

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

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KEY ISSUES

Based on the results of the rapid preliminary *Gu* season field assessment carried out in May-June 2013 and continuous monitoring of food security and nutrition situation, Food Security and Nutrition Analysis Unit (FSNAU) projects that **most rural livelihoods will be classified as *Stressed* (IPC Phase 2) based on the Integrated Phase Classification (IPC) severity scale of acute food insecurity in the post *Gu* period (July-December 2013)**. However, some deterioration of the food security situation is expected in Hiran Agropastoral and flood affected riverine areas in Jowhar (Middle Shabelle). A slight deterioration is also likely in parts of pastoral livelihoods in Mudug and Bari regions (Coastal *Deeh*, Sool Plateau and Dharor valley). The deterioration in these areas is mostly attributable to poor performance of *Gu* rains, which affected pasture availability and crop performance. However, livestock migration options exist given overall good rainfall performance in most areas, which may alleviate the situation in the pastoral livelihoods. Conversely, poor households' access to food in Hiran Agropastoral will be affected by a likely poor crop harvest.

Malnutrition trends obtained through FSNAU Health Information System indicate stable or improved situation in southern Somalia and in Northwest but a deteriorated situation in Hawd livelihood of Central and Northeast regions. However, **existing aggravating factors such as diarrhoea, malaria and cholera (South), can easily worsen the nutrition situation**. In the past year, the nutrition situation has been gradually improving mostly due to the improved food security situation in the country.

Gu cereal crop production is expected to be below average, mostly due to likely lower than normal cereal production in major crop producing regions of Lower Shabelle and Bay. *Gu* rains started slightly earlier than usual (in late March), and were of moderate to above average intensity in the beginning of the rainy season. However, flash and river floods in April-May, early cessation of the long rainy season, insect infestation and prolific weeds in the agricultural areas of Somalia will likely lead to below average crop harvest. In Lower Shabelle, the expected below average cereal crop production is also due to increased cultivation of more profitable sesame compared to maize in this *Gu* season. Nevertheless, projected average *Hagaa* rains, which normally precipitate in coastal areas of Juba and Shabelle regions and often reach parts of Bay region, will increase off-season crop harvest opportunity and is likely to bring the overall *Gu* cereal production to near average. The anticipated average *Karan* rains will facilitate the normal proceeding of the planting season in the Northwest with the major harvest (*Gu-Karan*) to be collected in November.

In the context of existing cereal production outlook, normal port functioning and continued humanitarian access, the cereal price movements are likely to exhibit seasonal fluctuations. This trend is unlikely to have major impact on the purchasing power of market dependent populations, including urban, internally displaced persons and pastoralists.

Most pastoral livelihoods are likely to see improvements in the food security situation due to the positive effect of *Gu* rains on rangeland and water conditions leading to improved milk yields of lactating animals. Pastoralists will benefit from anticipated increase in livestock sales during upcoming *Ramadan* (July) and *Hajj* (October) festivities. As a result, pastoral food security outcomes will likely improve through December, including in Guban pastoral livelihood, which is currently classified as in *Crisis* (IPC Phase 3). The likely improvement in Guban is due to livestock recovery as a result of good off-seasonal *Gu* 2013 rains and ongoing humanitarian assistance. However, coastal areas of the central and northeastern regions will likely face a slight deterioration in food security due to anticipated decline in livestock production.

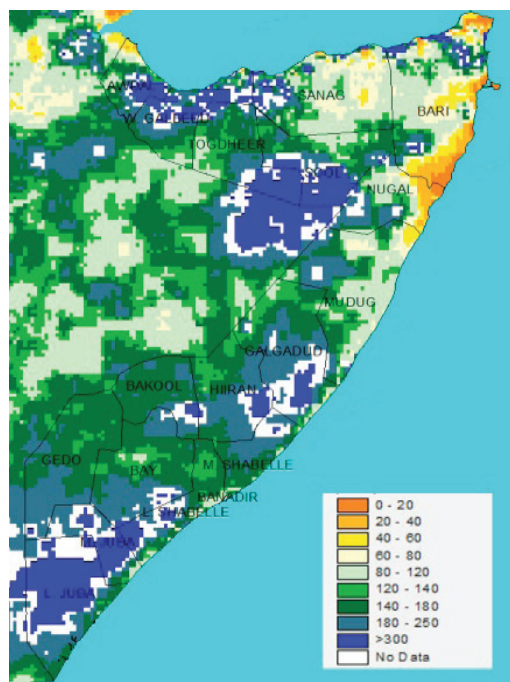
Somalia Seasonal Timeline & Key Events



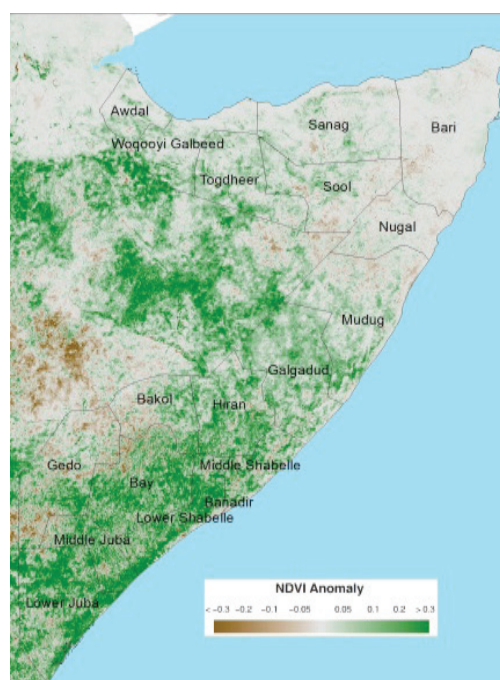
SECTOR HIGHLIGHTS

CLIMATE

Map 1: March - May 2013 NOAA RFE Rainfall as % of long term mean (LTM)



Map 2: June 5, 2013 E-MODIS NDVI Anomaly



Source: National Oceanic and Atmospheric Administration (NOAA)

Rainfall Performance

The 33rd Climate Outlook Forum (COF) for the Greater Horn of Africa (18-20 February 2013) predicted the increased likelihood of near normal to below normal long rains with late onset in March-May 2013 across the country. However, rains started during the third dekad of March, which is earlier than normal, with various intensities, duration, and coverage in most rural areas of the country. In April, moderate to heavy rains were received in most of the Northwest and South and in some parts of the Northeast and Central regions. During the month of May, which is normally the peak of the rainfall season and is very crucial for crop establishment and pasture regeneration, most of Bari, Sanag and Central regions remained dry. Hawd pastoral livelihood zone in the North and the key agricultural and pastoral areas of the South received fairly average and evenly distributed rainfall from March to April 2013. Rains ceased early in May in most southern regions, while light showers precipitated only in parts of Lower Shabelle and Juba regions (Map 1).

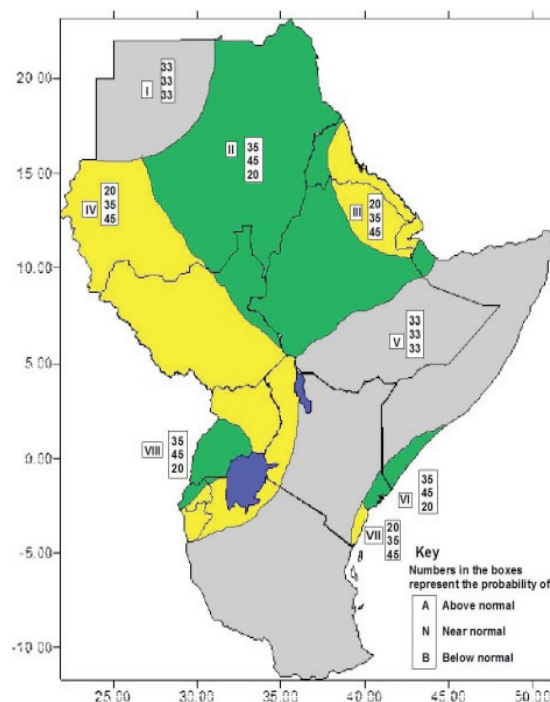
Vegetation Conditions

The satellite-derived Normalized Difference Vegetation Index (NDVI) indicates normal vegetation in most of the agricultural and pastoral areas of the South and Northwest regions. However, a significant decrease in vegetation is observed in the pastoral areas of Bari, some parts of Sool, Sanag, and Mudug regions ((Map 2).

Climate Outlook for Coming Hagaa and Karan seasons (June-August 2013)

The 34th Climate Outlook Forum for the Greater Horn of Africa (29-30 May 2013), organized jointly by the Inter Governmental Authority on Development (IGAD) Climate Prediction and Application Centre (ICPAC), The World Meteorological Organization (WMO) and the National Meteorological and Hydrological Services of ICPAC countries, predicted an increased likelihood of near normal to above normal rains in some parts of Awdal and the coastal areas of Lower Juba and Lower Shabelle regions. It also concluded that average *Karan* rains are likely to precipitate in the agropastoral areas and West-Golis livelihoods of the Northwest regions. Normal dry conditions for the season will prevail in the rest of the country in June-August (Map 3).

Map 3: Greater Horn of Africa Consensus Climate Outlook for the June to August 2013

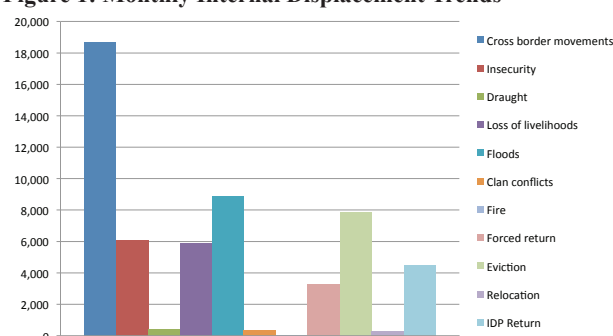


CIVIL INSECURITY

Events (Political, clan conflicts)

During the second quarter of 2013, incidences of violence, such as suicide bomb explosions, land mines, targeted killings, and armed confrontations, have continued in most of the southern regions. Clan revenge related killings were reported in the rural areas of the Central regions (areas between Harardere and Hobyo). The withdrawal of Ethiopian troops from Hudur (Bakool) has caused security tensions in Bakool region with the return of insurgent militias. There are heightened political tensions between the Governments of Somalia and the self-proclaimed autonomous region of Jubaland (Gedo, Middle and Lower Juba), which established its administration in the port town of Kismayo. The situation is currently being mediated by the IGAD.

Figure 1: Monthly Internal Displacement Trends



The United Nations High Commissioner for Refugees (UNHCR) estimates that 41 percent (18,108 people) of all population movement since January 2013 was cross border movement, due to the return of refugees from Kenya, Ethiopia, Saudi Arabia and Yemen (Figure 1). However, the majority of the population movements were internal, caused by floods, insecurity, lack of livelihood, etc. Most of the movements occurred from and within regions of Banadir, Lower Juba, Gedo, Shabelle, Bakool and Hiran.¹ Insecurity continued to affect trade and market activities as well as the delivery of humanitarian assistance in South-Central. According to FSNAU field reports, conflict disrupted the movement of food and other basic commodities in most parts of the southern regions, particularly in the Bakool region. Disputes in the Central regions also restricted pastoral migration and heightened tensions in the urban areas of Hobyo. Similarly, political differences between the Central government and the autonomous regions sparked violence among the inhabitants.

AGRICULTURE

Gu 2013 rains started early, resulting in an average crop planted area nationwide except for in the Cowpea Belt in Middle Shabelle and Central, in the Hiran region and the coastal areas of Lower Shabelle, which experienced poor rains in terms of amount, frequency and coverage. However, rainfed maize planting may increase along the coastal areas of Lower Shabelle with the start of anticipated *Hagaa* rains. In southern Somalia, the area with established crops is less than the area planted due to floods, weed infestation, and a dry period lasting 15-20 days in most of the southern regions during May 2013. Crop establishment was further affected by insect infestation (crickets and grasshoppers) in the agropastoral livelihood zones of Bay, parts of Middle Juba, and Shabelle Valley, where crops were replanted 2-3 times.



Good Sorghum Crop. Bur Hakaba, Bay, FSNAU, May 2013

In the *desheks* of the Juba regions and the riverine areas of Shabelle, Gedo, and Middle Juba (Sakow and Buale), crop establishment is average to near average. Exceptions are the districts of Jowhar/Mahaday (Middle Shabelle) and Kurtunwarey (Lower Shabelle), which experienced river floods where 6 000 hectares (ha) of maize crops and 3 000ha of sesame were damaged. In addition, an estimated 3,000ha of planted crops were damaged by flash floods in Wanlaweyne district of Lower Shabelle and in Bay region. About half of the area damaged by the floods has been replanted. The timely start of the *Hagaa* rains is crucial for crop development for the established crops and ongoing planting of the riverine flood receded areas.

The seasonal harvest is expected to begin as usual (June-July 2013), apart from in the agropastoral areas where replanting of crops took place (Qansax-dheere, Baidoa and Dinsoor and Wanlaweyne districts) following the recession of flash floods. The harvest of late planted crops will be delayed (approx. 3,000-3,500Mt in the flood affected areas) up to mid August.

¹ The United Nations High Commissioner for Refugees (UNHCR) [Online] Available from <http://data.unhcr.org/horn-of-africa/country.php?id=197>

The off-season harvest of the ongoing/late planted crops in Juba *desheks*, riverine areas of Kurtunwarey and Jowhar will be collected in late September to early October. Production in Gedo, Middle Juba, Bay, Middle Shabelle and Bakool is expected to be below average to near average. However, Lower Shabelle is likely to receive below normal *Gu* cereal production due to decreased area planted under cereal at the expense of increased sesame planting as well as flood damage. The marginal producing areas of Lower Juba (Lower Juba Agropastoral), the Cowpea Belt and Hiran (both agropastoral and riverine) are anticipating poor crop production. Overall, early indications for *Gu* crop production (sorghum and maize) is projected to be below average to average. In the Northwest, crop establishment is average due to good *Gu* rains. However, the cereal production outlook, particularly for sorghum, in the Northwest agropastoral livelihood zone will depend on the performance of the *Karan* rains, which will commence in late July 2013. FSNAU and partners will conduct a field crop assessment across Somalia from 11 to 25 July 2013 to obtain more accurate estimates of crop production.

LIVESTOCK

Pasture, Water and Livestock Migration

As a result of good *Deyr* 2012/13 seasonal performance and *Gu* 2013 rains, the pasture, browse and water conditions in most of the key pastoral and agropastoral areas, which hold the largest amount of livestock across the country, have significantly improved. Exceptions are large parts of the Bari region (Sool Plateau, Dharoor Valley, Upper Coastal *Deeh*), pockets in Sanaag (Golis/Gebi/Guban) and the eastern part of the Nugaal Valley in the Sool and Nugaal regions, where pasture and water conditions are below average due to poor rains. In the South-Central, *Gu* rains were either below average or poor in Coastal *Deeh* of Shabelle and Central regions, as well as in parts of the Cowpea Belt and Addun of Central. Consequently, pasture and water depletion is likely to occur in the course of the *Hagaa* dry season (July-August 2013). However, expected *Hagaa* (June/July) rains may alleviate projected pasture and water shortages in the rain deficit Coastal *Deeh* of Lower Shabelle.

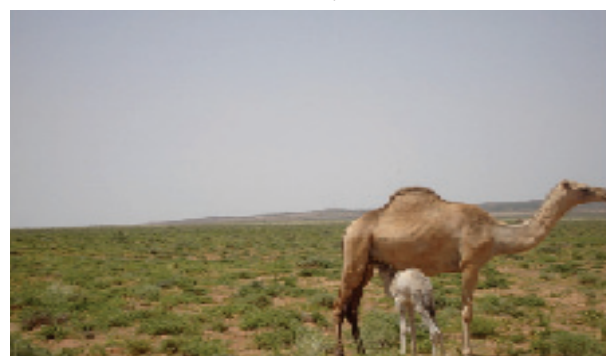
Livestock migration for most parts of the country has been normal, with movement confined within the original livelihood zone and/or into the adjacent areas with better pasture and water. During May there was an abnormal livestock in-migration to the Sool Plateau of the Sanaag region from Dharor, the Sool Plateau of the Bari region and from other rain deficit livelihood zones in the Sanaag Region (Golis/Gebi/Guban). Similarly, pastoralists from areas with poor rainfall in the central regions (Coastal *Deeh*, parts of Addun and the Cowpea Belt) have migrated to adjacent areas with better rainfall.

Livestock Condition, Production and Reproduction

In all pastoral and agropastoral livelihood zones across the country, livestock body conditions improved to levels of average to above average, equivalent to score 3-4 according to the Pictorial Evaluation Tool (PET) scale from 1 to 5. At the beginning of the *Gu* season, kidding and lambing were mostly low to medium in the North-Central regions but medium to high in the South. Most of the cattle in the South calved in the last *Hagaa* season and conception is medium in the current *Gu* 2013 season. Most of the camels in the South are currently lactating, while some camel calving (smaller cohort) is also expected in this *Gu*. Similarly, in the North and Central regions a small amount of cattle and camels are calving in this *Gu* season. Consequently, milk availability is expected to be near normal to normal, with the exception of the Guban livelihood zone in the Northwest. In this livelihood, which experienced consecutive poor rainy seasons, livestock conception (and therefore milk production) has been very low.



Good Pasture. Hawd, Mudug,
FSNAU, May 2013



Camel Calving. Nugaal Valley, Sool,
FSNAU, May 2013

MARKETS AND TRADE

Exchange Rate Trends

During the first quarter of 2013, the Somali shilling (SoSh) continued to gain against the U.S. dollar (USD) before depreciating slightly in April and May. In the January-May period, the dollar gained 15 percent in Mogadishu's main Bakaara market and 4-5 percent in the Central and Northeast regional markets. The shilling has experienced gradual appreciation over the past year and a half, with annual gain representing between 17-23 percent in the South and 12-14 percent in the Central and Northeast. The Somaliland shilling (SiSh) to USD exchange rate remained relatively stable at an average of 6,627-6,902SiSh per USD in SiSh zone.

Import commodity prices, and trade

In most markets in the country, prices of essential imported commodities (rice, sugar, wheat flour, vegetable oil and diesel) either declined or remained stable in the January-May period (Figures 2 and 3). Banadir and the Shabelle Valley trade basin exhibited the highest price decline from January (10-28%) due to the modest gains of the shilling and proximity to Mogadishu port. Annual price changes from May 2012 indicate a 9-35 percent decline in the SoSh areas. They have remained stable or decreased from May 2012 in SiSh areas, as normal supply flow from Berbera port to the markets has been maintained. Prices of most imported commodities have generally followed international trends, with the exception of diesel prices in Bossaso market, which increased (20%) despite a global decline in crude oil prices. This increase came after the Puntland Authority banned fuel traded from Yemen early this year after establishing a monopoly (Puntland Petroleum Company) in the local fuel market.

Cross-border livestock movement from Ethiopia to Somalia increased (37%) in January-May 2013 when compared to the same period last year. This is in preparation for *Ramadan* in July/August and the *Hajj* in October, when livestock are expected to be re-exported to the Arabian countries in anticipation of large price spikes. Re-exports from Somalia of sugar, wheat flour, and pasta, among others, to Kenya and Ethiopia have slightly declined (4%) due to increasing security operations targeting human movement and trade restrictions (higher taxes) imposed by the Kenyan and Ethiopian governments, respectively. Meanwhile, livestock exports through Berbera and Bossaso ports have declined (25%) in the same period of comparison due to ongoing assembly and livestock fattening activities in preparation for exports during *Ramadan* and *Idd* seasons.

Consumer Price Index

The Consumer Price Index (CPI) for poor households shows a slight reduction in the cost of living during January-May 2013 in the Somali shilling areas, reflecting the slight decline in the prices of the main commodities in the consumer basket such as cereals and, to a lesser extent, sugar. Over the past year, the CPI has decreased by a significant 27 percent in the SoSh areas (South, Central and Northeast) mainly due to the influence of the stronger Somali Shilling. The CPI remained largely unchanged in the North's Somaliland shilling-using areas (Figure 4).

Figure 2: Trend in Imported Rice Prices (SoSh/SLSh)

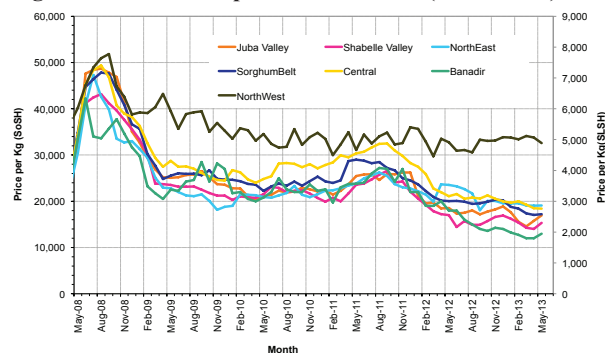


Figure 3: Trend in Imported Wheat Flour Prices (SoSh/SLSh)

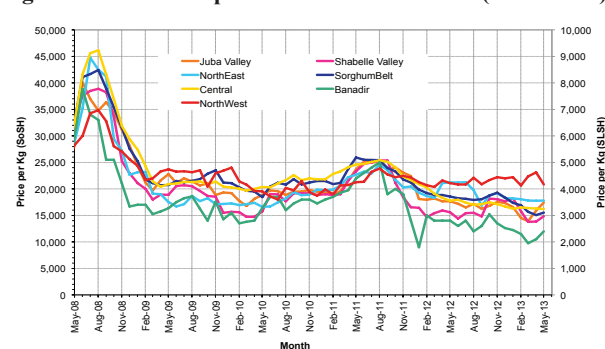
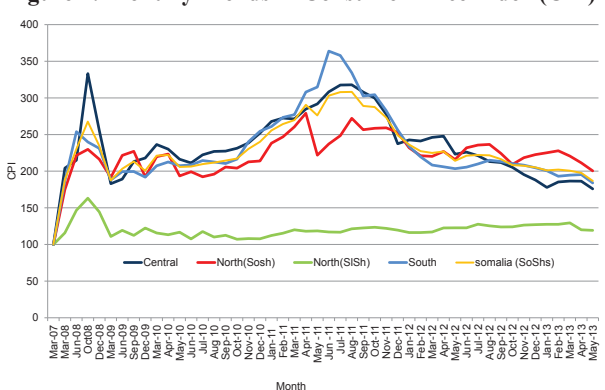


Figure 4: Monthly Trends in Consumer Price Index (CPI)



NUTRITION SITUATION

In January 2013, based on FSNAU assessments, 215,000 children under five were acutely malnourished, of whom 45,000 were severely malnourished. In rural livelihoods, the nutrition situation varied from *Alert* to *Critical* in North and Central and from *Serious* to *Very Critical* in the South. In the assessed urban areas, the nutrition situation varied from *Alert* to *Critical*, and in most of the assessed IDP settlements the nutrition was *Critical* or *Very Critical* (Map 4).

The nutrition situation outlook up until April 2013, based on the Post Deyr 2012/13 assessment, median seasonal rates (2001-2011), historical disease patterns and food security trends, indicated sustained levels of acute malnutrition in most areas across the country. Exceptions were:

- Sool plateau, where the nutrition situation was expected to deteriorate to *Serious* levels (GAM 10-14.9) from *Alert* (GAM 5-9.9%) due to an anticipated decrease in milk availability.
- Bakool and Hiran regions are expected to show improvement in nutrition situation from *Critical* levels (GAM 15-20%) to *Serious* (GAM \geq 15%). This is due to improved access to milk in all livelihoods, attributed to camel calving and kidding/lambing of goats and sheep.

Current Nutrition Situation

Health Indicator Survey (HIS) data from health facilities and the WHO Health Update¹ were used to assess the current nutrition trends in different regions. Malnutrition trends reported by HIS in Southern Somalia and in the Northwest were stable or showed an improvement, though the presence of aggravating factors (diarrhoea, cholera, and malaria) can easily reverse the trends and worsen the nutrition situation. Deterioration of the nutrition situation was seen only in Hawd region of Central and Northeast Somalia. Confirmed malaria was the leading cause of morbidity and Central and Southern Somalia reported 76 percent of the cases. Cholera is endemic in Somalia and 74 percent of reported cases were children < 2 years of age.

**Map 4: Somalia Estimated Nutrition Situation
February - April 2013 Projection**

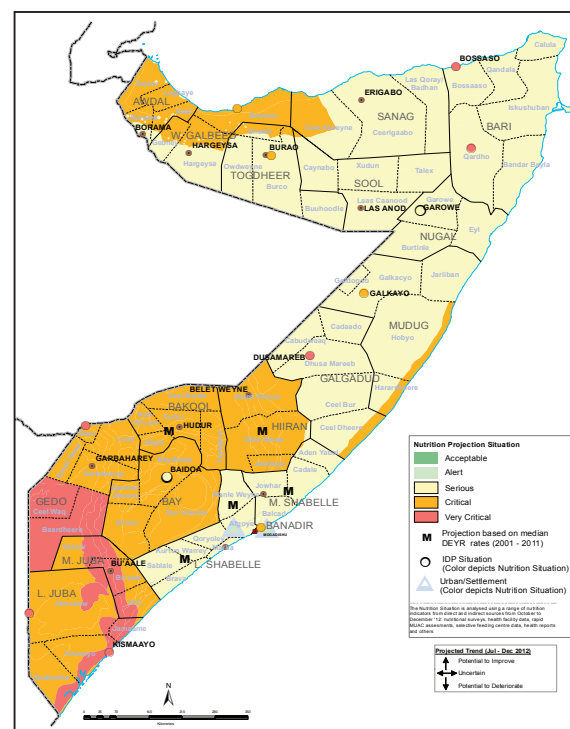


Table 1: Current Nutrition Situation

Region		HIS trends for Malnutrition in Under 5 children (Jan-Mar 2013 compared to Jan-Mar 2012)			Aggravating factor (WHO update)				
		Stable	Improving	Deteriorating	AWD	Cholera	Malaria	Measles	Others
Southern Somalia	Gedo		↑		*	*	*		
	Juba		↑		*	*	*	*	
	Bay	↔						*	
	Bakool	↔							
	Shabelle		↑			*			shigello sis
	Banadir					*			
Central and Northeast	Hiran	No data							
	Hawd			↓	Suspected measles cases, Suspected whooping cough, Suspected neonatal tetanus				
	Addun	↔							
	East Golis	↔							
	Sool Plateau	↔							
	Nugal Valley		↑						
Northwest	Coastal Deeh	↔							
	West Golis		↑		No data				
	Nugal Valley	↔							
	Sool Plateau		↑						
	Agro-pastoral	↔							
	Hawd		↑						
	East Golis	↔							

Update on Gu 2013 Surveys

Integrated Nutrition and Food Security surveys are ongoing in Mogadishu (town and IDP settlements), Kismayo (town and IDPs in Lower Juba region) and in IDP settlements in Bossaso, Qardho, Garowe, Galkayo in the Northeast regions. In others areas, planning of nutrition surveys is ongoing and will be completed by the end of July 2013.

¹ Somalia Emergency Health Update (February 2013, WHO)

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The food security situation improved in most towns in the post *Deyr* 2012/13 period; the majority of urban areas are classified as **Stressed** (IPC Phase 2) through June 2013, with the exception of Bakool, Middle Juba and Lower Shabelle, which are in **Crisis** (IPC Phase 3). The main factors that strengthened the purchasing power of the urban poor and improved urban food security were continued humanitarian assistance, reduced food prices and cost of living, scaling up of economic activities, increased labour opportunities, and improved food security situation in surrounding rural livelihoods. However, destroyed road infrastructure and heavy rains curtailed trade flows into Juba, Lower Shabelle and Hiran Markets, resulting in reduced labour opportunities, mostly portage activities, for urban poor.

In the January-May period, the cost of the Minimum Expenditure Basket (MEB) decreased in nearly all areas, except for in a few towns in the Central and Togdheer regions, which remained relatively stable (Table 2). Compared to the same month last year, the minimum cost of living is significantly reduced in most regions. The general reduction in minimum household expenditure is due to reduced prices of local and imported food commodities. However, the MEB cost went up in dollar terms in towns that use SoSh, due to depreciated dollar value against SoSh over the past year. This has affected the purchasing power of households that rely heavily on dollar cash transfers (remittances and humanitarian) as their main source of income. In Mogadishu, remittances represent one of the major income sources for about one-third of the resident households.¹

Market monitoring information indicates improved or stable labour wages in most regions when compared to January 2013 and to May 2012 in line with seasonal trends. The latter is related to reduced supply of labour in urban areas as urban poor increasingly engage in farm labour activities in surrounding rural livelihoods. However, a slight reduction in casual labour wages was recorded in Juba, Hiran and Middle Shabelle due to reduced labour opportunities and increased cereal prices in view of the recent seasonal rains that have cut road networks. In SoSh areas, the lowest wage rate in May 2013 was recorded in the South (36,000SoSh in Middle Shabelle) and the highest was in the Northeast (150,000SoSh in Sool). Wage rates ranged from SISH 36,000 to 46,000 in the North SISH areas. The nominal Terms of Trade (ToT) remained either stable or improved except in Juba, Hiran and Shabelle, where they decreased (Figure 5,6). The highest nominal ToT between labour and cereal in the month ending in May 2013 was in Bay (27kg/daily labour wage) while the lowest was in Northeast and Central (8kg/daily labour wage). However, the highest purchasing power gain (42%) during the May 2012-May 2013 period was recorded in Mogadishu (17 kg/daily labour wage). ToT was slightly higher than in the same month last year in most regions, primarily due to reduced cereal prices (7-28%).

¹ FSNAU Mogadishu urban survey, July 2012.

Table 2 : Minimum Expenditure Basket

Zone	Region	MEB Cost (Local Currency) (May' 013)	% change from:	
			Jan 2013	May 2012
Central	Galgaduud	1,946,688	-1%	-26%
	Mudug	1,488,469	-1%	-30%
North East	Bari	2,961,750	-7%	-14%
	Nugaal	2,904,938	-16%	-19%
	Sanaag	2,920,488	-12%	-15%
	Sool	2,955,250	-11%	-1%
North(SiSh)	Togdheer	777,000	-3%	0%
	Awdaal	643,088	-16%	-12%
	Woqooyi Galbeed	735,731	1%	3%
South	Bakool	1,224,500	-24%	-14%
	Bay	789,250	-11%	-27%
	Gedo	1,426,700	-9%	-8%
	Hiraan	1,310,500	-13%	-11%
	Lower Juba	1,452,956	-9%	-16%
	Lower Shabelle	938,020	-10%	-16%
	Middle Juba	1,338,150	-14%	-12%
	Middle Shabelle	1,083,265	-11%	-21%
Mogadishu	Banaadir	1,091,625	-9%	-11%

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

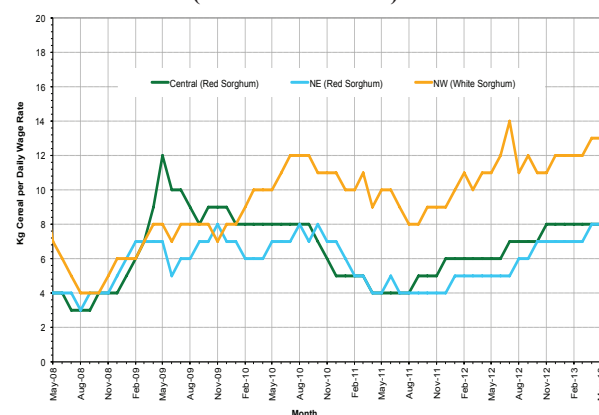
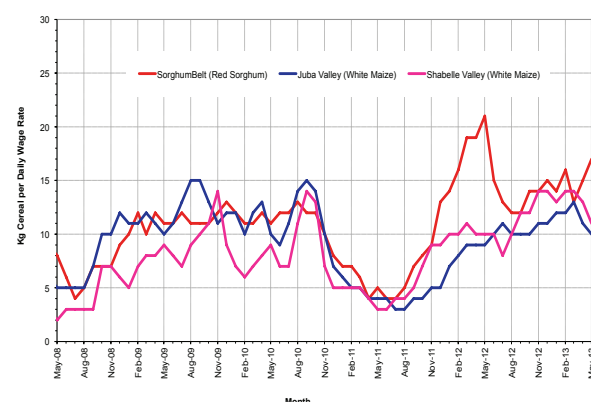


Figure 6: Regional Trend in Terms of Trade Cereal to Labour (South)



RURAL

Northern Regions

Exceptional *Deyr* rainfall performance significantly improved livestock and crop production in most of the North. Consequently, through June 2013, most rural livelihoods are classified as **Stressed** (IPC phase 2), apart from West Guban livelihood in Awdal and Woqooyi Galbeed, which is in **Crisis** (IPC Phase 3). As a result of good *Gu* rains in March and April, rangeland and water resources have improved in most of the livelihood zones. Exceptions are large parts of the Bari region, pockets of Sanaag and the lower part of the Nugaal valley where pasture and water are poor due to poor *Gu* rains. Livestock body condition improved across the North (PET scores of 3-4) due to improved pasture and better migration options. Medium kidding and lambing of goats and sheep occurred in most of the northern rural livelihood zones during *Gu*. Only a small number of cattle and camels will be calving during this *Gu* season (from June 2013 and on), as large numbers calved last *Deyr*. Consequently, milk availability is near normal to normal, with the exception of the Guban livelihood zone in the Northwest, where recent droughts caused most of the livestock to not conceive in recent seasons. Despite heavy infestation of insects (stalk borers), farmers in W. Galbeed and Awdal planted short cycle maize in (April) to consume during the hunger period (late June-July), while the long cycle sorghum planted in May is to be harvested in late October-November. In the Togdheer agropastoral livelihood zone, average crop production is expected during this *Gu* season due to normal/good rainfall performance and positive flash floods from the highlands that irrigated the depressed farm lands. Sorghum, maize, cowpeas and vegetables are the crops planted in the regions.

In January-May 2013, local quality goat prices increased slightly (7%) in most markets in the Northeast, but declined in the Northwest (by 9%) [Figure 7]. The price decrease in the Northwest is attributable to oversupply in the markets from Guban livelihood zone as pastoralists are repaying debts by taking advantage of enhanced livestock body condition following the improved pasture and water availability due to off-season rains (March). Rice prices declined marginally across the northern regions. In the Northeast (Bari and Nugaal), the ToT between local quality goat and imported rice increased moderately to reach 73-106kg/head in May 2013 due to increased goat and decreased rice prices. Similarly, the ToT for local quality goat/sorghum in the same regions increased in Bari (6%- 84kg) and Nugaal (36%-98kg) due to increased goat and decreased sorghum prices. In the Northwest, the ToT between local quality goat and imported rice increased by 18 percent in Hargeisa (93kg/head) and 11 percent in Buao (78kg/head) in the first five months of the year due to the same reasons explained above. The only exception is the Awdal region, where the ToT (goat/rice) has declined moderately (20% on average) and is down to 64 kg/head as a result of decrease in goat prices (22%) due to the above mentioned oversupply from Guban pastoralists. The ToT between local quality goat and white sorghum has also declined (20%) in the region to 86kg/head. Conversely, the ToT goat/white sorghum increased slightly (4-6%) in Togdheer (111kg) and Woqooyi Galbeed (142kg), mainly due to the decrease in sorghum prices in W. Galbeed and the increase in goat prices in Togdheer (Figure 8).

Figure 7: Regional Trends in Local Quality Goat Prices (SOSH/SLSH)

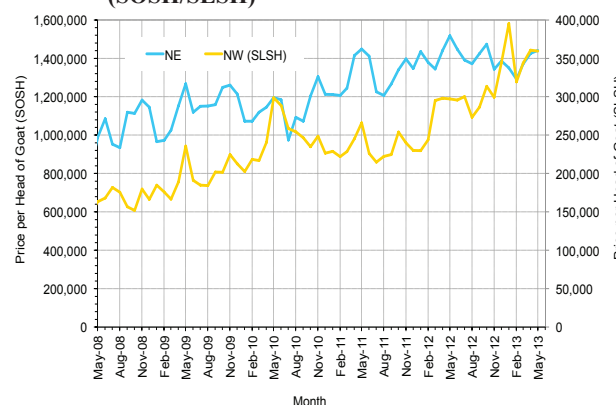
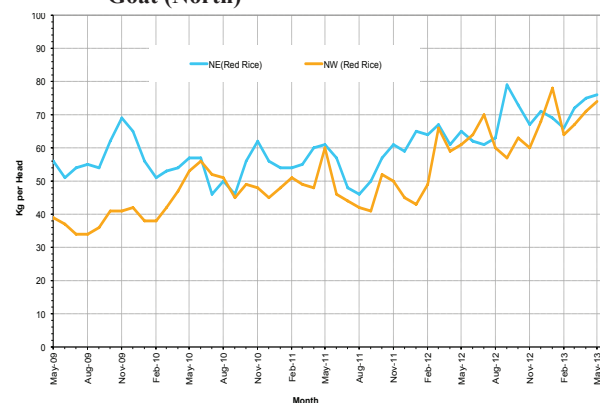


Figure 8: Regional Trend in Terms of Trade Cereal to Goat (North)



Central Regions

In the post *Deyr* 2012/13 period (January-June 2013), the Coastal *Deeh* is identified as being in **Crisis** (IPC Phase 3), an improvement from Emergency (IPC Phase 4) in post-*Gu* 2012. All other livelihoods, including the Cowpea Belt, Hawd and Addun, are identified as **Stressed** (IPC Phase 2).

As a result of moderate *Gu* rains in most livelihood zones (Hawd, large parts of Addun and the Cowpea Belt), pasture, browse and water availability have improved, except in Coastal *Deeh*, where poor *Gu* rains caused livestock to migrate to adjacent livelihoods. Average to good livestock body conditions (PET 3-4) are reported in all the livelihood zones. Medium kidding for goats/sheep is reported, while low camel birth rates are expected in June as large numbers of camels gave birth last year (December 2012). Milk production improved across the livelihoods and consequently camel milk prices declined by 16 percent in May compared to January and by 35 percent compared to May 2012. The cowpea crop is performing poorly due to a dry spell (moisture stress) after planting; consequently, below average harvest is expected in the Cowpea Belt.

In January-May 2013, the local quality goat prices increased by 49 percent in the Coastal *Deeh*/Cowpea Belt and remained stable in Hawd/Addun livelihood zones (Figure 9). This trend is attributable to reduced livestock supply in Cowpea Belt/Coastal *Deeh* markets as these livelihoods are in herd size recovery and the start of live animal stocking by traders for the upcoming *Ramadhan* period (July). Yearly goat prices in Central remain mostly stable (decline of 3%).

Rice prices declined by 12 percent in Coastal *Deeh*/Cowpea Belt, but decreased slightly (2%) in other livelihood zones. High goat prices and reduced rice prices in the Coastal *Deeh*/Cowpea Belt significantly improved the ToT between local quality goat and rice, which increased by 73 percent (from 49kg to 85kg/head) between January and May 2013. However, in the areas in which the security situation is particularly tense (including Dhusamareb, Galkaáyo and Abudwaaq districts), the ToT either remained stable or increased marginally by 2 percent (62 kg of rice/head). Similarly, red sorghum prices declined in the last month compared to January 2013 (3%) and May 2012 (28%). The ToT between local quality goat and red sorghum increased in all the livelihood zones of the Central region in the first five months of the year. As of May 2013, the local quality goat/red sorghum ToT is equivalent to 106kg/head in Hawd/Addun and 197kg/head in the Cowpea Belt/Coastal *Deeh* (Figure 10).

Southern Regions

The population in crisis (defined as IPC Phase 3 and 4) reduced by over 50 percent from post *Gu* 2012 to post *Deyr* 2012/13 due to excellent *Deyr* rainfall performance that immensely improved livestock and crop production across southern Somalia. Consequently, most rural livelihood zones in the South are classified as **Stressed** (IPC Phase 2) through June 2013, with the exception of the Juba Agropastoral livelihood zone (Jamame district), which is in **Crisis** (IPC Phase 3).



A Average Goats Body Condition and Poor Pasture. Coastal *Deeh*, Mudug, FSNAU, May 2013

Figure 9: Regional Trends in Local Quality Goat Prices (SOSH)

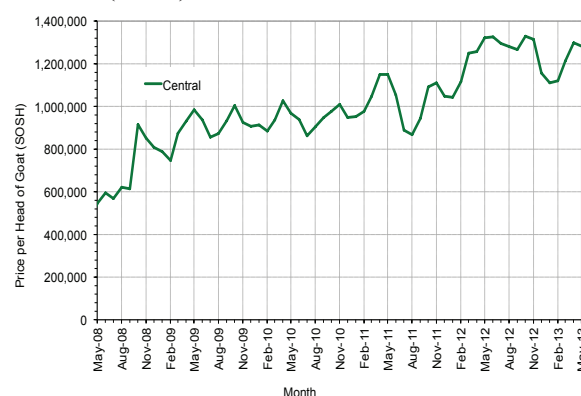
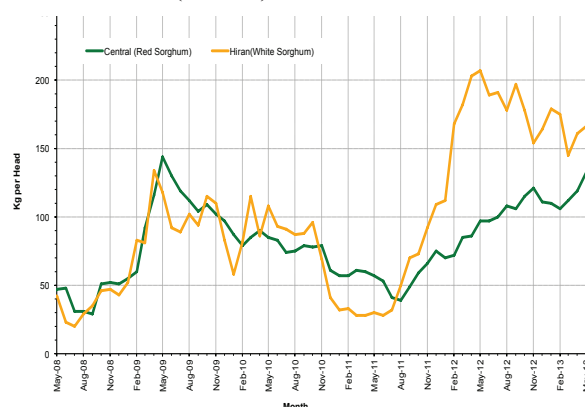


Figure 10: Regional Trend in Terms of Trade Cereal to Goat (Central)



Despite abundant *Gu* rains from April to mid-May, the *Gu* 2013 cereal harvest is likely to be below average in both agropastoral and riverine areas. Flash and river floods (Jowhar and Kurtunwarrey), insect infestation, prolific weeds, early end of *Gu* rains, and a preference for cash crop cultivation all negatively affected the cereal crop performance in the South. Poor crop establishment in both riverine and agropastoral zones is observed in Hiran, coastal areas of Lower Shabelle, and marginal crop producing areas of the Lower Juba agropastoral zone (Kismayo, Afmadow and Badhadhe districts) due to floods, insecurity, poor rains and high fuel costs. However, Juba and Shabelle regions are likely to benefit from average *Hagaa* rains (July-August). Rangeland conditions and livestock production and reproduction improved across southern Somalia as a result of good *Gu* rains at the start of the season.

Cereal prices exhibited a mixed trend from January to May 2013. Maize prices increased by 15-38 percent across southern markets, while sorghum prices declined everywhere except the Bay regions, where they remained relatively stable (Figure 11). Farm labour wage rates increased in most agropastoral areas, with the exception of Hiran region (25% decline), owing to increased agricultural activities with the onset of *Gu* rains. In the riverine areas, wage rates remained stable in Juba, marginally declined (12%) in Lower Shabelle due to excessive rains and floods, and increased in Middle Shabelle (34%) due to continued replanting activities. The labour to cereal ToT increased in Gedo, Bay, and Middle Shabelle but declined in Bakool, Hiran, Middle Juba and Lower Shabelle. The highest ToT in May 2013 were recorded in Bay and the lowest in Middle Juba. The yearly comparisons indicate a ToT increase (40-80%) in most regions with the highest increase (150%) in Middle Juba, which is mostly due to considerably improved agricultural labour wage rates because of a favourable planting season compared to last *Gu* season.

Livestock prices exhibited mixed trends in southern markets. In the first five months of 2013, the local goat prices declined in most southern regions (4-17%), apart from Bakool, Middle Juba and Hiran, where they increased (4-17%) [Figure 12]. Compared to a year ago, local quality goat prices declined (10-20%) in the Sorghum Belt (Bay, Bakool, Gedo, Hiran), increased moderately (9%) in Juba regions and remained stable in the Shabelle regions. In January-May 2013, local quality cattle prices either remained stable or increased slightly (up to 10%) in most of the southern markets, except for Bay and Bakool, where they declined (18%) due to the limiting effect of insecurity on market supply. Cattle prices showed significant annual increases in most markets apart from Gedo, Bakool and Bay regions, where they declined or remained relatively stable. Most notably, cattle prices increased in Hiran region (64%) due to diminished supply (most cattle is either lactating or conceiving) and increased demand from Mogadishu. In May 2013, goat to cereal ToT declined (15-29%) since January in most regions, except in Bay region, where it remained stable. The highest ToT in May 2013 was recorded in Bay (498kg/head), and the lowest was in Gedo (114kg/head). The yearly comparison indicates stable ToT in most regions with moderate declines (20-35%) in Hiran and Bakool regions (Figure 13).



Maize Crop Heavily Infested by Weed. Jowhar, Middle Shabelle, FSNAU, May 2013

Figure 11: Regional Trends in Cereal Prices (SOSH/SLSH)

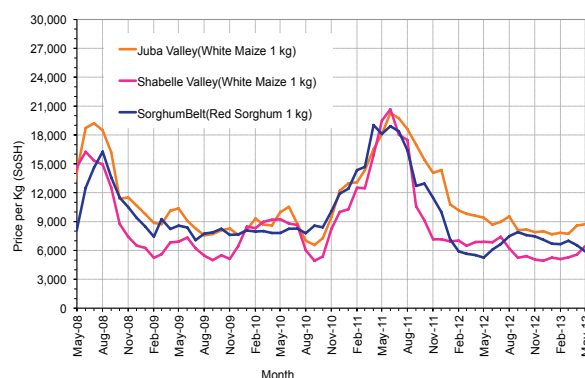


Figure 12: Regional Trends in Local Quality Goat Prices (SOSH)

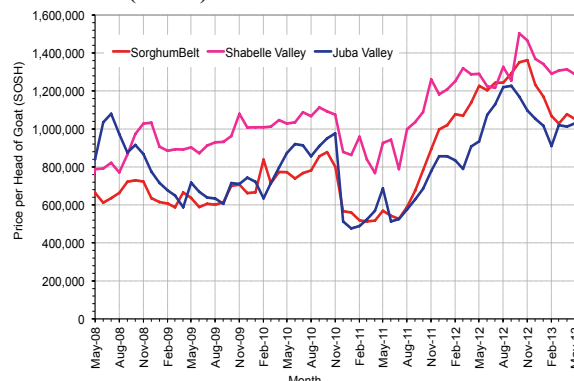
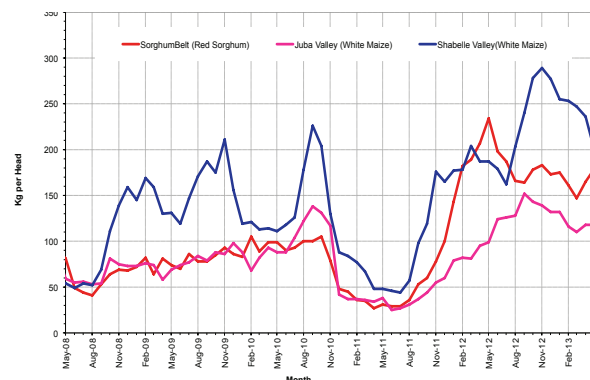
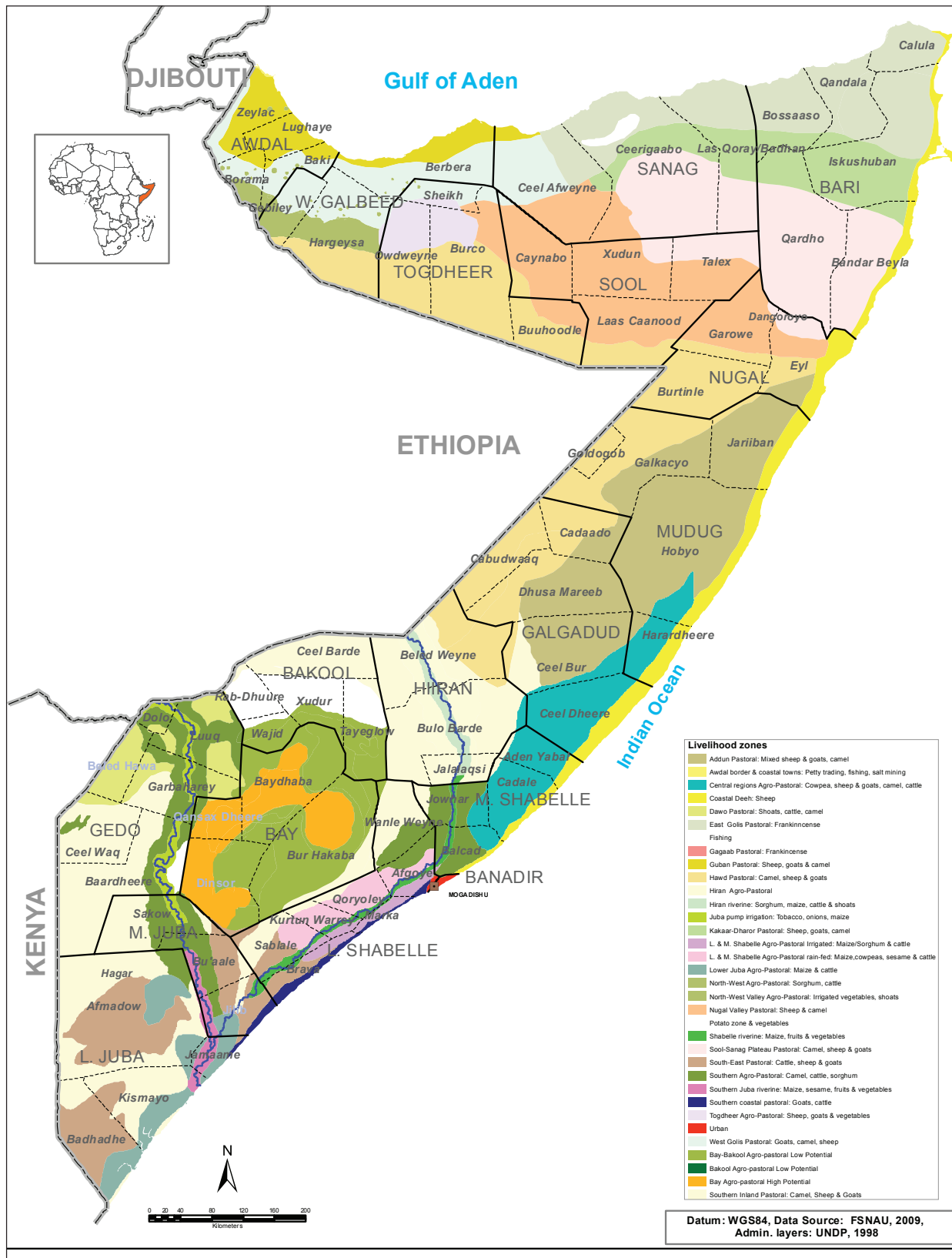


Figure 13: Regional Trend in Terms of Trade Cereal to Goat



SOMALIA LIVELIHOOD ZONES MAP



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