

KEY FINDINGS

Based on the results of the rapid preliminary *Gu* season field assessment carried out in June 2012 and monthly monitoring of food security and nutrition situation, **FSNAU projects a total number of people in a food security crisis is likely to remain unchanged in the second half of the year.** This forecast will hold under

the conditions of continued humanitarian support (cash and food), which was extended to 3.4 million people in January-April this year. The impact of the assistance is seen in improved access to food, social safety nets and household incomes to allow for restocking of livestock, as well as the overall improved nutrition situation in the country.

However, the food security situation is going to deteriorate in the agropastoral areas in the South where **below average *Gu* rainfall in most of the rain-fed farming areas suggest an inevitable shortfall of *Gu* harvest.** Below average to poor harvest is expected in all rain-fed regions of the Sorghum Belt, inclusive of the major sorghum producing region of Bay, which normally accounts for almost two-thirds of the total sorghum production of the country. This prospect is particularly concerning for poor farmers in parts of crop-dependent agropastoral areas in the South (Bay, parts of Juba, Shabelle, Bakool and Gedo), who normally derive about 4-6 months of cereal supplies from the *Gu* season. A meagre crop production is also likely in the agropastoral zone of Central following erratic and below normal *Gu* rains combined with pest infestation, which will have implications on the food access of households in this livelihood.

Concerns remain also about sheep/goat pastoralists along the Indian Ocean coastline of the central and northern zones and a western part of the coastal areas (Awdal and W. Galbeed regions) in the Gulf of Aden, which received poor to no rainfall. However, the food security situation is likely to continue improving in most of the other livelihoods of the country, including most pastoral areas and Mogadishu. **Therefore, anticipated decrease in the numbers of population in crisis in parts of these livelihoods will counterbalance the increases in agropastoral areas in South-Central.**

Given the above forecast, continued humanitarian support is of utmost importance, particularly in the context of prevailing ***Very Critical*** nutrition situation in southern Somalia, which is expected to remain unchanged in most parts of the region. The exceptions are Lower Shabelle and the Mogadishu urban population where some improvements are likely in the second half of the year. The northern and central regions are expected to remain in ***Serious-Critical*** nutrition phases. Internally displaced persons (IDPs) are likely to remain in a ***Critical-Very Critical*** nutrition phase in most settlements. The major contributing factors of the current high malnutrition levels in Somalia include low milk availability due to limited livestock holding among the poor stemming from the effects of past droughts; disease incidences associated with consumption of unsafe water and lack of health care services; and chronic long-term challenges such as poor child feeding and care practices.

Thus, the major assumptions of the current outlook of sustained food security crisis include:

- projected below average cereal harvest in agropastoral areas in the South
- improving situation in most pastoral areas given favourable livestock prices, anticipated increase in herds and milk production, and high export demand
- increased humanitarian access in South-Central to moderate the impact of the *Gu* harvest shortfall
- relative stability of cereal prices and of the minimum cost of living in the context of increased flow of food due to humanitarian interventions and a functional Mogadishu port
- further improvements in terms of trade between cereals and goats or for labour wages under the conditions of continued humanitarian support

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Special
Articles

Integrated
Food Security
Analysis

FSNAU - Somalia

United Nations Somalia,
Ngecha Road Campus
Box 1230, Village Market,
Nairobi, Kenya
Tel: +254-20-4000500
Cell: +254-722-202146
/ 733-616881
Fax: +254-20-4000555
Email: info@fsnau.org
Website: www.fsnau.org

Somalia Seasonal Timeline & Key Events



Cereal harvest outlook and its impact on prices

- The forecasted underperformance of the *Gu* cereal harvest is largely due to anticipated below average to poor sorghum production in the South as a result of erratic rainfall and pest infestation. However, the prospects are more optimistic for the maize harvest, which is mostly obtained from riverine areas where there is irrigation supported crop development. Thus, the *Gu* cereal harvest is expected to be close to normal in the Shabelle regions, which normally account for about 55 percent of the total cereal production in southern Somalia. In addition, the *Hagaa* rains will bring opportunities for off-season crop production in Lower Shabelle and Juba regions. Average sorghum production in the Northwest (Awdal and W. Galbeed) is likely in October-November this year given the near average *Karan* rains forecast.
- Cereal prices exhibited declining trends in 2012, showing relative stability or slight increases in some areas during May. This trend is largely attributable to increased cereal availability from a very good *Deyr* 2011/12 and off-season (Mar-Apr '12) cereal production and on-going humanitarian interventions. Current cereal price dynamics suggest that the prices will continue declining in July with the start of the *Gu* harvest.

Key pastoral livelihoods are likely to see some improvements

- In most key pastoral areas, including Hawd, Sool, most of Nugal and Addun, Southern Inland Pastoral and South-East Pastoral, the pasture and water conditions are average to good, which positively impacted livestock conditions in most areas. These livelihoods contain almost two-thirds of the total pastoral population of the country. Increased reproduction among big ruminants is expected from June 2012 onwards, which will increase milk availability in the post-*Gu* period. Herd size of sheep and goat started to improve since earlier this year following the effects of the favourable *Deyr* season. The livestock prices have been increasing since December 2011 in most markets throughout Somalia due to improved body condition, restocking and high demand in the run-up to *Ramadan* (Jul-Aug). The prices are likely to increase further with a rise in demand during the upcoming festival of *Hajj* in October. The anticipated high demand for livestock, and consequently higher livestock prices, improved milk access and increased livestock reproduction will be the major food security drivers of pastoral and livestock-dependent agropastoral households in the coming months. Livestock exports through northern ports (Bossaso and Berbera) in the first quarter of 2012 were 42 percent higher compared to the same period last year.

Urban food access

- The food security situation has been improving in the current year for market-purchase dependent urban households, following a decline in the cost of living and improving labour wages. The Minimum Basket Cost (MEB) in the local currency (Somali shilling-SoSh and Somaliland shilling-SlSh) remained relatively stable in SlSh areas but decreased in other regions by an average of 14 percent in January-May 2012 and by 25 percent compared to a year ago (May '11). The composition of food in the total MEB has declined from as high as 82 percent last year to 72 percent currently in South-Central. Therefore, the purchasing power of the urbanites considerably improved in the last six month. These positive trends are largely due to increased supply of food in the country, following a good last season's production, humanitarian interventions, opening up of the Mogadishu port which allowed for increased imports. In addition, increased investment opportunities in Mogadishu city had a positive reflection on labour wages. The recent survey (April '12) in Mogadishu indicated considerably improved food consumption and increased employment among the urban and IDP population alike compared to the survey of December last year. The urban food security in the country will largely be driven by food price trends and the security situation given its implications on economic activities and humanitarian access.

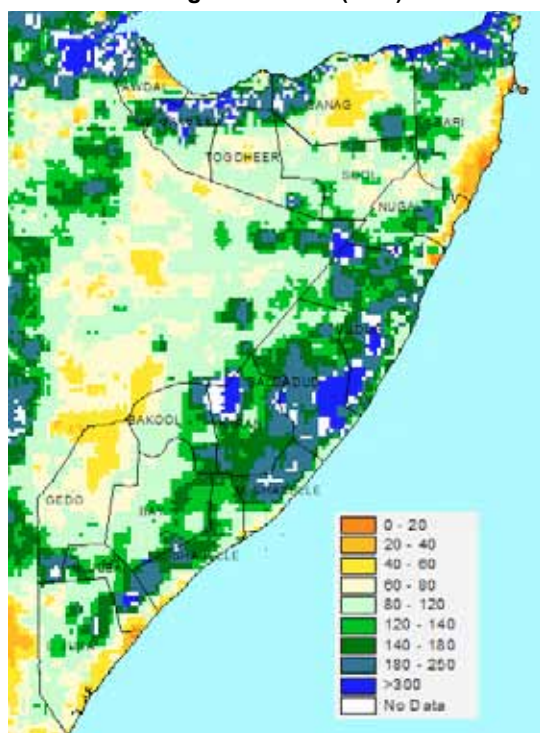
Nutrition situation

- The nutrition situation across Somalia is likely to remain unchanged since January 2012. This forecast is valid up to end July 2012 and is based on the following factors: historical nutrition trends; the food security and the health situation. Major shifts in the nutrition phase are not typical for Somalia based on FSNAU time trend series, 2008-2011. Hence, northern and central regions are projected in *Serious-Critical* phases, which are typical for this time of the year. Southern regions will likely remain in *Very Critical* phase except for Lower Shabelle where average crop harvests are anticipated, which could lead to improvements to a *Critical* nutrition phase. Internally displaced persons (IDPs) are likely to remain in *Critical-Very Critical* nutrition phase except for Hargeisa IDPs, in sustained *Serious* phase, Mogadishu IDPs are in *Critical* based on surveys conducted in April-June 2012. In addition, Mogadishu urban are expected to remain in *Serious* phase based on April 2012 surveys.

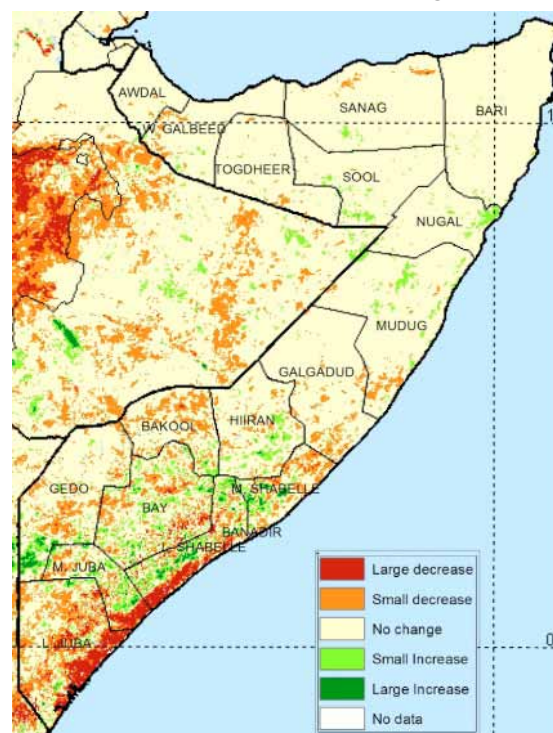
SECTOR HIGHLIGHTS

CLIMATE

Map 1: April - May 2012 NOAA RFE Rainfall as % of Long Term Mean (LTM) mean



Map 2: June Dekad 1, 2012 SPOT NDVI Absolute Difference from long term



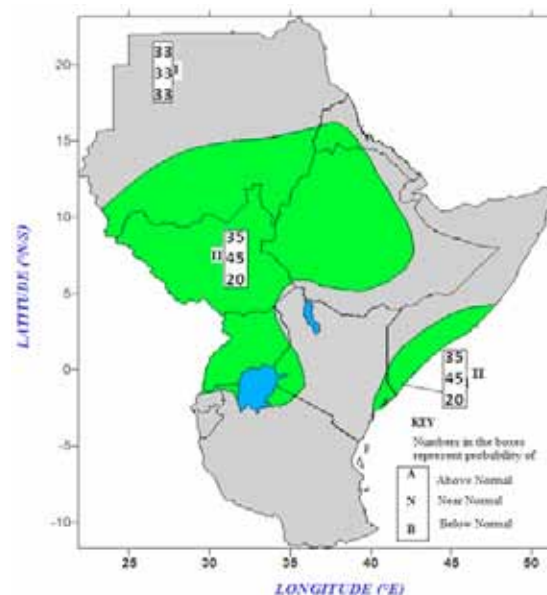
Rainfall Performance

Satellite rainfall estimates confirmed by ground reports, suggests that the start of the *Gu* rainy season was delayed, and overall precipitation was below normal with erratic distribution both in space and time. In May, which is very crucial for crop development and pasture regeneration, the rainfall performance in South-Central was light to moderate with long dry intervals. However, the key pastoral areas of the North received fairly good rains. Intensity and spatial coverage of the *Gu* 2012 rains varied throughout the country. **Northwest:** Most regions received moderate to heavy rains (80 - 120 % of LTM) with below average rains (40-60% of LTM) in parts of Sool, Sanag and Awdal regions (Map 1). **Northeast:** There were light to moderate rains with average spatial distribution excluding the Coastal *Deeh* of Iskushuban where rains were poor. **Central:** The Coastal *Deeh*, Cowpea Belt and parts of the Addun pastoral areas of the central regions received light showers with average to good spatial distribution. The rains were light to moderate in the Hawd pastoral areas of Galgadud and moderate to good in the rest of Hawd. **South:** Most regions received light to moderate rains with below average distribution. However, Hirran (pastoral) as well as Bay and Bakool received light to moderate rains with average spatial distribution.

Vegetation Conditions

The satellite derived Normalized Difference Vegetation Index (NDVI) indicates normal vegetation in most of the pastoral areas. However, significant agricultural areas of the country show a decrease of vegetation following the *Jilaal* dry season and an overall below normal *Gu* rains. Large decrease of vegetation is evident in large parts of Lower Juba, the coastal pastoral areas of Juba and Lower Shabelle and pockets of the agropastoral areas of Bay and Lower and Middle Shabelle. A small to large decrease of vegetation is depicted in Bay, Bakool, Gedo, Hirran, Mudug and Galgadud regions (Map 2).

Map 3: Climate Outlook Forum - June to August 2012 rainfall Forecast



Climate Outlook for the Coming Hagaa Season (June-August 2012)

The 31st Greater Horn of Africa Climate Outlook Forum (29-30 May 2012) meeting of IGAD Climate Prediction and Application Centre (ICPAC), the National Meteorological and Hydrological Services, the World Meteorological Organization (WMO) and other partners in the Horn of Africa, generally concluded an increased likelihood of near normal to above normal *Hagaa* rainfall (Jul – Sep 2012) in coastal areas of Juba and the Shabelle regions. Normal conditions for the season is projected in the rest of the country (Map 3). This implies Karan rains starting from July in the Northwest (W. Galbeed, Awdal and parts of Togdheer and Sanag regions) and dry conditions in the remaining parts of the country.

SOUTHERN AND CENTRAL SOMALIA: *Gu* 2012 FLOODS

In this *Gu* season, southern and central Somalia experienced river and flash floods in late April and early May. In the South (Lower Shabelle), the man-made river flooding affected both cropped and fallow farmlands albeit insignificantly. This was largely due to river cuts, weak embankments and efforts to divert water from the river to the farmlands. In Middle Shabelle, floods were as a result of natural river flooding brought on by previously open river cuts and weak river embankments. In the Central region severe flash floods significantly affected one village (Gosol) in Galkayo of Mudug displacing the entire village as well as destroying assets.

Specifically, in the third *dekad* of April, an effort to divert water by some farmers to their farmlands owing to the prevailing low-water levels in the river-produced floods in the Kurtunwaarey district (Bulo-Warbo, Allafuto and Towfiiq villages) in Lower Shabelle. As a result, crops were damaged albeit insignificantly (50-100ha of harvested sesame still in the fields as well as 100ha of early planted maize), while an estimated 400ha of fallow land was inundated. In addition, some minor feeder roads were cut off hampering transport. Flooding in Towfiiq was contained by the local community leading to a significant reduction of damage to the harvested sesame in the fields.

In the first *dekad* of May, severe flash floods inundated the entire village of Gosol settlement (Mudug region) leaving a total of 900 people displaced and causing livestock deaths due to the “chill factor” brought on by cold and damp weather during flooding. A multi-agency (UN/INGOs) flood assessment mission was carried out together with the local authorities in the third week of May to address the immediate needs per sector¹. In the second *dekad* of May, natural river flooding due to the weak river embankments occurred in the Middle Shabelle, about 8-10 kilometers east of Jowhar. As a result, the farmland of 1,084 households (400-500ha) planted with maize and cowpea were affected. However, through local community efforts, all the active breakages were fixed at the start of the flooding, significantly reducing the damage to the crops (maize and cowpea). This is with the exception of one village (Raqayle) of Jowhar district where there is still frequent breakage of the embankment and deep concerns associated with the impacts of excessive water to crop development. Nonetheless, the process of containing the breakage is underway. Within the same period, flash floods were reported in Bay (Burhakaba) destroying either sides of Bohosha stream banks and property in the town (10-12 houses and commercial stores).

The table below provides summary of flood impacts in the regions affected.

Region/District	Villages Affected	Type of Flood	Effects of Floods	Period
Lower Shabelle (Kurtunwaarey)	Bulo-Warbo, Allafuto, Towfiiq	Human-induced river floods	No human displacement; Transport in the minor feeder roads cut-off; Inundation of about 400ha of fallow lands; Minimal destruction to cropped fields (50-100ha harvested sesame and 100ha early planted maize); Water logging remains a major concern.	3 rd <i>dekad</i> April
Mudug (Galkayo)	Gosol	Flash floods	Most severe flooding with the whole village inundated; All the villagers (150 households) were displaced but no human deaths; Livestock deaths (100 sheep and goat and two donkeys) brought on by chill factor.	1 st <i>dekad</i> May
Middle Shabelle (Jowhar)	Raqayle, Gashanle, Magay, Baqdad, Xanooley, Towfiiq, Bardhere, Kulmis yarrow, Maqdas, Jameco, Barey	Natural river floods	Reduction in the total area planted; Inundation and destruction of about 400-500ha cropped and fallow farmlands; 1,084 households' crops damaged.	2 nd <i>dekad</i> May
Bay (Burhakaba)	Burhakaba town	Flash floods	Houses (10-12) and commercial stores destroyed in the town; Bohosha water stream banks destroyed on either sides.	2 nd <i>dekad</i> May

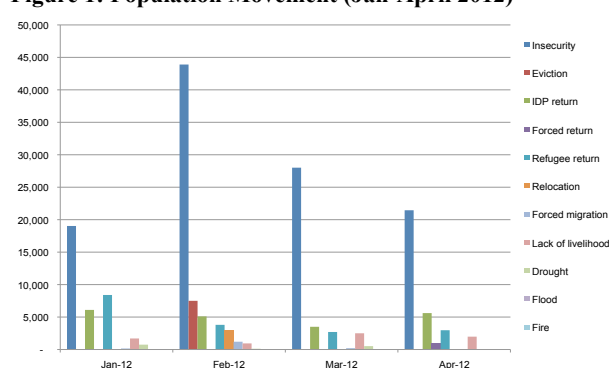
CIVIL INSECURITY

In South-Central civil insecurity, mostly driven by political conflicts, continued to persist since January 2012. The impact of prevailing insecurity is reflected in population displacements; disruption of economic activities and livelihoods; interruption of trade flow and commodity movements, as well as restricted humanitarian operations. Confirmed field reports and secondary information in April/May² indicate intensified conflict in parts of southern Somalia. Specifically, conflict between the Transitional Federal Government (TFG), supported African Mission for Somalia (AMISOM), and the Anti-TFG militias (Al-Shabaab) escalated in Lower Shabelle (Afgoye corridor and Afgoye district). In the Juba regions, TFG and the Kenyan army accelerated their offensive against the anti-TFG militias, capturing a few more territories including Afmadow. In Bay, Bakool, Gedo and Hiran regions, tension is high with sporadic confrontations between the opposing parties, while in Mogadishu episodes of violence is reported in parts of the city despite marked improvements in the security situation since September 2011 when TFG gained control of the city. In Central, the fighting in Galgaduud between the different factions escalated into the Elbur district where Ahlu-Suna militias backed by the Ethiopian forces took over the town. In the North, tension still persists between the Somaliland government and militias supporting the Khatumo state in Sool/Togdheer regions. Few casualties were reported. No resource-based conflicts were reported in the rural areas in this reporting period.

Direct and Indirect Impacts

According to the United Nations High Commission for Refugees (UNHCR), an estimated total of 1.36 million people are displaced nationwide, with an average of 43,000 people displaced on a monthly basis between January-April 2012. Nearly two-thirds of the civilian population displacements in this reporting period was largely attributed to civil insecurity followed by IDP and refugee returnees (Figure 1). The bulk of the IDP population are from the conflict-ridden areas of the South. The April Population Movement Tracking (PMT) report provides an estimated 33,000 people who are displaced in Somalia with 65 percent (21,000 people) security-related displacements in Lower Shabelle, Lower Juba, Bay and Bakool regions. According to UNOCHA's Humanitarian Bulletin (May 2012), an estimated 18,000 people have fled from the Afgoye corridor to Mogadishu between 22 and 30 May as a result of the new TFG/AMISOM offensive. Similarly, the Somaliland-Khatumo conflict in Togdheer continues to affect at a lower level movement of the population and trade activities.

Figure 1: Population Movement (Jan-April 2012)



Source: UNHCR/IASC PMT reports

Livelihood activities, including trade and market access in the conflict-ridden areas, have been affected. For instance, in Hiran (Beledweyne town) the daytime curfew imposed since February 2012 has impacted the livelihoods of the poor households as they mainly depend on daily activities, such as portage, construction work and petty trade. In Gedo, disruption of intra-regional trade flows and access to job opportunities pose a challenge to the civilian population in parts of Luuq (Bashiir and Yurkud) and Bardera (Faafahdhuun and Tarako). Trade and population movement is also severely affected in Lower Juba owing to heightened insecurity. Shelling of Kismayo town in late-May further affected the already declining function of Kismayo port, constraining trade activities in the Juba region. This is reflected in the high cost of the MEB (USD 98-USD116) compared to other regions in the South (USD76-96, on average) as well as, in reduced livestock supply to markets to avoid taxation imposed by the warring factions. Likewise, trade in livestock between Burao and Buhoodle in the North has been disrupted owing to the Somaliland-Khatumo conflict.

According to UNOCHA Somalia, in April³ security and humanitarian access remained a challenge in South-Central Somalia, as the militias continued to operate in the areas of Baidoa, Beletweyne and Hudur. In Middle Shabelle, there are reports of confiscated relief items for distribution by the militias; in Mogadishu, distribution of food, shelter and other non-food items continued to be hampered by gate-keepers⁴ in the IDP camps.

With the TFG and AMISOM plan to expand their control in the South-Central, the conflict is likely to continue over the coming months and possibly will spread into other parts of the current hotspot areas in South-Central. This trend will cause population displacements and disruption in economic activities and will constrain humanitarian access in the short term.

² UN-OCHA Humanitarian Bulletin April & May 2012

³ Humanitarian Dashboard Somalia April 2012

⁴ Gate keepers are the so-called IDP representatives not necessarily selected from themselves

AGRICULTURE

Cultivation

The start of the *Gu* 2012 rains were timely resulting in an average cultivated area nationwide except for Hiran and the coastal areas of Lower Shabelle and the Juba regions. However, the crop established area is smaller than the area planted owing sporadic light and ineffective rains coupled with the prolonged dry-spells (30-35 days of moisture stress) in Bay, Bakool, Juba, Gedo, Hiran and Central in May-June 2012. Crops were further affected by an outbreak of crickets and grasshoppers in the agropastoral livelihoods of Bay, Bakool, Gedo and parts of Middle Juba resulting in replanting (2-3 times). In Shabelle, Hiran, Lower Juba and the Cowpea Belt of Central, a few incidences of pest attacks (white grubs, Aphids and stalk-borers) on crop seedlings were also reported. Conversely, in the *desheks* of the Juba regions and the riverine irrigated areas of Shabelle, Gedo and Middle Juba (Sakow and Buale), crop cultivation is average to near average. Exceptions are the coastal parts of Lower Shabelle and Lower Juba, which started dry early planting in early June in anticipation of the *Hagaya* rains in late June-August. Therefore, the *Hagaya* rain performance (June-July) along the coastal areas of Lower Shabelle and Juba regions is crucial for additional sowing and plant growth. Flooding, albeit minimal, was reported in Kurtunwarey (Lower Shabelle) and Jowhar (Middle Shabelle), with insignificant impacts on crop production (see *Flood Article*).

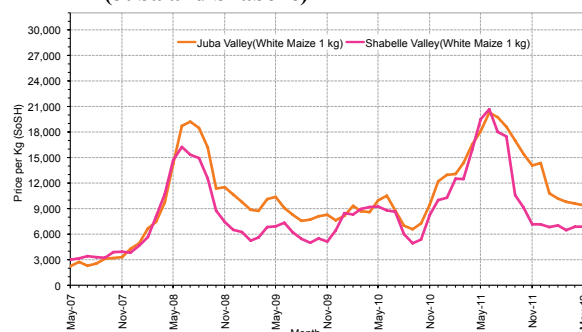
Harvest outlook

In South-Central, crops are currently at different stages of development (first weeding to milking stages) owing to the different timings in planting. As such, the continuation of rains into the last *dekad* of June is important for plant development. However, early indications for South-Central *Gu* cereal crop production is anticipated to be below average. In the rain-fed areas of the Sorghum Belt, Juba and Central, a below average *Gu* cereal production is expected. However, in the irrigated maize producing areas of Lower and Middle Shabelle cereal production (sorghum and maize) is likely to be average or near average because of the better irrigation facilities. In the Northwest area, crop cultivation is average due to near average *Gu* rains. However, cereal production, particularly sorghum, in the Northwest agropastoral areas will depend on the performance of the *Karan* rains, which will commence in late July 2012. A FSNAU and partner agencies' field crop production survey will be carried out across Somalia from 5-26 July 2012.

Cereal prices and farm labour

There were variations in price trends of local cereals between January and May 2012 in the markets nationwide. In most of the major cereal producing areas, a slight to moderate decrease was reported. Compared to December 2011, prices of maize and sorghum in most markets of the South showed a decreasing trend in Shabelle (5-15%), Juba (33-39%) and Sorghum Belt (38-64%) in May 2012, with the highest cereal decrease recorded in Bay. This is attributable to cereal availability in the markets following a good *Deyr* 2011/12, off-season cereal production and humanitarian support. However, starting from April, cereal prices showed slight increases (5-15%) in the markets of Lower Shabelle and Bay as the better-off farming households are holding on to cereal stocks due to the presence of humanitarian support, while most poor farming households exhausted their stocks from the *Deyr* harvest in March. A slight decrease in cereal prices is also reported in Central (3%), Northeast (15%) and Northwest (10%) in the same period. Compared to a year ago, maize prices have decreased significantly in maize-producing regions of Shabelle (60-73%) and Juba (30-65%). Sorghum prices followed a similar trend with significant decreases observed in the Sorghum Belt regions of Bay (74-88%), Bakool (73%), Gedo (55-80%) and in Central (40%), while slight decreases were recorded in the Northeast (10%). With the continued humanitarian support the prices are likely to decline in the coming months following the start of harvest collection from July 2012 (Figure 2 and 3).

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



Fertilizer Application in a Good Rice Field. Jowhar, Middle Shabelle, FSNAU, June 2012.

Agricultural labour opportunities for the poor households improved with the onset of the *Gu* rains in April owing to increased agricultural activities in most of the rain-fed agropastoral areas in the South. However, in light of anticipated poor *Gu* rains in May and June, farm labour opportunities declined, except for the Shabelle sorghum-producing areas. Conversely, in the riverine areas job opportunities largely improved as a result of intensified agricultural activities (cereal and cash crop production), as well as the presence of Cash-for-Work activities such as rehabilitation of canals in Lower Shabelle, Gedo (Belet Hawa and Luuq) and Hiran riverine (Jalalaqsi and Buloburti) and rehabilitation of water catchments in the agropastoral areas of Wanlaweyn, Garbaharey, Jalalaqsi and Buloburti.

LIVESTOCK

Livestock production, reproduction and trade have shown gradual improvements in most of the key pastoral and agropastoral areas over the past five months. Herds of small ruminants have grown since the last *Jilaal*. Similarly, from June 2012 onwards the herd size of camel and cattle is expected to increase. Livestock prices improved in most of the main markets due to a reduced supply in the light of the previous droughts, increased livestock demand, restocking and improved livestock body conditions. However, the rangeland situation is below average and likely to negatively impact livelihoods early in the entire Coastal *Deeh* of the northern and central regions as well as some other parts of the North (Guban, parts of Sool and Nugaal) and Central (pockets of Addun and Cowpea Belt). The livestock assets in these areas have not recovered yet from the effects of past droughts. For the same reason, livestock (cattle) holdings have also diminished in the agropastoral areas of Adale and Aden Yabal of Middle Shabelle and South-East Pastoral of Juba and Lower Shabelle regions.

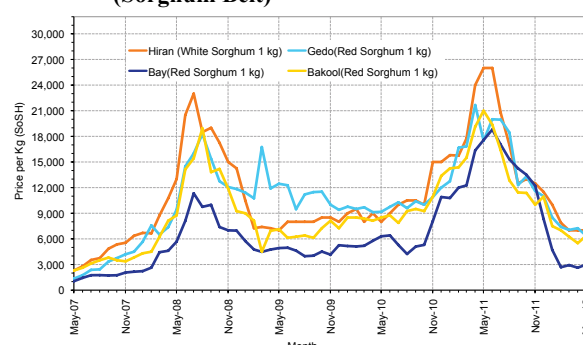
Pasture, Water and Livestock Migration

With the help of the excellent last *Deyr* season in central and southern Somalia and the recent *Gu* 2012 rains, pasture and browse improved and communal dams, natural ponds, private water catchments and *berkads* have been fully or partially replenished. However, early depletion of pasture and water is expected in Coastal *Deeh*, parts of Addun and the Cowpea Belt livelihoods of central regions due to poor and erratic *Gu* 2012 rains. Normal migration marked by large migration and overgrazing of moderately precipitated livelihoods (Hawd, parts of Cowpea Belt and Addun) will also likely to result in an early depletion of pasture and water. In the North, where *Gu* 2012 rains performed better than in the South and Central, pasture and water have also improved. However, the pasture is below average to poor in Guban, Gebi, Coastal *Deeh* of Iskushuban and Allula and pockets of Nugaal, Sool, Karkar/Dharoor and Golis due to below average to poor rains. Particular concerns were reported in Guban livelihood of Awdal and W. Galbeed, which have missed the *Hays* rains in the past two years, while the next *Hays* rains is only expected in a few months time (Dec.-Feb. '12). Normal to near normal livestock migration is reported in most parts of the country in this *Gu* season. In southern regions, despite the variability of rains in this *Gu* season, the pasture and water are considered to be near normal due to the effects of the previous *Deyr* 11/12 season. However, internal migration from the drought-affected areas to areas that have had rain were reported in Lower Shabelle and Juba regions. In July-August, over the coming months as the *Hagaa* season is likely to improve the rangeland conditions along the coast.

Livestock Body Condition and Production

The body condition of all livestock species in central, southern and parts of the northern regions remains average to above average, scoring 3-4 on a 1-5 scale of the Pictorial Evaluation Tool (PET). However, the livestock body condition deteriorated to below average (PET score of 2), particularly in Guban of Awdal and W. Gabeed regions. In this *Gu* rainy season medium kidding and lambing of goat and sheep is reported across the country. In parts of the northern regions goats gave birth during *Jilaal* period. Camels in the North and cattle in the South are expected to calve during the *Hagaa* (July-Aug). However, calving for most camels in the South/Central and parts of the North is expected

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



Improved pasture, Sool plateau, Bari region, FSNAU, June 2012

to take place in the next *Deyr* 2012/13 season. Due to the low calving during the last short rainy season, milk production is below average in most of Somalia. However, milk production will improve with the expected calving of big ruminants in July-December 2012. Breeding of small ruminants is at medium level in the North and South but low in Central; camel breeding is low to medium across the country and cattle breeding is also low in the South.

Livestock Trade and Prices

Livestock prices have been growing since December 2011 in most markets. Goat prices increased in Central (26%), Northwest SiSh (29%) and in Northeast (17%). In southern Somalia, goat prices rose in the regions of Shabelle and Juba (9%) and the Sorghum Belt by 23 percent. The yearly comparison indicate increased prices in all markets including Central (15%), Northeast (9%), Northwest (12%), Shabelle (39%), Juba (36%) and the Sorghum Belt (116%), specifically: Hiran-84%, Gedo-82%, Bakool-130%, Bay-196%. The increased prices are largely attributable to improved livestock conditions and increased demand in the wake of *Ramadan* (Jul-Aug). However, in the South, the price increases are also driven by fewer livestock following last year's drought and rural restocking supported by higher incomes due to a good *Deyr* 2011/12 harvest and humanitarian intervention. More pronounced yearly increases in the South compared to the rest of the country are primarily due to livestock prices that plummeted during last year's drought (46% decline in the first half of 2011) (Figure 4). Cattle prices in southern Somalia mostly exhibited increases in May 2012 compared to December 2011. The yearly comparison indicates considerable increases in the local quality cattle prices from the lowest levels during the drought period (Shabelle -73%; Juba -16%; Sorghum Belt -106%), resulting in improved livestock body condition, fewer livestock and possible restocking.

According to official port data, about 1,480,201 heads of livestock were exported from Somalia between December 2011 and May 2012. Two-thirds of the exports (66%) went through Berbera, while the rest was through the Bossaso port. Compared to the same period last year, there was a 45 percent increase in livestock exports in both ports. In preparation for *Ramadan* increasing demand from Saudi Arabia is among the contributing factors. There was no carcass meat export reported across the country over the last year due to increased demand for the live animal exports.

MARKETS AND TRADE

In January-May 2012, SoSh continued appreciating against the US dollar due to increased dollar inflow from humanitarian interventions and investments from abroad. The SiSh, on the other hand, declined modestly following the increased circulation of the currency in the economy and seasonal decrease in livestock exports. The gain in the SoSh, combined with humanitarian aid and increased imports through the Mogadishu Port, have contributed to a decline in the prices of essential imported commodities including red rice, sugar, diesel, vegetable oil and wheat flour in South and Central Somalia. In the northern areas, most imported commodity prices are stable or have slightly declined. Meanwhile, in the SoSh areas, inflation rates decreased significantly in South-Central and slightly in the North. The inflation rates have, however, increased in SiSh areas (3%).

Exchange Rate Trends

In 2012, the SoSh continued to strengthen against the US dollar, appreciating by 12 percent in January-May period in Banadir region to 22,000SoSh/USD in May 2012. The trend is uniform for other regional SoSh markets. The gain is



Medium Goat kidding, Hobyo, South Mudug, FSNAU, June 2012

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

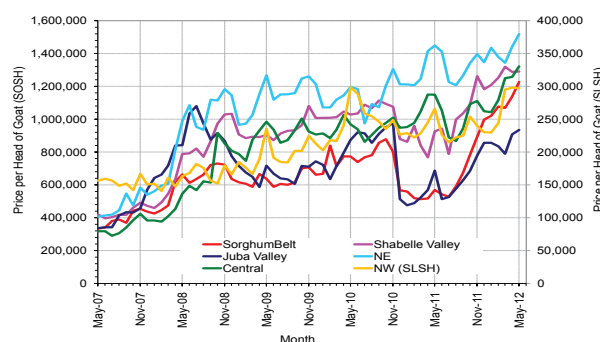
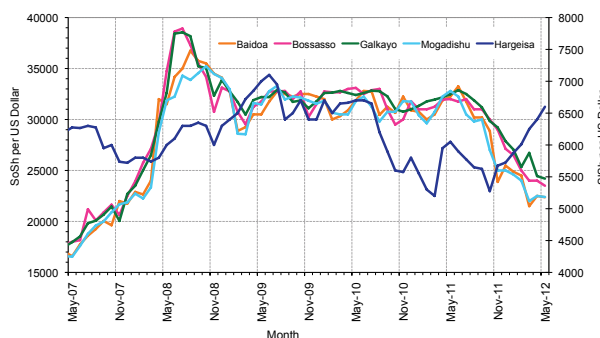


Figure 5: Monthly Exchange Rate for Selected Regions (SoSh and SiSh to USD)



much stronger, equivalent to 25-33 percent, when compared to the same period last year. According to field reports, traders attribute the strengthening of the shilling to US dollars (USD) entering the markets from aid agencies and countries funding Somalia reconstruction efforts. The SiSh, on the other hand, declined modestly (by 15%), since January 2012 in the markets of the SiSh zone. This is mostly attributable to increased circulation of SiSh in the economy and a reduced volume of livestock exports through the Berbera port and as a result fewer US dollars in the marketplace and printing of new currency notes by the Somaliland authority. On an annual basis, the currency rate loss is equivalent to 8 percent (Figure 5).

Imported Commodity Price Trends

Prices of most essential imported commodities monitored by FSNAU and FEWS NET (red rice, sugar, diesel, vegetable oil and wheat flour) have significantly dropped in the Southern and Central areas compared to last year (May 2011). The Banadir region exhibited the highest price decline (26-40%) from a year ago. The decline in the prices of these commodities is mainly due to a stronger SoSh and increased supplies from the Mogadishu Port as well as humanitarian aid.

In contrast, in the northern SoSh areas, most import commodity prices are stable or have declined slightly, due to the remoteness of some of the monitored markets, including Iskushuban, Beyla and Caluula where transport cost is exorbitant. In January-May 2012, in the SiSh zone, prices of rice, sugar and wheat flour declined slightly (5-9%) while diesel prices increased substantially (33%) due to supply constraints related to withdrawal by the major supplier ("Total" oil company) from the market. The price of vegetable oil has been stable over this period. Compared to last year, with the exception of diesel, import commodity prices are relatively stable due to stable supply conditions (Figure 6).

International trends of these commodities show a mixed picture. The export price of rice in May rose slightly (2%), mainly because of increased purchases ahead of *Ramadan*. Sugar prices declined for the third month in a row, reflecting an improved supply on international markets - larger availability in India, the European Union and Thailand, and new supplies from Brazil entering the market. Crude oil prices in Abu Dhabi (the major import source for Somalia) decreased slightly in the current year but are stable when compared to a year ago⁵. FAO's forecast for world cereal production in 2012 points to increases in rice, while wheat may decrease.

Total cereal imports through the Somali ports of Mogadishu, Berbera and Bossaso in the January-May 2012 period are 41 percent higher compared to last year, totaling 395,457MT⁶. The increased imports are recorded in all ports, with the largest increases (120%) recorded in the Mogadishu Port⁷. Cross-border cereal trade also continues through the regions bordering Kenya and Ethiopia, with a total of 2,510 MT of sorghum and maize inflow recorded in January-May 2012. This amount is 25 percent lower than the quantity traded during the same period last year, because of the exceptional cereal deficit at the time.

Consumer Price Index (CPI)

During January-May 2012, the CPI, measured through the changes in the MEB cost, indicates a decrease (14%) in all SoSh areas and a slight increase (3%) in SiSh areas. Annual inflation rates decreased significantly in Central (24%) and South (35%); while declining slightly (5%) in North SoSh areas. Change in the prices of sorghum, a major part of the food basket, is a key indicator for observing inflation (Figure 7).

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

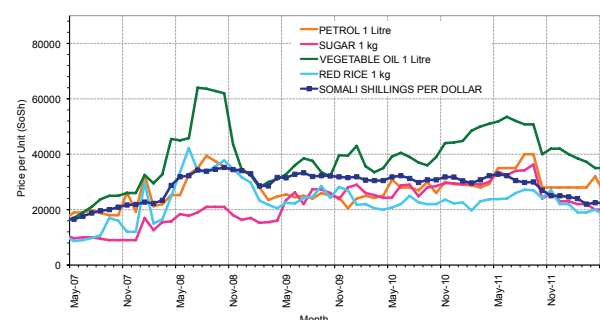
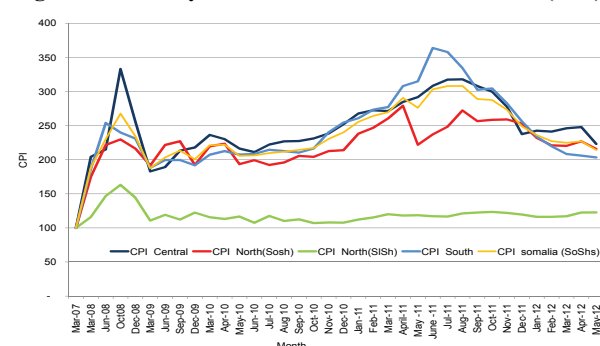


Figure 7: Monthly Trends in Consumer Price Index (CPI)



⁵ Weekly Abu Dhabi Murban Spot Price FOB (Dollars per Barrel), US Energy Information Administration, http://www.eia.doe.gov/dnav/pet/pet_pri_wco_k_w.htm

⁶ The figures include the cereal equivalents of pasta, rice and wheat flour. The May 2012 cereal import for Mogadishu is not included

⁷ The comparison period for Mogadishu port data is for January-April period only as May 2012 data is not yet available. The cereal imports through this port include both commercial and humanitarian cereals.

APRIL 2012 HUMANITARIAN ASSISTANCE LEVELS (FOOD SECURITY AND NUTRITION)

In spite of the security concerns and access challenges in South-Central (Baidoa, Belet Weyne, Hudur, Middle Shabelle and Mogadishu IDP camps), in January-April period an estimated 3.4 million people received assistance in all regions of Somalia. This represents a 104% of the targeted 1.7 million people to be assisted through improved access to food and safety nets; 133% of the targeted 1.1 million to be assisted through livelihood investment schemes.. Accessing food included direct food transfers and improving access to markets (food vouchers and cash relief) for an estimated 848,000 people. An estimated 1.6 million people further benefited from the livelihood support investment activities, which included distribution of vouchers to 33,313 households equivalent to 34,623 hours' worth of tractor-ploughing ; distribution of seeds (maize, sorghum⁸ and vegetable⁹); vaccination of an estimated 840,000 sheep and goats against Peste des Petits Ruminants (PPR) With exception of Bay and Bakool regions owing to insecurity and suspension of vaccination campaigns by the local authorities, vaccination centers were setup along the borders of Bay/ Lower Shabelle and Middle Juba regions.. An additional 73,280 people were estimated to have received water tanks and treatment vaccinations for their livestock. Investment in roads, canals and water catchment rehabilitation as well as river embankment protection were implemented through cash, voucher and food-for-work activities. Over 984,000 people in urban areas in acute food security conditions benefited from activities geared towards strengthening the existing social safety-nets. These included, nutritional intervention for children under five and their households through food and vouchers, emergency school feeding and household support to food insecure individuals and households with chronically ill members. An estimated 77 percent of the targeted malnourished children under the age of five were assisted with nutritional interventions in all regions of Somalia.

FOOD SECURITY AND LIVELIHOODS		NUTRITION	
<ul style="list-style-type: none"> Livelihood Support Investment Improving Access to Food Strengthen Existing Safety Nets 		Treatment of Acute Malnutrition 6 -59Mths	
Areas	Total Beneficiaries Reached as of April 2012	Areas	Total Beneficiaries Reached as of April 2012
Mogadishu	550,552	South	185,286
South	1,808,259	Central	35,461
Central	549,310	Northeast	19,298
North	496,703	Northwest	8,889
Total	3,404,824	Total	248,934

⁸ Authorization to distribute sorghum seeds in some districts in the Lower Juba and Middle Shabelle was denied by the local authorities, as a result some farmers planted using their limited sorghum seed stocks to take advantage of the rains.

⁹ Vegetable seeds were distributed to 3,300 women headed households (14% of the planned target) in the rural south

NUTRITION SITUATION

The nutrition situation for the period February-June 2012 is likely to remain the same since January 2012 in urban and rural livelihood zones of Somalia, with the northern and central regions in **Serious-Critical** phases, and the southern regions in a **Very Critical** phase. The exception is the Lower Shabelle Region, and Middle Shabelle agropastoralists are expected to have improvements to **Critical** phase based on projected average *Gu* 2012 food security outcomes. Additionally, in the Lower Shabelle Riverine, there are carryover food stocks up to July 2012. In spite of a sustained **Very Critical** nutrition phase in most of the South since January 2012, improvements are anticipated following enhanced household food access, humanitarian support, and morbidity levels that are within seasonal norms. For internally displaced persons (IDPs) across the country, the nutrition situation is projected to remain **Critical-Very Critical** except for Hargeisa IDPs who are in a sustained **Serious** phase.

Nutrition surveys conducted across the country in May 2012 using SMART methodology¹⁰, indicate a sustained **Critical-Very Critical** situation for all IDPs, except for those in Hargeisa town who are in a sustained **Serious** phase with global acute malnutrition (GAM, WHZ<-2 or oedema) of **12.0** percent (9.2-15.5). This is attributed to better access to income through increased casual labor wages, and humanitarian support. The Dolo IDPs in the Gedo region with a GAM rate of **25.9** percent based on an exhaustive study, and the Dusamareb IDPs in Central, with preliminary GAM findings of **22.0** percent (19.6%, Pr=90%) are sustained in a **Very Critical** nutrition phase mainly due to challenges to access food, and limited humanitarian support in parts of the settlements. There are improvements for Bossaso and Galkayo IDPs to a **Critical** phase from **Very Critical** in January 2012 following intensive humanitarian support. For Bossaso IDPs the change is of statistical significance. However for Galkayo, the change is not of statistical significance.

Further improvements, based on the April 2012 nutrition surveys, are observed in Mogadishu IDPs, where the situation is currently **Critical**, and in Mogadishu urban areas which are in a **Serious** nutrition phase from a **Very Critical** phase in January 2012. The improvements are attributed to increased access to income from casual labour, food and humanitarian support, including control and management of diseases.

Results from the April-June 2012 surveys are provided in the figures below.

Figure 8: Global (WHZ<-2 or oedema, WHO 2006 GS) and Severe (WHZ<-3 or oedema, WHO 2006 GS) Acute Malnutrition Rates, April-June 2012

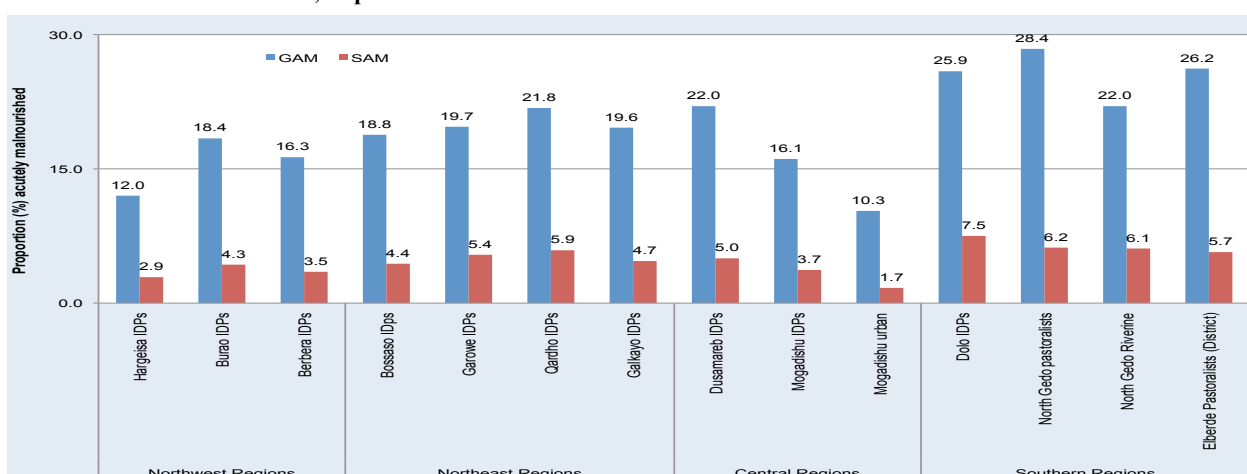


Table 1: UNICEF 2005 classification of mortality. Retrieved June 20, 2012, page 139 of http://www.unicef.org/publications/files/UNICEF_EFH_2005.pdf

CMR (deaths per 10,000 people per day)	Severity of emergency
Up to 0.5	Normal
0.5 to 0.99	Under Control
1 to 1.99	Very Serious
2.0 to 4.99	Out of control
≥5	Catastrophic
The objective of the overall emergency assistance programme should be to achieve a crude mortality rate of less than 1 per 10,000 persons per day and an under-five mortality rate of less than 2 per 10,000 children per day as soon as possible.	

¹⁰ SMART (Standardized Monitoring and Assessment of Relief and Transitions) is an inter-agency initiative, which was launched in 2002 by a network of organizations and humanitarian practitioners including: donors, policymakers, and leading experts in emergency epidemiology and nutrition, food security, early warning systems, and demography. SMART methodology is an improved survey method based on the two most vital, basic public health indicators to assess the severity of a humanitarian crisis: nutritional status of children under-five and mortality rate of the population. These indicators are useful for assessing needs and prioritizing resources, as well as for monitoring the extent to which the relief system is meeting the needs of the population and thus, the overall impact of the relief response. SMART was initiated mainly to improve technical capacity of implementing partners to carry out, analyze, interpret and report on survey findings in a standardized manner to ensure nutrition/health data is reliable. For details, visit <http://www.smartmethodology.org/>

Retrospective crude death rates in the preceding 90 days range from 0.07 among the Galkayo IDPs to 0.49 per 10,000 per day in the North, indicating an **Acceptable** situation based on the UNICEF 2005 classification (Table x). However, in the Mogadishu urban areas and among IDPs, the rates are 1.2 and 1.4 per 10,000 per day, respectively, indicating **Serious** levels, but an improvement since January 2012, when among the IDPs the situation was above the emergency threshold of 2 per 10,000 per day.

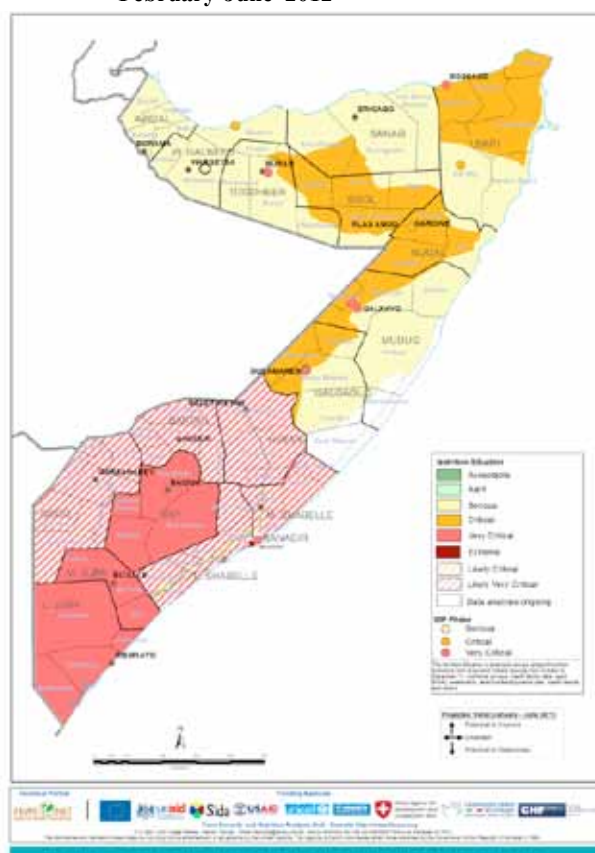
Nutritional surveys targeting rural and urban livelihoods are ongoing in the northern and central regions in June-July 2012. *Additional details will be provided through the FSNAU Nutrition Update scheduled for release at the end of June 2012.*

Health Situation Overview (Excerpt from the Somalia Emergency Health Update, June 9-15, 2012)

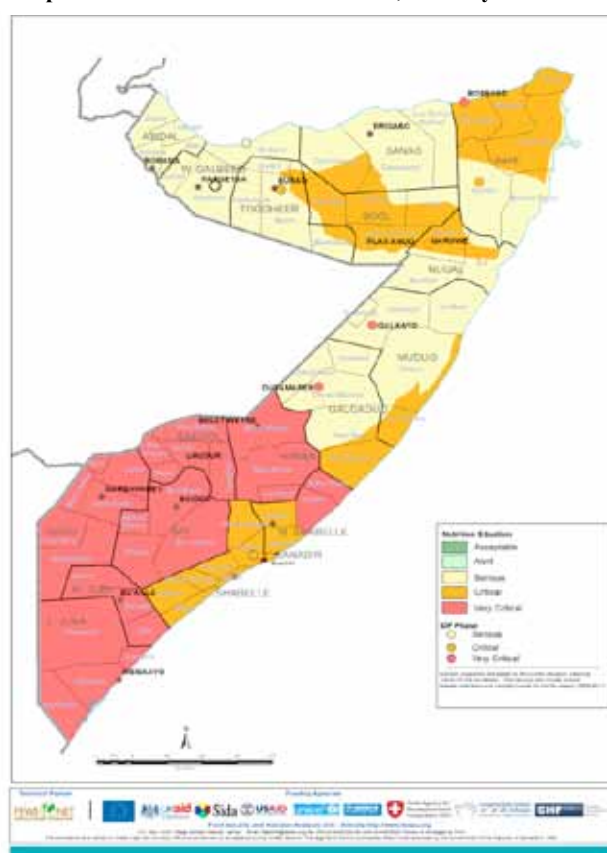
During week 23 (June 9-15, 2012), the leading causes of morbidity across Somalia were **suspected cholera** and **confirmed malaria**. Suspected cholera accounted for most consultations in **Central Somalia** and **Puntland**, Suspected shigellosis was the leading cause of morbidity in Somaliland followed by suspected cholera while **confirmed malaria** was the leading cause of morbidity in **southern Somalia**. Most areas are still receiving rains. Areas most affected by conflict are Lower and Middle Juba, and areas surrounding Mogadishu, including the Afgoye Corridor resulting in a continuous population displacement. However, a reduction in the overall caseload has been observed this week associated with a reported return to stability in most areas that were previously affected by conflict. The number of cases of **suspected shigellosis** is alarming. Current evidence suggests that the characteristics for shigellosis, which is “visible blood in stool”, are not being appropriately diagnosed. While there are no reported deaths from shigellosis, a series of training activities on diagnosing shigellosis will be conducted in collaboration with the Ministry of Health, health partners and local authorities.

For details, contact deslooverep@nbo.emro.who.int, or Dr. Kamran Mashhadi, the health cluster coordinator; mashhadik@nbo.emro.who.int

Map 4: Estimated Nutrition Situation, February-June 2012



Map 5: Estimated Nutrition Situation, January 2012



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

Since January this year, the urban food security situation has been improving steadily in most parts of the country. Humanitarian assistance and favorable food production nationwide during *Deyr* 2011/12 resulted in a continued decline in food prices, positively impacting on cost of living and strengthening the purchasing power of the urban population. The cost of living, measured through the cost of the MEB, fell in most parts of the country at varying levels (Figure 9). In the South, the cost the MEB in the local currency (May '12) declined by 13-25 percent in most regions from December 2011 and by a significant 33 percent in Lower Shabelle. The cost of living is also significantly lower than in May 2011 by 41-52 percent in Bay, Bakool, Shabelles, and Banadir, 33-35 percent in Gedo and Hiran and 10-14 percent in the Juba regions. In the Central region, although decline since January 2012 is small (equivalent to 5-7%), it is 24-25 percent lower than a year ago. In the North SoSh zone¹¹ the cost of living dropped by 15-20 percent but remained stable compared to May of last year. Conversely, the cost of the MEB in the North SiSh zone¹² did not change much, exhibiting an average increase of 3-8 percent in January-May 2012. The cost of living is highest in the North SoSh zone, in the range of 3,753,000-4,487,000 SoSh (equivalent to USD158-181). The lowest cost of living is found in the South, equivalent to SoSh 17,06,000 to SoSh 2,541,000 (equivalent to USD76-116), with Juba and Gedo having the highest cost, SoSh 2,165,000 to SoSh 2,541,000 (USD96-116).

Casual labour wage rates between January and May 2012 maintained relative stability in many markets of the country, but mixed results were also observed in other markets. In the South, labour wages increased marginally (1-9%) in Shabelles, Middle Juba and Bakool while wages remained stable in Banadir and the Bay regions. However, the wages in Hiran and Gedo reduced by 13 percent and 19 percent, respectively, mainly due to the recurrent conflicts and instability, affecting trade and market activities. Highest wage rates were recorded in Gedo (SoSh 154,000), followed by Hiran (SoSh 113,000) and Banadir (SoSh 102,000); this is attributable to the cross-border activities (Gedo) and the enhanced security in Mogadishu, contributing to the increased market and trade activities in the city. However, the lowest wage rates were in Bakool (SoSh 66,000) and Middle Juba (SoSh 67,500), attributable to the general insecurity and relatively lower market activities. In the Central region, wages remained stable at SoSh 85,000-92,000. In the North SoSh zone, the wages rose significantly in Bari (69%) and Nugaal (32%) up to SoSh 135,000 and SoSh 150,000, respectively, as a result of reduced supply of labour in the construction work following increased labour migration to Mogadishu. The stable wage rates are reported in Sanaag (SoSh 120,000) region with slightly falling trends (12%) in Sool (SoSh 100,000) mostly due to periodic insecurity and tensions disrupting the market activities. In the North SiSh zone, wages increased in the range of 7-17 percent in Awdal, mostly due to increased demand for labour from construction companies since February-April.

The decelerating cost of living and the stability in labour wage rates since January 2012 boosted the purchasing power of the urban poor. This is demonstrated by the increase in the terms of trade (ToT) between the daily labour wage and local cereals in most regions, with the highest amount of 16-24 kg of cereals recorded in the Hiran, Banadir, Bay and Gedo in the South and lowest (5-6kg) in Central and North SoSh zone (Figure 10). The difference is primarily due to lower prices of cereals in the producing regions in the South with increased supply of food coming from humanitarian interventions. In the South, ToT increased significantly in most regions, particularly in the Bay region, which has almost doubled. However, the ToT in Shabelles increased only modestly, up to a maximum of 10 percent, which could be a result of the growing tensions and prevailing insecurity in the region. In Central, the ToT (labour/red sorghum) showed stable to moderate decline due to disruption in market and economic activities caused by recurrent conflicts. In the North, the ToT increased in the markets of Bari (33%), Nugaal (50%) and Awdal and W.Galbeed (25-27%) due to reduced sorghum prices and the increased labour wages. Stable to declining trends were recorded in Sanaag and Sool regions, respectively.

¹¹ Sanaag, Sool, Bari, Nugaal and North Mudug regions

¹² Awdal, Waqooyi Galbeed, and Togdheer regions

Figure 9: Cost of MEB by Region May 2012 Compared to Dec 2011 and May 2011

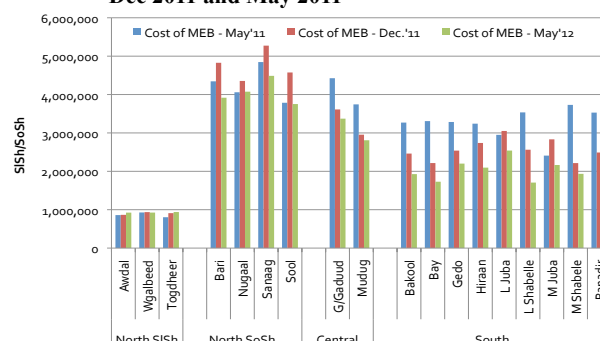
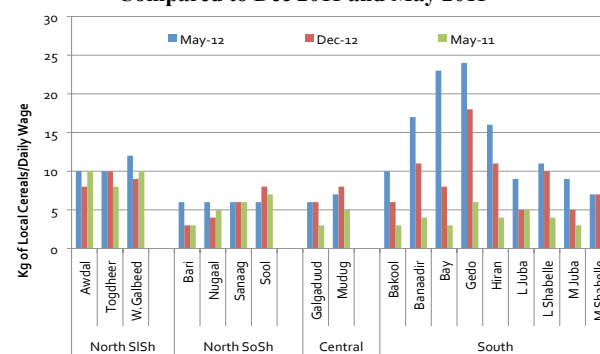


Figure 10: Trends in Terms of Trade by Region May 2012 Compared to Dec 2011 and May 2011



Results from a recent survey in Mogadishu (April '12) has shown an improving food access in the urban and IDP populations compared to a similar study conducted in December last year. The cost of living in the city decreased by 20 percent as a result of continued declining food prices resulting from increased market supply from local production, humanitarian assistance and increased imports of food through the Mogadishu Port. In addition, the growing trade and market activities with the reopening of the main markets, increased flow of remittances¹³, rebuilding of the city and access to humanitarian assistance contributed to the improvement. Consequently, access to skilled labour and remittances and petty trade activities increased among the urban population. The survey results also show significantly increased access to unskilled labour and petty trade among the IDPs. As a result, food consumption¹⁴ in both groups improved between December 2011 and April 2012 although the increase was more significant among the urbanites (from 66% to 95%) than IDPs (from 64% to 72%). The details of the trend analysis will be reflected in the FSNAU and partner report scheduled for release in June 2012.

The trends in urban food security in the country will largely depend on the expected production level of the *Gu* 2012 (August), the level of humanitarian assistance and the security situation. Below average cereal production projected in some parts of the country and likely escalation of conflict in the southern regions could impact the trade flow with and prices of food commodities and may result in further displacements. However, the impact is likely to be mitigated by continued humanitarian support given considerably improved access compared to last year. FSNAU will closely monitor these factors and their impact on the urban food security situation.

RURAL

SOUTHERN REGIONS

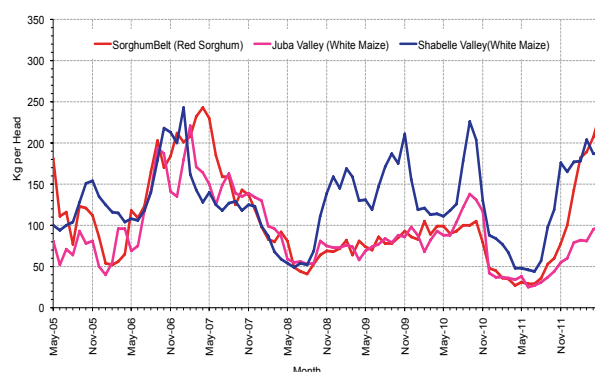
In *Deyr* 2012 an estimated 900,000 people in the South were classified in **Crisis** and in **Emergency**. This was a significant reduction (47%) from the *Gu* 2011 levels following an improved food security situation owing to the effects of favourable last *Deyr* season and multi-sectoral humanitarian interventions. The preliminary results of the assessment suggest below average harvest, particularly in agropastoral areas, which will affect the food security situation.

The cultivated area under cereal in this season was average in all livelihoods, on account of support in terms of quality seeds, tractor-ploughing, canal and water catchment rehabilitation as well as river embankment protection. However, the effects of below normal rains compounded by pest attacks on crop fields (Bay, Bakool, Gedo and parts of Middle and Lower Juba, Hiran and Shabelle) reduced crop establishment and has resulted in several rounds of re-planting. The most affected sorghum crops were in most of the Sorghum Belt regions (Gedo, Bakool, Bay and Hiran), as well as Middle Juba (Sakow/Salagle). However, sorghum outlook in parts of Wanlaweyn (Lower Shabelle) and Jowhar and Balad (Middle Shabelle) and maize in the riverine livelihoods is good. Furthermore, the expected *Hagaya* rains (June-August) are average or above average, and additional cereal will be available in the Juba and Shabelle regions (Figure 11).



Maize Crop Damaged by Stalk Borer. Bullo Burte, Hiran, FSNAU, June 2012

Figure 11: Regional Trends Terms of Trade (Cereal to Goat)



¹³ The number of households with access to remittances doubled (from 12% to 24%) between December 2011 and April 2012 (Mogadishu Urban/IDP survey, April 2012)

¹⁴ The food consumption is measured using "Food consumption score" which is a score calculated using the frequency of consumption of different food groups consumed by a household during the 7 days before the survey

While the better-off and middle class households in the southern regions have enough stocks from the *Deyr* 2011/12 harvest, the poor households' cereal stocks are sufficient only up to June-July 2012 in areas like Bay High Potential, Lower and Middle Shabelle and Hiran riverine, parts of agropastoral areas of Shabelle (Wanlaweyn and Balad) and agropastoral areas of Sakow (Middle Juba). Following the good off-season maize harvest, stocks are estimated to last until end of June in Jilib (Middle Juba) and until July in Jammame (Lower Juba).



Poor Sorghum Crop – Planted 1st dekad of May. Tugar Hoosle Village, Dinsor, Bay, FSNAU, May 2012.

The rangeland resources have improved and water in the communal dams, natural ponds, private water catchments and *berkads* have been fully or partially replenished. However, migration has been reported from the rain-deficit areas into Lower Shabelle and Juba regions. Over the coming months the rangeland condition is expected to improve particularly, along the coast of Shabelle and Juba upon commencement of expected average *Hagaya* rains. Currently, the livestock body condition of all species in the southern regions remain average to above average (PET score 3-4). Calving of cattle in the South is expected during the *Hagaya* period while for camels in the next *Deyr* rainy season. This will improve milk availability in the regions, which is currently below average due to low cattle/camel calving rates in the *Deyr* and *Jilaal* period. Herd growth of small ruminants is observed in most livelihoods since last *Jilaal*. Similarly, an increasing herd size of big ruminants is expected from *Hagaa* season up to next *Deyr* 2012/13.

Cereal prices are exhibiting a declining trend since January 2012, with slight increases in cereal prices being recorded since April mainly in Shabelle, Bay and Gedo. Underperformance of crops in agropastoral areas affected farm labour opportunities, resulting in reduced labour wage rates. For instance, in the Bay region, the daily labour wage rate for May 2012 shows a decrease of 12% compared to the preceding month and 31 percent compared to December 2011. In the Shabelle agro-pastoral area, however, the labour wage rate showed an increasing trend and the same is observed in the riverine areas, owing to the significant cash crop and subsistence activities in the area. Nevertheless, the ToT labour wages to cereals showed further improvements since December 2011 on account of reducing cereal prices. Currently, ToT is significantly higher compared to the lowest levels a year ago, particularly in Bay (23kg/labour wage) and Gedo regions (21kg/labour wage).

Livestock prices increased in most markets of the South owing to increased market demand (local, export and re-stocking), improved livestock body condition and limited supply due to the effects of previous drought. The local goat prices were considerably higher in May 2012 compared to their levels a year ago (Shabelle regions - 31-36%; Juba 31-38%; Hiran - 84%; Gedo - 82%, Bakool - 130% and Bay - 196%). Also, the local quality goat prices slightly or moderately higher than their levels in December 2011 in Shabelle (9%), Juba (9%), Bay (29%), Bakool (23%), Hiran (16%) and Gedo (21%). Similarly, the yearly trend is observed for local quality cattle prices across the southern regions, which were largely stable or increased slightly in the current year. Increases in the ToT local quality goat/cereals are observed across the regions in the South. Similarly, the yearly comparison indicates a significant improvement with an increasing trend as shown in table 2 below.

Table 2: ToT Local Quality Goat to Cereal – Kg/Head

Region	May 2012	December 2011	May 2011
Red Sorghum			
Bay	468	131	27
Bakool	213	92	24
Gedo	173	89	31
White Sorghum			
Hiran	207	109	30
White Maize			
Shabelle	202	176	53
Juba	99	60	38

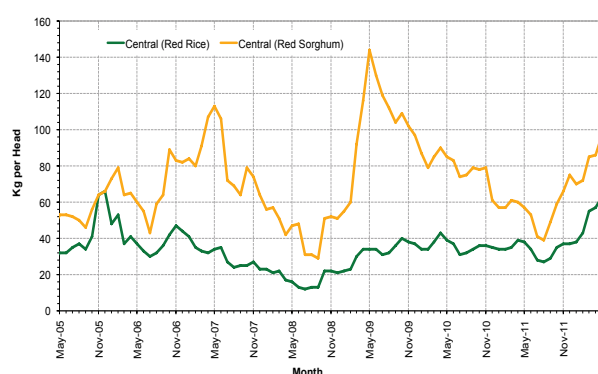
CENTRAL REGIONS

In the post- *Deyr* 2011/12 the food security situation improved in all livelihoods primarily due to the positive impacts of the *Deyr* season. However, an estimated 150,000 people in rural areas were still classified in **Crisis** and **Emergency** phases on account of the lingering effects of the previous poor seasonal performance. *Gu* 2012 rains fairly improved the pasture and water conditions, easing the acute water shortage and water trucking in parts of Hawd and Addun. However, migration from the rain-deficit livelihoods of Coastal *Deeh*, pockets of Addun and the Cowpea Belt towards Hawd where average pasture is reported, which may lead to overgrazing. Average livestock body condition (PET score 3-4) is reported in all the livelihoods. However, lactating animals' body condition for all species is expected to deteriorate in the Coastal *Deeh* and parts of Addun. Low to medium kidding/lambing for sheep and goat and low calving for camel is observed in all the livelihoods. Over the coming six months, low kidding/lambing is expected owing to the currently observed low conception rates in all the species. Low camel milk production is reported on account of the low calving rates observed in the last *Deyr* season. Ensuing is an increase (13%) of camel milk prices in May 2012 compared to December 2011 and a 23 percent decline compared to same time last year. In this *Gu*, the cowpea production is expected to be below average following the previous dry spell, poor seasonal performance and insect infestation. This poses a challenge to the poor households in the Cowpea Belt whose stocks were depleted during the *Jilaal* period, and are currently dependent on market purchases (cash or credit) and gifts for their food needs (Figure 12).



Migration from south Wisil to Herodhagahley, *Gu* outlook, June 12, Hoby,.

Figure 12: Regional Trends Terms of Trade (Cereal to Goat)



In May 2012, the local goat prices increased by 22-36 percent in all the livelihoods compared to their levels in December 2011. This is attributable to the average livestock body condition, reduced supply because of limited livestock holding amongst the poor in all livelihoods and increased demand in view of the on-going live animal stocking by traders in anticipation for the coming *Ramadan* (July-August). In January-May 2012, rice and red sorghum prices continued to decline (25% and 3%, respectively) because of increased supply of local cereal from *Deyr* and off-season harvests in the South, increased imports from the Mogadishu Port, appreciation of the Somali Shilling which made the imports cheaper, and the cumulative effects of the ongoing humanitarian support. An annual comparison indicates decreased cereal prices in Central (rice-30% and red sorghum-33%). ToT between local quality goat and rice significantly improved in the central regions' markets in January-May 2012 largely due to increased goat prices and reduced rice prices (Figure 12). However, in the volatile areas such as Dhusamareb, ToT increase was relatively lower (30%) due to disruptions in market supplies. An annual comparison shows a 66 percent increase in the ToT owing to the reduction in rice prices and an increase in the livestock prices in all markets of Central (Table 3).

Table 3: ToT Local Quality Goat to Red Sorghum - Kg/Head

Region	ToT Local Quality Goat to Rice - Kg/Head		
	May 2012	December 2011	May 2011
South Mudug	115	92	70
Galgadud	87	63	48
Region	ToT Local Quality Goat to Rice - Kg/Head		
	May 2012	December 2011	May 2011
South Mudug	83	39	33
Galgadud	53	36	37

NORTHERN REGIONS

In post-*Deyr* 2011/12, an estimated 140,000 people, were identified in acute food insecurity phases of **Crisis** and **Emergency**, indicating an improvement from the situation in the preceding season (*Gu* 2011). The *Gu* 2012 performance was average in most areas, which resulted in improved pasture and water conditions, leading to cessation of water-trucking in the rain deficit livelihoods of Nugal, parts of Sool Plateau and parts of Golis livelihoods ceased. Exceptions are Guban of Awdal and Waqooyi Galbeed where *Hays* rains (Dec-Feb)¹⁵ completely failed for a third season in a row. Therefore, a large outmigration of livestock from this livelihood to nearby Golis mountains is reported. Additionally, *Gu* rains were also poor in Coastal *Deeh* of Iskushuban and Allula and pockets of Sool, Nugal and Golis of Sanaag region. Apart from Guban, in all the other livelihoods normal opportunistic livestock migration is reported following significant improvements in the rangeland conditions. Livestock body condition is average to above average in most of the livelihoods (PET score 4), except for the Guban livelihoods (PET score 2). Low to medium kidding of goats, medium to high lambing of sheep and camel calving (started in June) was reported in most of the livelihoods.

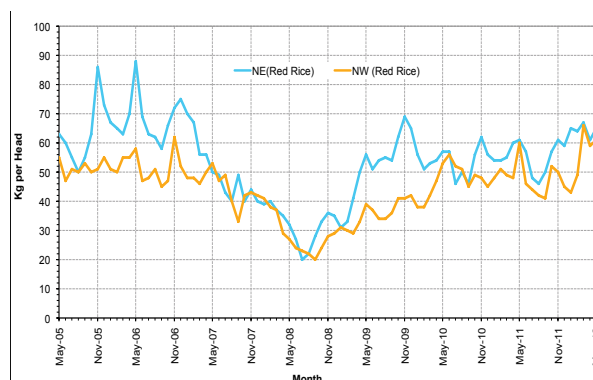


Average browse and goat body condition, Hawd, Togdher region, FSNAU, May 2012

Camel calving is expected to continue up until July 2012. Camel milk production is currently low due to low calving in *Deyr* 2011/12, while goat milk is average with exception of some areas where medium kidding occurred during the *Jilaal* period. However, camel milk availability is expected to increase over the coming three months (from June onwards) in Hawd, Addun, Golis and Karkaar/Dharoor. In May 2012, the price of camel milk increased (11-14%), indicating limited supply.

Following the prevailing good livestock body condition and increased demand for livestock for *Ramadan*, prices of local goats showed an increase in the Northwest (29%) and the Northeast (13%) in January-May 2012 period. The annual comparison indicates a moderate increase in the Northwest (12%) and marginal in the Northeast (5%) due to the higher demand for livestock in the Northwest markets to feed the Berbera port. The price of red and white sorghum has declined by 10-15 percent in northern markets. The same trend was observed in the price of rice in the Northwest, while in the Northeast rice price were relatively stable (3%). As a result, favorable ToT between cereals and local quality goat are recorded in the North (65-76kg of rice /head, (65-108 kg of sorghum/head) representing about a month of cereal supply for a pastoral family. However, in the coastal livelihood of Iskushuban, Bandar-Beyla and Allula, the purchasing power of the populations is lower (53kg/head) than in the inland markets. Other economic activities in this season included fishing and frankincense production (Figure 13).

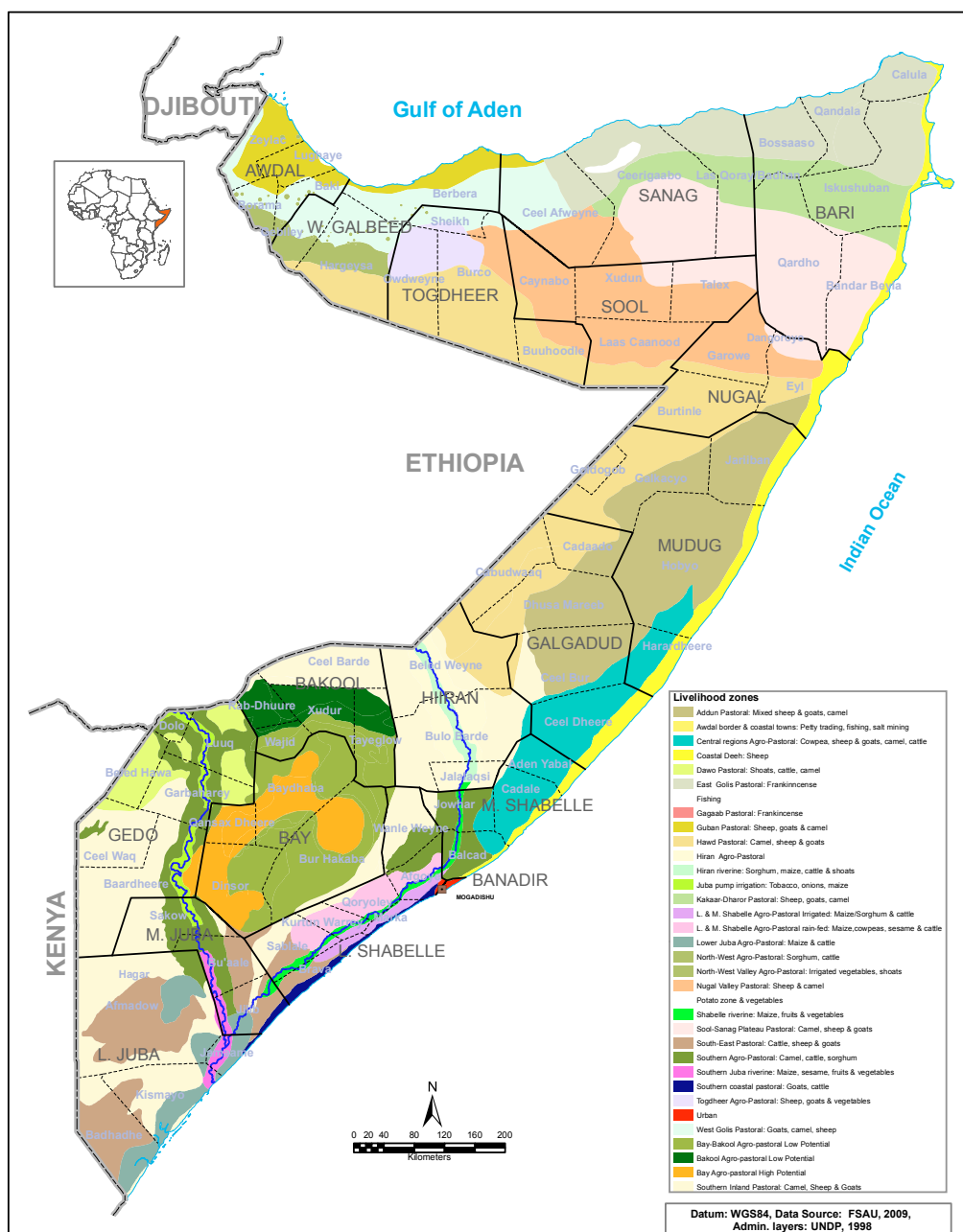
Figure 13: Regional Trends Terms of Trade (Cereal to Goat)



Frankincense production improved following the average rains in East Golis of Bari region while the fishing activities declined. This was because of the seasonal sea closure (high monsoon period) significantly impacting the fishing activities as it coincided with the resumption of fish trade between Somalia and the main Yemen market that had been disrupted by insecurity from January-April 2012. The next seasonal fishing peak period will be from October 2012 and will last up to February 2013.

¹⁵ This is the only rainy season in this livelihood

SOMALIA LIVELIHOOD ZONES



Recent and forthcoming publications and releases

FSNAU May-June Nutrition Update, June 2012 (Forthcoming)

FSNAU May Climate Data Update, June 2012

FSNAU May Market Data Update, June 2012

FSNAU Garowe Urban Baseline Report, May 2012

FSNAU Technical Series Report Post Deyr 2011/12 Nutrition Situation, March 2012

FSNAU Technical Series Report, Post Deyr 2011/12 Analysis, March 2012

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

Technical and
Managerial Support



Funding Agencies

