FSNAU
Food Security and Nutrition Analysis Unit-Somalia

Food Security & Nutrition

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Quarterly Brief - Outcome of *Jilaal* Dry Season (Jan-Mar '12)

KEY FINDINGS

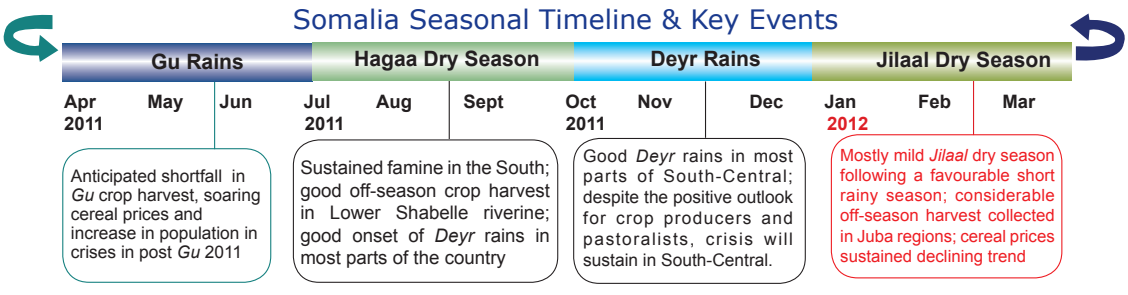
The food security situation in Somalia improved considerably in post-*Deyr* 2011/12 compared to last year when a famine ravaged many of the southern parts of the country. In the April-June 2012 period, **2.51 million people across the country remain in food security phases of Crisis or Emergency as classified earlier this year (Jan '12).** However, the number of people in **Emergency** (IPC Phase 4) has reduced, as Juba and Gedo riverine livelihoods have improved from Emergency to **Crisis** (IPC Phase 3) (Table 1). The contributing factors to these improvements include a sizable off-season maize harvest (Mar-Apr '12) and on-going fishing activities in Juba riverine; and access to labour income for cash crop activities in Gedo riverine. The poor households in Gedo region also have the highest Terms-of-Trade (ToT) between labour and cereals in the country (Mar '12). Forecasts for near normal *Belg* rains in the Ethiopian highlands (mid-Mar–2nd *dekad* of June)[1] should ensure availability of irrigation from river water in southern Somalia. Irrigation access will provide the poor riverine population with opportunities for farm labour and own crop production in this *Gu* season. The food security situation in the rest of Somalia will remain unchanged up to June 2012, regardless of the behavior of *Gu* rains, which currently is projected to be below normal. This is due to the positive effects of favorable *Deyr* (Oct-Nov '11) season and the humanitarian support in the South in the first quarter of the current year. The impact of both factors are reflected in the improved cereal supply in the country; presence of cereal stocks among many of the poor farmers; declining trend in cereal prices and a strengthening purchasing power; reduced cost of living for market-dependent population, which currently include the majority of Somalia's population; largely sustained good to average livestock conditions; increased kidding/lambing; and improved livestock prices.

However, the *Jilaal* dry season (Jan-Mar '12) was harsh in parts of the North (Coastal *Deeh* of Bari, Sool Plateau, Nugaal Valley, Golis/Guban and pockets of Hawd livelihoods in Togdheer and W. Galbeed regions) where the short rainy season (Oct-Dec '11) was below normal. In these areas, *Gu* rains have not yet began effectively. Therefore, rangeland resources and livestock conditions are below average. FSNAU has initiated the dekadal field-based rainfall monitoring, which will allow for timely early warning of the impact of long rainy season on livelihoods of Somalia. The information on the rainfall performance in the first two *dekads* of April is included in this report.

Based on nutrition data from health facilities, **the nutrition situation across southern Somalia shows slight improvement in March compared to January this year**. However, the situation still remains ***Likely Very Critical***, with malnutrition rates being slightly elevated compared to seasonal trends. This has been characterised by increased morbidity and disease outbreaks. However, in most of northern and central regions the situation remains likely ***Serious*** and largely unchanged since January 2012 (*Source: Nutrition Technical Series report, March 9, 2012*).

Gu rains commenced in most parts of the South while key pastoral areas in Central and North remain dry. *South*: In most parts of the South, *Gu* rainfall started on time, which was in contrast to earlier rainfall forecasts[2] of delayed onset of the long rainy season. Given the mild *Jilaal* season and the start of the *Gu* rains, pasture and water conditions are now average to good in most parts of southern Somalia and *Gu* planting activities are on-going. Currently, about 78 percent of the poor population in the riverine livelihoods have *Deyr* 2011/12 cereal stocks that will last through May to July. Similarly, *Deyr* cereal stocks will last up to June-July for 40 percent of the poor households in agropastoral livelihoods, predominantly in crop-dependent regions of Bay, Shabelle, Gedo and Juba. However, in the livestock-dependent agropastoral livelihoods of Bakool, Hiran and Gedo regions, the poor households have already exhausted their stocks and they increasingly depend on market purchase, social support or humanitarian assistance.

1 Intergovernmental Authority on Development Climate Prediction and Application Centre (ICPAC) forecast released on 29 February, 2012
2 Ibid



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key findings

Central and North: The *Gu* rainy season started with some delay in Cowpea Belt and Coastal *Deeh* livelihoods of Central although the rains were light and poorly distributed. However, the major pastoral livelihoods of Hawd and Addun currently remain dry. Most parts of the North also remain dry including large areas in Sool Plateau and Nugaal Valley, which are identified in ***Crisis*** phase in the post-*Deyr* 2011/12. Pasture and water availability in most parts of central and northern pastoral livelihoods currently are below average to poor, respectively. Over the *Jilaal* period, the livestock body condition in the areas with poor short rainy season (see above) deteriorated from average to below average. However, the purchasing power of the rural poor households has strengthened in most areas of Central and North due to decrease in cereal prices (rice) and increase in livestock prices (goat) given rising demand for the coming festive season of Ramadan (June-July).

Cereal prices continue a downward trend in favour of market-dependent population

Currently, about 70 percent of the total population of Somalia, including urban, internally displaced persons (IDPs), pastoral and portions of the poor population in agropastoral and riverine livelihoods, acquire cereals through market purchases, social support or humanitarian assistance. In the first quarter of 2012, the cereal prices continued to decline in most markets of the country. Particularly significant price drops were observed in the southern markets due to high cereal supplies from *Deyr* season production, recent off-season harvest (Mar '12) and ongoing humanitarian interventions. Compared to a year ago, the local cereal prices are 50-60 percent lower in southern Somalia. In March 2012, the prices were at their lowest for three years in the regions of the Sorghum Belt and Lower Shabelle. However, on the markets of the central regions the red sorghum price increased slightly in the first three months of the current year due to disruptions in trade activities resulting from prevailing insecurity in the regions. The ToT between cereals and casual labour wage or local quality goat is favorable across the country, and is considerably higher compared to the levels at the same time last year.

The cereal price trends in the coming months will largely be determined by the *Gu* harvest and flow of humanitarian food. Although, the security situation remains extremely volatile with continuous fighting going on in South-Central, more areas became accessible to humanitarian actors (Hiran, Bay, Gedo, Bakool, parts of Juba and Galgadud).

Nutrition situation in the South has improved significantly since July-August 2011, but remains Likely Very Critical

Based on the seasonal trends of nutrition data from the health facilities and information on disease outbreaks from World Health Organisation (WHO), the nutrition situation across southern Somalia is ***Likely Very Critical.*** Nutrition data from health facilities in southern regions of Juba, Bay and Bakool for the period January-March 2012, indicates a high proportion (15% and above) of children visiting the clinics as acutely malnourished. For Shabelle and Mogadishu urban population, however, health facilities' data for the same period depicts lower levels (10-15%) of visiting children being acutely malnourished. According to the WHO's *Somalia Emergency Health Update* (24-30 March), there is elevated morbidity associated with malaria in Lower Juba, Gedo, Lower Shabelle and Banadir regions, and outbreaks of acute watery diarrhea (AWD) and suspected cholera in Middle Shabelle, Middle Juba and Gedo regions. The number of AWD cases across Somalia is expected to increase during *Gu* rainy season (April-June) based on historical trends. Household food access remains a challenge in the lean season (April-June) as food stocks of the poor households diminish, humanitarian access is still constrained due to insecurity and *Gu* rains are expected to be below normal according to current forecasts. However, in most of northern and central regions the situation remains likely ***Serious,*** unchanged since January 2012 (*Source: Nutrition Technical Series report, March 9, 2012*).

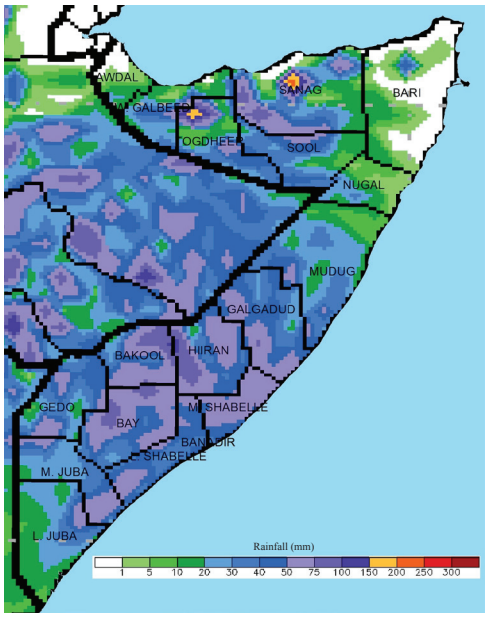
Table 1: Changes in Estimated Population in IPC Phases in Juba and Gedo Riverine (2012)

		Jan - Mar 2012 Classification		Apr - Jun 2012 Classification
Region	**District**	**Crisis**	**Emergency**	**Total Population Affected - Crisis**
Gedo	Baardheere	5,000	6,000	11,000
	Belet Xaawo	1,000	1,000	2,000
	Doolow	1,000	1,000	2,000
	Luuq	2,000	3,000	5,000
Sub Total		**9,000**	**11,000**	**20,000**
Juba Dhexe (Middle)	Bu'aale	7,000	14,000	21,000
	Jilib	10,000	20,000	30,000
	Saakow/Salagle	4,000	10,000	14,000
Sub Total		**21,000**	**44,000**	**65,000**
Juba Hoose (Lower)	Kismaayo	3,000	6,000	9,000
	Jamaame	13,000	27,000	40,000
Sub Total		**16,000**	**33,000**	**49,000**

SECTOR HIGHLIGHTS

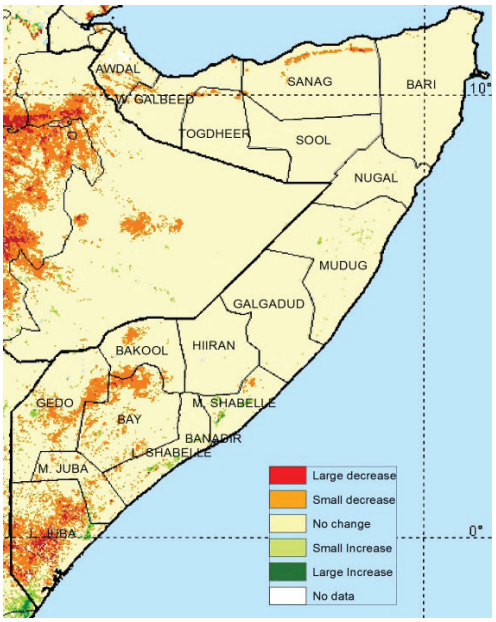
CLIMATE

Map 1: NOAA CPC 7 day Rainfall Forecast (Valid up to 30th April 20120)



Source: National Oceanic and Atmospheric Administration (NOAA)

Map 2: NDVI Absolute Diffrerence from LTM for the 1st Dekad (1-10 of April 2012)



Source: Satellite Pour l'Observation de la Terre (SPOT)

Rainfall Performance

The 2012 *Jilaal* dry season (Jan-Mar) was harsh in the northern livelihoods of Sool Plateau, Nugal Valley and Golis where the last *Deyr* season performed poorly. Hawd pastoral and Coastal *Deeh* were similarly impacted by the prolonged dry conditions (since Nov '11). In these areas, rangeland water resources have become depleted and high livestock influx from rain-deficit areas (during the last *Deyr* season) has further worsened the situation. In contrast, the dry season was relatively mild across the rest of Somalia, which had benefited from an above average *Deyr* rainfall. The Shabelle and Juba river levels are currently reported to be low, but are likely to increase in the coming days due to significant rains that fell over the Ethiopian highlands.

The *Hays* rains (Jan-Feb) were erratic and poor in Guban[3] livelihood for which this is the only rainy season. No *Todob*[4] rains (late March) were reported across the country. However, between late-March and the first *dekad* of April, moderate rains with an average distribution fell in most parts of Awdal and W. Galbeed regions of the Northwest. In the same period, a few days of localized light to moderate rains were received in Golis (Sanaag and Bari), parts of Sool Plateau (Sanaag), pockets of Juba, Gedo, Bay and Bakool regions. The field reports for the 2nd *dekad* of April indicate light to moderate rains in all regions in the South. In the Northwest, the moderate rains were received in localised areas in Hawd and Nugal and Sool Plateau, while rainfall performance was average in Awdal and W.Galbeed. In Central and Northeast only localised light showers were reported.

Based on the forecasts issued in February and March 2012[5], there is an increased likelihood of below average (60-85% of average) *Gu* rains with late onset and erratic distribution across Somalia. However, according to the US NOAA National Weather Service's (NWS) one-week forecast (valid up to 30th of April, 2012) for the Horn of Africa, increased rainfall activity (40-150mm) is expected in most of the Northwest, Central (Galgadud and parts of Mudug) and in the southern regions of Hiran, Bay, Bakool, Gedo, Shabelles and the Jubas (Map1).

Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) for the first *dekad* of April 2012 indicate normal vegetation conditions in most parts of the country (Map 2). The exceptions are localized areas of Golis in the North, Bay, Bakool, Gedo and most parts of Juba regions where predominantly small decreases in NDVI from the Long Term Mean (LTM) are depicted. Significantly poor vegetation conditions are depicted in parts of the pastoral and agropastoral livelihoods of Afmadow, Kismayo and Badadhe districts in Lower Juba where NDVI shows small to large decreases from the LTM.

3 Guban is the Coastal livelihood of northern Somalia along the Gulf of Aden
4 *Todob* are shower rains that occur in most areas of Somalia during the last *dekad* of March
5 IGAD Climate Prediction and Application Centre released the forecast for the *Gu* rains in February 2012. The March forecast for the *Gu* 2012 rains was issued by the International Research Institute for Climate and Society. This forecast was also highlighted in USAID-FewsNet Special Brief for East-Africa (April 3, 2012)

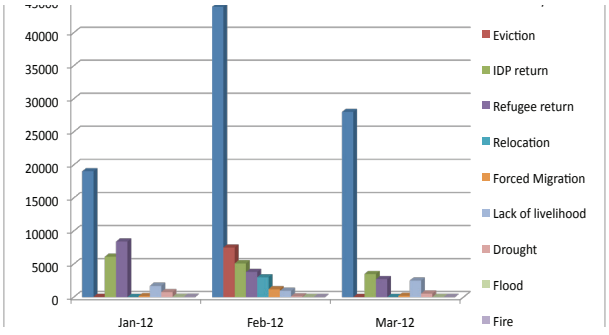
CIVIL INSECURITY

In the first quarter of the current year, civil insecurity in South-Central regions remained a key contributing factor to the massive population displacements; disruption of livelihoods and economic activities; interruption of trade flow and commodity movements; and restriction of humanitarian access. Juba, Gedo, Bay, Bakool, Galgaduud and Hiran regions continued to bear the brunt of the prolonged conflict between the Transitional National Government (TFG) and anti-TFG militias. In February-March, the major fighting also occurred between the opposing groups in the outskirts of Mogadishu city and areas leading to the Afgoye corridor. Despite improvements in the security situation in Mogadishu (since Aug '11), frequent violence and insecurity remain a problem. There have been reports of roadside bombings, suicide bomb attacks, hurling of hand grenades and sporadic clashes (either within the TFG military ranks and/or between TFG and the Al-Shabaab). After fierce fighting (Feb-Mar '12) the TFG and its allies captured the Al-Shabaab controlled towns of Baidoa, Hudur, Mahas and Elbur. In the North, conflicts were reported between Somaliland government and militias supporting Khatumo state in Sool and Togdheer. This fighting was a particularly intense in Buhodle of Togdheer and Kalabaydh of Lasanod (Sool). However, there were no major resource-based conflicts in the rural areas during this reporting period.

Direct and Indirect Impacts

The total population movement in the first quarter of the year is 139,000 people according to the United Nations High Commissioner for Refugees (UNHCR). Specifically, in February the number of IDPs was nearly double (66,000) of January (36,000) and March (37,000). This was mainly a result of conflict (Figure 1). The latest UNHCR and FSNAU reports indicate massive displacements from Afgoye corridor and other conflict-prone regions into Mogadishu.

Figure 1: Population Movement (Jan-March 2012)



The FSNAU March field reports indicate that the ongoing conflict in the outskirts of Mogadishu disrupted the market supply lines thereby, constraining the flow of local food items (local cereals, milk, meat and vegetables) into the city from the neighbouring Shabelle regions. In addition, a daytime curfew (7am to 11.30 am) in Beledweyne town imposed since February has significantly affected trade flows, income opportunities and access to health/education services of the urban households. In parts of the hotspot regions (Juba, Gedo, Galgadud, etc.), the prevailing violence has hampered access to rangeland resources for the rural population, disrupting trade-flows for both the urban and rural populations. The ban on humanitarian activities in much of southern and central regions under the control of insurgents remains active, denying the population in crisis easy access to humanitarian support. Currently, humanitarian interventions are ongoing in the North, South (Banadir, much of Gedo, Badhade and Kismayo of Juba) and Central (Galgadud and Mudug). The conflict is likely to continue and even worsen in the coming few months with a high likelihood of further loss of life, displacement of populations, property destruction and disruption of livelihoods and economic activities.

AGRICULTURE

In late March - early April 2012, FSNAU undertook a rapid assessment to estimate the off-season crop harvest and assess the *Gu* 2012 agricultural season preparation activities such as land cultivation, sowing, irrigation, canal rehabilitation, etc. The assessment results reveal that a total of 29,500ha of off-season crops (maize, sesame and cowpea) were harvested in the riverine areas of Lower Juba, Middle Juba, Gedo and Lower Shabelle and in the High Potential Agropastoral livelihood of Bay. Off-season crop production by region is summarised in the table below (Table 2).

Table 2: *Deyr* 2011/12 Off-Season Production Estimates

	March 2012 Off-Season Production Estimates (Mt)		
Regions	**Maize**	**Sesame**	**Cowpea**
Gedo	500	-	-
Middle Juba	3,200	1,940	260
Lower Juba	6,700	1,600	310
Lower Shabelle	450	900	-
Bay	680	200	-
Total	**11,530**	**4,640**	**570**

The area harvested under maize was lower than projected previously in Middle Juba (Buale and Sakow) and Lower Shabelle (Kurtunwarey), due to insect infestation (stalk borers, grasshoppers, aphids) and moisture stress brought on by high temperatures. However, the overall off-season maize production in southern Somalia is almost twice the amount projected in the post *Deyr* assessment. This is because of significantly increased maize cultivation in Jilib of Middle Juba and Jamaame of Lower Juba given high recessional cultivation[6] opportunities, accounting for 68 percent of the total off-season maize production. The off-season sesame production is 28 percent lower than the projected estimates because of the increased area dedicated to cultivation of maize, particularly in parts of Juba.

Farming activities since late March 2012 for the off-season (harvesting, transporting and threshing) and the current *Gu* 2012 season (land preparation, planting, irrigation, canal rehabilitation) have created job opportunities for poor households in the South and Northwest. This has led to an increase in daily labour wage rates in the rural areas.

Cereal availability improved in most of the markets in the country. This is attributable to good cereal production in *Deyr* 2011/12 and the off-season as well as the on-going humanitarian assistance efforts across the southern regions. As a result, the local cereal prices sustained a declining trend between January and March. The average maize prices declined in the riverine markets of Shabelle (5-15%) and Juba (20-40%) (Figure 2). Aggregated average sorghum prices have also decreased in Bay (65%), Bakool (45%), Hiran (39%), Gedo (33%) (Figure 3), Northeast (24%) and Northwest (19%) since December 2011. However, a slight increase (4%) is observed in the central regions due to restricted trade movements following armed violence in the area. The yearly comparison indicates a high percentage decline of locally produced cereal prices in March 2012 in the southern regions - Shabelle (45-60%), Juba (28-40%) and Sorghum Belt (58-76%). In the same period, the sorghum prices decreased moderately in Central (15%), increased slightly in the Northwest (4%) while maintaining the same levels in the Northeast.

On-going Irrigation Activity. Bananey Village, Jowhar, Middle Shabelle, FSNAU April 2012.

Figure 2: Regional Trends in Cereal Prices (Juba and Shabelle)

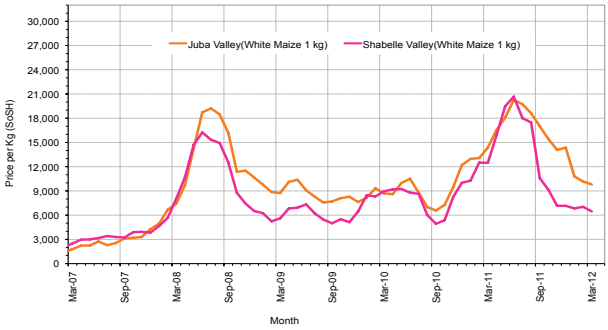
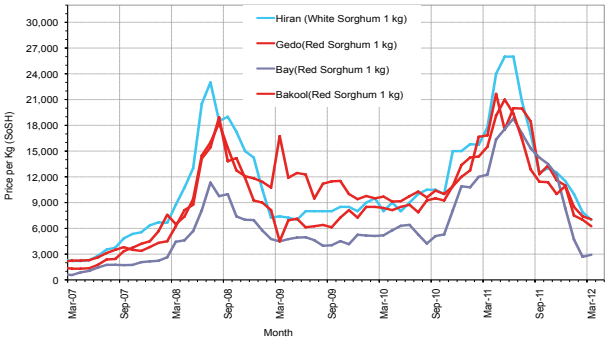


Figure 3: Regional Trends in Cereal Prices (Sorghum Belt)



In March 2012, the lowest maize prices are recorded in the main producing districts of Qoryoley, Marka and Afgoye in Lower Shabelle (4,500-6,500 SoSh/kg - 40-55% of March 2011 prices), while the highest are in Afmadow and Dhobley of Lower Juba (11,000-12,000SoSh/kg - 70-80% of March 2011). The latter is due to the remoteness of these districts from main production areas and due to the restricted trade movement owing to insecurity in the region. The lowest sorghum prices were recorded in the Bay High Potential and Wanlaweyn of Lower Shabelle (2,800Sh/kg – 23% of March 2011) following a good *Deyr* 2011/12 harvest. The highest sorghum prices are in Adanyabal of Middle Shabelle (30,000SoSh/kg – 188% of March 2011), which is a result of low local cereal supplies following several seasons of poor production; hampered trade movements due to prevailing insecurity in the region; and limited humanitarian support.

6 Recessional cultivation is a form of agricultural cultivation during the off-season period, that takes place on a flood plain or depression in a low lying area (*desheks*) when flood water recedes. It depends on residual moisture stored in soil rather than on the surface

LIVESTOCK

Pasture, Water and Livestock Migration

As a result of failed *Hays* rains and delayed *Gu* 2012 rains in parts of northern regions pasture, browse and water availability have further deteriorated. This is found especially in the areas where the recent short rainy season (Oct-Dec '11) was below average. This includes Coastal *Deeh* of Bari, Sool Plateau, Nugaal Valley, Golis/Guban and pockets of Hawd livelihoods in Togdheer and W. Galbeed regions. According to field reports, water trucking has been ongoing since February 2012 in the rural areas of Sool, Sanaag and Bari regions. As a result, water prices are 20-30 percent higher compared to the levels in December 2011. In most of the central and southern regions dry pasture, browse and water are available owing to a mild *Jilaal* season. However, early water trucking is reported in pockets of Addun and Hawd pastoral livelihoods of Central and the agropastoral areas of Lower Shabelle, where *berkads* and natural water ponds have been dry since late February.

Empty Berkads. Sool Plateau, Sanaag Region, FSNAU, March 2012

Livestock migration in the country is largely concentrated within the traditional dry season grazing areas and close to permanent water sources (rivers and wells). The return of livestock in early March to Nugaal Valley, Hawd of Burao and localized areas of Sool of Bari is reported after depletion of pasture in the areas of outmigration (Hawd of Sool, Togdheer and localized areas of Coastal *Deeh* of Bari). Livestock migration was also observed from the Somali region of Ethiopia (Harshin) and the eastern parts of Hawd of Hargeisa towards the agropastoral areas of the Northwest to benefit from crop fodder.

Medium Goat Kidding. Bulo-burti, Hiran region, FSNAU, March 2012

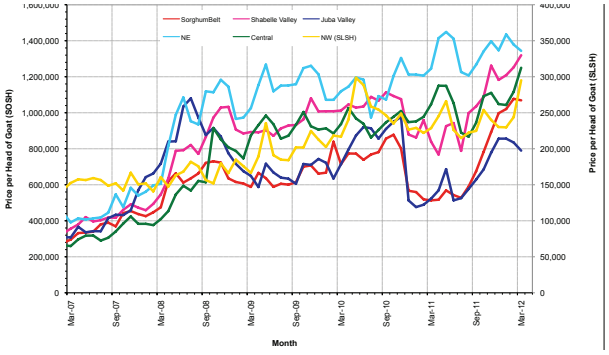
Livestock Conditions, Production and Reproduction

Livestock body condition of all species in central, southern and parts of the northern regions remains average, scoring 3 on a 1-5 scale of the Pictorial Evaluation Tool[7] (PET). However, the livestock body condition deteriorated to below average (PET score of 2) in the livelihoods that experienced poor short rainy season *(see above)*. This was seen particularly among lactating goats and their offspring. Medium-rate kidding and lambing of goats and sheep are reported across the country, although cases of livestock deaths (2-3%) and abortions are reported in upper Nugaal Valley, Sool Plateau of Sanaag and Lower Juba (agropastoral of Jamame district). This is as a consequence of poor feeding and parasitic diseases. Calving of camel (North) and cattle (South) are expected in *Hagaa* (July-Aug). Camel calving in the South is expected in the next *Deyr* season. However, minimal abortions may occur in the event of a poor performance of the *Gu* rainy season. Milk production is very low in most of Somalia because of low calving during the last short rainy season and reduced milk yield of lactating animals during the *Jilaal* period.

Livestock Trade and Prices

Livestock prices followed an increasing trend since December 2011 in most markets. Local quality goat prices increased in Central (19%) and Northwest (28%) although they remained steady in the Northeast. In southern Somalia, goat prices increased in the regions of Shabelle (14%) and the Sorghum Belt (7%). Goat prices in Juba remained unchanged or declined due to hampered trade resulting from armed conflict in the regions. The yearly comparison indicates increases in the local quality goat prices in all markets including Central (19%), Northeast (8%), Northwest (29%), Shabelle (57%), Juba (51%) and the Sorghum Belt (108%). The higher increases in the South are primarily due to the improved livestock body condition compared to the last year's drought (Figure 4).

Figure 4: Regional Trends in Local Quality Goat Prices (SOSH/SLSH)



7 Pictorial Evaluation Tool (PET) - This is a tool used to quantify/standardize evaluations of livestock body condition, by placing sets of photographs of Somali livestock in a range of body conditions scored from 1 (very thin) to 5 (very fat) in a progressive series for each species. This is done rapidly and without touching the body of the livetsock in the field, by the side of the road, markets, backyard e.t.c. It is also used to monitor changes in the same herds and flocks over time; and between similar herds and flocks in different locations

The local quality cattle prices in southern Somalia showed a mixed trend, mostly exhibiting declines in March 2012 compared to December 2011 in line with a seasonal pattern. In contrast, a considerable increase of 18 percent is recorded in Bay region due to improved access and (to a greater extent) increased demand in Afgoye and Mogadishu markets. This increase in access and demand is itself partially due to the re-opening of the main port of Mogadishu. The local quality cattle prices are considerably high compared to the lowest levels during the drought period a year ago (Shabelle - 69%; Juba - 79%; Sorghum Belt - 174%). This is mostly attributable to improved livestock body condition.

According to official port data, about 816,228 heads of livestock were exported from Somalia between January and March 2012. Sixty-seven percent of exports went through Berbera, while the rest was through Bosasso ports (33%). Compared to the same period last year, the livestock exports indicate a 34 percent increase in both ports. Greater capacity of Berbera port, increased supply from Ethiopia and greater demand from Saudi Arabia are among the contributing factors for boosting livestock exports.

MARKETS AND TRADE

Exchange Rate

During the first three months of 2012, the SoSh continued to appreciate against the US dollar (USD) in most regional markets of the country (Figure 5). For instance, in Banadir and Northeast trade catchments, the shilling appreciated by 11 and 17 percent, respectively. Annual appreciation of the SoSh is equivalent to 21-27 percent across all the regional markets. Dealers attribute this change to the increase in dollar supply from the humanitarian community and reconstruction efforts by the development partners.

The SlSh, on the other hand, lost eight percent of its value over the same period. The loss is more significant, equivalent to 20 percent, when compared to a year ago. This is mostly attributable to increased circulation of SlSh in the economy, which is due to the change in government policy,[8] and the recent adoption of the SlSh as the legal tender in Togdheer region[9].

Figure 5: Monthly Exchange Rate for Selected Regions (Sosh and Slsh to USD)

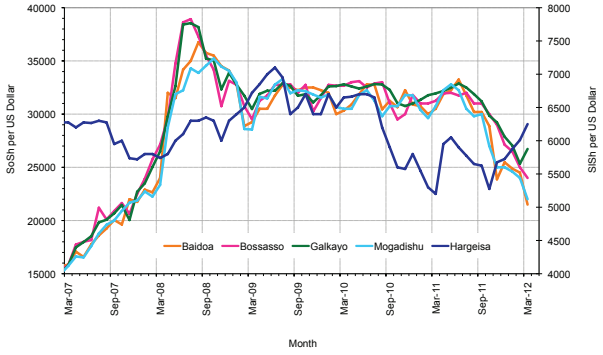
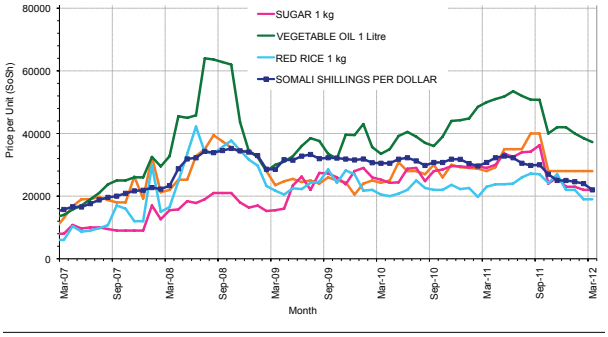


Figure 6: Imported Commodity Prices compared to Exchange Rate, Banadir



Import Commodity Price Trends

In the first quarter of 2012, the amount of cereal (rice, wheat flour and pasta) imports through Bossaso, Berbera and Mogadishu ports increased by 94 percent (276,408 MT) compared with the same period in 2011. This is mostly due to higher cereal inflow through Mogadishu port (82,000MT-150% of Jan-Mar'11cereal imports) attributable to ongoing humanitarian intervention programs (food monetization, food voucher, etc.). However, cross-border cereal flows into the country (Jan-Feb '12) was limited, equivalent to 965MT, compared to outflows that corresponded to 5,344MT.

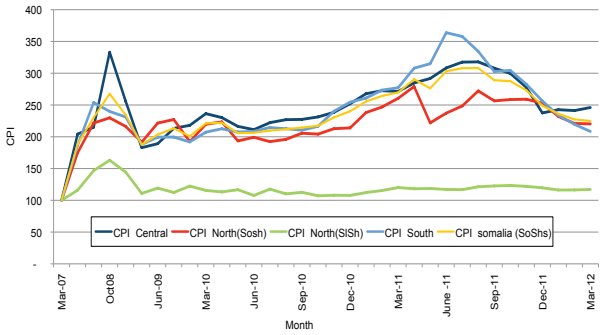
In the same period, prices of all the essential imported commodities (rice, sugar, diesel, vegetable oil and wheat flour) declined markedly in the SoSh areas. This was driven by domestic factors such as: continued relief food supplies in Mogadishu and other regions; increased import flows through Mogadishu port; and strengthening of SoSh against the US dollar. Specifically, in Banadir, whose port serves most of South-Central, the prices of most imported commodities decreased by 3-14 percent (Figure 6). The rate of decline from a year ago is more significant in some regions, especially for rice, sugar, vegetable oil and wheat flour (19-30%); while the diesel price declined by 4-10 percent. In contrast, the global price trends for the first quarter of the year indicate increases for most commodities (*see FSNAU Market Data Update, March 2012*). In January-March 2012, in the SISh zone, the price of rice declined by 17 percent while sugar and wheat flour prices by 8 percent. Conversely, prices of vegetable oil and diesel show substantial increases since a year ago (17 and 10%, respectively).

8 The government introduced VAT payment in 2011, which is collected in local currency
9 Before July 2011, SoSh was the official currency used in Togdheer region

Consumer Price Index (CPI) Trends

The CPI, which is based on the cost of the Minimum Expenditure Basket (MEB), continued on a declining trend in most parts of the country during January - March 2012. This trend is associated with substantial decreases in the price of commodities included in the MEB, such as sorghum, wheat flour, sugar, vegetable oil and milk. Specifically, the index decreased significantly in the South (19%) and Northeast (13%), but only marginally (2%) in the SlSh regions (Figure 7). In the Central regions, slight increases in the sorghum prices and other commodities, including fresh milk, pushed up the CPI by 4 percent. Yearly comparison indicates significant deflation in the South (25%) and other SoSh zones (9-15%) and relative stability in the SlSh zone.

Figure 7: Monthly Trends in Consumer Price Index (CPI)



*Inflation is slowly easing in SoSh regions but stable in SlSh Areas

NUTRITION SITUATION

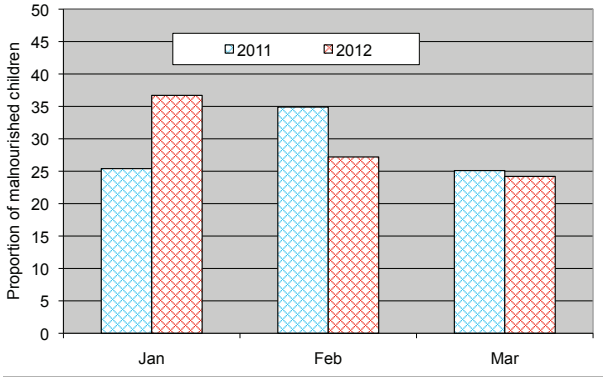
Southern regions

The integrated nutrition situation analysis conducted by FSNAU and partners in January 2012 indicated a sustained ***Very Critical*** situation in all of southern Somalia. Based on the prevailing situation at the time, the historical seasonal trends (which show worrying nutrition levels), disease outbreaks and poor household food access in the dry January –March (*Jilaal*) season, it was projected that the nutrition situation would remain *Very Critical* in February-June 2012 *(Source: Nutrition Technical Series Report, Mar 9, 2012).* Nutrition data from health facilities in Juba, Bay and Bakool regions for the period January to March 2012, indicates a high proportion (15% and above) of visiting children are acutely malnourished (Figure 8). However ,for Shabelle and Mogadishu urban populations, nutrition data from health facilities for the same period, depicts a better situation with 10-15 percent of the visiting children acutely malnourished.

nutrition

According to the World Health Organization's *Health Update* (Somalia Emergency Health Update, 24-30 March), malaria (944 confirmed cases) is currently the leading cause of morbidity with increased incidence reported in Lower Juba, Gedo, Lower Shabelle and Banadir regions. Acute watery diarrhea (AWD) and/or suspected cholera cases (n=589) have also been reported in Middle Shabelle, Middle Juba and Gedo regions. The number of AWD cases across Somalia is expected to further increase in the April-June (*Gu*) season based on historical trends. Household food access in livestock-dependant agropastoral areas remains a challenge following diminished food stocks of the poor households during the lean season; low milk production; and constrained humanitarian access as a consequence of the ban of key humanitarian agencies in the South. Based on this secondary information, the current nutrition situation is ***likely Very Critical***, sustained since January 2012.

Figure 8: HIS Malnutrition trends in Juba Pastoral MCHs (Jan-Mar 2012)



Northern and Central Regions

The nutrition situation is ***likely Serious*** in most pastoral and agropastoral livelihoods of central and northern Somalia, consistent with historical seasonal trends. Household access to milk is the key driving factor in these areas, which is somewhat reduced consistent with the trend during the *Jilaal* dry season. Sporadic disease outbreaks also represent risk factors. In the regions of Northwest, increased incidence of suspected measles (n=140) has been reported by the WHO *Health Update*. The Child Health Days (19-23 February 2012) immunization campaign programme results released by Ministry of Health of Somaliland report high immunization coverage rates of polio (91%), measles (88%), and diphtheria/pertussis/tetanus (DPT) (81%). The Ministry also reports de-worming coverage of 84 percent. Although the rates are below the Sphere 2011 standards, they indicate fair access to health care services, and are likely to mitigate the nutrition situation. WHO and partners continue to monitor the trends across the country, and support AWD preventive activities.

April – July 2012 nutrition survey schedule

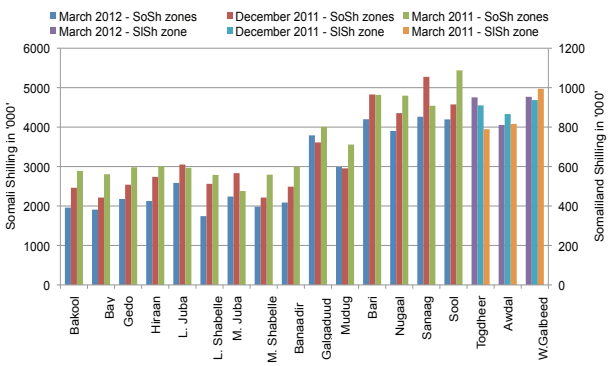
FSNAU and partners are currently (April 2012) conducting nutrition surveys in Mogadishu urban and IDP populations. The results of the April surveys will be disseminated through the March-April 2012 Nutrition bulletin scheduled for release in early May. The countrywide nutrition surveys will be undertaken in May-July 2012.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In post-*Deyr* 2011/12, urban food security improved markedly compared to the previous season due to significant decreases in food prices and the cost of living of the urban poor. However, 550,000 people or nearly one-fifth of the total urban population, remain in acute food insecurity phases of **Crisis** and **Emergency**. In January-March 2012 food prices showed a further decline in most areas, which is also reflected on the reduced cost of the MEB (Figure 9). The cost of the MEB declined significantly in the South, particularly in Lower Shabelle (32%) while in the North, the decline was equivalent to 11-12 percent. The MEB cost remained stable in the urban areas of Central. In March 2012, the cost of the MEB by zones was as follows: SoSh 2,087,925 in Mogadishu, SoSh 2,144,101 in other regions of the South; SoSh 3,469,542 in Central; SoSh 4,140,154 in North SoSh areas; SlSh 882,182 in the North SlSh areas. The yearly comparison indicates a reduced cost of the MEB across the country (South-26%, Central-11% and North-15%), which is primarily driven by decrease in food prices. The decline in the price of the cereals had a particularly marked effect because of its high share (30-40%) in the food basket *(see Market Section)*.

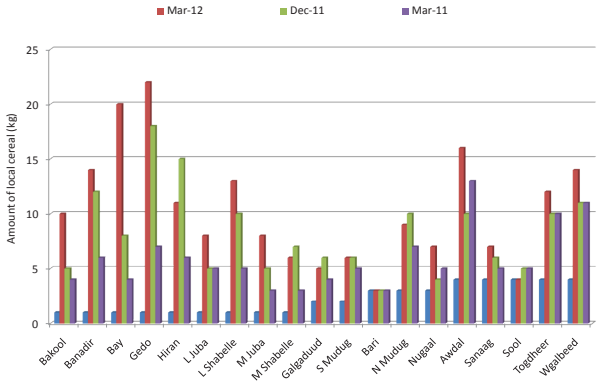
Figure 9: Cost of MEB by Region (March 2012)



The labour wage rates exhibited a mixed trend across the country. In the first quarter of the current year, unskilled labour wages remained stable or slightly increased (6-9%) in most regions of the South, except for Bay, Gedo and Hiran where slight reductions were recorded due to insecurity. The highest wage rates in the South are in Banadir (SoSh103,000) and Gedo (SoSh 155,500) where trade and cross-border activities are relatively higher, while the lowest are in Bay (SoSh 60,000) and Bakool (SoSh 62,500). In Central and North SoSh areas, wages rates remained relatively stable although with some variation among the towns in the North. In the North SlSh zone, wages decreased in Awdal (SlSh32,500), while a moderate increase was recorded in Togdheer and W.Galbeed at SlSh35,000 and SlSh40,000, respectively.

As the cereal prices continue to fall, the purchasing power of the urban poor households largely improved in January-March 2012. This is reflected in increased ToT between cereals and daily labour wage rate in most parts of the country (Figure 10). Specifically, in the South, ToT increases were as follows: Banadir (17%), Gedo (22%), Shabelle (22%), Juba (80%), Bakool (100%), Bay (150%) and Hiran (9%). Similarly, in Central the ToT (labour/red sorghum) increased by 20 percent in Galgaduud, while it remained unchanged in South Mudug. ToT (labour/rice) increased in the Central by 33 percent due to a decline in rice prices in the local market owing to increased humanitarian food supplies and flow of local cereals from the southern regions. In the urban areas in the North, the ToT levels have improved or remained stable. Specifically, in the Northeast ToT (labour/ sorghum) increased in Nugaal (75%), while it remained stable in the Bari region. In the Northwest, an increase was recorded in Sanaag, Togdheer and W.Galbeed (16-27%) and Awdal (60%). However, the ToT in the Sool region fell by 20 percent because of the ongoing conflict in the area *(see Civil Insecurity Section)*. The ToT (labour wage/rice) in the North indicate an average increase of 20 percent in the North SoSh zone and 33 percent in North SlSh zone. The ToT labour to cereals in most markets of the country are showing an increase when compared to same time last year.

Figure 10: Trends in Terms of Trade by Region Compared to Dec 2011 and March 2011



Although the trends of food security have been positive since *Deyr* 2011/12, the below average *Gu* 2012 rains (according to forecasts) in most of parts of the country should affect food production, which will be reflected in food prices and the cost of living. The urban food security will also be largely determined by security situation, which currently remains volatile. However, the food security is likely to improve in Mogadishu given positive development in terms of improving economic conditions, ongoing infrastructural development and the presence of humanitarian assistance. FSNAU in collaboration with WFP is currently carrying out urban/IDP food security survey in Mogadishu. The findings will be reported in March-April 2012 Nutrition bulletin scheduled for release in early May.

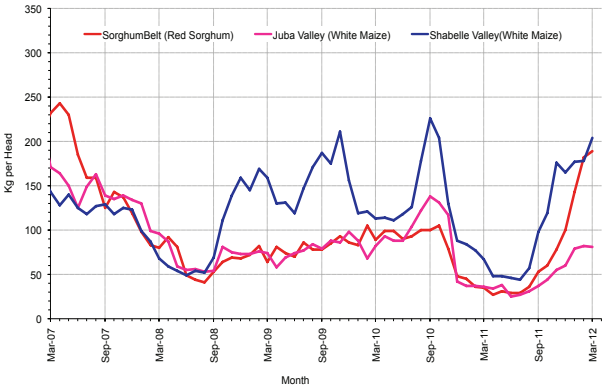
RURAL

Southern Regions

The food security situation in the rural areas of southern regions improved significantly during the post-*Deyr* 2011 period as a result of positive impact of good *Deyr* season and increased humanitarian interventions. However, an estimated 900,000 people still remain in acute food insecurity phases of **Crisis** and **Emergency**. As projected earlier, the *Jilaal* period has been mild. It was marked by falling cereal prices, improved labour wages, off-season crop production, high kidding rates, increased livestock prices, normal livestock migration and increased fishing in the *desheks* of the Juba riverine. The cereal stocks of poor households from *Deyr* 2011/12 harvest are available until June-July in Bay High Potential livelihood, Lower Shabelle riverine and parts of agropastoral areas of Shabelle regions (Wanlaweyn and Balad). The *Deyr* stocks are sufficient to last until the end of May in Hiran, Middle Shabelle riverine, agropastoral of Sakow (Middle Juba), agropastoral of Jowhar (Middle Shabelle) and Bardhere (Gedo). Following the good off-season maize harvest, the stocks are estimated to last until July 2012 in Jammame (Lower Juba) and up to June in Jilib (Middle Juba). However, in all other areas the stocks are already exhausted.

Canal Rehabilitation. Kallundi Village, Jowhar, Middle Shabelle, FSNAU, March 2012

Figure 11: Regional Trend in Terms of Trade, Cereal to Goat



In January-March 2012, the ToT (cereal/labour wage) improved across the southern regions as a result of reducing cereal prices and improved labour wages due to increased farming activities (off-season and *Gu* planting). For instance, the ToT increased in Juba (9kg/daily labour - 80%), Sorghum Belt (19kg/daily labour - 46%) and Shabelle (11kg/daily labour - 22%) in March 2012 when compared to December 2011. The ToT in March 2012, represents a significant overall improvement compared to the rates of 4-6kg/daily labour during the last year's drought.

In January-March 2012, the local quality goat prices increased in the regions of Shabelle and Sorghum Belt due to the improved livestock body condition and stocking of live animals by traders for the coming *Ramadan (see Livestock Sector)*. The local goat prices are considerably higher compared to the levels a year ago (Juba and Lower Shabelle - 30-60%; Hiran - 90%; and over 100% in all other regions). Similar annual trend is observed for local quality cattle prices across southern regions. In the first quarter of 2012, the local quality cattle prices have been stable to increasing in the Shabelle and the Sorghum Belt, while declined in Juba regions due to disrupted access to Garissa market because of on-going conflicts. In March 2011, ToT goat to cereal increased compared to December 2011 in Shabelle (24%); Juba (35%) and the Sorghum Belt (85%) (Figure 11).

Central Regions

In post *Deyr* 2011/12, the food security situation showed some improvements in all livelihoods, primarily due to positive impact of a good *Deyr* season. However, 125,000 people in rural areas are still classified in **Crisis** and **Emergency.** Cowpea Belt and most parts of Addun livelihoods remain in **Crisis**, while Coastal *Deeh,* which has suffered from significant livestock losses in the previous drought periods, is still in **Emergency**. During the *Jilaal* dry season, the key pastoral livelihoods of Hawd and Addun experienced an acute water crisis forcing pastoral households to resort to costly water trucking. Some pastoralists have moved closer to permanent water sources. Available pasture is limited and of low quality but sufficient to last until the normal onset of *Gu* rains. However, these rains were reported as starting only in localized areas of Coastal *Deeh* and Cowpea Belt livelihoods in the second dekad of April. Despite deteriorated pasture conditions, the livestock body condition remained average in all the livelihoods. However, milk production has declined due to the reduced quality of available pasture and low camel calving rates in last *Deyr*.

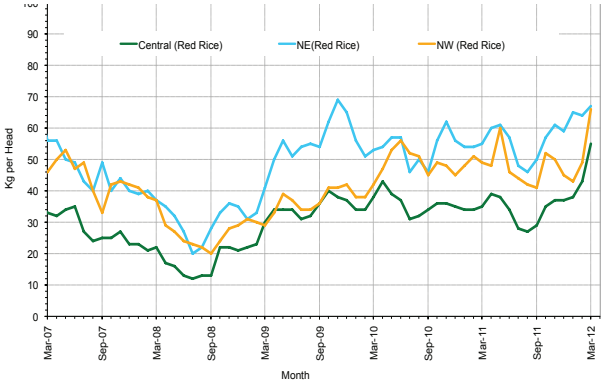
Cereal stocks of the poor households in the Cowpea Belt were depleted during *Jilaal;* they currently access food through market purchase (in cash or credit) and gifts. In January-March 2012, the local quality goat prices increased by 14-20 percent in all the livelihoods. This is attributable to increased demand from the on-going live animal stocking by traders for the coming *Ramadhan* period (June-July). Increased goat prices and reduced rice prices resulted in a significant improvement of ToT between local quality goat and rice (Figure 12). The ToT between rice and goat improved significantly (64-74%) in most markets in March 2012 compared to December 2011 and currently is equivalent to 60-75kg/head due to decrease of rice prices (21%) and increase of local quality goat prices (20%). Additionally, in the areas where security situation is particularly tense (Elder and Dhusamareb) the ToT has increased moderately (20%) and currently stands at 39-59kg/head. Similarly, an increase is discerned in the annual comparison (about 60%), which is a result of reduced rice prices and increased livestock prices. ToT of red sorghum to goat has also increased by nine percent (76kg/head) in Hawd/Addun and 29 percent (103kg/head) in the Cowpea Belt/Coastal *Deeh*.

Loading Livestock for Export. Dusamareeb, Galgadud Region, FSNAU, March 2012

Northern Regions

In the post-*Deyr* 2011/12 season, 135,000 people are identified in acute food insecurity phases of **Crisis** and **Emergency**, which is 46 percent lower than the previous season (*Gu*'11). Over the *Jilaal* period, rangeland and water resources have degraded in most livelihoods. The most affected are upper Nugaal, parts of Sool Plateau and Golis/Guban, where the *Deyr* 2011 rains were below normal. As a consequence, early water trucking (since Feb. '12) is reported in these livelihoods. Medium kidding and lambing of goat and sheep occurred in most of the livelihoods in this *Jilaal* period. However, cases of livestock deaths and abortion are reported in upper Nugaal Valley and Sool Plateau of Sanaag owing to poor feeding. The worst affected animals are the lactating goats and their offsprings. The livestock body condition in the above-mentioned rain deficit areas deteriorated from average to below average (PET score of 2) because of the degraded rangeland conditions. Milk production is currently is very low due to low calving in *Deyr* 2011/12 and reduced milk yield as a result of poor pasture conditions. However, camel calving and increased milk availability is expected during *Hagaa* (July-Sep) in Hawd, Addun, Golis and Karkaar/Dharoor. If the *Gu* 2012 rains perform poorly, abortions are likely but the actual number of abortions will likely remain low.

Figure 12: Regional Trend in Terms of Trade, Cereal to Goat

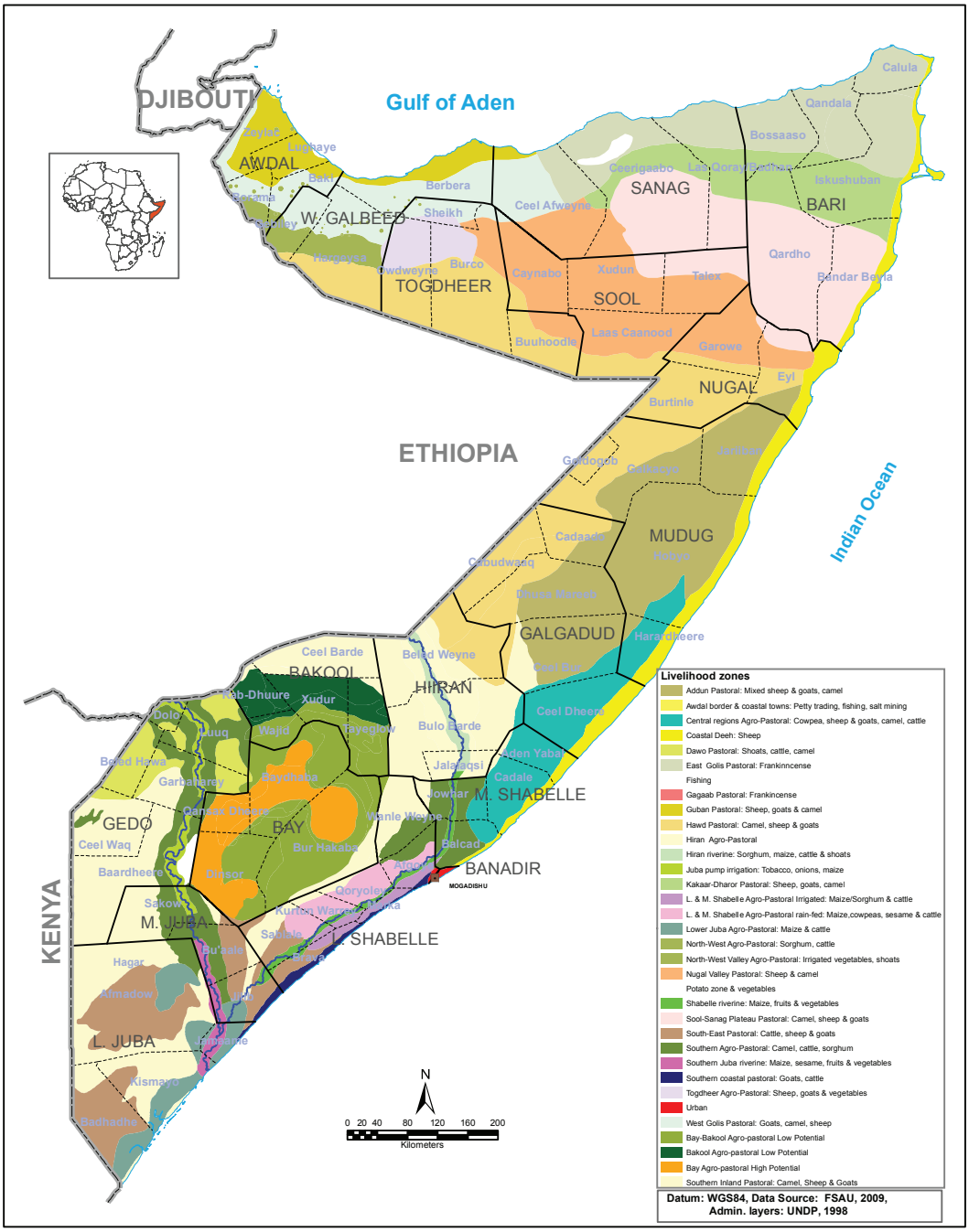


In March this year, the local quality goat prices increased by 28 percent in the Northwest while remained stable in the Northeast compared to December 2011. The annual comparison indicate a significant improvement in the Northwest (29%) while marginal in the Northeast (8%) due to higher demand for livestock in the Northwest markets given higher exports through Berbera port. The purchasing power of the population improved due to an increase in the local quality goat prices and a decline in the rice prices this *Jilaal*. For instance, in the first quarter of this year, the ToT between rice and local goat in W.Galbeed and Togdheer regions increased by 80 percent and currently stands at 81 kg/head (March '12), representing about a month of cereal supply for a pastoral family. The ToT in other areas increased by 20 percent and is equivalent to 54kg/head on average (Figure 12).

Water Trucking. Qardho, Bari region, FSNAU, March 2012

FSNAU
Information for Better Livelihoods

SOMALIA: LIVELIHOOD ZONES



Recent and forthcoming publications and releases

FSNAU March - April Nutrition Update (Forthcoming), May 2012
FSNAU March Climate Data Update, April 2012
FSNAU March Market Data Update, April 2012
FSNAU Technical Series Report Post Deyr 2011/12 Nutrition Situation, March 2012
FSNAU Technical Series Report, Post Deyr 2011/12 Analysis, March 2012

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