FSNAU
Food Security and Nutrition Analysis Unit - Somalia

Food Security & Nutrition

FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

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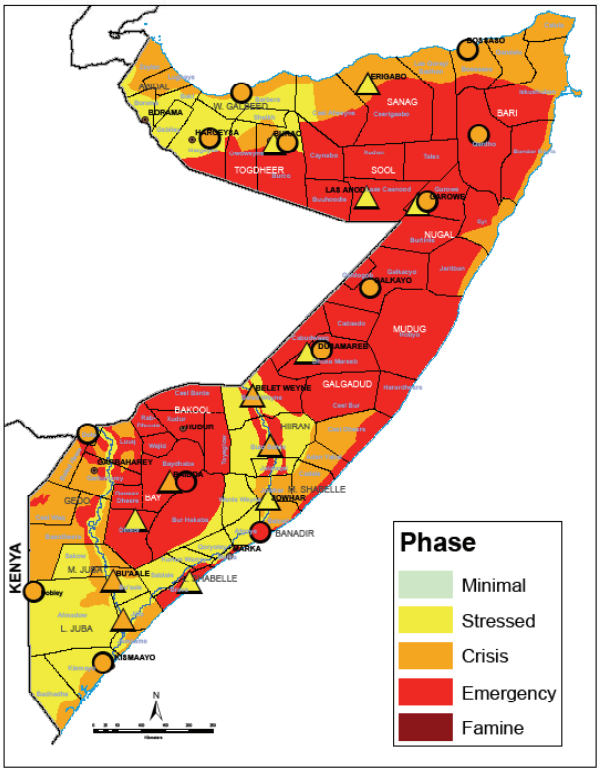
Quarterly Brief - Focus on Post *Gu* 2017 Season Early Warning

KEY ISSUES

Based on findings from rapid field assessments conducted by the Food Security and Nutrition Analysis Unit (FSNAU) in June 2017, current food security outcomes and humanitarian needs are expected to persist in most parts Somalia through the end of 2017 (Map 1 and Map 6). In some pastoral and agropastoral livelihoods which cover parts of Mudug, Galgadud, Gedo, Middle Shabelle and Lower Shabelle regions, food security outcomes are actually expected to deteriorate through the end of the year. A robust level of humanitarian assistance must be sustained as humanitarian needs are not expected to reduce significantly before the end of the year. The food security outcome shown on Map 1/Map 6 and described in the sections below do not reflect the potential impact of humanitarian assistance that may be provided during the projection period. However, if current level of humanitarian assistance is scaled back significantly and rising levels of morbidity and disease outbreaks are not controlled, Famine (IPC Phase 5) is possible in the worst affected areas.

Map 1: Most Likely Food Security Outcome, July-December 2017 (Preliminary)



Source: FSNAU/FEWS NET
This map represents acute food insecurity outcomes relevant for emergency decision-making, and does not necessarily reflect chronic food insecurity. For more information on this scale, please visit www.fews.net/FoodInsecurityScale.

- The Gu rains started late April and ended early in May instead of June in most of the country except Juba and some parts of Bay and Lower Shebelle, and the temporal distribution was erratic.
- Pasture and water condition improved in most of the parts of the north, Juba regions and large parts of Bay and Shebelle regions, while other areas pasture, browse and water are below average to poor, particularly most of central regions, large parts of the southern regions and parts of northern regions
- Livestock herd sizes have reduced substantially due to the impact of the prolonged drought and recovery is expected to take at least two consecutive seasons of good rainfall.
- As a result of below average Gu rains, pest infestation and reduced area cultivated, overall cereal production is expected to be 50-60 percent of average.
- Data from UNHCR indicates continuation of drought related displacement that started in November 2016. Between January and June 2017, an estimated 662 000 people (81% of the total displaced during this time period) have been displaced due to drought and drought related factors. The continuous arrival of newly displaced population have contributed to the worsening of food security and nutrition in IDP settlements such as Baidoa and Mogadishu.

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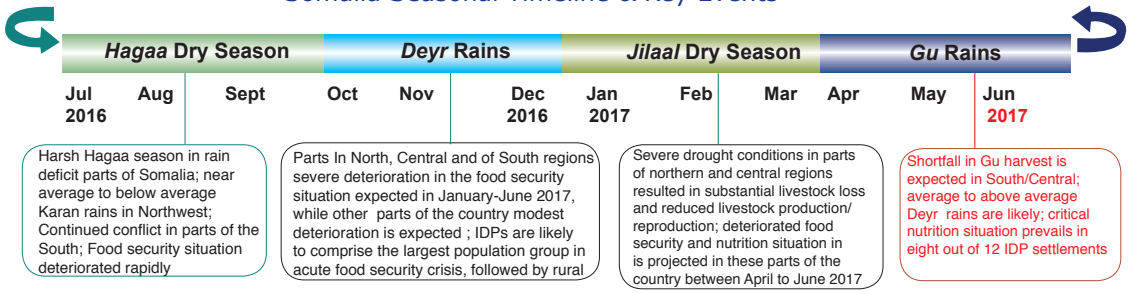
Somalia Seasonal Timeline & Key Events



- Results of nutrition surveys conducted by FSNAU indicate a Critical nutrition situation (Global Acute Malnutrition (WHZ) prevalence 15% or higher) in 9 out of 12 IDP settlements. The persistence of Critical levels of acute malnutrition in many IDP settlements and the current nutrition situation among Mogadishu and Baidoa IDPs indicate a deepening of the humanitarian crisis.

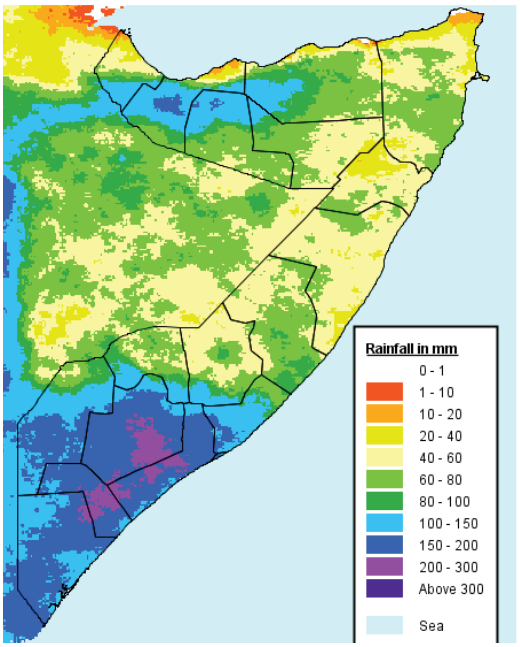
- Despite ongoing and scaled up efforts AWD/cholera outbreak in Somalia has not yet been brought under control. According to data obtained from the Ministry of Health and WHO covering the period from January 1 to June 18, 2017, a cumulative total of 53 015 suspected AWD/cholera cases and 795 deaths have been recorded across Somalia. The number of AWD cases and deaths this year represents a significant increase compared to the same period in 2016.

- Humanitarian assistance has been scaled up significantly between February and June, increasing from just over one million in February 2017 (equivalent to 36 percent of the number of people in IPC 3 or higher) to nearly 2.4 million in June 2017 (equivalent to 74 percent of the number of people in IPC 3 or higher). The scaling up is likely to have prevented further deterioration in the food security situation in well served areas. However, access to humanitarian assistance remains a challenge in many rural parts of central and southern Somalia.

SECTOR HIGHLIGHTS

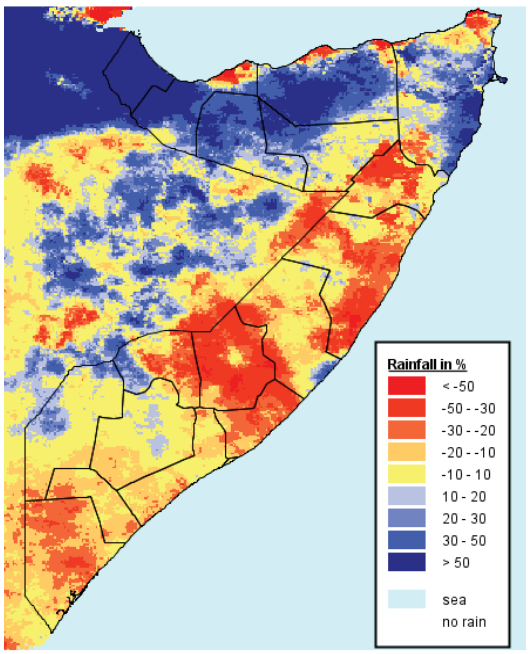
CLIMATE

Map 2: 2017 Gu (Apr-Jun) Actual Rainfall (in Millimeters)



Source: TAMSAT

Map 3: 2017 Gu (Apr-Jun) Rainfall Deviation from Normal (%)



Source: TAMSAT

The 2017 Gu (April-June) rains were delayed by one to two weeks, starting in the last dekad of April in most northern, central and some southern parts of the country. However, Gu rains started on time in parts of Lower Juba, Middle Juba, Lower Shabelle, Middle Shabelle and southern part of Gedo region. However, there has been a prolonged dry spell between mid-May and mid-June which affected crop and pasture development in most southern and central regions. On the other hand, localized areas in northern Somalia continued to receive rainfall through the end of June.

Rainfall Performance

In northern parts of the country, near average to above average rainfall performance in terms of amount, temporal and spatial distribution were reported in pastoral and agropastoral livelihood zones of Awdal and Woqooyi Galbeed (Maps 2 and 3), with the exception of Guban livelihood zone which remained dry as it only receives Hays rainfall in December and January.

Although the distribution was erratic, the amount of Gu rainfall was near average in pastoral livelihoods in Sool, Sanaag, Bari and Nugaal regions. Exceptions are parts of agropastoral of Togdheer, parts of Hawd of Toghdeer, Northern Inland Pastoral (NIP) of Sool region, parts NIP and parts of East Golis and Coastal Deeh livelihoods in Bari Region (El-afweyn, Caluula and Iskushuban districts), and eastern part of Addun livelihood of Nugaal Region that received below average rainfall.

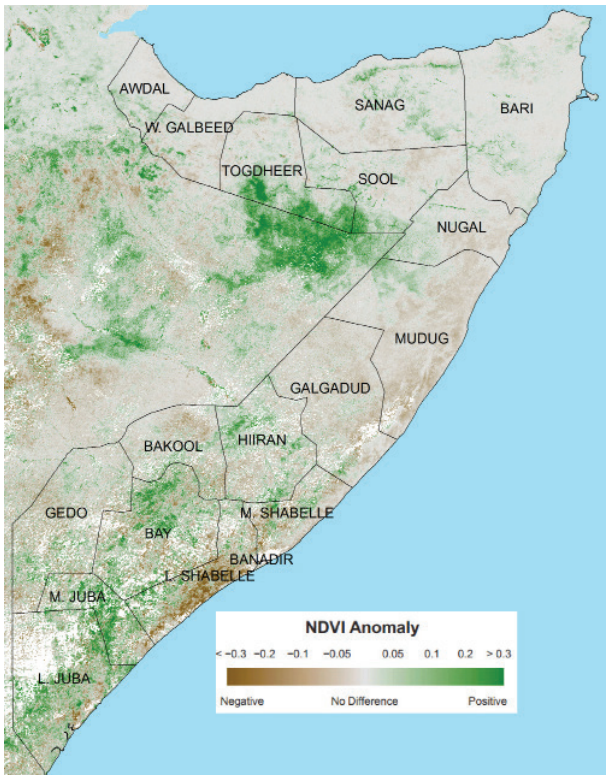
In central Somalia (Mudug and Galgadud Regions), rainfall performance was poor in most parts of Hawd, Addun and Coastal Deeh livelihood zones as rainfall delayed, erratic and below average in amount. In Cowpea Belt Agropastoral livelihood zone of Elder and parts of Haradhere and Ceel Bur Districts which received average to above average rainfall between late April and early May, this was followed by a prolonged dry spell during critical stage of cowpea crop growth and development.

In southern Somalia, rainfall performance was near normal in most agropastoral livelihood zones of Bay Region and near-normal to normal in most livelihood zones of Lower and Middle Juba region, Hiraan region and some parts of Lower Shablle Region (Sorghum Agropastoral of Wanlaweyn and Southern Inland Pastoral areas of Qoryoley). However, due to delayed start of Gu rainfall, short duration and erratic distribution, overall Gu performance is below normal to poor in most livelihoods of Bakool, Gedo, Lower Shabelle and Middle Shabelle Regions and in Southern Rainfed (maize) Agropastoral areas of Lower Juba Region.

The United States National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Centre (CPC)'s two-weeks forecast ending 24th of July indicates dry conditions prevailing in most parts of the country with the exception of Southern Inland Pastoral of Lower Shabelle region in the south and pocket areas in East Golis of Sanaag and Bari Regions in the north that will likely receive 20-80 millimeters of rainfall.

From late April to early May, the upstream Juba and Shabelle river waters rose due to above-average precipitations in the upper catchments of the two rivers in the Ethiopian highlands, but river levels remained below flood risk levels. An exception to this is a river breakage that occurred in Maandheere village of Balcad District of Middle Shabelle during early May, but there was minimal damage to crops. However, heavy rains in parts of Sorghum High Potential Agropastoral areas of Wanlaweyn District of Lower Shabelle resulted in flash floods in Warmahan and Buulo Hashi villages and destroyed hundreds of hectares of sorghum crops.

Map 4: Vegetation Cover/NDVI (21-30 June 2017)



Source: USGS

Vegetation Conditions

Analysis of vegetation cover based on NDVI (Normalized Difference Vegetation Index) indicates significant deterioration in vegetation conditions in Lower Shabelle, Bakool, and central regions despite improved vegetation conditions in localized areas in southern and northern regions. Varying degrees of deterioration in vegetation conditions are also observed across other parts of the country (Map 4).

Hagaa/Karan (Jul-Sep) and Deyr (Oct-Dec) Rainfall Forecasts

Multi-model rainfall forecasts from NOAA indicate a normal Hagaa season and a slight tilt in the odds to favor above-average rainfall during Deyr season over eastern Africa. In Somalia, the forecast normal to above average rainfall during Hagaa/Karan and Deyr could contribute to improved availability of pasture and water for livestock and improved conditions for crop cultivation.

CIVIL INSECURITY, DISPLACEMENT AND HUMANITARIAN ASSISTANCE

During the first half of 2017, civil insecurity in Somalia continued to impact food and livelihood security for both rural and urban populations in Somalia. There has been increased insurgent activity in Bari Region (Qandala and Bossaso) of Puntland in recent months. Recurrent clan conflicts over natural resource were reported in rural areas of Hiran (Belet-weyn), Sool (Lascanood) and Lower Shabelle Regions, resulting in causalities and restricting access to grazing land. The situation in Lower Shabelle is further complicated by insurgent activities. In Merka and surrounding villages, houses were burnt and livestock were either looted or killed. Other similarly affected villages include Canbanane, Janale and Gendawe (Marka District), Mubarak (Aw Dhegle District), and Km 50 (Afgoye District).

Population displacement has also continued in the first half of 2017 as a result of drought, insecurity, and other factors. Data from UNHCR indicates that an estimated 818 000 people were displaced between January to June 2017, including 662 000 people (81% of the total) who have been displaced due to drought and drought related factors.

Humanitarian organizations continue to face challenges in accessing rural areas in central and southern parts of Somalia due to poor road conditions and movement restrictions linked to road blockades, active hostilities and illegal taxation and extortions at checkpoints. Some urban areas in southern Somalia (Bulo Burto, Wajid, Hudur and Diinsor) continue to be impacted by trade disruption due to insurgent activities. In early July 2017, in Hiran Region, insurgents banned the use of Somali Shilling notes previously printed in Puntland and in circulation since 2013. This is causing disruption to most trading activities in the region. If sustained, this could lead to localized inflation and adversely impact food security among poor households.

Humanitarian assistance has been scaled up significantly between February and June, increasing from just over one million beneficiaries reached in February 2017, to 1.8 million in March, 2.7 million in April, 2.2 million in May and 2.4 million in June. Assistance was adequate to cover the equivalent of 36 percent of the number of people in IPC 3 or higher in February, 60 percent in March, 83 percent in April, 68 percent in May and 74 percent in June. While humanitarian assistance has not been adequate to cover total needs, the scaling up in recent months is likely to have prevented further deterioration in the food security situation in well served areas. However, access to humanitarian assistance remains a challenge in many rural parts of central and southern Somalia.

AGRICULTURE

The area planted under cereals crops for the current Gu season is below average in most of the crop growing areas in central and southern Somalia due to below average Gu rains and delayed river crest that limited irrigation possibilities. This is further compounded by moisture stress on crops and pest infestations that followed crop germination.

In Lower Shabelle, crop performance is below average both in agro-pastoral and riverine areas of Marka, Kurtun-warey, Sablaale and Barawa districts due to erratic distribution and early cessation of rainfall, insecurity, and early drop in river water levels which hampered irrigation of crops in riverine areas. Exceptions are Agropastoral areas of Wanl-aweyn and riverine areas of Afgoye and Qoryoley Districts where crop harvest prospects are near average. Generally, by mid-June, the established maize crop stages vary from vegetative, flowering and tussling stages, while sorghum is in between milking and maturity stages. Improved Hagaa rains from late June onwards may partially improve crop production prospects. Overall, below average Gu 2017 cereal harvest is expected in Lower Shabelle region in July/August.

Good condition Sorghum crop, Tufka, Dinsor, Bay, FSNAU, June 2017

In Bay region, Gu rainfall has generally been near normal and favorable since the beginning of April allowing for timely planting of the crops. Area planted under cereal crops is considered average. Many agro pastoral households have lost their livelihood and have been forced to migrate into IDP camps in Baidoa town and Mogadishu in search of humanitarian assistance and this has contributed to the overall reduction in the cultivated and cropped area during the current Gu season. Provision agricultural inputs as part of ongoing humanitarian assistance to vulnerable households across in Baydhabo and Bur-hakaba districts have contributed to increase crop cultivation in these districts. Because of high demand and profitability of cash crops,

large areas were planted with cash crops (groundnuts and sesame). The condition of the standing crops is considered normal, varying from tasseling to grain-filling stages.

As a result of poor amount, erratic distribution and early cessation of Gu rains, crop production prospects are either far below average or poor in agro pastoral livelihood zones of Hiran, Bakool, Lower Juba, Middle Shabelle and Gedo regions. Most of these agro pastoral livelihoods experienced failure of germination of planted crops, followed by severe moisture stress at early vegetative stages and during the critical stages of grain filling.

Riverine livelihood zones in Hiran, Lower Juba, and Gedo regions were also substantially affected by unfavorable rainfall and limited irrigation. Rains have generally been erratic and below average, with intervals of long dry spells which coincided with critical vegetative stage of crops. Cereal harvest prospects in these riverine areas are low. However, near average harvest is expected in riverine areas of Middle Juba Region and parts of Shabelle Region (Jowhar, Qoryoley and Afgoye Districts) due to relatively better rainfall and access to water for irrigation. Due to below average Gu rains and reduced irrigation possibilities along the Shabelle and Juba river basins, limited off-season maize harvest is expected in September-October 2017. Other crops (sesame, cowpea, vegetables etc.) are also expected to perform poorly. However, Haaga rains in July may improve production prospects somewhat in Shebelle and Juba regions.

In the Northwest Agropastoral livelihood zone, the 2017 Gu/Karan season cereal harvest expected in October-November is likely to be near average to average due to good Gu rains despite some agropastoral households selling part of their standing crops as fodder for livestock. However, Gu/ Karan harvest prospects will be conditional on the performance of Karan rains, which are currently projected to be near average. As a result of inadequate soil moisture, overall cereal production is expected to be below average in the agropastoral areas of Togdher region.

In the Cowpea Belt livelihood zone in central Somalia, total crop failure or insignificant cow pea harvest is expected as a results of poor Gu season rainfall.

Overall 2017 Gu cereal harvest across Somalia is expected to be 50-60 percent of normal (i.e. 40-50% below normal). In the major cereal producing regions of Shabelle and Bay, this will translate into up to two months of cereal stock among poor households. The harvest shortfall is expected to trigger an early start of the lean season and push cereal prices higher starting in August/September 2017.

Currently, cereals are available in most markets through supplies from carry-over stocks by wealthier farmers, commercial imports by traders and humanitarian food supply. However, due to expected below normal Gu harvest and low carryover stock from the poor consecutive harvests in the preceding two seasons, maize prices have increased between January and May 2017 in the riverine markets of Juba (18%) while maize prices are relatively stable in Shabelle due to relatively better harvest prospects compared to other regions. Similarly, sorghum prices increased in Hiran (41%), Central (46%), Bakool (15%), and Gedo (9%). Prices were relatively stable in the Northwest (+3%) and Bay (+4%), mainly as a result of large-scale humanitarian assistance in these areas. In May 2017, both maize and sorghum (white/red) prices showed substantial increases (30-98%) compared to levels observed a year earlier in most markets in southern and central Somalia. Maize and sorghum prices are also 32 to 70 percent higher than the recent five-year average in central and southern Somalia. Sorghum prices are also higher in Northern regions: 12-14 percent compared to last year and 23-27 percent compared to the five-year average for 2012-2016.

LIVESTOCK

Pasture, Water, Migration and body condition

Despite the late start and early cessation of Gu rains, pasture, browse and water conditions have improved during Gu 2017 rainy season in most pastoral and agropastoral parts of Somalia.

However, below average to poor pasture and water conditions persist in the northeast (parts of Coastal Deeh, Northern Inland Pastoral-NIP, East Golis and Addun livelihoods), Sanaag region (East Golis and NIP of El-afweyn, Cerigavo and Lasqoray), Togdheer region (localized parts of Hawd in Burao, Buhoodle and Odweyne), Sool region (part of NIP), Awdal region (large part of Guban) and localized area of Hawd of Hargeisa.

Improved pasture and body condition, Juba Cattle, Hagar district, FSNAU, June 2017

Similarly, below average Gu rains have affected pasture and water availability for livestock in central and southern regions: parts of Gedo and Bakool, coastal parts of Juba, Shabelle and central regions, Hiran agro pastoral, Cowpea Belt of central region/Middle Shabelle, parts of Juba pastoral cattle and large parts of Hawd and in central regions. As a result, earlier than normal depletion of pasture and water is likely to occur in these areas although this could be mitigated somewhat as a result of expected Hagaa rains in Shabelle and Juba in June/July.

Livestock which migrated from Sool, Sanag and Togdher regions to Galbeed agropastoral, Awdal and Coastal Deeh of Bari region have now returned following improvements in pasture and water conditions as a result of Gu season rainfall. Field reports indicate abnormal livestock migration from parts of Hawd and Addun livelihoods of central region to Nugaal, Sool and Togdher region. In most of the pastoral and agropastoral livelihood zones of the country, livestock body conditions have improved gradually from below-average (PET 2) to average levels (PET 3). Exceptions are parts of Guban in Awdal and Southern Agropastoral of Hiran, Gedo and Bakool regions where the body conditions of small ruminants and cattle are below average (PET 2).

Livestock reproduction (conception and birth) are low of all species in most of the pastoral and agro pastoral livelihoods. Calving/kidding and lambing are either very low or none, particularly in the drought affected areas of north, central and large parts of the southern regions due to high livestock deaths, low conception and high abortions during the prolonged drought. Milk production is low and milk is very scarce in most livelihoods due to none to low kidding/calving rates. Consequently, milk for consumption and sales is limited in most of the pastoral households and unlikely to improve before the Deyr (October-December) rainy season.

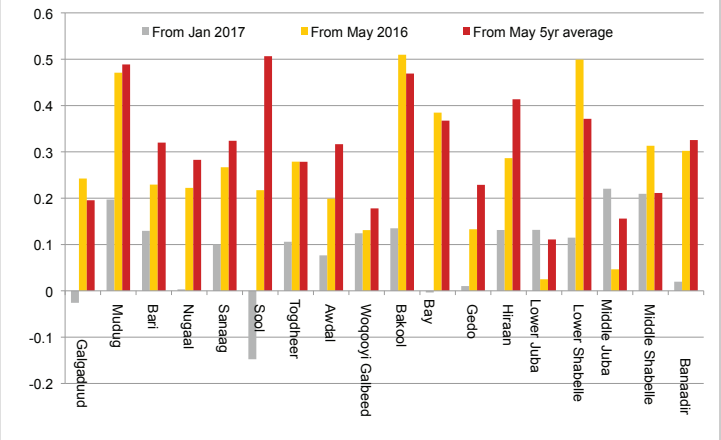
Livestock holdings and herd sizes among poor households have generally continued to decrease across all species (camel, cattle, and sheep/goat) through off-take including deaths. Though, the Gu rains have improved rangeland condition in many areas, the prolonged drought has already caused significant livestock losses. In southern Somalia, livestock losses are as high as 20-50 percent for sheep and goats, 20-40 percent for cattle and 20 to 30 percent for camel. Estimates of livestock losses for northern and central regions of the country are as high as 60 percent for sheep and goat and 40 percent for camel. As a result, many pastoral and agro pastoral households have become destitute and currently rely on humanitarian assistance and social support.

Due to substantial livestock losses, destitutions and reduced income from the sale of livestock and livestock products, food security among poor pastoral and agropastoral households is expected to remain precarious and only improve gradually.

Livestock prices

Livestock prices showed a mixed trend with moderate increases between January and May 2017 across most markets. The price of local quality goat increased in all markets in May 2017. The price increases in May ranged from 20 percent in Shebelle regions to 49 percent in central regions. The reported increase in livestock prices is attributed to improved livestock body condition, high demand associated with Ramadan festivities low supply due to limited sellable animals. Some pastoral households benefitting from humanitarian assistance have also been reluctant to sell their livestock, opting instead to preserve and rebuild their livestock assets which were depleted as a result of the prolonged drought. Local quality goat prices mostly indicate mild to moderate declines in central and southern Somalia compare to last year and the five-year average. However, local goat prices are higher in northwest (29%) and northeast (10%) compared to last year and 20 percent higher than the five year average for northwest markets (Figure 1).

Figure 1. May 2017 Local Goat Prices by Region: % Change



Primarily driven by improved livestock body condition, increased demand due to Ramadan festivities and low supply due to limited sellable animals, cattle prices increased in all markets of southern and the northwest regions in the first five months of the year: Juba (26%), Shabelle (23%), Sorghum Belt (26%) and northwest (16%). However, cattle prices

in May 2017 are lower compared to last year in Juba (21%), Shebelle (25%) and Sorghum Belt (33%). Cattle prices in May 2017 are also lower compared to the five-year average in in Juba (29%), Shebelle (29%) and Sorghum Belt (28%). On the other hand, cattle prices are higher in northwest regions compared to last year and five years average (21% and 22%, respectively).

MARKETS AND TRADE

Exchange Rate Trends

From January to May 2017, the exchange rate between the Somali Shilling (SoSh) and the United States Dollar (USD) showed a mixed trend in the SoSh-using areas of southern Somalia. SoSh showed mild appreciation of about 3-6 percent compared to between January and May, primarily driven by increased availability of USD in markets as a result of the ongoing humanitarian interventions. Year-on-year comparison indicates a stability in the exchange rate between SoSh and USD in southern Somalia.

In northern and central Somali Shilling using areas, the Somali Shilling depreciated by about 3-9 percent due to increased supply of new SoSh notes in the markets. Compared to last year (May 2016), there has been a significant exchange rate depreciation (12-20%) of SoSh against USD in central and northern regions as a result of increased supply of new SoSh notes this year. In the northwest, the Somaliland Shilling (SlSh) depreciated by 9 percent between January and May 2017 and by 18 percent compared to last year due to the lingering effect of increased local currency supply in the markets.

Cereal Imports and Commodity Price Trends

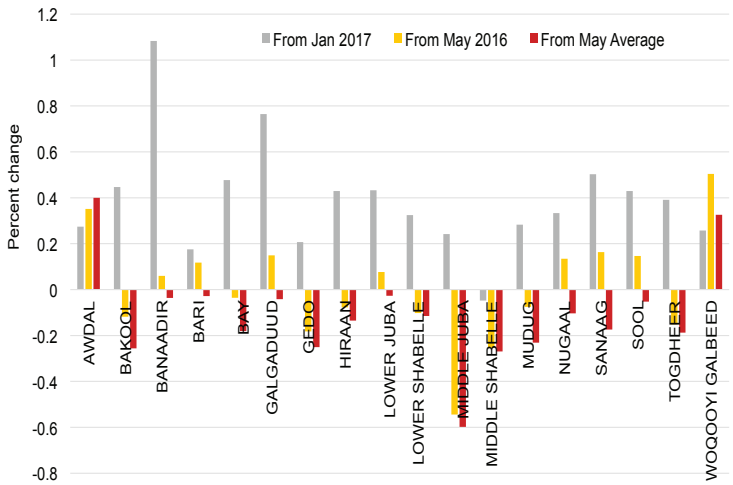
Between January and May 2017, the average prices of most essential imported commodities (rice, wheat flour, diesel, sugar, and vegetable oil) increased moderately in local currency terms across most reference markets in Somalia. In central and northern markets the increases were influenced by depreciation of the local currency against the US Dollar. In the south, Gu rains which impeded truck movements also contributed to the modest price rise, especially in distant inland markets. Increased demand during the Ramadan fasting period and festivities when most households typically purchase more imported food items have also contributed to price increments. Year-on-year comparison indicates mild to moderate price increases in central and north while imported food prices remain generally stable in southern regions. Imported commodity prices are generally near or below the five-year average prices in most reference markets of the country.

January to May 2017 cross border exports of sorghum and maize from Ethiopia to central and northern Somalia increased to 3 994 tones (37%) compared to the same period last year due to reduced local supply of cereal and relatively high price margins in northern and central Somalia which favored cross border traders. Since the beginning of the year, re-exports of rice, sugar and wheat flour from Somalia to Ethiopia and Kenya decreased by 7 percent.

Consumer Price Index (CPI)

From January to May 2017, the Consumer Price Index (CPI) for urban households, measured through changes in the cost of items in the Minimum Expenditure Basket (MEB), indicates moderate increases (5-10%) in the cost of the basket both in the Somali Shilling and Somaliland Shilling using urban areas of the country. This is attributed to atypical increase in the prices of sorghum that make up the bulk of the consumer basket. For the same reason, CPI is also significantly higher (16-33%) compared to last year in most parts of the country (Figure 2).

Figure 2. May 2017 Cost of Minimum Expenditure Basket (CMEB): % Change



NUTRITION

In June 2017, FSNAU conducted 15 integrated nutrition and food security assessments using SMART Methodology[1]. The assessment covered the 13 main settlements of Internally Displaced Persons (IDPs) across Somalia plus two urban areas in the south.

Results of the nutrition surveys conducted by FSNAU indicate a deterioration in the nutrition situation among IDPs in Baidoa, Hargeisa and Berbera. The nutrition situation is Critical (GAM ≥ 15%) in 9 out of 12 IDP settlements.

Table 1: Results of IDP and Urban Nutrition and Mortality Surveys Conducted in June 2017

Region	Population Group	Global Acute Malnutrition (GAM)	Severe Acute Malnutrition (SAM)	Crude Death Rate (CDR)	Under-Five Death Rate (U5DR)	Morbidity
W. Galbeed	Hargeisa IDPs	17.3	3.0	0.77	0.49	17.7
W. Galbeed	Berbera IDP	18.7	4.3	0.80	0.65	15.5
Toghdeer	Burao IDPs	9.2	1.5	0.85	1.11	25.2
Bari	Bossaso IDPs	18.6	4.7	0.56	0.59	35.0
Bari	Qardho IDPs	19.3	3.0	0.43	0.99	55.3
Nugaal	Garowe IDPs	19.9	4.9	0.35	0.75	33.4
Mudug	Galkacyo IDPs	21.6	4.1	0.07	0.00	5.7
Banadir	Mogadishu IDPs	20.4	6.6	1.55	4.61	45.7
Banadir	Mogadishu Urban	13.8	2.8	0.52	0.53	24.7
Bay	Baidoa IDPs	29.4	10.4	1.62	3.09	40.8
Gedo	Dolow IDPs	17.6	3.1	0.30	1.16	13.3
Lower Juba	Kismayo IDPs	11.3	2.2	0.33	0.62	24.5
Lower Juba	Kismayo Urban	13.1	2.3	0.45	0.50	34.6
Lower Juba	Dhobley IDPs	14.0	2.7	0.40	0.39	17.2

Source: FSNAU

The persistence of Critical levels of acute malnutrition persist in many IDP settlements and the current nutrition situation among Mogadishu and Baidoa IDPs indicate a deepening of the humanitarian crisis. GAM among IDPs in Baidoa nearly doubled (from 13.4% in Post Deyr in December 2016 to 15.9 percent in Post Jilaal in April 2017 and to 29.4% in Post Gu in June 2017) and Severe Acute Malnutrition SAM cases has also increased significantly from 3.0 percent in Post Deyr 10.4 percent in Post Gu 2017 after a slight reduction to 2.8 percent Post Jilaal in April 2017. Mortality results for Baidoa and Mogadishu IDPs reflect Critical to Very Critical levels of CDR and U5DR.

Serious nutrition situation (GAM 10.0-14.9%) is observed among IDPs in Kismayo and Dhobley and urban populations in Kismayo and Mogadishu. The nutrition situation is Alert (GAM 5.0-9.9%) among IDPs in Burao.

Levels of morbidity are also high (>20%) across most of the population groups surveyed and are likely one of the contributing factors for the high levels of acute malnutrition observed in these groups. Food security related factors (poor food consumption), high food prices, continuous arrival of a large number of new IDPs, limited employment opportunities due to increased competition, limited access to humanitarian interventions, increased destitution due to drought, AWD/cholera, measles outbreak, low immunization coverage, are considered the main contributing factors for the reported high levels of acute malnutrition among IDPs.

Data obtained from the Nutrition Cluster indicate substantial increase in new admission of acutely malnourished children to treatment and feeding centers since the beginning of the year, from 28 600 in January to 52 200 in February, 94 300 in March, 59 400 in April and 97 600 in May. There have been sharp increases in May in several regions, including in Banadir//Mogadishu, Bay, Mudug, Galgadud, Bari and Hiran, in part reflecting the deteriorating nutrition situation in these regions.

Despite ongoing and scaled up efforts AWD/cholera outbreak in Somalia has not yet been brought under control. According to data obtained from the Ministry of Health and WHO covering the period from January 1 to June 18, 2017, a cumulative total of 53 015 suspected AWD/cholera cases and 795 deaths have been recorded across Somalia. Of the total number of AWD cases, the largest proportions were identified in Bay (28%), Lower Shabelle (10%), Banadir (10%) and Geod (10%) regions. While the overall AWD Case Fatality Rate (CFR) is 1.5 percent, it is significantly higher in some regions: Bakool (4.1%), Sanaag (2.0%), Toghdeer (1.9%) and Banadir (1.9%). The number of AWD cases and deaths this year represents a significant increase compared to the same period in 2016.

1 Standardized Monitoring and Assessment of Relief and Transitions (http://smartmethodology.org)

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

Between January and May 2017, the Cost of Minimum Expenditure Basket (CMB) exhibited mixed trends. CMB remained stable or changed at mild rates (less than +/-5%) in Nugaal, Bay, Gedo, Banadir and Galgaduud. However, moderate (8-22%) increases were noted in other regions due to increase in cereal (red sorghum) prices, except in Sool region where CMB declined by 15 percent, owing to improved water availability and declining water prices as a result of the Gu rains. However, comparison with last year (May 2016) and the five-year average indicate moderate to high increases in the CMB for May 2017.

Casual labour wage, which is a major income source among the urban poor, remained stable or changed (+/-) at mild rates in most of northern and central regions between January and May 2017 (Figure 7). However, casual labor wages increased (12-34%) in southern regions as a result of the improved agricultural activities in the surrounding rural areas, increased trading and related activities in the urban areas. Nevertheless, annual comparison shows a mixed trend, with declines (11-55%) in Middle Juba and Banaadir/Mogadishu, due to high competition arising from the large influx of new IDPs and migrants from drought affected regions. In other regions, labor wages either remained stable or changed at mild rates (less than +/- 10%) compared to last year. On the other hand, compared to the recent five-year average, casual labor wages have shown declines in most regions although moderate (19-22%) increases were noted in Middle Shabelle and Lower Juba Regions.

Figure 7: Regional Trend in Terms of Trade Cereal to Labour (Central and North)

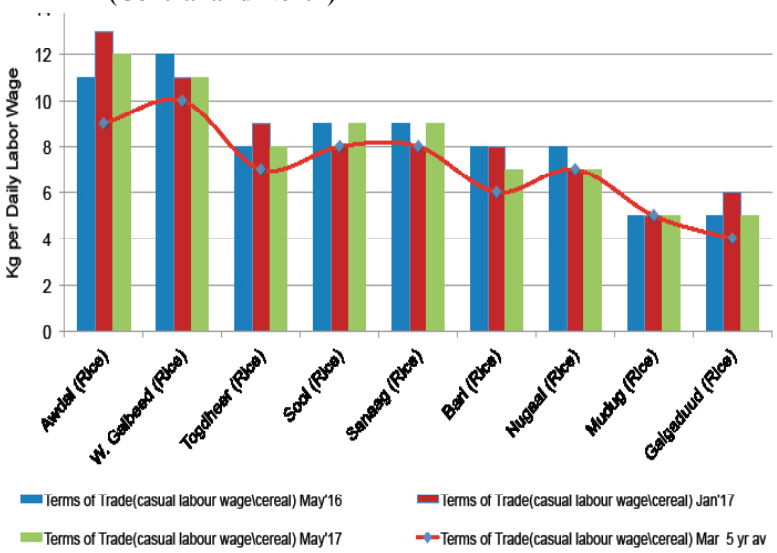
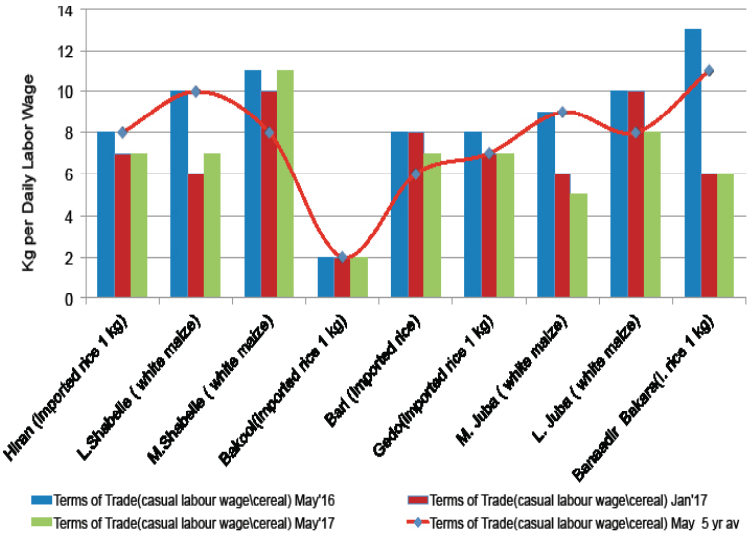


Figure 8: Regional Trend in Terms of Trade Cereal to Labour (South)



The Terms of Trade (ToT) between daily labour (unskilled) wage and cereals, which approximates the purchasing power of the urban poor, either remained relatively stable or changed at mild rates (+/- 1 to 2 kgs of cereals/ daily labour wage) between January and May 2017 (Figure 8). However, lower TOT were observed across most of the southern regions of the country compared to last year as well as the five-year average, due to increase in cereal prices and/or declines in labour wages; while northern and central regions recorded relatively stable ToT.

In urban areas in southern Somalia affected by trade disruptions due to conflict (Buloburto, Wajid, Hudur and Dinsoor), daily labour wage rates increased between January and May 2017, primarily due to increased activities resulting from increased humanitarian interventions and seasonal agricultural employment opportunities in the surrounding rural areas. Annual comparison indicates mixed trends with declines in Wajid (8%) and Dinsor (20%) and an increase in Hudur (115%). ToT between daily labour wage and imported rice indicates relative stability in these towns both compared to January 2017 and last year (May 2016).

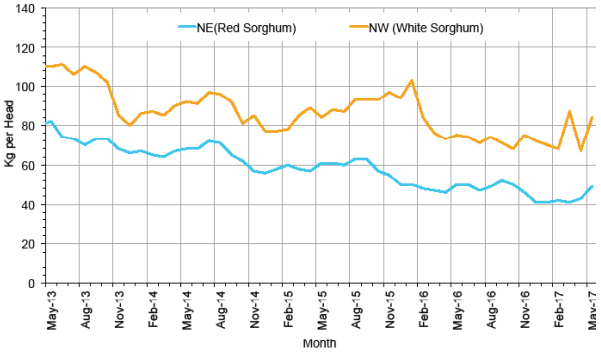
Due to high food prices, declining labor to cereal terms of trade and increased competition for labor employment due to population migration and displacement from rural areas, current food security outcomes are not expected to improve in most urban areas across the country between now and the end of the year.

RURAL

Northern regions

Average to above average *Gu* rains in some sections of the northwest and near average to average Gu rains in localized areas in the northeast have improved rangeland and water resources in some parts of livelihood zones in northern parts of the country. However, pasture and water conditions are below average or poor in the areas that experienced erratic *Gu* rains, including the regions of Coastal *Deeh*, parts of Northern Inland Pastoral (NIP) and Addun livelihood zones in Bari and Nugaal regions, East Golis livelihood zone of Laasqoray and NIP of El-afweyn in Sanaag, localized parts of Hawd livelihood zone in Togdheer and part of NIP and pocket areas of Hawd livelihood zone in Sool region.

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



The worst rangeland conditions are reported in parts of NIP livelihood zone, and Coastal *Deeh* of Bari and Nugaal, 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 livelihood zones, apart from the above-mentioned rainfall-deficit areas where abnormal livestock migration is reported (*see Livestock sector*). Livestock body conditions are mostly average to near average (PET score of 3) in most northern regions due to improved pasture and migration options. However, body conditions of lactating animals and the livestock are still below average (PET score of 2) in areas affected by sustained drought conditions (Guban and NIP). Low to medium kidding/lambing of goats and sheep occurred during this *Gu* season in parts of northern rural livelihood zones. Low to medium camel calving is anticipated to start in late June and continue up to the end of August 2017 in most of the pastoral livelihoods in the north. Consequently, milk availability is expected to be near normal to normal in most areas starting in July, except in affected by sustained poor rainfall as highlighted above (Figure 9).

In 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 average to above average *Gu* rains. In Togdheer Agropastoral, the crop establishment is average in cereal producing districts of Odweine, but below average in Burao due to below normal *Gu* rains. If Karan rains (July-August) perform well, the overall *Gu/Karan* harvest in the northwest is like to be near average. Regeneration and production of natural grass fodder in Togdheer Agropastoral is expected to be below normal due to the early cessation of Gu rains.

Migration of returnee fron Coastal Deeh of Bari to NIP FSNAU, June 2017 (Northern regions)

From January to May 2016, local quality goat prices declined in most of the northwest markets, but exhibited marginal increase or relative stability in most of the northeast markets. Imported rice prices either declined marginally or remained stable across most northern markets. Reflecting these trends, the ToT between local quality goat and imported rice increased at mild rates (less than 10%) in most of the northeast regions. Exceptions are Garowe (Nugaal) and Iskushuban (Bari) where ToT declined by 20kg/head and 6kg/head, respectively, primarily due to lower goat prices stemming from oversupply in these markets from drought-affected areas of NIP as pastoralists started repayment of previously accumulated debts. A similar trend is observed in the northwest where the ToT between local quality goat and imported rice declined moderately (12-21%); the declines in TOT in Zeylac market of Awdal Region was much more significant (53%). It is only Burao market of Togdheer which registered a marginal increase (6%) in ToT. The ToT between local quality goat and imported rice declined, on average, by 8-10 percent across the northern regions compared to last year (May 2016).

In the northwest, the ToT between local quality goat and locally produced white sorghum in the northwest regions mostly declined due to increased sorghum price as a result of poor harvest over the preceding two seasons as well lower current goat prices. The ToT between local quality goat and local cereals declined by 11-17 percent on average compared to last year across the northern regions.

Despite improvements in rainfall performance in the parts of northwest and northeast livelihood zones, current food security outcomes are expected to persist through the end of the year as a result of lingering impacts of below-average harvest and livestock losses and unfavorable terms of trade and increased food prices. However, the number of people in Crisis (IPC Phase 3) and Emergency (IPC Phases 4) is expected decrease slightly towards the end of the year, following the Gu/Karan harvest and the peak of the forthcoming Deyr rains.

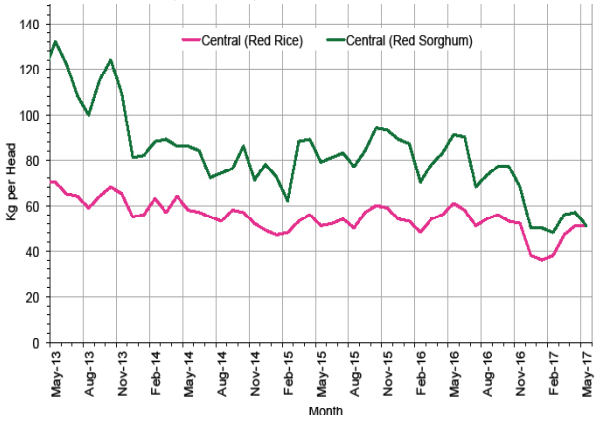
Central Regions

As a result of below average to poor Gu 2017 rains, pasture and water availability are poor in Hawd, Addun, large parts of Coast Deeh and Cowpea Belt livelihood zones in central regions. Exceptions are parts of Cowpea Belt (Celdher and Celbur Districts) and Coastal Deeh in Celdheer District where better rainfall contributed to improved pasture and water for livestock. However, large influx of livestock from adjacent livelihood zones that were affected by continued drought conditions have caused early depletion (from late May to early June 2017) of pasture/browse and water in the better rained areas. There has also been atypical and substantial livestock outmigration from Hawd and Addun pastoral livelihood zones of central regions to neighboring regions of Hiran, North Mudug, Sool and Togdher Regions, and to Ethiopia in late May and early June 2017. The overall body conditions of all livestock species are below average (PET 2) for large ruminants and near average for small ruminants in most livelihood zones of central regions, due to limited availability of pasture and water through May. Livestock reproduction and production levels for all species are extremely low due to prolonged drought conditions and poor rainfall during the current Gu season. Kidding/lambing and calving for small ruminants and camel are nonexistent, as very few animals conceived during the preceding season.

Poor body condition, Addun, Adado district, FSNAU, June 2017

In the agropastoral Cowpea Belt of central regions, cowpea crop is not performing well due to poor Gu rains. There was successive germination failure and replanting in most of the Cowpea Belt. In large parts of Haradhere and Hobyo Districts, cowpea crops have already wilted or completely failed due to moisture stress. Whereas well established cowpea crops were reported in Celdher District and localized areas of Celbur District due to relatively better rainfall received during the Gu season.

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



Cowpea production normally contributes to three to four months of food supply among poor agropastoral households. The 2017 cowpea harvest in central regions is expected to be low and significantly below average, with total crop failure expected in the worst affected areas.

During the January to May 2017 period, the ToT between local quality goat and imported rice increased significantly from 37 kg/head to 52 kg/head in Hawd and Addun livelihoods and from 34kg/head to 48 kg/head in Coastal Deeh and Cowpea Belt livelihood zones of central regions. These trends are attributable to significant increase in goat prices (49% combined central markets) as a result of the start of increased demand by traders for Ramadan and Eid festivities (June 2017) as well as limited supply due to substantial livestock losses (offtake and deaths estimated to be

as high as 40 to 60 percent) sustained during the prolonged drought. However, these increases in TOT reflect short term improvements in ToT since the beginning of the year. Goat to rice TOT are still lower compared to last year (18%) and the five-year average (19%) due to lower prices this year (Figure 10).

Due to substantial livestock losses, continued drought conditions, exacerbated by poor Gu season rainfall, and poor cowpea harvest prospects Hawd and Addun livelihood zones of central regions are expected to remain in Emergency (IPC Phase 4) and Crisis (IPC Phases 3) with potential increases in the number of people in both of these phases. As a result of deteriorating food access conditions, Coastal Deeh livelihood of central region is expected to deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) between July and December 2017.

Southern Regions

Improved access to seasonal farm labor opportunities in riverine and agropastoral livelihoods, increased livestock prices and milk availability in rural areas particularly in Shabelle and Juba regions as well as ongoing humanitarian intervention in accessible rural drought affected areas and among displaced populations have helped to prevent further deterioration in the food security situation in southern regions. However, Gu season cereal harvest is expected to be below average in most agropastoral and riverine areas of southern Somalia. The concern areas are pastoral and agropastoral livelihoods of Hiran, Bakool, Gedo, coastal areas of Shabelle and Lower Juba Regions and Bay Region where a large number of rural households have already become destitute and moved to IDP camps in urban areas.

Findings from the preliminary assessment indicate that the 2017 Gu 2017 cereal harvest in southern Somalia is likely to be about 50-60 percent of normal Gu season production. This is attributed to the late onset and early cessation of Gu rains in most regions, irrigation constraints, insect infestation and insecurity. The major cereal producing regions of Lower Shabelle and Bay, which normally contribute approximately 60-70 percent of the total cereal production in southern Somalia are among the most affected. However, projected average to above average Hagaa rains, which have already started in large parts of Juba regions may alleviate the pressure of moisture stress and slightly improve cereal production prospects in in Juba and Shabelle regions and adjacent areas in Bay region.

Good condition maize, Jowhar, Middle Shabelle, FSNAU, June 2017

Seasonal wage labor employment is an important income source among poor households in rural parts of southern Somalia. Gu season agricultural activities and agricultural input support (seeds, tractor hours, canal rehabilitation etc.) have created improved wage labor employment opportunities and are among the factors that have contributed to prevent further deterioration of the food security situation in southern regions. Between January and May 2017, agricultural daily labor wage rates have improved in Bay (62 %), Shabelle (91%) and Hiran (11%) Regions in May 2017 compared to January. However, the purchasing power of poor households measured through ToT between daily labor wage rate and cereals were stable in Sorghum Belt and Shabelle livelihoods between January and May but declined in Juba regions. TOT are significantly lower compared to a year ago (30% in Shabelle and Juba and 46% in Sorghum Belt) as a result of cereal prices that remain well above average.

Cereals are available in most local markets as a result of increased supply from carryover stocks held by wealthier farmers, commercial imports as well as ongoing humanitarian food distributions. However, overall supplies remain low and this can be observed from cereal prices in May 2017 which have more than double compared to year ago (see agriculture section). As a result of increases in food prices and reduced income from crop, livestock and labor, the cost of living remains high, reducing purchasing power and limiting food access among market-dependent populations, particularly poor rural households. The situation is particularly acute in Gedo, Bakool, Bay and Hiran Regions due to poor consecutive crop harvests, volatile security situation, restricted trade and economic activities and limited access to humanitarian assistance outside of the main cities.

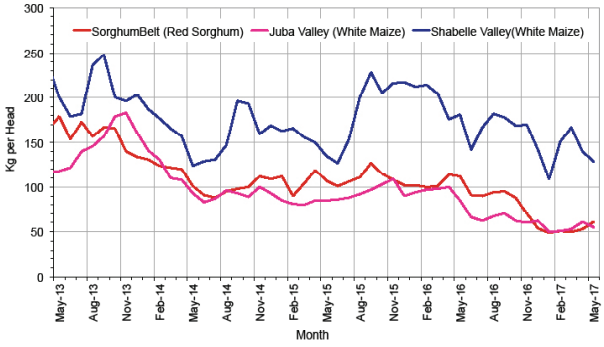
The Gu rains to some extent mitigated the impact of the prolonged drought on pastoral communities as water and rangeland resources started to improve. Water prices that reached record highs during the dry Jilaal (January-March)

season started to decline following the start of the Gu rains in April. This has also led to resumption of normal livestock migration patterns in most parts of southern Somalia. Reduced expenditure on water, livestock feed costs and migration costs (motorized transport of animals to distant grazing areas) have declined considerably, thereby alleviating some of the economic pressure on rural households, especially the poor. However, poor pastoralists continue to cope with high/rising food prices. This is exacerbated by significant livestock losses sustained during the prolonged drought.

Livestock body conditions have also improved in most pastoral areas (PET score 2-3) of southern Somalia. However, water and pasture conditions are expected to deteriorate faster than normal in some livelihood particularly rain deficit areas. Livestock production and reproduction are expected to be low. Livestock kidding/calving rates were low to none for goat/sheep and cattle and milk availability is below average to poor in most livelihoods. This is mainly due to low conception rates and abortions in previous seasons as a result of the prolonged drought. Livestock holding, particularly small ruminants and cattle are expected to continue deteriorating in the coming months in all pastoral and agro pastoral livelihoods of Hiran, Bakool, Gedo, Lower Juba, Middle Shabelle and coastal areas of Lower Shabelle, although herd size trend will most likely remain near baseline or at baseline levels in other areas (most of Juba and Shebelle regions).

The ToT between local quality goat and cereals showed an increasing trend in the Sorghum Belt (24%), Shabelle (18%) and Juba (10%) regions between January and May 2017, primarily driven by increases in livestock prices. However, terms of trade between local goat and local cereals show drastic reduction in Bay (58%), Hiran (60%), Middle Juba (69%), Bakool (54%), Lower Shabelle (31%), Gedo (38%) and Lower Juba (14%) compared to last year (May 2016). This unfavorable TOT which reflects substantial erosion in the purchasing power of pastoralists, due to sustained above-average cereal prices and below-average livestock prices that resulted from the drought conditions experienced this year (Figure 11).

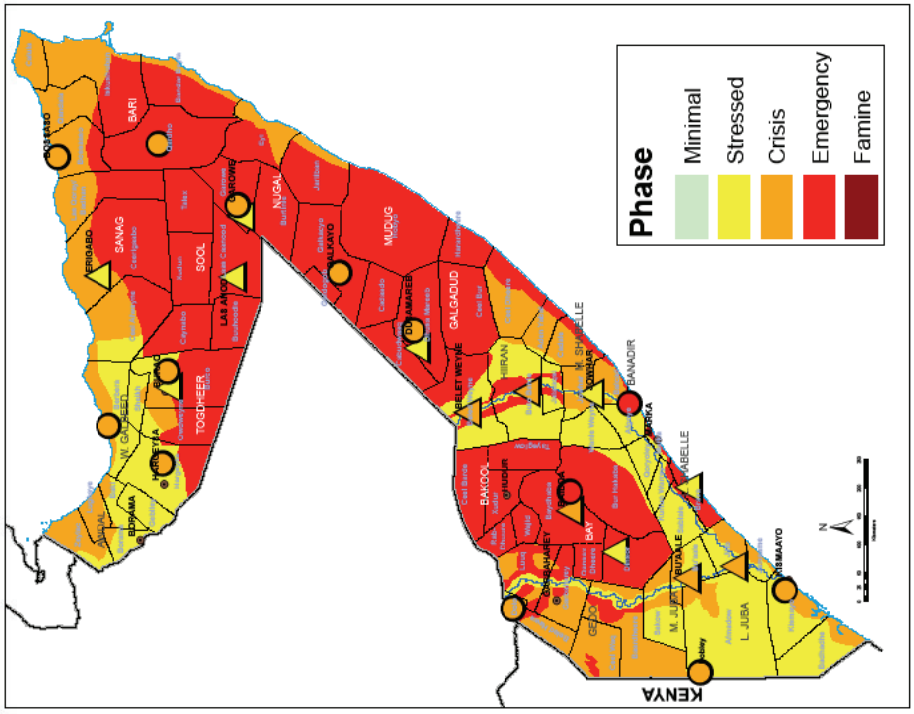
Figure 11: Regional Trend in Terms of Trade Cereal to Goat (South)



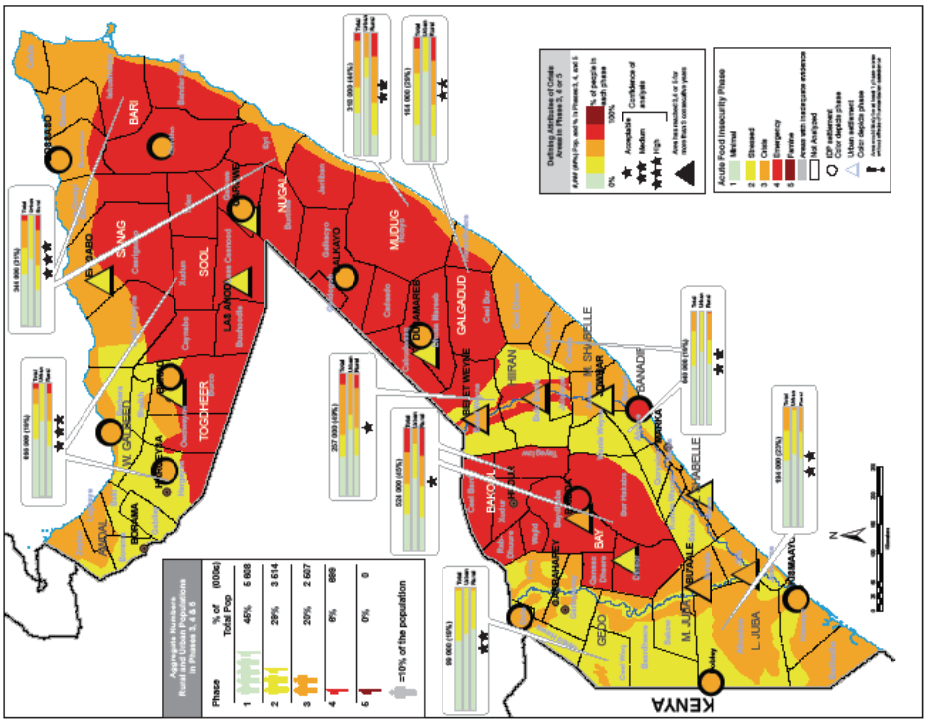
The impact of sustained drought conditions is expected to lead to deterioration of food security outcomes in some rural livelihoods in southern Somalia. Accordingly, Southern Inland Pastoral (SIP) livelihood zone of Gedo region is expected to deteriorate from Stressed to Crisis between now and the end of the year. Similarly, Southern Agropastoral livelihood zone of Gedo region and Southern Rain-fed Maize Agropastoral livelihood of Middle and Lower Shabelle livelihood zone are expected to deteriorate from Crisis to Emergency through the end of the year.

The food security outcome shown on Map 1/Map 6 and described in the foregoing sections do not reflect the potential impact of humanitarian assistance that may be provided during the projection period. However, if current level of humanitarian assistance is scaled back significantly and rising levels of morbidity and disease outbreaks are not controlled, Famine (IPC Phase 5) is possible in the worst affected areas.

Map 6: Most Likely Food Security Outcome: July 2017 Update (Preliminary)



Map 5: Most Likely Food Security Outcome: April-June 2017 (Issued in May 2017)



Recent publications and releases

- *FSNAU Post - Gu Food Security and Nutrition Analysis Technical Report, October 2016*
- *FSNAU 2016 Post - Gu Nutrition Technical Report, December 2016*
- *FSNAU Nutrition Update December, 2016*
- *FSNAU/FEWS NET Joint Somalia Food Security Outlook, February-September 2017*
- *FSNAU Climate Update, May/june 2017*
- *FSNAU Market Update, May 2017*
- *FSNAU 2016 Somali Infant & Young Child Nutrition (IYCN) Assessment Report*

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