

KEY ISSUES

Based on ongoing monitoring activities and the findings of the FSNAU's rapid field assessment (June 2016) and climate forecasts for 2016 *Hagaa* (June - July) and *Deyr* (October - December), the Food Security and Nutrition Analysis Unit (FSNAU) projects deterioration of food security conditions in parts of Central and Southern agricultural livelihoods of Somalia in the post-*Gu* period (July-December 2016). The foreseen deterioration is attributed to below average *Gu* harvest outlook as a result of unfavourable *Gu* rainy season, while *Hagaa* (June - July) seasonal rains are also expected to be below normal. In addition, next *Deyr* rainy season (October-December) is likely to be below average in most parts of the country due to likely La Nina event.

- Flood-affected areas of Hiran and Middle Shabelle are likely to be most affected, particularly during the *Hagaa* dry season. Similarly, livestock-dependent coastal areas (Coastal *Deeh* Pastoral and Cowpea Belt) of Central, where poor households mostly own small ruminants, are also likely to see deterioration in their food security situation due to the impact of poor *Gu* rains and anticipated unfavourable *Deyr* rainy season this year.
- On the other hand, recent *Gu* rains have helped to recover pasture, water and livestock conditions in pastoral areas in the Northwest, including the drought-affected areas of Guban and Northern Inland Pastoral (NIP) livelihoods. The agropastoral areas of Northwest, which were affected by drought over the past two years, are likely to see some improvements due to projected above average *Gu-Karan* rains (July-September) with a positive impact on major harvest in November. Improved livestock conditions and increased demand during the forthcoming *Hajj* season (September) are expected to lead to increased livestock prices.
- However, recovery from the lingering impacts of successive droughts and consequent food security crisis situation will be slow in Guban Pastoral livelihood, where households experienced reduction in livestock herd size due to livestock death and accelerated sales during recent drought. Livestock reproduction in this livelihood is expected to be low in the projection period.
- Concerns remain regarding the food security situation in the urban areas of Hiran, Bakool and Bay regions, which have been affected by trade blockade over the past two years. Despite relative improvements in food access in recent months, the food security situation in these towns remains volatile.
- Overall, the 2016 *Gu* cereal harvest in southern Somalia is expected to be 30 - 50 percent below post war average (1995 - 2015) average. The shortfall is attributed to less planting due to poor rainfall performance, moisture stress, pest infestation and flood damage in riverine areas of Middle Shabelle and Hiran regions. The areas with below average harvest include the major cereal producing regions of Lower Shabelle and Bay, which together normally account for 70-80 percent of the total cereal production in southern regions of Somalia. Off-season harvests are expected in September in flood-affected Middle Shabelle and Hiran as well as riverine areas of Juba and Gedo regions, but their contribution to total production is minimal.
- The farmers in Cowpea Belt of Central are also likely to collect poor harvest of cereals and cowpea, which is a main crop produced in the livelihood, normally providing 3-4 months of stock to poor farmers. On the other hand, in the agropastoral livelihood of the Northwest, the *Gu-Karan* harvest is expected to be above average in light of the projected above average *Karan* rains.
- Livestock conditions have improved in several pastoral and agropastoral areas of the country, apart from rain-deficit areas, particularly parts of NIP and Guban livelihoods due to the poor *Gu* rains and anticipated below normal *Deyr* rains, where livestock conditions are below average. Milk availability is expected to be below normal in most areas over the next six months, especially in the rain-deficit and drought-affected livelihoods of Guban and NIP.

Climate

Markets

Nutrition

Agriculture

Livestock

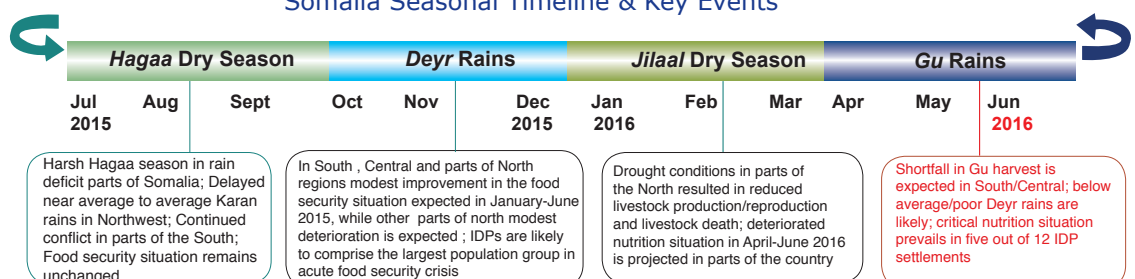
Civil
Insecurity

Emerging
Regional
Issues

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Somalia Seasonal Timeline & Key Events

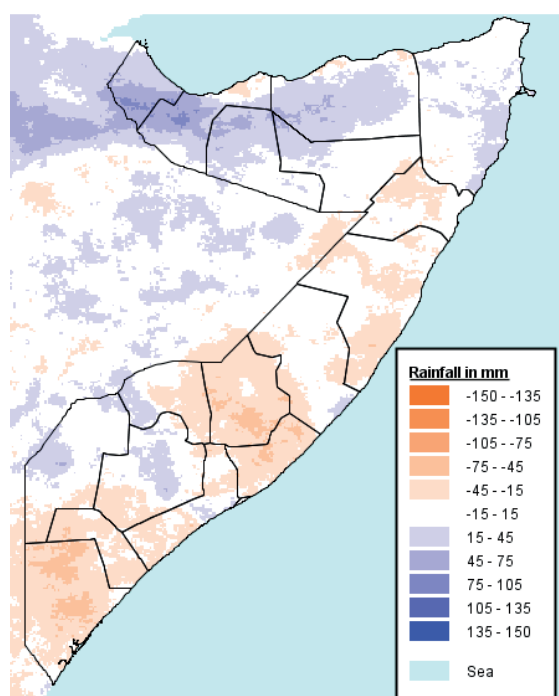


- In most pastoral/ agropastoral areas, livestock (camel, cattle and goats) holding of poor households is likely to be at near or baseline levels, while below baseline levels are projected in Guban, Coastal *Deeh* (Central and North), NIP, West Golis and Northwest Agropastoral. Livestock prices mostly exhibited moderate to mild changes in the past five months.
- The inflation rate measured through the Consumer Prices Index (CPI) of the minimum expenditure basket indicates stability in the cost of living in the Somali Shilling as well as Somaliland Shilling using urban areas of the country over the past five months. However, CPI increased by 9 percent in the South due to increase in cereal prices in anticipation of below normal harvest. This trend contributed to the weakening of the purchasing power of urban households in southern regions. In the context of expected below average *Gu* harvest and bleak outlook for the next *Deyr* harvest, cereal prices are likely to increase at a faster rate than normal in the projection period, which will further undermine food access of urban poor in the coming months. Critical levels of Global Acute Malnutrition ($\geq 15\%$) were noted in six out of 12 settlements of Internally Displaced Persons (IDPs) surveyed by FSNAU in May 2016.
- Recent FSNAU surveys (May 2016) show Critical levels of Global Acute Malnutrition ($\geq 15\%$) in six out of 12 settlements of Internally Displaced Persons (IDPs). These are IDPs in Dhobley, Baidoa and Dolow in the South and Garowe, Bossaso and Galkayo in the Northeast. A drastic deterioration in nutrition situation since *Gu* 2015 in Bossaso IDP, while malnutrition prevalence showed some (relative) improvement among IDPs in Doble.

SECTOR HIGHLIGHTS

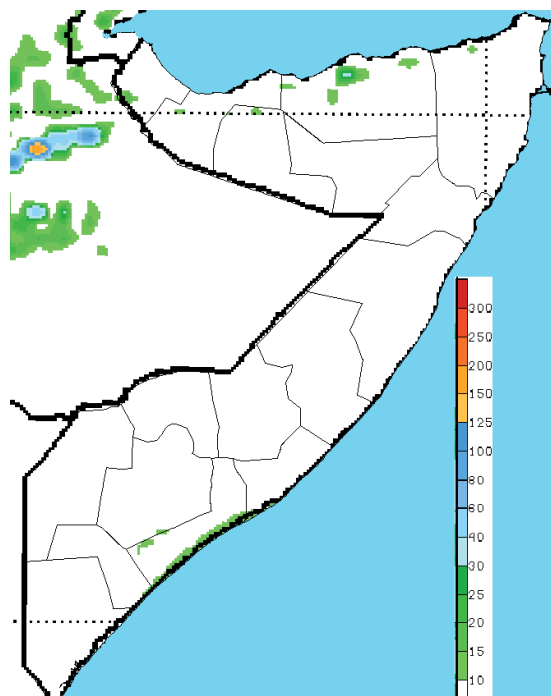
CLIMATE

Map 1: April-June 2nd dekad 2016 TAMSAT Rainfall Anomaly



SOURCE: JRC & TAMSAT

Map 2: NOAA Rainfall Forecast Valid up to July 6, 2016



SOURCE: NOAA

Gu Season Rainfall Pattern by areas (South, Central and North)

The *Gu* 2016 rains were delayed by one to two weeks in many parts of South and Central as well as in the northeast regions. However, *Gu* rains started at the onset in parts the South including Bay, Bakool and Gedo regions and in most parts of Northwest. The April-June *Gu* rainy season performance varied between regions. In the Northwest, average to above average performance in terms of amounts and temporal and spatial distribution were reported in pastoral and agropastoral areas of Awdal, Woqooyi Galbeed, Togdheer and parts of Sanaag regions. However, *Gu* season rainfall performance has been below average in the rest of the country. The areas that received significantly below average rains are most parts of the Northeast, parts of the central and southern regions including Hiran, Galgaduud and Mudug regions and large parts of agropastoral and riverine areas of Juba and Shabelle regions (Map 1).

Below average to average rains fell between the last dekad of April and first dekad of May in localized areas of southern and central regions. However, from mid-May to mid-June, which normally is the peak of the season and also essential for crop and pasture development, most livelihoods of southern and central regions as well as pastoral

livelihoods in the northeast (Nugaal and Bari) and Sool region received little or no rains. However, light to moderate rains with positive impact on water and pasture were reported during the second dekad of June in most livelihoods of Lower Shabelle and Middle Juba in the South.

The Climate Prediction Centre's seven-day forecast ending 6th of July indicates cessation of Gu rains across the country. The satellite further indicates accumulation of Haggah (July-September) in the Southern Rainfed livelihood zones in the Shabele and Juba regions (Map 2).

Floods: time the floods occurred, areas (district, livelihoods) affected, types of areas affected (e.g. cropland, pasture, etc.) From late April to early May, the upstream Juba and Shabelle river waters rose significantly due to the above-average precipitations in the Ethiopian highlands. Consequently, several river breakages occurred in parts of Jowhar and Balad of Middle Shabelle region (Baardheere and Buulo Axmed Ciyow villages) and in few areas in Luuq and Garboharey districts of Gedo region. In addition, continued downpours in the Ethiopian highlands from early May led to severe flooding in Beletweyne town and riverine areas, where large numbers of people were displaced and several agricultural lands were flooded.

Vegetation Conditions

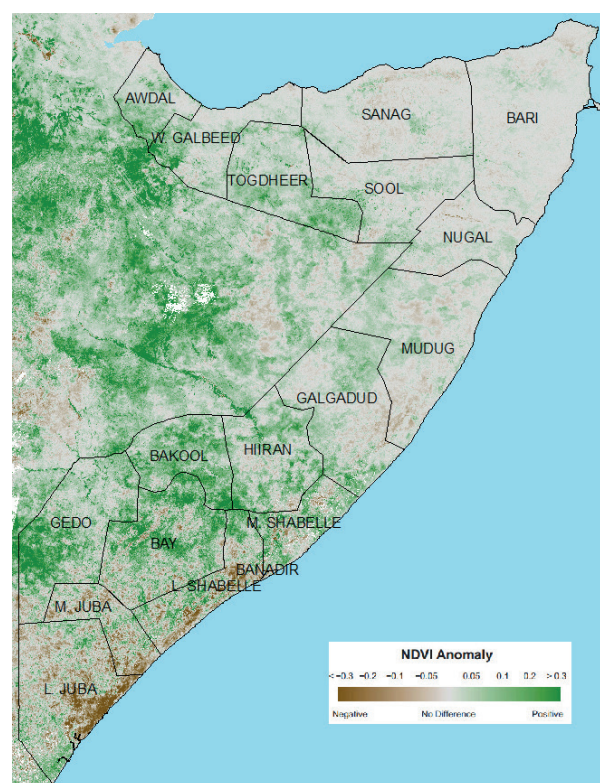
The satellite-derived eMODIS NDVI (Normalized Difference Vegetation Index) indicates that while the *Gu* rains improved rangeland conditions in some parts of the country including much of pastoral and agropastoral areas in much of the Northwest and some key agropastoral areas in the South, below average vegetation conditions due to poor rainfall are observed in key crop producing areas of Lower Shabelle, parts of Bay and Juba regions, as well as in parts of Central, most parts of the Northeast and small pockets in the Northwest (Map 3).

Climate outlook for Haggah and Karan rains and preliminary outlook for Deyr 2016 season

According to updated climate forecast July to September 2016 issued by IGAD's Climate Prediction and Applications Centre (ICPAC), below normal Haggah rains are expected in pastoral, agropastoral and riverine areas along the coast of Juba and Shabelle regions. The forecast also shows above normal to normal Karan rains over much of West Golis and Northwest Agropastoral livelihood zones. The rest of the country will remain seasonably dry during July to September period (Map 4).

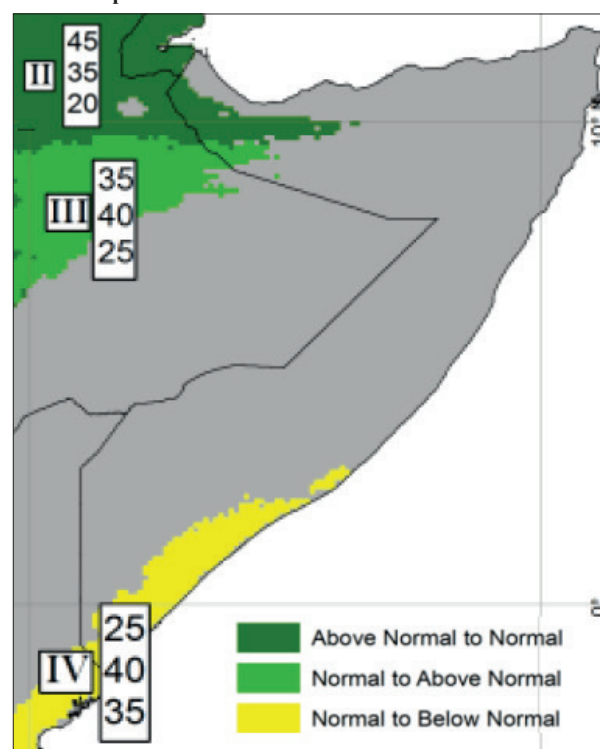
Most El Niño Southern Oscillation (ENSO) prediction models indicate neutral ENSO conditions during June, with likely development (with about a 75% chance) of La Niña (of unknown strength, but likely weak) by late July or August, lasting through late 2016 and early 2017. La Niña is associated with below-average rainfall over the Horn of Africa. Based on this, FEWS NET forecasts indicate that October to December Deyr rains are likely to be below average across most parts of Somalia.

Map 3: NDVI e-MODIS Anomaly June 11-20, 2016



SOURCE: USGS

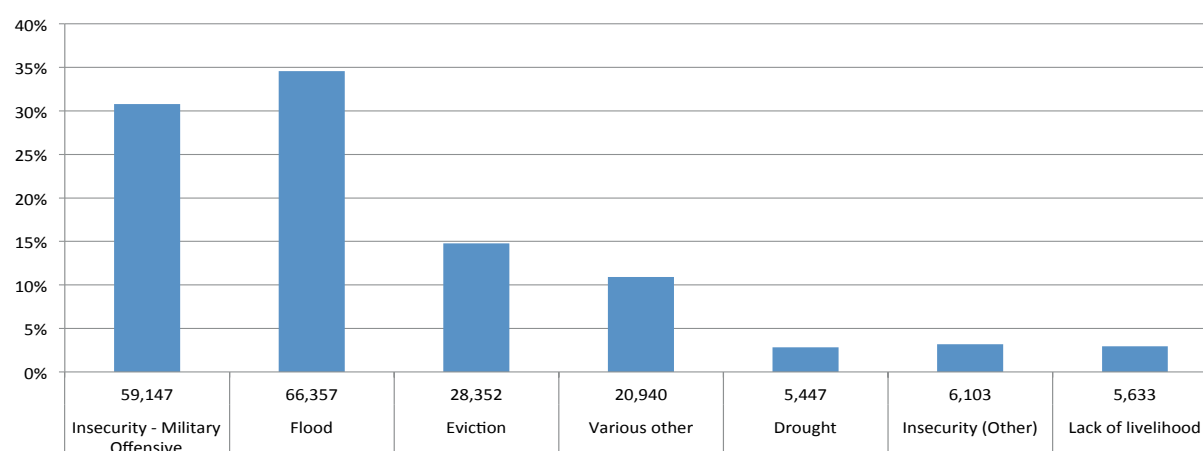
Map 4: GHACOF Consensus Climate Outlook for the June to September 2016 rainfall season



CIVIL INSECURITY

Between January and May 2016 most of the southern regions (Banadir, Lower Shabelle, Middle Shabelle, Bakool, Bay, Gedo and Lower Juba) have experienced intense military activities between insurgents and African Union

Figure 1: March- May 2016 Population Movement



Mission to Somalia (AMISOM) backed by Somalia national armed forces. Targeted killings of prominent individuals, explosions and suicide bomb attacks in high profile hotels have also been occurred in Mogadishu-city. During the reporting period, specifically in the month of March, the coastal district of Puntland (Eyl, Dangoyoro and Jariban) has also experienced a short-term instability upon invasion of insurgents. On the other hand, central regions were affected by political conflicts between the recently established Galmudug state and Ahlu-Sunnah group¹ that resulted in military confrontations in Dhusamareeb and Guri'el districts. Northwest regions of Somalia remained stable during the reference period.

In the same period, livelihood security has also been disrupted by clan conflicts over natural resources in Merka area of Lower Shabelle as well as Hawd of Lasanod (Sool region) and Abud-Waaq (Galgaduud) districts that occurred in January-May 2016 period.

Rural communities in the areas controlled by insurgents continue to face forced tax payments on their private assets such as livestock, farms, vehicles and houses. On the other hand, the effects of trade disruptions caused by insurgents in government-controlled areas in the South such as Bakool (Wajid and Hudur), Bay (Qansadhere and Dinsor), Gedo (Bardhere and Burdhubo), Hiran (Bulo-Burte and Jalagsi) and Middle Shabelle (Adan Yabal) regions have eased off. The food prices have somewhat stabilized in these areas as a result of food aid delivered to the affected areas through an organized military convoy (Bulo-Burte); opening up of secondary supply routes (in Hudur through El-Barde) and adjustments made by local traders to bring food to the areas, including through the use of donkey carts and medium sized trucks.

According to UNHCR, in the last three months (March-May 2016) about 192 000 persons were internally displaced within Somalia. The major reasons of displacement include floods (35%), insecurity arising from military offensive (31%) and evictions (15%). The rest of the displacement was due to various reasons, including clan conflicts, IDP return, forced return, lack of livelihood, drought and other insecurity (Figure 1).

According to UN OCHA (*Humanitarian Bulletin-April 2016*), volatile security situation has affected access and impeded the ability of humanitarian organisations to provide time critical assistance in some areas. Humanitarian organisations face severe physical access in 28 districts in southern and central Somalia. In Bakool, Bay, Gedo and Hiran regions armed non-state actors continue to implement blockades. Proliferation of illegal check points by armed state/non state actors along the major access routes also hamper the movements of humanitarian commodities and commercial goods in South-Central regions.

¹ Armed moderate islamic group that controls Dusamareeb and Guri'el often pro-government. (source:<http://data.unhcr.org/horn-of-africa/country.php?id=197>).

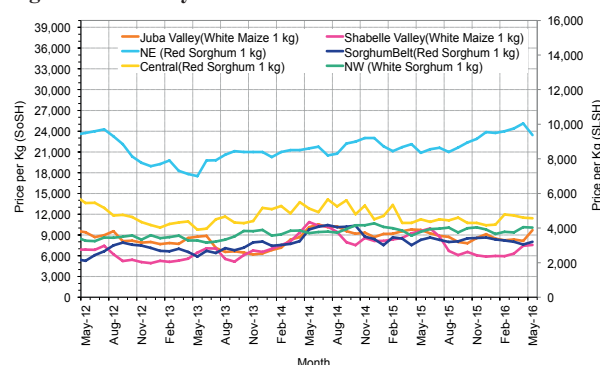
AGRICULTURE

Based on the FSNAU Gu 2016 preliminary assessment results (May 2016), the area planted under cereals is below average in most of the southern regions due to poor rains and early cessation of rainfall, water stress, pest infestations and significant flood damage to standing crops in riverine areas.

In Lower Shabelle, crop performance was poor both in agropastoral as well as riverine areas of Afgooye, Qoryoley, Marka, Barawe and Wanla Weyne districts due to poor Gu rains, insecurity and early drop in river water levels, which constrained irrigation activities and impeded crop growth. The exceptions are riverine areas of Kurtunwarey and Sablale, where maize harvest is likely to be average. Generally, the establishment of maize varies from vegetative to flowering and tussling stages, while sorghum is in the maturity stage. Improved rainfall (*Hagaa*) during the remainder of the season would partly mitigate the negative impact of early seasonal dryness but would not result in a full recovery of the crops. Thus, the *Gu* 2016 cereal harvest is expected to be below average in the region.

In Bay region, which is a major sorghum producer, the *Gu* 2016 planted areas are below average due to below average rains as well as increased planting of cash crops. Pest infestation of crops has also been reported. All these factors are likely to translate into below average cereal harvest for *Gu* 2016. Similarly, in most agropastoral livelihood zones in Hiran, Bakool, Middle Juba, Lower Juba, Middle Shabelle and Gedo regions, cereal harvest prospects are to be below-average levels as yields have been affected by late onset of the rainy season and moisture stress. Rains have generally been erratic and below average and ceased by early-May, i.e. one month earlier than usual, which affecting the crops during critical grain filling stage.

Figure 2: Monthly Trends in Local Cereal Prices



Poor condition Red Sorghum at Geedgab village, Afgoye.
FSNAU, May 2016

The cereal production is also expected to be below average in riverine areas of Hiran and Middle Shabelle due to significant damage to standing crops caused by floods. For example, the recent floods in Beletweyn areas (river overflow in early May) have destroyed standing crops on 5 000 –6 000ha and damaged agricultural infrastructure (canals and culverts). Similarly, floods in Jowhar/Mahaday riverine in late of April have also affected much of the cultivated areas. Likewise, 500 to 700 ha of standing maize were destroyed by similar events in Buloburte district of Hiran. However, these areas are likely to replant the crops (maize and sesame) after flood water recedes and to harvest in August-September 2016. Below average harvest is also expected in the Lower and Middle Juba riverine areas, where a long dry spell in May-June affected maize and sorghum crops at germination/flowering stage. However, average off-season harvest is expected from end of August up until September 2016 in the flooded areas of Middle Shabelle, Hiran, Gedo and Juba *desheks*.

In conclusion the overall 2016 *Gu* season cereal harvest is expected to be 30 - 50 percent below the average for 1995 -2015 (Post-War average).

On the other hand, in the Northwest Agropastoral, the *Gu/Karan* 2016 cereal (yellow maize and white sorghum) production is expected to be to average to above average due to good rains. However, the *Karan* harvest, the major harvest of the region to be collected in October-November, will depend on the performance of *Karan* rains, which currently is projected to be near average. Conversely, in the Cowpea Belt of Central a poor cowpea harvest is expected due to poor *Gu* 2016 rainfall.

Currently, cereals are available in most markets through supplies from *Deyr* 2015/16 harvest, recent off-season harvests and release of carry-over stocks by wealthier farmers. However, due to expected below normal harvest, maize prices have increased between January and May 2016 in the riverine markets of Shabelle (32%) and Juba (44%). In May 2016, the lowest maize prices (3 600- 5250 kg) were recorded in the producing districts of Bay (Diinsor, 3600 SoSh/kg) and Lower Shabelle (Qoryoley, 5,250 SoSh/Kg), while the highest prices were noted in Dolow of Gedo region (Gedwaime; 16 000 SoSh/ kg).

Similarly, red sorghum prices increased in Bakool, Hiraan and Gedo, but decreased in Bay (12%) in the same period, while white sorghum prices rose in Hiran (25%) and the Northwest (5%). Compared to a year ago, both maize and sorghum (white/ red) prices show mixed trend in May 2016. Maize prices slightly decreased in Lower Shabelle (16%) and Middle Shabelle (7%) compared to May 2015 as markets are generally well supplied. In contrast, the maize prices were 17 percent higher compared to the previous year's level in Juba regions. In the Sorghum Belt, the sorghum price has declined by 25 percent in Bay and 12 percent in Bakool, while it has increased in Hiran and remained stable in Gedo in the same period (Figure 2).

LIVESTOCK

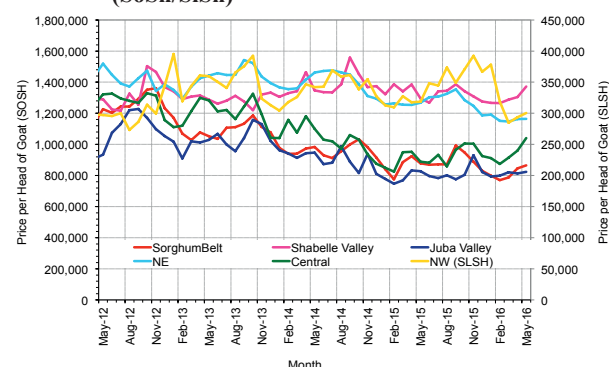
Pasture, Water, Migration, livestock prices and Livestock export

Despite a shorter than normal duration of *Gu* rainy season (started late and ended early), pasture, browse and water conditions have improved in several pastoral and agropastoral areas of the country. However, pasture and water conditions vary from below average to poor in the Northeast (Coastal *Deeh*, parts of NIP and eastern part of Addun livelihoods), Sanaag (East Golis of Laasqoray and NIP of El-afweyn), Togdheer (localized parts of Hawd) and Sool (parts of NIP and pockets of Hawd) due to poor *Gu* rains. Currently, the worst rangeland conditions are reported in parts of NIP, Coastal *Deeh* of Northeast, Coastal *Deeh*/ Cowpea Belt of Central and Middle Shabelle, while extreme water shortage is reported in eastern part of East Golis of Qandala district, parts of SIP and Sorghum High Potential of Lower Shabelle (Wanla Weyne, Qoryoley and Afgoye districts) and parts of SIP of Juba and Gedo regions. Below average *Gu* rains in parts of the South-Central regions is likely to result in early pasture and water depletion over the course of the *Hagaa* dry season (July-August 2016). This includes parts of Gedo (SIP and Sorghum High Potential), coastal areas of Juba/ Shabelle and Central regions, Hiran Agropastoral, Cowpea Belt of Central and Middle Shabelle, parts of Juba Pastoral (cattle), parts of Hawd and Addun (Dhusamareb district) and parts of Addun (Celbur, Hobyo and Adado districts) in Central regions. However, *Hagaa* (June-July) rains, which have already started in Lower Shabelle, may alleviate pasture and water shortages in the rain-deficit areas along the coast.

Livestock migration is normal in most parts of the country apart from few areas in the North. Specifically, abnormal migration is reported to the Sool and Sanaag regions from parts of the NIP livelihood of Bari Region. In most of the pastoral and agropastoral livelihood zones of the country, livestock body conditions are near average to average, which is equivalent to a score of 3 on 1-5 scale of the Pictorial Evaluation Tool (PET) for livestock. Exceptions are the above-mentioned rain-deficit areas, particularly parts of NIP livelihood, and lactating animals, with below average (PET 2) body conditions of small ruminants. Medium kidding/lambing of goats/ sheep and low to medium calving of cattle (March/April) and camel (as from June) is reported across the country. Consequently, milk availability is expected to be near normal to normal in most areas over the next six months, apart from the rain-deficit and drought-affected livelihoods of Guban in Awdal and Northwest Agropastoral. Herd dynamics analysis outcome for the post *Deyr* 2015/16 mostly indicated increasing trend of livestock (all species). Camel holding amongst poor pastoralist is projected to be at baseline or above baseline with the exception of Coastal *Deeh* (Central and North), where it is likely to remain below baseline levels. Similarly, sheep and goat holding is at baseline to above baseline in most of the livelihoods apart from Guban, Coastal *Deeh* of Central, NIP, West Golis and Northwest Agropastoral, which are below baseline. Cattle holding in South and the northwest are at baseline or above, while is below baseline in Cowpea Belt and Coastal *Deeh* of Central region (Figure 3).

Livestock prices for all species showed mixed trends with moderate to mild changes (decline / increase) in most markets in the first five months of the current year (January-May 2016). However, significant gains in value of big ruminants were recorded in the districts of Wanla Weyne and Luuq (63% and 34% respectively for cattle) and Hudur (30% for camel).

Figure 3: Regional Trends in Local Quality Goat Prices (SoSh/SISH)



Average body condition, Southern Inland pastoral, Belet-Weyn, Hiran, FSNAU, June 2016

These gains could be attributed to improved body condition as a result of near average to average rains as well as inflation of the Somali shilling, particularly in Hudur, where newly printed money from Puntland was injected. In May, the highest local quality goat price (1 510 000 SoSh) was recorded in Bossaso, while the lowest was in Sakow (665 000 SoSh). Annual comparisons indicate mostly declines in local quality goat price, with the largest drop (24%) recorded in Hargeisa market due to oversupply from drought-affected areas for debt repayments as well as livestock migration near Hargeisa town due to good rains. Similarly, big ruminants have also lost value from a year ago, most significantly in Sakow (29% for cattle), Garowe and Jamame (24% and 33% respectively for camel) due to limited demand for Sakow and Jamame caused by the insecurity. The local quality goat prices are lower than their five-year average levels in most regions.

In the first quarter of the year, 878 507 heads were exported from Berbera (60%) and Bossaso (40%) ports. This is lower (by 10%) compared to the same time last year, which is attributable to the impact of drought as well as reduced demand from the United Arab Emirates (U.A.E).

MARKETS AND TRADE

Due to the expected below average *Gu* cereal harvest and prospects of post *Deyr* rainy season, local cereal prices are likely to increase significantly towards the last quarter of the year.

Exchange Rate Trends

The Somali shilling has been largely stable in many parts of the SoSh-using areas during January-May 2016. However, over the past year, the SoSh exhibited a depreciation (16%) in parts of Northeast (Bossaso) of the country to trade at around SoSh 24 400 per United States Dollar (USD) in May. This is due to entry of new currency notes printed by the Puntland Authority late last year. On the other hand, the Somaliland shilling (SiSh) remained generally stable against the USD between January and May 2016 and compared to 12 months ago.

Cereal Imports and Commodity Price Trends

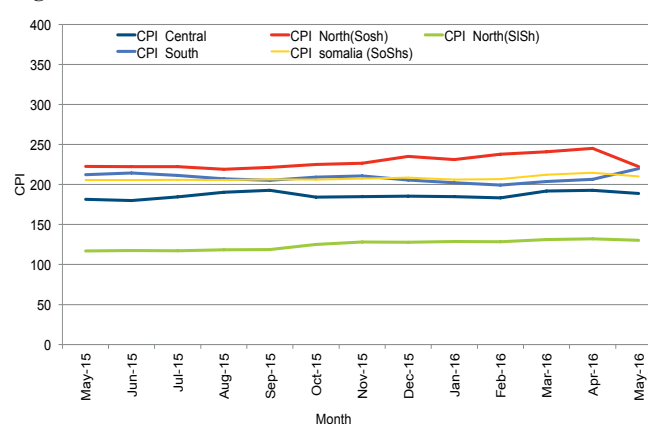
The average prices of most essential imported commodities such as rice, wheat flour, diesel, sugar and vegetable oil were seasonably stable across most reference markets in January-May 2016. This is attributed to favourable prices on the international source markets and ample stocking during the current high seas season (May-August), ensuring increased trade supply from ports for pre-stocking to counteract the monsoon windy season off the Indian coast. The average annual price changes from May 2015 indicate overall stability or modest decline in most markets in the country. The imported commodity prices are generally below the five-year average prices in most key markets of the country.

January to May 2016 cross border exports of sorghum and maize from Ethiopia to Central and Northern Somalia increased to 2 917 tonnes or by 23 percent compared to the same period last year due to reduced local availability and relatively high prices in the northern region thus providing good margins for cross border traders. Similarly, re-exports of rice, sugar and wheat flour from Somalia to Ethiopia and Kenya increased by 10 percent due to lower prices for these commodities inside Somalia and substantial demand in the neighboring countries of Kenya and Ethiopia.

Consumer Price Index (CPI)

The CPI for urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), indicates stability in the cost of living both in the Somali shilling and Somaliland shilling using urban areas of the country over the past five months except in the South where the CPI increased by 9 percent (Figure 4). The CPI is however modestly elevated (3-11%) over the May 2015-May 2016 period in most parts of the country due to reduced local cereal availability during the current hunger period when many households have low stocks and revert to the markets for food; notably, in Banadir, CPI decreased (11%) due to decline in cereal (red sorghum) price.

Figure 4: Consumer Price Index



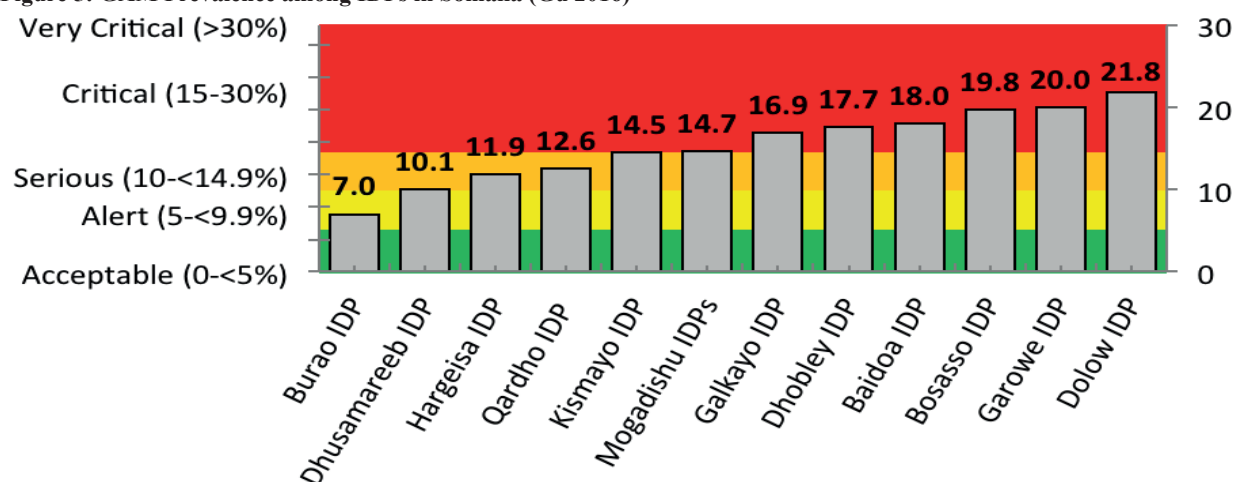
NUTRITION SITUATION

In *Gu* 2016, FSNAU and partners have conducted a joint nutrition and food security assessments among the 12 IDP settlements located across Somalia from May 28–June 2/3. A total of 6 392 children (6-59 months), 3 710 of women in the reproductive age group (15-49 years) from 4 599 households were covered. Acute malnutrition in children 6-59 months is a direct outcome indicator of recent changes in nutritional status. Figure 5 shows the summary of nutrition situation in *Gu* 2016 among 12 IDP settlements across Somalia.

Results from these surveys indicate that Global Acute Malnutrition (GAM) are Critical ($\geq 15\%$) in six out of 12 IDP settlements surveyed. In four additional settlements GAM levels are Serious (10 -14.9%). Since *Gu* 2015, a drastic deterioration in nutrition situation is noted in Bossaso IDP located in Northeast (NE) region while malnutrition prevalence in Doble IDP in South-Central region showed an improvement from a GAM of 20.7 percent to 17.7 percent, however, the change in prevalence was not statistically significant. Critical levels of GAM ($\geq 15\%$) were observed among five IDPs out of 12 surveyed during *Gu* 2016 assessment. These are among Dhobley, Baidoa and Dolow IDPs in South-Central regions and Garowe Bossaso and Galkayo in Northeast region. It is of concern that nutrition situation in three of these IDPs (Dolow, Garowe & Galkayo) is sustained as Critical over the past two years. Serious GAM levels (10-14.9 %) were recorded among IDPs in Mogadishu, Kismayo and Dhusamareb in SC region, Bossaso and Qardho in NE region and Hargeisa IDPs in NW. Alert levels of GAM (5-9.9%) were seen only in Northwest (Burao IDP).

Current nutrition situation in Bossaso IDP warrants an immediate humanitarian assistance as the GAM prevalence has increased from Serious to Critical threshold (from 12.5% in *Gu* 2015 to 19.8% in *Gu* 2016) and it is accompanied by Critical levels of CDR 0.42(0.09-1.88) when considering the lower confidence interval ($>1/10000/\text{day}$). Immediate treatment of the identified children will help avert situation from getting worse.

Figure 5: GAM Prevalence among IDPs in Somalia (*Gu* 2016)



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The urban food security situation has considerably improved in most parts of the country in the post-*Deyr* 2015-16. Number of urban people classified in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) reduced from the post-*Gu* 2015 estimates by 37 and 76 percent respectively, down to 47 000 and 7 000 people in the post-*Deyr* 2015/16. An estimated 2 324 000 additional urban people were classified as Stressed (IPC Phase 2), the majority of whom (58%) were concentrated in the southern regions. The urban areas in Awdal, Woqooyi Galbeed, Mudug, Middle and Lower Shabelle and Bay (Baydhaba and Buur Hakaba) Regions were identified in Minimal (IPC Phase 1) food insecurity in the post-*Deyr* 2015/16. Factors that contributed to the urban food security situation in the post-*Deyr* 2015/16 include stable or improved purchasing power of urban people, declined cost of the MEB (CMB), and significantly improved food security situation in most neighbouring rural livelihoods.

In January-May 2016 period, the CMB exhibited mild (less than 10%) changes (increases/decreases) in local currency terms in the main urban markets of most regions. Exceptions are main markets of Hiran and Juba where CMB increased (12-22%) due to respective increases in prices of cereals and food imports resulting from interruptions

in supplies caused by floods in Hiran and impassable muddy roads in Juba during the Gu rainy season. Annual comparisons (May 2015) indicate mixed trend patterns in the minimum cost of living in most regions; specifically, moderate decrease (11-19%) were recorded in Mogadishu, Bakool and Shabelle regions due to declines in cereal prices, while moderate increases (14-19%) were noted in Awdal, Mudug, and Juba regions caused by increase in cereal (red sorghum) prices.

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 relative stability or mild changes of casual labour wages in most regions in January-May 2016. However, annual comparison indicates mixed trend patterns. Specifically, the wages declined (16%) in Lower Shabelle due to less job opportunity for agriculture as a result of poor rains as well high competition for urban employment. Conversely, the wages have increased year-on-year (13-38%) in Northwest, Lower Juba, Middle Shabelle, Mogadishu and Bakool; the highest increase (38%) was noted in Bakool attributable to increased labour opportunities in the context of improved security situation. The annual changes in wage rates were mild in other regions of the country. A deviation in the wage rate trends pattern from the past five years (2011-2015) was noted in Bakool, Middle Shabelle, Mogadishu, Bay, Lower Juba and Northwest. Specifically, the labour wages in most of these regions (apart from Bakool) increased (16-37%) compared to five-year average levels as a result of improved farm labor opportunities due to several seasons of favourable harvests, which have reduced competition for labour from rural population in urban centres. However, in Bakool region, labour wages are lower (14%) than the five-year average, primarily due to conflict and siege imposed by insurgents. In SoSh areas, the lowest wage rate in May 2016 was recorded in Bakool (51 000 SoSh), while the highest was in Mogadishu (160 000 SoSh) due to higher demand for casual labour in the capital. Wage rates ranged from SSh 40 000 to 64 000 in the North SSh areas.

The Terms of Trade (ToT) between daily labour (unskilled) wage and cereals, which approximates the purchasing power of the urban poor, remained unchanged in central and northern regions, but declined in most regions of the South (by 1-8kgs of cereals/ daily labour wage) in January-May 2016 (Figure 6 and 7). The highest drop (8kgs of cereals/ daily labour wage) in ToT was recorded in Mogadishu resulting from an increase in the price of commonly consumed white maize. Notably, Bay ToT rose by 5kgs of cereals per daily labour wage in the same period as a result of declined (22%) red sorghum prices due to good production last *Deyr* season and reduced cereal outflow in the context of worsened insecurity. The highest nominal ToT between labour and cereal in the month of May 2016 was recorded in Bay region (22kg/daily labour wage), while the lowest was in Bakool region (6kg/daily labour wage). The annual comparison indicates increased or stable ToT trends in most parts of the country, apart from Gedo showing a decline of 3kg/daily labour wage. The trend in Gedo was primarily driven by the increase (12%) in cereal prices and decrease in labour wages compared to a year ago. Compared to the five-year average levels, ToT mostly shows increases (1-3kg/daily labour wage) except in Hiran and Gedo regions where it declined (1-2kg/daily labour wage).

Urban areas under siege (Hudur, Wajid, Buloburto and Dinsor)

Since early 2014, the insurgents who have been pushed out to rural areas by the Federal Government of Somalia after taking control of large parts of southern districts, have been blocking movement of goods to the main towns of Bakool (Hudur and Wajid) and Hiran (Bulo Burto) regions. Trade interference caused by insurgents has also been experienced in Bay (Dinsor) region since mid-2015. Trade disruptions resulted in reduced availability and access to food in the affected towns and led to deterioration of food security conditions in the past two years. However, the

Figure 6: Regional Trend in Terms of Trade Cereal to Labour (Central and North)

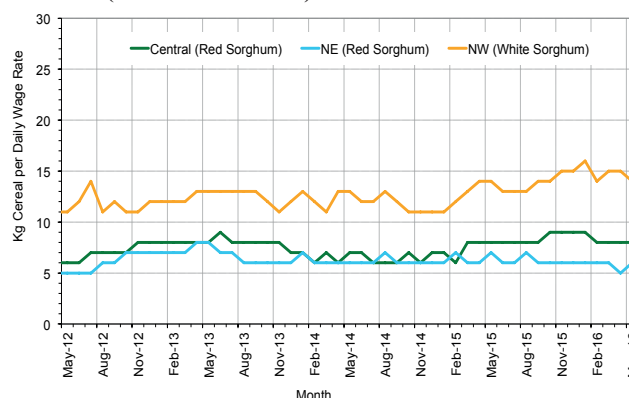
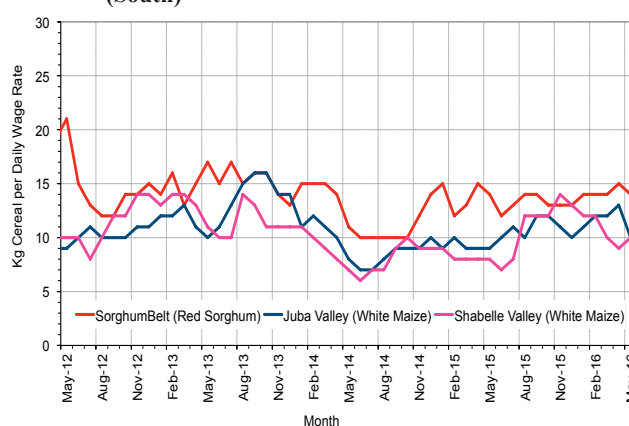


Figure 7: Regional Trend in Terms of Trade Cereal to Labour (South)



nature of the siege and severity is different among the districts. Some of these districts experience a complete siege, while others are under 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 2016, local grain prices changed mildly (less than 10%) in all of the siege-affected markets except in Dinsor where prices declined (34%) due to reduced cereal outflow as a result of increased number of check points as well as double taxation both from Government and insurgents. Compared to January 2016, prices of most food imports (wheat flour, vegetable oil, sugar and rice) increased (11-28%) in Wajid, Bulo-Burto and Hudur, while they fell in Dinsor due to decrease in the prices of these commodities on international markets. Compared to one year ago, significant local cereal price declines (31-50%) were recorded in these markets apart from Hudur that recorded 19 percent increase in red sorghum prices. Similarly, annual comparison of imported food prices indicates declines in these markets apart from Dinsor where prices of all imported food items rose by 13-41 percent.

Since the beginning of the year, the ToT between daily labour (unskilled) wage and cereals remained unchanged in Bulo-Burto, declined in Hudur (by 3 kg/ daily labour wage) and increased (by 3-10 kg/ daily labour wage) in Wajid and Dinsor. Annual comparison indicates improved ToT (by 4-12kg/daily labour wage) in all the markets, except stable rates in Hudur. The increase in ToT is attributable to improved wage rates and reduced cereal prices.

RURAL

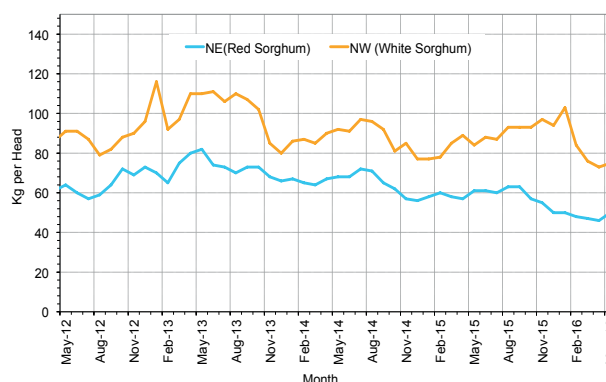
Northern regions

In the post-*Deyr* 2015/16, the food security situation in livelihoods of Northern regions varied from Minimal (IPC Phase 1) to Crisis (IPC Phase 3). In particular, food insecurity in the Guban Pastoral and Northwest Agropastoral was categorized in Crisis (IPC Phase 3), East Golis, Togdheer Agropastoral, Coastal *Deeh* and Northern Inland Pastoral were classified as Stressed (IPC Phase 2), while Hawd, Addun and West Golis were identified as Minimal (IPC Phase 1). The food security phases in most pastoral livelihoods were identified based on multiple indicators, such as improved own production (milk) in *Deyr* 2015, terms of trade between local quality goat and imported cereal (rice) as well as projections of near average to average *Gu* rains at the time of the analysis (January 2016).

Average to near average *Gu* rains have improved rangeland and water resources in some of northern livelihood zones. However, pasture and water conditions are below average/ poor in the areas with erratic *Gu* rains, including the regions of Northeast (Coastal *Deeh*, parts of NIP and Addun livelihoods), Sanaag (East Golis of Laasqoray and NIP of El-afweyn), Togdheer (localized parts of Hawd) and Sool (part of NIP and pockets of Hawd). The worst rangeland conditions are reported in parts of NIP and Coastal *Deeh* of Northeast, while extreme water shortage with early water trucking is reported in eastern part of East Golis of Qandala district. Livestock migration is normal in most northern livelihoods, apart from the above-mentioned rain-deficit areas where abnormal livestock migration is reported (see *Livestock sector*). Livestock body conditions are largely average to near average in most of the North (PET score of 3) due to improved pasture and migration options. However, body conditions of lactating animals and the livestock in the rain-deficit and drought-affected areas (NIP, Guban and Galbeed agropastoral) are still below average (PET score of 2). Medium to low kidding/lambing of goats and sheep occurred during this *Gu* season in parts of the northern rural livelihood zones. Low to medium camel calving is anticipated to start in late June and continue up to the end of August 2016 in most of the pastoral livelihoods in the North. Consequently, milk availability is expected to be near normal to normal in most areas, except the above-mentioned drought affected and poor precipitated areas.

In the agropastoral livelihoods of the Woqooyi Galbeed and Awdal regions, yellow maize and sorghum crops planted during the *Gu* season are well established and performing well due to above average *Gu* rains. Considering good crop establishment and the positive forecast of Karan rains (July-August) *Gu/Karan* harvest is like to be good. In Togdheer Agropastoral, the crop establishment is average in potential producing districts of Odweine, but below average in Burao due to below normal *Gu* rains. On the other hand, as a result of average rains and supportive flash floods, regeneration and production of natural grass fodder in Togdheer Agropastoral is fairly normal.

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



From January to May 2016, local quality goat prices declined in most of the Northwest markets, but exhibited marginal increase/ relative stability in most of the Northeast markets. Imported rice prices either declined marginally or remained stable across the markets. Reflecting these trends, the ToT between local quality goat and imported rice increased (less than 10%) in most of the Northeast regions. The exceptions are Garowe and Iskushuban where the ToT fell by 20kg/head and 6kg/head respectively primarily due to declined goat prices stemming from oversupply from drought-affected areas of NIP for repayment of debts. Conversely, in the Northwest markets, the ToT between local quality goat and imported rice declined moderately (12 -21%) apart from Zeylac market where it fell sharply by 53 percent as a result of significantly reduced goat price attributable to oversupply from drought-affected areas of Guban. Notably, only Burao market showed a marginal increase (6%) in the ToT. In May 2016, the ToT (goat/ rice) ranged from 58 to 108kg/head in the Northeast and from 36 to 71kg/head in the Northwest. The lowest ToTs were recorded in Zeylac (50-36kg/ head) and Erigavo (62-58 kg/ head) markets, which is a normal occurrence since 2012. The ToT between local quality goat and imported rice declined, on average, by 8-10 percent annually, across the northern regions.



Medium Lambing, Northern Inland pastoral, Qardho, Bari.
FSNAU, June 2016

In the Northeast, the ToT between local quality goat and red sorghum exhibited mixed trends in January-May 2016, gaining by 6 units in Bossaso market (62 kg/head) and losing 8 units in Garowe market (51 kg/head) as a result of increase in goat prices (8%) in the former and decrease (14%) in the latter (Figure 8). The differences in goat price trends are due to differences in the supply source for these markets. In the port city of Bossaso, livestock predominantly is supplied from Central and Hiran regions where livestock body conditions are better compared to Northeast (Garowe and Bossaso) due to better rains in last *Deyr* 2015 and current *Gu* 2016 seasons. In the Northwest, the ToT between local quality goat and locally produced white sorghum mostly declined due to increased sorghum price as a result of poor harvest over the past two seasons as well declined goat price. In May 2016, the ToT white sorghum/head value ranged from 43 kg/head (Zeylac market) to 102kg/head (Borama market). The ToT between local quality goat and local cereals declined annually by 11-17 percent on average across the northern regions.

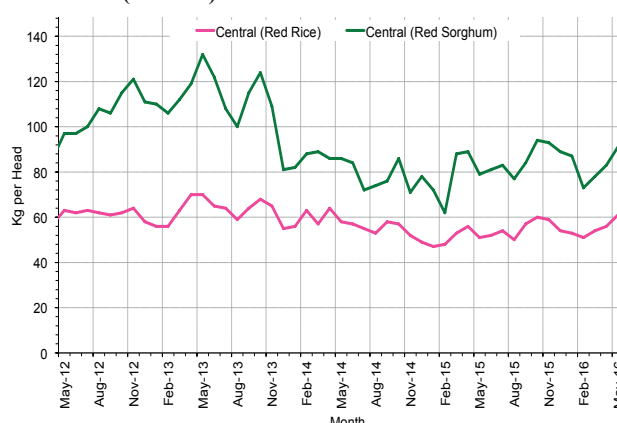
Central Regions

In the post *Deyr* 2015/16, Coastal *Deeh*, Cowpea Belt and Addun livelihoods of Galgaduud Region were classified as Stressed (IPC Phase 2), while Hawd, Addun livelihoods of Mudug Region and Southern Inland Pastoral (SIP) livelihood were categorized as Minimal (IPC Phase 1). This indicated a stable food security situation since *Gu* 2015, which is attributable to increased own production (milk and meat) and favorable purchasing power during post-*Deyr* 2015/16.

As a result of near average to average *Gu* 2016 rains, pasture, browse and water availability improved in large parts of Hawd and Addun livelihoods in Central regions. Exceptions are Cowpea Belt, Coastal *Deeh*, parts of Hawd and Addun (Dhusamareb district) and parts of Addun (Celbur, Hobyo and Adado districts) where pasture and browse are below normal to poor due to below average to poor *Gu* 2016 rains. While the rain-deficit areas have migration options to adjacent livelihoods in June / early July, they are likely to experience limited pasture and water availability as from mid-July. Currently, livestock migration is low in large parts of Hawd and Addun livelihoods, with the exception of the rain-deficit parts of the above-mentioned livelihoods/districts, where pastoralists migrated to nearby Hawd and Addun livelihoods.

Body conditions of all livestock species are average (PET 3) in most livelihood zones of central regions as a result of remnant dry pasture from last *Deyr* and existing migration options. Medium kidding/ lambing for goat/sheep occurred during the *Gu* season, while low camel birth rates are expected in June/July 2016 in accordance with the conception rates in the previous two rainy seasons (*Deyr* 2015/16 and *Gu* 2015). 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

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



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 2016 (4%) and last year (13%) and stable rates compared to five-year average. In the agropastoral parts of Central regions (Cowpea Belt), the cowpea crop is not performing well due to poor and erratic *Gu* rains. Thus, *Gu* harvest is likely to be poor or fail completely. In a normal season, the cowpea crop typically accounts for 60 percent of the total food production of poor agropastoral households with stocks normally lasting for about three to four months after the harvest.

In January-May 2016 period, the ToT between local quality goat and imported rice increased moderately (13 - 20%) both in the Hawd/Addun (from 55 kg/head to 62 kg/head) and the Coastal *Deeh*/Cowpea Belt (from 49kg/head to 59 kg/head) 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 Ramadhan period (June 2016). Similarly, the ToT between local quality goat and red sorghum increased in most markets of Central, with the highest ToT recorded in Abudwaq market (144 kg/head in May), exhibiting an increase of 14 percent from the beginning of the year primarily due to decline in the red sorghum price. Conversely, the ToTs have dropped in Haradhere and Galka'ayo markets from 95kg/head to 86kg/head and from 118kg/head to 108kg/head respectively due to increase in sorghum price. Compared to a year ago, the ToT between local quality goat and rice increased by 20 percent, on average, in central regions, while ToT between goat and red sorghum declined in Dhusamareb (from 61 to 50 kg/head) and Galkayo (144 to 108 kg/head) markets as a result of increased sorghum price (21- 50%). In contrast, ToT between goat and red sorghum rose significantly in the past 12 months in Abudwaq (from 100 to 144 kg /head) primarily due to increased goat price (51%) as well as in Eldher (from 53 to 102 kg/head) reflecting reduced red sorghum price (35%) and increased goat price (25%) [Figure 9].



Improved browse, Hawd pastoral, Dhusamareb, Gal-gadud, FSNAU, June 2016

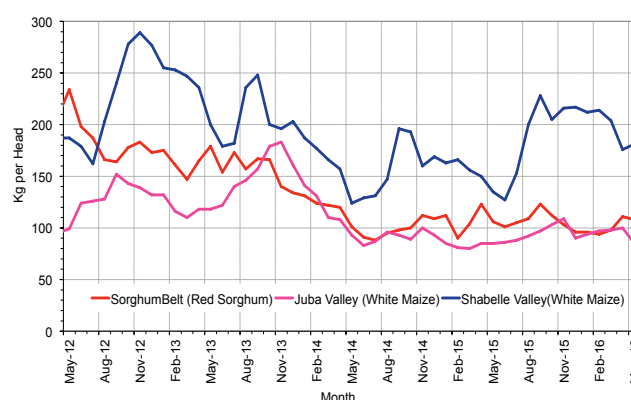
Southern Regions

In the post-*Deyr* 2015/16 (February-June 2016), the food security situation in most rural livelihoods of southern regions was classified as Minimal (IPC Phase 1) with the exception of the livelihoods of Riverine Gravity Irrigation in Middle and Lower Juba and Middle Shabelle regions, Southern Agropastoral and Riverine Pump Irrigation in Hiran, Southern Rain-fed Maize, Bay-Bakool Agro-pastoral Low Potential, Sorghum High Potential in Middle Juba and Coastal *Deeh*, which were classified as Stressed (IPC Phase 2). The projections for IPC classification were based on the assumptions of average/ below average *Gu* rains, normal off-season crop harvest, *Gu* 2016 farming activities, improved livestock production and cereal stock availability at household level in most of the farming areas.

The *Deyr* cereal stocks at poor households are already exhausted in most of regions of Somalia. However, the cereal supply is normal on the markets. *Gu* 2016 rains and interventions in support of farming activities (seeds, tractor hours, canal and catchment rehabilitations) have created job opportunities in *Gu* farming activities for poor households in the southern regions. As a result, daily labor wage rates increased in Middle Shabelle, Bakool and Gedo and remained stable in Bay and Juba regions in May 2016 compared to their levels in January .

The current outlook suggests a below average *Gu* 2016 cereal crop production. Specifically, poor rainfall, sudden cessation of rains in May and dry spell in June as well as localized floods (Hiran Beletweyne and Buloburte of Hiran and Johwar/Mahaday of Middle Shabelle) are likely to result in cereal harvest shortfalls in Lower Shabelle (agropastoral livelihoods of Afgoye, Coastal *Deeh* of Barawe (maize rain-fed), Wanla Weyne and riverine areas of

Figure 10: Regional Trend in Terms of Trade Cereal to Goat (South)



Afgoye, Merka and Qoryoley), riverine areas of Hiran and Middle Shabelle and agropastoral areas of Lower Juba, Middle Juba, Gedo, Hiran and Bakool. With fewer crops harvest and less income poor households in the affected areas will experience food shortages in a short-term. However, limited off-season harvest is expected in September-October from the flooded areas of Mahadey 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). While in the major cereal producing regions of Lower Shabelle and Bay the *Gu* harvest is likely to be below average, the cereal stocks are not expected to last up to the next *Deyr* harvest.



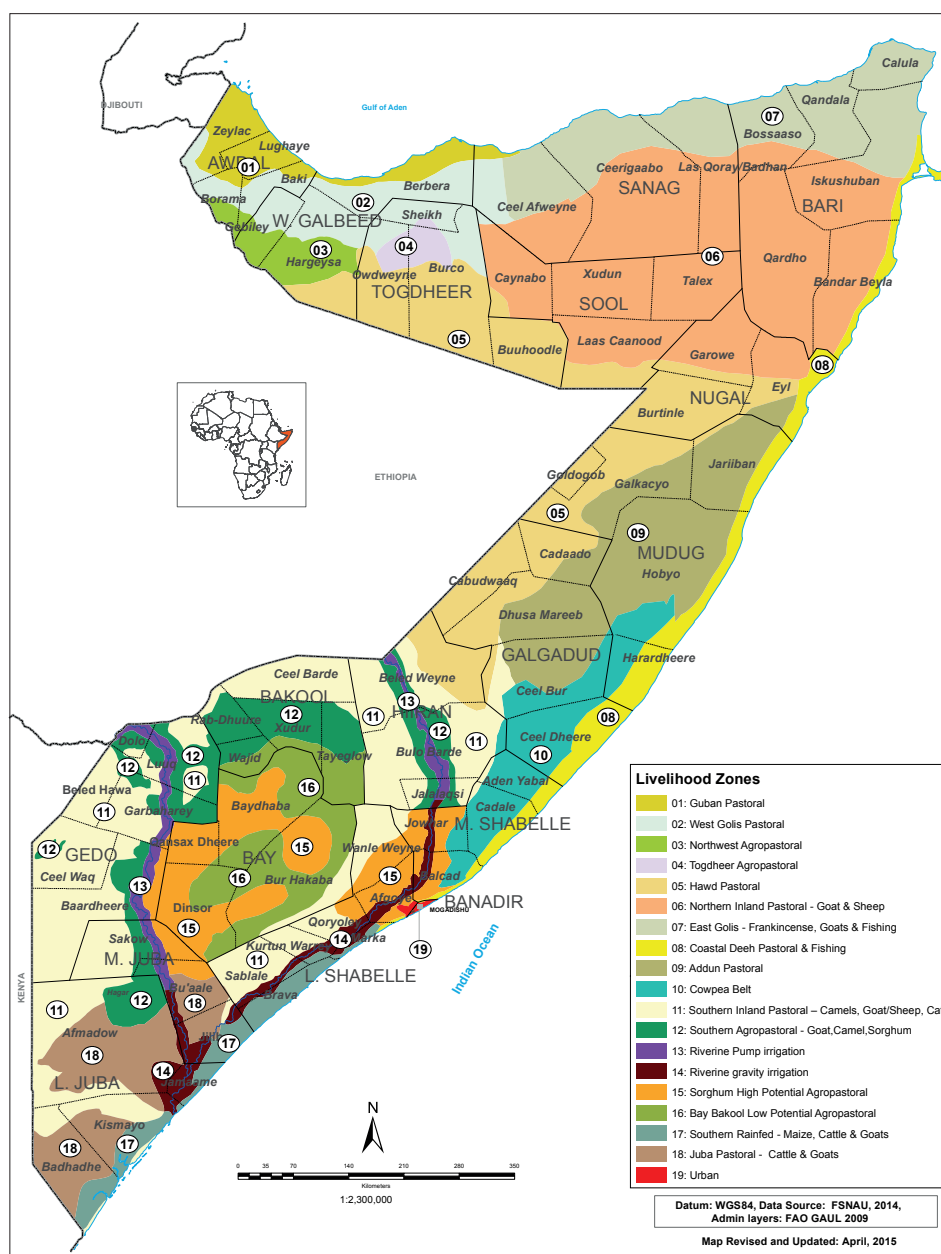
*Developed sorghum plant in Burdhuxunla, Wajid, Bakool.
FSNAU, June 2016*

On the other hand, the *Gu* 2016 rains have improved pasture condition, replenished water catchments and contributed to improved livestock body condition across most parts of the southern regions. During this *Gu* season conception was medium for sheep, goats and cattle in most areas but low to medium for camel. Milk availability is average as a result of average cattle calving. The milk yield of lactating camel has also improved due to good 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 created some job opportunities for poor households in riverine and agropastoral areas of southern Somalia. However, the purchasing power of poor households measured through ToT between daily labor wage rate and cereals decreased since January in Sorghum Belt regions (15%) and Shabelle (30%) and Juba (33%) due to decline in agriculture labour demand caused by unfavorable climate conditions. In May 2016, the highest ToT (20kg/ daily labour wage) was recorded in Bay region (20kg), while the lowest was in Middle Juba (4kg). Annual comparison of ToT shows a decreases in most regions, with a moderate decline noted in Shabelle (12%), Juba (20%) and the Sorghum Belt (21%) due to increased cereal price in anticipation of below-average harvest in the *Gu* season..

The ToT between local quality goat and cereals showed mixed trend in the Sorghum Belt regions between January and May 2016. It has increased in Hiran (11%) and Bay (50%) as a result of sustained livestock prices and/or decreased cereal prices; remained stable in Gedo and Bakool regions (Figure 10). However, the ToT fell in Juba regions (10%) as a result of decreased livestock price and increased maize price in anticipation of below-average harvest in the *Gu* season. Similarly, the ToT declined in Shabelle regions (15%) driven by an increase in maize prices. In May 2015, the lowest ToT was reported in Gedo (75kg/ goat) regions, while the highest ToTs were recorded in major cereal producing regions of Bay (279 kg/goat) and Lower Shabelle (200kg/goat). Annual comparisons show higher ToTs between local goat and local cereals in Bay (25%), Hiran (35%), Shabelle (34%) and Bakool (18%), but lower levels in Gedo (12%) and stable rates in Juba region.

SOMALIA LIVELIHOOD ZONES MAP



Recent publications and releases

- *West Golis Pastoral Livelihood Zone, Baseline Report, June 2016*
- *FSNAU Climate Data Update, May 2016*
- *FSNAU Market Data Update, May 2016*
- *Guban Pastoral Livelihood Zone, Baseline Report, May 2016*
- *FSNAU Nutrition Update, May 2016*
- *East Golis Frankincense, Goat and Fishing Livelihood Zone, Baseline Report, May 2016*
- *FSNAU Post Deyr 2015 Nutrition Technical Report, April 2016*
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