

## KEY ISSUES

Based on ongoing monitoring activities in addition to the results of the Food Security Analysis Unit (FSNAU) rapid preliminary *Gu* season field assessment (June 2015), FSNAU projects a short-term deterioration of food security conditions in parts of agricultural livelihoods of Somalia in the post-*Gu* period (July-December 2015). The deterioration is likely due to below average harvest outlook, although the anticipated shortfall in domestic cereal production could be partially mitigated by planned humanitarian food and social safety net interventions in the South, based on the Somalia Food Security Cluster information. On the other hand, the food security situation is likely to improve in livestock-dependent livelihoods as a result of anticipated improvement in livestock herd size and favourable livestock prices as well as increased milk availability. However, there are some concern areas in parts of the country where erratic *Gu* rainfall may impact livestock conditions during the dry *Hagaa* season. Nevertheless, the situation is expected to improve with the start of *Deyr* rains in October, which are projected to be good based on very preliminary forecast. Food security crisis situation is likely to sustain in the towns of Bakool and Hiran regions, which have been experiencing trade blockade over the past one year. Critical levels of global acute malnutrition (GAM) [ $\geq 15\%$ ] were observed in five out of 13 surveyed (May 2015) settlements of Internally Displaced Persons (IDPs).

- Overall, cereal harvest in southern Somalia is expected to be below average. This shortfall is attributed to floods (April) in riverine areas of Middle Shabelle and moisture stress in most agropastoral areas, caused by early cessation of *Gu* rains. Off-season harvests expected in September in flood-affected Middle Shabelle and riverine areas of Juba and Gedo regions will partially offset the *Gu* cereal harvest losses. In the agropastoral livelihood of the Northwest, the *Gu* harvest (July 2015) is expected to be below average to poor. However, this livelihood normally receives its main *Gu-Karan* harvest in October-November. Considering that *Karan* rains (July-August) are projected to be near normal to below normal, an overall *Gu-Karan* harvest in the Northwest is likely to be below normal.

- Livestock conditions have improved in most pastoral and agropastoral areas of the country. However, there are some rain-deficit areas in parts of the regions of Bari, Sanag and Awdal in the North, Gedo (Garbaharey and Beledhawa districts) in the South and Galgaduud (Adado district) in Central that do not expect any rains until October. Therefore, these areas are likely to experience pasture and water shortages over the course of the *Hagaa* dry season (July-September 2015). In most pastoral/ agropastoral areas, livestock (camel, cattle and goats) holding of poor households is expected to reach near baseline to above baseline levels apart from a few areas in Central (Cowpea Belt and Coastal *Deeh* livelihoods) and North (Coastal *Deeh* livelihood), where it is likely to remain below baseline levels. Milk availability is expected to improve in most parts of the country over the next six months. This along with anticipated favourable livestock prices will have a positive impact on food access of pastoralists/ agropastoralists in most areas.

- The inflation rate measured through Consumer Prices Index (CPI) has decreased (5-9%) over the past one year in most parts of the country due to declines in prices of food commodities included in the basket. This trend contributed to increased/ stable urban household's purchasing power in the same period in most regions. However, in urban areas of Bakool and Hiran regions that have been experiencing trade blockade for more than one year, the prices of food commodities remain high, particularly in Hiran region. In Buldo Burto (Hiran) town, cereal and other food commodity prices have increased further since January this year. The prevalence of global malnutrition in Buldo Burto is Very Critical (25%) and Critical (16%) in Hudur town of Bakool Region based on FSNAU nutrition assessment conducted in June, although it has slightly decreased since the previous assessment (April) owing to recent humanitarian interventions. On the other hand, in siege-affected towns of Hudur and Wajid (Bakool), prices of cereals have declined since the beginning of the year; compared to a year ago prices of all major food commodities are significantly reduced in Hudur as a result of humanitarian interventions carried out through air lifting in the past few months as well as alternative food supply routes available to this town.

- Recent FSNAU surveys show deterioration in nutrition situation from six months ago in the assessed IDP settlements in Kismayo and Dhobley, while improvement was noted among Bossaso IDPs in the North. Critical levels of GAM rate ( $\geq 15\%$ ) were observed among IDPs in Dhobley, Baidoa and Dolow in South-Central regions and Garowe and Galkayo in the Northeast.

Climate

Markets

Nutrition

Agriculture

Livestock

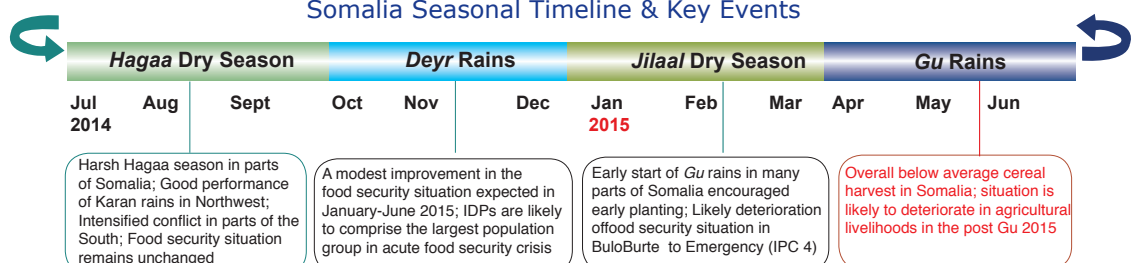
Civil  
Insecurity

Emerging  
Regional  
Issues

FSNAU - Somalia

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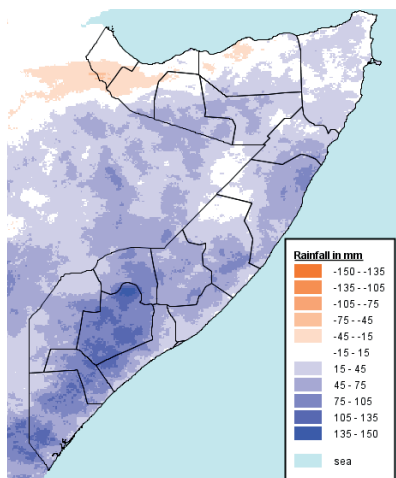
### Somalia Seasonal Timeline & Key Events



## SECTOR HIGHLIGHTS

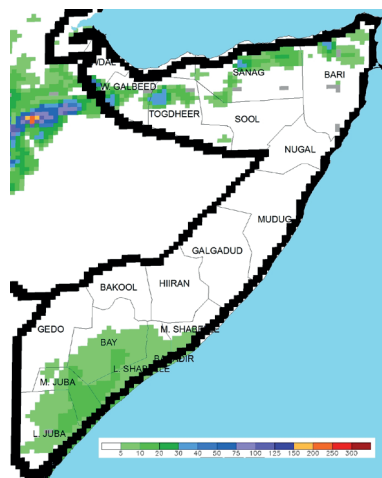
### CLIMATE

Map 1: March Dekad 1- June Dekad 1 2015 TAMSAT RFE Rainfall Difference from Normal



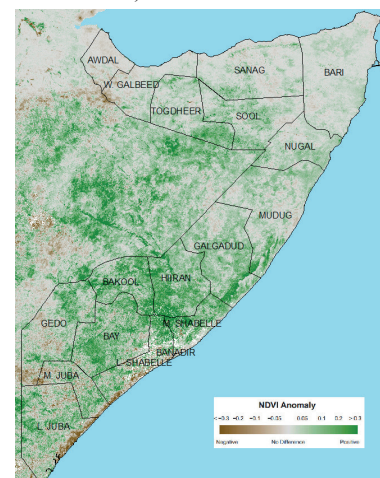
SOURCE: JRC & TAMSAT

Map 2: Rainfall Forecast Valid up to June 30, 2015



SOURCE: NOAA

Map 3: NDVI E-MODIS Anomaly June 1-10, 2015



SOURCE: USGS

### Rainfall Performance

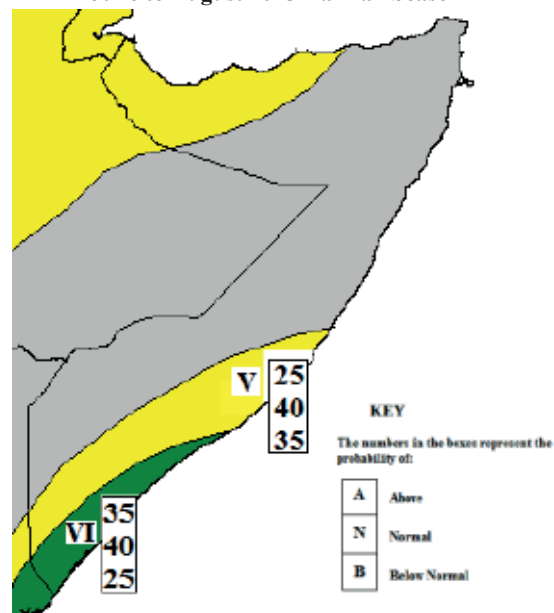
The 39th Climate Outlook Forum (COF) for the Greater Horn of Africa (23-25 February 2015) indicated an increased likelihood of near normal to below normal long rains (*Gu*) with delayed onset and erratic distribution; exceptions were most parts of North and some parts of Lower Juba with a projection of near average to above average rainfall. However, rains started during the third dekad of March, i.e. earlier than normal in most parts of the country. The April-to-June (*Gu*) rainy season had near normal to above normal performance in intensity, coverage and cumulative totals but poor in temporal distribution across the country. The areas with generally poor rains during this period included agropastoral areas and Guban Pastoral of the Northwest parts of Hawd of Togdheer, East Golis of Sanag and Northern Inland Pastoral (NIP) of Sanaag and Bari, Coastal Deeh of Bari and the South, as well as Hiran, Gedo, Middle and Lower Juba regions (Map 1).

In the first dekad of May, moderate to good rains precipitated in most regions of the country. However, between the second dekad of May and early June, which normally is the peak of the rainfall season and also essential for crop and pasture development, most of South-Central and some parts of Northeast regions (Nugal and parts of Bari) largely received little or no rain. On the other hand, most of Awdal, Woqoyi Galbeed and parts of Bari, Sanag, Sool and Togdheer regions received moderate to light rains between May and the first dekad of June with near average distribution. The second dekad of June was dry according to field reports thereby indicating early cessation of *Gu* rains. *Hagaa* showers are expected to follow as from June. The Global Forecast System (GFS) rainfall forecast valid to June 30th projected dry conditions except parts of Bay, Juba and Lower Shabelle regions and pockets in East Golis of Bari and Sanaag, which will likely receive 5-10mm rains (Map 2).

### Vegetation conditions

Satellite-derived Normalized Difference Vegetation Index (NDVI) derived from the E-Modis show a general improvement of vegetation in key pastoral and agropastoral livelihood zones, which is attributed to effective *Gu* rains. However, negative change is evident in West-Golis and parts of agropastoral of Northwest, which is also replicated in coastal areas of Lower Shabelle and the Jubas, as well as in the Southern Inland Pastoral (SIP) livelihood of Bardhere (Gedo) and the surrounding small pockets of Gedo region (Map 3).

Map 4: GHACOF Consensus Climate Outlook for the June to August 2015 Rainfall Season



### Climate Outlook for Coming Hagaa and Karan rains

Karan (July-August) and *Hagaa* (June-July) rains represent important rainfall seasons for the northwestern sector and the southeastern parts of Somalia, respectively. The 40th Greater Horn of Africa Climate Outlook Forum (25th to 26th May 2015) organized jointly by IGAD Climate Prediction and Application Centre (ICPAC), The World Meteorological Organization (WMO) and the National Meteorological and Hydrological Services of ICPAC countries, generally concluded increased likelihood of near normal to below normal rainfall over much of the Northwest Somalia and parts of Bay, Juba and Shabelle regions. There is an increased likelihood of near normal to above normal rainfall over the coastal areas of Juba and Lower Shabelle. For the rest of the country, June to September period is a dry season (Map 4).

Consensus is growing among the world's weather watchers indicating an *El-Nino* event, which in the case for Somalia may result in good *Deyr* rains. However, more accurate prediction is not possible at this stage.

## CIVIL INSECURITY

In the period between January and May 2015, incidences of insecurity such as direct killing, suicide bomb explosions, land mines and armed confrontations, continued in the southern regions, mostly in Mogadishu, Baidoa, Beletweyne and Kismayo. Localised incidences of similar magnitude and intentions were also reported Bossaso of Bari region where several prominent individuals were killed. These attacks were mostly purported and claimed by insurgents. Federal government and regional administrations such as Southwest states (Baidoa), Jubaland states (Kismayo) remain in control of the major commercial and administrative towns in the South except Middle Juba region, which is fully controlled by the insurgents.

Clan-based conflicts occurred only in Hiran (Defow village near Beledweyne) over agricultural land disputes leading to internal displacements to Beletweyne town. In another related incidence in Guriceel (Galgadud region), clashes occurred over water well disputes along the Ethiopia-Somalia border between nomadic communities and Ethiopian paramilitary forces (Liyu police) [Source: *Radio Mogadishu website, Mogadishu, in Somali on 1 Jun 15- BBC Mon AF1 AFEauwaf 020615*].

According to the United Nations High Commissioner for Refugees (UNHCR), between 22 May and 4 June, a total of nine boats carrying about 4 000 refugees from Yemen arrived to northern ports of Bossaso and Berbera. Some of these refugees have moved to the South, mostly to Mogadishu-city, with the assistance from UNHCR and partners. The total number of arrivals to Somalia since the onset of the crisis up to now (from 27 March up to 9 June) is 14 457 individuals, the majority of which (13 299) are Somali nationals (Source: *Yemen situation UNHCR Regional Updates #8 and #9, June, 2015*).

According to UNHCR, as at June 2015 there were 1 106 751 IDPs, 9 440 non-Somali asylum-seekers and 2 926 non-Somali refugees within Somalia. Based on the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) May 2015 update, over 16 000 people have been displaced by floods in April-May, of which 13 500 people in Lower and Middle Shabelle regions, 2 700 people in Galkayo (Mudug region) and 120 in Bay. In the first quarter of the year, about 40 000 people were forcibly evicted in Mogadishu. Most of the estimated 369 000 IDPs in Mogadishu reside in over 400 spontaneous settlements and public buildings.

Humanitarian access remains constrained in southern and central regions of Somalia. Road blockages remain the biggest access challenge in parts of Bakool, Bay and Hiraa regions (Source: *OCHA, Humanitarian Bulletin Somalia, April 2015 | Issued on 25 May 2015*).

## AGRICULTURE

### Planting and harvest outlook

Based on the FSNAU *Gu* preliminary assessment results (May 2015), the area planted under cereals (sorghum and maize) varied from below average to average in most of the southern regions compared to the Long-Term Mean (LTM) of 1995-2014 due to early cessation of rainfall, significant flood damage to standing crops, Pest infestation and bird attacks. However, in most areas in the South, the cereal harvest will be collected gradually, between June and July 2015, due to intermittent planting owing to the impact of uneven rainfall.



In Lower Shabelle, the *Gu* cereal harvest is expected to be near average owing to average rains that started on earlier than normal (3rd dekad of March). Good crop conditions are reported in agropastoral areas of Wanlaweyne and riverine areas of Afgoye, Qoryoley, Kurtunwarey, Sablale, and some parts of Marka. The exceptions are coastal areas of Lower Shabelle (Marka and Barawe districts), where maize production is likely to be compromised due to light and late rains, which delayed planting activities and impeded early crop growth, limiting potential crop yields. *Hagaa* rains, which are projected to be near normal to above normal, may improve the situation in this livelihood as well as in Lower Juba. In Bay region, which is a major sorghum producer, the current *Gu* 2015 crop production indicates that more maize is planted than sorghum in most districts due to farmer's fear of bird attack on their crops. In some areas of the region (Baidoa and Dinsor districts), the crop establishment was delayed by heavy rains and pests during planting. Nevertheless, preliminary crop assessment indicates that this season's cereal production is likely to be near average in the region and higher compared to *Gu* 2014. The agropastoral livelihood zones of Hiran, Middle Juba, Lower Juba and Gedo have experienced moisture stress, which may reduce cereal harvests in these locations. Thus, in Hiran, Middle Juba and Lower Juba regions harvest is likely to be below average, while near average harvests are expected in Gedo and Bakool.



Flooded Sesame Farm in Jowhar; M. Shabelle, FSNAU, 2015

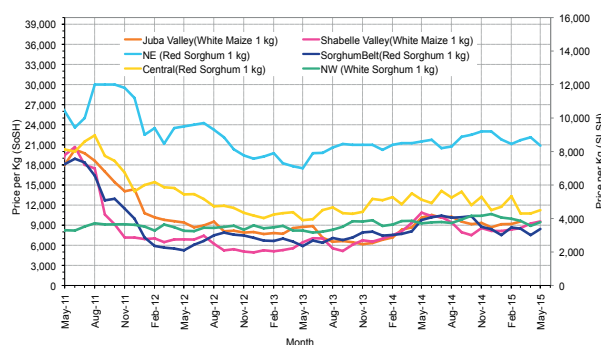
The crop production is expected to be below average in riverine areas of Middle Shabelle due to significant damage to standing crops caused by floods, although overall production of region is expected to recover partially after recessionary cultivation in flooded areas. For example, the recent floods (2<sup>nd</sup> dekad April) in Mahaday areas have destroyed standing crops (1600 – 1700 ha) and damaged agricultural infrastructure (canals and culverts). Similarly, limited floods occurred in Jowhar riverine in the 2<sup>nd</sup> and 3<sup>rd</sup> dekads of April have affected about 5 000 ha of crops. The floods were exacerbated by weak river embankments and artificial river breakages, especially in the lower reaches of the Shabelle River. Flash floods have also devastated some established crops (maize and red sorghum) in Southern Agropastoral (SAP) of Lower Shabelle region, particularly in the northeastern parts of Wanlaweyne and Sablale zones. The magnitude of the damages to crops caused by flash floods is estimated at 2 000 to 2 500 ha of cereals (70% maize and 30% sorghum) in Wanlaweyne alone. Likewise, 500 to 700 ha of standing maize were destroyed by similar events in Sablale district. However, these areas are likely to harvest in early August 2015 after replanting of maize and cash crops in flooded lands. The off-season cereal harvest will contribute to improved cereal availability in some regions such as Lower Juba, Middle Juba, Middle Shabelle and Gedo. In the major cereal producing regions of Shabelle and Bay the cereal stocks are expected to extend at least up to the next season. On the other hand, in the Northwest Agropastoral, the *Gu* 2015 cereal (yellow maize and white sorghum) production is expected to be below average to poor due to poor *Gu* rains, although the *Karan* harvest, the major harvest of the region collected in October-November, will depend on the performance of *Karan* rains, which is projected to be near average to below average. Conversely, in the Cowpea Belt of Central an average cowpea production is expected due to average rainfall.

### Cereal Prices

The *Gu* and off-season cereal harvest (Lower Juba, Middle Juba, Gedo and Middle Shabelle) outlook suggests that cereal prices are likely to fall in most regions of southern Somalia once the harvested cereals start entering the markets (July-August). However, given that harvest is going to be collected intermittently and be below average, the decline in prices is likely not be significant. Nevertheless, the cereal prices in the coming months is likely to follow a seasonal pattern although the price behavior will also be determined by the flow of relief food as well as security situation in Somalia.

Between January and May 2015, maize prices increased in the riverine markets of Shabelle (18 %) and Juba (9%). In May 2015, the lowest maize prices (7 125-7 375 SoSh/ kg) were recorded in the main producing districts of Lower Shabelle and Lower Juba (Qoryoley and Jamame), while the highest prices were noted in Wanlaweyne (9 330 SoSh/kg) of Lower Shabelle region. On the other hand, sorghum price have also increased in Bakool (16%), Bay (9%), and Gedo (9%) while they remained stable in Hiran compared to January 2015. In the Northwest, sorghum prices have mostly remained stable in Awdal and Togdheer regions. However, the prices have decreased at mild rates in W.Galbeed due to ample supply from Ethiopian border.

Figure 1: Monthly Trends in Local Cereal Prices



Year-on-year comparisons show lower maize prices in Lower Shabelle (16%) and Middle Shabelle (10%), while the prices have climbed across the Juba regions (Middle Juba - 10% and Lower Juba - 5%) due to below normal to poor *Deyr* 2014/15 harvest in these two regions. The sorghum prices showed mixed trend in the Sorghum Belt regions in May 2015 compared to a year earlier. The prices are lower in Bakool (22%), Hiran (21%) and Gedo (11%) likely due to an anticipation of better *Gu* 2015 harvest compared to the last *Gu* season and increased supplies from Bay and Ethiopian border. However, in the main producing region of Bay, the price has increased by about 10 percent due to increased demand. White sorghum prices in the Northwest (Hargeisa) are lower than a year ago as farmers have released sorghum stocks to markets to cover the costs of *Gu* seasonal cultivation while new supplies of sorghum also came from southern Somalia (Hiran region) and Ethiopia (Figure 1).

## LIVESTOCK

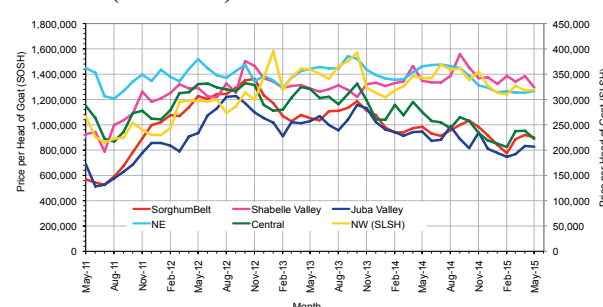
### Pasture, Water, Migration and livestock Conditions

The pasture, browse and water conditions have improved during *Gu* 2015 rainy season in most pastoral areas and in parts of agropastoral in the North. However, as a result of poor *Gu* rains, pasture and water conditions vary from below average to poor in the regions of Bari (Coastal *Deeh* and NIP livelihoods), Sanaag (East Golis and NIP), Toghdheer (parts of the Hawd/Golis Pastoral and agropastoral areas), Awdal (Guban livelihood) and Wooki Galbeed (parts of agropastoral in Gabiley and Hargeisa) where p. Similarly, in the South-Central regions, *Gu* rains were below average in parts of Gedo (SIP of Garbaharey and Dawa in Beledhawa), along the coast of Juba/ Shabelle regions and parts of Addun in Adado districts in Central regions. As a result, pasture and water depletion is likely to occur in these areas over the course of the *Hagaa* dry season (July-September 2015). However, expected *Hagaa* (June-July) and *Karan* (July-August) rains may alleviate projected pasture and water shortages in the rain-deficit areas along the coast in the South (*Hagaa*), as well as in the agropastoral of Gabiley and the Guban of Awdal (*Karan*). Livestock migration is normal for most parts of the country; however, field reports indicated an abnormal livestock migration to the Sool and Nugal regions from parts of the NIP livelihood in the Bari region, from Guban to Golis of Awdal region. Likewise, agropastoralists from Gabiley moved to Hawd of Hargeisa and Golis of Awdal region. In most of the pastoral and agropastoral livelihood zones across the country, livestock body conditions improved to average to above average levels, which is equivalent to a PET score of 3 and 4. Exceptions are the above-mentioned rain deficit areas, particularly Guban, agropastoral and NIP livelihood of Erigavo where the body conditions of livestock both camel and small ruminants are below average (PET 2). Medium kidding/lambing of goats/ sheep and low to medium calving of cattle (in March/April) and camel (as from June) is reported across the country. Consequently, milk availability is expected to be near normal to above normal in most areas over the next six months, with the exception of the rain-deficit zones mentioned above. Camel holding amongst the poor pastoralists is projected to be at baseline or above baseline levels by the end of June 2015 with the exception of Coastal *Deeh* (Central and North), where it is likely to remain below baseline levels. Herd size of small ruminants and cattle in agropastoral/pastoral areas are expected to vary from near baseline to baseline levels, except the Cowpea Belt of Central and Coastal *Deeh* of north and central, which are far below baseline levels.

### Livestock Prices and Exports

Livestock prices for all species showed mild increases or stable rates in the first five months of the current year (January-May 2015) in most markets. However, significant gains in value of big ruminants were recorded in Hargeisa (21% for camel) and Borama (31% for cattle) due to less supply following a migration of big ruminants towards hinterland (Hawd of Hargeisa along the border of Ethiopia) as well as difficult movement within Borama due to insecurity. Annual comparisons indicate declines in local quality goat price, with the largest drop (19 percent) recorded in the Ishkushuban district of Bari region due to oversupply of livestock that migrated towards Iskushuban town as a result of good rains, while demand is low considering that it is an isolated market, far from a tarmac road. Similarly, big

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



*Average Body Condition. Agropastoral, Afgoye, Lower Shabelle region, FSNAU, March 2015*

ruminants have also lost value from a year ago, most significantly in Aden Yabal (33% for cattle) and Luuq (35% for camel) due to oversupply as result of less livestock migration because of insecurity (Aden Yabal) as well as good rains received in the districts at the beginning of the season (March- April 2015). Local quality goat prices remain stable or exceed the five-year average levels in most regions (Figure 2).

In the first quarter of the year (January-March 2015), approximately 972 955 heads of livestock were exported through Berbera (64%) and Bossaso ports (36%). This figure is higher (by 17%) compared to the same period of last year (830 705 heads). Between January–May 2015, about 622 184 heads were exported through Bossaso port, which significantly exceeds (38%) the exports in the corresponding period of last year (451 006 heads).

## MARKETS AND TRADE

### Exchange Rate Trends

The Somali shilling (SoSh) remained largely stable in many parts of the SoSh-using areas during January-May 2015 period. However, over the past year, the SoSh made a modest depreciation (12%) in Banadir region to trade at around 22 500 SoSh per the United States dollar (USD) in May. This is due to recent entry of fake notes in the Banadir markets and the reduced dollar supply related to closure/ restriction of money transfer companies. The Somaliland shilling (SlSh) exchange has depreciated by four percent against the USD since the beginning of the current year, due to uncertainties caused by Yemen conflict and reduced remittances. Over the past year, the SlSh rate is also devalued (by 7%) across most markets of the SlSh-using areas.

### Cereal Imports and Commodity Price Trends

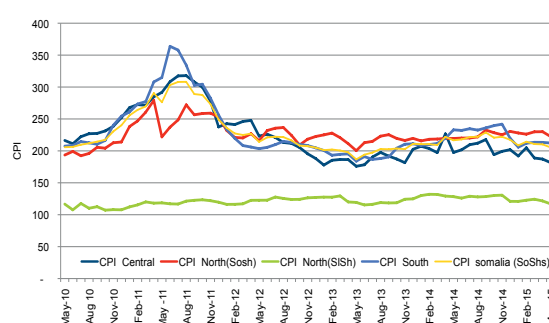
The average prices of most essential imported commodities such as rice, wheat flour, diesel, fuel and sugar and vegetable oil were seasonably stable across most reference markets in January-May 2015. This is attributed to favourable prices in the international source markets and improved port operations ensuring increased food imports for pre-stocking to counteract the monsoon windy season off the Indian coast. Exceptions are markets in hinterland, away from main road routes, where seasonal rains curtailed commodity movement leading to slight to moderate increases in food prices. The highest price increases were observed in Bakool region (11-32%), also exacerbated by continued trade blockades by insurgents in some districts of the region. The average annual price changes from May 2014 indicate overall stability or modest decline in most markets in the country. The price of diesel in the northeast regions has gone up by eight percent when compared to January this year because of the Yemen conflict, as fuel exports from Yemen were cheaper for this region due to close proximity.

January to May 2015 cross border exports of sorghum and maize from Ethiopia to central and northern Somalia increased to 2 229 tonnes or by 15 percent compared to the same period last year due to relative improvement in security conditions along the trade routes connecting the countries, which facilitated trade movements. Similarly, re-exports of rice, sugar and wheat flour from Somalia to Ethiopia and Kenya increased by 17 percent for similar reason above.

### Consumer Price Index

CPI, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), indicates stability in the cost of living in urban areas of the country over the past five months (Figure 3). The CPI is however modestly decreased (5-9%) over the May 2014-May 2015 period in most parts of the country due to the overall decline in price of food commodities in the basket following relatively ample supply of cereals resulting from two consecutive seasons of average domestic cereal production and decreasing prices of imported items in the international source markets.

Figure 3: Consumer Price Index





## NUTRITION SITUATION

FSNAU and partners conducted joint Nutrition and Food security assessments among different IDP settlement across Somalia. A total of 8 824 children (6-59 months) from 5 697 households were covered. Acute malnutrition in children 6-59 months is a direct outcome indicator of recent changes in nutritional status. Figure xx shows the summary of nutrition situation in *Gu* 2015 among 13 IDP settlements across Somalia. Since *Deyr* 2014/15, deterioration in nutrition situation is noted among IDPs in Kismayo and Dhobley in South-Central (SC) region while significant improvement was seen among Bossaso IDPs in North East (NE) region. **Critical** levels of GAM rate ( $\geq 15\%$ ) were observed among five IDPs out of 13 surveyed during *Gu* 2015 assessment. These are Dhobley, Baidoa and Dolow IDPs in South-Central regions and Garowe and Galkayo in Northeast region. It is of concern that nutrition situation in 3 of these IDPs (Dolow, Garowe & Galkayo) is sustained as **Critical** since last 2 years. **Serious** GAM levels ( $\geq 10\%$  and  $< 15\%$ ) were recorded among IDPs in Mogadishu, Kismayo and Dhusamareb in SC region, Bossaso and Qardho in NE region and Hargeisa IDPs in Northwest. **Alert** levels of GAM (GAM rate  $\geq 5\%$  and  $< 10\%$ ) were seen only in Northwest (Burao and Berbera IDPs).

Current nutrition situation among Dhobley IDPs suggest humanitarian crisis as GAM has nearly doubled (from 11% in *Deyr* 2014/15 to 20.7% in *Gu* 2015) and it is accompanied by **Critical** levels of CDR ( $> 1/10000/\text{day}$ ). Immediate treatment of the identified children will help avert situation from getting worse.

During May 2015 rapid assessment in Buldo town, the nutrition survey results found 33 percent prevalence of global malnutrition (MUAC  $< 125\text{ mm}$  and/or oedema), of which 19 percent were severely malnourished (MUAC  $< 115\text{ mm}$  and/or oedema). The surveillance data show encouraging reduction in malnutrition prevalence by June compared to April and May assessments, although there is no statistically significant change. The reduction in malnutrition figures can be attributed to the general food distribution, blanket distribution of plumpy-doz, supplementary feeding programmes (SFP) and outpatient therapeutic programme (OTP) service that are/being implemented by Mercy USA in partnership with WFP<sup>1</sup>.

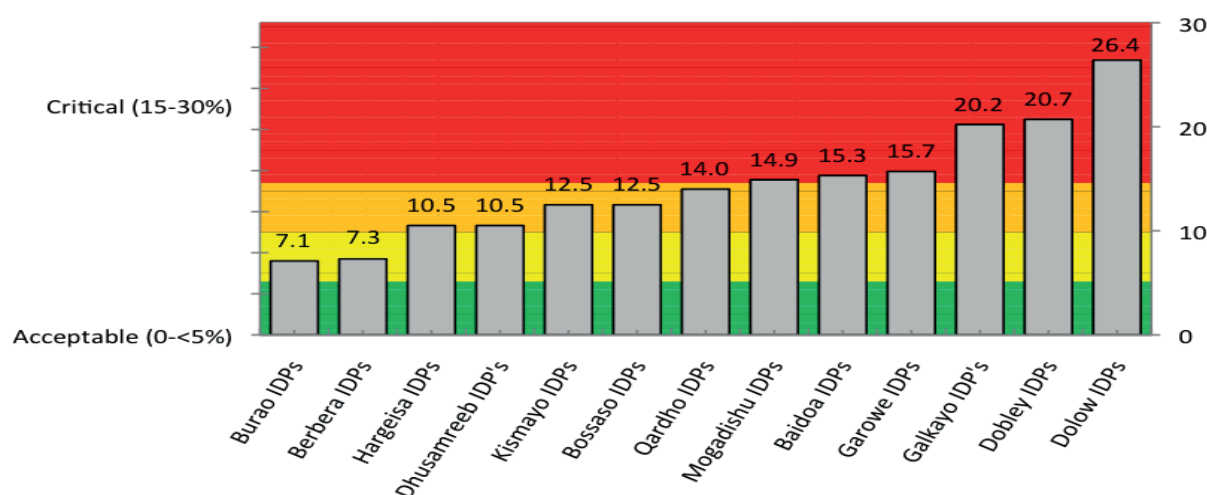


Rapid MUAC Assessment. FSNAU, May 2015

Similar rapid MUAC assessments in Hudur town of Bakool region indicate high prevalence (39.6%) of diarrhoea and fever among under-five children in Hudur during May 2015 assessment compared to June 2015 (20.9% diarrhoea and 15.5% fever). Pneumonia was reported among 18.8 percent of the under five children in May 2015 compared to 5.5 percent reported during June 2015. No cases of measles were reported.

Nutrition situation in Hudur town is improving but the current prevalence of MUAC  $< 12.5\text{ cms}$  (16.4%) suggests situation is still **Critical**.

Figure 4: GAM Prevalence among IDPs in Somalia (*Gu* 2015)



<sup>1</sup> Humanitarian response :Mercy USA distributed general food ratio to town nearby outskirt residents and started SFP and OTP programs in early May.

<sup>2</sup> Mid-upper arm circumference: MUAC was measured at the mid-point of the left upper arm for measured children (precision of 0.1cm).

<sup>4</sup> Bilateral oedema: Assessed by the application of normal thumb pressure for at least 3 seconds to both feet.

## INTEGRATED FOOD SECURITY ANALYSIS

### URBAN

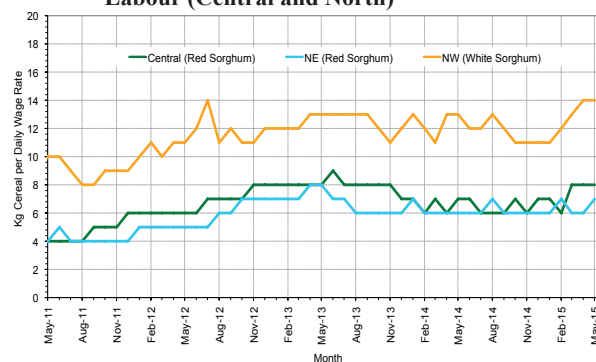
In the post Deyr 2014/15 period most of the urban areas were classified as Stressed (IPC Phase 2) or Minimal (IPC Phase 1). However, urban areas in Bakool (Hudur and Wajid) and Hiran (Bulo Burto) regions were classified in Crisis (IPC Phase 3) due to continued trade embargo by insurgents (since early 2014), which led to a significant surge in food prices and reduced labour opportunities of urban population. The factors that determined urban food security situation in Somalia in the post Deyr 2014/15 included trends in the cost of living, security situation and their effect on trade and livelihood activities, and purchasing power of the urban poor. The trends in these indicators were analysed to suggest any changes in food security situation in urban areas in the post-Gu 2015.

In January-May 2015 period, the cost of the Minimum Expenditure Basket (CMB) experienced mild (less than 10%) changes (increases/decreases) in local currency terms in the main urban markets of most regions. Exceptions are main markets of Central (Mudug) and Hiran where CMB declined (10%) and Lower Juba where it has increased (10%) driven by respective changes in cereal prices. Annual comparisons (May 2014) indicate moderate declines in the minimum cost of living in most regions. The most significant decline was recorded in Hiran (19%) as a result of decrease in local cereal prices following recent (May 2015) humanitarian food distributions. However, moderate increase in CMB was recorded in Banadir (17%), mostly due to increase in local cereal price.

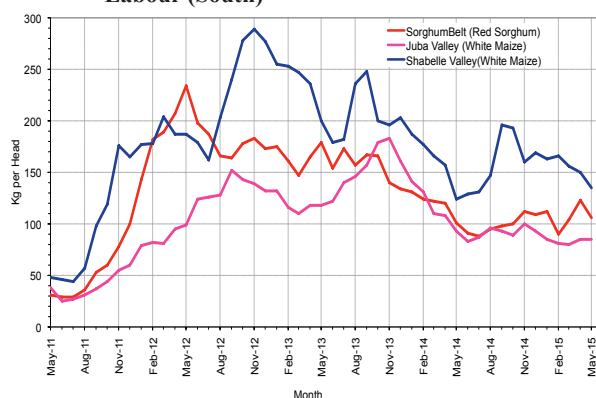
As shown by urban surveys undertaken in Somalia in the past few years, casual labour (e.g. portage, construction) represents major activity (source of income) of the urban poor. In such regions as Lower Shabelle, Lower Juba and Banadir, agricultural labour in surrounding rural areas is also among the major sources of income of poor urban people. The FSNAU market monitoring information indicated improved or relatively stable casual labour wages in most regions in January-May 2015. Annual comparison indicates mild changes in most parts of the country with the exceptions of Hiran (Beletwein), Lower Juba and Bakool (Hudur and El-Barde). In particular, labour wages decreased by 33 percent in Bakool region, notably in El-Barde town due to reduced economic/trade activities compared to a year ago as a result of indirect effect from the ongoing siege in Bakool region that has cut primary supply routes (Bay and Banadir) of commercial goods to the district. Conversely, labour wages increased moderately (12-19%) in Hiran and Lower Juba due to increased demand for labour for Gu farming as well as Kismayo port activities. However, a deviation in the wage rate trends from the pattern of the past five years (2010-2014) was noted in Bakool, Gedo, Bay, Hiran and Northwest. Specifically, the labour wages in most of these regions (apart from Bakool) increased (18-34%) as a result of improved farm labor opportunities due to several seasons of favourable harvests, which has reduced competition for labour from rural population in urban centres. However, in Bakool region labour wages declined (29%) compared to the five-year average primarily due to conflict and siege imposed by insurgents as from March 2014. In SoSh areas, the lowest wage rate in May 2015 was recorded in Bakool (36 916 SoSh), while the highest was in Gedo (155 850 SoSh) due to high labour demand for loading/ off-loading of commercial goods in the border towns of Gedo of Bulo-hawa (linked to Kenya) and Dolow (linked to Ethiopia). Wage rates ranged from SISH 36 000 to 60 000 in the North SISH areas.

The Terms of Trade (ToT) between daily labour (unskilled) wage and cereals, which approximates the actual purchasing power of the urban poor, remained unchanged or declined in most regions of the South (by 1-3 kgs of cereals/ daily labour wage) in January-May 2015 (Figures 5 and 6). The ToT either remained unchanged or increased by 1kg/daily labour wage in central and northern regions during the same period. The highest nominal ToT between labour and cereal in the month of May 2015 was recorded in Bay and Gedo regions (17kg/daily labour wage), while

**Figure 5: Regional Trend in Terms of Trade Cereal to Labour (Central and North)**



**Figure 6: Regional Trend in Terms of Trade Cereal to Labour (South)**





the lowest was in Bakool region (3kg/daily labour wage). The annual comparison indicates increased or stable trends in the ToT in most parts of the country apart from Banadir showing a decline by 3kg/daily labour wage. The trend in Banadir was primarily driven by the surge in cereal prices due to the increased demand following large influx of IDPs from Yemen to Mogadishu-city. The highest annual increase (by 3kgs of cereals/ daily labour) was noted in Gedo due to the increase in daily wage, mainly in border towns of Gedo (Belethawa and Dolow). Compared to the five-year average, ToT between daily labour (unskilled) wage and cereals increased (1-3kg/daily labour wage) in most regions of the country apart from Bakool where it declined by 43 percent (3kg/daily labour wage).

### Urban Areas Under Siege

From early 2014 the insurgents that have been pushed out to rural areas by the Federal Government of Somalia after taking control of large parts of southern districts, have blocked movement of goods to the main towns of Bakool (Hudur and Wajid) and Hiran (Bulo Burto) regions. This resulted in reduced availability and access to food in the affected towns and led to deterioration of food security conditions in the past one year. However, the nature of the siege and severity is different among the districts, with some of them experiencing a complete and some a partial siege (i.e. there are other secondary supply routes that are still open). Normally, the main food supply roots to the affected towns include Mogadishu, Beletweyn and Baidoa.

Between January and May 2015, local grain prices increased (by 18%) in Bulo Burto due to continued complete siege in the town. However, recent humanitarian supplies by air (May 2015) have stabilized prices of sugar, wheat flour and vegetable oil between April and May although they still exceed the levels in January 2015 (by 30%, 26% and 5% respectively). In Bakool, local cereal prices declined in both Hudur (11%) and Wajid (17%) since the beginning of the year due to humanitarian food distributions in April and May 2015. However, the prices of imported commodities (sugar, wheat flour) are still significantly higher than in January 2015, particularly in Wajid (by 29% and 32% respectively). In addition to these regions, local grain prices increased by 11 percent in the same period in Qansahdere (Bay) district, due to road blockage by insurgents. Compared to one year ago, significant price declines were recorded for cereals (by 46%) as well as other imported commodities (by 28-40%) in Hudur due to improved access of food through alternative routes.

Since the beginning of the year, the ToT between daily labour (unskilled) wage and cereals rose (by 1 kg/ daily labour wage) in Hudur but remained relatively stable in Bulo Burto. Among the three sieged towns, the lowest ToT in May 2015 (2kg/ daily labour wage) was recorded in Wajid. Annual comparison indicates improved ToT in Hudur (by 4kg/ daily labour wage) as a result of increase in wage rates and decline in cereal price.

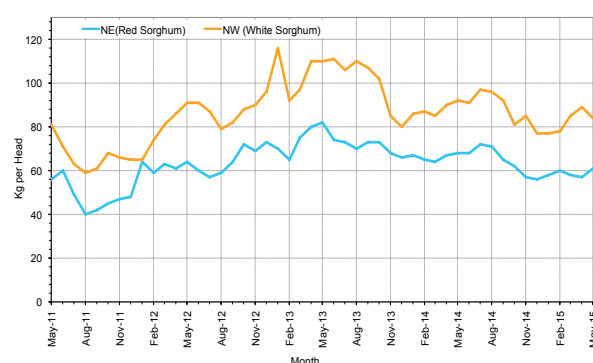
## RURAL

### Northern regions

In the post *Deyr* 2014/15 (February-June 2015), most of the rural livelihoods of Northeast regions (most parts of Hawd and NIP) as well as Hawd, West Golis/Guban and East Golis livelihoods were classified as **Minimal** (IPC Phase 1), while the remaining livelihoods in the North were categorized as **Stressed** (IPC Phase 2). This improvement is largely attributable to increased food production (milk) and improved livestock asset holding of pastoralists, favourable livestock prices and relatively stronger purchasing power of pastoralists.

Average to above average *Gu* rains have improved rangeland and water resources in most livelihood zones in the North. However, pasture and water conditions are below average/ poor in the areas with erratic *Gu* rains such as Bari (upper part of Coastal *Deeh* and parts of NIP livelihood), Sanaag (East Golis of Laasqoray/Erigavo and NIP of Erigavo), Togdheer region (agropastoral of Burao/Sheikh and localized area of Hawd/Golis) as well as agropastoral areas in Awdal and Woqooyi Galbeed regions. The worst rangeland conditions are reported in Guban pastoral livelihood of Awdal region, which has completely missed *Hays* seasonal rains (December – February). Livestock migration is normal in most northern livelihoods, but abnormal migration is reported from the above-mentioned rain-deficit areas (see *Livestock sector*). Livestock body condition remains largely average to above average in most of the North (PET score of 3-4) due to improved pasture and migration options. However, body conditions

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



of lactating animals and the livestock in the rain-deficit areas are below average (PET score of 2). Medium kidding/lambing of goats and sheep occurred during this *Gu* season in most of the northern rural livelihood zones. In the Northwest, cattle that conceived in the last *Gu* season started to calve at low to medium rates during last *Jilaal* (February-March), while low to medium camel calving is anticipated to start in late June and continue up to the end of August 2015 in most of the pastoral livelihoods in the North. Consequently, milk availability is expected to be near normal to normal in most areas or livelihoods.



*Medium Lambing Northern Inland pastoral, Cel-Af-weyn, Sanaag, FSNAU, June 2015*

In the agropastoral livelihoods of the Woqooyi Galbeed and Awdal regions, yellow maize and sorghum crops planted during the *Gu* season have failed due to poor rains. However, *Gu* cereal production is secondary to the major *Karan* cereal harvest (collected in October-November), the level of which will depend on the performance of the *Karan* rains (July-September 2015). In Togdheer Agropastoral, the crop establishment is average in potential producing districts of Odweine, but below average in Burao and Sheikh due to below normal *Gu* rains. Regeneration and production of natural grass fodder in Togdheer Agropastoral is fairly normal in Odweyne district and poor in other districts in accordance with the *Gu* 2015 rain behavior.

From January to May 2015, local quality goat prices remained relatively stable in most northern markets, while imported rice prices either declined marginally or remained stable. Reflecting these trends, the ToT between local quality goat and imported rice remained more or less stable in most of the northern regions. The exception is the Awdal region (Borama market) where the ToT declined by 18 percent (from 82 to 67kg/head), primarily due to depressed goat prices (by 24%) as a result of below average/poor body condition. In May 2015, the ToT (goat/ rice) ranged from 62 to 111kg/head in the Northeast and from 50 to 84kg/head in the Northwest. The lowest ToT was recorded in Zeylac (52-50kg/ head) and Erigavo (78-62 kg/ head), which is a normal occurrence since 2012. The ToT between local quality goat and rice dropped in Zeylac (by 2 units) and Erigavo (by 16 units) from a year ago (since May 2014) as a result of declined goat price (14% and 21% respectively) due to deteriorated body condition, following below average to poor rains.

Sorghum is another widely consumed type of cereal, particularly by poor households, with red sorghum dominant in the Northeast (transported from southern regions) and white sorghum in the Northwest (produced locally). In the Northeast, the ToT between local quality goat and red sorghum exhibited mixed trends in January-May 2015, declining by 7 units in Bossaso market (67 kg/head) and gaining 10 units in Garowe market (71 kg/head) as a result of increase in sorghum prices (5%) in the former and decrease (13%) in the latter. The differences in sorghum price trends are attributable to transportation costs in two locations considering that petrol prices increased significantly (17%) since the beginning of the year in Bossaso, due to intermittent supplies from Yemen, while in Garowe (which is closer to the supply markets from the South) petrol prices remained relatively stable. In the Northwest, the ToT between local quality goat and white sorghum mostly increased, apart from the Awdal region where it declined as a result of reduced goat prices. In May 2015, the ToT white sorghum/head value ranged from 59kg/head (Zeylac market) to 120kg/head (Hargeisa market). The ToT between local quality goat and local cereals declined annually by an average of 9-10 percent, both in Northwest (from 92kg/head to 84 kg/head) and in Northeast (from 77 kg/head to 69kg/head, respectively) [Figure 7].

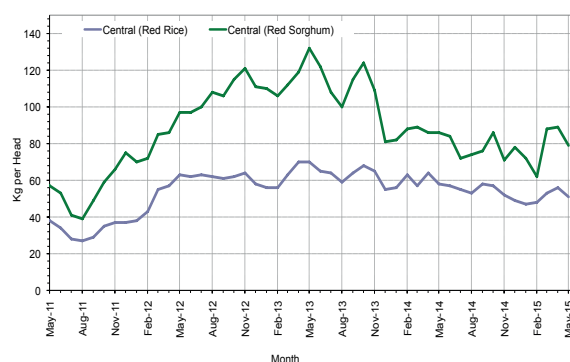
## Central Regions

In the post-*Deyr* (January-June 2015), the food security situation in most rural livelihoods of central regions was classified as **Stressed** (IPC Phase 2) with the exception of Hawd of Mudug regions, which were classified as **Minimal** (IPC Phase 1). This marked an improvement from the previous season, which was a result of average rainfall performance that led to increased availability of pasture and water, households' own production (milk, meat and cowpea crop) as well as declined prices of imported foods (rice).

As a result of average to above average *Gu* 2015 rains, pasture, browse and water availability is average to above average in most of the livelihoods including the rain-deficit areas of the last *Deyr*. Exceptions are parts of Addun (Adado district) and a narrow strip along the coast where pasture and browse are below normal due to below average *Gu* 2015 rains. However, the rain deficit areas will have good migration options to adjacent livelihoods during the forthcoming *Hagaa* dry season (July-September 2015). Currently, livestock migration is low in most livelihoods, except parts of Addun in Adado district, where pastoralists migrated to nearby Cowpea Belt livelihood. Body conditions of livestock species are average (PET 3) in the most livelihood zones of Central regions apart from

camel in the rain-deficit areas of the last season, which were below average (PET 2-3), but improving. Medium kidding/ lambing for goat/sheep occurred during the *Gu* season, while low camel birth rates are expected in June/ July 2015, reflecting conception rates of the previous two rainy seasons (*Deyr* 2014/15 and *Gu* 2014). Milk availability and access improved at household level as well as on the markets due to medium kidding/lambing and increased milk yield for the lactating camel; further improvements are expected from July with anticipated camel calving. Improved milk availability is reflected in reduced camel milk prices in May compared to January 2015 (17%), a year ago (10%) and a five-year average (28%). In the agropastoral parts of Central regions (Cowpea Belt), the cowpea crop is performing well due to widely distributed average to above average *Gu* rains, hence *Gu* harvest is likely to be average to above average. In a normal season, the cowpea crop typically represents 60 percent of the total food production of poor agropastoral households; the cowpea stocks normally last for approximately three to four months after the harvest.

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



In January-May 2015 period, the ToT between local quality goat and imported rice increased mildly (4-8%) both in the Hawd/Addun (from 48 kg/head in January 2015 to 52 kg/head in May 2015) and the Coastal *Deeh*/ Cowpea Belt (from 47kg/ head in January 2015 to 49 kg/ head in May 2015) livelihood zones. These trends are attributable to mild declines in rice prices and increase in goat prices as a result of the start of live animal stocking by traders for the upcoming *Ramadhan* period (June 2015). Similarly, the ToT between local quality goat and red sorghum has increased in all markets of Central, with the highest ToT recorded in Galka'ayo (144 kg/ head in May an increase of 31 percent), primarily due to gains in the goat price. The exception is El-dher market where it has dropped from 73kg/head to 53kg/head due to significant increase (62%) in sorghum prices caused by declines in supplies of the cereal in the context of higher preference for rice consumption by local population. Compared to a year ago, the ToT between local quality goat and red sorghum as well as rice declined in the Central regions by an average of 8 and 12 percent respectively due to declines in goat prices (Figure 8).



*Average Camel Body Condition. Hawd, Dhusamareb, Galgadud, FSNAU, May 2015*

## Southern Regions

In the post-*Deyr* 2015 (February-June 2015), the food security situation in most rural livelihoods of southern regions was classified as **Stressed** (IPC Phase 2). The exception was southern agropastoral livelihoods (SAP) of Middle and Lower Juba regions, which was classified in **Crisis** (IPC Phase 3). The projections for IPC classification were based on the assumptions of average/ below average *Gu* rains, normal off-season crop harvest and *Gu* 2015 farming activities, improved livestock production and cereal stock availability at household level in most of the farming areas.

Currently, the *Deyr* cereal stocks of poor households are already exhausted in all regions of Somalia. However, the cereal supply is normal on the markets. *Gu* rains and interventions in support of farming activities (seeds, tractor hours, canal and catchment rehabilitations) have created job opportunities for poor households in the southern regions to engage in *Gu* farming activities. As a result, daily labor wage rates increased by an average of 20-50 percent in May 2015 compared to the previous month in most regions of the South.

The current outlook suggests a below average *Gu* 2015 cereal crop production. Specifically, *Gu* crop harvest is expected to be poor in Lower Shabelle Agropastoral (maize rain-fed) of coastal areas because of poor rainfall performance. In addition, localized floods in parts of Middle Shabelle regions that resulted in crop damage are likely to affect overall *Gu* harvest in the region. With fewer crops and less income in flooded areas, affected households will experience food shortages in a short-term. The dry spell in June and the sudden cessation of rains in May resulted in low soil moisture levels during critical stages of crop development, thus reducing the potential yields, in agropastoral areas of Lower Juba, Middle Juba, Gedo, Hiran and Bakool, which will receive reduced *Gu* harvests. In order to offset



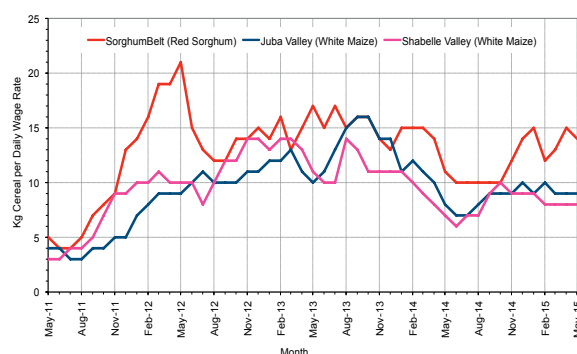
the likelihood of a poor season of sorghum and maize crops, some farmers increased the areas planted under cowpea and sesame and this may limit the effects of cereal shortfalls. In addition, limited off-season harvest is expected in September-October from the flooded areas of Mahadeey and Jowhar (Middle Shabelle) and riverine areas of Lower Juba, Middle Juba and Gedo, which will help to mitigate food shortages among poor farmers (*see Agriculture Sector*). The *Gu* and off-season cereal harvests will improve cereal stock availability in most regions. In the major cereal producing regions of Lower Shabelle and Bay the *Gu* harvest is likely to be below to near average, but the cereal stocks are expected to extend at least up to the next *Deyr* harvest.

The *Gu* 2015 rains have improved pasture condition, replenished water catchments and contributed to improved livestock body condition across the southern regions. During this *Gu* season conception was high for sheep, goats and cattle in most areas but low to medium for camel. Milk availability is near average as a result of average cattle calving. The milk yield of lactating camel has also improved due to improved pasture, while camel calving that started from April will further improve milk availability and access. Livestock herds, particularly small ruminants, are likely to continue recovering in the coming months although they will remain near baseline levels in most pastoral livelihoods. The exceptions are camel herders in Juba and Gedo regions, where herds of camel are above baseline levels.

Overall *Gu* agricultural activities have increased job opportunities for poor households in riverine and agropastoral areas of southern Somalia. As a result, the purchasing power of poor households measured through ToT between daily labor wage rate and cereals increased since the beginning of the year in Gedo (17%), Hiran (11%), Bay (25%) and Bakool (60%); the ToT remained stable in Lower Shabelle and Middle Shabelle, but declined in Middle Juba (12%) due to decline in agriculture labour demand caused by floods. In May 2015, the highest ToT (20kg/ daily labour wage) was recorded in Bay region, while the lowest was in Middle Shabelle (4kg) [Figure xx]. Annual comparison of ToT shows an increase in most regions, with a significant surge noted in Juba (40%) and Shabelle (33%) and a moderate increase (15%) in the Sorghum Belt.

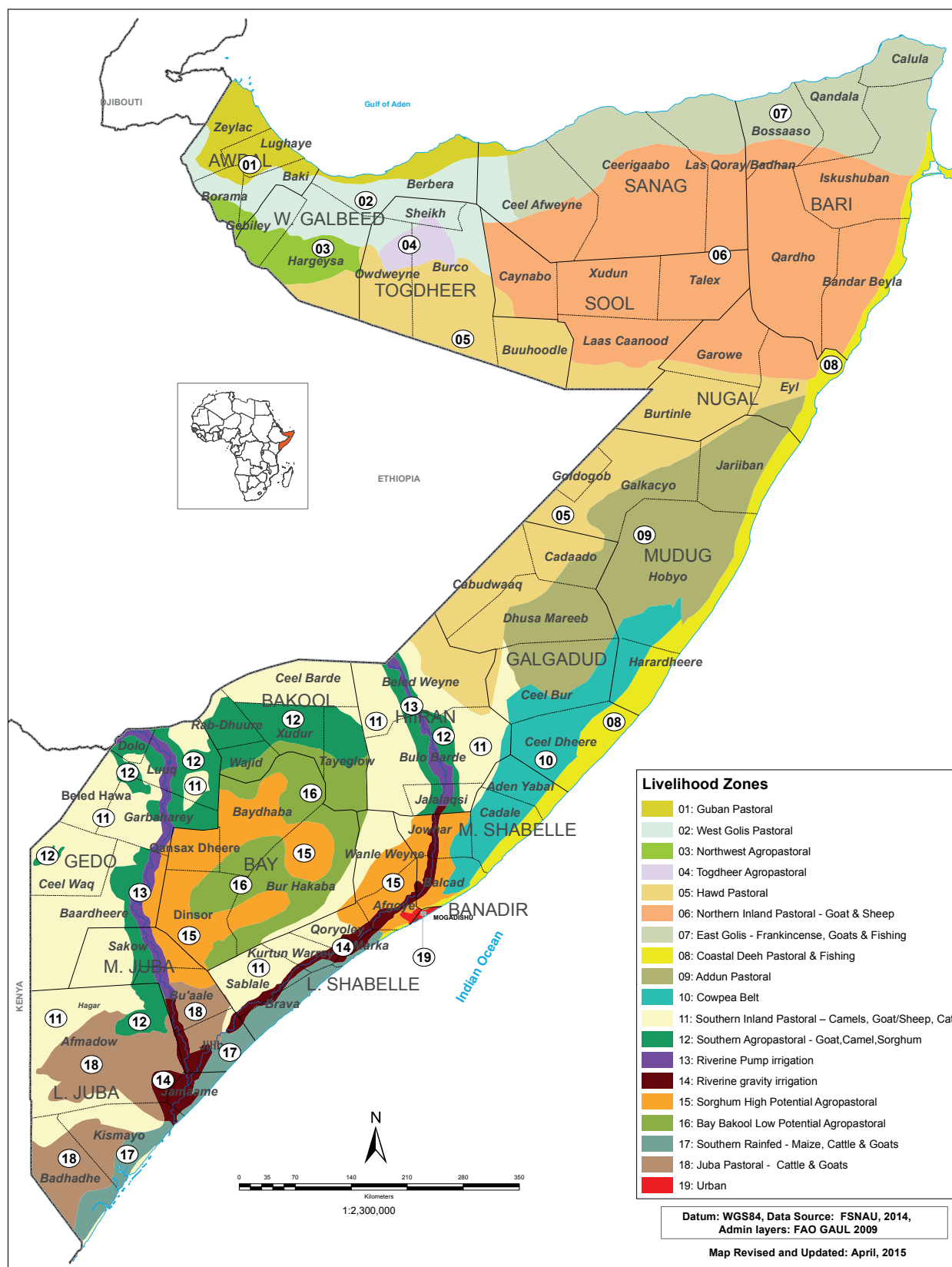
The ToT between local quality goat and cereals showed mixed trend in the Sorghum Belt regions between January and May 2015. It has decreased (7%) in Bay as a result of sustained livestock prices and increased cereal prices; remained stable in Gedo and Bakool regions; and went up significantly in Hiran (35%) due to declines in cereal prices (*see Agriculture Sector*). However, the ToT fell in Juba regions (Lower Juba - 28%; Middle Juba - 7%) as a result of decreased livestock price and increased maize price following below-average harvest in the last *Deyr* season. Similarly, the ToT declined in Shabelle regions (11% in Lower Shabelle and 2% in Middle Shabelle) driven by an increase in maize prices. In May 2015, the lowest ToT was reported in Lower Juba (63Kg/goat) and Gedo (79kg/goat) regions, while the highest ToTs were recorded in major cereal producing regions of Bay (239 kg/goat) and Lower Shabelle (175kg/goat). Annual comparisons show lower ToTs between local goat and local cereals are lower in Bay (30%) and Juba (17%), but higher levels in Hiran (20%), Bakool (13%), Shabelle (8%) and Gedo (4%) regions (Figure 9).

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



*Poor Sorghum. Agropastoral of Beletwein, Hiran, FSNAU, June 2015*

## SOMALIA LIVELIHOOD ZONES MAP



#### Recent publications and releases

- *FSNAU Post-Deyr 2014 Food Security and Nutrition Outlook (February to June 2015), February 2015*
- *FSNAU Post Deyr 2014/15 Food Security and Nutrition Technical Report, March 2015*
- *FSNAU Post Deyr 2014 Nutrition Technical Report, March 2015*
- *FSNAU Special Nutrition Update, April 2015*
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- *Karkaar Dharor Pastoral Livelihood Zone Baseline Report May 2015*
- *Karkaar Dharor Pastoral Livelihood Zone Baseline Profile May 2015*
- *Nutrition Update, June 2015*

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