

KEY ISSUES

Although the findings of the post *Gu* assessment will not be released before August 2011, it is evident that **the total number of people in need of humanitarian assistance will increase in the second half of the year.** The main driving factors of the worsening food security situation include unfavorable prospects for the *Gu* season harvest; reduced assets (livestock, cereal stocks) during the recent prolonged dry weather conditions; sustained soaring cereal prices due to anticipated shortage of local cereal supply; increased cost of living and eroded purchasing power; limited social support due to overstretching; continued conflict and civil insecurity resulting in population displacements and restricted humanitarian access.

Sky-rocketing staple cereal prices (maize, sorghum) following the failure of the last *Deyr* rainy season and rapid depletion of cereal stocks raised the cost of living in Somali Shilling zones (South, Central and North) by 35 percent from a year ago. The soaring prices of imported food and fuel on domestic markets, in line with the global price trends, also had a compounding effect on the rising cost of living. Food prices are likely to stay high in the face of below normal *Gu* crop outlook, and therefore food access for market dependent households, including urban and rural poor, and internally displaced population (IDP) will remain difficult through December this year. The start of *Gu* rains helped to alleviate water and pasture stress - the overwhelming impact of the dry weather conditions for almost nine months in most parts of the country. Nevertheless, the lingering effects of the drought are expected to be felt for several seasons, particularly in pastoral areas, where high livestock off take was reported during the dry season. However, currently the crisis is more severe in agricultural livelihoods of southern Somalia, which are experiencing a second consecutive season of crop failure.

The nutrition situation remains of great concern, especially **in southern regions, where recent rapid assessments confirm a sustained crisis, with rates of malnutrition expected to be above 20 percent in the rural areas.** This is further confirmed with very high levels of malnutrition being reported in the refugee camps, where the United Nations High Commissioner for Refugees (UNCHR) reported 33 percent of global acute malnutrition in Dolo Ado camp in Ethiopia from a survey conducted in April. The survey also reports elevated mortality again illustrating the crisis left behind in southern Somalia.

Key Issues and Early Warning for July to December 2011

- Gu rains bring some improvements to pastoral livelihoods although the crisis will sustain in areas with significant asset losses during the drought*

The *Gu* rains to some extent mitigated the impact of the drought on pastoral communities as water stress eased and rangeland resources started to improve. As a consequence, water prices that reached the record highs during *Jilaal* season started to decline as water trucking subsided in the country, while livestock migration pattern returned back to normal. Therefore, pastoralists' expenses on water and migration costs have considerably declined, although poor pastoralists' budgets are still under pressure from food price inflation, while their asset holdings have declined due to high offtake during the harsh *Jilaal* season. In addition, livestock production and reproduction are expected to be low as a result of weak body condition and miscarriages among the livestock over the months of drought.

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

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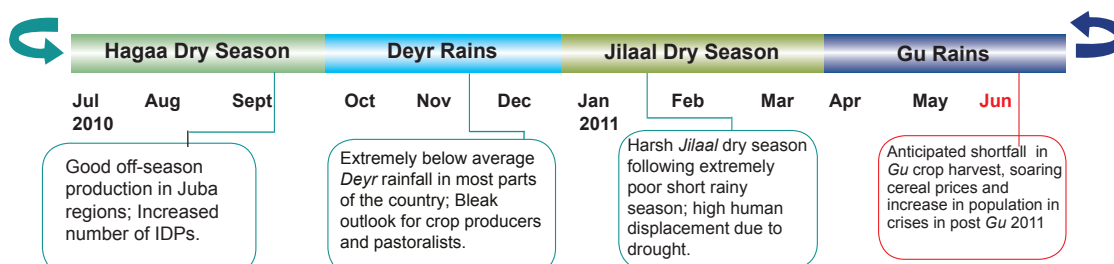
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Therefore, the poor pastoralists are going to benefit little from the anticipated livestock price increases during the coming *Hajj* and *Ramadan* periods due to limited number of livestock assets to be sold for export. The most affected are the pastoral livelihoods that had experienced high livestock offtake during *Jilaal* season in some areas even resulting in increased pastoral destitution. These include Coastal *Deeh* of North and Central, Sool Plateau of Sanag and parts of Nugal Valley, Southern Inland Pastoral of Bakool and Hiran as well as cattle pastoral livelihoods in the South. Hawd Pastoral of Central and Hiran regions as well as coastal parts of Shabelle and Juba are also among the most affected pastoral areas due to significantly below normal *Gu* rains, which will only deepen the crisis in these livelihoods.

- ***Looming shortfall in Gu crop harvest to deepen the crisis in the South***

The 2011 long rainy season harvest in southern Somalia is likely to be about half of its normal levels, primarily due to below average *Gu* rains in Somalia and highlands of Ethiopia, which resulted in low river levels, delayed agricultural activities and poor crop performance. Low maize and sorghum outputs are expected across most of the riverine and agropastoral areas in the South, including the major cereal producing regions of Lower Shabelle and Bay, which in a normal *Gu* season account for 71 percent of the total cereal production of southern Somalia. The crop outlook may improve for Juba and Shabelle regions if the expected *Hagaya* (June-August) rainfall performance is average to good, which will provide off-season harvest opportunities to these regions. However, there are no mitigating circumstances envisaged for Bakool, most of Gedo and Hiran regions where the *Gu* cereal production is projected to be very poor. Thus, the crisis is going to deepen in southern Somalia, particularly in crop producing livelihoods, due to second season of low harvest and absence of stocks, hence limited income and food sources for crop-producing households, low agricultural employment opportunities, overstretched social support compounded by restricted humanitarian interventions and escalating conflict in the region.

- ***The cost of living is likely to stay high affecting food access of market-dependent populations***

Anticipated low local cereal supply in the country on the backdrop of absent carry-over cereal stocks increase the likelihood of sustained soaring prices of the major staple cereals in the country. Since the beginning of the year the staple cereal prices (maize and sorghum) rose by 52-95 percent in most Somali Shilling markets, while they have doubled and even tripled from a year ago in some areas. High diesel price trends on domestic markets of Somalia, which move in line with the international oil prices, also contributed to soaring inflation and will continue to impact the rates of food prices. Thus, the cost of living will remain high, thereby plunging purchasing power and limiting access to food of market-dependent population, particularly urban and IDPs, as well as rural poor. The situation is particularly acute in the South-Central due to volatile security situation, restricted trade and economic activities and limited access by the humanitarian community. Thus significant numbers of population in these zones and some in northern parts of the country, who are unable to cover their basic needs due to escalating costs, will be in crises up to the end of the year.

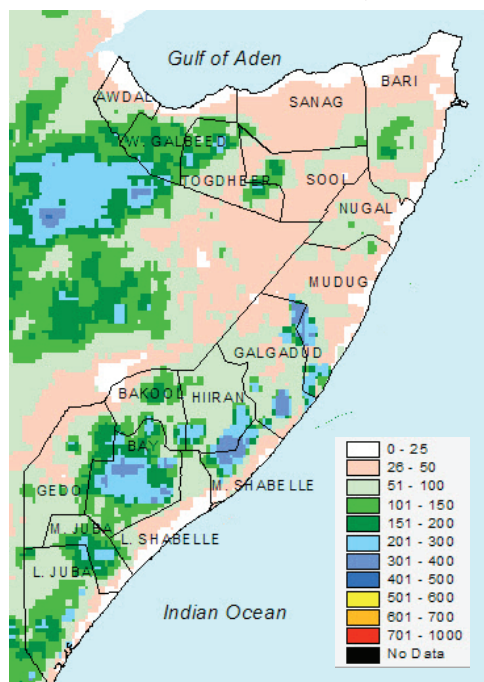
- ***Concerning nutrition situation in South and Central***

The nutrition situation remains of great concern in many parts of the country, but most notably in South and Central regions, where levels are anticipated to be above 20 percent in most rural areas. Nutrition surveys are ongoing across central and southern Somalia, with results expect in mid July 2011. FSNAU with ACF conducted a nutrition survey in Mogadishu in April and reported a global acute malnutrition rate of 15.2 percent and severe acute malnutrition rate of 1.7 percent. Given the lower cereal prices in the city this may be a mitigating factor to some extent however the results remain unacceptably high. Additional surveys were conducted in the IDP settlements in the Northwest regions, indicating a stable situation in Hargeisa but a seasonal deterioration in Burao and Berbera.

SECTOR HIGHLIGHTS

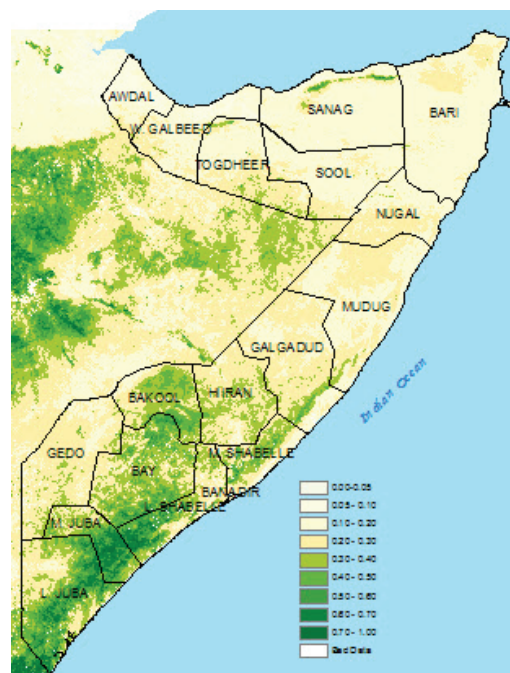
CLIMATE

Map 1: Cumulative Rainfall Estimates (March to May 2010)



Source: National Oceanic and Atmospheric Administration (NOAA)

Map 2: NDVI 1st Dekad for June 2011



Source: National Oceanic and Atmospheric Administration (NOAA)

The *Gu* 2011 rainy season had a late onset in most parts of the country. Overall rainfall performance was below average in the South, and moderate to good in most livelihoods of Central and North. Erratic, low intensity rains commenced in mid April in some parts of the Northwest and pockets of Bari, Sanaag and Bay regions. Most of the other regions of Somalia were remaining dry until the third dekad of April when moderate rains started to fall in most parts of the South, and some parts of Northwest. In the first two dekads of May, intensity and coverage of rains improved and encompassed almost all livelihoods of Somalia. However, no rains precipitated in the country throughout the third dekad of May and first dekad of June except for Bari, W. Galbeed, Togdheer and Awdal regions.

In the North, the overall *Gu* rainfall performance was average to good apart from Guban Pastoral and Gebi Valley as well as pockets of Nugal Valley (Garowe, Eyl and Ceel Afweyne districts) and Sool Plateau (Erigavo district), where the precipitation was localized and below normal. In Central, rainfall performance was moderate but ended early. The areas with poor rainfall include Hawd of Galgadud, Hiran and Part of Mudug (Galkayo). In the South, most of the regions received moderate rains during the first two dekads of May, but experienced long dry spell in the subsequent period. In Bay, Middle Shabelle and part of Middle Juba (Buale and Jilib), the rainfall performance was relatively normal in terms of temporal distribution, as well as intensity and coverage. The critical areas include coastal strip of Lower Shabelle and Juba regions as well as the adjacent livelihoods, which remained dry throughout the season (Figure 1). However, *Hagaya* rains are still expected in these livelihoods in June-early August.

Vegetation condition in most parts of Somalia showed progressive improvement over the month of May following the start of wet season. This is confirmed by Normalized Difference Vegetation Index (NDVI) (SPOT - 1km resolution), which shows generally improved vegetation vigor over the country from April to 1st dekad of June. However, the vegetation is poor (close to minimum NDVI values) in most of Gedo, parts of Juba regions (Afmadow, Sakow, Shabelle, coastal areas), Hiran and Galgadud (Hawd) regions.

According to the most recent regional 28th climate outlook forum of the Greater Horn of Africa (Nairobi, 16-17 June 2011) for the July to September 2011 period, there is enhanced probability for near normal to above normal rainfall in the Northwest (some parts of Awdal region), while the rest of the country will remain dry during this period.

CIVIL INSECURITY

Sporadic and recurrent conflicts between the government, its allies and the rival armed groups persisted in parts of South-Central throughout the current year. Continued active conflict between the warring parties (Transitional Federal Government and opposing groups) has been witnessed in Mogadishu, Lower Juba (Dobley), Gedo, Hiran (Beletwein) and Galgaduud regions. In contrast, the security situation in the North remained generally stable. Clan tensions were reported in some parts of Nugal region and Kalashale areas of Buhoodle district, although the security situation remained relatively calm.

The outcomes of the volatile security situation in South-Central are reflected in human casualties, population displacement, asset destruction, disruption of trade and economic activities, restricted pastoral movement and limited humanitarian access. Bakara market, the main supply market for south-central Somalia as well as the Northeastern province of Kenya and Somali region of Ethiopia, remains dysfunctional due to insecurity, contributing to higher commodity prices, particularly in southern Somalia. Further, conflicts remain the primary reason for population displacement within and outside the country. According to the UNHCR Population Movement Tracking System for Somalia, in the current year more than 200,000 people have been displaced by conflict within the country while another 70,000 have fled to neighbouring countries. Most of the displaced people originated from South and Central. In May 2011 alone, 14,900 people were displaced by conflict within Somalia, with more than half of them originating from Mogadishu. However, the current year was also marked by a substantial drought-induced displacement, when thousands were displaced both within and outside the country.

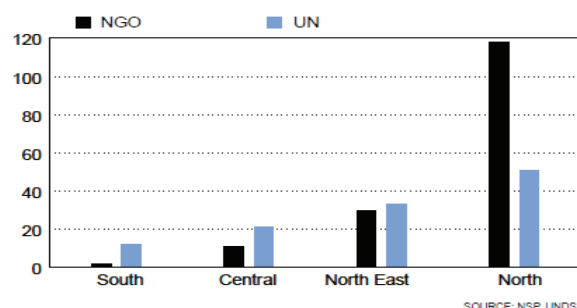
Humanitarian operations remain restricted in most parts of the South (Mogadishu; Bele Xaawo, Luuq, Ceel Waaq in Gedo region; and Dhobley in Lower Juba region), which is demonstrated by very low representation of the UN and NGO international humanitarian staff (Figure 1). However, the Office for the Coordination of Humanitarian Affairs (OCHA) Somalia Humanitarian Access report (May '11), indicates an improved access of humanitarian community in many parts of central Somalia (Abudwaq, Xeraale, Balambal, Dhusamareb, Guriel in Galgaduud and Mataban in Hiran) since the beginning of 2011, which translates into increased opportunities for extending required humanitarian support to people in crisis.

By all accounts, it can be concluded that the intensification of sporadic conflicts will further affect the commodity movements across and within the country, impacting the prices of these commodities, restricting population movement as well as livestock migration and limiting employment opportunities.

AGRICULTURE

Following the late onset and below normal *Gu* 2011 rains, planting activities in southern Somalia started with some delay - in the second *dekad* of April. However, a long-dry spell (15-20 days) from the last week of April caused wilting and/or drying up of seedlings and impacted intensity of agricultural activities (continuation of planting, weeding and irrigation) in most agricultural areas of the country. However, rains of the second *dekad* of May 2011 improved the crop condition with agricultural activities resumed in most areas. Irrigation capacity was below normal in riverine areas due to low river levels both for Shabelle and Juba rivers as a result of inadequate precipitation in Somalia and river catchments of Ethiopian highlands. Furthermore, tillage capacity and utilization of farm inputs was low during the *Gu* 2011 cropping season, primarily due to increased fuel prices and limited availability of seeds, following the *Deyr* 2010 crop harvest failure. Consequently, the below average crop establishment is reported for both the rain-fed and irrigated crops.

Figure 1: International Humanitarian Staff Presence in Somalia



Poor crop establishment in agropastoral areas. Jalalaqsi, Hiran. FSNAU, May 2011

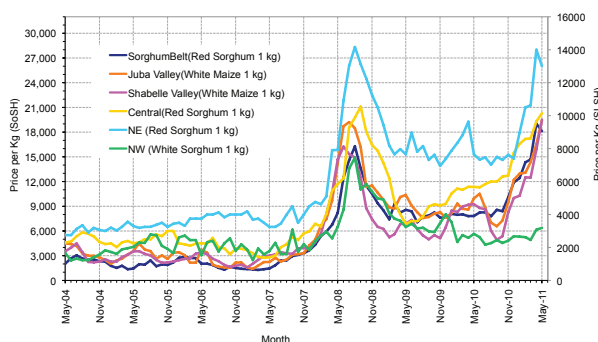
The areas with poor crop performance (seedling, vegetative growth, flowering and fertilization) include Hiran, Lower Juba, Lower Shabelle, Bakool, Gedo regions and parts of Middle Juba (Sakow/Salagle). On the other hand, crop performance is below normal in Bay, Cowpea Belt, Middle Shabelle, parts of Middle Juba (Buale and Jilib), Togdheer and W. Galbeed. Near normal crop establishment is reported in Northwest Agropastoral of Awdal region. The crop outlook may improve in most parts of Juba (Buale, Jilib, Jammame, Kismayo) and Shabelle, if the expected *Hagaya* rains (June-early August) are average or good. Similarly, *Karan* rains (late July-September) will benefit both long-cycle (sorghum) as well as short-cycle (yellow maize) crops in the Northwest Agropastoral (Awdal, Togdheer and W. Galbeed). However, in as much as FSNAU and partner field crop production comprehensive assessment in Somalia is scheduled to run from 4 to 23 July 2011, early indications point towards a below average *Gu* crop production outlook for sorghum and maize in the South, in comparison to the last *Gu* season as well as the average trends of the last 15 years.



Normal sorghum crop condition. Goorasane Village, Baidoa, Bay. FSNAU, May 2011.

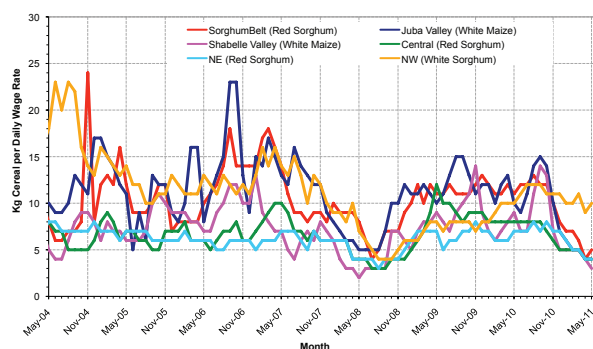
The main staple cereal (maize, sorghum) prices continue to maintain an upward trend in the current year as a result of low local cereal availability following the *Deyr* 2010/11 crop harvest failure in most regions of Somalia, except in Northwest (Figure 2). Conflict-induced disruptions in trade and economic activities in South-Central, both within the region and across the border, is another contributing factor to the recent rise in cereal prices. For instance, average prices of main staple cereals (maize and sorghum) increased by 50-90 percent in January-May 2011 across Somalia apart from Northwest. The aggregate average prices of these cereals are also considerably higher compared to the same month last year. Namely, the maize prices are 111 percent and 80 percent higher than a year ago in the producing regions of Shabelle and Juba respectively. In the same period, aggregate red sorghum prices surged on the markets of the Sorghum Belt (132%), most of Central (79%) and Northeast (70%). In the Northwest, however, the white sorghum price increased by only 13 percent from a year ago, owing to good harvest in the last *Gu-Karan* season.

Figure 2: Regional Trends in Cereal Prices (SoSh/SiSh)



Opportunities for agricultural labour in the current *Gu* season improved over the last month (May '11) due to intensified agricultural activities (continuation of planting, weeding and irrigation). However, the labour wage rates are still lower than the same time last year in southern regions of Shabelle (20%), Juba (22%) and Sorghum Belt (8%) due to below average agricultural activities and high supply of labour. In these regions, the terms of trade (ToT) between cereal and labour wage are the lowest level in the last three years mostly due to sky-rocketing cereal prices. In 2011, the ToT in southern Somalia fell by 38-45 percent, with Shabelle regions exhibiting the highest decline. Compared to a year ago (May '10), the ToT has dropped significantly in Sorghum Belt (55%), Juba (60%) and Shabelle (67%) as a result of soaring cereal prices and falling labour wage rates (Figure 3). In southern Somalia, the average amount of cereals that currently (May '11) can be exchanged for one day of labour is equivalent to 3-5 kg versus 9-11 kg the same time last year. However, the ToT local cereal/ labour wage have been stable in Northwest zone, where currently it is estimated at 10 kg/labour wage. Further deterioration of ToT in the South is expected due to the looming steep cereal prices pending the next *Gu* harvest, low labour wage rates and insecurity in the region.

Figure 3: Regional Trends in Terms of Trade Cereal to Labour



LIVESTOCK

Pasture, Water and Livestock Conditions

The current *Gu* rains eased water stress, particularly in Sool Plateau, Hawd, Addun, Nugaal and Coastal *Deeh* of Bari region, that had suffered water shortages as a result of failed *Deyr* rains and the prolonged harsh *Jilaal* dry season. Water trucking has ceased with the onset of the *Gu* rains in most key pastoral and agropastoral areas of the country as rainfall replenished communal dams, natural ponds, private water catchments and *berkads*. An increase in the water levels was also witnessed in the permanent water sources such as shallow wells, boreholes and streams in northern, parts of central and southern regions. Increased overall water availability led to a significant decline in water prices in most pastoral areas of the country. Furthermore, rangeland resources have regenerated in most regions in the North, Coastal *Deeh* and Cowpea Belt of Central, Bay, northern part of Gedo, Middle Shabelle, parts of Juba and Southeast Pastoral livelihood of Lower Juba. In contrast, however, the main pastoral areas of the coastal strip in the South remain in poor condition due to lack of precipitation. Similarly, pasture and water resources are limited in pockets of East Golis/Gabi, southern part of Gedo, parts of Guban area of Sanaag due to unevenly distributed *Gu* rains.

Normal to near normal livestock migration has resumed in most parts of the country in this *Gu* season with out-migrated livestock returning back to their original homelands. Reportedly, there is a large livestock in-migration from Northeastern province of Kenya and rain deficit areas of southern Gedo to neighboring Southeast Pastoral of Juba and Bay Agropastoral livelihoods with relatively good *Gu* rains, which may lead to early depletion of pasture and water in these regions. Furthermore, in case of poor *Hagaya* rains (Juba, Shabelle and parts of Bay), livestock will likely migrate from inland to riverine areas, thereby will be at a high risk of contracting livestock wet-borne diseases.

Livestock deaths was reported during *Jilaal* dry season in key pastoral areas of Central and North, as well as most pastoral and agropastoral areas of the South. However, during the rainy season, body condition of the livestock that had survived the prolonged harsh dry season started to improve, particularly for small ruminants (sheep and goats), while cattle and camel still remain below average in many areas. In Awdal region and lower Nugaal valley (Sool region) in the Northwest, livestock body condition, reproduction and production is average for all species. In contrast, in the other parts of Somalia livestock production and reproduction (births), especially among small ruminants and cattle, is not expected until October 2011 and February 2012, respectively, due to low conception rates as a result of weak body condition. Furthermore, high rate of camel abortions was reported in the key pastoral livelihoods of the country during *Jilaal* season. Therefore, camel calving was very low in May although some calving is still expected in June-July, which will result in some improvement in milk availability.



Improved rangeland and water conditions. Karkaar Dharoor, Bari region. FSNAU, May 2011

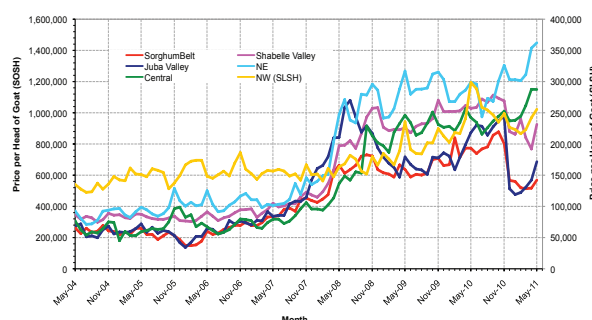


Improving shoats body condition. Galbarwaqo, Hobyo, Mudug region. FSNAU, May 2011



Weak camels. Galkacyo, Mudug region. FSNAU, May 2011

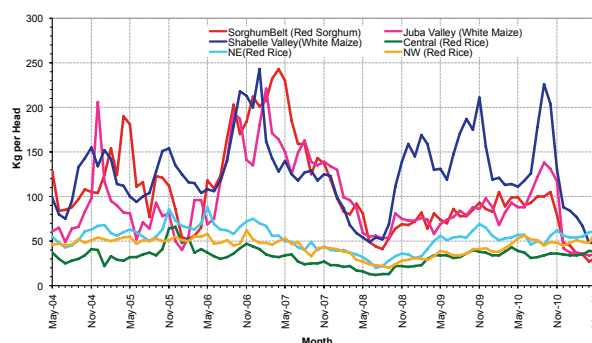
Figure 4: Regional Trends in Local Quality Goat Prices



Livestock Trade, Prices and Terms of Trade

Livestock prices showed an upward trend from May 2011 compared to December 2010 in most markets of the country (Figure 4). In the regions of Northwest, Northeast and Central, the respective local quality goat prices increased by 27, 19 and 21 percent owing to enhanced livestock body conditions in this *Gu* season, hence improved marketability. In southern regions, local goat prices remained relatively stable in Shabelle and Sorghum Belt regions although they increased significantly (34%) in Juba regions due to low supply. Cattle prices, that had dropped dramatically as a result of limited access to Garissa market over the period of drought, started to pick up rapidly in May (31% monthly increase in Juba). However, the cattle prices are still lower than last year (by 21%) mainly due to oversupply on Garissa market as a result of destocking in Northeastern province of Kenya and restocking of small ruminants through cattle selling. However, the cattle price is likely to pick up if the performance of *Hagaya* rains is average to good. In the last five months, the average ToT between local quality goat and rice increased in Central (9%), Northeast (9%) and Togdheer (52%) due to rising prices of local goat and relative price stability for rice (Figure 5). However, the ToT between local quality goat and cereals (white maize/ red sorghum) declined in Shabelle (45%), Juba (17%) and Sorghum Belt (35%) due to a significant surge in cereal prices in these regions.

Figure 5: Trends in Terms of Trade, Cereal to Goat



According to official port statistics, livestock exports from Bossaso port (51,745 heads) in May 2011 were 13 percent lower compared to the same month last year. The cumulative livestock exports during the January-May 2011 period from the same port are also 19 percent lower than in the corresponding period in 2010. The decline in exports is mostly seen for sheep and goat as well as cattle, which is attributable to low supply over the period of drought within the country. However, in the same period the increased exports of camel were observed, currently accounting for 7 percent of total livestock exports from this port (Jan-May 2011) versus 2 percent the same time last year. This is an additional indicator of stress selling in pastoral areas affected by the drought. On the other hand, total livestock exports from Berbera port (540,747) in January-May 2011 is 14 percent above the same period last year. This is mainly attributed to a wider catchment area for the port, including livestock exports from Ethiopia as opposed to Bossaso, which attracts exports mainly from Somalia. Since the beginning of the year, no chilled meat exports were reported from Mogadishu, Beletweyn, Galkaayo and Burao abattoirs.

MARKETS AND TRADE

Exchange Rate trends

Since January 2011, the Somali Shilling (SoSh) depreciated slightly (1-5%) against the US dollar in most main markets of Somalia. In the same period, the value of the Somaliland Shilling (SISh) declined moderately (4-9%) in the markets of Northwest. On an annual basis, SoSh depreciated by 3-6 percent in the main markets of Bakool, Shabelle, Hiran and Banadir; remained stable in Bay, Gedo and central regions; and appreciated slightly (2%) in the Northeast. However, SISh value rose considerably (7-10%) since a year ago (May '10) in the key markets of SISh areas owing to political stability and increased foreign exchange earnings from higher livestock exports through the Berbera port.

Import Commodity Price Trends

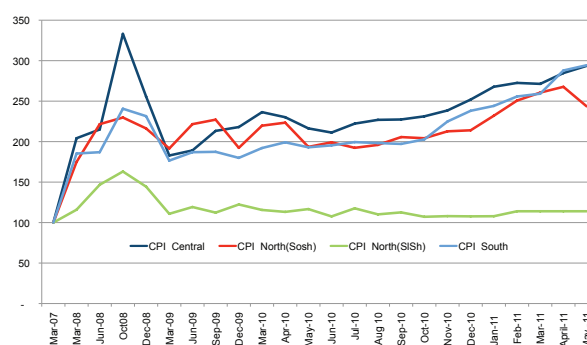
Prices of most essential imported commodities (diesel, red rice, sugar, vegetable oil and wheat flour) have exhibited increases in 2011. However, the rates of increase in January-May 2011 vary by areas and commodities. The highest price increases are observed in Banadir, Shabelle and the Sorghum Belt regions, particularly for diesel (22-43%). The second highest increase is for vegetable oil (33%) in Sorghum Belt. On the other hand, low to moderate price rises are seen for rice (7-15%) and sugar (5-14%) across SoSh markets in the same period, contrary to international price trends that have actually declined since December 2010. Conversely, price increases for wheat flour (13-28%) follow the world market pattern determined by supply shortfalls resulting from unfavorable weather in a number of countries (EU, US, etc.). The recent price hikes on imported commodities can be attributed to a combination of external as well as local factors such as various local taxes; high transport cost resulting from increased fuel prices and muddy roads during the current rainy season; escalating conflict in Mogadishu, affecting flow of commodities from main assembly markets (Bakara, Hamerweyne) to central and southern regions; and slight depreciation of the shilling. Compared to a year ago (May '10), average prices of imported commodities are significantly higher across the SoSh markets (31% increase for food and 18% for diesel), following the international market price trends. Since January 2011, imported commodity prices in the SISh markets showed the mixed trends, with moderate increases for wheat flour (14%), diesel (8%) and vegetable oil (2%); decline for red rice (9%); and stability for sugar. Although availability of imported

staple and non-staple items is normal at this time of the year in the country, the prices are expected to experience an upward trend during the monsoon season (Jun-Sep '11) and *Ramadan* period (Aug '11). Furthermore, higher livestock exports anticipated during the Islamic festive seasons (*Ramadan* and *Haji*) are to provide substantial foreign exchange and mitigate import deficits.

Urban Poor Cost of Living

The Consumer Price Index (CPI), which is based on Minimum Basket for Somalia, kept climbing up in all SoSh regions of the country during the month of May 2011. Rising prices of red sorghum - major commodity in the basket, as well as imported commodities such as vegetable oil, wheat flour and sugar are the main drivers of increased cost of living. Over the first quarter of 2011, the inflation rose sharply (14-24%) in the South, Central and Northeast regions and only marginally in Northwest (6%). The acceleration in the CPI in SoSh regions is mainly attributable to record high red sorghum prices, surpassing the peak price levels during 2008 food crises. The annual increases in the CPI in SoSh areas are even more significant (Central-36%, Northeast-26% and South-53% since May '10). Conversely, the CPI is relatively stable in the Northwest SISH areas, mostly due to relative stability of cereal prices as a result of good cereal supply from the *Gu-Karan* 2010 season (Figure 6).

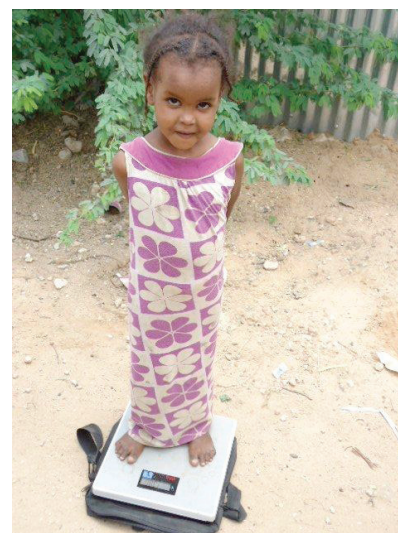
Figure 6: Zonal Consumer Price Index Trends



NUTRITION

Mogadishu:

Findings from a nutrition survey conducted in Mogadishu in April 2011 by FSNAU and ACF, in which 902 children aged 6-59 months were assessed, indicate a **Critical** nutrition situation, with a global acute malnutrition (GAM), (WHZ scores <-2 or oedema) of **15.2% (10.9-20.7)** and a severe acute malnutrition (SAM) (WHZ score <-3 or oedema) rate of **1.7% (0.9-3.1)**. The 90 days retrospective crude and under five death rates reported are **1.81 (1.38-2.37)**, and **2.2 (1.41-3.48)**, indicating elevated deaths with a doubling of the alert levels. The main causes of death reported through respondent's recall were through accidents/physical injuries, and diarrhoea. The nutrition information from health facility reports in the same areas also shows a high and stable proportion of acutely malnourished children (>20%). According to the April 2011 FSNAU Market Data Update, local cereal prices increased significantly (26-35%) when compared to the previous month. However, imported food commodity prices remained stable in April. As poor households are mainly dependent on locally produced foods, the high price increases their limited access, and is a risk factor to the **Critical** nutrition situation. More information on this survey is available in the FSNAU Nutrition Update from March and April available on the website on www.fsnau.org



Child's weight being measured in Hargeisa IDP settlements. FSNAU May 2011

IDP Surveys in northern regions

In May-June 2011, FSNAU and partners conducted nutrition surveys in IDP settlements in Somaliland and Puntland. Analysis is ongoing. Preliminary analysis of the findings in some of the IDP camps however indicate a varied situation from the *Deyr* 2011 (October-December):

- Hargeisa IDPs: A sustained Serious nutrition situation with a Global Acute malnutrition (GAM) rate of 10.9% (8.1-14.5) and Severe Acute malnutrition (SAM) rate of 2.2%(1.0-5.0) recorded. The retrospective Crude and under five death rates of 0.37(0.19-0.73) and 0.59(0.22-1.55) remain within the Acceptable levels.



MUAC measurement in one of the Qub qub village. Sool Plateau, Bari region. FSNAU May 2011

- Burao IDPs: A deterioration to a Critical nutrition situation with GAM rate of 19.3% (14.9-24.7) and SAM rate of 5.7% (4.2-7.7) recorded. The retrospective Crude and under five death rates of 0.56 (0.30-0.91) and U5MR 2.02 (1.21-3.34), which show a Serious situation with excessive deaths, based on WHO classification.
- Berbera IDPs: A sustained Serious nutrition situation with GAM of 14.5%, and SAM of 3.0%. The retrospective Crude and under five death rates of 0.28 (0.15-0.54) and U5MR 0.16 (0.03-0.88), which are Acceptable based on WHO classification. The deterioration in Burao is likely a seasonal trend normally related to availability of casual labour for the IDPs.

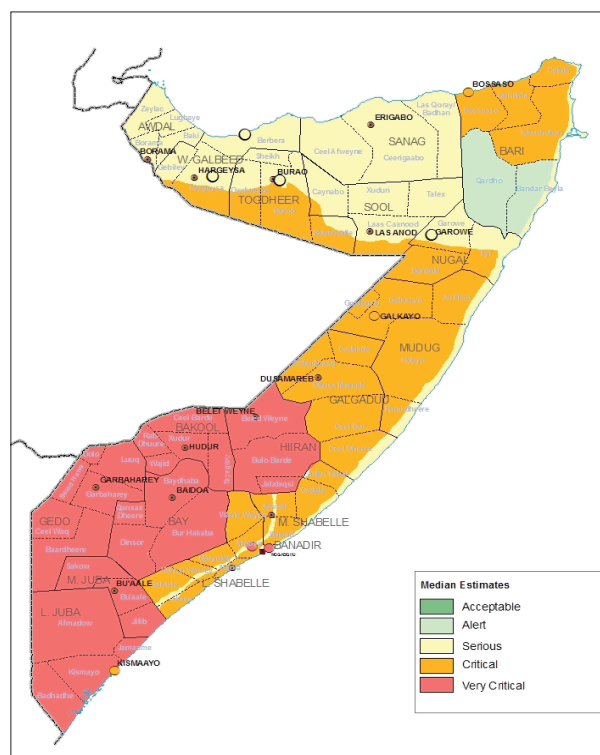
A summary of the findings is provided in the table below. Details on the findings will be presented in the May-June 2011 Nutrition Update, which is due for release at the end of June 2011.

Survey Findings – Mogadishu (April 2011), & IDPs in the North (June 2011)					
Population Assessed	Global Acute Malnutrition	Severe Acute Malnutrition	Retrospective Crude Death Rate (90 days)	Retrospective Under five Death Rate (90 days)	Estimated Nutrition Situation
Mogadishu City	15.2% (10.9-20.7)	1.7% (0.9-3.1)..48)	1.81 (1.38-2.37)	2.2 (1.41-3.48),	Critical
Hargeisa IDPs	10.9% (8.1-14.5)	2.2% (1.0-5.0)	0.37 (0.19-0.73)	0.59 (0.22-1.55)	Serious , sustained from Deyr' 10/11
Burao IDPs	19.3% (14.9-24.7)	5.7% (4.2-7.7)	0.56 (0.30-0.91)	2.02 (1.21-3.34)	Critical , deterioration from Deyr' 10/11
Berbera IDPs (Exhaustive)	14.5%	3.0%	0.28 (0.15-0.54)	0.16 (0.03-0.88)	Serious , sustained from Deyr' 10/11
Garowe IDPs	20.5% (17.6 -24.0)	1.8% (0.9-3.7)	0.37 (0.19-0.73)	0.59 (0.22-1.55)	Very Critical deterioration from Deyr' 10/11

Preliminary integrated analysis of data from a range of sources; the health information system (HIS), mid upper arm circumference from rapid nutrition assessments or screening, and secondary data on admissions trend of acutely malnourished children into selective feeding programs, indicate a persistent alarming situation in the South, Central and parts of Bari region. This is consistent with the FSNAU estimates of the nutrition situation for April 2011 (Map 3).

FSNAU and partners are scheduled to conduct 31 representative nutrition surveys throughout Somalia in June –July, covering rural livelihoods, the urban population in Somaliland and Puntland, and IDPs in Afgoye corridor. Findings will be shared in upcoming FSNAU publications.

Map 3: Estimated April 2011 Nutrition Situation



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The food security situation of the urban population has been steadily worsening, as prices of staple cereals as well as imported commodities continued to increase dramatically in the current year. Continuous disruptions in trade and economic activities as well as population displacements caused by sustained civil strife in southern and central regions (Mogadishu, Juba, Gedo, Bakool, Hiran and Central) further exacerbated the food security situation (see Civil Insecurity Sector) in urban areas. As a consequence, the cost of living surged by an average of 35 percent from a year ago in SoSh zones (South, Central and North), undermining purchasing power of urban population. These developments prompted FSNAU to update (May 2011) the numbers of urban population in crisis to 590,000 people, which corresponds to about 25 percent increase from the previous estimations of 475,000 for the January-June 2011 period (see Technical Series No VI. 36, Food Security and Nutrition Analysis Post *Deyr* 2010/11).

The cost of the minimum basket (CMB) continued to follow an upward trend as a result of the soaring prices of staple cereals, fuel and other imported food items in all SoSh zones of the country (Figure 7). The CMB has increased considerably since December 2010 (14-21%) and May 2010 (26-51%) in the main markets of SoSh areas, especially in the South. In the North SISH zones, food prices and cost of living remained stable showing only a slight 6 percent increase in the first quarter of 2011. In USD terms, the highest cost of living is still observed in North SISH and North SoSh zones, equivalent to \$139- 143; the lowest is \$91 in the South. The wide differential in the cost of living in USD terms is attributable to the strength and stability of the different exchange regimes in the zones as well as higher living standards in the North.

The labour wage rates exhibited mixed trends in different zones and towns of the country. For example, in the South, the aggregate wage rates in Juba and Sorghum Belt showed a marginal to moderate decline from the rates reported in December (7% in Juba and 10% in Sorghum Belt, respectively) and May last year (22% in Juba and 8% in Sorghum Belt, respectively). However, the wage rates in Shabelle showed an increase of 10-21 percent from December last year due to increased labour availability with the start of *Gu* agricultural activities. Nevertheless, the wage rates are still 17 percent lower than in May last year due to high supply of labour. Further, the trend in Central is stable since December 2010, while the daily labour wage rates in May 2011 dropped by 12 percent when compared to a year ago. In the North SoSh zone, wage rates have not changed from their levels 6 and 12 months ago, while they indicated an increase of 10 and 15 percent over the same period in North SISH zone, as a result of increased agricultural and livestock export related activities.

With the rising cost of living, the purchasing power of the urban poor continues to weaken, impacting their access to food. For example, the ToT between labour and local cereals plummeted significantly in all SoSh zones since the start of 2011 and are considerably lower than one year ago (May '10). This is demonstrated by considerable declines in ToT labour to main staple cereals (white maize and red sorghum) in the southern regions since December 2010 (40-43%) and May 2010 (60-62%). Similarly, significant declines in ToT are observed in Central (Dec '10- 20% and May '10 - 50%) and in the North SoSh (Dec '10- 20% and May '10 - 43%). However, in the North SISH zone the ToT between labour wage to white sorghum has dropped at a relatively lower rate, by 9 and 17 percent respectively. In absolute terms, the highest ToT of 10 kg per daily wage in the country during May 2011 was recorded in the North SISH zone, while the ToT in SoSh areas ranged from 3 to 5 kg of cereals¹ per daily wage (Figure 8). With continued rise in food prices and the sporadic conflict in the parts of South-Central, the cost of living is likely to maintain or further escalate for the urban population. FSNAU is conducting a comprehensive representative urban survey in northern regions and rapid urban assessment in South-Central to estimate the numbers of urban population in crisis up to the end of the year. The updated estimates will be issued in August 2011.

Figure 7: Trends in the Cost of The Minimum Basket

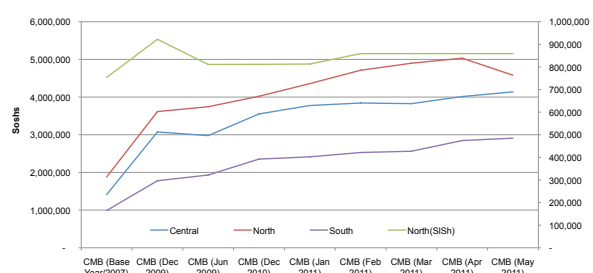
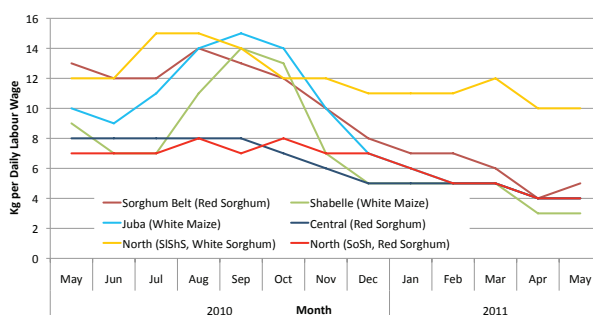


Figure 8: Trends in Zonal Terms of Trade (Labour to Cereal)



¹ Red sorghum was used in ToT for Central, Northeast and Sorghum Belt; white maize was used for Juba and Shabelle regions.

Northern Regions

Food security situation is favourable in most livelihoods of the Northwest due to positive developments following good *Gu* rainfall performance, which alleviated water shortages and contributed to improvement of rangeland, and, consequently, livestock conditions. Livestock production and reproduction is near normal in W.Galbeed and Awdal regions owing to average to *Karan* good rains in 2010 and in the current *Gu* 2011 seasons. However, Sool Plateau of Sanaag region as well as parts of upper Nugal are likely to remain in crisis due to high livestock off take over the period of *Jilaal* and increased indebtedness to cover the high water trucking, migration and food costs over the months of drought. The situation in agropastoral areas will depend on the performance of *Karan* rains, which will determine the level of *Gu/Karan* harvest, hence availability of staple cereals in the region. Currently, reports indicate a near normal crop establishment in Awdal region.

On the other hand, in the Northeast livelihoods pasture and water availability improved due to average *Gu* rains, which led to recovery of the livestock body condition and improved livestock prices. Yet production, reproduction of sheep and goat are not promising due to poor livestock performance since *Deyr* season, with the exception of camel. Thus, the areas currently in crisis are likely to remain in crisis as a result of reduced herd size and number of saleable animals following high off take (death, distress sales) and limited capacity to re-stock in the short-term. Therefore, high livestock prices in the coming *Ramadan* and *Hajj* period will hardly benefit poor pastoralists. In addition, the likelihood of higher cereal (rice) prices during the monsoon season as well as limited supplies of local cereals from the South will continue to undermine poor households' budgets.

Central (Galgadud , Mudug) and Hiran Regions

Central and Hiran regions are likely to remain in crisis despite some improvement to rangeland and water resources brought about by the long rainy season, which provided some relief to pastoral communities after prolonged harsh *Jilaal* dry season. Following the improvements of pasture, browse and water conditions, small ruminants are recovering from the effects of the drought, although cattle and camel will require a longer period for full recovery. However, availability of rangeland resources is inadequate in Hawd and parts of Addun because of below average *Gu* rainfall, while migration options from these areas are limited due to clan barriers. Reproduction (births) of small ruminants is expected by October 2011, while few camels already gave births in May and few more are expected to deliver in June-July. Thus, improvements in milk consumption and sales are anticipated in the short-term. However, current milk availability is still below average due to high rates of camel abortion during the *Jilaal* season. Further, over the period of prolonged dry weather conditions, pastoral livelihoods experienced high livestock off take, particularly in coastal areas, where an increasing trend of pastoral destitution was also reported. Although livestock prices are likely to improve with the coming *Ramadan* and *Hajj* periods, poor households will benefit little due to limited livestock holding.



Average pasture and goat body condition. Hawd, of Togdheer region. FSNAU, May 2011



Increased water availability. Sool Plateau, Sanag region. FSNAU, May 2011



Progressing recovery of camel body condition. Toore, Hobyo, Mudug region. FSNAU, May 2011

In agropastoral areas, the situation is likely to improve in the Cowpea Belt as a result of expected average *Gu* harvest. Conversely, poor crop harvest is projected in cropping areas of Hiran region. Cattle condition remains poor in both regions and no reproduction and production are anticipated up to the end of the year. Additionally, considering less favourable prospects of local cereal supply from *Gu* harvest in southern Somalia, cereal prices are likely to be high over the coming months, which will continue to weaken peoples' purchasing power.

Southern Regions

The food security situation is deteriorating in southern regions as a result of second consecutive season of low cereal production following poor seasonal rain performances (*Deyr* '10 and *Gu* '11). Although the *Gu* rains alleviated water and pasture/browse stress in pastoral and agropastoral communities, the improvements will not be visible in the short-run considering high livestock off take and deteriorated body condition of the livestock over the months of harsh *Jilaal* dry season in the region. As a result, low-milk production following low calving/kidding and reduced income from livestock sales due to lack of saleable animals are anticipated in most pastoral and agropastoral livelihoods.



Poor maize crop establishment. Kamsuma, Jammame, Lower Juba. FSNAU, May 2011

Further, income and food sources of riverine and agropastoral livelihoods are going to be affected by forthcoming below normal *Gu* crop production and absence of any carry-over stocks. The regions that suffer most include Lower Juba, Middle Juba (Sakow/Salaagle), Lower Shabelle as well as most of the Sorghum Belt regions (Gedo, Bakool and Hiran regions). The main driving factors of anticipated low *Gu* season harvest in these regions include delayed agricultural activities (planting, weeding and irrigation) as a result of an inadequate major rainy season, as well as low tillage capacity and utilization of farm inputs, primarily due to increased fuel prices and limited availability of seeds following the last *Deyr* 2010/11 crop failure. Conversely, relatively better outlook for sorghum production is evident in the major sorghum growing region of Bay, although it is still projected to be below normal. The cereal availability may somewhat improve in Juba and Shabelle regions if the expected *Hagaya* rain (June-early Aug) performance is average to good, which will bring an opportunity for off-season crop production in these regions (Sep-Oct '11). Overall, the current outlook of *Gu* crop production indicates a continuation of inadequate local cereal supply within the country, hence high cereal prices, weak purchasing power of both rural and urban poor and lower middle households, limited social support and low job opportunities on the background of volatile security situation and limited humanitarian space in the region.

Recent and forthcoming publications and releases

FSNAU Press Release, June 2011

FSNAU/FEWSNET Climate Data Update, May 2011

FSNAU/FEWSNET Market Data Update, May 2011

Nutrition Update, May-June 2011

FSNAU Technical Series Report Nutrition Situation, February 2011

FSNAU Technical Series Report, Post Deyr 2010/11 Analysis, March 2011

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

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