

**Climate**

**Civil  
Insecurity**

**Livestock**

**Agriculture**

**Markets**

**Nutrition**

**Integrated  
Analysis**

**KEY**

**ISSUES**

As a result of the prolonged harsh Hagaa (July – September), followed by delayed and significantly below average *Deyr* (October–December) rains in many parts of Somalia, food security of poor pastoral households has deteriorated since July 2016 (Maps 4 and 5). Particularly, the acute food security Crisis (IPC Phase 3) in Northern Inland Pastoral (NIP) of Bari and Nugaal regions deepened and expanded to NIP of Sool and Sanaag Regions which was previously classified as Stressed (IPC Phase 2). Similarly, Hawd pastoral of Woqoyi Galbed, Togdheer and Sool regions, and Southern Inland pastoral of Juba also deteriorated from Minimal (IPC Phase 1) to Stressed (IPC Phase 2). Acute food insecurity will persist in most parts of Somalia while further deterioration is expected in many parts of the country. As a result, moderate to large increases in the overall number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) are expected through the first half of 2017. Although many areas will remain Stressed (IPC Phase 2), several others will deteriorate to Crisis (IPC Phase 3).

As a result of sustained moisture stress less than 40 percent of total planted area is expected to be harvested from all southern Somalia cereal producing regions. Well below-average to poor crop production is expected in the main cereal producing regions of Lower Shabelle and Bay which normally account for over two-thirds of the *Deyr* cereal production in southern Somalia, largely because of below average to poor *Deyr* rains. Similarly, domestic production of cereals is expected to be well-below average to poor despite above average Gu-Karan harvest in the northwest. FSNAU preliminary estimate indicates that overall *Deyr* 2016/17 cereal production is expected to be 60-70 percent below the five year average (2011-2015) and 50-60 percent below the long-term/Post-War average (1995-2015). Continued and further deterioration in food security conditions are expected through the first half of 2017 in most of the agro-pastoral areas in south-central and parts of the pastoral areas in the north and central regions of Somalia.

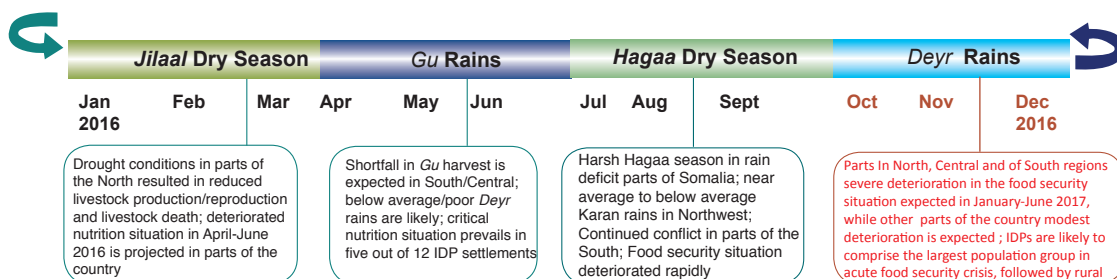
Since August 2016, water trucking has been widespread in most of the Berkad dependent pastoral livelihoods in northern Somalia (NIP, Hawd, Addun, East Golis and Togdher agropastoral) and central regions (Hawd and Addun livelihood zones), as most surface water catchments did not replenished well. Livestock body conditions are largely below average to poor (PET Score 2-1), owing to poor pasture, water crisis, limited migration option and drought induced diseases. According to field reports from NIP, there is high livestock off-take (death and distress sell). Most animals are concentrated near permanent water points, where large number of livestock carcasses are observable. Livestock holding of all wealth groups have reduced in most livelihoods in the north and parts of southern Somalia. Significant livestock loss has been reported in NIP livelihood and further decline is expected through Jilaal (January-March).

Generally, livestock reproduction is expected to diminish for all species. Herd growth and milk production are in declining trend due to successive poor seasons, prolonged Hagaa (July-September) and failure of *Deyr* rains. Livestock abortion owing to poor feeding, disease, culling and death of offspring, lactating and weak animal compounded high off take. Consequently, pastoral dropout and destitution reported in large parts of NIP in Bari, Nugal, Sanag and Sool regions. During Jilaal extreme pasture and water shortages could be expected in large parts of north and central regions as well parts of southern Somalia particularly Gedo, Bakool, Hiran, Middle Shabelle and along the coast from south to north.

Finding from the 2016 Post *Deyr* nutrition assessment indicate Critical levels of Global Acute Malnutrition-GAM ( $\geq 15\%$ ) in five out of 12 IDP populations surveyed. These are Mogadishu and Dhusamareb IDPs in south-central region and Bossaso, Garowe and Qardho in northeast region. Despite some improvements in the nutrition situation (GAM) among IDPs in Dolow, Dholeb, Baidoa, Kismayo and Berbera, rapid deteriorations were noted since July 2016 among Mogadishu IDPs (14.7% to 16.6%) Dhusamareb IDPs (10.1 % to 26.4 %) in south-central region and Qardho IDPs (12.6 % to 15.2 %) in northeast region.

The worsening nutrition situation among Mogadishu, Dhusamareb and Qardho is partly linked to limited access to humanitarian interventions, unstable casual labour for income to purchase food, high morbidity, low immunization coverage, continuous arrival of new IDPs and on-going evictions particularly among Mogadishu IDPs. Nutrition interventions should be prioritized to displaced population and accompanied by efforts to reduce high morbidity and improving health services. Across the 12 IDPs surveyed in Somalia the *Deyr* 2016 assessments identified a total of 18 450 acutely malnourished children which include 4 200 who are severely malnourished.

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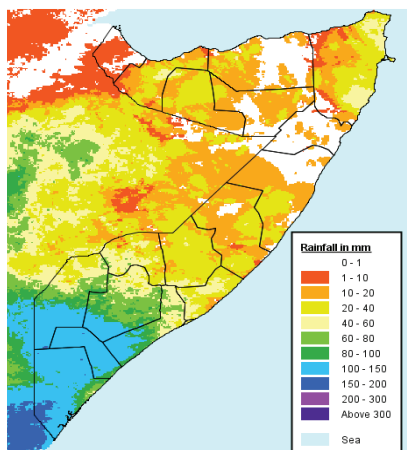
**Somalia Seasonal Timeline & Key Events**

The Consumer Price Index (CPI) for urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), exhibited slight increases (1-6%) across the country over the last five months (July-November). This reflects the increase in the local currency prices of the key commodities that make up the bulk of the consumer basket such as cereals (red sorghum) and sugar. The anticipated poor *Deyr* harvest (January-February 2017) is likely to exert a further upward pressure on the cost of living until the next harvest in July/August 2017. This trend could be exacerbated by security conditions, particularly in southern parts of the country. Trade disruptions due to insecurity continued in some urban areas of Bakool (Huddur and Wajid districts) and Hiran (Bulo Burto district) where access roads remain under insurgent control. Cereal price trends in the subsequent period (April-June 2017) will be influenced by such factors as the 2017 *Gu* rainfall performance, which is yet uncertain, as well as humanitarian relief interventions. Continued humanitarian interventions and early actions are necessary at least up to mid-2017 in order to address the rising level of acute food insecurity in Somalia.

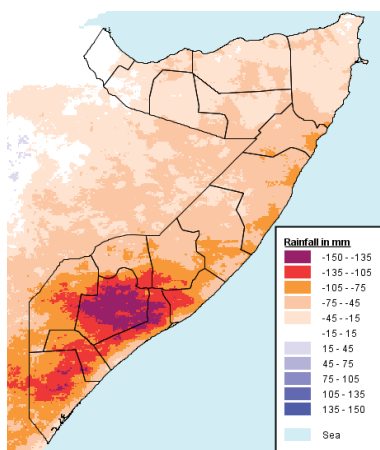
## SECTOR HIGHLIGHTS

### CLIMATE

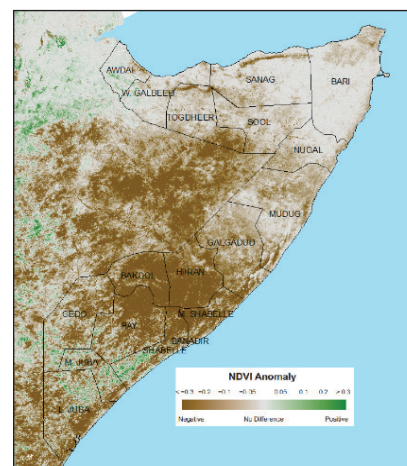
**Map 1: 1 Oct- 20 Dec 2016 Total Seasonal Rainfall (mm)**



**Map 2: 1 Oct-20 Dec 2016 Total Seasonal Rainfall Anomaly (mm) from Short-Term Mean (1999 -2015)**



**Map 3: 10-20 Dec 2016 NDVI Anomaly from Short-Term Mean (2001- 2015)**



In general, *Deyr* (October-December) rains were below average across most parts of Somalia (Maps 1 and 2). In October, which is normally the peak of *Deyr* rains, only localized areas received 10-25 mm of rains. However, in mid-November, light to moderate rainfall precipitated in most southern areas. Likewise, moderate rainfall was reported in many parts of Awdal and Woqoi Galbeed regions in the northwest. These rains partially replenished water sources and are also expected to support pasture regeneration and crop development. In contrast, limited rainfall has been observed in central and northeastern regions.

In the northern and central regions, rains started timely, second dekad of October in some areas although, Sanaag, Sool and Nugaal regions remained largely dry during between October and late December. Mostly, the northwest Agropastoral, Hawd and West Golis Pastoral livelihood zones in Awdal and Woqooyi Galbeed regions received 20-40mm of rains between October and late December. Guban pastoral livelihood zone in the northwest that usually receives only Hays (December-January) rains received some uncommon rains in the middle of October and late November which have been favorable for the rangeland resources. However, in central agropastoral (Cowpea Belt), Addun, Hawd and Coastal Deeh pastoral livelihood zones in Galgaduud and Mudug regions, the rains have been generally well below-average. Some light to moderate rains were also reported in very localized areas in East Golis, Coastal Deeh and Northern Inland Pastoral livelihood zones in Bari, Sanaag and Sool regions during the course of the *Deyr* season.

In the South, the *Deyr* 2016 seasonal rainfall commenced in good time from mid-October but performed poorly in terms of frequency, distribution and amount. In October, rains were largely erratic in terms of intensity, temporal and spatial distribution for all livelihood zones in southern Somalia. Light rains were prevalent during the start of the season for parts of Bakool and Hiraan and pockets in Bay, Gedo, Juba and Shabelle regions but later intensified in Juba and Bay, parts of Lower Shabelle, Gedo and localized areas in Bakool and Hiran regions during the month of November. Most areas received cumulative amounts of 25-150 mm rainfall. Overall, the enhanced rains partially replenished water sources and supported pasture rejuvenation and crop development in rained areas in southern Somalia. However, coastal areas in southern Somalia and a large part of agropastoral and pastoral livelihoods in Hiraan and Bakool received relatively lesser amounts of rainfall (25-50% of average).

Some rainfall in the upper river catchments of Ethiopian highlands between October and November improved Shabelle and Juba River levels and led to enhanced crop irrigation in the riverine livelihoods in Gedo, Hiraan, Lower and Middle Shabelle regions.

Vegetation cover measured through Normalized Difference Vegetation Index (NDVI) for 11-20 December, indicates considerably below average vegetation conditions across many parts of Somalia, with high vegetation deficits prevalent in central and southern Somalia (Map 3). However, near average vegetation conditions are observed in parts of Northwest Agropastoral, Hawd and West Golis Pastoral livelihood zones of Awdal and Woqooyi Galbeed regions as well as pocket areas in Lower Shabelle, Middle Juba and Lower Juba.

## **CIVIL INSECURITY**

Between August and December 2016, the civil insecurity situation of the central and southern regions of Somalia remained volatile leading to intensive military engagements, violent insurgency (suicide bomb explosions, land mines, targeted killings) and magnificent population displacement. The capital city of Somalia (Mogadishu) remained the epicentre of violent incidents followed by other regions (Hiran, Gedo, Bay, Bakool and Lower Juba) in southern Somalia.

Reports indicate new waves of displacement and conflict in most central and southern regions from August through November. Politically motivated conflicts between Gal-Mudug and Puntland, have relatively calmed down after five to six weeks of fierce fighting. The situation remains calm but tense following rounds of efforts by Federal governments of Somalia and other international partners including IGAD to have the conflict resolved. The conflict resulted in loss of life (both civilian and combatant) and widespread displacements of people to rural areas and other neighboring towns. Additionally insurgency activities have resulted in widespread displacement from Qandala town of Bari region while forceful collection of zakat by insurgents in Harardheer district (Baxdo and Dumaayo villages) resulted in fierce fighting when the communities revolted against the coercion. On the other hand, the withdrawal of African Union Mission in Somalia/AMISOM and local troops from locations in Bakool, Galgadud and Hiran regions has led to the disruption of ongoing humanitarian activities and displacement of more people for fear of retaliation by insurgents on suspicion of collaboration with AMISOM government forces. Clan conflicts have persisted in Lower Shabelle regions (Merka district) that contributed to displacements, deaths and loss of properties (villages destroyed and houses burnt). Localised clan conflicts also continued in Belet-weyn district of Hiran region but had minimal impact in terms of population displacements.

In some parts of southern Somalia market disruptions have persisted due to continued conflict as commercial supply routes are interrupted. In turn, supply shortages have led to price increases in Dinsor, Qansahdhere, Buloburte and major market of Bakool (Hudur/Wajid). However, the withdrawal of troops and subsequent takeover by insurgents presented additional challenges of access in the already hard to reach areas.

## **AGRICULTURE**

Based on the FSNAU *Deyr* 2016 preliminary assessment results (November 2016), the area planted under cereals (maize and sorghum) is far below average in all southern regions of Somalia. The main driving factors were delayed onset of *Deyr* rainfall, with poor intensity and distribution, coupled with low river water levels and pest damages. As *Deyr* rains are usually expected to taper off towards early December, recovery of the most rain-fed and riverine crops is very unlikely and overall cereal production prospects are highly unfavorable in most Southern regions. However, maize crops that survived the moisture stress are now in the development stage and are mainly found along riverine areas of Shabelle regions, due to availability of irrigation and some favorable rains in the first half of November. Most of these crops (maize and sorghum) are expected to be harvested from late January to February 2017. As a result of sustained moisture stress less than 40 percent of total planted area is expected to be harvested from all southern Somalia cereal producing regions. Overall *Deyr* 2016/17 cereal production is estimated (preliminary) to be 60-70 percent below the five year average (2011-2015) and 50-60 percent below the long-term/Post-War average (1995-2015).

The *Deyr* 2016 planted area in Lower Shabelle which is a major maize basket of Somalia, is far below average. This is attributed to poor *Deyr* 2016 rains, renewed conflicts and stiff irrigation competition (due to low river levels) – leading to a significant decline in cropped area and expected cereal harvest compared to average. Despite improved weather conditions later in the season (early to mid-November), expected yield gains are not sufficient to offset the contraction in planted area. Significant decline in area planted is reported in maize producing areas of Kurtunwarey, Sablale and Barawe. Exceptions are riverine areas of Qoryoley, Marka, and Afgoye where maize harvest is likely to be near average. Similarly, near average harvest of sorghum is expected in sorghum high potential agro pastoral livelihood of Wanla-weyn, which is among the few areas that received near average rains in the Shabelle valley.



In Bay region, which is a major sorghum producing area, planted area is also expected to be significantly below average, due to poor and below average rains and the reported pest damages. Consequently, the expected cereal production in Bay region is likely to be well below average to poor.

Crop production outlook is either poor and /or failed in the agro pastoral livelihood zones of Hiran, Bakool, Middle Juba, Lower Juba, Middle Shabelle and Gedo regions due to poor and erratic *Deyr* rains, compounded by high temperatures. Most of the agro pastoral areas have experienced widespread germination failure and/or severe moisture stress at early vegetative stages. Riverine livelihood zones in Hiran, Middle Juba, Lower Juba, Middle Shabelle and Gedo regions were also affected substantially. Rains have generally been erratic and below average, with intervals of long dry spells which coincided with critical vegetative stage of crops. The prospects of the cereal harvest in riverine areas in these regions will most likely be insignificant, even much worse than the Lower Shabelle riverine areas. Farmers in riverine areas normally cultivate crops on flooded land along Juba and Shabelle rivers when flood waters start to recede. Significant off-season crop harvests are not expected from the major off-season producing areas of Juba, Shabelle and Gedo regions due to limited flooding during the current *Deyr* season. As a result, limited off-season cereal harvest is expected in February-March 2017. Similarly, other crops (sesame, cowpea, vegetables etc.) are likely to perform poorly as a result of delayed and poor precipitation of the *Deyr* rains.

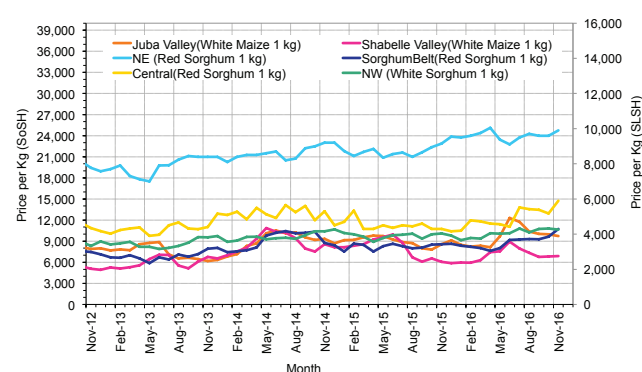
According to the recent FSNAU/ Ministry of Agriculture Gu-Karan crop assessment (November 2016) in the Northwest Agropastoral (Hargeisa, Gebiley, Baki, Borama districts) about 37 500 tonnes of cereals (92% white sorghum and 8% yellow maize) were harvested. This estimate is less compared to the FSNAU projections made in July 2016, as a result of near to below average Karan rains, declined planted area and cereal yield. Also parts of the established crops were used as fodder for livestock from rain. However, the Gu-Karan 2016 production is still higher by 68 percent compared to last five years PET average (2011- 2015).

In southern Somalia as most poor households are currently dependent on market purchase, the expected harvest will not be enough to lessen cereal stocks shortfall at household level. In the major cereal producing regions of Shabelle and Bay, cereal stocks among poor households are expected to be fully consumed within a month (up to February 2017). The harvest shortfall will trigger an early start of the lean season and push cereal prices higher, starting from February 2017.

However, local cereals are available in most markets, due to *Gu* 2016 available stocks, with additional recent off-season harvests (September/October), and release of carry-over stocks by most middle and better-off wealth groups have contributed to a reduction in white maize prices in Juba markets by 14-19 percent and in Middle Shabelle markets by 29 percent between July and November 2016. On the other hand, sorghum prices have increased in Hiran (30%), Bay (26%), and Gedo (15%), Bakool (14%) and Central (7%) markets over the same period, due to anticipation of poor *Deyr* 2016 harvest. In November 2016, both maize as well as sorghum (white/ red) prices showed substantial increases (10-53%) from levels observed a year earlier in most southern and central Somalia markets as well as from the average for the previous five-years (13-25%). Sorghum prices remained stable in northern markets since July but prices were still slightly higher compared to last year as well as the five-year average.

The increase in cereal prices in most parts of southern and central Somalia are attributable to a combination of factors such as consecutive seasons of below average cereal production, trade disruptions due to intensified conflict in southern regions in the current year as well as limited access to humanitarian assistance.

**Figure 1: Monthly Trends in Local Cereal Prices**



*Established Sorghum, Agropastoral Sorghum High Potential, Wanla -Wayn – L.Shabelle, FSNAU, November 2016*

## LIVESTOCK

As a result of below average to poor Hagaa/Karan (July-September) and *Deyr* rains (October-December 2016), pasture/browse and water condition are largely below average to poor in most livelihoods of the country. The areas mostly affected include the entire Bari, Nugal, Sanaag and Sool regions of north, large parts of Mudug, Gal-gadud (Central), Hiran, Middle Shebelle, Bakool and Gedo in southern regions. From August 2016, extensive water trucking with increasing prices has been going on in most of the Berkad dependent pastoral livelihoods in north (Northern Inland Pastoral, Hawd, Addun, East Golis and parts of Togdher agropastoral), as most surface water catchments (Berkads and dams) did not get replenished. Conversely, there are areas mostly in the south that have received near average late rains (November) which improved rangeland condition. However, heavy livestock concentration from other rain deficit areas/regions has caused early depletion of the available resources. This includes large parts of Lower Shebelle, Bay, Juba and large parts of Togdheer, Awdal and Waqoyi Galbeed regions in the north. Additionally, unusual rains in late October till November 2016, improved rangeland conditions of the drought affected Guban pastoral livelihood in Awdal region which attracted large livestock population from the rain deficit/drought areas within northwest regions.

Extensive inter and intra-regional livestock migration is prevalent in many parts of the country. Hasty abnormal mechanized migration of livestock from rain deficit/drought areas to other areas with better pasture has been reported in large parts of northern and central regions. Livestock body conditions for all species are poor to below average (PET score 1-2) in most of the country due to extreme deterioration of rangeland conditions. However, field reports indicate near average to average body conditions (PET 3) in few areas that received relatively better rains.

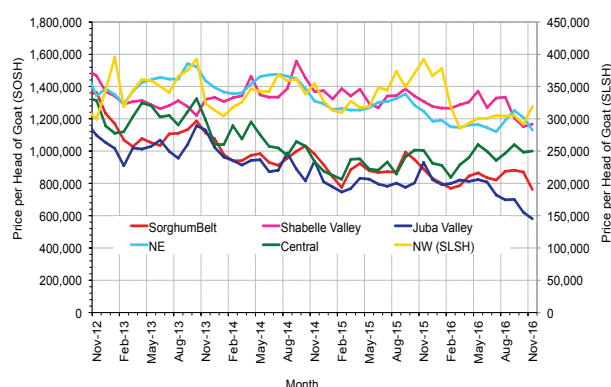
Low to medium calving, kidding/lambing are reported between August to November in parts of southern and central Somalia. Herd growth and milk production are poor with declining trend due to successive poor seasons, prolonged Hagaa and poor *Deyr* rains. Increased abortions owing to poor feeding, disease, culling and death of offspring, lactating and weak animals led to reduction in herd size being reported in parts of north and southern regions. Consequently, pastoral dropout/destitution have been reported in large parts of NIP in Bari, Nugal, Sanag and Sool regions.

Poor households' holding of big ruminants mostly show stable to mild declining trends in most livelihoods. However, decreasing trend of sheep/goat is expected in most livelihoods in the north (Guban, NIP, East Golis, Addun, Coastal deeh), central (Cowpea Belt, Coastal Deeh) and south (Southern Agropastoral of Hiran, Gedo and Juba regions) with likely below baseline herd sizes.

Moreover, over the coming six months (January – June 2017), a sharp decline in livestock holding among poor households is expected in most parts of the country due to unfavorable *Deyr* rains and likely below average *Gu* 2017 (April-June) rains.

Local quality goat prices exhibited mixed pattern between July-November 2016, mostly mild to moderate increases (9-19%) in the north and central due to reduced availability of salable animals, but a moderate decline in southern markets (11-29%). Across all regions of Somalia, current (November 2016) livestock prices are lower than price levels one year ago (November 2015). Livestock (local goat) prices in November 2016 also showed a moderate decline in most of the regional markets with highest decline of 40 percent seen in Juba regions compared to the average for the previous five-years.

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



*Below average body condition, Hawd, Burao, Tog-dher regions, FSNAU, November 2016*

## MARKETS AND TRADE

### Exchange Rate Trends

From July to November 2016, the Somali shilling (SoSh) depreciated against the United States Dollar (USD) in most Somali Shilling using markets. In the South, the shilling depreciated by four percent due to the ongoing political events including elections which have dampened investment in different sectors of the economy. In the northeast (Bossaso and Garowe markets) the shilling lost modestly by 9 percent over the same period (July-November) on what many traders attribute to printing of new notes by the Puntland authority. By November, the retail exchange in Bakaara market (Banadir region), for example, quoted the SoSh at a monthly average of SoSh 23 525 per USD, while Northeast markets (Bosaaso and Garowe) recorded an average of SoS 26 187 per USD.

The Somali Shilling depreciated significantly (16-21%) in the northeast (Bossasso and Garowe) over the past one year as well as compared to the five-year average driven primarily by increasing supply of new notes in the local markets. In other Somali Shilling using areas the shilling was stable over the same periods. In the Northwest, the Somaliland Shilling (SiSh) to USD exchange rate was relatively stable across most since November 2015. However, the SiSh lost nearly 13 percent against the USD compared to 5-year average. The depreciation has been attributed to reduced availability of USD following low livestock export demand from the region due to droughts.

### Cereal Imports and Commodity Price Trends.

The prices of imported commodities (rice, wheat flour, sugar and vegetable oil) prices were either stable or changed at mild rates in most markets since July 2016 as a result of ample supplies from world producer regions and low price of fuel. Annual price changes in Somali Shilling (SoSh)-using markets indicate imported commodities are either stable or increased with Middle Shebelle recording the highest increase in sugar prices. This is attributed to production shortfall in Brazil, a leading producer.

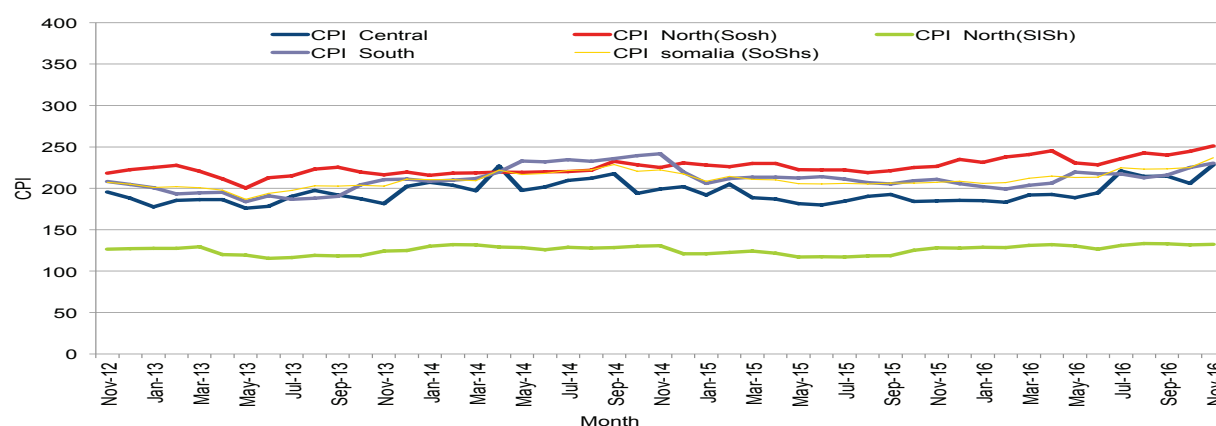
Food markets are expected to remain generally well supplied during the first quarter of 2017 as imports are available at relatively low and more stable international prices, especially for cereals (rice and wheat flour). Supplies from the 2016 *Deyr* harvest are likely be exhausted fast this in turn is likely to put an upward pressure on prices of local cereals as of February.

Cumulative July to October 2016 import (2 821 MT) of sorghum and maize from Ethiopia to central and northern Somalia increased by 48 per cent when compared to July–October 2015. The increase was due to low local cereal availability and high prices especially in the central and northern markets as well as reduced flow from southern Somalia where July *Gu* 2016 productions was below average. In addition, some (39 710 tonnes) of different food items mainly Pasta, sugar, wheat flour and rice imported through the ports of Bosaso, Berbera and Mogadishu of Somalia were re-exported to Ethiopia and Kenya which was nearly 15% higher when compared to the same period (July-November) last year. The increase is due to lower international prices of these items and increased demand from neighboring countries.

### Consumer Price Index (CPI)

The Consumer Price Index (CPI) for urban households, measured through changes in the cost of items in the Minimum Expenditure Basket (MEB), exhibited slight increases (1-6%) across the country over the last five months (July-November 2016). This reflects the increase in the local currency prices of the key commodities that make up the bulk of the consumer basket such as cereals (red sorghum) and sugar. Similarly, over the past one year, the index is significantly elevated (9-24%) in the SoSh using areas due to the same reasons above; while it slightly increased by four percent in SiSh using areas. Compared to five-year average, both SoSh and SiSh recorded increase (5-10%) in CPI attributable to increase in red sorghum prices.

Figure 3: Monthly Trends in Consumer Price Index (CPI)



## NUTRITION

Post *Deyr* 2016 assessment results, indicate an improvement in nutrition situation (Global Acute Malnutrition-GAM) among IDPs in Dolow, Dhobley, Baidoa, Kismayo and Berbera while rapid deterioration was noted since July 2016 among Mogadishu IDPs (14.7% to 16.6 %) Dhusamareb IDPs (10.1 % to 26.4 %) in south-central region and Qardho IDPs (12.6 % to 15.2 %) in northeast region. Critical levels of GAM ( $\geq 15$  %) were observed in five out of 12 IDP populations surveyed during *Deyr* 2016 assessment. These are Mogadishu and Dhusamareb IDPs in south-central region and Bossaso, Garowe and Qardho in northeast region. It is also of concern to note that nutrition situation among IDPs in Garowe & Bossaso is sustained as Critical over the last two years or more. Serious GAM levels ( $\geq 10$  and  $< 15$  %) were recorded among IDPs in Dolow, Dhobley, Kismayo, Baidoa and in south-central region, and Hargeisa and Burao IDPs in northwest. Alert levels of GAM ( $\geq 5$  % and  $< 10$  %) were seen only in northwest among Berbera IDPs.

The worsening nutrition situation among Mogadishu, Dhusamareeb and Qardho is partly linked to limited access to humanitarian interventions, unstable casual labour for income to purchase food, high morbidity, low immunization coverage, continuous arrival of new IDPs and on-going evictions particularly among Mogadishu IDPs. Nutrition interventions should be prioritized to displaced population and accompanied by efforts to reduce high morbidity and improving health services.

Across the 12 IDPs surveyed in Somalia the *Deyr* 2016 assessments identified a total of 18 450 acutely malnourished children which include 4 200 children that were severely malnourished.

## INTEGRATED FOOD SECURITY ANALYSIS

### URBAN

FSNAU Post-*Gu* 2016 analysis projected that most of the urban populations across Somalia will face Minimal or Stressed acute food insecurity (IPC Phases 1 or 2), except urban areas of Bakool (Hudur and Wajid) and Hiran (Buloburte) regions in southern Somalia, which faced acute food security Crisis (IPC Phase 3) through the end of the year (August –December 2016) due to the continued adverse impact of trade disruption.

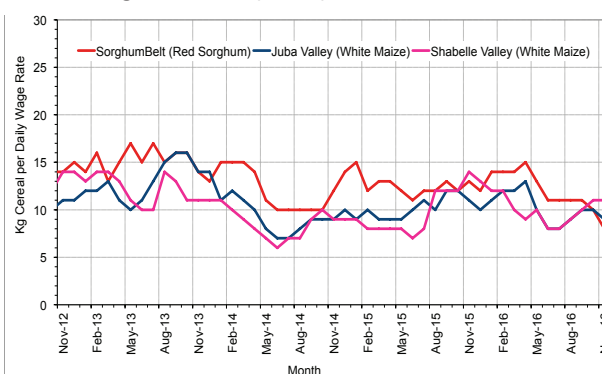
Cost of living (i.e. cost of the MEB) and purchasing power (measured through terms of trade [ToT] between labour wage and cereals) were among the major determining factors of the food security situation of urban populations, due to their high market-dependency. Insecurity and a lack of humanitarian access have also contributed to food insecurity particularly in the regions of Bakool and Hiran where population was classified under acute food security Crisis.

The MEB cost in November 2016 indicated mild to moderate increase from July 2016 in most regions of Somalia, except slight decline in Middle Juba, Lower Juba and Galgaduud regions in line with declined cereal prices (mainly sorghum). The MEB cost in November 2016 is also higher compared to 12 months ago (November 2015) in all urban markets of Somalia, with the exception of Middle Shabelle region where the MEB cost declined by 13 percent, as a result of a decrease in sorghum prices (particularly Adan-Yabal market). The decrease in sorghum prices resulted from improved commodity supplies due to a reduction in the number of road blocks and a decrease in transportation costs. Similar trends were observed in all regions of Somalia, as MEB increased in November 2016 compared to 5-year average, despite the reported slight declines in Middle Shabelle and Juba regions because of decreased sorghum and/or imported food prices in these markets.

Insecurity in recent months (October –November), has caused displacement and further exacerbated food insecurity particularly in Bakool. This was caused and hastened by withdrawal of Ethiopian Army from the area, and occupied insurgents. Similarly, the repeated conflicts emerged in Mudug (Galkacyo town), and pockets in Bari region (Qandala) have also caused loss of lives and massive displacements to surrounding rural areas and neighbouring regions.

Casual labour, which is characterised by very low and irregular wages due to seasonal variation, constitutes a critical source of income for poor households in urban

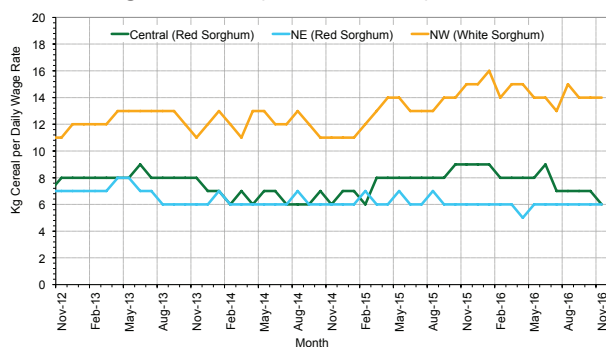
**Figure 4: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (South)**





areas. Between July and November 2016, wage rates for casual labour declined in most regions of the country, except in Shabelle regions where wage rates increased by 14 percent due to increase of non-agriculture activities particularly in Middle Shabelle region. The highest decline was recorded in Mogadishu Bakara (19%), followed by Bakool (18%). This decline in Bakara market could be attributed primarily to reduction in trading activities and construction as well as increase of labour in migration from neighbouring regions (Bay and Shabelle). In Bakool, the main reasons for the reported decline in wage rate are reduced agricultural labour opportunities in the surrounding rural areas due to poor *Deyr* 2016 rainfall and worsened security conditions over the last two months. Compared to a year ago (November 2015), labour wages showed stable trends in central and northern regions but southern regions recorded mild to moderate declines with the highest decline (22%) recorded in Banadir (Bakara). Compared to the five-year average, daily labour wage exhibited mixed trends, with increases noted in central, northern, Shabelle and Lower Juba regions while declines were recorded in the rest of the country.

**Figure 5: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (North & Central)**



The purchasing power among poor households expressed as the Terms of Trade (ToT) between casual labour wage and most commonly consumed cereals increased by 3-4 kgs of cereals per daily wage in Shabelle regions as a result of increase in labour wages from increased agriculture labour opportunities. In Sorghum Belt regions, ToT declined (2-3 kgs of cereals per daily wage) due to increased cereal prices but it remained relatively stable in other regions. Compared to a year ago (November 2015), ToT remained relatively stable or declined in most parts of the country as a result of decline in daily labour wages compared to one year ago. Similarly, compared to the five-year average, ToT declined in most of the southern regions except in Middle Shabelle where ToT increased by 4kgs per daily labour wage. ToT also increased (1-3kgs per daily labour wage) in central and northern regions. (Figures 5 and 6).

## RURAL

### Northern regions

In the most likely scenario (August - December 2016), the food security projection for most of the northern rural livelihoods has been classified as Stressed (IPC Phase 2); Minimal (IPC Phase 1) for Hawd of the northwest; and Crisis (IPC Phase 3) in the drought affected Guban Pastoral and Northern Inland Pastoral of northeast. Addun/Hawd Pastoral of northeast is classified as Stressed (IPC Phase 2).

As a result of near to below average Karan (July-September) rains followed by below average to poor *Deyr* rains, pasture and water condition showed mixed pattern in the northern regions. In most of the livelihoods of north, pasture, browse and water conditions are poor. These include the Northern Inland Pastoral which is the largest livelihood zone in Bari, Nugal, Sanag and Sool regions, large part of Coastal Deeh, most of Hawd, East Golis, Guban and large parts of Addun pastoral in the Nugal and north Mudug regions. Limited parts of Northwest Agro Pastoral, West Golis and parts of the Hawd (Hargeysa) in the north, pasture and water conditions have shortly improved due to light to moderate rains received. However, pressure from huge livestock in-migration from all drought affected areas has resulted in early depletion of pasture, browse and water. Abnormal desperate livestock migration from drought affected areas from NIP of Nugal, Sool and Sanag regions to Hawd of Sool and Togdheer regions and to Northwest Agro Pastoral were reported in October - November. On the other hand, unseasonal rains in November 2016 slightly improved rangeland conditions in drought affected Guban pastoral livelihood in Awdal which attracted livestock influx from Hawd of Hargeisa and Od-weyne districts.

Early depletion of pasture and water scarcity will likely aggravate further in the course of Jilaal (January-March). Since August 2016, extensive water trucking with rising prices has been reported in most of the Berkad dependent livelihoods in north (NIP, Hawd, Addun, East Golis and Togdheer agropastoral), as most surface water catchments (Berkads and dams) did not replenish well. The worst affected areas are entire NIP and east Golis of Bari. Body condition of livestock is largely below average to poor (PET: Score 2-1), owing to poor pasture, and water, limited migration option and drought induced diseases in most livelihoods of North. The body condition of all livestock species in NIP have gradually deteriorated over the last five months (from August to November 2016). Lactating animals are also in very poor body condition (PET Score 1). Exceptions are parts of Hawd, Northwest Agro Pastoral and West Golis of Woqoyi Galbed and Awdal where body condition is average (PET score 3). According to field reports from NIP,



there is high livestock off-take (death and distress sale). Currently, most animals are concentrated near permanent water points, where large number of livestock carcasses are observable. Livestock holding of all wealth groups has reduced in most livelihoods in the north, and there is significant loss reported in NIP livelihood and further decline is very likely in the course of Jilaal (January - March). Generally, the expected livestock reproduction is low to medium for all species, and herd growth and milk production are not expected due to succession of poor season, prolonged Hagaa and failure of *Deyr* rains. Livestock abortion owing to poor feeding and disease, culling and death of offspring, lactating and weak animal have compounded the high off take. Consequently, pastoral dropout and destitution have been reported in large parts of NIP in Bari, Nugal, Sanag and Sool regions. The ongoing drought presents a significant threat to food security of poor pastoralists particularly in Northern Inland Pastoral (NIP) and Guban Pastoral livelihood zones in northern Somalia.

According to the recent FSNAU/Ministry of Agriculture Gu-Karan crop assessment (November 2016) in the Northwest Agropastoral livelihood (Hargeisa, Gebiley, Baki, Borama districts) about 37 500 tonnes of cereals (mainly sorghum) were harvested. This estimate is less compared to the FSNAU projections made in July 2016, as a result of near to below average Karan (July-September) rains. However, the Gu-Karan 2016 production is still higher by 68 percent compared to last five years PET average (2011- 2015) and is expected to contribute to improved household food security among agropastoral households over the next 2-3 months.

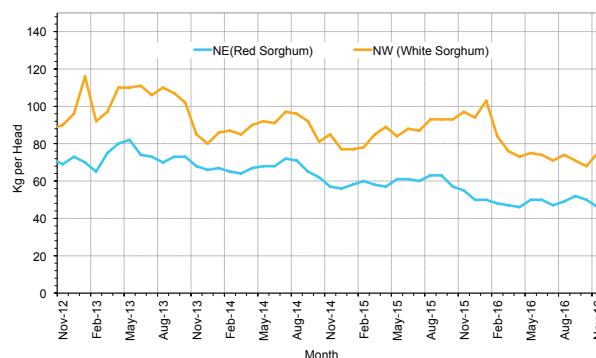
The ToT between goat and rice showed mixed trends over the last five months (July-November 2016), mostly exhibiting mild changes (increase/decrease). In the northeast, on average ToT remain stable at 67 kg/head due to the decline in rice prices. In the northwest, ToT rose slightly from 57 to 58 kg/head on average due to increase of goat prices. Yearly comparisons indicate moderate decline (15%) in the northeast and significant decline (27%) in the northwest mainly due to decline of goat prices as a result of deteriorated body condition and oversupply to markets to meet basic household requirements. Similarly, in comparison to the November five-year average, both northeast and northwest ToT experienced mild declines of eight percent each.

### Central regions

In the Post-Gu 2016 most likely scenario (*August -December 2016*), Coastal Deeh, Hawd and Addun livelihoods were classified as Stressed (IPC Phase 2). However, food security situation in Cowpea Belt Agropastoral is classified as Crisis (IPC Phase 3) as a result of poor harvest of cowpea crops (main source of food and income) due to poor and erratic *Gu 2016* rainfall.

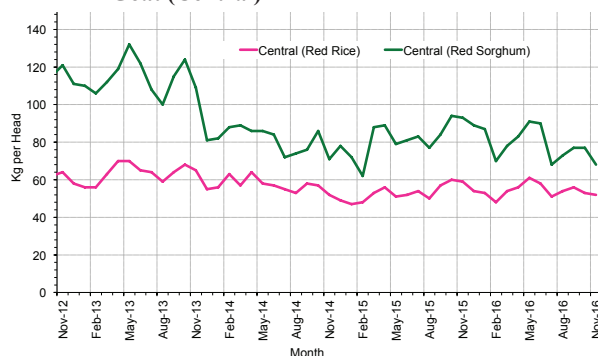
Below average to poor *Deyr* rains in October-November 2016 have deteriorated water and pasture conditions in rural livelihoods of central regions (Cowpea Belt, Coastal Deeh, Hawd and Addun). Early water trucking (November 2016) with high water prices has been reported in Barkad dependent livelihoods of Hawd and Addun. Below average precipitation with light intensity has been reported in parts of Cowpea belt and Addun (mainly Hara-dhere, Cel-dher and Hobyo districts) as well as parts of Hawd between Hiran and Galgadud. The livestock migration pattern is frequent within the central and neighboring regions including Ethiopia, putting pressure on the limited pasture and water in the pocket areas that received some rains. Livestock body condition is largely below normal to poor in most livelihoods (PET score 2-1) with further deterioration of livestock body condition expected due to

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



*Below average Body condition, NIP, Isku-shuban, Bari region, FSNAU, November 2016*

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



poor pasture, limited migration options, harsh and long dry Jilaal season. Conception rates of camel and sheep/goats were low to medium during the *Deyr* 2015 and *Gu* 2016 seasons. Medium kidding/ lambing of goats and sheep and low camel calving are reported. Milk availability and access at household level are low in most of the central livelihoods. In November 2016, the price of camel milk marginally increased by seven percent compared to July 2016, by 10 percent compared to last year and by 19 percent compared to the five year-average due to low camel birth, deteriorated body condition of milking animal as result of poor pasture and water. Due to poor and erratic *Deyr* rains in Cowpea Belt livelihood, cowpea crop is not performing well and expected production is likely to be poor in most of the cowpea producing districts. Sorghum has also performed poorly during the *Deyr* growing season, although this crop is marginal for the Cowpea Belt livelihood



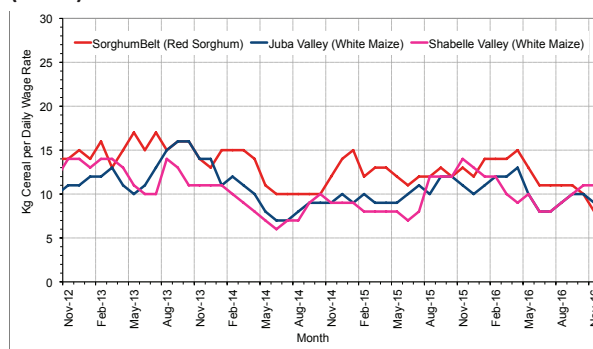
Poor pasture, Addun, Hobyo, South Mudug, FSNAU, November 2016

The ToT between local quality goat and cereals (rice) showed mild increase over the last five months (July-November 2016) in most markets of the central regions. The increase was mostly driven by local quality goat price increase due to reduced availability of sellable animals. On an annual basis, ToT declined by 12 percent on average in central regions. Similarly, comparison with the five years average depicts mild decline of five percent from (55 to 52 kg/ head) on average.

### Southern region

In the post-*Gu* 2016 analysis (August-December 2016), the food security situation in most rural livelihoods of southern regions were projected as stressed (IPC Phase 2), with the exception of Southern Agro-pastoral of Hiran region and Southern Agro-pastoral Rain-fed Maize livelihood zone of Lower Shabelle, Middle Juba and Lower Juba regions, which were classified as Crisis (IPC Phase 3). Riverine Pump Irrigation livelihoods in Gedo and Middle Juba, Southern Inland Pastoral of Juba regions have deteriorated from Minimal (IPC Phase 1) to Stressed (IPC Phase 2) due to the poor performance of the *Deyr* rains which aggravated the negative impacts of the below average to poor 2016 *Gu* (April-June) rains.

Figure 8: Regional Trend in Terms of Trade: Labour to Cereals (South)



The *Gu* cereal stocks of poor households are already exhausted in most regions of southern Somalia. However, cereal supply is normal most of the markets due to supplies from recent off-season harvests and release of carry-over stocks by wealthier farmers. Light to moderate *Deyr* 2016 rains and agriculture input support (seeds, tractor hours and canal/catchment rehabilitations) have created job opportunities in the farming parts of southern regions. As a result, daily labor wage rates have increased in Shabelle valley and Hiran region while remaining stable in Bay in November 2016 compared to July. However, wage rate have declined in rain deficit areas of Gedo, Bakool, Lower Juba and Middle Juba due to reduced agricultural activities.

The *Deyr* 2016 crop production prospects in all southern regions of Somalia is unfavorable, and is expected to be one of the lowest harvest since 1995. Given the poor harvest prospects, the food security situation of poor households is likely to deteriorate in the lead up to and after the *Deyr* harvest and the number of food insecure agropastoral households is expected to rise.

The food security situation of poor households in the major cereal producing regions of Lower Shabelle and Bay is not better (one month stocks) due to the expected below average *Deyr* harvest and availability of limited agricultural labor. Nevertheless, majority of the wealthier groups (Middle & Better-Off) of the two regions, will have enough cereal stocks at household levels up to the next *Gu* 2017 harvest. The exception is rain-fed agro pastoral livelihood of Lower Shabelle, which is expected to experience increased food insecurity because of consecutive seasons of reduced harvests, compounded by access constraints due to insecurity and declining purchasing power.

Field reports from Gedo, Bakool and Juba regions have indicated livestock death (cattle and Goat/Sheep), as a result of prolonged and harsh Hagaa and delayed and/poor *Deyr* rain in October. Although recent rains are improving pasture

and water availability, livestock body conditions and animal health status remain poor in these regions, with a severe negative impact on pastoralists' income and nutrition. Recent rains have lessened livestock concentration in some parts of Bay, Lower Shabelle, Gedo and Middle Shabelle regions. Livestock body conditions (PET score 2-3) have also improved in most pastoral areas, recovering from the earlier drought conditions. However, water and pasture conditions are expected to deteriorate at faster than normal rates. Similarly, livestock kidding/calving rates were low to medium, while milk availability is near average to poor in most livelihoods. Livestock holding, particularly small ruminants and cattle are likely to deteriorate in the coming months in all pastoral and agro pastoral livelihoods of Hiran, Bakool, Gedo, Lower Juba, Middle Juba, Middle Shabelle and coastal areas of Lower Shabelle, although herd size trend will most likely remain near baseline or at baseline levels in other areas (most of the Lower Shabelle and Bay regions).



*Land preparation, Riverine Jowhar, M.Shabelle, FSNAU  
November 2016*

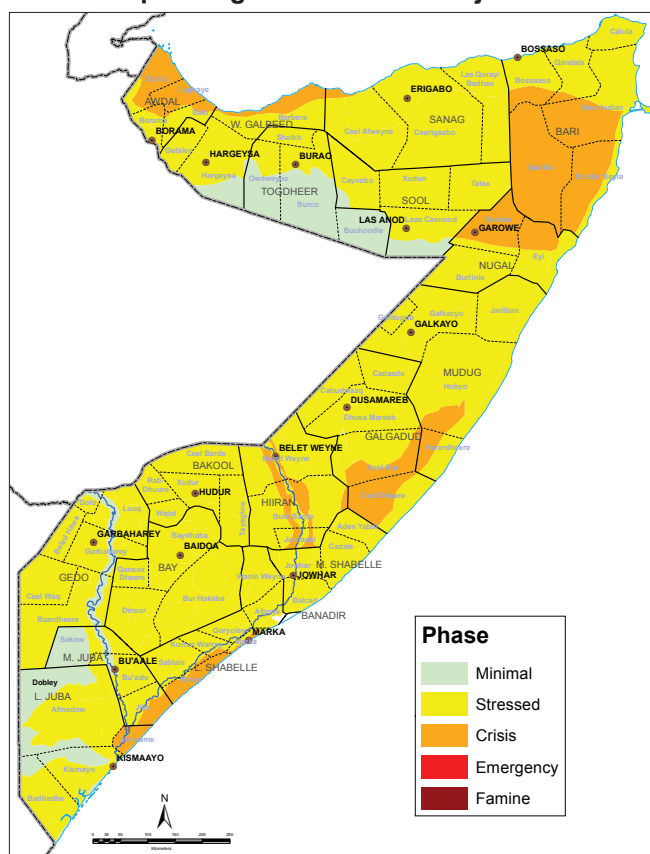
Due to below average to poor *Deyr* rains, seasonal agricultural activities have only created limited job opportunities for poor households in riverine and agro-pastoral areas of southern Somalia. As a result, the purchasing power of poor households measured through the terms of trade (ToT) between daily labour wage and cereals (sorghum) has decreased in November compared to July 2016 in Sorghum Belt regions (27%) reflecting high prices of sorghum. However, the ToT between daily labor wage rate and maize prices has increased in Shabelle valley (38%) and Juba valley (13%) regions. Annual comparison of ToT shows a decreases in most regions, with a moderate decline noted in Shabelle (21%) and Juba (18%), while significant decrease has been observed dropped in the Sorghum Belt (38%) owing to increased sorghum price in anticipation of poor harvest in the *Deyr* 2016 season. In areas where reduced *Deyr* 2016 cereal harvests are expected, rising prices of staple foods will further affect food access during the prolonged lean season during the first half of 2017.

Similarly, the ToT between local quality goat and cereal price showed declining trend in the Sorghum Belt and Juba regions between July and November 2016. It has decreased in Hiran (33%), Gedo (23%), Bakool (30%), and Bay (23%) and Middle Juba (6%) as a result of declining livestock prices and rising cereal prices in anticipation of below-average to poor harvests in this season. These unfavorable TOT could be the result of the deterioration of animals' physical conditions brought on by poor grazing due to drought conditions experienced this year. However, the ToT was stable in Lower Juba (3%) and Shabelle (2%) as a result of lower maize prices in these regions. In November 2016, the lowest ToT was reported in Gedo (53kg/ goat) regions, while the highest ToTs were recorded in Middle Shabelle (202kg/goat) and Lower Shabelle (156kg/goat). Annual comparisons also show deteriorated ToTs between local goat and local cereals in Bay (24%), Hiran (26%), and Bakool (52%), Gedo (37%) and Juba (45%) while it increased in Shabelle (20%) region due to improved livestock conditions and decreased cereal prices.

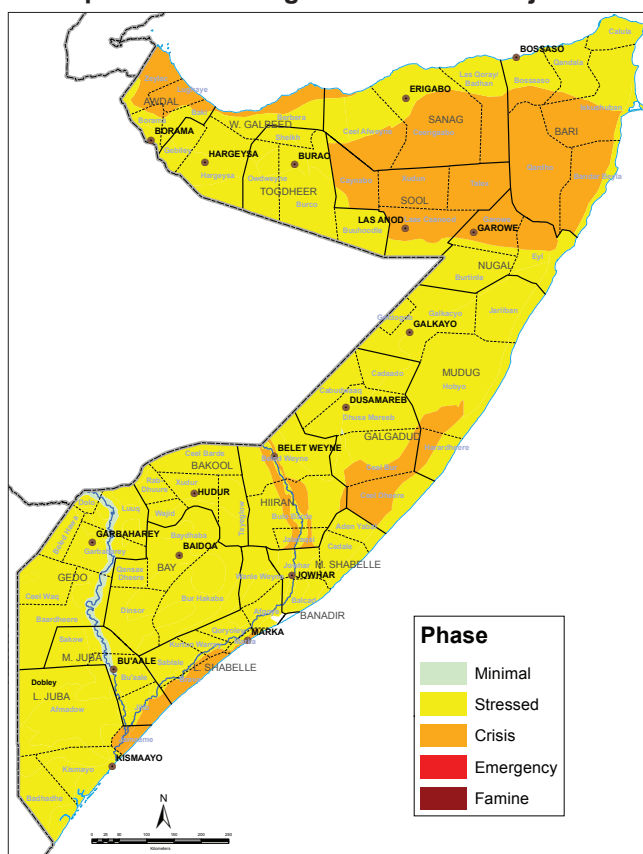


## SOMALIA ACUTE FOOD INSECURITY SITUATION OVERVIEW

Map 4: August-December Projection



Map 5: Revised August-December Projection



### Recent publications and releases

- FSNAU Nutrition Update December, 2016
- FSNAU Climate Update, November 2016
- FSNAU Market Update, November 2016
- FSNAU 2016 Post - Gu Nutrition Technical Report, November 2016
- FSNAU Post - Gu Food Security and Nutrition Analysis Technical Report, October 2016
- Joint FEWS NET/FSNAU, Somalia Food Security Outlook, November 2016
- FSNAU Post - Gu Nutrition Technical Report, December 2016

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