

KEY ISSUES

According to the post-*Deyr* 2013/14 seasonal assessment results, in February-June 2014, an estimated 857 000 people are classified in **Crisis** and **Emergency** acute food insecurity phases based on Integrated Phase Classification (IPC). In addition, the results of recent nutrition surveys among rural populations and Internally Displaced Persons (IDPs) of Somalia (issued by the FSNAU in January 2014), found high rates of acute malnutrition across the country, with a total caseload of 203 000 malnourished children under-five. The estimates of population in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) are likely to remain unchanged through June 2014 as shown by the results of the FSNAU's recent rapid field assessments (in March 2014) and a monthly monitoring of food security indicators.

- The *Gu* rainy season started effectively from mid-April in parts of the South and the Northwest following *Todob* rains that precipitated in March in many livelihoods of Somalia. Conversely, lack of rainfall is reported in most parts of the northeastern and central zones of the country and the dry conditions are projected to sustain in these zones up to the end of April. Conversely, good rains are expected in most livelihoods of the Northwest and the South in the last week of April. At this time, rangeland conditions are average in most parts of the country. However, further delays in *Gu* rains in the northeastern and central zones may cause rapid deterioration of pasture and water and trigger an abnormal livestock migration, thereby affecting access to milk by poor households, especially by women and children.
- Early *Gu* planting started in most parts of the South as from March 2014, although the intensity of cultivation has been relatively low in conflict-affected areas of Lower Shabelle and Hiran regions. Based on rainfall outlook for the last week of April, no rains are expected in rain-fed agropastoral areas of Middle Shabelle and Hiran, which may necessitate crop replanting in these areas. However, good rainfall projected in other parts of the South will support crop development. The *Gu* harvest will largely depend on rainfall amounts and distribution, particularly in April/ May. Poor households in most agricultural livelihood zones of the country have already exhausted cereal stocks from the recent *Deyr* harvest and will rely on market purchases of cereals until the next *Gu* harvest, expected from July to August. Cereal prices exhibited increases in most markets in the first quarter of the year and are significantly higher than in the same period last year, yet remaining below the five-year average levels (March 2009-2013).
- Armed conflict that started in March 2014 in South-Central zone of the country caused losses of lives and population displacements. Based on recent estimates by the United Nations High Commissioner for Refugees (UNHCR) for Somalia, an estimated 50 000 people have been displaced internally within the country over the past three months, primarily due to insecurity. Additionally, the conflict has affected intensity of planting activities, particularly in parts of Lower Shabelle and Hiran regions, while a trade embargo imposed by insurgents in Bakool region resulted in a significant monthly surge in food prices in Huddur town in March 2014. However, the consumer price index (CPI) shows a marginal increase at the national level in the first quarter of 2014, although it rose moderately (by 6-9%) on an annual basis in South-Central parts of the country, while remaining stable in the North.
- For January to March 2014, data from most of the health facilities monitored by the FSNAU indicate stable trends of admission of acutely malnourished children under-five. In this period, admission rates of acutely malnourished children varied from high (>20%) to very high (>30%) in southern regions. The rates were relatively lower (from <10% to >15%) in most sites in the North and Central. The cases of acute watery diarrhea reported in southern regions and measles outbreak in northern and central regions may aggravate nutrition situation in the country.
- Humanitarian assistance, geared towards treatment of malnourished children, improved access to food, social safety nets and livelihood support is needed, at least, until the next *Gu* harvest in July-August.

Climate

Markets

Nutrition

Agriculture

Livestock

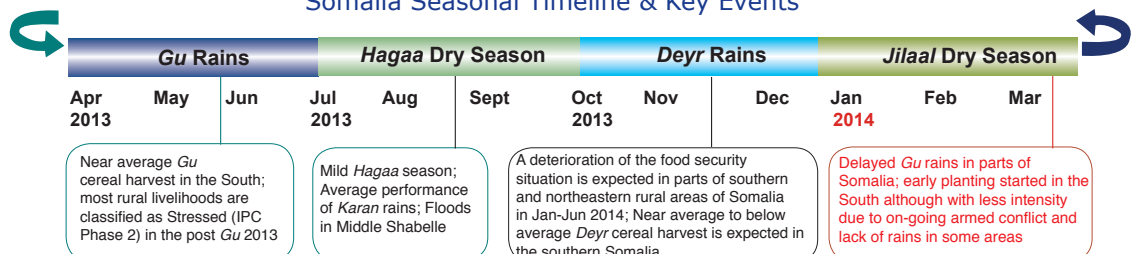
Civil
Insecurity

Emerging
Regional
Issues

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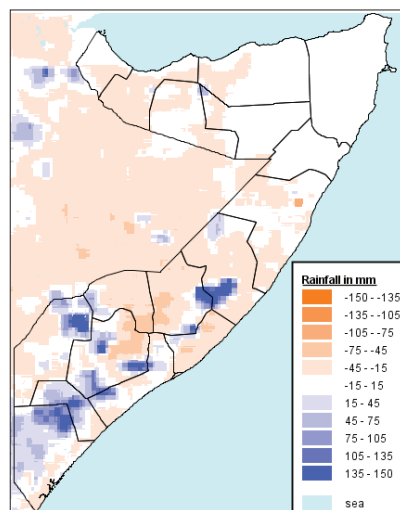
Somalia Seasonal Timeline & Key Events



SECTOR HIGHLIGHTS

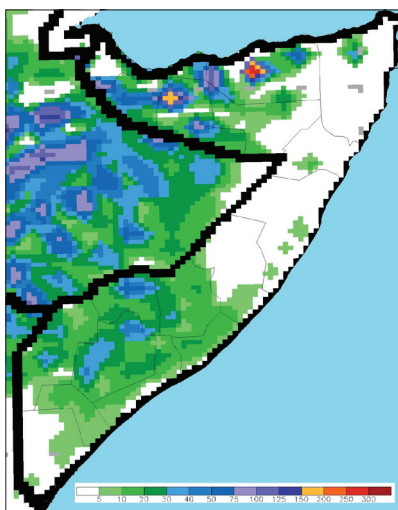
CLIMATE

Map 1: RFE Anomalies (mm):
11-20 April, 2014



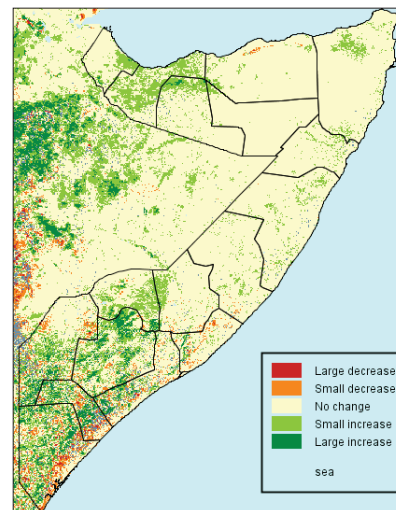
Source: NOAA

Map 2: Rainfall Forecast (mm):
23-29 April, 2014



Source: NOAA

Map 3: SPOT NDVI Anomalies:
11-20 April, 2014



Source : SPOT

Rainfall Performance

The recent *Jilaal* dry season (January – March 2014) was relatively drier than normal with high temperatures prevailing in most livelihoods of the country. Between January and February, most of the country remained dry as expected; this information was confirmed by rain-gauge stations, field reports as well as the satellite-derived rainfall estimates (RFE). The exceptions are localized moderate *Hays* rains that fell in the second dekad of February 2014 in Coastal *Deeh* of Calula and Iskushuban districts of Bari region and in the Guban Pastoral of Northwest regions.

In late March, ‘Todob’ rains (a short 7-day rainfall preceding *Gu* rainy season) precipitated in many parts of the country with mixed performance in terms of amounts, frequency and distribution. In the South, most parts of Lower and Middle Juba, Bay, Bakool and southern part of Gedo regions received light to moderate rains during the last dekad of March, while in the rest of the South rains fell only in localised areas. In Central, patchy rainfall occurred in parts of Cowpea Belt of Galgadud region. In the North, average rains were received in some parts of Hawd, Golis-Guban and Nugal valley livelihoods, while light to moderate rains fell in pockets of Sanag region; the rest of the northern livelihoods remained dry.

In April, field reports and satellite imagery indicate light to moderate rains of between 10-75 millimetres (mm) in most of the southern regions. However, the rainfall was poor in most parts of central and northern regions of the country during this period. The rainfall estimate for April 11 - 20, 2014 shows poor rains compared to the 1920 to 1980 long-term mean (LTM) of the same period in most parts of the country, with the exception of Juba and Bay regions, which received above normal amounts of rains (Map 1).

Based on the rainfall forecast issued on February 28, 2014 (Greater Horn of Africa Climate Outlook Forum) there is an increased likelihood of near normal to above normal *Gu* rains (March-May) with delayed onset and dry intervals across Somalia. According to the National Oceanic and Atmospheric Administration (NOAA) National Weather Service’s (NWS) one week forecast (23-29 April, 2014) for the Horn of Africa, an estimated amount of 5-30mm rains is expected in most of the Bay, Bakool and north Gedo regions as well as in parts of agropastoral areas of Lower Shabelle (Kurtunwarey, Qoryoley and Sablale districts) and Middle Juba (Sakow) regions. The rains are projected to intensify in western parts of Northwest regions as well, while most of Central and Northeast are expected to remain dry (Map 2).

Vegetation Conditions: The satellite derived Normalized Difference Vegetation Index (NDVI) for the second dekad of April depicts normal vegetation in most of key pastoral areas in the North and Central (Map 3). This is a result of mostly normal to above normal *Deyr* rains in the above areas. Vegetation improved in most of the South and in parts of Cowpea Belt (Galgadud region) of Central zone attributed to the start of the *Gu* rains.

CIVIL INSECURITY

Events (political, clan conflicts)

In the first quarter of 2014 (January-March) incidences of violence (suicide bomb explosions, land mines, targeted killings, and armed confrontations) purported by the insurgents have continued in the southern regions, particularly in Banadir, Hiran, Gedo, Bakool, Lower Juba and Shabelles. Most of these incidences were directed at the Somalia's Federal Government officials and their sympathisers, while scores of civilians were injured or killed. On its part, from around the second week of March, the Government of Somalia together with its allied African Union Mission in Somalia (AMISOM) forces has intensified military offensive against the insurgents' strongholds in Bakool (across all districts except Elbarde), Gedo (Burdhubo district), Galgaduud (Elbur and Elder districts), parts of Lower Shabelle (Qoryoley district) and Hiran (Bulo-Burti district) regions. On the other hand, resource-based clan conflicts in Shabelle and Central regions have diffused but tensions still exist.

According to the UNHCR-Somalia estimates, about 50 000 people have been displaced internally within the country during the first quarter of 2014 (Figure 1). The on-going military offensive and threats from the insurgents represented the main reason of displacement (21 700 people). The other causes of displacement included forced returns, mainly due to deportation of Somali migrants from Saudi Arabia (11 000), IDP returns to their habitual residence (9 000), cross border movements (5 000) and lack of livelihood, clan conflicts and evictions (3 533) [Figure 2]. Currently, UNHCR estimates 1.1 million IDPs in Somalia, with the major concentration (893 000) in South-Central regions.

The on-going conflicts resulted in losses of lives and property, displacements, hampered agricultural activities in parts of the South (Lower Shabelle, Bulo-Burti, Jalalaqsi, Hudur, Wajid and Buurdhubo) and disruptions in trade and market activities in South-Central. Trade embargo imposed by insurgents in government-controlled areas (Hudur, Wajid, Bulo-Burti, Qoryoley, Elder and Elbuur districts) resulted in increased prices of essential food commodities and the overall cost of the minimum basket (CMB) in the mentioned districts. For instance, a considerable monthly increase in food commodity prices is recorded in Hudur market of Bakool region. In March 2014, the red sorghum price increased by 25 percent month-on-month, while the prices of other essential imported food (rice, wheat flour, sugar, vegetable oil) increased in the range of 40-50 percent.

According to the Somalia Food Security Cluster information, there are planned humanitarian interventions (targeted towards improved access to food, safety nets, livelihood assets and livelihood investments) for April-June 2014 in all regions of Somalia. However, based on the Office for the Coordination of Humanitarian Affairs (OCHA) for Somalia (Flash Update, 7th April 2014), insecurity poses challenges to deliver humanitarian aid, especially in southern and parts of central Somalia where urgent humanitarian assistance remains a major priority.

Figure 1: Monthly Population Displacements: January-March 2014

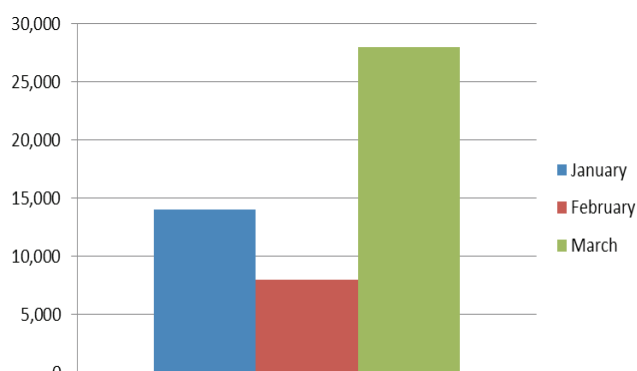
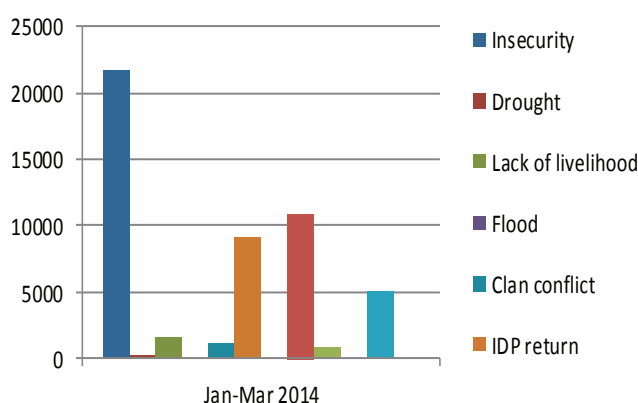


Figure 2: UNHCR data for Somalia: Displacement by reasons for January-March 2014



Source: <http://data.unhcr.org/horn-of-africa/country.php?id=197>

AGRICULTURE

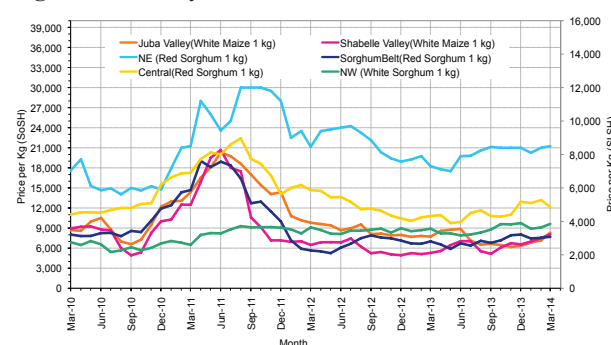
In late March 2014, FSNAU undertook a rapid assessment in southern Somalia to assess the *Jilaal* dry season impact on livelihoods; *Gu* seasonal agricultural activities and *Deyr* 2013/14 off-season cereal harvest. According to the assessment results, an estimated 5 000 tonnes of off-season maize was harvested in the riverine livelihood zones of Juba and Shabelle regions in late February-March 2014 (Table 1). The harvest is 24 percent lower than the preliminary forecast made during the *Deyr* 2013/14 assessment. This is ascribed to heavy winds during mid-February to early March and severe moisture stress at the grain filling stage, particularly in Middle Juba region as well as the effects of insect and wild animal damages in most regions. Moreover, about half of the off-season crops in Lower Juba were sold as a fodder due to its higher value and demand from the urban centres where livestock is mostly hand-fed during the *Jilaal* dry season.

The *Gu* 2014 season agriculture activities (land preparation and planting) commenced in most agropastoral areas of southern regions from the last dekad of March. The early planting of sorghum and cowpea was prompted by unusual rains received in March in Bay and Bakool regions. Development and growth of the crops is subject to *Gu* rainfall performance in April/May. Commencement of *Gu* farming activities has also been reported in the riverine zones. However, agricultural activities have been minimal in conflict-affected areas of Lower Shabelle (Qoryoley and Barawa districts), Hiran (Bula-Burti and Jalalaqsi) and Gedo (Burdhubo and Luuq) regions due to on-going fighting between the government and insurgents that resulted in temporary displacement of many riverine farmers from the key producing areas. Input constraints (seed, tractor availability, etc.) and soaring fuel costs that have been reported in some regions (Gedo, Lower Shabelle, Hiran) may also affect cultivation rate in this *Gu* season. In agropastoral areas of Northwest (Awdal and Waqooyi Galbeed regions), land preparations activities have begun at a normal pace with the start of the *Gu* rainy season.

Table 1: *Deyr* 2013/14 Off-Season Maize

Region	Maize planted areas (in hectares)	Maize harvested areas (in hectares)	Production (tonnes)
Lower Juba	2 000	1 000	500
Middle Juba	3 000	3 000	1 000
Lower Shabelle	3 000	2 500	1 500
Middle Shabelle	2 500	2 500	2 000
Total	10 500	9 000	5 000

Figure 3: Monthly Trends in Local Cereal Prices



Cereal prices indicate a mixed picture across the country (Figure 3). In the first quarter of this year (January - March 2014), maize prices increased significantly in the riverine markets of Juba (15-40%) and Middle Shabelle (50%). In March 2014, the lowest maize prices in Somali Shilling (SoSh) areas, in the range of 5 080-5 900 SoSh/kg, were recorded in the riverine areas of Lower Shabelle (Qoryoley) and Lower Juba (Jammame), while the highest (11 000-12 000 SoSh/kg) prices prevailed in distant markets of Afmadow, Dhobley and Hagar districts of Lower Juba.

Sorghum prices have exhibited mild increases (5-7%) in Bakool and Gedo although they reduced slightly (7%) in Bay region in January-March 2014. The price of this commodity showed a mixed pattern in the main markets of North and Central regions: stable in Bossaso; increase in Garowe (10%); and decline (11%) in Galgadud and Mudug regions. In the Northwest, white sorghum prices have been stable since January 2014 in most markets. In March 2014, the lowest sorghum prices were recorded in the markets of the major sorghum producing region of Bay (3 000 - 3 200 SoSh/kg), while the highest prices (22 500- 23 000 SoSh/kg) were in Garowe (Nugal region) and Adan-Yabal (Middle Shabelle). The latter is characterized with limited local production and lack of humanitarian access due to prevailing insecurity in the region.



Maize off season harvest. Riverine, Jowhar district, M. Shabelle Region, FSNAU, March 2014

The annual comparison (March 2013 to March 2014) shows increases in maize prices in the markets of Shabelle (by 39-56%) and Middle Juba (by 17%) regions. For red sorghum, annual price changes reflect moderate increases in Gedo (by 10%), Central (by 12%) and Northeast (by 11-22%) regions and a considerable increase in Bay region (by 52%). The latter is a result of high demand from the neighbouring cereal-deficit regions (Juba, Hiran) as well as better access to the main consumer markets in Banadir compared to last year. The local cereal prices are lower than five-year averages (2009-2013) in most regions.

LIVESTOCK

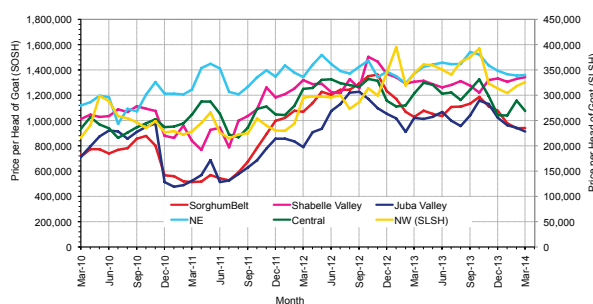
Pasture, Water and Livestock Migration

The impact of the *Jilaal* dry season (January-March) on pastoral livelihoods of the country was mild due to predominantly normal to above normal *Deyr* 2013 seasonal performance, normal *Hays* rains in Golis/Guban, off season rains during March and onset of *Gu* 2014 rains in some parts of the country. The pasture conditions in most of the key pastoral and agropastoral areas have not deteriorated significantly over the *Jilaal* period, including the locust-affected areas in Golis highlands. However, berkads and the natural water ponds have dried up by late February in the areas where performance of *Deyr* 2013 rains was below normal, particularly in Gebi/ Sool Plateau livelihood of Sanaag, Sool and Bari regions and Lower/Middle Shabelle agropastoral. As a result, between January-February 2014 the price of a 20 litre jerrican of water increased by 10 percent in the rural markets of Gebi/ Sool Plateau of Sanag and by 45 percent in rainfed agropastoral of Lower Shabelle. In other areas, water prices remained stable as rural market data collection points are located at water points (boreholes and river). Livestock migration has been normal for most parts of the country, mostly within the original livelihood zone and into the adjacent areas with better pasture and water, or from hinterland to water points. For example, cattle herders from agropastoral areas (both from inland as well as the coast) of Lower Shabelle and Southeast Pastoral of Juba regions migrated to riverine areas. However, with the start of *Gu* rains livestock will likely to return back to wet season grazing areas in their original livelihood zones.

Livestock Condition, Production and Reproduction

In most of the pastoral and agropastoral livelihood zones across the country, livestock body conditions remained average or near average (Pictorial Evaluation Tool [PET] score of 3 on a 1-5 scale). However, in the livelihood zones where *Deyr* 2013 rainy season performance was below normal (Southeast Pastoral and Southern Inland Pastoral [SIP] livelihoods of Juba and Gedo regions; pockets of agropastoral areas in Lower and Middle Shabelle; agropastoral of Beletweyne district of Hiran; pockets of Addun, Hawd and Coastal *Deeh* livelihoods of Central; Gebi Valley/Sool Plateau of Sanag), the body condition of lactating cattle/goats deteriorated to below average (PET score of 2). At the end of *Jilaal* (March) season, conception of all species was seasonally low across the country. However, medium kidding/lambing of goat/sheep and low to medium calving of camel is expected across the country following medium to low conception in the previous rainy seasons (*Deyr* 2013 and *Gu* 2013, respectively). Cattle calving already started in March 2014 at a medium rate in the South and Northwest where large cohorts of cows conceived in July 2013. Consequently, milk availability is anticipated to increase gradually as the *Gu* season progresses. In the cyclone-affected areas (Bandar Beyla, Danagoroyo and Eyl districts) access to sellable animals remains poor, while milk production for household consumption and sale is also low.

Figure 4: Regional Trends in Local Quality Goat Prices (SoSh/SlSh)



Average camel body condition. Qardho, Bari Region, FSNAU, March 2014

Livestock Trade and Prices

Livestock prices exhibited mixed trends in most parts of the country in the first quarter of the year. Local quality goat prices increased (by 3-7 percent) in most markets of central and northern regions, while they declined in most southern markets due to trade disruptions stemming from prevailing insecurity. A yearly price comparison indicates declines in the Northwest (by 5%), Central (by 11%) and a relative stability in the Northeast and the South (Figure 4). Between January-March 2014, local quality cattle prices showed an increase in most markets of southern Somalia and a slight decline (by 3%) in the Northwest. Cattle prices rose on an annual basis across these zones, with the exception of Hiran region where they declined (by 15%) due to increased livestock supply from agropastoral of Beletweyne. Most notably, cattle prices increased in Gedo region (46%) due to reduced supply to isolated markets on the account of prevailing insecurity.

MARKETS AND TRADE

Exchange Rate Trends

From January to March 2014, the SoSh indicated gains against the U.S. dollar (USD) due to gradual improvement in investments resulting in higher dollar inflow into the market, particularly in Mogadishu. March 2014 exchange rates indicate that one USD was traded at around 18 000 SoSh, reflecting a 10 percent gain from January 2014. However, the SoSh lost about 13 percent in value over the past year due to stabilization efforts by the Central Bank of Somalia to counteract drastic appreciation of the local currency. Over the two reference periods, the Somaliland shilling (SiSh) to USD exchange rate was relatively stable across most markets of the SiSh-using area.

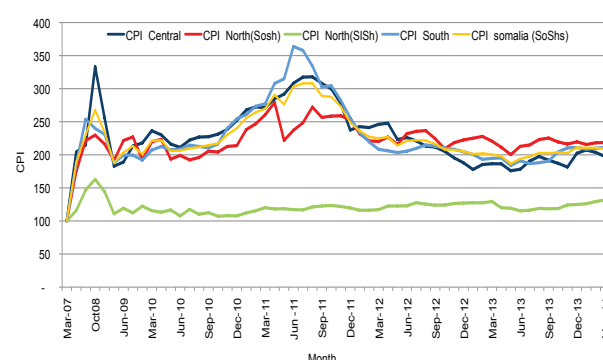
Cereal Imports and Commodity Price Trends

In the first quarter of the year, in the SoSh-using areas, including Banadir, Central, Northeast, Juba and Shabelle Valley and Sorghum Belt trade basins, the average prices of most of the essential imported commodities such as rice, wheat flour, diesel fuel, sugar and imported vegetable oil, remained stable or declined modestly. The exception is Bakool region where prices of all of these commodities increased due to prevailing insecurity (*see Civil Security section*). The average annual price changes from March 2013 indicate that the prices of these items in most of the above-mentioned areas have fallen between five and 15 percent. Declining or stable international prices of rice, wheat flour, vegetable oil, sugar and diesel due to favorable global production prospects as well as strong shilling have contributed to reduced domestic prices of these commodities. However, in Lower Shabelle main markets prices were adversely affected by the ongoing military confrontations disrupting supply routes from Mogadishu as well as multiple roadblocks and 'taxes'. For example, retail prices of food commodities in the main Qoryoley market were on average 10-25 percent higher than in March 2013. Imported commodity prices were relatively stable in the SiSh zone over the last three months as well as the past one year. Compared to the five-year averages (2009-2013), prices declined in all SoSh areas but rose modestly in SiSh areas.

Consumer Price Index

The CPI for main markets, measured through the changes in the CMB, was stable in the first three months of the year (January-March 2014) in most parts of the country. The CPI has not changed much in the Northern zone over the past one year although it has slightly elevated (6-9%) in South-Central Somalia. This trend reflects typical increase in prices of locally produced red sorghum that makes up the bulk of the consumer basket (Figure 5).

Figure 5: Monthly Trends in Consumer Price Index (CPI)



NUTRITION SITUATION

Southern regions

The integrated nutrition situation analysis conducted by FSNAU and partners in January 2014 classified the nutrition situation in Bakool Pastoral, Bay Agropastoral, Beletweyne district, Kismayo IDPs, Dolow IDPs and Dhobley IDPs as *Critical*. On the other hand, nutrition situation in North Gedo riverine, North Gedo Pastoral, North Gedo Agropastoral, Baidoa IDPs and Middle Shabelle and Mataban district (Hiran) was classified as *Serious*. In Lower Shabelle, nutrition assessments could not be done due to prevailing insecurity and the available health facility data was insufficient to classify the nutrition situation in these areas (*source: Nutrition Technical Series Report, March 2014*).

Data from health facilities in Bay and Bakool regions for January-March 2014 reflects a very high (>30 %) stable trend of addition of acutely malnourished children. However, the nutrition situation is expected to improve due to increased access to milk in all livelihoods following early onset of *Gu* rainfall. In Juba, health facility data show high (>20%) and stable trends of acutely malnourished children in both Agropastoral and Riverine livelihoods but an increasing trend is observed in Pastoral livelihood. Health facility data from Middle and Lower Shabelle indicate a high (>20%) and fluctuating trends of acutely malnourished children across livelihoods in the two regions. In addition, field reports indicate a seasonal increase in cases of acute watery diarrhoea in these regions, which is likely to aggravate nutrition situation.



Children in an IDP camp. Shabelle region, FSNAU, 2014

Northern and Central regions

The integrated nutrition situation analysis conducted by FSNAU and partners in January 2014 indicated a *Serious* nutrition situation across livelihoods in Northwest, Northeast and Central Somalia with exception of Sool plateau and Addun in Northeast/Central regions livelihoods, which were in an *Alert* level.

A review of the health facility data and field reports indicate a generally stable nutrition situation across livelihoods in Northwest, Northeast and Central regions, i.e. same levels as in *Deyr* 2013/14. In Northwest, health facility data show low proportion (< 10%) of acutely malnourished children in Sool plateau and East Golis/Gebi, high proportion (>10%) in West Golis/Guban, Hawd and Nugal valley livelihoods and very high trend (>15%) in the Agropastoral livelihood. However, the increasing trend noted in the Agropastoral livelihood is linked to availability of supplies in feeding programme, which attract more people to the facilities. Field reports indicate increased milk access in all livelihoods of Northwest, and the situation may improve further following the onset of *Gu* 2014 rainfall. However, there are sporadic cases of diarrheal diseases, acute respiratory infections and measles reported in Northwest regions, especially in Sool region, which are likely to aggravate the nutrition situation in the affected livelihoods.

In Northeast and Central, health facility data show a generally stable trend in Sool Plateau, Addun and Nugal Valley livelihoods with low proportion (<10%) of acutely malnourished children; on the other hand facilities in East Golis and Hawd livelihoods show high (>10%) proportion of acutely malnourished children. Very high proportion (>15%) trend of acute malnutrition was reported from Coastal *Deeh*. According to the Ministry of Health (MOH) of Puntland surveillance reports, measles outbreak has been reported in most districts since January 2014 with rapidly increasing trends. The increased cases of measles were also reported from central regions which could have a negative impact on the nutritional status of the children. For children under five, the risk of developing severe or fatal measles is increased by overcrowded living situations (mostly among IDPs) and malnourishment. The cholera transmission season will begin with the onset of the *Gu* rains at the end of March and this will lead to increase in prevalence of severe acute malnutrition during the post *Gu* period.

Post-*Gu* Nutrition Assessment schedule (April – July 2014)

FSNAU and partners are scheduled to conduct nutrition surveys among the displaced populations in Northwest, Northeast and Central regions from 12th May 2014, while the countrywide nutrition surveys in the urban and rural livelihoods will be undertaken in June-July 2014.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The urban food security improved in most parts of the country in the post *Deyr* 2013/14 (February-June 2014) but deteriorated slightly in Middle Shabelle, Bari and Hiran regions. All urban areas are classified as **Stressed** (IPC Phase 2) in February-June 2014 period. Factors that contributed to the urban food security situation included trends in the general cost of living and purchasing power of market-dependent urban households; food security situation in surrounding rural areas; and impact of insecurity on economic/ trade activities, humanitarian access and population displacement.

In the first quarter of the year, the cost of the minimum food expenditure basket showed mild changes in most urban markets, except increasing moderately in the region of Bakool (by 11%). The increased cost of food basket in Bakool is attributed to trade embargo imposed by militant groups as from March 2014 (see Civil Security sector). Compared to a year ago (March 2013), significant increases in the cost of food basket in local currency terms are noted in Lower Shabelle (by 39%), Bay (by 23%), Galagudud (by 19%), Middle Shabelle (by 18%), Wooqoi Galbeed (by 17%) and Lower Juba (by 10%) regions. This trend is mostly driven by cereal price increases attributable to reduced supplies through humanitarian interventions and below normal *Deyr* 2013 and *Gu-Karan* 2013 harvests in Shabelle/ Juba and Wooqoi Galbeed regions respectively (see *Agriculture sector*). In the rest of the country, the trends were mixed - exhibiting declines in some markets and mild increases in others.

According to the FSNAU recent urban surveys and assessments, poor urban households engage in casual labour, on average, for 16-23 days per month in the South-Central and for 22-25 days per month in the North. The FSNAU main market monitoring data indicates stable labour wages in the Northern regions and mild changes in most other regions of the country in the first quarter of the year. The exceptions are Juba regions where the labour wage rates increased moderately (15-19%) due to off-season farming activities in the riverine areas as well as accelerated trade activities for food commodity restocking in anticipation of *Gu* rainy season. In SoSh areas, the lowest wage rates in March 2014 were recorded in Adan Yabal town of Middle Shabelle region (30 000 SoSh or ~USD2) and Hudur town of Bakool region (36 250 SoSh or ~USD2) due to prevailing insecurity that affects economic activities. The highest labour wage rates were in a Kenya-bordering town of Belethawa in Gedo region (221 800 SoSh or ~USD12) due to on-going intense trade and construction activities. In the North SiSh areas, the wage rates ranged from SiSh 36 000 to 55 000 (or ~USD5-8). On average, casual labour wage rates in USD terms are higher in the North (USD6) but are lowest in the Central zone (USD4). Compared to the five-year average levels, labour wage rates in March 2014 show increase in all regions.

In January-March 2014, the Terms of Trade (ToT) between daily labour wage and local cereals remained generally stable in most urban markets (Figures 6 and 7). However, the decline in ToT (by 4-8 kg/ daily labour) was recorded in Lower Juba (Afmadow and Jamame), Lower Shabelle (Wanlaweyne and Qoryole) and Middle Shabelle (Jowhar) regions. The ToT decline in the mentioned markets is mostly attributable to cereal price increases as well as labour wage decline in some cases. In March 2014, the highest ToT between casual labour wage and cereals (30kg/daily labour wage) was recorded in Bakkara market in Mogadishu-city, while the lowest was in Adan Yabal of Middle Shabelle (1kg/daily labour wage); the latter is mainly due to remoteness of this insurgent-controlled town from the main trading routes. The annual comparison (March 2013) shows declines in ToT in many regions, reflecting cereal price and labour wage rate trends. However, the ToTs are higher than their five-year average levels in most regions.

Figure 6: Regional Trend in Terms of Trade Cereal to Labour (Central and North)

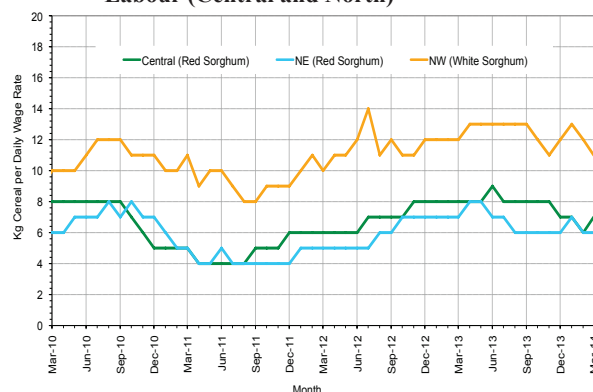
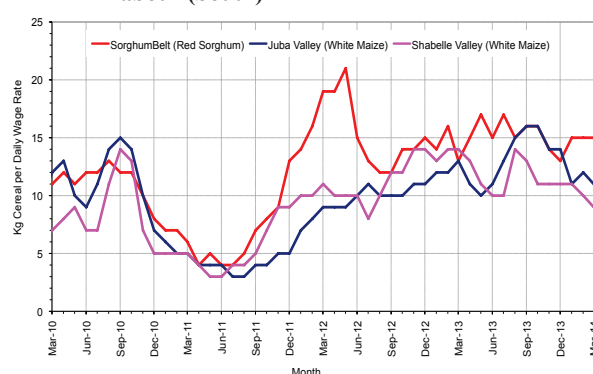


Figure 7: Regional Trend in Terms of Trade Cereal to Labour (South)



RURAL

Northern Regions

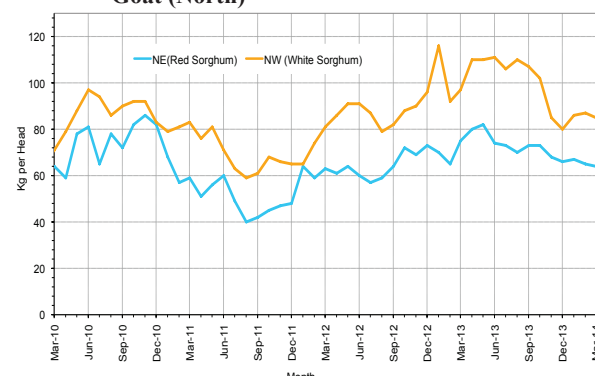
In the post-*Deyr* 2013 season (February-June 2014), most pastoral livelihoods of the Northern regions are classified as **Stressed** (IPC Phase 2) with the exception of cyclone-affected parts of Coastal *Deeh* and Sool Plateau (Dangoroyo, Eyl and Bandar-Beyla districts) which are categorised in **Crisis** (IPC Phase 3).

During the *Jilaal* dry season, pasture/browse have not deteriorated significantly in most parts of the Northern regions. However, the lack of *Gu* rains in the Northeast may lead to a quick deterioration of rangeland conditions. Seasonal water shortages have been experienced in berkad-dependent areas in Gebi/ Sool livelihoods of Sanaag, Sool and Bari regions since March 2014. This resulted in water trucking and water price increases in January-March 2014 in the rural markets of Sanaag (by 10%), Bari (by 25%) and Sool (by 48%) regions. The desert locust (*Schistocerca gregaria*) that was first spotted along the coast of the Northwest (Guban livelihoods) in November 2013, has not brought significant damages to vegetation. In late March to early April 2014, locust swarms slightly damaged the browse (*Acacia* tree leaves) and the limited vegetable farms along the streams of the Golis Mountains (irrigated agropastoral). The locust is likely heading towards Ethiopia, where pasture and browse are greener than in Golis due to an early start of Belg rains.

During *Jilaal*, livestock migration was largely normal, confined to dry season grazing areas. Livestock body conditions remained average to above average (PET score 3-4) across the northern regions. Medium rate of lambing/ kidding of sheep/goat started in March 2014 following conception in *Deyr* 2013. Likewise, medium calving rate of cattle in agropastoral areas of Northwest and low to medium calving rate of camel that started in March 2014 is expected to continue up to June this year. Milk production was near average to average during the *Jilaal* period and is expected to improve in the course of *Gu* 2014 season, subject to normal rainfall performance. Households in the cyclone-affected areas, who received substantial humanitarian support (livestock, food, water, utensils, vaccination/ other medical and limited cash) in 2013, currently (as from March 2014) are mostly reliant on social support from friends and relatives. According to the FSNAU field reports, poor households in agropastoral areas of Northwest (Wooqoi Galbeed, Awdal and Togdheer regions) have already exhausted their cereal stocks due to below average *Gu/Karan* 2013 cereal production and currently rely on market purchases of cereals. Land tillage and *Gu* cereal (maize and sorghum) planting started in agropastoral livelihood zone following the onset of the *Gu* 2014 rainy season.

In January-March 2014, the local quality goat prices increased slightly in most markets of the North. The highest price increase of 34 percent was recorded in Awdal region, which is attributable to improved body condition of goats and less supply on the markets from Golis/Guban pastoral areas where pastoralists are benefitting from milk sales. At the same time, rice prices remained stable or declined marginally across the northern regions. Reflecting the trends in goat and rice prices in the Northwest, the ToT between local quality goat and imported rice increased by 5kg/ head from the beginning of the year to reach 64kg/head in March 2014. On the other hand, the ToT local quality goat/ white sorghum have been stable at 85 kg/head in the first quarter of the year. In the Northeast, the ToT between local quality goat and imported rice has also improved (from 81 to 84kg/head) in the same period of comparison. In March 2014, the highest ToT between local quality goat and rice was recorded in Bossaso (121 kg/head) due to lower rice price and higher goat price in the port-town as compared to other inland markets of the region. The ToT between local

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



Average sheep body condition. Bandar-Beyla, Bari Region, FSNAU, March 2014

quality goat and red sorghum in Bossaso market was equivalent to 85kg/head in March 2014, while the average ToT in Northeast stood at 64kg/head. On a yearly basis, the ToT between local quality goat and rice increased (by 12kg/head) in the Northeast, but declined marginally (by 3 kgs) in the Northwest. However, the ToTs between local quality goat and local cereals (red and white sorghum) exhibited annual declines of 11-12 kg/head due to increase in sorghum price (by 10-16%) and drop in goat price (by 5-8%) [Figure 10].

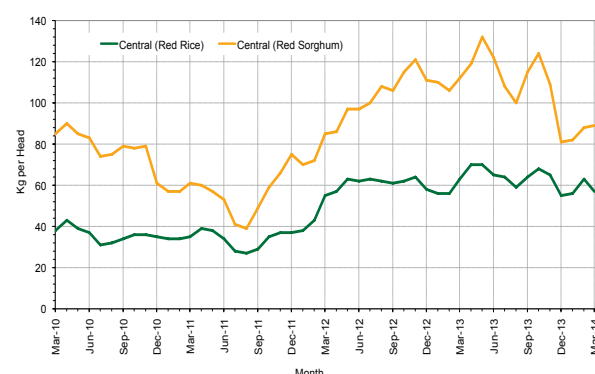
Central Regions

In the post *Deyr* 2013/14, the food security situation improved in all livelihood zones of Central regions primarily due to a positive impact of generally favourable *Deyr* rainy season. In February-June 2014, the Cowpea Belt, Addun and Hawd livelihood zones are classified in **Stressed** (IPC Phase 2), while Coastal *Deeh* is categorised in **Crisis** (IPC Phase 3).

During this *Jilaal* dry season, dry pasture was available in sufficient quantities in large parts of the region. Livestock body conditions are average although milk production has declined seasonally due to reduced quality/quantity of available pasture and browse, as well as low camel calving rates in *Deyr* 2013. As a result, the price of camel milk in rural markets increased by an average of eight percent between January and March 2014. Nevertheless, milk availability is projected to increase during the *Gu* rainy season with some camel calving expected in June 2014. Moreover, kidding/lambing of goat/sheep that commenced at the end of the *Jilaal* (March 2014) season is expected to increase over the course of the *Gu* rainy season. However, there are concerns that delayed *Gu* rains may affect these favourable prospects. In the Cowpea Belt, poor households resorted to cereal purchase as from April this year as their stocks of cowpea crops from *Deyr* 2013 harvest were depleted by the end of March.

In January-March 2014, the local quality goat prices increased seasonally in the Coastal *Deeh*/Cowpea Belt (by 16%), but remained relatively stable in Hawd/Addun livelihoods. Livestock prices are expected to increase over the coming months with the start of live animal stocking by traders for the upcoming Ramadhan period (July). Rice prices increased slightly (by 3%) in the Coastal *Deeh*/Cowpea Belt but remained stable in other livelihood zones. Reflecting the trends in livestock and rice prices, the ToT between local quality goat and rice improved moderately (by 13%) in the Coastal *Deeh*/Cowpea Belt since the beginning of the year, reaching 54 kg/ head in March 2014. However, in Hawd and Addun livelihoods (Dhusamareb, Galka'ayo and Abudwaaq districts) the ToT shows a marginal decline (by 3%) to 59 kg/head in March 2014. The annual comparison indicates stable ToT in Hawd and Addun but reduced ToT (by 23%) in Coastal *Deeh* and Cowpea Belt, resulting from annual rice price increases and livestock price declines. On the other hand, the ToT between local quality goat and red sorghum changed marginally in all the livelihood zones of Central in the first quarter of the year and were lower compared to the same time last year. In March 2014, the ToT local quality goat to red sorghum was equivalent to 69kg/head in Hawd/Addun and 124kg/head in the Cowpea Belt/Coastal *Deeh* (Figure 9).

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



Near average camel body condition. Galka'ayo, Mudug Region, FSNAU, March 2014

Southern Regions

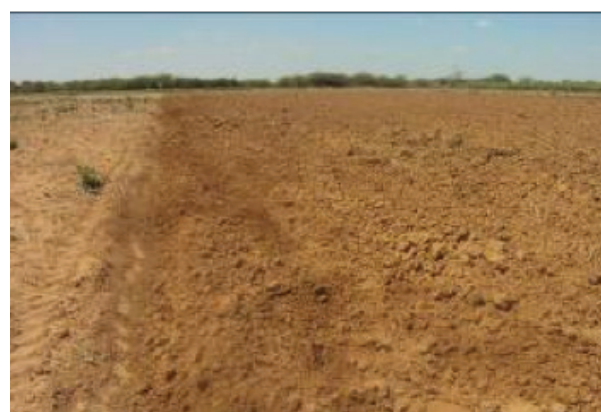
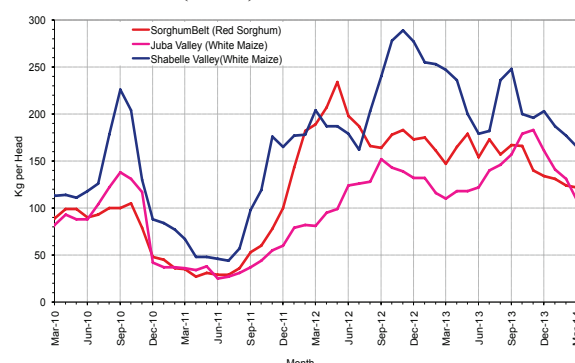
In the post-*Deyr* 2013/14 season most rural livelihoods of southern regions are classified as **Stressed** (IPC Phase 2). However, the food security situation in Riverine and Southern Agropastoral livelihoods of Middle Juba as well as in parts of Riverine of Middle Shabelle (Jowhar district) was categorised as **Crisis** (IPC Phase 3) due to the impact of poor *Deyr* 2013 rains, floods and conflict.

The *Jilaal* dry season was relatively mild as dry pasture and water were available in most livelihoods with the exception of Juba (Southeast Pastoral and SIP livelihoods), southern parts of Gedo (SIP livelihood), pockets of Lower Shabelle (rainfed agropastoral areas) and Hiran (agropastoral livelihood of the Beletweyne district). However, the rangeland conditions improved with the start of *Gu* rains, particularly in Juba and Gedo regions. Livestock migration has been normal in most parts of the southern regions and medium kidding/calving rates are reported.

The *Deyr* cereal stocks for poor household are likely to last until the end of May in Bay and Gedo Agropastoral High Potential as well as in Lower Shabelle Riverine. Cereal stocks from the recent off-season harvest (March 2014) in the riverine areas of Middle and Lower Juba and parts of Jowhar are also likely to exhaust by the end of May 2014. *Gu* 2014 agriculture activities started in March in most southern regions although varied in terms of intensity from area to area, depending on rainfall performance and security conditions (see *Civil Security and Agriculture sections*). Between January and March 2014, labour wages have improved in some rural markets with the start of *Gu* seasonal activity (Juba - by 27%, Bay -by 25 %, Bakool- by 33 % and Middle Shabelle - by 8%) but declined in Gedo (by 12%), Hiran (by 24%) and Lower Shabelle (by 6%) regions due to insecurity and/or delayed *Gu* 2014 rains.

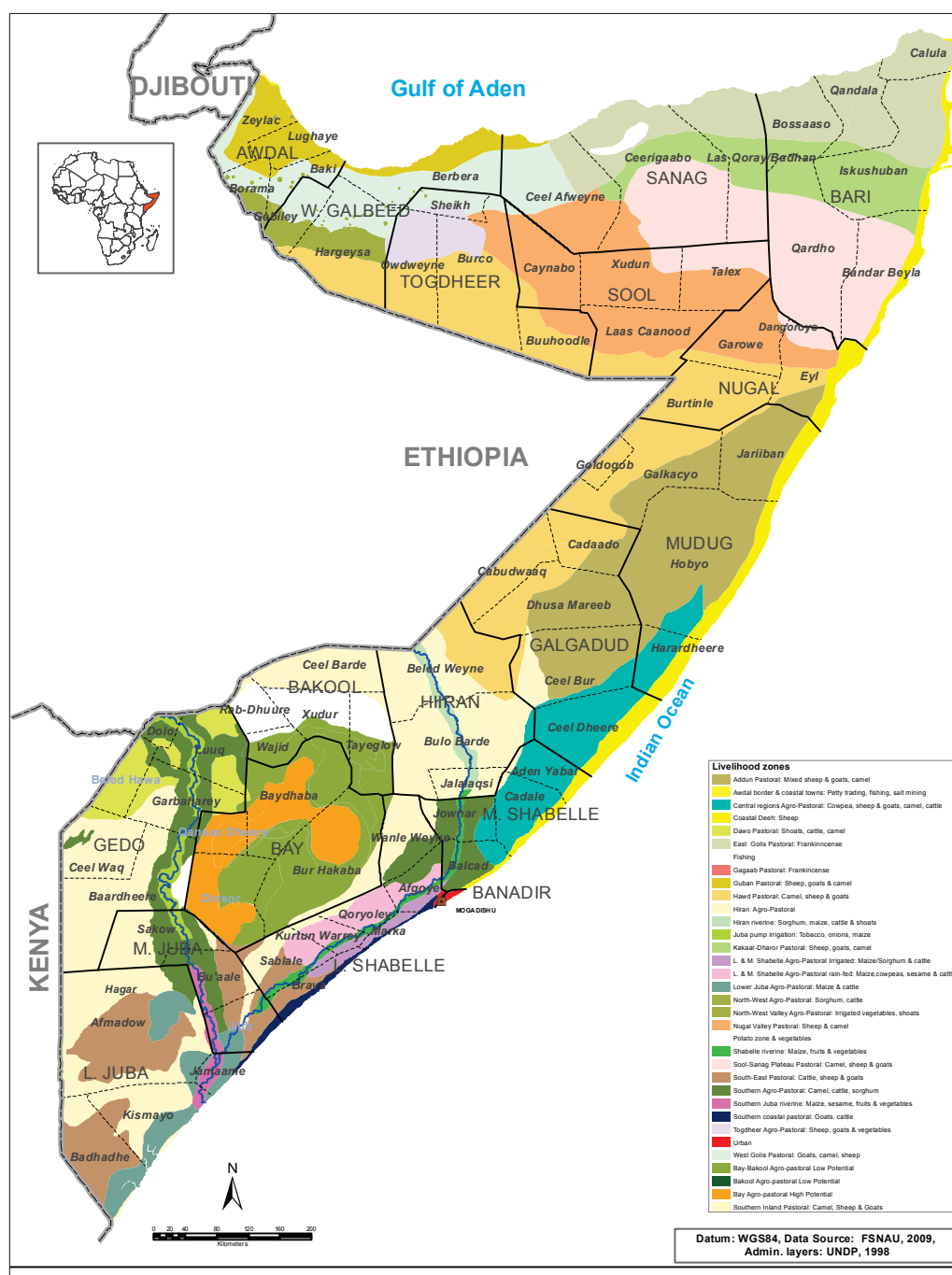
In the first quarter of the year (January-March 2014), the ToT between maize and labour wages showed a moderate increase (by one kg) in rural areas of Juba regions and stable levels (8 kg/labour wage rate) in Middle Shabelle region on the account of increased labour wage rates. In the Sorghum Belt, the ToT between labor wage and red sorghum increased by 3-5 kgs in Bay and Bakool regions, but dropped by 2kgs in Hiran and Gedo due to declines in wage rates. The highest ToT in March 2014 was recorded in Bay (21kg/ daily wage rate), while the lowest was in Hiran (8 kg/ daily wage rate). Compared to a year ago, the ToT declined (by 10-25 %) in most of the southern regions as a result of increased cereal prices. The largest drops were recorded in Lower Shabelle (by 25%) and Hiran (by 50%), mainly resulting from increased cereal prices, reduced humanitarian assistance and reduced labour wages due to slow-down in trade activities because of insecurity. In January-March 2014, the ToT between local quality goat and maize has been stable in Lower Juba but declined by 16kgs (by 11%) in rural areas of Middle Shabelle and marginally (by 2-5kgs/head) in Middle Juba and Lower Shabelle as a result of increased cereal prices and reduced local quality goat prices. In the Sorghum Belt, the ToT between local quality goat and red sorghum exhibited increases in Bay (by 20 kg/head), Bakool (by 5kg/head) and Hiran (by 5kg/head) due to increased goat price, but declined in Gedo (by 6kg/head). In March 2014, the highest ToT local quality goat/ cereals was recorded in Bay (363kg/head), while the lowest was in Lower Juba (by 78kg/head) [Figure 10].

Figure 10: Regional Trend in Terms of Trade Cereal to Goat (South)



Gu 2014 land preparation. Riverine, Beletweyne, FSNAU, March 2014

SOMALIA LIVELIHOODS ZONE MAP



Recent and forthcoming publications and releases

FSNAU Nutrition Update (Forthcoming)
FSNAU/FEWSNET Climate Update, March 2014
FSNAU/FEWSNET Market Data Update, March 2014
FSNAU Post Deyr 2013/14 Nutrition Technical Report
FSNAU Post Deyr 2013/14 Food Security and Nutrition Technical Report

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