

KEY ISSUES

Findings from the 2015/16 post Deyr food security analysis by FSNAU and partners issued in early February 2016, based on Integrated Phase Classification (IPC), an estimated 953 000 people are in Crisis and emergency (IPC Phase 3 and 4) across Somalia between February and June 2016. Additionally, about 3.7 million people across the country are classified as Stressed (IPC Phase 2) through June 2016. The total number of acutely malnourished children under-five (based on October-December 2015 survey results) is estimated at 304 700. The food security projections were based on a number of assumptions, including a forecast of near average 2016 *Gu* (April to June) rainfall. In late February, the Greater Horn of Africa Climate Outlook Forum (February 28, 2016) issued projections for the March-May rains indicating near to above normal rainfall for most of southern and central Somalia, but near to below normal rainfall in most parts of the North and some parts of the South. Nevertheless, the results of recent FSNAU's rapid field assessment (March 2016) and a monthly monitoring of food security indicators suggest that the above estimates of population in acute food insecurity remain unchanged.

The 2016 *Jilaal* dry season (January – March) was hotter and drier than usual, particularly in parts of northern regions, including pastoral livelihoods of Northern Inland Pastoral (Bari, Sool and Sanaag regions), Guban Pastoral (Awdal and W. Galbeed regions) as well as Northwest Agropastoral. These areas have also been affected by drought since 2015. Prolonged dry conditions in these livelihoods have led to significant degradation of rangeland resources, considerable increase in water prices and deteriorated livestock conditions with some death reported, particularly in Guban Pastoral and Northern Inland Pastoral. As a result, milk production declined in the above-mentioned drought-affected areas, where livestock reproduction was low during the preceding Deyr rainy season. The early start of the *Gu* rainy season (from late March) alleviated pasture and water stress in most of the drought affected areas. However, the negative effects on livestock production, reproduction and asset growth in the above-mentioned drought-affected areas will last at least up to the next Deyr (Oct-Dec) season. The drought situation and its impact on food security and livelihoods could rapidly deteriorate if the current *Gu* rains do not continue through the end of June.

According to the result of recent FSNAU rapid assessment, off-season harvest (maize, sorghum, sesame and cowpea), with a total estimate of nearly 3 700 tonnes, was collected in late February- early March 2016 in southern regions of Gedo, Hiran, Middle Shabelle and Lower and Middle Juba. The harvest was lower than expected due to the effects of low river water levels, dry weather conditions and damages from insects and wild animals. Cereal stocks of poor farmers diminished as usual for this time of the year, hence most poor farmers will rely on market purchases of cereals until the next *Gu* harvest, expected in July-August. Prompted by the early start of *Gu* rains, seasonal farming activities (land preparation, planting, etc.) commenced in most of the South and in the Northwest in late March 2016. However, significantly reduced river water levels in March 2016 hampered farming activities in Shabelle and Hiran regions. In April, farming activities intensified following the start of the *Gu* rainy season and improved river levels owing to good recent rains in the upper catchment of the Shabelle River in the Ethiopian Highlands.

Prices of local cereals as well as imported food commodities mostly exhibited mild changes in the first quarter of the year. Remarkably, cereal prices dropped significantly in Bay region due to declined outflow triggered by increased number of checkpoints and double taxation (government and insurgents). Prices of essential food items have also declined in government-controlled areas in the South in Bakool (Wajid and Hudur), Bay (Qansahdere and Dinsor), Gedo (Bardhere and Burdhubo) and Hiran (Bulo-Burte and Jalalagsi) regions where trade was disrupted by insurgents for nearly past two years. The observed price trend in these conflict-affected towns is attributable to increased market supply from adjacent areas due

Climate

Markets

Nutrition

Agriculture

Livestock

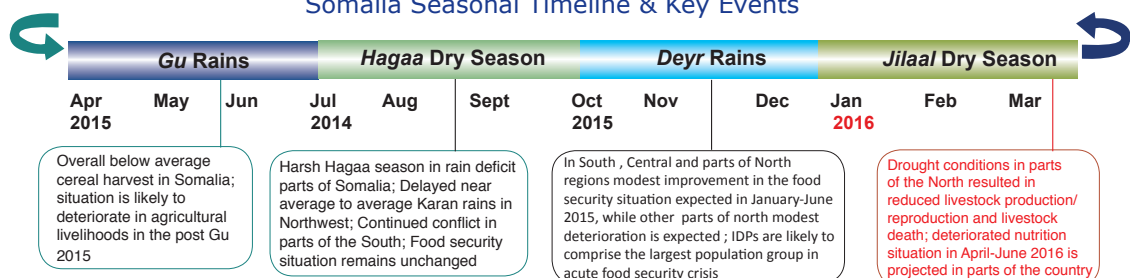
Civil
Insecurity

Emerging
Regional
Issues

FSNAU - Somalia

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

Somalia Seasonal Timeline & Key Events



to the recent better Deyr harvest; increased humanitarian assistance delivery (Bulo-Burte); opening up of secondary supply routes (in Hudur through El-Barde) and adjustments made by local traders for bringing food to these areas. In the first quarter of the year, the purchasing power of urban households (i.e. terms of trade between daily labour wages and cereals) remained stable in most regions.

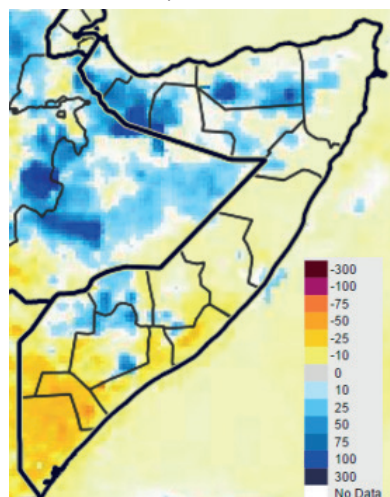
Nutrition situation has deteriorated as a result of drought in parts of Northern regions of Awdal, W. Galbeed, Sool and Sanaag. In the affected northern areas as well as in parts of South-Central zones including parts of Middle and Lower Shabelle, Lower Juba, Bay Agropastoral, Gedo region (all rural livelihoods), Hiran (Beletweyne and Mataban districts) and Coastal Deeh livelihood of Central nutrition situation has been downgraded to either *Serious* (GAM 10 - 14.9%) or *Critical* (GAM \geq 15%) for February-April 2016.

Timely and adequate humanitarian assistance, geared towards treatment of malnourished children, improved access to food, social safety nets and livelihood support are needed, at least, until the next Gu harvest in July-August 2016 in order to prevent further deterioration of the already precarious nutrition situation.

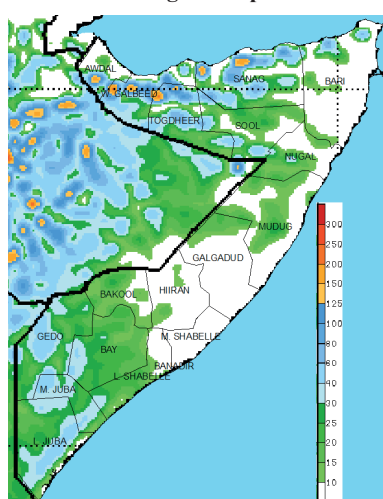
SECTOR HIGHLIGHTS

CLIMATE

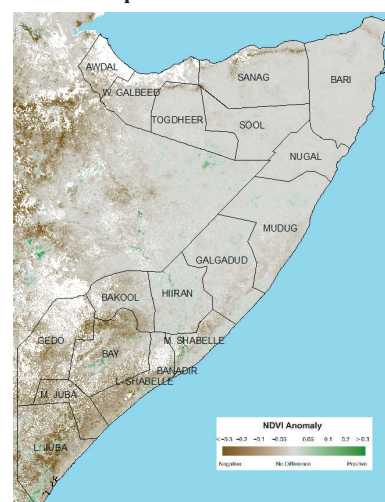
Map 1: FEWS RFE Anomaly (mm) April Dekad 1, 2016



Map 2: RFE Forecast for Week ending 28th April 2016



Map 3: E- MODIS NDVI Anomaly April 1st Dekad 2016



The 2016 long and dry *Jilaal* season (January-March) has been mild in southern and central regions due to favorable *Deyr* 2015 rains. However, the *Jilaal* was severe in the North, particularly in the rain-deficit areas of Northern Inland Pastoral (NIP) livelihood of Bari, Sanaag and Sool regions as well as Northwest Agropastoral and Guban Pastoral of Woqooyi Galbeed and Awdal regions. Both satellite derived rainfall estimates (RFE) and field reports confirmed the dry conditions in most parts of the country during the *Jilaal* season. Exceptionally, atypical light rains were experienced in localized agropastoral areas in Gedo, Bay and Juba regions in the South and parts of the Northwest in late February and early March. However, Guban Pastoral received typical *Hays* rains during January. The Shabelle River dried in early March with water levels being below historical average as a result of dry conditions in upper Shabelle River catchments in Ethiopian highlands.

In the first and second dekad of April, field reports indicate localized light rains falling in parts of the southern, central and northern regions. The rains were poor and typically below average in terms of amount and distribution (Map 1). The areas that received rains include parts of pastoral and agropastoral areas of Shabelle and Juba valleys, Bay, Bakool, Gedo and Hiraan; some parts of Galgaduud, Bari, Sanaag and Sool as well as pastoral areas of Togdheer, Woqooyi Galbeed and Awdal. The early precipitation was minimal in Nugaal, Bari and parts of Mudug regions. The satellite-derived rainfall images confirm the above-mentioned precipitation (Map 1).

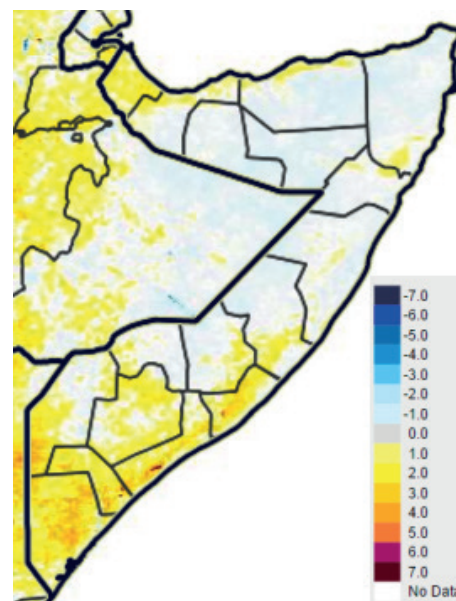
Based on the forecasts issued in February 28, 2016 by the Greater Horn of Africa Climate Outlook Forum, the March-May rains are likely to be near normal to above normal for most of southern and central Somalia. However, there is an increased likelihood of near normal to below normal rainfall in parts of the South, particularly Gedo, Middle and Lower Juba regions, and parts of Bay and Lower Shabelle as well as in most parts of the North. The risk of flooding

could be high in Shabelle basin as the upper Shabelle River catchment in Ethiopian highlands is also projected to receive normal to above normal rainfall. According to SWALIM river gauge monitoring system, in April there has been a notable improvement in Shabelle river levels to slightly above average. This improvement is attributed to recent rains in the Ethiopian side of river Shabelle catchment.

According to the United States National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Centre (CPC) one week forecast ending 4th May 2016, moderate to heavy rains (50-150mm) is expected in small to large areas of the north and southern regions, whereas most areas in Central are expected to receive 5-50mm of rains (Map 2).

The satellite-derived Normalized Difference Vegetation Index (NDVI) for the first dekad of April illustrates degeneration of vegetation for most parts of the country (Map 3). This is a result of average to below average *Deyr* 2015 rains and hotter than normal *Jilaal* dry season (Map 4). The *Deyr* 2015 rain-deficit areas in the North, particularly NIP (Sanaag, Sool and Bari), Northwest Agropastoral and Guban Pastoral are the most affected. Nevertheless, small to large areas in Gedo, Bay, Bakool, Lower Shabelle and the Jubas also show degradation of vegetation. The impact of the precipitations in April 2016 is yet to be observed.

Map 4: LST Temperature (°C) Jan - Mar, 2016



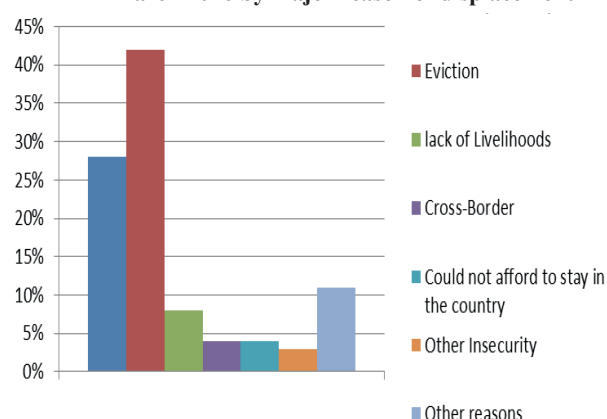
CIVIL INSECURITY

In the first quarter (January-March) of 2016, security situation of Somalia was marked with tense military activities in most southern regions (Bakool, Bay, Gedo, Lower Juba, Lower Shabelle and Middle Shabelle), but also in parts of Northeast (Puntland) and Central. Security incidences experienced in the South, particularly in the government recovered areas (Bakool, Bay, Gedo, Lower Juba, lower Shabelle and Middle Shabelle), included frequent confrontations between insurgents and African Union Mission to Somalia (AMISOM) backed by Somalia national armed forces, cases of targeted killings, explosions and suicide bomb attacks. Political conflicts and temporary unrest were also experienced in Hiran and Middle Shabelle regions, following the disagreement on modalities of regional state (Hiran/Middle Shabelle regional state) formation. Clan conflicts have also occurred in Marka district of Lower Shabelle in late March, early April 2016. Temporary displacements and tensions among the communities of central regions have also occurred on the grounds of confrontations between the already established Galmudug administration (Mudug and Galgaduud) and Ahlu Sunnah¹. In the Northeast, military engagement following insurgents' attack along the Puntland coastal districts (Bandar-Bayle, Eyl and Jeriban) and coastal part of Mudug (Galkayo) of Central resulted in disruptions of normal livelihood activities and displacements.

Rural communities controlled by insurgents continue to face forced tax payments on their private assets such as livestock, farms, vehicles and houses, occasionally leading to armed confrontations (Hiran and Galgaduud). On the other hand, the effects of trade disruptions in government-controlled areas in the South such as Bakool (Wajid and Hudur), Bay (Qansahdhere and Dinsor), Gedo (Bardhere and Burdhubo) and Hiran (Bulo-Burte and Jalagsi) regions have eased off where prices of the essential food items, both locally-produced as well as imported, are generally lower compared to the levels at the start of the year. However, Adan Yabal (Middle Shabelle) experiences extensive road blocks and increased conflict between militia groups and AMISOM backed Somalia national armed forces that recently liberated the town from the insurgents. The stabilized prices in other areas can be attributed to food aid delivered to the affected areas through an organized military convoy (Bulo-Burte); opening up of secondary supply routes (in Hudur through El-Barde) and adjustments made by local traders to bring food to the areas, including through the use of donkey carts and medium sized trucks.

¹ Armed moderate islamic group that controls Dusamareb and Guri'el (often pro-government).

Figure 1: Monthly Population Displacements: January-March 2016 by major reason of displacement



According to UNHCR, between January–March 2016 an estimated 119 503 persons were internally displaced in Somalia, mostly due to eviction (42%) and military offensive (28%) [Figure 1]. Other reasons of displacements included lack of livelihoods (8%), various types of insecurity (3%), etc. (source: <http://data.unhcr.org/horn-of-africa/country.php?id=197>).

AGRICULTURE

According to the results of recent FSNAU assessment conducted in March 2016, a total of 3 700 tonnes of off-season crops, including maize (2 300 tonnes), sorghum (400 tonnes), sesame (900 tonnes) and cowpea (100 tonnes) were harvested in Gedo, Hiran, Middle Shabelle and Lower and Middle Juba regions from late February to early March 2016. Thus, the actual off-season maize production is somewhat lower (by 17%) compared to the projections made during the Deyr 2015/16 assessment. This is attributable to lower harvests in the Juba valley (43% and 25% less in Middle Juba and Lower Juba respectively), Hiran (20% less) and Middle Shabelle (13% less) regions due to early drop of river water levels, dry winds and high temperatures as well as the impact of insect and wild animal damages. Estimates of the Deyr 2015/16 off-season cereal harvest in the above-mentioned regions are summarized in Table 1 below.

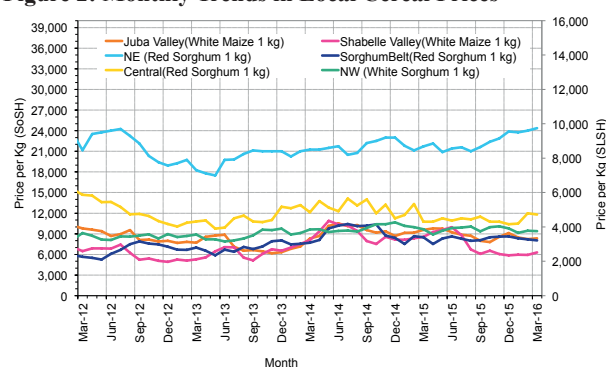
Table 1: Deyr 2015/2016 Maize Off-season Harvest

| Region | Maize | | | Sorghum | | |
|-------------|--------------|----------------|------------|--------------|----------------|------------|
| | Area planted | Area harvested | Production | Area planted | Area harvested | Production |
| Gedo | 2 100 | 1 750 | 1 100 | | | |
| Hiran | 800 | 400 | 250 | 2 000 | 800 | 400 |
| M.Shabelle | 1 000 | 800 | 550 | | | |
| Middle Juba | 550 | 550 | 200 | | | |
| Lower Juba | 300 | 300 | 200 | | | |
| Total | 4 750 | 3 800 | 2 300 | 2 000 | 800 | 400 |

Seasonal Gu 2016 agricultural activities have started from late March in most of the South. The main activities included land preparation, dry planting, ridging for rainwater harvest in agriculture-dependent rural areas of the country. However, farming activities were constrained in riverine areas of Shabelle due to drought conditions in Ethiopian highlands that resulted in severe water shortage in Shabelle River. This situation affected standing fruit and cash crops as well as early irrigation of maize in riverine areas. In agropastoral areas of Northwest (Awdal and W. Galbeed), land preparation activities began at a normal pace with the start of the rainy season. In this livelihood, the crop performed poorly in the last two seasons.

The cereal availability has improved on the markets of most southern regions as a result of to increased supplies from Deyr 2015/16 and off-season harvests. Nevertheless, the cereal prices have shown mixed trends in crop-producing regions of southern Somalia. Between January and March 2016 maize prices have increased in riverine markets of maize-producing regions of Lower Shabelle (by 3%) and Juba (by 14%) following seasonal patterns compounded by *Jilaal* dry season and average Deyr production, with crops harvested in January/February (Figure 2). In March 2016, the lowest maize prices were recorded in Diinsor (3 360 SoSh/kg) and Afgooye (3 750 SoSh/kg), while the highest prices were in Dolow (15 000 SoSh/kg) district of Gedo region. In contrast, the sorghum prices have decreased in Bay (17%) and Hiran (24%) compared to their levels in January 2016, while the prices were relatively stable in Gedo and Bakool. In the Northwest regions, sorghum prices remained mostly stable between January and March 2016 in Awdal, W.Galbeed and Togdheer. In March 2016, the lowest retail price of sorghum was recorded in Diinsor (2 600 SoSh/kg) of Bay region, while the highest prices were in Eyl district of Nugal (28 000 SoSh/kg).

Figure 2: Monthly Trends in Local Cereal Prices



Dried Shabelle River in Beletwein. FSNAU, March 2016

Year-on-year comparisons indicate decrease in maize prices in Shabelle (35%) and Juba (9%) regions due to average Deyr harvests. Similarly, the prices of sorghum were 19, 34 and 26 percent lower in Bay, Hiran and Bakool compared to the previous year (March 2015), respectively.

LIVESTOCK

Pasture, Water and Livestock Migration

As a result of poor rainfall performance in the last season (*Deyr* 2015 and Hays rains), pasture, browse and water continued to deplete in parts of North and Central (NIP livelihood of Bari, Sanaag and Sool regions, Guban Pastoral, Northwest Agropastoral and pockets of West Golis in Awdal and W. Galbeed regions: in the pockets of Hawd Pastoral in Togdheer region: and parts of Coastal Deeh and Addun Pastoral in Central regions). According to field reports, water trucking is on-going since September 2015 in parts of NIP which has not received Deyr rains, while other drought-affected northern regions water-trucking started in February 2016. As a result, water prices in rural markets of Northeast and Northwest regions are 28 and 47 percent higher compared to the levels in March 2015, respectively. In most of the central and southern regions dry pasture, browse and water are available owing to a mild Jilaal season although significant water reduction was observed in River Shabelle. Water volumes have also largely dropped in shallow wells in coastal areas of Mudug (Xaradheere and Hobyo).

Livestock migration in the country is largely concentrated within the traditional dry season grazing areas and close to permanent water sources (rivers and wells). Additionally, the return of livestock in March to NIP, Hawd of Hargeysa and Northwest Agropastoral is reported as they had depleted the pasture in the areas of outmigration (Hawd of Sool, Togdheer and Guban areas of Lughaya District). Livestock from Somali Region of Ethiopia (Shiniile) is still remaining in Guban areas of Awdal waiting for the establishment of Gu 2016 rainfall.

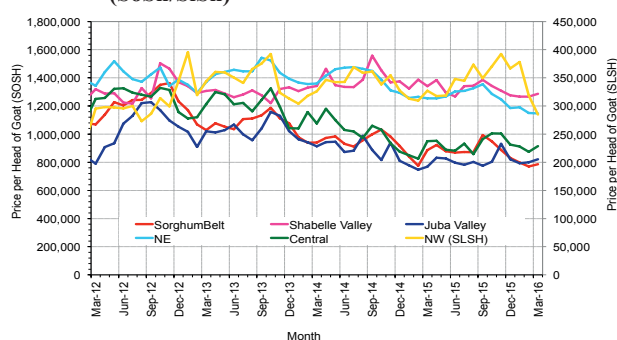
Livestock Conditions, Production and Reproduction

Livestock body condition of all species in central, southern and parts of the northern regions remains average, scoring 3 on 1-5 scale of the Pictorial Evaluation Tool (PET). However, the livestock body condition deteriorated to below average/ poor (PET score of 2 to 1), particularly for lactating animals and their off-springs, in drought-affected livelihoods (see above). Medium kidding and lambing of small ruminants is reported in South/Central regions as well as Hawd and Addun Pastoral livelihoods in the North. The birth is low to none in the drought-affected livelihood zones in the North as a consequence of low conception rates in October to November 2015 and high abortion rates among small ruminants due to poor pasture and water. Livestock death was reported in Guban Pastoral, parts of NIP in Sool, Sanaag and Bari regions. Medium camel and cattle calving rate is expected in the South and Central regions, and Hawd and Addun livelihood zone of North during June-July-August. Milk production continued to decline during Jilaal season due to gradual dissipation of pasture and browse in most of Somalia, while it has completely faded away in drought-affected areas in the North because of low to none calving during the last short rainy season and limited pasture availability over the Jilaal period.

Livestock Trade and Prices

In the first quarter of the year, livestock prices showed mild changes or stable rates in most markets. In South/Central and Northeast of Somalia, goat prices remained stable or increased/decreased mildly (1-5%) in most parts of the country apart from Northwest. In the Northwest markets, a price decline of 25 percent was recorded since January 2016, as a result poor livestock body condition and reduced livestock export demand. The yearly comparison indicates mild to moderate decreases in the local quality goat prices in all markets, including Central (4%), Northeast (9%), Northwest (13%), Shabelle (4%) and the Sorghum Belt (11%). However, goat prices increased in Juba (7%) primarily due to improved Kenya/Somalia cross border trade compared to the last year as a result of relatively improved security conditions (Figure 3).

Figure 3: Regional Trends in Local Quality Goat Prices (SoSh/SLSh)



The local quality cattle prices in southern Somalia recorded mild increases in March 2016 compared to January 2016, following seasonal trends except Hiran where prices declined by 9 percent. The local quality cattle prices are relatively steady in the South compared to a year ago, mostly due to sustained demand and supply in the markets. In the first quarter of the year, 878 507 heads were exported from Berbera (60%) and Bossaso (40%) ports. This figure is 10 percent lower compared to the same time last year, which is attributable to reduced demand from the United Arab Emirates (U.A.E) according to the information from the field.

MARKETS AND TRADE

Exchange Rate Trends

From January to March, the Somali shilling (SoSh) held steady against the U.S. dollar (USD) in most Somali Shilling using markets except in parts of Puntland areas where the Shilling has been losing grounds since late 2015 due to printing of new notes by Puntland Authority. By March, the retail exchange markets in the Northeast markets (Bossaso and Garowe) recorded an average of SoSh 22 175 per U.S. This represents about two and seven percent depreciation of the shilling when compared to the January and same period of last year respectively. The Somaliland shilling (SiSh) in most markets of the Somaliland shilling-using area depreciated compared to both January 2016 (7%) and one year ago (3%).

Cereal Imports and Commodity Price Trends

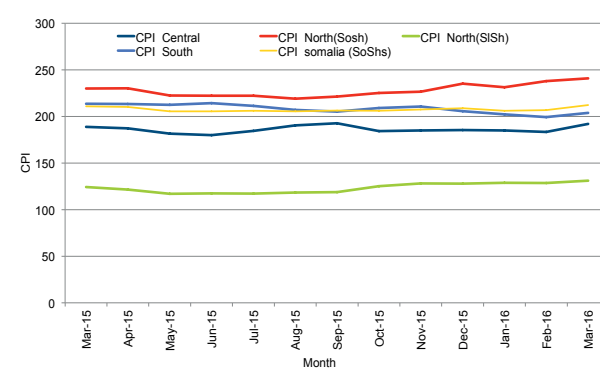
The prices of imported commodities (rice, sugar, wheat flour and vegetable oil) were stable or decreased slightly across most reference markets. This was attributed to stable and or declining world prices, low fuel prices and typical pre-stocking before the April-to-mid September rough seas off the Indian Ocean routes where the monsoon tides curtail sea transport. The average annual price changes from March 2015 indicate that the imported food prices are generally stable or declined moderately in the most regions. However, over reference five-year average, imported commodity price are significantly lower in both the Somali shilling areas and northern Somaliland shilling using areas. Cumulative January to March 2016 exports (1 612 tonnes) of sorghum and maize from Ethiopia to central and northern Somalia increased by 8 percent when compared to January–March 2015 cumulative. The increased flow was attributed to increased demand in the Northwest parts of the country where the Karan season was a failure following poor rains. Some (27 802 tonnes) of the items, mainly sugar, wheat flour and rice imported through the ports of Somalia were re-exported to Ethiopia and Kenya, which was the same when compared to the same period last year due to lower international prices of these commodities and sustained demand from these Kenya and Ethiopia.

The exports of camels, goats, sheep and cattle to Kenya from Somalia increased by 32 percent in the first quarter 2016 when compared to the same period last year but were 16 percent lower than the recent three-year average levels. This is attributed to increased border patrol in the Kenyan Counties of Mandera, Wajir, Garissa and Lamu bordering Somalia because of increased military activity to secure the border.

Consumer Price Index (CPI)

The Consumer Price Index (CPI) for urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), shows relatively stable inflation rates over the first three months of 2016 in SiSh using areas and southern SoSh using areas; it rose by four percent in North-Central SoSh using areas due to increase in red sorghum prices (Figure 4). Over the past one year, the CPI has increased (2-5%) in the consumer markets of the North-Central zones following failed local Karan season and poor integration with southern producer regions. The CPI declined by five percent in the South following above average Deyr production and strong carryover stocks.

Figure 4: Monthly Trends in CPI



NUTRITION

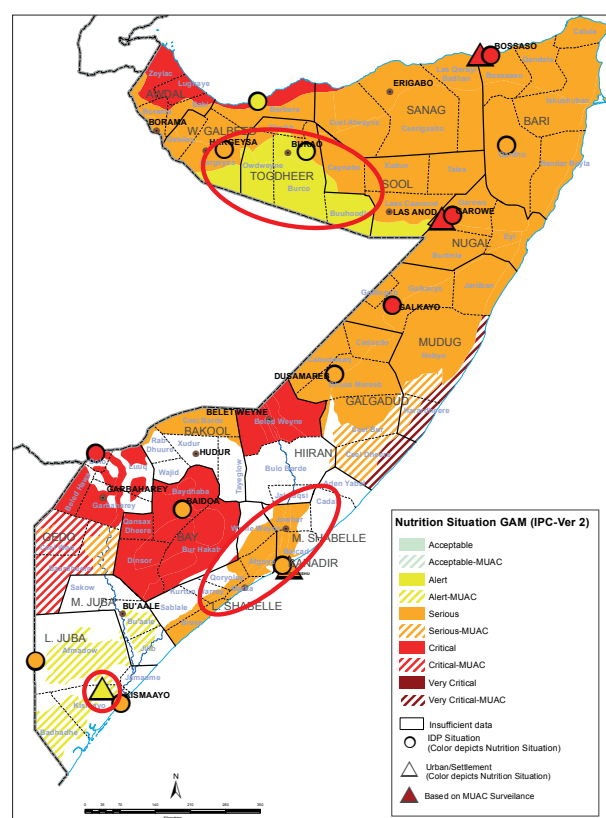
Deyr 2015/16 assessment has identified Bay Agro-pastoral, all livelihoods of Guban Pastoral (Awdal and W. Galbeed Regions), Gedo region (pastoral, Agro-pastoral and Riverine), Beletweyne and Mataban district in Hiran region as well as livelihoods of Coastal Deeh Central as hot spots that require urgent humanitarian interventions. Northwest Agropastoral and NIP livelihoods were also expected to deteriorate to Serious GAM 10-14.9% levels of acute malnutrition (10-14.9%) through the Jilaal period until the next Gu rains are fully established in April 2016.

By late February 2016, the drought impact intensified within the drought affected regions of Guban Pastoral, North West Agropastoral, Togdheer and NIP livelihoods. Consequently, extremely limited milk availability for the households, scarce drinking water source leading to congested water points have spurred diseases such as Acute Water Diarrhea (AWD) and diarrhoea and measles outbreaks in these regions.

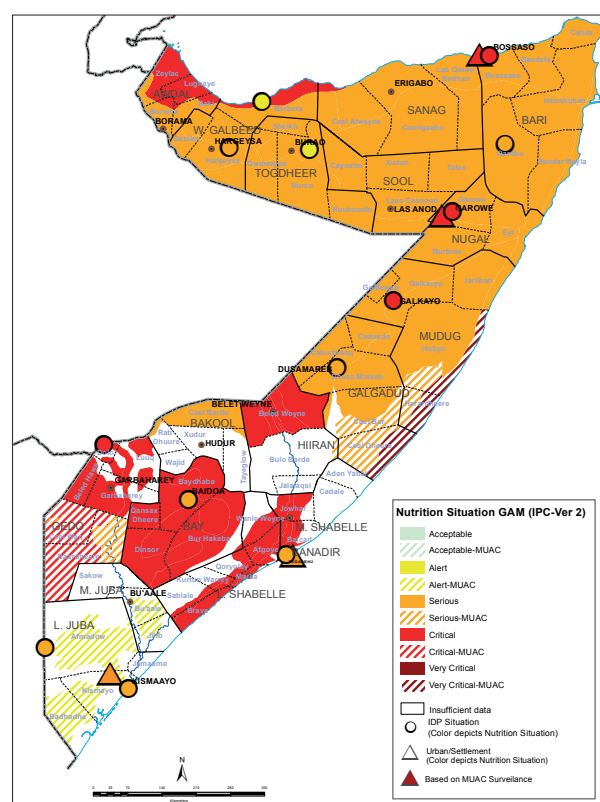
In the southern part of Somalia outbreaks of AWD were reported in parts of Shabelle and Juba regions, during the Jilaal period. Even though Gu rains have started recently and might improve pasture and milk availability in these areas, the riverine livelihoods in Shabelle are exposed to risk of flooding due to expressed increase in river levels

In light of the current drought situation affecting parts of Somaliland and Puntland and impacts of AWD the nutrition outlook has been revised to reflect the deteriorated situation in these areas: Togdheer agropastoral, Hawd of Northwest, Shabelle Riverine, Shabelle Agropastoral and Kismayo urban.

Map 5: Nutrition Situation Projection 2016 (Feb - Apr)



Map 6: Revised Nutrition Situation Projection 2016 (Feb - Apr)



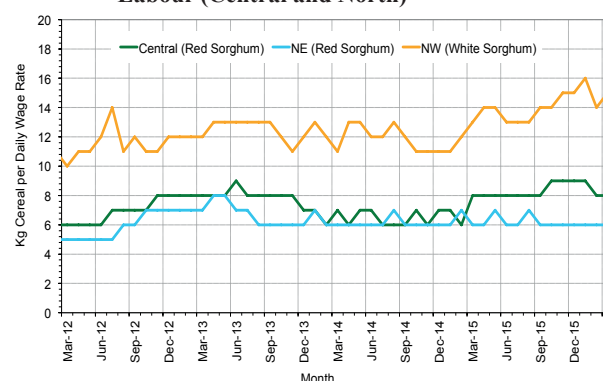
INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The urban food security situation has considerably improved in most parts of the country in the post-*Deyr* 2015-16. Number of urban people classified in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) reduced from the post-*Gu* 2015 estimates by 37 and 76 percent respectively, down to 47 000 and 7 000 people in the post-*Deyr* 2015/16. Additionally, an estimated 2 324 000 urban people were classified as Stressed (IPC Phase 2), the majority of whom (58%) are concentrated in the southern regions. The urban areas in Awdal, Woqooyi Galbeed, Mudug, Middle and Lower Shabelle and Bay Regions were identified in Minimal (IPC Phase 1) food insecurity in the post-*Deyr* 2015/16. Factors that contributed to the urban food security situation in the post-*Deyr* 2015/16 include stable or improved purchasing power of urban people, declined cost of the MEB (CMB), and significantly improved food security situation in most neighbouring rural livelihood.

During the *Jilaal* season (January–March), the CMB has shown mixed trends: it has increased (4-10%) in South-Central regions of Lower Juba, Hiran and Mudug and in northern regions of Sool, Sanaag, Nugaal and Woqooyi Galbeed; declined (5-7%) in Bay and Shabelle regions; and remained relatively stable in the rest of the country. Notably, significant increases in the CMB (9-10%) were recorded in some towns such as Dusamareb of Galgaduud,

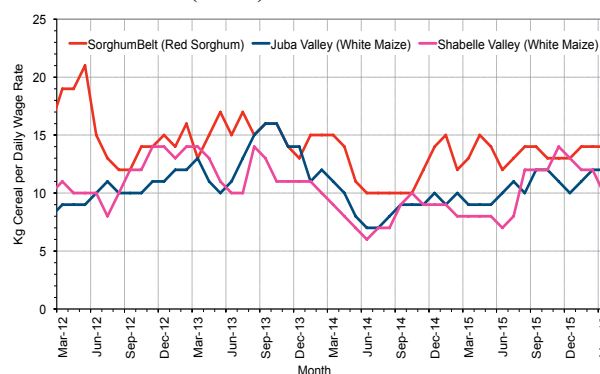
Figure 5: Regional Trend in Terms of Trade Cereal to Labour (Central and North)



Beletweyn of Hiraan and Harardhere of Mudug regions, mainly due to cereal (red sorghum) price increases attributable to recently emerged conflicts in Galgaduud as well as high tensions and sporadic clashes in Hiran and Mudug. Compared to a year ago (March 2015), the CMB increased by 4-10 percent in local currency terms in Hiran and North-Central (Mudug, Woqooyi Galbeed, Awdal, Bari and Nugaal) regions, while it decreased in Banadir, Bay, Bakool, and Shabelle region; the highest decline of 26 percent was noted in Middle Shabelle (Jowhar) due to drop in red sorghum price in Jowhar market compared to one year ago. In the remaining regions the CMB indicated relative stability (1-3% change).

According to FSNAU reference market information across the country, daily casual labour wages remained relatively stable or changed at mild rates (by less than 10%) in most regions of the country in the first quarter of the year. The exceptions are Hiran and Lower Shabelle where the labor wages declined (11-20%) due to sustained clan tensions and political instability (Beletweyn) and diminished urban labour availability (construction, commodity supply, etc.) in most Lower Shabelle districts (Qorioley, Kurtunwarey, Afgoye and Barava), which resulted from repeated fighting coupled with a series of check points on the main roads. The highest labour wage rates (200 000 SoSh/day) were found in Beletthawa and Dolow of Gedo region, Caluula town of Bari region and Kismayo of Lower Juba region. On the other hand, the lowest daily labour wages in March 2016 were noted in Adan-Yabal (30 000 SoSh/day) in Middle Shabelle.

Figure 6: Regional Trend in Terms of Trade Cereal to Labour (South)



Local cereals are available in the most urban markets; hence, cereal prices in most regions changed at mild rates (less than 9%) from January 2016 apart from Hiran and Bay where local cereal (white and red sorghum) prices declined by 11 and 31 percent respectively, owing to increased local supply from the post-*Deyr* 2015/16 production, cross-border trade from Ethiopia (Hiran), and low demand as a result of declined cereal outflow from Bay region, occasioned by increased checkpoints and double taxation from the government and insurgents. Similarly, prices of most of the imported foods (rice, sugar, wheat flour and vegetable oil) changed at mild rates in most regions of the country apart from Middle Shabelle (Adan-Yabal) where the prices of all food imports increased compared to January 2016 due to road blockage and increased conflict between militia groups and the AMISOM.

In the first quarter of 2016, the purchasing power (measured through the terms of trade (ToT) between daily labour wages and cereals) of most market-dependent households remained stable in most regions as per projected trend. Notably, an increase of 9kg/daily labour was recorded in Bay region due to significant decline of red sorghum prices and slight increase in labor wages. The highest ToT between labour to cereal (26kg/daily labour wage) was reported in Banadir and Bay regions, while the lowest was in Central regions (6kg/daily labour wage) [Figures 5 and 6].

RURAL

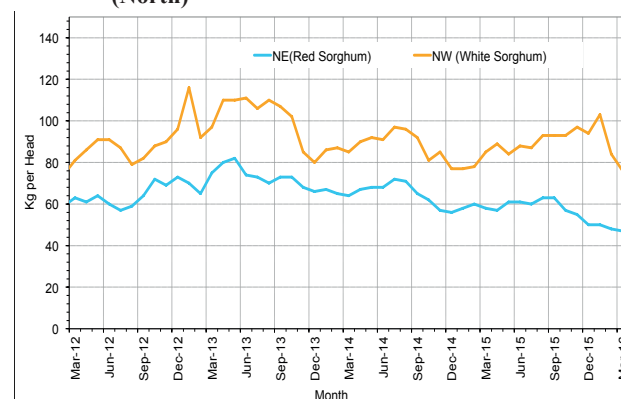
Northern Regions

In the post-*Deyr* 2015/16, the food security situation in livelihoods of Northern regions varied from Minimal (IPC Phase 1) to Crisis (IPC Phase 3). In particular, food insecurity in the Guban Pastoral and Northwest Agropastoral was categorised in **Crisis** (IPC Phase 3), East Golis, Togdheer Agropastoral, Coastal *Deeh* and Northern Inland Pastoral were classified as Stressed (IPC Phase 2), while Hawd, Addun and West Golis were identified as Minimal (IPC Phase 1). The food security categories in most pastoral livelihoods were based on multiple indicators, such as improved own production (milk) in *Deyr* 2015, terms of trade between local quality goat and imported cereal (rice) as well as projections of near average to average *Gu* rains at time of the analysis (January 2016). However, the previously drought affected livelihoods (Guban Pastoral and Northwest Agropastoral) remain in **Crisis** (IPC Phase 2) since July 2015 due to impact of below average to poor rains in the last two seasons (*Gu* 2015 and *Deyr* 2015/16), pressure from livestock in-migration from Ethiopia and Djibouti to Guban (Jan-Feb.'16), significant livestock offtake (high death) and poor or nearly total *Gu*/Karan crop failure in the last two seasons in the agropastoral livelihood.

The prolonged dry *Jilaal* season resulted in significant deterioration of pasture and water conditions, which has prompted an early water trucking (as from February) in *Deyr* rain-deficit areas, particularly in most of the NIP of the northern regions. Between January–February 2016, water prices (20 litre jerry-can) in the rural markets have

increased in the regions of Bari (20%), Sool (25%), Sanaag (42%) and most significantly in Nugal (72%). This has led to an increased household expenditure on water and accumulation of seasonal debt levels. Decline of milk production for consumption and sales is evident in all livelihoods with increased prices compared to a year ago (in the range of 10-25%), deteriorated livestock body to poor conditions (PET Score 1) as reported in Guban Pastoral, parts of NIP and Coastal *Deeh* due to pasture stress. However, livestock condition is average to below average (PET Score 3-2) in the areas that received average *Deyr* 2015 rains. Poor households in agropastoral areas of Northwest regions lack cereal stocks due to poor *Gu/Karan* 2015 cereal production (37% of PET average 2010-2014). This has exacerbated the impact of drought conditions on crop-dependent agro-pastoral livelihood, which experience lack of cereal stocks and high dependence on market for food purchase and limited sources of income over more than a year.

Figure 7: Regional Trend in Terms of Trade Cereal to Goat (North)



In the Northwest regions, *Gu* 2016 rains that started in the first dekad of April relieved water crisis in rain-deficit areas. Humanitarian food aid and water assistance from Arabian Gulf countries, World Food Programme and private sector were distributed to drought-affected areas in the north (NIP, Guban Pastoral and Northwest Agropastoral) to mitigate impact of drought on food security situation to some extent.

In most pastoral livelihoods, medium kidding and low to medium camel calving expected in *Gu* will improve milk production for consumption and sales. The exceptions are Guban Pastoral, which normally does not receive *Gu* rains and NIP livelihood, where calving and kidding rates are expected to be low to none due to drought impact (low conception at the beginning of the season and abortion during *Jilaal*). Livestock prices are expected to increase over the coming months with the start of livestock collection by traders for the upcoming Ramadan period in early June 2016. Increased income from livestock sales is going to improve the purchasing power of the households.



Water Trucking, NIP Livelihood, Qardo. FSNAU March 2016

In the Northwest markets, the local quality goat price declined by 13 and six percent on average from annual and five-year averages respectively, while in the Northeast markets they declined by an average of 9 and 13 percent in the respective periods. This decline of goat price is attributed to over-supply in the markets to cover increased water costs, for partial debt repayments and food purchases. Consequently, the ToT between goat and rice has declined annually by 8-17 percent in the North despite stable price of rice. This has affected the purchasing power of the poor households (Figure 7). Occurrence of livestock endemic diseases combined with pasture stress led to abortion and death of small ruminants in most NIP, parts of Hawd and Addun, which will have a negative impact on seasonal herd growth.

Central Regions

In the post *Deyr* 2015/16, Coastal *Deeh*, Cowpea Belt and Addun of Galgaduud livelihoods of Central regions were classified as Stressed (IPC Phase 2), while Hawd, Addun of Mudug and Southern Inland Pastoral (SIP) livelihoods were categorized as Minimal (IPC Phase 1). This indicated a stable food security situation since *Gu* 2015, which is attributable to increased own production (milk and meat) and favourable purchasing power during post-*Deyr*.

Most livelihoods of Central have experienced mild *Jilaal* season due to average to above average rains received in *Deyr* 2015. However, the rain-deficit areas between Hobyo and Harardhere districts (parts of Addun and Coastal *Deeh* livelihoods) faced water and pasture shortage during the prolonged dry season, which affected livestock condition and milk production. Regardless the water trucking that has been going on in these areas from early February 2016, water prices have either remained stable or showed a mild decline as most of the rural markets (SLIMS) are located at the water points (boreholes).

Local cereal prices indicated increasing trend when compared to a year ago due to high transportation and taxation costs from the producing areas in the South. At the same time, imported cereal prices showed stable to slightly declined pattern over the past 12 months owing to increased supply from Mogadishu and Bossaso ports. Milk availability for consumption and sales has decreased seasonally due to deteriorated pasture condition during the prolonged Jilaal as well as reduced number of milking animals (dried-up). However, camel milk prices have maintained the same levels when compared to the same time last year. Medium kidding of small ruminants and low to medium camel calving expected in Gu will increase milk production and herd sizes, if the *Gu* 2016 rainfall perform well.

In the Cowpea Belt, cowpea stocks of poor households will last up to April 2016 as a result of increased *Deyr* cowpea production (95% of 4-year average 2011-2014). As from May 2016, poor households will rely on cereal purchase. Local quality goat prices were relatively stable compared to a year ago, but they decreased by 17 percent compared to five-year average. Rice price has declined by four percent from annual and by 22 percent from five-year average. As a result, the ToT between local quality goat and rice has increased in both periods (by 2-4%) [Figure 8]. Livestock prices are expected to increase over the coming months with the start of livestock collection by traders for the upcoming Ramadan period as from early June 2016. As a result of increased income from livestock sales, the purchasing power of poor households is expected to strengthen.

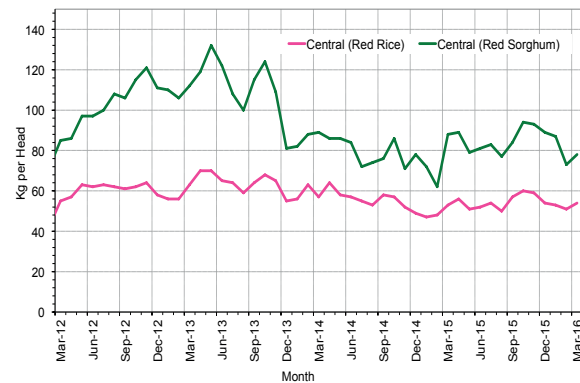
Southern Regions

In the post-*Deyr* 2015/16 (February-June 2016), the food security situation in most rural livelihoods of southern regions is classified as Minimal (IPC Phase 1) with the exception of the livelihoods of Riverine Gravity Irrigation in Middle and Lower Juba and Middle Shabelle regions, Riverine Pump Irrigation in Hiran, Southern Rain-fed Maize, Bay/Bakool Low Potential, Sorghum High Potential in Middle Juba and Coastal *Deeh*, which are classified as Stressed (IPC Phase 2). The projections for IPC classification were based on the assumptions of average/ below average *Gu* rains, normal off-season crop harvest, *Gu* 2016 farming activities, improved livestock production and cereal stock availability at household level in most of the farming areas.

The recent off-season maize crop harvest was somewhat lower (13-43%) than earlier projections (made in January 2016) in the regions of Middle and Lower Juba, Hiran and Middle Shabelle. This resulted from hot and dry winds during February-March, particularly in Middle Juba and Hiran regions. Nevertheless, the off-season maize production has contributed to local cereal availability at the household and market levels. Farmers were relying on cereal stocks from last *Deyr* harvests, although supplies have started running low, as usual for this time of year. Reduced river water levels/ drying up of Shabelle River, the main source of water for riverine communities of Hiran, Middle and Lower Shabelle regions, due to drought in Ethiopian Highlands, have resulted in severe water shortages and a significant two-fold increase in water prices in these regions.

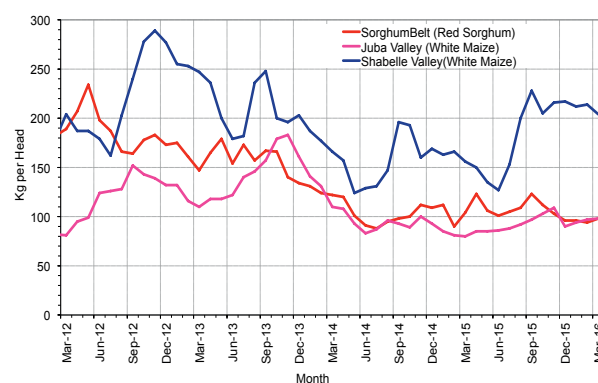
Farm labor demand from January to March 2016 was low in most rural areas during lean season when agricultural activities were limited with exception of the harvesting of cash crops and off-season harvests in riverine areas. However, the demand is expected to improve between April to June, with the effective start of *Gu* seasonal farming activities (land preparation, planting and weeding).

Figure 8: Regional Trend in Terms of Trade Cereal to Goat (Central)



Poor Camel Body Condition. Coastal Deeh, Hobyo District. FSNAU March 2016

Figure 9: Regional Trend in Terms of Trade Cereal to Goat (South)



The FSNAU's recent assessment indicated deteriorated pasture conditions as a result of hot *Jilaal* dry season. Pasture conditions currently are estimated as near to below average in most pastoral livelihoods. However, significant water shortages were reported in parts of agropastoral and pastoral areas of Lower Shabelle, Middle Shabelle, Middle Juba and Hiran region (Hawd livelihood). This situation has led to increased livestock outmigration and worsening of livestock body conditions. Livestock body condition currently is considered average throughout the regions. No reports of severe pests or livestock disease outbreaks were reported. Early rains that precipitated in parts of the South have slightly enhanced pasture conditions and partially replenished water catchments.



Harvested Offseason Maize. Gedo Region, FSNAU, March 2016

Overall agricultural activities in the rural areas have created job opportunities for poor households in riverine and agropastoral areas of southern Somalia. As a result, the purchasing power of poor households measured through ToT between daily labor wage rate and cereals have increased modestly (9%) in March 2016 compared to the previous month in the Sorghum Belt regions. However, the ToT indicated mixed trends in different regions during the last three months (January-March), showing increases in Bay (6%), Gedo (10%) and Hiran (7%), decreases in Shabelle valley (30%), Juba valley (14%), and Bakool (13%) and stable rates in Middle Shabelle. In March 2016, the highest ToT was recorded in Bay (19kg) and Hiran (16kg) regions, while the lowest was in Middle Juba (4kg). In the first quarter of the year, the ToT between local goat and local cereals declined mildly (12%) as a result of livestock price decrease and stable or reduced (Sorghum Belt) cereal prices (Figure 9). However, the ToT decreased in Juba (9%) and Shabelle (11%) regions following seasonal trends. In March 2016, the lowest ToT was recorded in Lower Juba (66Kg/goat) and Middle Juba (82kg/goat) regions, while the highest rates were in major cereal producing regions of Bay (302 kg/goat) and Lower Shabelle (192kg/goat). Compared to a year ago, the ToT between local goat and local cereals have increased in Lower Shabelle (29%), Bay (14%), Juba (10%), Hiran (74%) and Bakool (22%) regions due to stable livestock prices and lower cereal prices as a result of ample supply of cereals and increased roadblocks, which reduced outflow of local cereals to other regions.

Recent publications and releases

- *Consumer Price Index study Report, December 2015*
- *Nutrition Update, November 2015*
- *FSNAU Somalia Cereal Market Integration Report, November 2015*
- *FSNAU Climate Update, March 2016*
- *FSNAU Market Data Update, March 2016*
- *FSNAU Post Deyr 2015/16 Food Security and Nutrition Technical Report, April, 2016*

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

SOMALIA LIVELIHOODS ZONE MAP

