

KEY ISSUES

According to the post-*Deyr* 2014/15 seasonal assessment results, based on Integrated Phase Classification (IPC), an estimated 731 000 people are classified in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) acute food insecurity phases from February to June 2015. A total caseload of acutely malnourished children under-five (based on October-December 2014 results) is 202 600 children. The results of recent rapid field assessments (March 2014) and a monthly monitoring of food security indicators by the FSNAU indicated that the estimates of population in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) among internally displaced persons (IDPs) and rural people is likely to remain unchanged through June 2015. However, recent nutrition MUAC assessment results (April 2015) in Bulo Burte (Hiran) revealed very critical level of malnutrition rates (Global Acute Malnutrition [GAM] of 33%), which suggests a worsening of the food security situation in the town which is already **Emergency** (IPC Phase 4). Worsened food security conditions could be attributed to a significant surge in food prices since January this year as a result of scarcity of food on the markets and reduced economic activities in the context of continued siege by insurgents and severely limited access to humanitarian assistance.

- The 2015 *Jilaal* dry season (January – March) was hotter and drier than usual in all pastoral and agropastoral livelihoods of Somalia, which caused a significant deterioration in vegetation conditions in most of the South as well as parts of the North. Water shortages experienced in many parts of the country during February-March resulted in significant increases in water prices. However, the early start of the *Gu* rainy season (from late March) brought some improvement to pasture and water resources in the affected areas. Although milk production declined seasonally during the *Jilaal* period, causing increases in milk prices in most parts of the country, it is likely to improve in the course of *Gu* April-June 2015 rainy season with calving/ kidding of livestock expected in May-June 2015.

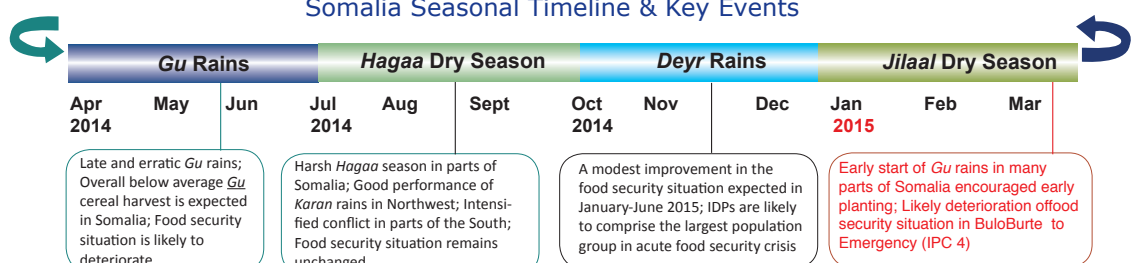
- According to FSNAU rapid assessment results, off-season harvest (maize, sesame and cowpea), with a total estimate of nearly 10 000 tones, was collected in February-March 2015 in three southern regions (Lower Juba, Middle Juba and Gedo). Poor farmers in these areas as well as in parts of Bay and Lower Shabelle currently have cereal stocks. However, in most agricultural livelihood zones of the country poor households 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. Prompted by early start of *Gu* rains, seasonal farming activities (land preparation, planting, etc) commenced in most of the South and in the Northwest, in March 2015. However, prevailing insecurity in parts of Lower Shabelle, Hiran, Bakool and Gedo may affect the intensity of cultivation in these regions. The *Gu* harvest will largely depend on rainfall performance in April through June, which is expected to be near to below normal, based on the early outlook issued in February 2015.

- Cereal prices exhibited mild increases in most markets in the first quarter of the year, but surged significantly in Bulo Burte (27%). The poor segments of Bulo Burte town also have the weakest purchasing power expressed in terms-of-trade (ToT) between daily labour wage and cereals (1.8kg of cereals for one day of casual labour wage). Conversely, cereal prices have come down in another siege-affected town of Hudur (Bakool) due to improved supplies through Elbarde as well as ongoing humanitarian assistance. Compared to a year ago, ToTs dropped in most regions as a result of increased cereal prices and/or decreased labor wages and goat prices. The consumer price index (CPI) shows relatively stable rates of inflation in the first quarter of 2015; it has also remained largely unchanged in most parts of Somali shilling (SoSh) regions, but declined by six percent in Somaliland shilling (SISH)-using regions.

- Acute malnutrition trends based on data from health facilities for January-March 2015 suggest deterioration in nutrition situation in Hiran region (Buloburte, Beletweyne districts), Banadir region and in riverine livelihoods of Gedo region and Shabelle regions, parts of Northeast (Sool and East Golis/Karkar) and Burao-town in Northwest. Apart from deteriorated food security conditions in Buloburte, the worsening nutrition situation in other regions in the South could be ascribed to various diseases reported by MCH clinics as well as lack of nutrition supplies to treat malnourished children in the largest referral hospital in South-Central Zone in Banadir.

- Humanitarian assistance, geared towards treatment of malnourished children, improved access to food, social safety nets and livelihood support are needed, at least, until the next *Gu* harvest in July-August 2015.

Somalia Seasonal Timeline & Key Events



Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

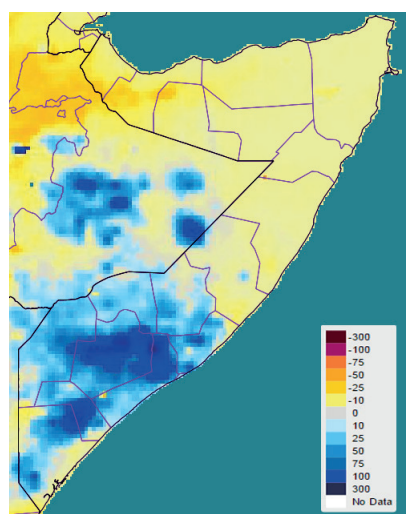
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SECTOR HIGHLIGHTS

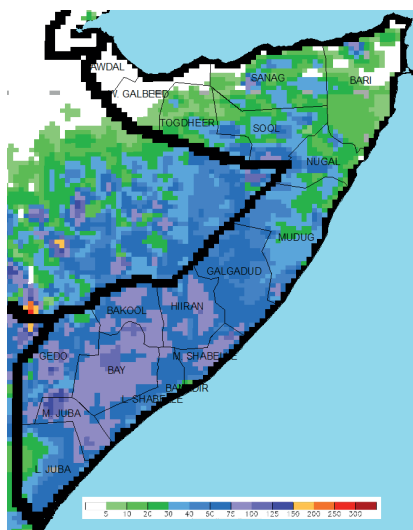
CLIMATE

Map 1: RFE Anomaly April Dekad 1 2015



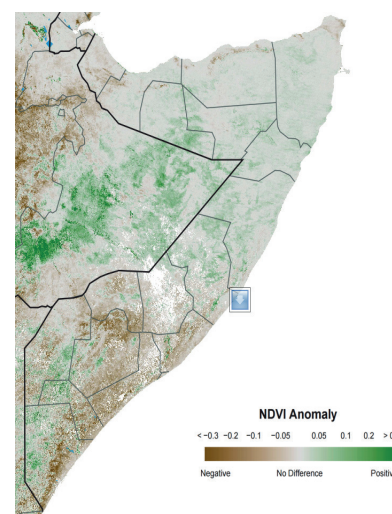
Source: NOAA-CPC

Map 2: Cumulative RFE Forecast in Week ending 24th April 2015



Source : NOAA

Map 3: E-MODIS Anomaly April 1st Dekad 2015



Source: NOAA

Rainfall Performance

The 2015 *Jilaal* dry season (January – March) was relatively hotter and drier than normal in all pastoral and agropastoral livelihoods of the country. No rainfall was reported during this period in most parts of the country, as expected. Both the satellite derived rainfall estimates (RFE) and field reports confirmed the dry weather throughout the country with the exceptions of Guban pastoral of Northwest regions and East Golis pastoral of Bari region (Bossaso, Qandala, Calula and Iskushuban districts) where light to moderate *Hays* rains precipitated between January and February 2015.

In late March, early *Gu* rains fell in many areas of the country with light to moderate intensity but of poor frequency and distribution. In the South, most parts of Lower and Middle Juba, Lower and Middle Shabelle, Bay, Bakool, Hiraan and Gedo regions received light to moderate rains during the last dekad of March, but agropastoral and riverine livelihoods of Juba and Hiran remained dry. In Central, localized light to moderate rains were reported in parts of Cowpea Belt, Hawd and Addun pastoral livelihood zones of Galgadud region. In the North, moderate rains were received in most parts of pastoral and Northwest agropastoral livelihoods, while light rains fell in northern part of Wooqoyi Galbeed and Sanaag regions as well as in parts of Coastal *Deeh* and Nugal Valley of Northeast regions.

In the first dekad of April, field reports were in agreement with the satellite imagery, indicating light to moderate rainfall of 10 to 50 millimetres (mm) in most of the southern regions. However, the rainfall was poor in most parts of Central, while dry conditions prevailed in the northern regions of the country during this period. The rainfall estimate for April 1 to 10, 2015 compared to the 1920 to 1980 long term mean (LTM) shows poor rains for most parts of the northern and central regions of the country during this period. However, most areas of the Bay, Bakool, Lower Shabelle and some parts of Juba, Gedo, Middle Shabelle and Hiran regions received above normal rains (Map 1).

Based on the forecasts issued in February 28, 2015 (Greater Horn of Africa Climate Outlook Forum) the March-May rains are projected as near normal to below normal with delayed onset and erratic temporal distribution in most parts of country. However, near normal to above normal *Gu* rains were projected in parts of Northwest and Northeast and south of Juba regions.

According to the United States National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Centre (CPC) one week forecast ending 24th April, 2015) for Africa, a heavy amount (50-125mm) of rains is expected in most of South-Central and some pockets in the North. The rest of the country is likely to receive between 10-30mm of rains (Map 2).

Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) for the first dekad of April illustrates poor vegetation in most of the South, West Golis and Guban pastoral areas of Northwest and East Golis of Bari and Sanaag regions (Map 3). This is a result of average to below average *Deyr* 2014 rains and hotter than normal *Jilaal* dry season followed by light to no rains in late March and the first 10-days of April 2015. Conversely, foliage improved in most livelihood zones of central and northern regions, as well as in the Southern Inland Pastoral (SIP) areas of southern Somalia.

CIVIL INSECURITY

In the first quarter (January-March) of the year 2015 incidences of violence purported by the insurgents in Somalia such as suicide bomb explosions, land mines, targeted killings and armed confrontations, have continued in the southern regions, particularly in Mogadishu, Hiran, Gedo, Bay, Bakool and Lower Juba. Most of the incidences were directed at the Somali Federal Government officials and partners, while scores of civilians were injured or killed. On its part, the Government of Somalia together with its allied African Union Mission to Somalia (AMISOM) forces remained in control of the major commercial and administrative towns in the South apart from Middle Juba region, which is fully controlled by the insurgents. According to the United Nations High Commissioner for Refugees (UNHCR) for Somalia, violence erupted on 10 February 2015 in the Galgadud region (Guricel district) between insurgents and pro-Federal Government Somalia (FGS) forces, causing human death and displacements. However, a temporary cease fire has been reached and warring militias have withdrawn from the battle field. Armed fighting between Puntland government forces and insurgents occurred in the sparsely populated Galgala village near Bossaso in Bari region (source: *United Nations Office for the Coordination of Humanitarian Affairs (OCHA) February 2015 update*).

Resource-based clan conflicts that prevailed in Shabelle regions since late 2013 have defused due to the effective mediations by elders and government departments. However, despite reconciliation effort clan-based conflicts in Hiran (Defow village near Beletweyne) continue to gather momentum with parties involved reportedly amassing militias in preparations for new attacks.

The insurgents' siege of the major supply roads to Bakool (Hudur and Wajid), Bay (Qansahdere), parts of Gedo (Burdhubo) and Hiran (Bulo Burte), have continued. As a result, trade flows and market activities have particularly been affected in Bulo Burte as reflected in significant surge in essential commodity prices. Other implications of the siege include continued and unaccounted displacements of the local population to relatively stable locations within the same region or even beyond (e.g. Mogadishu). This might affect intensity of *Gu* 2015 seasonal agricultural activities (planting) in the above-mentioned areas. On the other hand, a trade embargo in Lower Shabelle (Qoryoley and Kurtunwarey), which prevailed in 2014 has eased up due to advances made by the Federal Government of Somalia and its allied forces (AMISOM).

Based on the UN OCHA February 2015 update, humanitarian access remains constrained in southern and central regions of Somalia. The access is particularly difficult along the road from Mogadishu via Baidoa in Bay region to Dolow in Gedo region as well as on the roads between Beletweyne, Jalalaqsi and Bulo-Burte of Hiran region, due to multiple unauthorized check-points and extortions along the route (source: *UNOCHA Humanitarian Bulletin February 2015*).

According to UNHCR, as at February 2015 there were 1 106 000 internally displaced persons (IDPs), 9 495 non-Somali asylum-seekers and 2 744 non-Somali refugees within Somalia. Additionally, with support from various humanitarian organisations, 1 772 Somali refugees from Kenya have returned to Somalia (Luuq, Baidoa and Kismayo districts) in the period between 8 December 2014 to 1 March 2015 (source: *UNHCR Somalia, February 2015 Update*).

AGRICULTURE

In late March 2015, FSNAU undertook a rapid assessment to evaluate the *Jilaal* dry season impact on livelihoods in Somalia, off-season crop harvest (Gedo, Lower and Middle Juba regions) and *Gu* planting activities (land tillage, sowing, irrigation, etc.). According to the assessment results, a total of 9 740 tonnes of off-season crops, including maize (3 215 tonnes), sesame (5 610 tonnes) and cowpea (915 tonnes) were harvested in the above-mentioned three regions from late February to early March 2015. The actual off-season maize production is somewhat lower compared to the projections (3 800 tonnes) made during the *Deyr* 2014/15 assessment. This is attributable to lower harvests in the Middle Juba (by 20%) and Gedo (by 14%) regions due to dry winds and elevated temperatures as well as the effects of insect and wild animal damages, which reduced yield per hectare area, particularly in Middle Juba. Additionally, about half of the off-season maize in Luuq district (Gedo region) was 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. Estimates of the *Deyr* 2014/15 off-season harvest in the above-mentioned regions are summarized in Table 1.

The seasonal *Gu* 2015 agricultural activities began in late March in most of the South. The main activities included land preparation, seed planting, ridging for

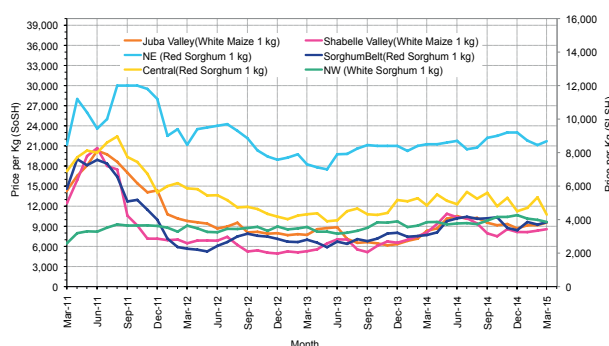
Table 1: *Deyr* 2014/2015 Maize Off-season Harvest

Region	Planted Areas (ha)	Harvested Areas (ha)	Production (MT)
Lower Juba	1 550	1 450	815
Middle Juba	2 800	2 800	1 400
Gedo	2 090	1 700	1 000
Total	6 440	5 950	3 215

rainwater harvest and early irrigations in riverine areas. The early planting of crops were prompted by early *Gu* rains that fell in most regions. However, farming activities are likely to be constrained in areas affected by conflicts such as Lower Shabelle (Marka and Barawe), Hiran, Gedo (Garbaharey/Burdhubo) and Bakool (Hudur and Elbarde) regions. Soaring costs of agricultural inputs (Hiran) may also affect cultivation rate in this *Gu* season. In agropastoral areas of Northwest (Awdal and W. Galbeed), land preparations activities have also begun at a normal pace. The increased farming activities have created job opportunities for poor households in southern regions.

The cereal availability has improved on the markets in most regions due to increased supplies from *Deyr* 2014/15 and off-season harvests. Nevertheless, the cereal prices have shown mixed trends in crop-producing regions of southern Somalia. Between January and March 2015 maize prices have increased in the riverine markets of Shabelle (by 7%) and Juba (by 4%), following seasonal patterns. In March 2015, the lowest maize prices (6 200-7 400 SoSh/kg) were recorded in Dinsor (Bay), Jamame (Lower Juba) and Qoryoley (Lower Shabelle), while the highest price (13 875 SoSh/kg) was reported in Elwak (Gedo). The sorghum prices have increased in Bay (5%), Gedo (11%), Bakool (14%) and most significantly in Bulo-Burte (27%) of Hiran region, but they have reduced mildly in Northwest and were stable in Northeast in the first quarter of the year (January-March 2015). In March 2015, the lowest retail price of sorghum was reported in Dinsor (3 920 SoSh/kg) and Qanshadere districts (4 900 SoSh/kg) of Bay region, while the highest prices were recorded in Elbarde district of Bakool region (15 000 SoSh/kg) [Figure 1].

Figure 1: Monthly Trends in Local Cereal Prices

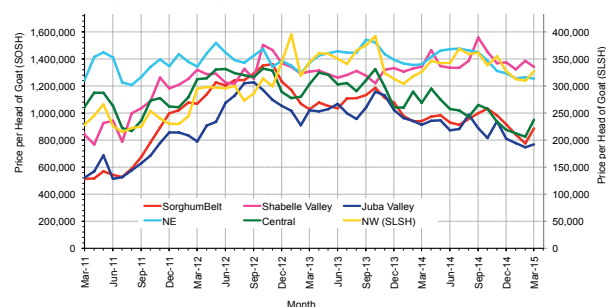


Year-on-year comparisons indicate increase in maize prices in Shabelle (8%) and Juba (34%) regions due to below average to poor *Deyr* 2014/15 harvests respectively, and reduced humanitarian interventions. Significant flows of imported maize from neighboring regions and off-season harvests have most likely prevented further increase in maize prices. Similarly, the price of sorghum has shown an increasing trend over the past 12 months in the Sorghum Belt regions (Bay, Bakool, Gedo, and Hiran). In Bay and Hiran regions, the sorghum price were 36 and 10 percent higher compared to the previous year (March 2014) as a result of increased transport costs (taxation and road blocks) and amplified demand in crop-deficit regions where supplies from previous harvests began to draw down. Similarly, the sorghum prices have also increased by 24 percent in Bakool due to prevailing insecurity and continued siege by insurgents.

LIVESTOCK

The impact of the *Jilaal* dry season (January-March) in most pastoral livelihoods of the country was mild due to near average to above average *Deyr* 2014 seasonal performance and early onset of *Gu* 2015 rains. The pasture conditions in most key pastoral and agropastoral areas have deteriorated seasonally over the *Jilaal* period. However, harsh *Jilaal* with significant deterioration of pasture/ browse and water was reported in parts of northern, central and southern regions, where *Deyr* rains (October-December 2014) were below average to poor such as parts of Hawd of Togdheer, East Golis/Gebi of Sanag, upper part of Nugal Valley of Sool, Dharor/East Golis of Bari, Hawd/Addun of Central, Agropastoral of Hiran, coastal areas of Shabelle and Juba, Southern Inland Pastoral (SIP) of Juba and Gedo, Dawa Pastoral and Southern Agropastoral of Gedo (Garbaharey district). In parts of the rain-deficit regions, berkads and the natural water ponds have dried up by early February, causing increase in water prices. Between January-March 2015, the highest price increases were recorded in Bay/Habibayal rural market (220%) due to below average to poor *Deyr* 2014/15 rains and overuse of water by in-migrated livestock (from Gedo to Bay) as well as in north Mudug of Jariban district (96%). The price of water has also increased significantly in rural markets of Sool (80%), Gedo and Lower Juba (67% each), Lower Shabelle (36%), Central (31%), Nugal (24%) and Sanag (15%). Early *Gu* 2015 rains brought only mild alleviation to the severity of the *Jilaal* in the rain-deficit areas as the rains discontinued from 25th March. Thus, further improvements will very much depend on the performance of *Gu* rains in April/May 2015.

Figure 2: Regional Trends in Local Quality Goat Prices (SoSh/SLSh)



During *Jilaal*, livestock migration was normal in most parts of the country, within the seasonal dry grazing areas and close to the water points. However, early onset of the *Gu* 2015 rains from the third dekad of March prompted hasty livestock movements/migration from rain-deficit areas to early rained areas. Livestock body conditions remained average (PET score 3) in most livelihoods of the country; exceptions are rain-deficit areas where body condition deteriorated to below average/ poor (PET 2-1). Medium rate of lambing/ kidding of sheep/goat started in March 2015 in most livelihoods of the country following conception during *Deyr* 2014. Similarly, low to medium calving rate of cattle in South and Agropastoral of Northwest as well as of camel is expected to start in May and continue up to June 2015. Milk production seasonally declined to below/ near average levels during the *Jilaal* period but is expected to improve in the course of *Gu* 2015 rainy season, subject to normal rainfall performance.

From January to March 2015, livestock prices (for local quality goat/cattle), either remained stable or showed mild to moderate increases in most markets. On average, local quality goat prices increased by twelve percent in Central and by five percent in Northwest, while they remained stable in Northeast in the same comparison period. However, a yearly price comparison indicates declines in the Northeast (8%), Central (12%) and a relative stability in Northwest. In southern Somalia, local quality goat price mostly remained unchanged in the first quarter of the year, with the exception of mild (5%) increase recorded in the Sorghum Belt. Annual comparison of the local quality goat price indicates declines in the Sorghum Belt (6%) and Juba (16%), and levels in Shabelle valley markets (Figure: 2). January-March 2015, local quality cattle prices exhibited declines (9-10%) in Juba and the Sorghum Belt, mainly due to tension on the border between Kenya and Somalia and prevailing security problems respectively, which impeded traders' access to markets. The cattle prices remained relatively stable in Shabelle valley. Annual comparison indicates decline in cattle prices (18-22%) in most southern regions. In contrast, local quality cattle prices increased in the Northwest (11-15%) in both comparison periods.



Average body condition, Agropastoral, Afgoe, Lower Shabelle region, FSNAU, March 2015

MARKETS AND TRADE

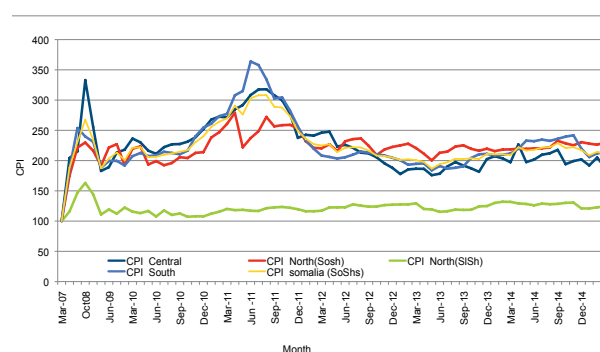
Exchange Rate Trends

From January to March, the SoSh held steady against the U.S. dollar (USD) in most SoSh using markets but the rates varied slightly between the markets in the South and Northeast. By March, the retail exchange markets in Banadir Region (Mogadishu), for example, quoted the SoSh at a monthly average rate of SoSh 22 033 per USD, while Northeast markets (Bossaso and Garowe) recorded an average of SoSh 20 678 per USD. However, the shilling has significantly depreciated (11-16%) over the past year but remained strong when compared to March five-year average period (particularly in Mogadishu). The rates have been driven primarily by increasing economic activity in Mogadishu and buoyed by the limited supply of paper shillings. Over the last three months as well as the past one year, the SSh to USD exchange rate was relatively stable across most markets of the SSh-using area. However, the SSh depreciated by nearly 10 percent against the USD compared to March five-year average. The depreciation has been attributed to increased gradual injection of new notes by the Somaliland authority.

Cereal Imports and Commodity Price Trends

The prices of imported commodities (rice, sugar, wheat flour and vegetable oil) were seasonably stable across most reference markets. This was attributed to stable and/or declining world prices and a typical increase in trade supply from ports for pre-stocking before the April-to-mid September closure of sea routes when the monsoon tides curtail sea transport. The average annual price changes from March 2014 indicate that the prices of the imported food items in Somali shilling terms are generally stable or declined moderately in the central, northern and southern markets. However, compared to the five-year average, imported commodity prices are significantly lower in the Somali shilling areas, but are nearly the same as the average in the northern Somaliland shilling-using areas.

Figure 3: Monthly Trends in CPI



Cumulative January to March 2015 imports (1 488 tonnes) of sorghum and maize from Ethiopia to central and northern Somalia increased by 25 percent when compared to January–March 2014 cumulative. The increased flow was attributed to conflict related trade constraints that restricted movement of these commodities from southern Somalia where January to February 2015 *Deyr* cereal production was average. Thus, Ethiopia was a preferred source market. Some (27 524 tonnes) of the food items, mainly sugar, wheat flour and rice, imported through the ports of Somalia were re-exported to Ethiopia and Kenya. The re-exports are nearly 30 percent higher when compared to the same period last year, which can be ascribed to increased demand from neighboring regions in view of lower international prices of these commodities.

Consumer Price Index (CPI)

The CPI for urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), shows stable inflation rates over the first three months of 2015. This reflects the overall stability of the local currency prices of the major commodities (cereals and sugar) that make up the bulk of the consumer basket. Over the past one year, the index remained largely unchanged in most parts of SoSh regions, while it declined by six percent in SiSh-using regions (Figure 3).

NUTRITION SITUATION

Deyr 2014/15 assessment had identified Bay Agropastoral, all livelihoods of Gedo region (pastoral, agropastoral and riverine), Beletweyne district in Hiran region as well as livelihoods of Hawd Central and Coastal *Deeh* Central as hot spots for acute malnutrition in South-Central regions. The nutrition situation observed during *Deyr* 2014/15 was also projected to be sustained during February – April 2015.

Current HIS data (January-March 2015) show deterioration in nutrition situation among Riverine livelihoods of Gedo and Shabelle region and in urban districts of Beletweyne and Buloburte in Hiran region, besides Banadir region (Table 1). There were cases of measles, malaria and Acute Watery Diarrhoea (AWD) reported among Shabelle Riverine. Fluctuating trends of malnutrition were noted in Banadir region. MCH centres in Zam Zam and Hamar Weyne reported increasing trends in acute malnutrition, which could be due to measles, Acute respiratory infections (ARI) and AWD reported in these MCH as well as lack of nutrition supplies to treat malnourished children reported by Banadir Hospital, which is the largest referral hospital in South-Central Zone. Due to volatile security situation in and around Shabelle valley and increased displacement and population movement because of the newly liberated towns, deterioration in nutrition situation is expected among urban poor and IDPs in Banadir region. Moreover, even though the coming *Gu* rains might improve pasture and milk availability in the area, it is vital to keep a watch over the riverine areas in Gedo region and Shabelle, which are vulnerable to flooding. Health facilities among Hawd Central, Addun Central, Cowpea and Coastal *Deeh* also show sustained prevalence of critical levels of acute malnutrition.

In North East, Health facilities in livelihoods of Sool and East Golis/Karkar show deterioration in nutrition situation while others report sustained nutrition situation.

Deterioration in nutrition situation among NW Agro pastoral from acceptable (<5%) to Alert (5- <10%) and among IDPs was projected for the period Feb-Apr 2015. However increasing malnutrition trends (>15%) seen in health facilities among urban areas (Central Burao) in NW is unexpected.

Table 2: Trends in Acute Malnutrition among children in Somalia based on data from health facilities

Livelihood / HIS TRENDS- Preceding 3 months relative to ≥ 2 yr seasonal trend	ACCEPTABLE Very low (<5%) proportion in the preceding 3mths relative to >2yr seasonal trends	ALERT Low proportion (5 to <10%) and stable trend in the preceding 3mths relative to >2yr seasonal trends	SERIOUS Moderate (10 to <15%) and stable or low (5 to <10%) but increasing proportion in the preceding 3mths relative to >2yr seasonal trends	CRITICAL High (> 15%) and stable proportion in the preceding 3mths relative to >2yr seasonal trends	VERY CRITICAL High (> 15%) and increasing proportion in the preceding 3mths relative to >2yr seasonal trends
SOUTH CENTRAL REGION					
CENTRAL			Cowpea , Coastal Deeh	Addun, Hawd	
GEDO				Pastoral, Agro pastoral	Riverine
JUBA			Juba Riverine	Pastoral, Agro pastoral	
SHABELLE				Shabelle Agropastoral	Shabelle Riverine
HIRAN					Beletweyne, Buloburte
BANADIR				Mogadishu Urban	
BAY /BAKOOL				Bay Agro pastoral Bakool Pastoral Bakool Agropastoral	
NORTH WEST					
Northwest Livelihoods	W Golis/Guban Hawd	Agro pastoral Hargeisa urban Berbera Urban Borama urban	E Golis	IDPs	Burao Urban
NORTH EAST					
Northeast Livelihoods			Hawd Addun Nugal Valley Sool Plateau E Golis and Karkar Coastal Deeh Bosaso Town		

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The urban food security situation indicated considerable improvement in most parts of the country in the post Deyr 2014. Number of urban people classified in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) reduced considerably (41-60%) from the post-*Gu* 2014 down to 72 000 and 12 000 respectively in the post-*Deyr* 2014/15. Accordingly, estimates of urban people classified as **Stressed** (IPC Phase 2) increased in the same period, reaching almost one million, with the majority concentrated in the southern regions. Additionally, significant numbers from Northern regions were downgraded to Minimal (IPC Phase 4). Factors that contributed to the urban food security situation included stable or improved purchasing power of urban people, declined cost of the Minimum Expenditure Basket (CMB), limited humanitarian assistance, and impact of insecurity on economic/ trade activities and population displacement.

During the *Jilaal* season (January – March), the CMB has shown mixed trends (stable, decrease of 4-9%, increase of 4-13%). The highest increases in the CMB (10-13%) were recorded in the markets of Gedo (El-wak, Luuq and Bardera), Lower Juba (Hagar), Middle Juba (Jilib) regions. The increased cost of food basket is attributed to trade restrictions introduced by militant groups in March 2015 (Gedo), chronic high taxation as well as remoteness and double taxation from both Government and insurgents (Juba regions). Compared to a year ago (March 2014), the CMB increased by 10-14 percent in local currency terms in Bari, Bakool, Banadir and Bay regions, while the highest increase of 19 percent was recorded in Middle Shabelle region. In the remaining regions the CMB indicated relatively mild changes (decline/ increase of 3-9%).

According to FSNAU reference market, daily labour wages were stable since January 2015 in the southern regions, and, increased by 11 per cent in the Northwest region. Conversely, labour wages have increased in Bakool due to resumed on-farm activities and in Lower Juba due to off-season maize and cash crop harvests, as well as increase of trade exchanges of imported commodities. In March 2015 the highest labour wage rates were found in Belet Hawa of Gedo region (220 250 SoSh/day) and Caluula town of Bari region (200 000 SoSh/day) where cross-border trades (Kenya and Gulf states respectively) and urban activities (e.g. portering, construction, etc.) are more intense. On the other hand, the lowest daily labour wages in March 2015 were noted in Buloburte (25 000 SoSh/day) in Hiran due to continued siege that disrupted economic activities in the town as well as in Aden Yabal (30 000 SoSh/day) of the Middle Shabelle region, which is attributable to trade isolation due to poor roads (widespread sand dunes).

Both local and imported cereals are available in the most urban markets; hence, cereal prices in most regions remained stable from January 2015 apart from Northwest and Central where local cereal (white and red sorghum) prices declined by 5-9 percent. The stability is attributed to average *Deyr* 2014/15 cereal harvest, cross-border trade with Ethiopia and normal supply of imported commodities from Mogadishu, Kismayo, Bossaso and Berbera ports.

In the first quarter of 2015, the purchasing power (measured through the ToT between daily labour wages and cereals) of the most market-dependent households remained stable in most regions as per projected trend. Thus, daily labour wage against local and imported cereals (ToT) remain relatively stable in most urban areas across the country (North, Central and South). The highest ToT between labour to cereal (22kg/daily labour wage) was reported in Dolo district of Gedo region, while the lowest was in Elbarde town of Bakool (3kg/daily labour wage). The latter is mainly due to remoteness from the main trading routes. Prevailing insecurity and insurgents' siege for the past one year in Hiran (Bulo Burte) continued affecting trade flow, leading to food price increases. Between January and March 2015, prices have increased both for the imported commodities such as wheat, flour, rice, sugar, vegetable oil (36-56%) as well as

Figure 4: Regional Trend in Terms of Trade Cereal to Labour (Central and North)

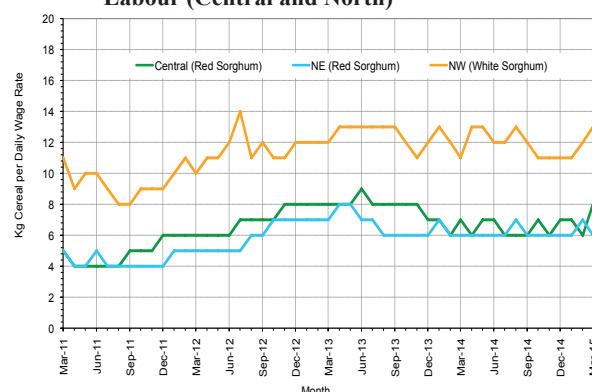
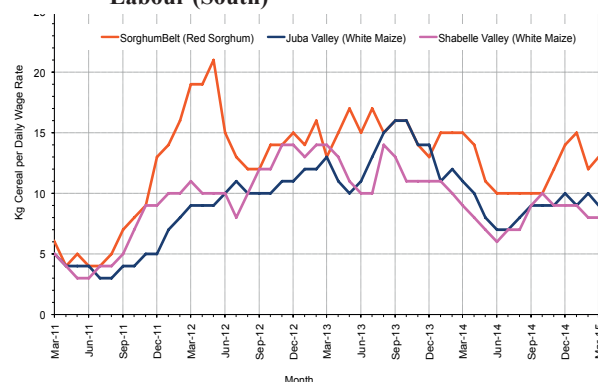


Figure 5: Regional Trend in Terms of Trade Cereal to Labour (South)



local cereals such as red sorghum and maize (27%). However, food prices have come down in Huduur (Bakool) since January and compared to last year due to humanitarian assistance and improved food supply through Elbarde district.

The ToT (daily labour rate /cereals) has remained unchanged in the North and Central regions compared to a year ago (March 2014 – March 2015). The ToT showed minor declines in cereal producing regions of Shabelle, Jubas and the Sorghum Belt, reflecting the local cereal price and labour wage rate trends. The lowest ToT in March 2015 was recorded in Bulo Burte town. However, the ToTs are higher than their five-year average levels in most regions (Figures 4 and 5).

RURAL

Northern Regions

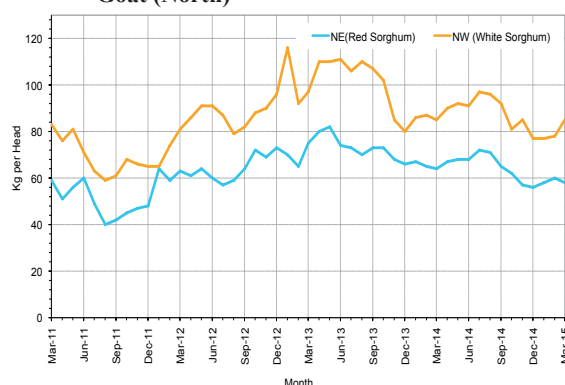
The food security situation has improved in the *post-Deyr* 2014/15 from the *post-Gu* 2014 in most pastoral and agropastoral livelihoods of Northern regions. In February–June 2015 analysis, most livelihoods (most parts of Hawd, Sool Plateau and Karkar/Dharor) of Northeast and Hawd, West Golis/Guban and East Golis of Northwest were classified as **Minimal** (IPC Phase 1), while other livelihoods were categorised as **Stressed** (IPC Phase 2). The improvement of food security situation in most pastoral livelihoods of the northern regions is attributed to increased milk availability for consumption following sheep/goat and camel reproduction in *Deyr* 2014, favourable livestock prices and relatively stronger purchasing power of pastoralists (ToT between local quality goat and rice) compared to a year ago.

During *Jilaal*, as a result of average to above average *Deyr* rains and early start of *Gu* 2015 rains (3rd dekad of *March*) in most parts of northern regions the dry season was relatively mild. However, significant deterioration of pasture and water occurred in the rain-deficit areas of north such as parts of Hawd (Burao, Odweyne), Sool Plateau (Sanag) and localized areas of East Golis (Qandala) and Hawd/Addun (north Mudug) between 2nd dekad of February and 2nd dekad of March 2015. This led to 30-45 days of water trucking, hence increased water prices in the above-mentioned areas. For instance, water prices exhibited significant increase in most of the rural markets of northern regions such as Sanag (15%), Nugal (24%), Sool (80%) and, most considerably (96%), in north Mudug (Jariban district) due to below average to poor *Deyr* 2014/15 rains. However, early *Gu* 2015 rains partially alleviated the severity of the *Jilaal* in the rain-deficit areas, although a complete recovery will very much depend on the performance of *Gu* rains in April/May 2015.

During *Jilaal*, livestock migration was largely normal, confined to dry season grazing areas. However, hasty livestock movements/migration from rain deficit areas to early rained areas occurred in most livelihoods. Livestock body conditions remained average (PET score 3) in most of the northern regions with the exceptions of the rain-deficit areas and lactating animals with below average to poor (PET score 2-1) body conditions. Medium rate of lambing/ kidding of sheep/goat started in March 2015 following conception in *Deyr* 2014. 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 2015 this year. Milk production seasonally declined during the *Jilaal* period, but is expected to improve in the course of *Gu* 2015 season subject to normal rainfall performance.

Poor households in agropastoral areas of Northwest (Wooqoi Galbeed and Awdal regions) had sufficient cereal during *Jilaal* (up to March 2015) despite the below average *Gu/Karan* 2014 cereal production (70% of PET average 2010-2013). Conversely, no cereal stocks were available to poor households of Togdheer district due to a complete crop

Figure 6: Regional Trend in Terms of Trade Cereal to Goat (North)



Average body condition. Coastal Deeh, Iskushuban District, Bari region, FSNAU, March 2015

failure during *Gu* 2014 season (poor rains). Currently, there are no crops or grass fodder available to poor households in the agropastoral areas, who are market-dependent for cereal purchases.

In the first quarter of the year 2015, the local quality goat prices either remained stable or declined marginally in most markets of the Northeast, but they increased in the Northwest, most significantly (17%) in Hargeisa market. On the other hand, rice prices remained stable or declined marginally in most of the northern regions. In the Northwest, the ToT between local quality goat and imported rice increased by 5kg/ head from the beginning of the year to reach 65kg/head in March 2015. The ToT local quality goat/ white sorghum has also increased (by 8kg) to 85 kg/head in March 2015. In the Northeast, the ToT between local quality goat and imported rice has been stable at 78kg/ head in the same period of comparison (Figure 6). The average ToT between local quality goat and red sorghum in Northeast stood at 66kg/head in March, which is stable compared to January 2015. In March 2015, the highest ToT between local quality goat and rice was recorded in Bossaso (110 kg/head) due to lower rice prices in the port-town as compared to other inland markets of the region. The lowest ToT between goat/rice (48 kg/head) was recorded in the isolated and remote district of Zaylac due to higher rice price and lower goat prices compared to other northern markets. On a yearly basis, the ToT between local quality goat/rice and local quality/ white sorghum remained stable in the Northwest at 65 kg/head and 85 kg/head respectively. In the Northeast, the ToT between goat/rice and goat/ red sorghum declined annually (by 6 kg each), to 78 kg/head and 66 kg/head respectively, mainly due to decline (8%) of goat price.

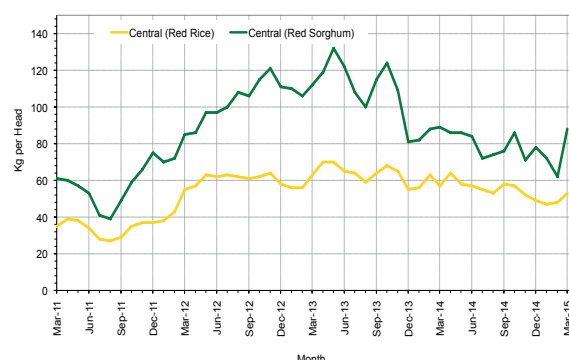
Central Regions

The food security situation has improved in the post-*Deyr* 2014/15 in central regions when compared to the post-*Gu* 2014. Between February and June 2015, most rural livelihoods are classified as **Stressed** (IPC Phase 2) with the exception of Hawd of North Mudug, which is categorised as **Minimal** (IPC Phase 1). The improvement of food security situation in most livelihoods in the central regions was a result of average rainfall performance, which led to increased availability of pasture and water, households' own production (milk, meat and cowpea crop) as well as declined prices of imported foods (rice).

During this *Jilaal* dry season, dry pasture was available in large parts of Cowpea Belt, Coastal *Deeh* and parts of Hawd and Addun. Nevertheless, the dry season was harsh in rain-deficit areas of Central regions, including parts of Hawd and Addun (Dhusamareb, Adado and southeast of Galkayo) where *Deyr* 2014/15 rains were poor resulting in poor pasture/browse and severe water shortages. Water trucking was the only source of water for many households from early February to late March in the above-mentioned areas, as berkads and natural water catchments have dried up. As a result, water prices have surged in the rural markets in the rain-deficit areas between Dhusamareb and Adado districts (by 38 percent in Balanbale in Hawd and by 27 percent in Gadon in Addun). However, early moderate *Gu* rains received in the third dekad of March 2015 in the most of the rain-deficit areas and other livelihoods (apart from Coastal *Deeh*) improved pasture/browse and water up to some extent and prompted livestock migration towards better rained areas.

Near average livestock body conditions (PET 3) reported in Coastal *Deeh* and Cowpea Belt livelihoods and below average to poor (PET 2 -1) in the rain-deficit areas with gradual improvement expected as the *Gu* rains progress. Generally, milk availability and access have seasonally declined due to reduced pasture/browse and water, as well as the low camel calving tolls during *Deyr* 2014 rainy season. As a result, the price of camel milk in Hawd and Addun markets increased (3% and 15% respectively) in the first quarter of the year and a year ago, but were still lower (by 10%) compared to five-year average (2010 -2014). Milk availability is projected to increase during the *Gu* rainy season as some camel calving expected in May-June 2015. Furthermore, kidding/lambing that commenced at the end

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



Poor body condition. Addun, South Galka,yo, Mudug Region, FSNAU, March 2015

of the *Jilaal* (March 2015) season is expected to increase over the course of the *Gu* rainy season (April-May 2015). In the Cowpea Belt, cowpea stocks of poor households lasted up to March 2015 due to near average (80% of 3 year average) *Deyr* cowpea production, but as from April 2015 they will resort to cereal purchase. On the other hand, seasonal agricultural activities including land preparation and dry planting for *Gu* 2015 season started in March 2015. Major crops planted include cowpea, followed by sorghum. Early light to moderate rains received in parts of Cowpea Belt livelihood in the third dekad of March 2015 have led to seed germination in some areas.

In January-March 2015, the local quality goat prices increased seasonally in the Coastal *Deeh*/Cowpea Belt (by 17%) and Hawd/Addun (by 8%) 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 (June 2015). Rice prices were stable in all livelihoods in the same comparison period. Reflecting the trends in livestock and cereal prices, the ToT between local quality goat and rice increased moderately (by 8 kg) in the Coastal *Deeh*/Cowpea Belt since the beginning of the year, reaching 55 kg/ head in March 2015. Similarly, in Hawd and Addun livelihoods (Dhusamareb, Galkayo and Abudwaq districts) ToT has also increased (by 4 kg) to 52 kg/head in March 2015 (Figure 7). The annual comparison indicates stable ToT in *Cowpea Belt* and *Coastal Deeh* but it declined (7 kg) in *Hawd* and *Addun* mainly as a result of yearly livestock price declines (15%) in these livelihoods. On the other hand, the ToT between local quality goat and red sorghum increased moderately (16kg) in all livelihood zones of Central in the first quarter of the year, but remained unchanged compared to the same time last year. In March 2015, the average ToT local quality goat to red sorghum was equivalent to 88kg/head in all livelihoods of Central regions. The ToT local quality goat to cowpea either remained stable (Haradhere - 60 kg/head) or increased (by 11kg in Eldher – 84kg/head) in the first quarter of the year, mainly due to increase in goat price (21%).

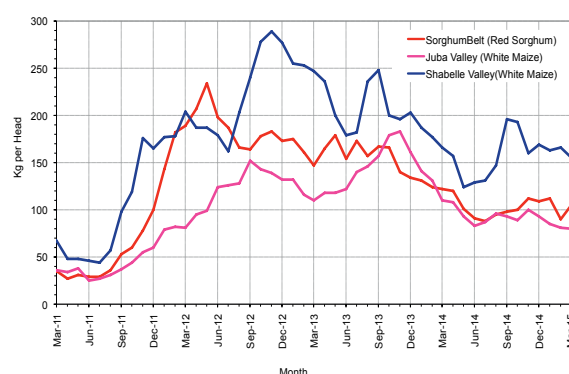
Southern Regions

In the post-*Deyr* 2015 (February-June 2015), the food security situation in most rural livelihoods of southern regions is classified as **Stressed** (IPC Phase 2) with the exception of the riverine livelihoods of Middle and Lower Juba regions and Southern Agropastoral livelihood of Middle Juba which are classified in **Crisis** (IPC Phase 3), while the Bay Agropastoral High Potential categorized as **Minimal** (IPC Phase 1). The projections for IPC classification were based on the assumptions of average/ below average *Gu* rains, normal off-season crop harvest and *Gu* 2015 farming activities, improved livestock production and cereal stock availability at household level in most of the farming areas.

Based on the latest assessment results (March 2015), the off-season crop estimates indicated somewhat lower output of maize in Middle Juba (20%) and Gedo (14%) regions compared to earlier projections made in January 2015 (see *Agriculture sector*). However, on average, maize harvest of *Deyr* 2014/15 plus off-season is 11 percent above the long-term average (1995-2013) and slightly (13 percent) below five-year average (2009-2013) for the three regions. This indicates that the offseason maize production was average and harvests are contributing to local cereal availability at the household and market levels. Farmers were relying on cereal stocks from last season's harvests, although supplies were starting to run low, as usual for this time of year. Farm labor demand from January to March was low in most rural areas during lean season when agricultural activities were limited with exception of the harvesting of cash crops and offseason harvests in riverine areas. However, the demand is expected to improve from April to June, with the effective start of *Gu* farming seasonal activities (land preparation, planting and weeding).

The assessment indicated that the pasture condition have deteriorated from January as hot, dry *Jilaal* season progressed and due to early cessation of *Deyr* rains in some livelihoods (Lower Juba, Middle Juba and Hiran), which has put pressure on the existing pasture and water. Thus, significant water shortages were reported in the pastoral areas of Lower Juba (Hagar district) and Hiran region (Hawd livelihood). This situation led to worsening of livestock body

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

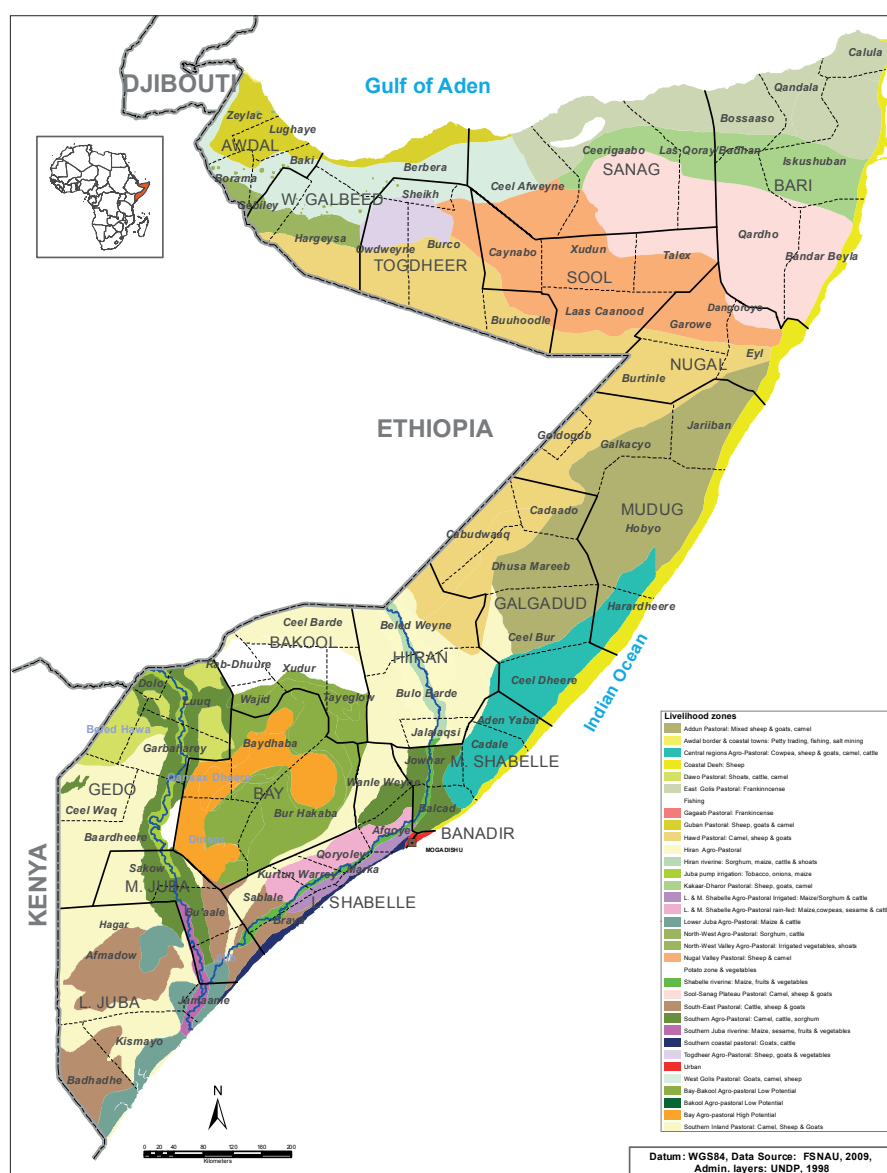


Maize off season harvest. Riverine Livelihood, Dolow, Gedo region, FSNAU, March 2015

conditions and elevated susceptibility to diseases. However, due to early *Gu* rains in second/third *dekad* of March, the pasture condition has improved in some regions. In the regions of Bay, Bakool, Gedo, Lower Shabelle, Middle Juba and Middle Shabelle, the dry season was relatively mild with pasture and water available in most livelihoods. In general, pasture condition is currently estimated to be near or below average in most pastoral livelihoods. Livestock body condition currently is considered average throughout the regions. No reports of severe pests or livestock disease outbreaks were reported.

Overall agricultural activities in the rural areas have created increased job opportunities for poor households in riverine and agropastoral areas of southern Somalia and it is likely to increase further in the coming months. As a result, the purchasing power of poor households measured through ToT between daily labor wage rate and cereals have increased slightly (8%) in March 2015 compared to the previous month and the same month last year in the Sorghum Belt regions. However, the ToT between agriculture labour and cereals indicated mixed trends in different regions during the last three months (January-March), showing increases in Gedo (25%), Bakool (20%) and Juba valley (13%), decreases in Shabelle valley (25%) and Bay (6%). In March 2015, the highest ToT (15kg) was recorded in Bay and Gedo regions, while the lowest was in Middle Shabelle (5kg). In the first quarter of the year, the ToT between local quality goat and local cereals decreased seasonally in all southern regions by 4 -7 percent (Figure 8). In March 2015, the lowest ToT was reported in Bakool (62Kg/goat) and Hiran (77kg/head) regions, while the highest ToTs were recorded in the major cereal-producing regions of Bay (232 kg/head) and Lower Shabelle (154kg/head). Compared to a year ago, the ToT between local goat and local cereals has decreased in Bay (30%), Juba (27%), Bakool (24%), Hiran (19%), Shabelle (13%) and Gedo (5%) regions due to increase in cereal prices (resulting from tight supply due to reduced humanitarian assistance and trade disruptions attributed to insecurity) and decline in livestock prices.

SOMALIA LIVELIHOODS ZONE MAP



Recent publications and releases

- *FSNAU Post Deyr 2014/15 Food Security and Nutrition Technical Report, March, 2015*
- *FSNAU Post Deyr 2014 Nutrition Technical Report, March 2015*
- *FSNAU Post-Deyr 2014 Food Security and Nutrition Outlook (February to June 2015), February 2015*
- *FSNAU Climate Update, March 2015*
- *FSNAU Market Data Update, March 2015*
- *FSNAU Presentation of the key findings from the 2014/15 post-Deyr Seasonal Food Security and Nutrition Assessment in somalia, January 2015*
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