

Climate

Markets

Nutrition

Agriculture

Livestock

Civil Insecurity

Emerging Regional Issues

Integrated Food Security Analysis

This special FSNAU brief provides a summary of the key findings of the post *Gu* 2010 assessment and analysis, which are the result of fieldwork (July 9 – 24), regional and national analysis workshops (July 25 - August 8) and a Technical Verification and Partner Vetting Meetings (Nutrition, August 16 and Food Security, August 18). FEWSNET Somalia along with 84 partners, including regional authorities, UN and international agencies and local and international NGOs participated and supported in this post *Gu* 2010 assessment and analysis process. FSNAU presented these results in Nairobi at a Somalia Support Secretariat Special Meeting on August 20 and issued a Press Release on August 23. The press release and presentation are available on the FSNAU website. (www.fsnau.org)

KEY FINDINGS

The findings of the FSNAU, FEWSNET and partners' post *Gu* 2010 seasonal assessment confirm that the number of people in need of humanitarian assistance in Somalia dropped by 25 percent in the first half of 2010. However, about 27% of the total population **or an estimated 2 million people still remain in need of emergency humanitarian assistance and/or livelihood support until the end of 2010**. The assessment results indicate that improved crop and livestock production, due to favourable seasonal rainfall performance, is the primary reason for the improved food security situation in the country. However, sustained conflict in southern and central parts of Somalia and IDPs' reduced access to aid agencies' assistance - due to insecurity - overshadow these positive developments.

Although Somalia's nutrition situation has slightly improved in the North, 90% of the estimated 35,000 severely malnourished children in the country remain in the conflict-stricken South and Central zones. With **one in six children acutely malnourished** and one in twenty-two severely malnourished in South-Central, nutrition situation remains as one of the worst in the world. With shrinking humanitarian aid and reduced access to basic services, such as health care and clean water, children's capacity to meet their development potential is severely constrained.

Sustained Humanitarian Emergency in Central and Hiran

The epicentre of the humanitarian crisis continues to be in central regions (Mudug and Galgadud) and Hiran due to several seasons of drought and on-going conflicts that have left more than half of the population in crisis. While parts of the pastoral livelihoods of these regions show positive indicators thanks to the average *Gu* rainfall, the agropastoral and riverine areas have suffered from crop failures due to poor seasonal rainfall performance and floods. In addition, large numbers of destitute pastoralists gather in main villages and towns in search of support and/or labour. In order for these populations to recover a combination of expanded lifesaving and livelihood support is required. In addition, some of the highest rates of acute malnutrition reported this season are also found in Central and Hiran.

Receded drought and improvements in parts of the North

The food security situation has improved in most pastoral and agropastoral livelihoods of the North, leading to a reduction of numbers of population in crisis from 14% in post *Deyr* 2009/10 to 10% in post *Gu* 2010. Good seasonal rainfall performance that improved livestock conditions and eliminated acute water shortages is mainly responsible for this positive development. However, Sool Plateau Pastoral of Sanaag region, which had suffered from four seasons of drought, still remains in **HE** due to significantly reduced livestock assets. On the positive side, Togdheer Agropastoral, previously identified in **HE**, has fully recovered from the crisis due to a significant improvement in cereal and cash-crop production.

Internally Displaced Population in Crisis

IDPs who have been forced from their homes due to conflict in recent years continue to be the largest single population group in crisis. The UN estimates provide that 1.41 million people are currently displaced within the country, with 92% of the displacement cases mainly triggered by conflicts. Due to the on-going conflict nearly 300,000 people have become internally displaced since January 2010. Most of the IDPs are concentrated in southern and central Somalia. IDPs' nutritional status is also of great concern, with high rates of chronic malnutrition reported - 1 in 5 children is malnourished - compared to the host population. This compares to 1 in 10 in the host population in northern regions. Comparable rates are reported between IDP and host population in South Central.

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Urban Food Security Crisis

The number of urban population in crisis has significantly decreased in the Post *Gu* due to reduced inflation, increased wages and overall improved food production in the country. However, significant numbers of urban poor still remain in crisis, particularly in South and Central, due to conflict escalation, high numbers of IDPs competing for resources, reduced labour opportunities and soaring cost of living. Out of the total urban population in crisis, an estimated 230,000 people are in **AFLC** and about 80,000 are in **HE**. The urban areas of South and Central have respectively the highest magnitude and intensity of population in crisis.

Bumper Harvest in the South

Current *Gu* cereal production has been exceptionally good across most agricultural livelihoods of the country due to above average and well-distributed *Gu* rains and increased cultivation. The bumper harvest and significantly improved livestock production have led to improvements in most livelihoods of southern regions including Bay, Bakool, Gedo and Lower and Middle Shabelle, as well as in agropastoral areas of Juba regions. However, excessive rains led to floods with devastating impact on the Juba Riverine livelihood where many farmers suffered from considerable damage to the standing crops from early *Gu* planting. This resulted in 55,000 people from Juba Riverine falling into crisis, out of which over 70% are currently in **HE**. However, the total number of rural population in crisis has dropped in the South, from 555,000 in *Deyr* 2009/10 to 395,000 in Post *Gu* 2010.

Table 1: Somalia Integrated Food Security Phase Classification, Population Numbers, July - December, 2010

Region	UNDP 2005 Total Population ¹	UNDP 2005 Urban Population ¹	UNDP 2005 Rural Population ¹	Urban in Acute Food and Livelihood Crisis (AFLC) ²	Rural in Acute Food and Livelihood Crisis (AFLC) ²	Urban in Humanitarian Emergency (HE) ²	Rural Humanitarian Emergency (HE) ²	Total in AFLC and HE as % of Total population
North								
Awdal	305,455	110,942	194,513	0	0	0	0	0
Woqooyi Galbeed	700,345	490,432	209,913	0	0	0	0	0
Togdheer	402,295	123,402	278,893	0	0	0	0	0
Sanaag	270,367	56,079	214,288	20,000	15,000	15,000	15,000	24
Sool	150,277	39,134	111,143	10,000	0	0	0	7
Bari ³	367,638	179,633	202,737	80,000	35,000	0	0	31
Nugaal	145,341	54,749	75,860	15,000	10,000	0	10,000	24
Sub-total	2,341,718	1,054,371	1,287,347	125,000	60,000	15,000	25,000	10
Central								
Mudug	350,099	94,405	255,694	20,000	95,000	0	40,000	44
Galgaduud	330,057	58,977	271,080	10,000	120,000	15,000	50,000	59
Sub-total	680,156	153,382	526,774	30,000	215,000	15,000	90,000	51
South								
Hiraan	329,811	69,113	260,698	20,000	50,000	5,000	130,000	62
Shabelle Dhexe (Middle)	514,901	95,831	419,070	0	40,000	0	5,000	9
Shabelle Hoose (Lower)	850,651	172,714	677,937	10,000	0	10,000	0	2
Bakool	310,627	61,438	249,189	20,000	80,000	5,000	5,000	35
Bay	620,562	126,813	493,749	0	0	0	0	0
Gedo	328,378	81,302	247,076	15,000	25,000	0	5,000	14
Juba Dhexe (Middle)	238,877	54,739	184,138	5,000	10,000	20,000	25,000	25
Juba Hoose (Lower)	385,790	124,682	261,108	5,000	5,000	10,000	15,000	9
Sub-total	3,579,597	786,632	2,792,965	75,000	215,000	50,000	180,000	15
Banadir	901,183	901,183	-	-	-	-	-	0
Grand Total	7,502,654	2,895,568	4,607,086	230,000	485,000	80,000	300,000	15

Assessed and Contingency Population in AFLC and HE	Number affected	% of Total population	Distribution of populations in crisis
Assessed Urban population in AFLC and HE	310,000	4⁷	16%
Assessed Rural population in AFLC and HE	785,000	10⁷	39%
Estimated number of IDPs (UNHCR)	1,410,000⁴	19⁷	-
Adjusted IDP to avoid double counting in Rural IPC	850,000⁵	11⁷	43%
Estimated Rural, Urban and IDP population in crisis	2,000,000⁶	27	100.0%

Notes:

1 Source: Population Estimates by Region/District, UNDP Somalia, August 1, 2005. FSNAU does not round these population estimates as they are the official estimates provided by UNDP

2 Estimated numbers are rounded to the nearest five thousand, based on resident population not considering current or anticipated migration, and are inclusive of population in High Risk of AFLC or HE for purposes of planning

3 Dan Gorayo is included within Bari Region following precedent set in population data prior to UNDP/WHO 2005

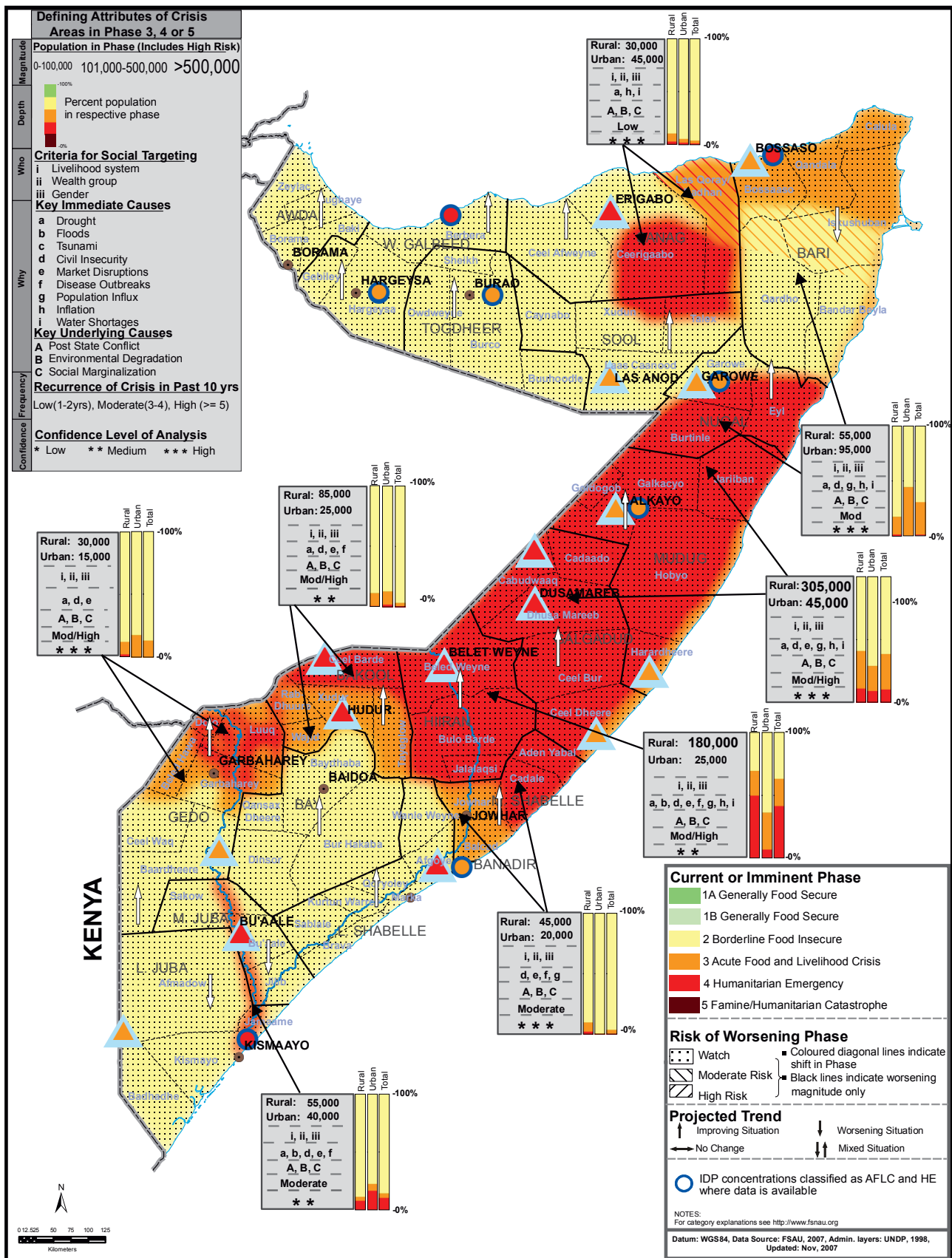
4 Source UN-OCHA/UNHCR: New IDP updated July, 2010 rounded to the nearest 5,000. Total IDP estimates are based on Population Movement Tracking data which is not designed to collect long-term cumulative IDP data

5 Analysis show that 60% of IDP originates from Mogadishu. To avoid double counting, only IDPs originating from Mogadishu are considered in the overall population in crisis. This is because FSNAU does not conduct assessments in Mogadishu and those IDPs from other regions are already considered in the overall IPC analysis. FSNAU does not conduct IDP specific assessments to classify them either in HE or AFLC

6 Actual figure is 1,945,000 rounded to 2,000,000

7 Percent of total population of Somalia estimated at 7,502,654 (UNDP/WHO 2005)

Map 1: Somalia Integrated Food Security Phase Classification, July - December, 2010



SECTOR HIGHLIGHTS

CLIMATE

Rainfall Performance

The *Gu* 2010 rains started in early April in most regions of Somalia, following unseasonal rains at the end of *Jilaal* dry season (February-March). The overall *Gu* rainfall performance was good in terms of intensity, temporal and spatial distribution. Most of the central, northern and southern regions received normal to above normal rains. Pockets in Galgadud, Bari and Sanaag regions received below normal rainfall (Map 2).

The northern pastoral areas of Hawd, Sool Plateau, Gagaab and Nugal valley of Bari, Nugal and Sool regions, which in the past experienced two to four consecutive seasons of poor rainfall, also received well distributed, moderate to heavy *Gu* rains. The rains improved rangeland conditions, alleviated water shortages and replenished most surface water catchments.

In Central, a substantial amount of rainfall (75mm-125 mm) was received in most of the Hawd, Addun and Southern Inland Pastoral livelihood zones of Galgadud, Mudug and Hiran regions, which had previously suffered from five to six failed seasons. A comparison between actual (April-June 2010) and the long-term mean (April-June 1982-2008) rainfall indicates that *Gu* rains were 80 to 140 percent of normal in these areas (Map 2). In contrast, in most areas of the agropastoral and riverine zones of Hiran region, Coastal *Deeh* and pockets of the cowpea growing areas, rains started late and were below normal.

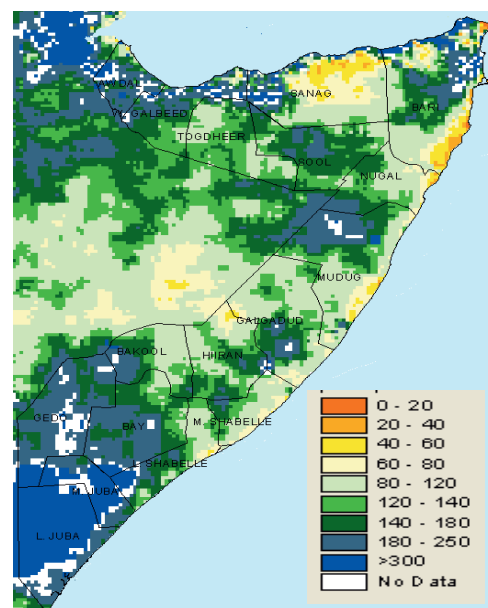
In the southern agricultural regions of Gedo and Bakool, parts of Bay, Shabelle and Juba, the *Gu* 2010 rainfall was exceptionally good. Data from rain gauge stations indicate that key cropping areas received moderate to heavy rains. The rains were beneficial to pasture and water resources, but in upper catchments they led to flooding, causing substantial damage to riverine crops (maize, cowpea and sesame) and temporary displacement, in parts of Juba Valley and Hiran Riverine. According to SWALIM, floods damaged nearly 42,000 ha of farming lands and affected 11,110 households.

Hagaa and *Karan* rains with good coverage and distribution were received in June-July in parts of the South and Northwest. Field reports indicate good *Hagaa* showers in agropastoral livelihoods of Dinsor, Baidoa and Burhakaba districts (Bay region), and good *Karan* rains in Waqoyi Galbeed, Awdal and Togdheer regions of Northwest.

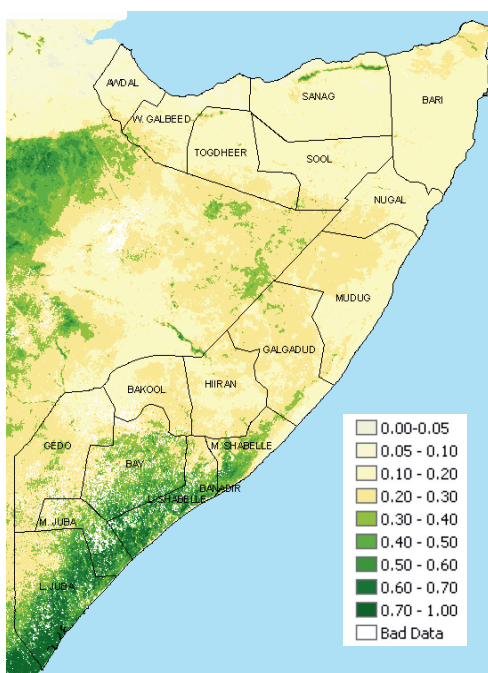
Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) for the last decade of June 2010 shows good vegetation in key agropastoral and pastoral areas of the South, particularly in Juba, Shabelle, Bay, Gedo and mostly parts of Bakool regions. In Central, good vegetation is observed in Hawd pastoral and in parts of Addun and the Cowpea Belt (Map 3). Vegetation conditions are below normal in Coastal *Deeh*, Addun of Jariban district and some parts of the Cowpea Belt. In northern regions, vegetation conditions are good except in parts of the Kakaar-Dharoor Valley, East Golis of Lasqoray (Sanaag) and the Coastal *Deeh* of Northeast regions.

Map 2: Percent of Normal Rainfall
March 1 - June 30, 2010



Map 3: NVDI SPOT End of June, 2010



CIVIL INSECURITY

Civil insecurity and recurrent conflicts continue to affect food and livelihood security in Somalia resulting in human losses, property destruction, trade disruption, displacements and livelihood losses. Southern and central regions are the main hot spots of political conflict in the country, particularly Mogadishu and parts of Galgaduud, Hiran, Bakool and Juba regions. Most recently (July 2010) conflicts have occurred in the North between the Puntland authorities and a new opposing faction in Bossaso areas, as well as between the Somaliland government and a newly formed local faction Sool Sanaag and Cayn (SSC) in Buhodle and Lasanod areas.

In Mogadishu, fighting between the Transitional Federal Government (TFG), supported by African Union Mission for Somalia (AMISOM), and opposing forces, continues to have adverse effects on lives and livelihoods of the population. Sustained displacement from the city is a main issue of concern. Clashes in Puntland, in and around Bossaso, have also resulted in displacement and set off a massive government deportation of nearly 1,000 people from Bossaso town, mostly IDPs (OCHA Access Report, July 2010). Clashes in areas of Buhodle and Lasanod districts during June and July 2010 have also caused deaths, destruction of about 30 houses and displacement of more than 2,000 people from Widhwidh town of Buhodle district (FSNAU Conflict Monitoring, July 2010).

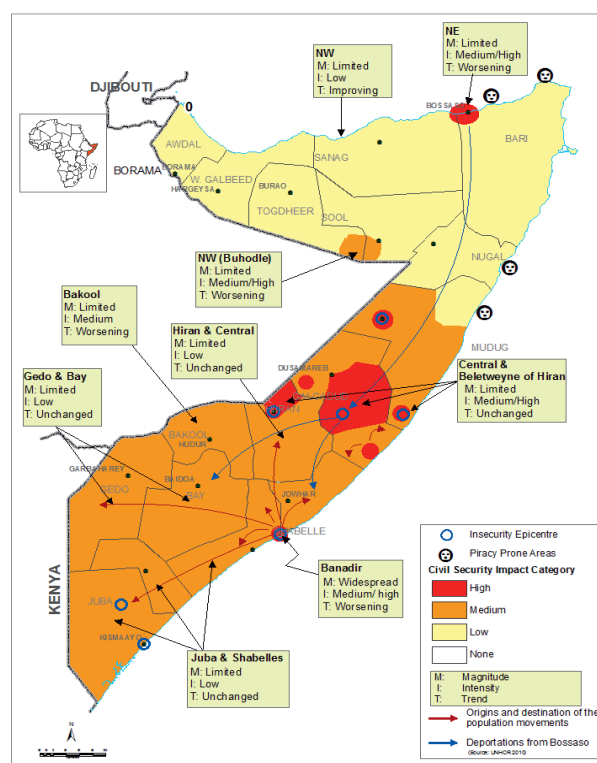
According to the Inter-agency Standing Committee on Population Movement Tracking (IASC PMT) reports, since January 2010 about 283,000 people have become internally displaced. More than 80% of the displacements occurred in southern regions, 64% of which was from Mogadishu. Displacements from central regions accounted for 14% of the total, while only 1% was from the North. Overall, 1.4million people are currently estimated to be displaced within the country, with 92% of the displacement cases mainly triggered by conflicts.

Along with the political conflicts occurring in urban areas in the current year, resource-based conflicts were also reported. They mainly affected pastoral and agropastoral livelihoods in Middle Shabelle (Ceel Muluq of Adale), Lower Shabelle (North Wanlaweyn), Mudug (Bacada weyn of Hobyo district) and Bari (Uurjire and Duudhooyo of Qardho and Iskushuban districts, respectively) regions. These clashes were mainly triggered by claims on grazing and agricultural land ownership and other issues such as revenge. Although some of these conflicts, particularly in the South, have been settled, some areas of Hobyo (Mudug), Qardho and Iskushuban (Bari) still remain under tension. Given the widely available good rangeland resources and limited need for livestock migration, the conflicts have had little impacts on livelihoods.

Sea piracy activities continue off the Somali coast with different implications for both international trade and the local fishing economy. Pirates frequently attacked international vessels; but no incidents with vessels carrying humanitarian supplies were reported in the current year (UN-OCHA Humanitarian Access report, July 2010). However, piracy increasingly undermines local fishing production as well as trade. According to field reports (FSNAU), local fishermen have limited access to fishing out of fear of having their boats hijacked for piracy purposes. Piracy has also affected external demand for sea products from Somalia as trading boats are reluctant to sail along the Somali coastline.

Insecurity also continues to hamper humanitarian operations in the country, particularly in southern and central regions. Although the presence of international humanitarian staff (July 2010) increased since December 2009 from 95 to 199, the number is significantly lower in the southern and central regions due to insecurity. As no peace and reconciliation efforts are currently taking place, political conflicts and violence are anticipated to continue in the current hotspot areas. Mogadishu, Beletweyne, Galgaduud, parts of Juba and Bakool and other areas in the southern and central regions will remain key areas of concern (Map 4). FSNAU will continue close monitoring of the civil security situation in the said areas and assessing its implications on food and livelihood security.

Map 4: Somalia Insecurity Outcomes, Jul - Dec 2010



Source: FSNAU, July, 2010

AGRICULTURE

Current Cereal Production

Current *Gu* cereal production is the best in the last 15 years and exceptionally good across most agricultural livelihoods of the country. The improvement builds on early, above average and well-distributed *Gu* rains; increased cultivation (harvested area is 118% of Post War Average (PWA)) due to displaced people's involvement in farming (Shabelle particularly) and high cereal prices that drove farmers to produce more for own consumption and for sale. However, Cowpea Belt of Central and Hiran region experienced crop failure due to poor *Gu* rains and floods in Hiran riverine. Also, May 2010 floods in Juba riverine significantly damaged 28,000ha of maize (80% of total planting). Never the less, total cereal production in Juba regions is still above average level due to the good harvest from the agropastoral areas.

Total production of major local cereals in southern Somalia is estimated at 190,000MT, which is 37% and 106% higher than the PWA of 1995-2009 and 5-year average (2005 – 2009), respectively (see Table 2 and Figure 1). Sorghum accounts for about half (98,000MT) of the total *Gu* cereal production and maize contributes 48% (92,000MT) without off-season production (8,300MT) expected in Sep-Oct 2010 in Juba regions. Rice represents only 3% (4,500MT) of the total *Gu* production. Current sorghum harvest is 84% higher than *Gu* sorghum PWA while maize harvest is about 107% of *Gu* maize PWA.

Table 2: *Gu* 2010 Cereal Production Estimates in Southern Somalia

Regions	<i>Gu</i> 2010 Production in MT			<i>Gu</i> 2010 as % of <i>Gu</i> 2009	<i>Gu</i> 2010 as % of <i>Gu</i> PWA (1995-2009)	<i>Gu</i> 2010 as % of 5 year average (2005-2009)
	Maize	Sorghum	Total Cereal			
Bakol	400	3,800	4,200	897%	216%	679%
Bay	9,700	64,600	74,300	194%	205%	294%
Gedo	2,900	3,400	6,300	434%	117%	417%
Hiran	100	500	600	89%	19%	54%
Juba Dhexe (Middle)	5,500	6,700	12,200	60%	133%	188%
Juba Hoose (Lower)	4,700	200	4,900	837%	93%	246%
Shabelle Dhexe (Middle)	12,100	9,000	21,100	300%	138%	177%
Shabelle Hoose (Lower)	56,600	9,700	66,300	92%	107%	153%
<i>Gu</i> 2009 Total	92,000	97,900	189,900	134%	137%	206%

The bulk of southern Somalia's cereal harvest (about 85%) was produced by the "grain basket" of Shabelle (46%) and Bay regions (39%). Other cereal-producing regions in the South, except Hiran, had near to above average production in this season. Bay region's contribution to *Gu* 2010 sorghum production (66%) slightly exceeded its average for 1995-2009 (63%), due to good seasonal performance and increased planted area (129% of PWA).

Gu/Karan 2010 cereal production projections in the agropastoral regions of Awdal, Galbeed and Togdheer are estimated at 47,900MT, 81% sorghum (38,800MT) and 19% maize (9,100MT). This is the highest cereal production estimate since 1998 (268% of the PWA). Favourable *Karan* rains in late July-August 2010 may result in an even higher production. FSNAU and its partners will conduct a post *Gu/Karan* 2010 crop harvest assessment in Somaliland in November or early December 2010 to produce final estimates (Figure 2).

Off-season Cereal production

Flooding in Juba and Shabelle river catchments caused considerable damage to crops and other assets, but also provided opportunities for off-season cereal and cash crop cultivation. The projected off-season crop production is 14,000MT (60% maize), of which 71% is expected from Middle Juba (Sakow, Buale and Jilib) and 29% from Lower Juba (Jammame). FSNAU and its partners will conduct an off-season crop assessment in flood recessional cropping areas in September or October 2010 in Juba regions, to confirm the projected off-season crop harvest.

Figure 1: *Gu* Cereal Production (1995-2010)

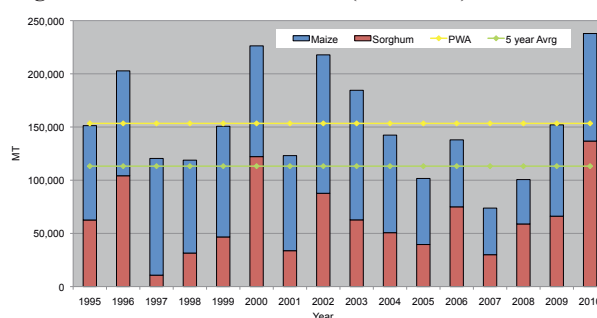
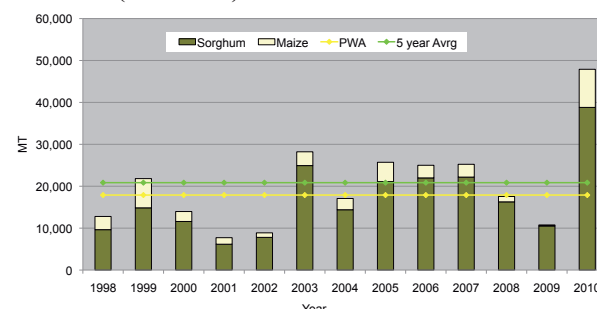


Figure 2: *Gu* Cereal Production (1998-2010) - Somaliland (Northwest)



Annual Cereal Production and Stocks

Gu is the major agricultural season contributing more than 60% to annual cereal production. In this *Gu*, total cereal production (South and Northwest combined), including *Gu* and off-season maize, sorghum and rice, is estimated at 250,600MT, equivalent to 96% of the annual production PWA (*Gu* plus *Deyr*) of Somalia. Southern Somalia accounts for about 81% of the total cereal production of the country estimated at 202,700MT, the second highest *Gu* production in 9 years (Figure 3).

FSNAU assessment results show that rural households in Bay, Shabelle, Middle Juba, Gedo, Bakool and Northwest Agropastoral and a portion of better-off and upper middle wealth groups in Lower Juba have cereal stocks sufficient for 5-10 months. Increased stocks are due to consecutive seasons of good cereal production, including *Deyr* 2009/10 (121% of PWA), *Deyr* 2009/10 off-season, *Gu* 2010 (137% of PWA) and forthcoming *Gu* 2010 off-season harvest.

Cash Crop Productions

Cash crops are an important source of income in riverine and agropastoral areas. Cash crops include sesame, vegetables, fruit (mango, citrus, banana, watermelon), groundnuts, cucumbers, tomatoes, onions, cowpea and fodder. *Gu* 2010 cash crop production, including off-season (sesame and cowpea), is roughly estimated at 65,400MT, 51% higher than the cash crop production estimates of *Deyr* 2009/10 (43,200MT). The regions with largest contributions to total cash crop productions include Waqooyi Galbeed (35%), Bay (17%), Middle Juba (11%) and Middle Shabelle (9%) regions. Watermelon, mostly produced in the Northwest, has the largest share (47%) in the total current *Gu* cash crop production, followed by sesame (19%) and cowpea (11%).

Local Cereal Prices and Terms of Trade

Local cereal (sorghum and maize) prices exhibited a mixed trend in the past 12 months (June 2009 - June 2010). The June 2010 maize and sorghum prices increased in most markets since June 2009 (10–80%) and January 2010 (10-60%). During the same periods, local cereal prices in the Northwest decreased by 15-25% and 25-30%, respectively.

Cereal price levels vary by main markets of southern Somalia. The highest maize prices are recorded in Afmadow (14,000 SoSh/kg) and Hagar (14,500SoSh/kg) of Lower Juba due to their remoteness from main producing districts. These two districts also had the highest maize price increases since June 2009 (56% and 81% respectively) compared to other districts. The lowest maize prices are recorded in main producing districts of Qoryole (6,750SoSh/kg) in Lower Shabelle and Jammame (6,908SoSh/kg) in Lower Juba regions (Figure 4). There is a variation also in sorghum prices among the Sorghum Belt markets. The lowest sorghum price in June 2010 was recorded in high potential sorghum producing districts of Baidoa (5,300 SoSh/kg) and Wanlawayn (5600 SoSh/kg). Conversely, the highest sorghum prices were in Belet Hawa (14,000SoSh/kg) and El Wak (10,000SoSh/kg) of Gedo region and El Berde (10,000SoSh/kg) of Bakool, which is attributable to several consecutive seasons of poor productions in these regions, poor infrastructure and remoteness from main producing areas. Cereal prices are likely to decrease in the coming two to three months in the South and Northwest as the seasonal harvest enters into main markets as indicated by the price dynamics of July 2010, showing a decrease from the previous month (Figure 5).

The terms of trade (ToT) between daily labour wage and cereals showed mixed trends in January–June 2010. The ToT increased in most markets of Northwest and in a few markets of southern Somalia (Afgoye, Wanlawayn, Hudur, Belet Hawa), while it decreased in the rest of the reference markets. The highest ToT in the South was in Belet Hawa (22kg/ daily labour) of Gedo region due to high daily labour wage rate (302,375 SoSh) and decreased sorghum price. Conversely, the lowest ToT is recorded in Hagar (4kg/daily labour), Hudur (5kg/daily labour) and El Berde (6kg/daily labour) due to high sorghum prices and low daily labour wage rates. In the Northwest, the average ToT between daily labour wage and white sorghum ranged from 10 to 18kg/daily labour indicating an increase from June 2009 (71%) and January (33%).

Figure 3: Annual Cereal Production by Season

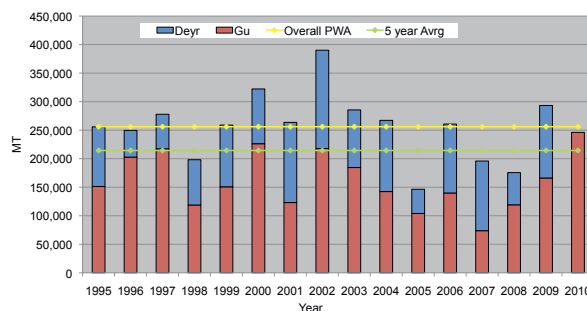


Figure 4: Shabelle and Juba Riverine - Maize Prices

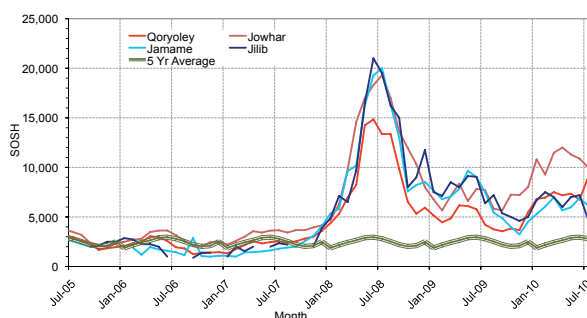
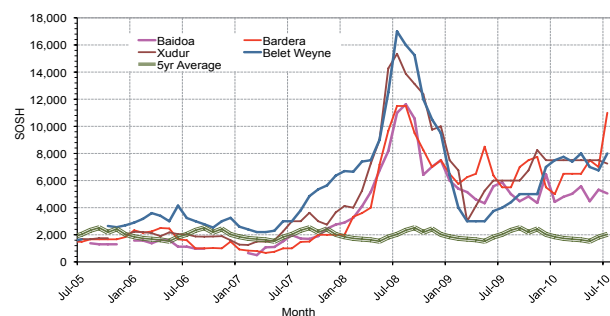


Figure 5: Sorghum Belt, Trends in Sorghum Prices



LIVESTOCK

Rangeland Conditions and Livestock Migration

Rangeland conditions throughout most of the country have significantly improved due to well distributed and above normal *Gu* 2010 rains. Water and pasture availability is average to very good in most parts of the key pastoral areas of the country apart from localized areas of Jalalaqsi (Hiran), Lasqoray (Sanaag), part of north Bari region, Eyl (Nugal), Coastal *Deeh* of Central and Northeast, which received below normal rains. It is important to note that abundant water, pasture and browse will result in a mild *Hagaa* season, normally a cool dry season between July and September. As a result of average to above average *Gu* rains in most pastoral areas of the North, Central and Hiran regions *berkads* are fully replenished with water. Therefore, water trucking - ongoing for more than 3-4 consecutive seasons - has now completely stopped.

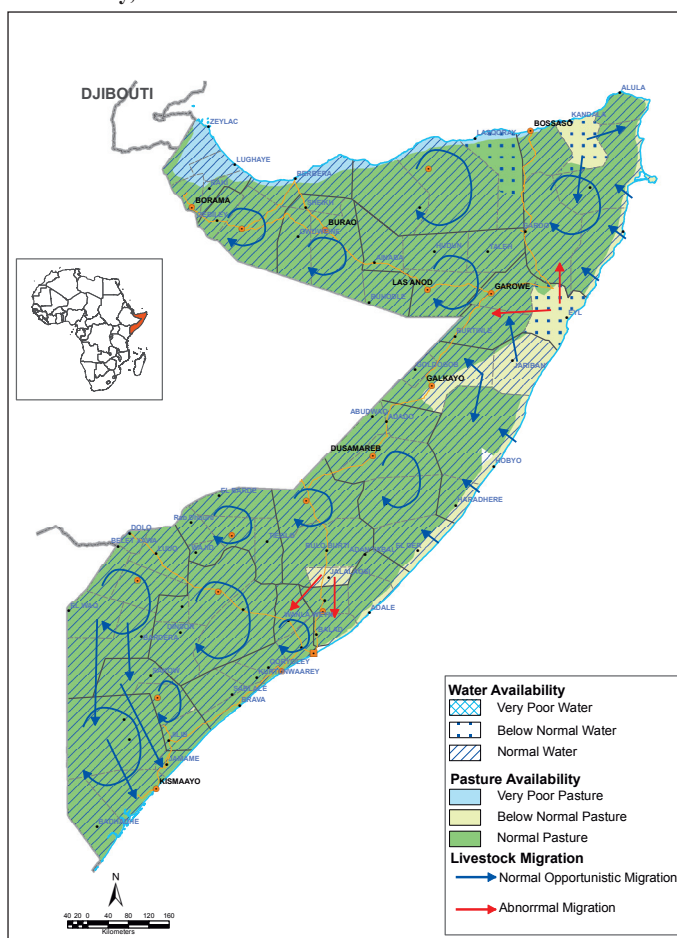
As pasture, browse and water are widely available, livestock migration is minimal in most regions and mostly confined to the traditional wet season grazing areas. Livestock, which migrated from the North in *Gu* 2009 and from Central in *Gu* 2008, have now returned to their home base. FSNAU has observed normal migration in most pastoral areas of northern and central Somalia. Exceptions include pastoralists from areas with poor rainfall such as Eyl (Nugal) and south Jalalaqsi (Hiran) districts who have moved into Northeast and Shabelle regions respectively. Golis/Gabi pastoralists from Qandala district (Bari) and from Coastal *Deeh* of Central and Northeast have moved further inland due to poor pasture availability in these areas (Map 5). No unusual livestock movements across borders have been reported from Ethiopia and Kenya, as rainfall performance in these countries was also reported to be average or above average.

Livestock Body Conditions and Herd Dynamics

Improvement in pasture and water availability resulted in average to above average livestock body conditions throughout the country including in the drought-stricken livelihoods of Galgadud, Mudug, Hiraan and Sanaag regions and in the rain deficit areas of Northern Sool, Northern Bari, Togdheer, Awdal, W. Galbeed and Northern Bakool. Cattle in agropastoral areas of Hiran and Southern Inland Pastoral of Bakool regions have instead only slightly increased body weight and remain in a poor body condition. Therefore, cattle calving as well as conception rates are low in these areas. During *Gu* 2010, camel conception rate was medium to high in most regions of North, Central and Hiran. However, in most of these regions, current camel calving rate is almost low to none due to extremely low conception during the past three to six drought-ridden seasons. In contrast, lambing and kidding rates are medium in Central (Galgadud, Mudug), Northeast, Northwest and Hiran. In the South (Shabelle, Juba, Bay, Bakool and Gedo regions), camel and cattle calving rates as well as lambing and kidding rates are medium with medium to high conception rates.

The FSNAU *Gu* 2010 pastoral herd dynamics model indicates a continued decreasing trend in camel herd size in most pastoral and agropastoral livelihoods of Hiran, Central and North compared to the end of *Deyr* 2009/10 season. Southern Inland Pastoral livelihood zone of Hiran is an exception as it witnessed an (8%) increase in camel herd size for the first time since 2007. However, the highest increase (29%) in camel herd size since December 2009 was observed in West-Golis/Guban pastoral livelihood of Northwest. Conversely, the largest decline in camel herds was found in East-Golis/Gagaab of Bari region (16%) and Coastal *Deeh* (72%) of Central and Northeast, which in the past experienced several consecutive seasonal failures. Camel, sheep and goat herds in other pastoral and agropastoral livelihoods of the North, Central and Hiran decreased at a lower rate in the same period. Conversely, most pastoral livelihoods in the South show an increasing trend in herd size, reaching closer to or slightly above baseline levels.

Map 5: Somalia, Rangeland Conditions and Livestock Migration, July, 2010



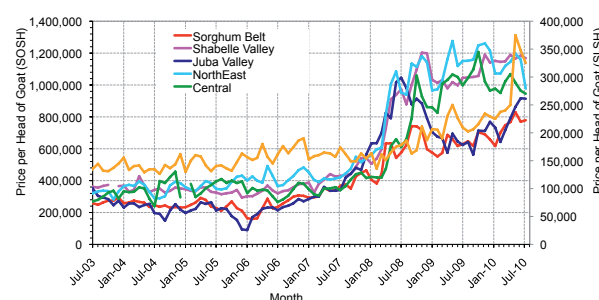
Source: FSNAU, July, 2010

Specifically, in Southern Inland Pastoral livelihood and Dawa Pastoral of Gedo, camel populations reached the baseline levels. Similarly, cattle and sheep/goats population in Southeast Pastoral of Juba reached baseline levels for the first time since the 2005 drought. However, cattle, sheep and goat holdings are significantly below baseline levels in all other livelihoods in the South. No outbreaks of major livestock diseases were reported. However, a widespread unidentified disease known as “*Kudunkuudshe*” is affecting small ruminants in the Northern regions, without causing high mortality, but affecting animals’ body weight.

Livestock Prices and Pastoral Purchasing Power

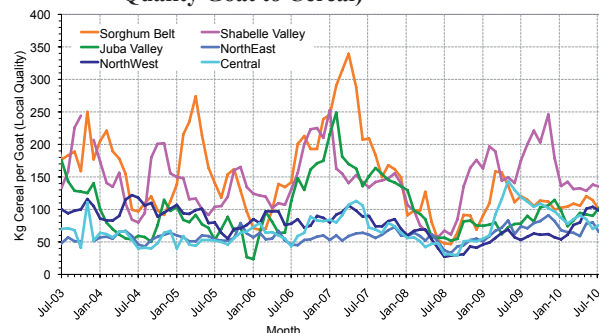
Livestock prices exhibited mixed trends in the first half of 2010. For example, in the regions of Shabelle, Juba, and Sorghum Belt camel prices have increased by 3-21% since December 2009, while in Northeast, Northwest and Central they have decreased by 9-21%. Similarly, local quality cattle prices have increased in the first half of the year in Sorghum Belt (23%), Juba (7%), Northeast (1%) and Central (3%) but remained unchanged in Northwest and Shabelle regions. Local quality goat prices have increased in most markets of the country with the exception of Northeast, where they have slightly decreased (Figure 6). On the other hand, export quality goats prices in June 2010 were higher in Northeast (4%) and Northwest (15%) compared to December 2009 prices, while they remained relatively stable in Central. Increased livestock prices are due to the improved body condition, increased demand for restocking due to improved pasture and water availability and accessibility and the stabilization of the Somali Shilling in 2010. Other factors that contributed to price increases include more demand for livestock during Ramadan, stocking for the coming Hajj and improved livestock trade from Somalia to Saudi Arabia and United Arab Emirates.

Figure 6: Regional Trend in Local Quality Goat Prices (SoSh/SISh)



Decreased cereal price (rice) and increased livestock prices led to improving rural households’ purchasing power, measured through ToT between local quality goat and cereals, particularly in central and northern regions (Figure 7). The largest increase in ToT (47%) between local goat and cereal (56 Kg rice/head) was recorded in the Northwest, which had the highest increment in local quality goat price since December 2009 compared to other regions. In the South, though maize prices in Juba and Shabelle regions have increased by 29% and 4% respectively, ToT between goat and cereal (maize) has remained unchanged since December 2009, due to increased goat prices in these regions. ToT has also increased in the markets of Sorghum Belt, with a particular high increase observed in Beletweyne (77%), the main transit market for livestock exports (from South to Berbera and Bossaso ports).

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



Livestock Exports

Normal to above normal *Gu* rainfall in most of the country and Kenya’s northeastern province has further improved cross border cattle trade in southern Somalia. Pasture and water availability have improved along the cattle trekking routes and ground holdings in areas surrounding Kenya’s main consumer markets, increasing carrying capacity. Demand at Garissa cattle market also remains constant.

The volume of livestock exports through Berbera and Bossaso ports in the first six months of 2010 (1,087,353 heads) was 33% higher than same period of last year (January–June 2009) and exceeded first six months 5-year average (2005 – 2009) by 22%. Household access to export quality goats improved in the drought-affected and rain deficit regions of Central, Northern and Hiran with the exception of Sool Plateau of Sanaag region where poor households have no access to export quality animals. The five abattoirs in Galkacyo, Beletweyne and Burao have not operated since October 2009. Only Burao abattoir has restarted its operations since July 2010 with recorded exports of 1,400 heads.

MARKETS

Exchange rates

The Somali Shilling (SoSh) has been relatively stable since June last year, showing only marginal devaluation against the US Dollar in the first half of 2010. In particular, the SoSh in Mogadishu's main Bakaara market was traded at an average of 32,250 against the US Dollar in June 2010, indicating about 1% decrease in value since January this year (31,850 SoSh/USD); similar marginal decreases (1-2%) were reported in the other main markets of the SoSh areas. The slight depreciation since early this year is mainly due to a volatile market environment as a result of increased insecurity and reduced foreign exchange earnings from piracy activities. Piracy earnings have decreased due to increased patrolling by joint international naval forces and seasonal rough seas that have restrained piracy activities.

On the other hand, the Somaliland Shilling (SiSh) has appreciated by about 5 percent from one year ago (June '09) and was relatively stable in the first half of 2010. In June this year, the currency was quoted at approximately 6,700 in Hargeisa market. This rate is also comparable with the June five-year average (2003-2007) (Figure 8).

Import Commodity Prices

During the first six months of 2010, the prices of imported commodities such as diesel and rice have shown mixed trends in the main markets of the country. For instance, rice prices decreased in the main markets of Juba valley (6%), Sorghum Belt (6%), Central (5%) and Northwest (4%), while increased in Northeast and Shabelle valley markets by 9% and 14% respectively. Diesel prices increased across most main markets of Somalia (8-20%) with the highest increase observed in Shabelle regions, particularly due to high demand from mechanized agricultural activities. Prices of other imported food commodities monitored in Somalia such as wheat flour, sugar and vegetable oil remained relatively stable in most reference markets of the country. Seasonal rough seas and increased demand during Ramadan have placed an upward pressure on prices during July 2010 (Figure 2) and the trend is projected to continue at least up to the end of September (Figure 8).

Urban Poor Cost of Living

The Inflation levels, measured by the consumer price index (CPI) of the minimum expenditure basket (MEB), are still high throughout the country compared to the reference year (March 2007). In particular, high inflation (85-157%) is observed in the SoSh areas of South, Central and North, while it is moderate (16%) in the SiSh areas in the Northwest. In January-June 2010, inflation again showed a moderate increase in South (8%) and Central (7%), while it significantly dropped in Northeast (13%) and only moderately in Northwest (5%) (Figure 10).

In the first half of 2010 the MEB cost has decreased in the Northwest (5%) and Northeast (13%), due to lower prices of cereals (sorghum) and other commodities during the first half of the year. However, the average MEB cost increased by 7% and 8% in the central and southern regions respectively, mainly due to the increase in sorghum prices which represents a large proportion (30-40%) of the minimum food basket for urban areas.

Figure 8: Monthly Exchange Rates - SoSh and SiSh to USD

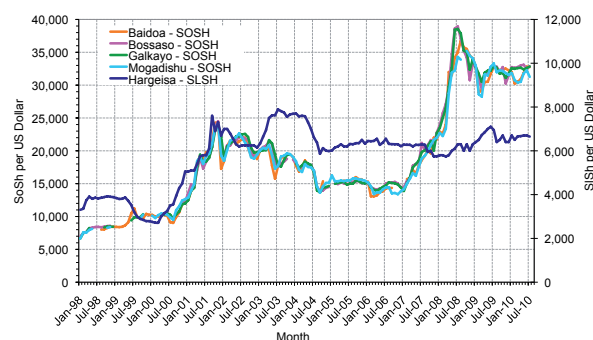


Figure 9: Shabelle Valley- Trend in Imported Commodity Prices compared to Exchange Rate

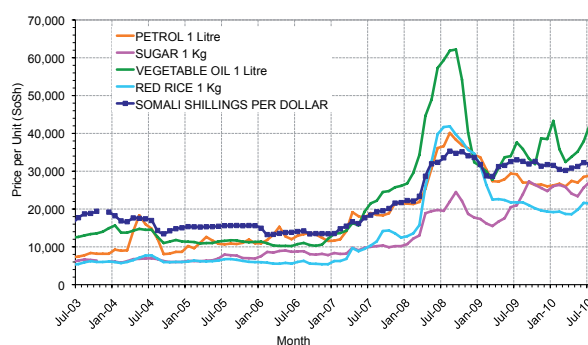
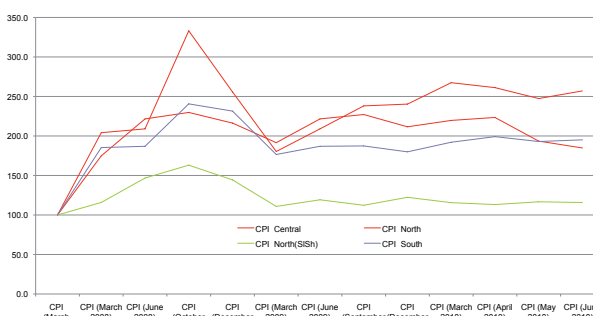


Figure 10: Regional CPI Trends



NUTRITION SITUATION

The nutrition situation shows a varied picture throughout the country, with improvements in northern areas yet a sustained crisis in South-Central (Map 6 and 7).

From April to July 2010, FSNAU and partners conducted a total of 25 representative nutrition surveys. Of these, 8 reported rates of global acute malnutrition (GAM) <10%, 7 reported rates in the 10-15% range, 7 reported rates in the 15-20% range, with the remaining 3 reporting rates >20%. The median national rate of global acute malnutrition (GAM) is **15.2%**, and 2.4% for severe acute malnutrition (SAM). This translates to an estimated **230,000 acutely malnourished children, of whom 35,000 are severely malnourished, representing 1 in 7 and 1 in 42, of all children under 5 years in Somalia.** These national rates have indicated a slight reduction from the *Deyr* 2009/10 six months ago, when 16% GAM and 4.2% SAM were reported, attributed mostly to improvements in the North as well as Shabelle and Juba regions in the South.

For South and Central regions, the areas most affected by insecurity and limited humanitarian space; median rates are at **16.6% GAM and 4.5% SAM**, translating into a caseload estimate of **90% of all the severely malnourished children in Somalia.** These rates indicate a slight improvement in the GAM from 6 months ago, when median rates were at 19% GAM, with no change in the rate of SAM.

Milk access remains a key driving factor in the nutrition situation among northern pastoralists subject to livestock migration dynamics, which is illustrated in the seasonality in the rates of acute malnutrition amongst this group. However in the areas of South and Central, there are many more factors directly affecting elevated rates of acute malnutrition, including food insecurity caused by natural disasters such as drought and flooding and also economic factors such as increasing food prices, morbidity levels including outbreaks and sub optimal infant and young child feeding practices. For IDPs seasonality also is an issue in terms of access to labour opportunities e.g. port activities and disease.

Civil insecurity in Mogadishu, Hiran and parts of Central regions of Somalia leading to on-going population displacements, the *Gu* 2010 rainfall failure in Hiran, coastal parts of Central regions have the aftermaths of the cyclone in the Northeast also contribute to the current analysis. Access to health services is of great concern with many carers, opting instead for damaging and sometimes dangerous alternatives to conventional health care through traditional means (*See photo*). Therefore, a concerted effort to address all these factors, in addition to enhancing household food security and livelihoods, remains crucial for sustainable improvements in the nutrition situation to be realized.

A summary of the key findings are presented in below, with detailed analysis by region and livelihood within the upcoming **Post Gu Nutrition Technical Series**, due mid September 2010.

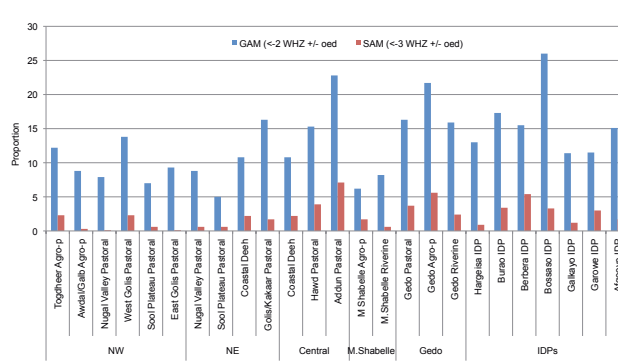
South and Central regions: The nutrition situation shows a varied picture in different parts of South and Central. There has been significant improvement in parts of Shabelle attributed mainly to a bumper crop harvest, which provided labor opportunities for poor households and increased access to milk following in-migration of livestock. Similarly in Juba and Gedo pastoralists, the nutrition situation has improved with increased access to milk and livestock products following favourable *Gu* 2010 rains which improved livestock body conditions and kidding rates. Though acute watery diarrhea was again reported this season in Shabelle and Juba regions, which maintained nutrition rates at **Serious** levels.

The sustained nutrition crisis in the other livelihoods of South and Central Somalia, currently classified in **Critical** or **Very Critical** nutrition phases continues to highlight the impact of years of civil war on the population's ability to deal with shocks. The widespread lack of access to appropriate health service, safe water and improved sanitation further increase the risk of disease, and many common childhood illness can be fatal. In spite of this year being a bumper harvest in Bay region for example, it has yet to translate into improved nutritional status as children are fed predominantly on cereal and oil based diet, missing the essential micronutrients and proteins essential for health, growth and development. As mentioned earlier, the highest levels of acute malnutrition are reported in South-Central at 16.4% GAM and 4.5% SAM compared to the national rate of 15.2% GAM and 2.4% SAM. Further, the very high stunting of 22 % in the South and Central, unchanged from 6 months yet compared to the 8% and 12% reported in the Northwest and Northeast respectively, continues to illustrate the chronic nature of this crisis. Currently, with the reducing humanitarian space, access to nutritional rehabilitation services is also a limiting factor to recovery and the nutrition situation here remains in crisis with a poor outlook for the coming months.

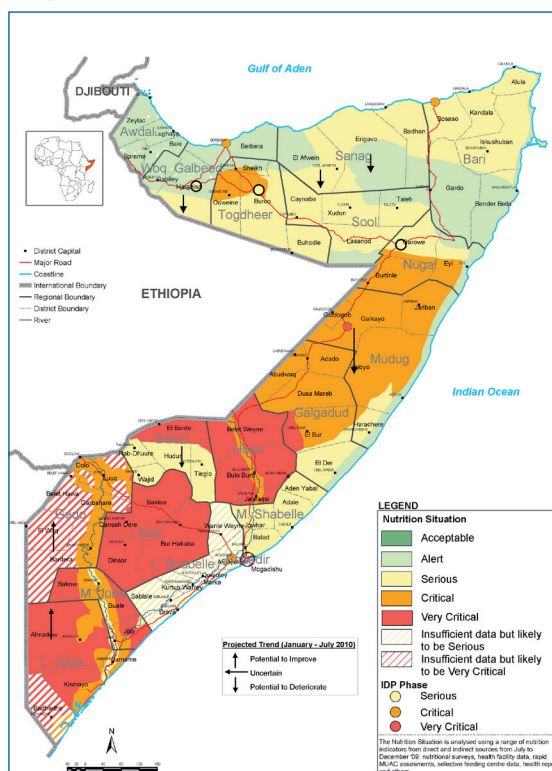


A child with wounds from cuts and burns, a practice to treat abdominal illnesses. FSNAU-Huddur, July 2010.

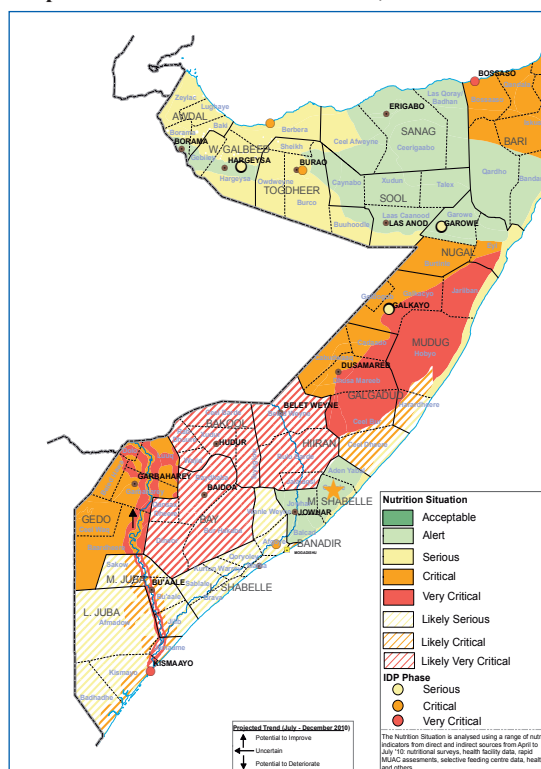
Figure 11: Global Acute and Severe Acute Malnutrition Gu (April-July) 2010 WHO GS<-2 WHZ & <-3 WHZ and/or Oedema



Map 6: Nutrition Situation Estimates, Post Deyr '09/10



Map 7: Nutrition Situation Estimates, Post Gu '10



Northern regions

In the Northwest, there is a mixed picture with notable recovery to **Alert** from the previous **Serious** situation in the East Golis Guban and Nugal Valley, and to **Serious** from **Critical** in the Togdheer agropastoralists, mainly as a result of in migration of livestock and subsequent increased access to milk. Humanitarian support has also improved since July 2009. The Hawd pastoralists in the Northwest are in a sustained **Serious** nutrition phase, attributed mainly to limited access to milk availability as a result of low calving in camels, sheep and goats. Given the population density, even without **Critical** or **Very Critical** rates of acute malnutrition, 21% of all acutely malnourished Somali children reside in the Northwest, therefore integrated efforts to meet their needs are key.

In the Northeast, analysis of the nutrition situation is also providing a mixed picture since January 2010. Improvements to **Alert** rates of acute malnutrition are now being reported in Nugal Valley, from **Serious** in the January 2010, with a sustained **Alert** phase in Sool Plateau. In the East Golis, Guban and Karkaar, the situation has deteriorated to **Critical** from **Serious** in January 2010. Sustained **Critical** rates in the Hawd and deterioration from **Critical** to **Very Critical** in the Addun highlight a concerning nutrition situation in the Northeast and elevated needs. It is estimated that 3% (excluding the IDPs in the region, also at 3%) of all acutely malnourished children in Somalia reside in the northeast regions.

IDPs

IDPs continue to be a nutritionally vulnerable group, even in areas of relative peace and improved access in the northern regions. The **median GAM rate at 15.3% and SAM rate of 3.2%** are slightly higher than the national rates of 15.2% and SAM rate of 2.4%. However, the median rates of global acute malnutrition in the IDPs have shown some improvement from the 16.7% GAM and 5.0% SAM reported during the *Deyr* 2009/10. This is mostly due to improvement in the nutrition situation to **Serious** in Galkahyo IDPs with a **GAM rate >11.3%** and a **SAM rate > 1.2%**, from the *Deyr* 2009/10 which showed unacceptably high GAM rate at 23.7% and SAM rate at 6.3%. Similarly, in Garowe IDPs, the situation is **Serious** with GAM rates of 11.5%. The stunting level at **19.4%**, show a slight improvement compared to the *Deyr* 2009/10 median rate of 24.8%, and is similar to the national rate of 18.4%. Nevertheless these levels indicate that **1 in 5 IDP children will not be able to reach their full developmental potential**. The window of opportunity for reversal of stunting is up to 2 years, so efforts focused on integrated health and nutrition programmes are key for these children. Of note also is the situation in the Afgoye IDPs which has remained stable with GAM rate of 15.1% and SAM rate of 1.7% compared to the situation in January 2010 where GAM and SAM of 15.9% and 5.5% respectively were reported, despite the shrinking humanitarian space.

The high levels of nutritional vulnerability is likely to persist in most parts of South and Central, based on the highlighted aggravating factors, coupled with the prevailing insecurity which limits humanitarian access, and projected below average rains in the coming season, which could limit access to milk and impact on agricultural production. Improved humanitarian access that will ensure a combination of emergency nutrition interventions, adequate integrated humanitarian response and capacity strengthening of current and new nutrition stakeholders remains key in addressing these issues.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The FSNAU urban assessment (July 2010) and market monitoring data points to improved food access in most urban areas of the country due to reduced inflation, increased wages and overall improved food production. However, significant numbers of urban population, especially in South and Central, are still in a food security crisis. The number of urban population in crisis is currently estimated at 310,000 people, a decrease from 580,000 in *Deyr* 2009/10 (Map 8). Out of the total persons currently in crisis, 230,000 are in **AFLC** while 80,000 are in **HE**. Central regions have the highest proportion (29%) of urban population in crisis, while the largest numbers of urban poor in crisis are in the South (125,000).

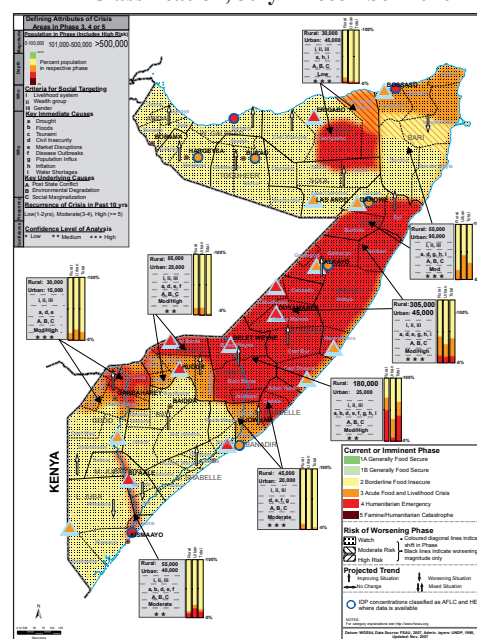
Despite the overall improved food access in urban areas of Somalia, large numbers of urban poor still struggle to meet their basic food needs. This situation is due to escalated conflicts, high numbers of IDPs competing for resources, declined labour opportunities and price increases in some areas. Particularly, the cost of living is increasing in South and Central due to moderate increases in inflation rates (see Market Sector) suppressing purchasing power of urban poor and IDPs and, consequently, their access to food. Between December 2009 and June 2010, the cost of MEB has increased in eight out of twenty-four assessed towns, specifically in Central (Abudwaq, Eldher, Harardhere) and South (Kismayo, Buale, Dhobley of Juba and Bardera of Gedo) with the highest increase in Juba regions (60-77%). Conversely, the cost of MEB dropped by 8% to 25% or remained stable in the other assessed urban areas. The highest cost of MEB in June 2010 is noted in Central, ranging between 4,000,000-5,000,000 SoSh. The main reasons behind the high MEB cost in Central are remoteness from main food production areas and main ports, which translate into high transport costs, as well as disruptions in commodity movements because of recurrent conflicts in these areas. Conversely, in the cereal producing southern regions the MEB cost (1,300,000-2,200,000 SoSh) is the lowest compared to the other regions.

Urban poor's purchasing power, measured by ToT between daily labour wage and cereals, showed mixed trends across urban zones in the first six months of the year. In the South, the ToT decreased (12-44%) in Baidoa and Dinsor (Bay), Buale and Kismayo (Juba), Beletweyne (Hiran) and Bardera (Gedo). The decline is attributed to mainly two factors. One factor is the increase in cereal prices, particularly in Baidoa, Dinsor, Buale, Dhobley and Kismayo. Another one is decreased wage rates (11-22%) due to low access to agricultural labour (Beletweyne and Buale), low trade activities (Bardhere and Dhobley) and low port activities (Kismayo). However, anticipated cereal price decrease due to good crop harvests, is likely to boost the ToT, particularly in the producing areas of the South. In Central, ToT (labour usage to rice) indicated some improvement in January - June 2010 due to decline in rice price and some increase in labour wage rates. However, in Elder and Harardhere, where sorghum is the main staple food, the ToT (labour to sorghum) decreased by 11% and 9% respectively, due to sorghum price increase. In the North SiSh zone between January-June 2010, the ToT (labour to rice) increased by 14% in Borama but remained stable in Hargeisa. In the North SoSh areas, the ToT (labour to rice) declined by 20% in Bossaso while remaining stable in Erigabo and Lasanod.

According to the assessment results, poor households in most of the assessed towns were able to meet the cost of the MEB. The exceptions are the urban poor in Central (Dhusamareb, Abudwaq, Eldher and Galkayo), Buale (Lower Juba) and Erigabo (Sanaag), which had average expenditure gaps of 30%, 24% and 8%, respectively. Poor households' access to social support, which expands food access, was generally minimal and followed seasonal trends. The average contribution of social support to overall income accounted for 13% in Central, 10-22% in the South and 10-30% in the North. Urban households with expenditure gaps spent a high proportion of their income on food that shows a difficulty in accessing it. High share of food in households' expenditures was also observed in Afgoye, which accommodates large numbers of IDPs, and in some towns of Bakool region (Hudur and Elbarde) where civil insecurity and low economic activities prevail. It was found that in these towns the ratio of food to total expenditures of poor households was 8-22% higher than the ratio of food in the total MEB cost. In other words, these households have little to spend on essential non-food commodities and basic services.

The integrated analysis of the nutrition findings indicates a concerning situation in the Somali urban poor settlements, ranging from **Alert** to **Very Critical**. In Hiran, Bay and Bakool where the nutrition situation is classified as **Very Critical**, the findings are consistent with those of adjacent rural livelihood zones. In Juba and Shabelle the nutrition situation in all the urban centers is **Critical** to **Very Critical**, apart from Dohley with **Serious**. Urban centers in Central regions are faced with **Alert** (Abudwaq only) to **Serious** nutrition situation, with the exception of Eldhere which is in **Very Critical** phase. In the north, the nutrition situation shows a mixed picture ranging from **Alert** in Garowe to **Very Critical** in Hargeisa and Burao.

Map 8: Somalia Integrated Food Security Phase Classification, July - December 2010

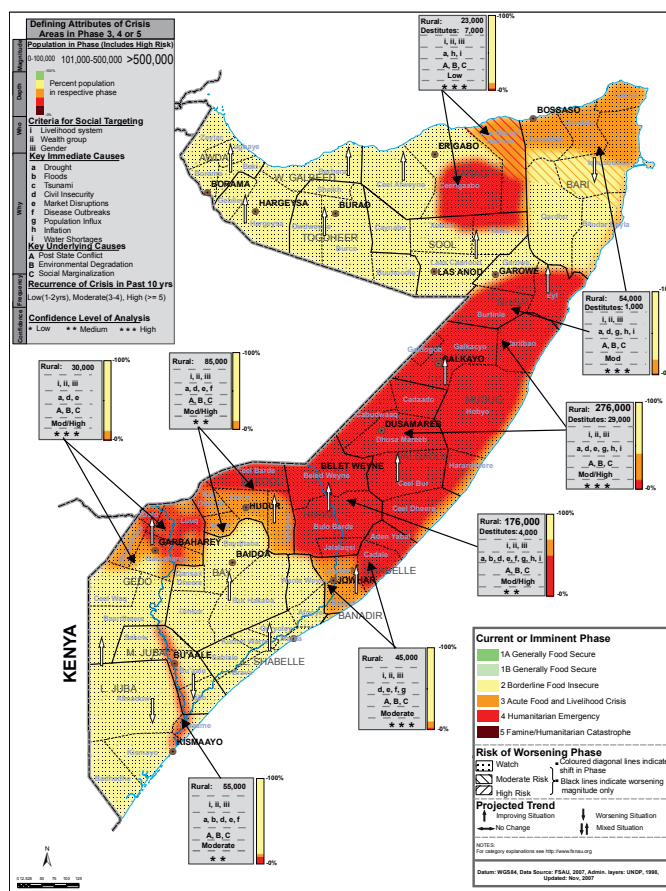


Triangles Indicate Urban Areas in AFLC and HE

RURAL

The results of post *Gu* 2010 livelihood based integrated food security analysis show that currently 785,000 rural people in Somalia are in an acute humanitarian crisis, which represent a 37% reduction from the post *Deyr* 2009/10 numbers. The improvement is mostly due to good seasonal performance, which boosted food and livestock production in the country. Currently, an estimated 300,000 rural people still remain in **Humanitarian Emergency (HE)** while 485,000 are in **Acute Food and Livelihood Crisis (AFLC)**. Despite a significant reduction (22%) in the numbers of population in crisis in rural Galgaduud, Mudug and Hiran, these regions continue to be the epicenter of crisis with over half of the rural population being either in **AFLC** or in **HE**. There is a significant deterioration in the food security situation in riverine areas of Juba regions, due to the May 2010 floods, which damaged standing crops and resulted in 55,000 people falling into crisis, of whom over 70% are currently in **HE**. The deterioration is also observed in the entire fishing and parts of pastoral livelihoods of the Northeast, as a result of sea piracy constraining fishing activities, two consecutive seasons of below normal rainfall and the effects of the May 2010 cyclone. On the other hand, the situation has significantly improved in agropastoral and most pastoral areas of Northwest, which are currently identified in **BFI** phase. However, Sool Plateau and parts of East Golis are remaining in **HE** and **AFLC** phases, respectively (Map 9).

Map 9: Somalia Integrated Food Security Phase Classification, Rural Populations, July - December 2010



Gedo Region

The overall food security situation continues to improve in Gedo region where the number of people in food security crisis decreased by 50% since post *Deyr* 2009/10. Currently 45,000 people are in crisis, of whom 5,000 are in **HE** and 40,000 are in **AFLC**. From the previous season the number of rural people in **HE** decreased from 20,000 to 5,000 while those in **AFLC** decreased from 40,000 to 25,000. This significant reduction is mostly due to improvements in North Gedo where only Southern Agropastoral livelihood remains in **HE**. About 15,000 of urban poor are also in **AFLC**. The early warning level of **Watch** is projected for all livelihoods until the end of the year.

The improving food security situation is due to a number of factors: good *Gu* rainfall performance, increased cereal and cash crop production in the riverine areas, improved farming activities in Northern Gedo, following recent humanitarian interventions (distribution of seeds, irrigations pumps, etc), increased livestock reproduction, significant improvement in livestock prices and associated increases in income from crop, milk and livestock sales.

Livestock production and reproduction have significantly improved throughout the entire region due to good rangeland conditions. Camel calving rate is at medium level resulting in average milk production in most of the region. Goat sheep kidding/lambing rates are also at medium levels but expected to be at high to medium levels between mid-November and December 2010, due to the high to medium conception rates in May-June 2010. Cattle calving rate is currently low but with high conception rates in this *Gu* with off-spring expected in the coming *Deyr* season. Camel herd sizes increased and now slightly exceeds the baseline levels. Sheep, goats and cattle herds have shown a slight increase but are still significantly below the baseline levels throughout Gedo, due to high off-take from livestock sales to cover food/ non-food purchases and to pay-off the large debts accumulated during previous drought seasons. A portion of poor households in Southern Agropastoral livelihood of Northern Gedo remain in **HE** due to past droughts that significantly reduced cattle herd size, the main livestock species reared in this livelihood. Several normal seasons of rainfall, would be needed for the cattle herds to recover fully.

Crop production of Gedo region has been improving since the previous season although was still below normal in the *Deyr* 2009/10. However, the cereal production in the current *Gu*, estimated at 6,300MT, is very good and higher than *Gu* 2009 (434%), PWA (117%) and five-year average (417%) production estimates.

Cereal prices have been relatively stable since January 2010 showing a slight decline for maize and or remaining unchanged for sorghum. However, the cereal price is 21% lower compared to June 2009. Livestock prices have shown a slight decrease (5%) in the first half of 2010, especially for local quality goat, although they are still 29% higher compared to last year (June '09). Consequently, ToT between local quality goat and cereals (red sorghum) also slightly declined (5%) from the beginning of the year.

Although ToT is 60% higher than last year, it is remaining significantly below the levels of pre-inflation years (June 2003-2007) (Figure 12). Conversely, the ToT between daily labour wage rate and cereals has considerably improved in 2010, exceeding the levels of last year (50%) as well as the pre-inflation years (67%). The increase is mainly due to improved daily labour wage rates (13% from Jan '10) because of expanding labour opportunities from intensified agricultural and livestock activities and from cash-for-work programmes implemented in riverine communities of north Gedo. In June 2010, the ToT for cereal to goat was equivalent to 69kg of red sorghum per head, while ToT for cereal to labour was estimated at about 15kg of red sorghum per daily labour wage, which is the highest indicator since April 2007.

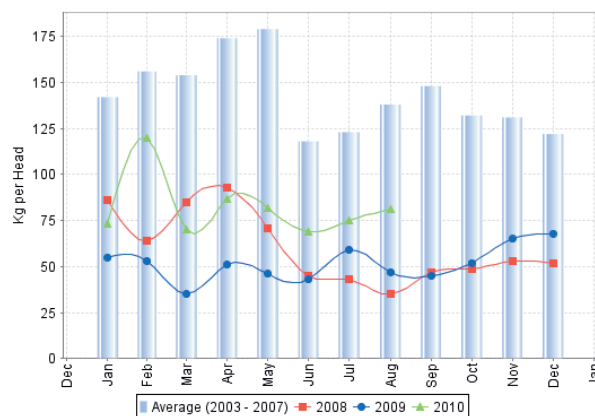
The nutrition situation varies across the livelihood zones of Gedo region. Among pastoralists, there have been improvements from a *Very Critical* phase in January 2010 to *Critical* thanks to increased access to milk. Agropastoralists' situation has deteriorated from *Critical* phase to *Very Critical*, while in the riverine livelihood zone, the nutrition situation is in a sustained *Critical* phase since the *Gu* 2009. Agropastoralists and riverine livelihoods' *Critical* situation is mainly due to food insecurity and high morbidity. Nevertheless, it is anticipated that the nutrition situation of agropastoralists will improve in the coming three months with increasing access to milk.

Juba Regions

After continued improvements in the last several seasons, the food security situation of Juba regions deteriorated in this *Gu* season due to floods occurred in May in the riverine livelihood. The floods, which caused temporary displacements and considerable damage to mainly standing crops, pushed the affected population into humanitarian emergency. Currently, in Juba regions 70,000 people are identified in **HE** and 25,000 are in **AFLC**. Nearly two-thirds of the populations in crisis (63%) are concentrated in Middle Juba. Riverine livelihoods of both regions are most affected, with 53,000 people in crisis (15,000 in **AFLC** and 38,000 in **HE**). The rest of the population in crisis is concentrated in urban areas of both regions. All other livelihoods are classified in the **BFI** phase. An early warning level of **Watch** is projected for all livelihoods up to the end of this year.

The food and livelihood security of agropastoral and pastoral areas of Juba regions, showed a continuous improvement in the last five seasons. Current improvements in pastoral livelihood are attributable to good *Deyr* 2009/10 rains as well as early start of *Gu* rains (in March). *Gu* rains had good performance in terms of coverage, duration and intensity, which contributed to significantly improved pasture/browse and water accessibility and to increased livestock production and reproduction. Livestock herd sizes for all species have mostly recovered from the droughts and are near or above baseline. Pastoral communities have also benefitted from high livestock prices (127% increase in Jan-Jun '10) and improved terms of trade between local goat and maize (105% of 5-year average).

Figure 12: Gedo Terms of Trade Local Quality Goat to 1Kg Red Sorghum



Flooded Fallow Fields, Koban, Jammame, L. Juba, July '10

As a result of plentiful *Gu* rains, Juba regions received good cereal harvest this season, which is estimated at 17,100MT (118% of PWA). Despite the flood damage in the riverine areas, maize production, which accounts for 60% of the total cereal production in the regions, is above normal (171% of maize PWA for two regions combined) due to considerable maize harvests collected in Juba Agropastoral. Namely, agropastoral livelihoods of Jilib and Jammame districts contributed about 25-28% of the total maize production of these districts. However, due to flood damage the overall maize production was below normal in these districts and it failed completely in Sakow. On the other hand, the floods in riverine areas provided opportunities for off-season cereal and cash crop cultivation. The projected off-season maize production is equivalent to 14,000MT (8,300MT maize and 5,700MT sesame and cowpea combined).

The ToT between daily labour wage and maize decreased by 29% in Lower Juba riverine in the first six months of 2010 (from 24kg to 17kg/daily) due to flood effects including reduced maize supply leading to increased prices and reduced agricultural labour opportunities resulting in decreased daily labour wages. However, the ToT is still significantly higher (55%) than in June 2009 (11kg/daily labour wage) due to good *Deyr* and *Deyr* 2009/10 off-season maize productions. In contrast, in Middle Juba, *Deyr* off-season maize production was insignificant while demand from neighboring pastoral livelihoods remained high. Therefore, the ToT between labour and maize declined by 36% from January 2010 (14kg/daily labour in Jan '10 and 9kg/daily labour in Jun '10) as well as from last year (14kg/daily labour in Jun '09).

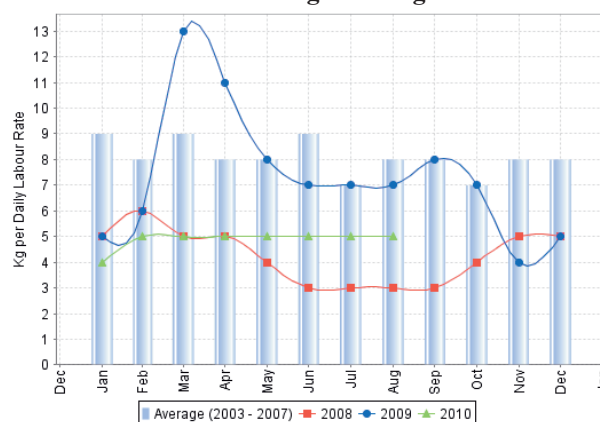
The nutrition situation in Juba regions shows a varied picture with improvements to **Serious** phase, from **Very Critical** in the *Deyr* 2009/10 observed in Juba pastoral livelihood zone. In the agropastoralists, the situation is in sustained **Critical** phase while in the riverine livelihood zone, there is deterioration to **Very Critical** from **Serious** phase in the *Deyr* 2009/10. Current improvements in pastoral situation are attributable to increased access to milk and milk products following improved livestock body condition and reproduction. Pastoral communities have also benefitted from improved terms of trade between local goat and maize. The deterioration in the riverine livelihood zone is attributed to poor access to cereal supplies following flood impacts, increased maize price and reduced purchasing power. A shrinking humanitarian space in Juba due to civil insecurity is likely to have aggravated the nutrition situation in the riverine community.

Bay and Bakool Regions

Overall, the food security situation in rural areas of **Bakool** and **Bay** regions further improved in this *Gu* 2010 season, following the above average long rains that favourably affected both livestock and crop productions. This development triggered a 26% reduction in the number of people in crisis since *Deyr* 2009/10. Currently, the total number of rural people in crisis in Bakool region is estimated at 85,000 with 5,000 in **HE** and 80,000 in **AFLC**. By livelihood zones, 75,000 agropastoral people are in **AFLC**, while in the pastoral livelihood 10,000 people are estimated to be in crisis (5,000 **HE** and 5,000 **AFLC**). Additionally, 25,000 of urban poor population in Bakool region are in crisis, with 20,000 people in **AFLC** and 5,000 people in **HE**. In contrast, the food security situation in **Bay** region has significantly improved in all livelihoods and currently the entire region is identified in **BFI**. An early warning level of **Watch** is projected up to December 2010 for both regions.

In **Bakool**, the food security situation for the urban population. Due to worsened civil security with sporadic fighting, arms movements and continuous tension since January this year, with consequential decline in economic activities in main towns and a pullout of many humanitarian agencies from the region. Conversely, the food security situation has improved in rural areas of Bakool due to two consecutive seasons of average crop and livestock performance. *Gu* 2010 cereal production is estimated at 4,200MT (216% of PWA and 679% of 5-year average), which is the highest in the last ten *Gu* seasons. Labour opportunities have also improved in agropastoral areas as well as in the neighbouring Bay region, which is also accessible to Bakool agropastoral communities. Livestock body conditions for all species in pastoral and agropastoral livelihoods are currently good and calving and kidding rates are average. As a consequence, milk supply has considerably improved in the region, which led to significantly reduced milk prices. Due to two consecutive average to good seasons, livestock herd sizes for all species are increasing, though still below the baseline in pastoral areas. An additional two to four average consecutive seasons are necessary to reach full recovery. Purchasing power (ToT labour wage to sorghum) has strengthened as indicated by an increased ToT of labour wages/ red sorghum (20%) in June 2010 (6kg/daily wage rate) compared to January 2010

Figure 13: Bakool, Terms of Trade Daily Labour Rate To Red Sorghum 1Kg



(5kg/daily wage rate). However, the ToT is 33% lower than same month in 2009 (9kg/daily wage rate) (Figure 13). ToT between local goat quality and red sorghum has a similar trend.

In **Bay** region, the food security situation has significantly improved primarily as a result of an exceptionally good *Gu* 2010 cash and cereal production (205% and 294% of PWA and 5-year average). Cricket outbreaks at the start of *Gu* season were controlled by good rains. Resumption of *Hagaa* rainfall at the crucial crops development stage and increased cultivated areas have further benefitted crop production. Households' access to income and food has therefore improved as a result of increased own production and greater labour opportunities from seasonal agricultural activities. In addition, households' cereal stocks can now last for more than 10 months. Purchasing power (ToT labour wage to sorghum) has slightly weakened since January 2010 following seasonal trends (2003 - 2007). However, the ToT is higher compared to June 2009 (9 kg/daily labour versus 12 kg/daily labour in Jun '10) and is on increasing trend as *Gu* harvest started entering the markets (Figure 14). Grazing and browsing conditions are also good in the region and pastures are widely available. Livestock is therefore in good body condition with medium to high calving/ kidding rates and herd sizes are near or above baseline. The improvement in rural areas contributed to improved food security situation among urban population of Bay as well. All urban people are completely out of crisis due to the improved access to food following the *Gu* 2010 bumper harvest, improved purchasing power and increased social support.

The overall nutrition situation in Bay agropastoral and Bakool pastoral livelihood zones remains likely **Very Critical**. In the Bakool agropastoralists, the nutrition situation has deteriorated and is likely **Very Critical**, from **Serious** in the *Deyr* 2009/10. Whooping cough disease outbreak (in Huddur, Tieglow and Rabdure only), high morbidity, limited access to health care and nutrition services, and shrinking humanitarian space as a result of civil insecurity are the under-pinning factors of the nutrition crisis in the agropastoral populations of Bakool and Bay. In Bakool pastoralists, livestock outmigration following persistent rain failure, which has led to poor access to milk, together with limited access to humanitarian services are the main underlying factors.

Lower and Middle Shabelle Regions

Despite continuous improvements in the livelihood situation of the Shabelle regions in the last two-three seasons, significant numbers of people in Middle Shabelle remain in a food security crisis. Out of total 47,000 people in crisis, 2,000 are identified in **HE** and 45,000 are in **AFLC** with an early warning level of **Watch**. Nevertheless, the number of affected people in this *Gu* 2010 has decreased by 76% from last *Deyr* 2009/10. This is attributable to good rainfall and improved crop production, livestock condition and purchasing power. The most distressed livelihoods in Middle Shabelle include Central Agropastoral with 2,000 people in **HE** and 7,000 in **AFLC**, followed by Southern Agropastoral with 28,000 people in **AFLC**. All urban livelihoods of Middle Shabelle are currently identified in **BFI**.

Rural livelihoods of Lower Shabelle have completely recovered from **AFLC** in *Deyr* 2009/10 (15,000 people) moving to **BFI** in this *Gu* season with an early warning level of **Watch**. This improvement is due to good rainfall, improved irrigation, crop and livestock production, increased labour rate and income from livestock and crop sales. In line with improvements in the rural livelihoods, the number of urban people in crisis have reduced since *Deyr* 2009/10 from 45,000 (35,000 in **AFLC** and 10,000 in **HE**) to 20,000 people (10,000 both in **AFLC** and **HE**) in *Gu* 2010.

The improvement in **Middle Shabelle** is attributed to average *Gu* 2010 rains, which had favorable impact on pasture and water. This development prompted the return of outmigrated livestock (during *Deyr* '09/10) to the region, which led to increased milk availability in the region. The *Gu* cereal production was also good and above average (300% of *Gu* '09, 138% of PWA and 177% of the *Gu* 5-year average of 2005-2009). Additionally, estimated 5,800MT of cash crops (rice, cowpea, sesame) were harvested. The households' purchasing power has significantly improved in

Figure 14: Bay, Terms of Trade Daily Labour Rate To Red Sorghum 1Kg

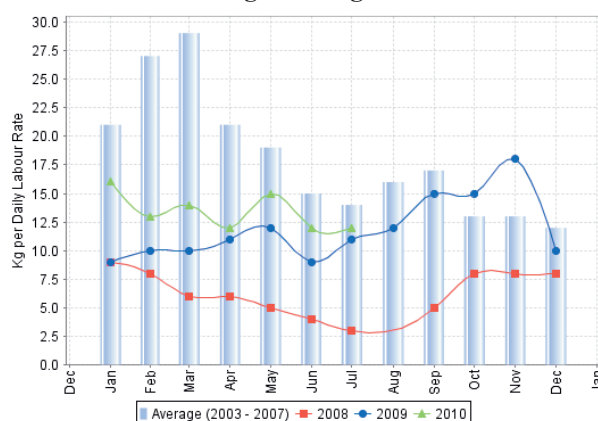
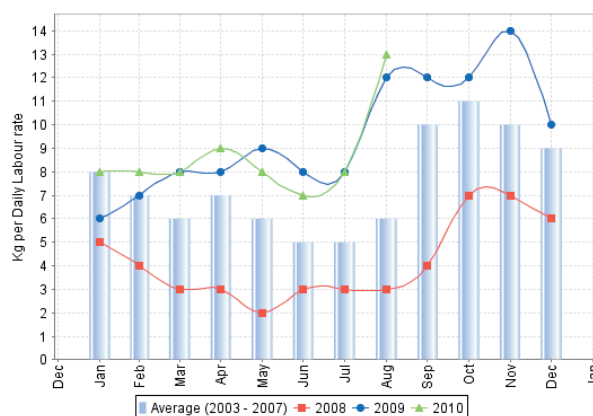


Figure 15: Shabelle Terms of Trade Daily Labour Rate To White Maize 1Kg



the first half of 2010, as shown by increases in ToT between daily labour wage and maize (75%) and ToT between local goat and maize (9%). In June 2010, a household could purchase up to 104kg of maize by selling one local goat and a daily labour wage could buy 7kg of maize or 8kg of sorghum. The increasing trend continued in the following month for both ToTs.

There have been improvements to the **Alert** nutrition phase in Middle Shabelle agropastoral and riverine livelihood zones, from **Serious** in *Deyr* 2009/10. The improvements are mainly attributed to improved food security situation with increased milk supply, access to cereals due to bumper harvests, and improved incomes from the agricultural activities. Increased incidence of acute watery diarrhea during the *Gu* 2010 rainy season however aggravated the situation.

In **Lower Shabelle** food security situation has improved due to good cereal production, improved livestock conditions and increased milk production. The region, which is the main maize producer in Somalia, had a 2nd highest *Gu* cereal production over the last five *Gu* seasons (107% of PWA, 153% and 92% of *Gu* '09) due to favorable rains, improved irrigation accessibility and increased cultivated area. Cereal stocks will be sufficient for most wealth groups until next harvest due to good supply from the last two seasons (*Deyr* '09/10 and *Gu* '10). In addition, cash crop production was good in this *Gu* 2010 season amounting to 1,100MT for sesame and 2,400MT for cowpea. The ToT between labor wage and maize somewhat declined in the first six months of 2010 (from 8kg/ daily labour wage in Jan '10 to 7kg/ daily labour wage in Jun '10), as a result of higher cereal prices in local markets. The rate of decline in ToT was similar compared to last year (8kg/ daily labour wage in Jun '09). However, this trend is likely to improve, due to the decrease of cereal prices in the key agricultural areas of the region, as a result of good harvest and improved supply in both agropastoral and riverine areas.

In Lower Shabelle agropastoral and riverine livelihoods zones the situation is in a sustained **Serious** phase, while in the Afgoye IDPs, the situation remains in a sustained **Critical** phase since the *Deyr* 2009/10. Whereas there was increased access to cereal following a bumper harvest, an outbreak of acute watery diarrhea negated the situation.

Hiran Region

The food security situation in Hiran region has continued to deteriorate since *Deyr* 2009/10, though there is a slight improvement in pastoral livelihoods due to average rainfall performance. However, the entire region is still in sustained **HE** phase with an estimated 205,000 people, or 62% of the total regional population, in a food security crisis. The majority of the total people in crisis, or 135,000, are in **HE**, while 70,000 are in **AFLC**. The Agropastoral livelihood zone is the one most affected, with currently 85,000 people in **HE** and 38,000 in **AFLC**. In the pastoral livelihood, population in crisis significantly shrank from *Deyr* 2009/10 and presently is estimated at 25,000 people, the majority (60%) of whom are in **HE**. An estimated 30,000 people in riverine livelihood remain in **HE** with no change from *Deyr* 2009/10. The total number of affected urban population has slightly decreased from *Deyr* 2009/10 and is currently estimated at 25,000 people (20,000 in **AFLC** and 5,000 in **HE**).

The sustained food security crisis in Hiran region, particularly in agropastoral and riverine livelihoods, is attributed to a combination of factors, including extremely low cereal production (19% of PWA) due to poor *Gu* 2010 season preceded by seven seasons of below normal rains, river floods that have destroyed about 4,800Ha of standing crops and caused temporary displacement, recurrent conflicts and low economic activity in the region. In addition, income earning opportunities are constrained by the lack of agricultural labour activities and reduced number of marketable livestock.

There is a slight improvement in pastoral livelihoods. Better pasture and water availability resulted in an increased number of marketable animals due to improved livestock body condition and increased milk production.

As a consequence, milk prices decreased and are 13% and 16% lower compared to June 2009 and January 2010, respectively. Camel herd sizes in Hawd livelihood are near to baseline levels, while in Southern Inland Pastoral (SIP) it is below baseline. Sheep/goats herd sizes are slightly above baseline levels in Hawd livelihood, but below baseline levels in SIP. Increases in herd size are projected for all livestock species.

Cereal prices are high throughout the region, as a result of poor local production and reduced and intermittent cereal supply from neighbouring regions and from trade with Ethiopia due to the worsening security situation. During January-June 2010 red sorghum price decreased by 10% likely due to the supply of commercial food aid from Central, Northeast and *Gu* harvest from southern regions (Bay). However, it is still significantly (80%) higher than



Floods deteriorated the market access. Ijin vilaage, Jalalaqsi, Hiran, May 2010

June 2009 price levels. Maize prices have been stable since January 2010 and 25% higher than one year ago (June '09). Consequently, poor households' purchasing power weakened as indicated by the decline in ToT (labour wage/sorghum) (14kg/daily labour in June '10) compared with the levels at the start of the year (17kg/daily labour) and last year (24kg/daily labour in June '09). In contrast, ToT between local goat and red sorghum has considerably increased (by 77%) since January 2010, due to increased prices for livestock in good body condition. However, the ToT is still 37% lower compared to June 2009.

The nutrition situation for Hiran agropastoral and pastoral population groups is **Very Critical** since the *Deyr* 2009/10. For the riverine populations, there has been deterioration from *Critical* phase in *Deyr* 2009/10 to **Very Critical** attributed to widespread whooping cough and measles. The factors behind the current crisis include: poor access to cereal and milk across the livelihoods as a result of previous seasons of below normal rains; asset losses following internal displacements as a result of the ongoing civil insecurity; limited income earning opportunities due to the lack of agricultural labour activities and a small number of marketable livestock at household level.

Central Regions

The food security situation in rural livelihoods of Central has shown some improvement in the post *Gu* 2010. Number of rural people in crisis has significantly decreased (by 25%) from last *Deyr* and currently is estimated at 305,000. 215,000 people are in **AFLC**, while 90,000 are in **HE**. The Hawd and Addun pastoral livelihoods of Central continue to remain in **HE** despite some improvements, following good rainfall performance. The Coastal *Deeh* has been improving since *Deyr* 2009/10 and currently upgraded to **AFLC** due to recovering livestock herd size. In contrast, the situation has slightly deteriorated the Cowpea Belt due to crop failure. The number of urban people in crisis has also decreased - from 65,000 in *Deyr* 2009/10 to 45,000 in *Gu* 2010. Due to continuing conflict among different factions, an early warning level of **Watch** is identified for all livelihoods up to the end of December 2010.



Camel in good body condition, Hawd Pastoral, Abudwaq, July 2010

The food security situation in Hawd and Addun pastoral livelihoods of central regions started to improve due to good rainfall performance, which resulted in improved pasture and water conditions and normal livestock migration. Most water sources, like *berkads* and *ballies* are now replenished, which alleviated the severe water shortage experienced during last *Deyr* 2009/10. Body conditions of all livestock species have also improved, which increased availability of marketable animals. Although camel milk production is below average due to low to none calving, camel milk market prices have declined by 33% since January 2010 as a result of high yield per day per head, when compared to *Deyr* 2009/10 season. Small ruminants had high conception rates and, therefore, their herd size is expected to increase in *Deyr* 2010/11.

The purchasing power has also improved in the first six months of 2010, as shown by the increase (9%) in ToT between local goat and rice as a result of improved goat prices and reduced rice prices. However, the food security situation is exacerbated by increasing displacement and a temporary halt in humanitarian aid due to worsening civil security. Also number of pastoral destitutes, (22,000 people) concentrated mostly in urban and semi-urban areas of Central due to recent persistent multi-year drought. These drop-out pastoralists are in humanitarian emergency and require a strategic special support for restoring their livelihoods and improving the food security.

Food and livelihood security of agropastoral livelihood in the Cowpea Belt deteriorated due to below normal rains and crop failure which reduced poor households' income from crop sales. In contrast, the food security situation in Coastal *Deeh* has significantly improved since *Deyr* 2009/10, despite below normal *Gu* rains, considering that good pastures are available in adjacent livelihood of Adun for pastoral migration. This has resulted in improved livestock body conditions and medium to high conception rates for all livestock species (camel, cattle, sheep and goat) in Coastal *Deeh*. However, livestock herd sizes still remain below baseline levels (sheep/ goat – 77 % of baseline). Another positive indicator of the increased price of local quality goat compared to January 2010 (10%) as well as June 2009 (17%). However, the ToT continues to decline, due to high cereal prices.

The nutrition situation is in a sustained **Critical** phase in the Hawd. In the Addun pastoralists, the situation has deteriorated to **Very Critical** from *Critical* in the *Deyr* 2009/10. Similarly, in the Coastal *Deeh*, the situation had deteriorated from *Alert* phase in the *Deyr* 2009/10 to **Serious**. The deteriorations in the Addun and Coastal *Deeh* are due to low access to milk and milk products. In the Cowpea Belt, there is deterioration from *Serious* and is likely to be **Critical**, mainly due to reduced household access to food and income following below normal rains and crop failure. Poor asset holdings, insecurity/displacements, limited humanitarian and social support, and poor road infrastructure that hinders access, are the driving factors in the current nutrition crisis in central regions.

Northeast Regions

The food security situation has deteriorated in the livelihoods of Northeast, including East-Golis, Coastal *Deeh* and Dharoor valley, following two successive seasons of poor rainfall. These livelihoods are currently in crisis and identified in **AFLC** as opposed to **BFI** in *Deyr* 2009/10. The Hawd and Addun pastoral livelihoods in Nugal and Northern Mudug regions remain in **HE** phase as in *Deyr* 2009/10. The remaining livelihoods of Northeast are still in **BFI**, unchanged from previous season. The total population in a food security crisis in the Northeast (Bari, Nugal and north Mudug regions) is currently estimated at 150,000, of which 8,000 are pastoral destitutes and 95,000 are in urban areas. Of the total population in crisis, 140,000 are in **AFLC** and 10,000 are in **HE**.

Most regions of Northeast have received above average *Gu* rains and unseasonal average rains in mid *Jilaal*, which significantly improved both rangeland and water conditions. This has led to high livestock conception rates as well as improved livestock body condition (camel, sheep and goat). Consequently, fully replenished water sources in the drought-stricken Hawd and Addun livelihoods eliminated water trucking and resulted in significantly reduced water prices (by 41% from Dec '09 - 2,392 SoSh/20ltr Jerrycan). Localized areas of Addun Pastoral of Jariban (Mudug), East Golis/Gabi of Qandala (Bari) and Coastal *Deeh* of Eyl (Nugal), which received below normal rains, benefitted from good pastures in adjacent livelihoods.



Good Cattle Body Condition in Karkaar Valley, Qardho District, Bari region, July '10

The Addun Pastoral livelihood of north Mudug still remains in **HE** for the following reasons: significant asset loss during the past five successive droughts (*Deyr* '07/08, *Gu* '08, *Deyr* '08/09, *Gu* '09 and *Deyr* '09/10); limited own production for consumption and sales; declined livestock prices; high cereal prices due to soaring transport costs caused by poor road infrastructure. The deterioration in East-Golis, Coastal *Deeh* and Dharoor valley livelihood zones of Bari region is attributable to poor frankincense production following two poor rainy seasons as well as a cyclone in May 2010, which destroyed date palms and damaged road infrastructure and houses. Reduced labour opportunities from fishing activities because of piracy and high sea tides have also contributed to a deterioration of food security in this area. Conversely, the food security situation significantly improved in Hawd Pastoral because of livestock outmigration during past droughts as well as increases in income from livestock sales due to growing numbers of saleable animals and easy access to main markets.

The price of rice, which is the main staple cereal in the Northeast, has increased by 9% since January this year, due to reduced supply in Monsoon season. However, a fall in sorghum prices since June last year has allowed poor households to cope with rice price increases by switching to sorghum consumption. Labour wage rates have slightly increased (by 4%) during January-June due to improved labour opportunities from widespread rehabilitation of *berkads* following good *Gu* rains as well as intensified livestock trade activities for the coming Hajj period. Consequently, the ToT between daily labour wage and sorghum is unchanged since January, while it is 40% higher than last year (June 2009) due to lower cereal prices in the current season. The ToT between local goat and cereals has increased in the same periods of comparison, by 18% and 29%, respectively.

The nutrition situation in the Northeast shows a mixed picture since *Deyr* 2009/10. There are improvements from *Serious* in the *Deyr* 2009/10 to *Alert* in the Nugal Valley pastoralists and a sustained *Alert* in Sool Plateau. The improvements are attributed to increased access to milk and milk products following return of lactating livestock from out migration. There are however deteriorations in the Coastal *Deeh* from *Alert* to *Serious*, in the Golis/Kakaar from *Serious* to *Critical*, in the Addun of Jariban from *Critical* to *Very Critical*, and a sustained *Critical* phase in Hawd. This is mainly attributed to poor access to milk and milk products following below normal *Gu* 2010 rains and to pastoralists' outmigration to the adjacent livelihoods with good pasture.

Northwest Regions

The food security situation has improved in most pastoral and agropastoral livelihoods of the Northwest. Currently the total population in crisis is estimated at 75,000 people, of which 40% percent are in rural areas. Sool-Sanaag Plateau Pastoral classified in HE during post *Deyr* 2009/10 remains in **HE** in the post *Gu* 2010. Pastoral livelihoods of Hawd, Nugal Valley and most of Golis/Guban have improved to **BFI** with an early warning level of **Watch**. However, East Golis of Lasqoray district (Sanaag) remains in **AFLC** with **moderate risk of deterioration to HE** as in the post *Deyr* 2009/10. All agropastoral areas are defined as **BFI** in the post *Gu* 2010, indicating an improvement from previous phases of **AFLC** (Awdal and Hargeisa district of W.Galbeed) or **HE** (Togdheer). Thus, out of the total 30,000 rural people in crisis, an estimated 15,000 people are in **HE**, while the rest are in **AFLC**. In urban areas, an estimated 15,000 people are in **HE** and 30,000 are in **AFLC**.



Good Pasture Condition, Hawd LHZ, Hargeysa, July, 2010

The food security situation in the pastoral areas of the Northwest has improved due to good rainfall performance, positively affecting pasture, water and livestock conditions. Lambing/kidding rate of sheep/goats currently is medium to high. However, camel calving is still low to none, which resulted in below average camel milk production across different regions of the Northwest. Livestock herd size increased in most livelihood zones, with the exception of Sool Plateau, which is showing the largest decline from the baseline figures (sheep/goat is 33% of baseline; camel is 1% of baseline). Water prices have returned to normal after water trucking for livestock had stopped in Sool Plateau, Hawd and Upper Nugal valley. However, Sool Plateau poor households' access to water for human consumption is still constrained by the lack of pack camel to carry water. Pastoral migration currently is normal due to improved pastures, which contributed to reduced migration expenses and ended related debt accumulation among the pastoralist populations. Pastoral destitution in Sool, Togdheer, and Sanaag regions has also reduced since January 2010 with limited number of drop-out pastoralists moving towards villages and urban centers in search of support.

The food security situation has significantly improved in agropastoral livelihoods of Togdheer, Awdal and W.Galbeed regions due to bumper cereal harvest (735% of *Gu/Karan* '09, 286% of PWA, 230% of 5-year average of 2005-2009) and good cash crop production, (crop fodder, grass fodder and watermelon) following considerable humanitarian intervention from various agencies .

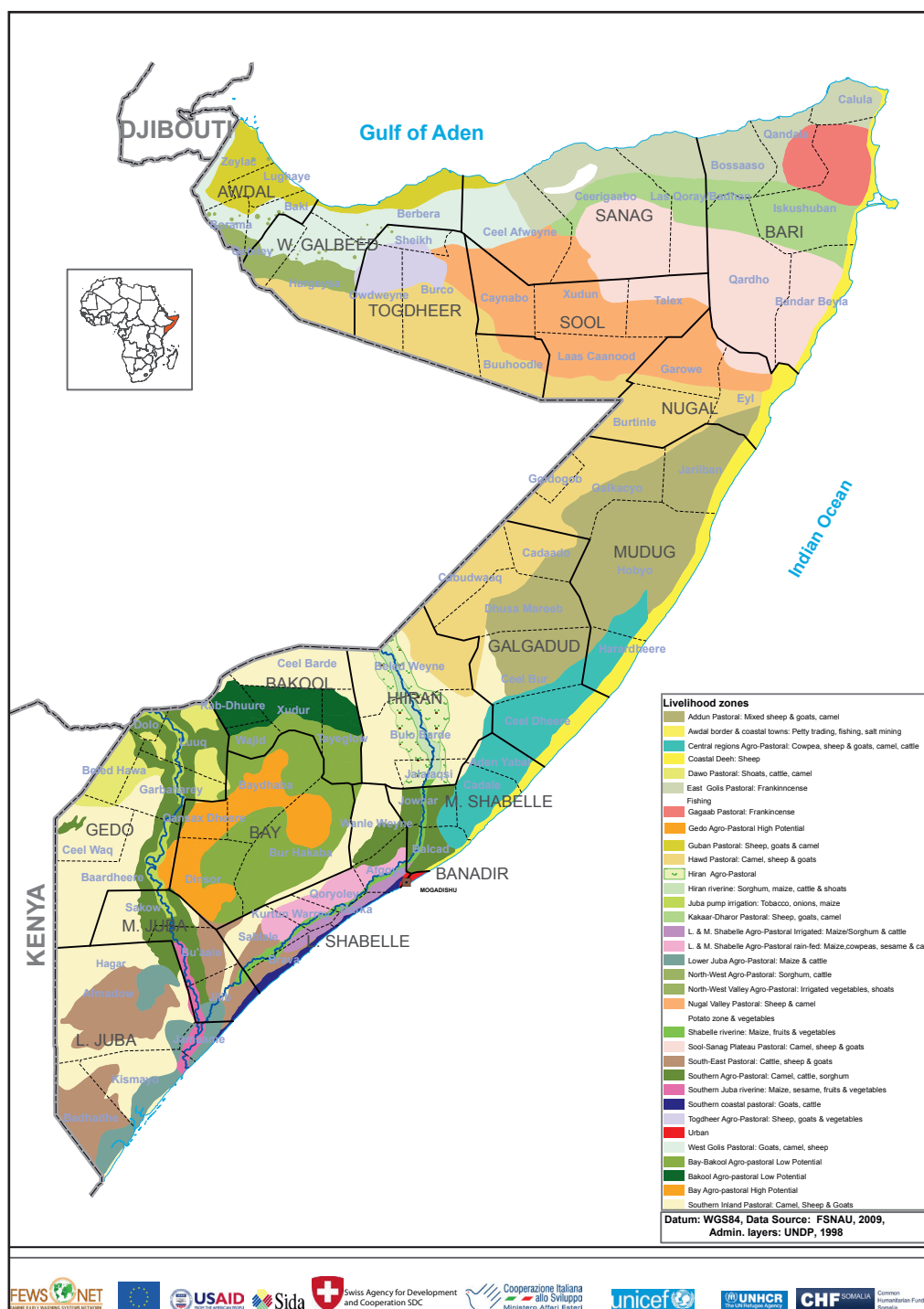
Since June 2009 cereal prices (sorghum) have decreased in most markets by 15-20%. All regions are maintaining January 2010 price levels due to increased market availability of cereals coming from southern Somalia, Ethiopia and partly from early harvests of local maize and sorghum. Local quality goat prices increased in all regions due to improved body condition and high demand for domestic consumption. Consequently, the purchasing power of populations, as measured by ToT between sorghum and labour as well as ToT between local quality goat and sorghum, has increased across all regions. However, poor households in Sool Plateau cannot benefit from the ToT increases due to limited number of livestock available for selling, compared to the other pastoral livelihoods of Northwest.



Good Sorghum Establishment, Idhanka, Gabiley, W Galbeed, July '10

The nutrition situation shows a mixed picture with improvements to **Serious** from **Critical** in the Togdheer agropastoralists, and to **Alert** from **Serious** in the East Golis and Sool Plateau since the *Deyr* 2009/10. There is a sustained **Alert** phase in Sool Plateau pastoralists and **Serious** in the Hawd. However, there is deterioration in West Golis to **Serious** from **Alert** in the *Deyr* 2009/10. The changes in nutrition situation are mainly attributed to access to milk and milk products, which are subject to livestock migration dynamics.

Map 9: SOMALIA LIVELIHOOD ZONES



Recent and forthcoming publications and releases

FSNAU/FEWSNET Gu 2010 Seasonal Climate Update, August 2010

FSNAU/FEWSNET Market Update, July 2010

FSNAU/WB RRRRL Project Somali Knowledge Attitude and Practices Study (KAPS) July 2010

FSNAU Technical Series Report Post Gu '10 Nutrition Situation, September 2010 (Forthcoming)

FSNAU Technical Series Report, Post Gu '10 Analysis, September 2010 (Forthcoming)

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

Funding Agencies

