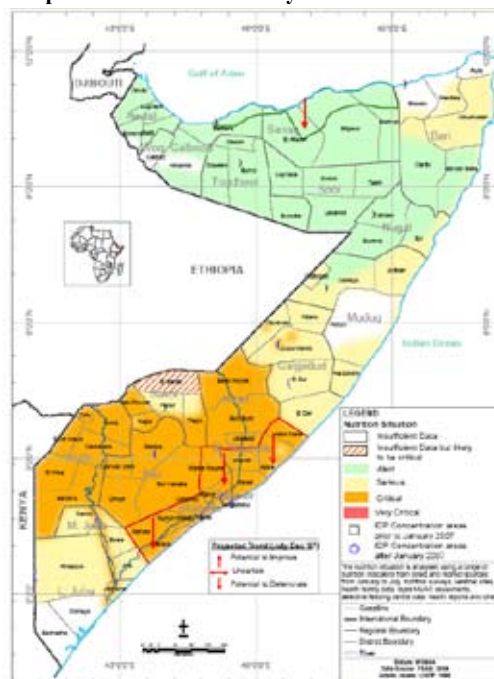
From this analysis, of most concern is the deterioration in the Central regions (Galgadud and Mudug) and southern Nugal regions which has resulted in rates of global acute malnutrition (GAM) of **17.2%** in the Hawd and **15.9%** in the Addun pastoral livelihood zones, both of which are above the emergency² threshold of 15% and indicate a **Critical** nutrition situation. In the Shabelle agro-pastoral and new IDP population groups (Afgoye and Merka), the nutrition situation also remains **Critical** with a GAM rate of **17.5%** and **15.2%** respectively³ from two surveys conducted in November, thus indicating no change from the earlier surveys in May. Similarly, a sustained **Critical** nutrition situation is reported in the Hiran Riverine population with GAM⁴ rate of **17.5%**. The agro-pastoral results do not indicate any significant change from the earlier assessment conducted in March. The worrying nutrition situation in the Central, Shabelle and Hiran population groups is as a result of cumulative shocks, including civil insecurity in Mogadishu that has led to loss of livelihoods and massive displacement of people into these areas thereby exerting pressure on the limited resources (water, health care). In the Central regions, about 40% of households sampled in the November 2007 surveys reportedly either being new IDPs or hosting recently displaced people.

These factors, compounded with poor access to milk, poor child care practices, and poor sanitation (especially for Hiran) have aggravated diarrhoeal incidences and thus acute malnutrition. Analysis of nutrition surveys conducted in Somalia (n=105) over the last seven years has highlighted a strong association with acute malnutrition and reported diarrhoea.

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), even when there has been improved availability and access to food.

A **Critical** nutrition situation also persists in most parts of Bay and Bakool regions and Juba Riverine populations. An outbreak of acute watery diarrhoea (AWD) reported in Baidoa in December 2007 (WHO), in addition to continuing influx of IDP from Mogadishu, has contributed to a **Very Critical** nutrition situation in the Baidoa new and protracted IDPs camps. Protracted IDPs in Bossasso also face a **Very Critical** nutrition situation, again linked to their specific vulnerabilities. For Gedo, following an integrated analysis of data from a rapid nutrition assessment based on the mid upper arm circumference (MUAC) in December 2007, health information system and the admission trends of malnourished children into selective feeding programs the nutrition situation remains **Critical** but stable. However, some positive changes in the nutrition situation have been reported in parts of the country. In the Shabelle

Map 7: Nutrition Status July '07



Map 8: Nutrition Status January '08



1 The analysis was conducted on a range of nutrition information collected from July to December 2007 including 19 surveys (16 by FSAU and partners, 2 by ACF and 1 by MSF Spain between Sept-Dec 07), 110 Health facilities, Rapid MUAC assessments in conducted in 93 sites, data from partners on feeding centers, WHO Acute Watery Diarrhoea Updates and other secondary data.

2 The Hawd Pastoral population recorded a GAM rate 17.2% (14.1-20.5) and a SAM rate of 1.3% (0.6-2.1) with 15.9% (12.8-18.9) GAM and 1.6% (0.8-2.6) SAM recorded in the Addun Pastoral population.

3 The Shabelle Agropastoral population recorded a GAM rate 17.6% (13.3-21.8) with a SAM rate of 3.2% (1.7-4.6); IDPs in Afgoye/Merka recorded a GAM rate of 15.2% (11.7-18.6) and a SAM rate of 3.2% (1.9-4.5). The riverine population recorded a GAM rate of 14.0% (11.2-16.7) and a SAM rate of 2.9% (1.6-4.1).

4 The Hiran Riverine population recorded a GAM rate 17.5% (114.5-20.4) and a SAM rate of 2.5% (1.5 – 3.6)

riverine population the GAM levels have reduced from 17% in May 2007 to **14%** in November 2007. This reduction is likely linked to increased access to humanitarian interventions, fish, fruits and vegetables. In addition, the acute watery diarrhoea outbreak in February 2007 contributed significantly to the **Critical** nutrition situation in the *Gu* '07 has been controlled with positive impact on nutrition, also observed in the Hiran Agropastoral population. Wajid area has also indicated some improvement, though not statistically significant from *Critical* rates in February, to **Serious** rates in October. In Bari region in the Northeast, the nutrition situation has improved from *Serious* in the *Gu* '07 to the current **Alert** phase, associated with increased access to meat and milk products following good *Deyr* '07/08 rains that has resulted in improved livestock conditions and calving. The situation in Dhusamareb⁵, the Coastal Deeh, Juba and Huddur district remains **Serious**. In the Northwest and other parts of the Northeast, the situation remains in the **Alert** phase, except for protracted IDPs in Berbera and Burao currently in a **Critical** nutrition situation, with the same population in Hargeisa slightly better off, in a **Serious** nutrition situation.

A summary of the findings from all nutrition assessments conducted in Somalia in 2007, in addition to nutrition information from sentinel sites, rapid MUAC assessment health facility data and other relevant information since the *Gu* '07, is provided in this Nutrition Update.

5 ACF led Nutrition Survey in November 2007 reported GAM rate of 12.4% and SAM rate of 0.6%

REGIONAL HIGHLIGHTS

GEDO REGION

The current food and livelihood security situation of Gedo region has improved significantly from the 2005/06 drought. Currently, the number of people in need of assistance in Gedo region are **8,000** people from Juba Pump Irrigated Riverine and Southern Agro-pastoral livelihood zones who are in **Humanitarian Emergency (HE)** and **35,000** people from all livelihood zones, except Southern Inland Pastoral, who are in **Acute Food and Livelihood Crises (AFLC)** (Map 1 and Table 1). Good rainfall was recorded during the *Deyr* '07/08 season in southern Gedo, which is the main cereal producing district of the region. This has resulted in increased cereal production for the Southern Agro-pastoral, Bay/Bakool Agro-pastoral (sorghum), and Riverine (maize) livelihood zones in Bardhera district.



Bardhere, Gedo: Deyr '07/08 Rain-fed Sorghum, Dec. '07

In contrast, however, *Deyr* '07/08 cereal production in Riverine, and Southern Agro-pastoral zones in the northern Gedo districts (Budubo, Garboharey, Beledhawo, Dolo and Luuq) failed due to below normal rains and limited access to pumps for irrigation. For all pastoral and agro-pastoral livelihoods, average to good livestock body conditions and high kidding/calving rates for camel, cattle and sheep/goats has improved milk availability and accessibility. In addition, high livestock prices and low cereal prices has improved terms of trade (goat to cereal), whereby one goat can be traded for 250kg (5 bags) of cereal to 1 goat in Dec. '07, which is the highest terms of trade in all of Somalia. An integrated analysis of data from a rapid nutrition assessment (based on the Mid-Upper Arm Circumference (MUAC) in Dec. '07), health information system, and the admission trends of malnourished children into selective feeding programs, indicate a **Critical**, but stable nutrition situation across all major livelihoods in Gedo region. These results are in line with the historical nutrition trends for Gedo, which has highlighted sustained critical levels over the past 10 years.

LOWER AND MIDDLE JUBA REGIONS

Overall, the food and livelihood security of Juba regions has shown a continuous and significant improvement since the drought and floods of '05/06. Currently in Juba regions, the number of people in need of assistance is **15,000** people in Jamame and Kismayo riverine of Lower Juba who are in **Humanitarian Emergency (HE)** and **80,000** people who are in **Acute Food and Livelihood Crises (AFLC)** in Lower and Middle Juba Agro-pastoral, Riverine and Southeast Pastoral livelihood zones. This *Deyr* '07/08 season exceptionally good rains fell in many parts of the region, which improved cereal production for the most sorghum producing southern agro-pastoral livelihood. In contrast, the maize production from the Juba riverine livelihood zone declined due to the combination of increased sesame production and poor rainfall in Jamame district, as well as the riverine zone of Kismayo district. All coastal areas received poor rainfall, but the impact was minimal as these areas mostly depend on livestock and fishing. Livestock herd sizes, especially

camel and sheep/goats, have mostly recovered from the drought, while cattle herd sizes gained significantly, but will need several more seasons to reach normal baseline levels. Livestock owners have also benefitted from increased milk and meat availability, high livestock prices, and improved terms of trade.

In the Juba regions, the nutrition situation remains **Serious** in the pastoral and agro-pastoral populations and **Critical** in the riverine population (*See Nutrition Map*). Although rates of global acute malnutrition were at serious levels in riverine populations, the rate of severe acute malnutrition at 4.4% indicated a **Critical** situation. High rates of severe acute malnutrition are endemic in Juba riverine populations, particularly due to the high proportion of oedema cases, where 60% of the SAM cases in the surveys were children with nutrition oedema, also known as kwashiorkor. Overall, in all Juba livelihood zones, the nutrition situation depicts sustained improvement from **Critical** levels and **Very Critical** levels observed in the region since 2004.

BAY & BAKOOL REGIONS

The overall food security situation of pastoral and Agro-pastoral livelihoods in Bay region is generally normal, with the exception of agro-pastoralists in the localized areas of Berdale and Mowlimaad, which have deteriorated to a phase of **Acute Food and Livelihood Crisis** due to two consecutive seasons of below normal crop production. Average Deyr '07 rains in most of the region resulted in average to good cereal production (129% and 103% of PWA and 5-year average, respectively), improved availability of water pasture and browse, and overall enhancement in livestock conditions and production. Currently about 5000 people are in **Humanitarian Emergency (HE)** and 150,000 in **Acute Food Security and Livelihood Crisis (AFLC)**.



Sorghum Crop Failure, Wajid, Bakool, Dec. '07

In contrast, however, the situation varies considerably in Bakool. While the overall Deyr cereal production in Bakool is 165% and 114% of the PWA and 5-year average, this is due to very good cereal production in pockets in south Wajid, northern parts of Tieglow and Huddur districts. Poor rains in significant parts of agro-pastoral areas (Rabdure, Elberde and north Wajid, southern parts of Tieglow and Huddur districts) resulted in poor or failed crops in these areas. In addition, it is reported that there is deterioration in vegetation conditions (pasture and browse), acute water shortages, low livestock milk production, as well as livestock movements towards Bay region and cross-border to Ethiopia. The usual social support (zaka) from cereal production is also reduced as a result of localized crop failure. Poor agro-pastoral households in the worst affected areas are experiencing very low purchasing power due to poor crop production, limited access to labour, increasing cereal prices, low milk production. As a result, households are having to increase their livestock sales to cope, which may lead to herd size reductions below baseline levels. The price of sorghum in Dec. was 128% and 69% higher than Dec. 5-year average and Dec. '06, respectively. Sorghum prices are expected to continue to increase over the next 5 months.

The overall nutrition situation in most parts of Bay and Bakool regions remains **Critical**, indicating a persistence of a similar situation as recorded in Gu '07 (*See Nutrition Maps 1 and 2*). The only exceptions are in Wajid and Huddur districts, where the nutrition situation is classified as **Serious**, showing some slight improvement in Wajid, and a stable situation in Huddur since the Gu '07 analysis. In the Baidoa IDPs, a slight deterioration to **Very Critical** has been noted from the Gu '07 analysis, likely due to the recent acute watery diarrhoea (AWD) outbreak in the camps, in addition to ongoing influx of new IDPs.

SHABELLE REGIONS

The food security and nutritional situation of the two main riverine and agro-pastoral livelihoods in Shabelle region continue to be in a state of **Humanitarian Emergency** and **Acute Food and Livelihood Crisis**, with an early warning level of **Watch** (riverine) and **Moderate Risk** (agro-pastoral and pastoral) to further deterioration over the next 6 months. Currently, about 150,000 and 68,000 people along the riverine areas of Shabelle are in **Humanitarian Emergency** and **Acute Food and Livelihood Crisis** phases, respectively, and are in need of emergency and livelihood support. Similarly, 240,000 and 125,000 of agro-pastoral people in both Middle and Shabelle regions are in the phases of **Humanitarian Emergency** and **Acute Food and Livelihood Crisis**, respectively.

Key indicators maintaining the humanitarian situation are poor Deyr '07 rains, low cereal production following 5-6 successive seasons of poor crop productions, high local cereal and imported commodity prices due to the continued and increasing inflation, which have an adverse impact on both local and imported food prices and non food commodities (diesel), and increasing civil insecurity in the region. On top of these factors, is the swelling number of IDPs from the ongoing insecurity in Mogadishu which is adding to the humanitarian situation in the region. Overall, Deyr

'07/08 cereal production in Shabelle is estimated at 55% and 53% of PWA and 5-year average, respectively. *Deyr* '07/08 was another poor season due to insufficient rains, worsening irrigation infrastructure, river breakages, coupled with unaffordable input prices (high tractor costs, seeds etc) and increased pests (aphids, antigastra, stalkborer and birds). The purchasing power of the poor wealth groups of the two livelihoods were seriously affected by the unusual increases in local maize and sorghum prices, a rise of 104% and 92% during Dec. '07 compared to maize price in Dec. '06 and Dec. 5-year average (2002-2006), respectively (Figure 10). Sorghum prices have also increased 53% and 37% over the same period. Similarly, imported food prices, particularly rice, vegetable oil, and fuel are at record high levels, with more than a 100% increase in prices. Other stress factors include the continuing influx of IDPs from Mogadishu, which is having a negative impact on host communities.

Figure 10: Shabelle Region, Trends in Maize Prices



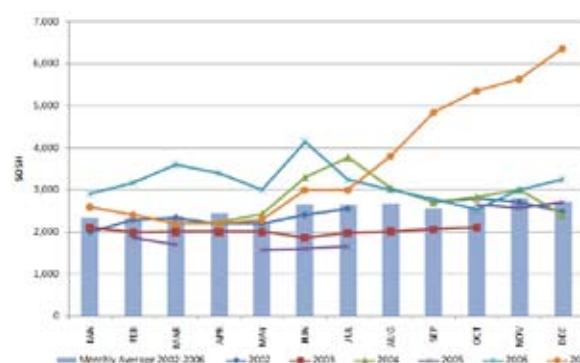
In the integrated nutrition situation analysis conducted by FSAU and partners in the Post *Gu* '07, Middle and Lower Shabelle regions were classified to be in the **Critical** nutrition situation with a risk of further deterioration, associated with high disease incidence, including acute watery diarrhoea, which had been exacerbated by the *Deyr* '06/07 floods. The current integrated post *Deyr* '07/08 analysis indicates a persistent **Critical** nutrition situation in Shabelle agropastoral population, as well the new IDPs in Afgoye and Merka. However, the nutrition situation in Shabelle riverine indicated some improvement from the Critical situation in *Gu* '07 to current **Serious**, likely as a result of increased humanitarian interventions, as well as increased access to fruits and vegetables.

HIRAN REGION

In Hiran region, the humanitarian situation of agro-pastoral and riverine livelihoods has continued to deteriorate since Jan. '07. Those in **Humanitarian Emergency (HE)** now include 100% of the poor and 50% of the middle wealth group riverine population, representing 20,000 people. Another 51,000 people are in **Acute Food and Livelihood Crisis (AFLC)** representing 25% of the middle wealth group riverine and 100% of poor for agro-pastoral population. The humanitarian situation of Hawd/Addun pastoral bordered to central regions have deteriorated further since last *Gu* '07 from **Generally Food Insecure (GFI)** to **Acute Food and Livelihood Crisis (AFLC)** with high risk of **Humanitarian Emergency**. Therefore, 4,000 people are in (HE) representing 25% of the poor. Another 13,000 people of the same livelihood fall **Acute Food and Livelihood Crisis (AFLC)** representing 75% and 25% of poor and middle, respectively.

This deterioration is due to rain-fed crop failure as a result of below normal *Deyr* '07/08 rains (50-70% of LTM), extremely low production from the riverine areas due to the fear of flooding at the onset of the *Deyr* '07/08, and high fuel prices. Cereal production for *Deyr* '07/08 in Hiran region is 2,390 MT, which is 36% of the *Deyr* '06/07, 33% of the 5-year average and 34% compared to PWA. The pastoralists have also experienced a deterioration due to poor *Deyr* '07/08 rainfall in the area. Factors that have contributed to the deterioration are the early water trucking, beginning in Nov. '07, combined with the higher costs of water trucking, deterioration in rangeland resources (water and pasture) resulting in poor livestock body conditions, and the reduction in the numbers of the sellable animals.

Figure 11: Hiran Region, Trends in Sorghum Prices



The prices of the staple cereals (both locally produced and imported) are at an all time high (Figure 11). Despite these record prices the terms of trade is still favorable. For example, TOT (labor/cereal) for the poor wealth group increased in Dec. '07 by 18% and 9% compared to Dec. '06 and 5-year average, and has been stable since July '07. For the middle wealth groups, TOT (goats/cereal) increased in Dec. '07 by 12%, 8% and 2% compared July '07, Dec. '06 and 5-year average. The nutrition situation analysis remains **Critical** for the riverine population in Hiran region, while the agropastoral/pastoral areas indicate a slight improvement from the *Gu* '07 analysis from **Critical** to **Serious**. However, this change is not statistically significant compared to the levels reported in *Gu* '07. This slight improvement could be due to the lack of disease epidemic during the most recent round of assessments, unlike the previous assessments in the *Gu* '07 where a serious AWD outbreak was reported. However these levels are consistent with findings from historical nutrition survey data conducted in the region thus highlighting the nutritional vulnerability of this population.

CENTRAL REGIONS

Central regions are now in **Acute Food and Livelihood Crisis (AFLC)**, with a **high risk** to **Humanitarian Emergency (HE)** within the next six months due to the compounding impact of multiple shocks, including successive seasons of below normal rains. The impact has resulted in extended periods of water trucking (from June '07 to date), associated high water trucking costs (200% higher compared to last Deyr), and a deterioration in rangeland resources (water and pasture) resulting in poor livestock body conditions. In addition, there is high and rapid inflation in food and non-food commodity prices, as well as disrupted economic activities, and trade. The Central regions also are hosting one of the largest number of IDPs from Mogadishu, face recurrent civil insecurity and conflict, as well as increased acute and severe malnutrition levels. The early warning has changed to '**high risk**' for the entire central region during the period of Jan. to June '08. 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).



Empty Berked, Elder, Galgadud, Dec. '07

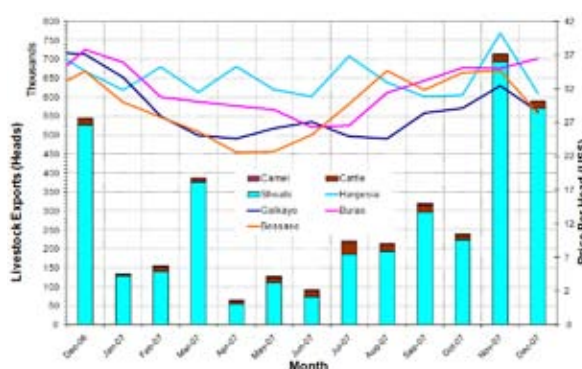
The increased cereal prices, lower terms of trade of local goat to rice, (53% lower compared to Dec. '06) and early and high costs associated with water trucking, is putting financial pressure on both pastoral and agro-pastoral households. Expenditure analysis indicates that households will have to sell extra livestock to cover the cost of the increased price of food, as well as to cover the cost of trucking water over the next few months. The projected livestock holding in June '08 as percent of baseline will potentially decline by 30%, 70% and 32% for camel, cattle and sheep and goat, respectively, due to higher off-take to cover these additional expenses. The nutrition situation in the Hawd and Addun pastoral livelihoods in Galgadud and South Mudug is **Critical**. The exception is the operational areas of MSFB and ACF in Dusamareb and Guriel districts, where the situation is **Serious**, therefore, possibly linked to humanitarian support. These results indicate deterioration from the **Serious** levels reported in the *Gu* '07, with the exception of Dusamareb the coastal Dhee and the Cowpea Belt, all of which remain in a **Serious** nutrition situation. In addition, high rates of morbidity were reported in the three recent nutrition assessments in the areas, with over 30% of the children reported to have been ill in the two weeks prior to the assessment.

NORTHWEST REGIONS

All pastoral and agro-pastoral areas in northwest regions remain in the same phase of **Generally Food Insecure (GFI)** identified at the post Deyr '07 assessment. Localized areas in Hawd Togdheer, Nugal Valley, Sool plateau of Sanaag and Sool regions are identified with **Watch**, due to below normal rains in Oct. –Dec. '07 (20-40% RFE), and water shortages are expected during the *Jilaal* season (Jan - June '08). Pasture and water availability is good to average in other livelihood zones. Livestock body conditions are good to average throughout the regions. Camel calving rates are high with normal daily milk yields. Sheep and goat kidding rates are low to medium and this improved milk availability and accessibility in all livelihood zones for household consumption and sales. Livestock holdings have continued to increase over the last four years. As of Dec. '07, camel herd size as a percent of baseline are 187%, while sheep and goats are 168% in *Hawd* and *Golis* and *Guban* livelihood zones. No outbreak of diseases have been reported, although, endemic diseases are affecting small ruminants.

Pastoralists in the northwestern regions have normal access to sellable animals to overcome the record high imported food commodity prices. Localized livestock migration in search of pasture and water is observed in some areas. These include the livestock in rain deficit areas of Togdheer (*Balliweyn*) that moved to Somali Region of Ethiopian, livestock in Sanaag south moved to North Togdheer, livestock from Sanaag east moved to Bari region, and livestock in the *Hawd* of Sool moved to Mudug regions. In the northwest agro-pastoral areas, *Gu/Karan* crop production is estimated at 26,739 MT, which is 107% of *Gu* '06 and 149% of PWA (1998-2006). Due to the current above average cereal production, availability and supply of locally produced cereals in the main markets is average. Regardless all household wealth groups have sufficient cereal stocks that can last up to 7-9 months.

Figure 12: Berbera & Bossaso Livestock Export (Heads) and Export Quality Goat Prices (USD)



The total number of livestock exported in 2007 through Berbera port was 1,633,793 heads, which is 31% higher than exported in 2006 (1,125,683 heads) (Figure 12). The export ban on chilled meat from Somalia to the Gulf States has not been officially lifted, however, there has been an increase in the volume exported over the last two months. In 2007, Burao abattoir exported a total of 70,310 carcasses, which is 42% lower compared to 2006 (121,858 heads). Export quality goat prices declined by 10% in Dec. '07 (US\$34/head) compared to Dec. '06 (US\$38/head), resulting in a decline in terms of trade (ToT) 38% and 20% when compared to Dec '06 and 5-year Dec. average TOT, due to high imported cereal prices. Integrated analysis of the *Deyr* '07/08 nutrition information indicates that the situation remains at **Alert** levels in Nugal Valley, Sool Plateau, Hawd, Guban, and agro-pastoral livelihood zones. The Golis and Gebi livelihoods that showed a likelihood of deterioration during last post *Gu* analysis has improved and currently at **Alert** level. FSAU conducted nutritional assessments in Sept. '07 in the IDP camps. The nutrition situation remains **Critical** for the protracted and recent IDPs in Berbera and Burao, and **Serious** for Hargeisa IDPs. This is consistent with the historical data on nutrition surveys conducted in these Northwest IDP settlements, highlighting their nutritional vulnerability.

NORTHEASTERN REGIONS

All pastoral areas in the northeast regions remain in the usual phase of **Generally Food Insecure (GFI)**. Pastoralists of the Addun and Coastal Deeh in Eyl, Jariban, and Galkayo districts that were identified with **Moderate Risk** to deterioration during *Gu* '07, have now received average rainfall and reversed the situation to normal. Most of the *berkads* and shallow wells in the Addun and Coastal Deeh pastoral livelihood zones were replenished and pasture and grazing conditions have been regenerated and improved to average. Pastoralists returned to their livelihood zones where they will have access to free water and abundant pasture.

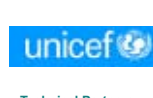
Livestock body conditions for all species are average throughout the northeast. Camel milk production is good to average as the calving rate in *Deyr* '07/08 is high and improved milk availability and accessibility throughout livelihood zones. Camel and sheep/goat herd sizes have completely recovered and increased to high levels (160-170% and 110-180%) as compared to baseline herd sizes. However, Nugal and Sool pastoral livelihood zones, camel herd size have not recovered from the severe drought loss of '02 – '04 and are still below baseline. No livestock disease outbreak has been reported, however, common diseases, such as tick born disease and endo-parasites, are affecting sheep/goats and camels. Pastoralists have normal access to salable animals to barter against the record high cereal prices and in some areas pastoralists have repaid most of their former cumulative debts. Localized areas in Bari, Sool and Nugal regions received poor *Deyr* '07/08 rainfall, but all wealth groups easily migrated to within or adjacent livelihood zones where both pasture and water is abundant.

Bossaso livestock exports improved significantly from the impact of the livestock ban in Dec '06. However, livestock exported during 2007 through Bossaso port was 1,639,625 heads, which is still 14% below 2006 exports (1,915,598 heads), due to the monsoon restricting the loading of small vessels and a disagreement between the local livestock traders the Puntland authorities and the Saudi livestock trader. Overall, livestock prices have improved. Goat export quality prices in northeast in Dec. '07 are higher by 24% and 55% compared to Dec. '06 and 5-year average of Dec. prices ('02 -'06). Over the same time period, rice prices in the northeast in Dec. '07 were higher by 103% and 116% compared to Dec, '06 and to 5-year average of Dec. prices ('02-06). 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 and market disruption. The nutrition situation in most areas in the northeast region is **Alert**. This indicates some improvement in the populations in Bari region, previously classified as **Serious** in the *Gu* '07. However, of great concern are IDPs in Bossaso and Galkayo where the nutrition situation is classified as **Critical** or **Very Critical**. These elevated rates are due to the specific vulnerabilities faced by these protracted IDP groups. The current situation is consistent with historical data on nutrition surveys conducted in IDPs and rural livelihoods in the northeast region. In addition, in the Addun and Hawd Livelihoods of Mudug and Nugal regions, the nutrition situation has deteriorated from **Serious** to **Critical**, due to the past challenges of food insecurity faced by the population in these pastoral livelihoods between July – Dec '07.

Recent and forthcoming publications and releases

FSAU Press Release, January 31, 2008
 FSAU/FEWSNET Market Data Update, January 2008
 FSAU/FEWSNET Climate Data Update, January 2008
 FSAU Nutrition Update, January, 2008
 FSAU Technical Series Post *Gu* '07 Analysis, September, 2007
 FSAU Technical Series Post *Deyr* '07/07 Analysis, February 2008 (forthcoming)

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



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