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Food Security & Nutrition

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

KEY ISSUES Based on ongoing monitoring activities in addition to the results of rapid preliminary *Gu* season field assessment carried out in June 2014, the food security situation is projected to deteriorate in Somalia in the post-*Gu* period (July-December 2014). Within the context of limited humanitarian assistance, the major factors contributing to the deterioration of the food security situation include below average harvest prospects as a result of late and erratic *Gu* rains, rising food prices, armed conflict and associated displacements as well as disruptions in farming and trade activities in the first half of the year.

Climate

Markets

Nutrition

Agriculture

Livestock

Civil Insecurity

Emerging Regional Issues

FSNAU - Somalia

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Malnutrition trends based on data from health facilities for January to April 2014 indicated a mixed trend across the country. Accordingly, high levels of malnutrition were recorded in southern Somalia as well as parts of the northwest and central regions. Seasonal diseases associated with the rainy season as well as reduced food access in the conflict-affected areas are among the key factors that aggravated malnutrition. However, improved access to milk in most pastoral and agropastoral areas is likely to mitigate the malnutrition situation in these areas in the months to come.

The *Gu* cereal crop production prospects are bleak due to largely below normal *Gu* rains as well as disruption of farming activities caused by armed conflicts, including in the high agricultural (cereal production) potential areas (Qorioley district in the Lower Shabelle region). The expected below average cereal production is likely to exert additional upward pressure on cereal prices. Cereal prices have been increasing since the beginning of the year in most markets of the country due to a lack of stocks from the previous below average *Deyr* 2013/14 harvest in addition to insufficient humanitarian assistance. The projected near normal *Karan* rains (July-August) in the Northwest is expected to improve the cereal harvest (*Gu-Karan*) in agropastoral areas (to be collected in November), which thus far have not performed well due to delayed and erratic Gu rains.

Most pastoral livelihood regions are likely to sustain the current food insecurity phase based on the Integrated Phase Classification (IPC) severity scale. Livestock conditions are average in most pastoral areas despite late and erratic *Gu* rains, while milk availability is projected to improve with calving, expected in June-August in most areas. Pastoralists are also likely to benefit from anticipated increases in livestock sales during the upcoming Ramadan (July) and *Hajj* (October) festivities. However, the expected increase in cereal prices in the context of reduced national cereal production and lack of humanitarian assistance will negatively impact the purchasing power of poor pastoralists.

Scaled humanitarian assistance is required from now at least to December 2014 to mitigate the imminent worsening of the food security situation in Somalia.

There are strong indications that an El Nino is likely to develop towards the last quarter of 2014. In the context of Somalia, historically, El Nino has been associated with flooding and flood related damages. Further deterioration in the food security situation is possible in riverine areas in Southern Somalia and in low-lying areas across the country during the last quarter of 2014 if the El-Nino projection and consequent flooding materializes.



SECTOR HIGHLIGHTS

CLIMATE



Rainfall Performance

The *Gu* (April-June) rains had a late start in most parts of the country and overall rainfall performance in March-May was largely below normal in terms of amount, duration and spatial coverage. The areas which experienced overall moderate rains during this period include parts of the southern regions of Middle and Lower Juba, Bay and southern Gedo, localized areas of the Cowpea Belt in Central, the Hawd and West Golis Pastoral livelihood zones in Togdheer and the Woqooyi Galbeed regions in the Northwest (Map1).

In May, light to moderate rainfall was experienced in most of the Northwest and South, some parts of the Northeast and in localized areas of Central regions. However, between the last *dekad* of May and early June (the peak of the rainfall season and crucial for crop development and pasture regeneration) parts of Central (most of Coastal *Deeh* Pastoral and Cowpea Belt Agropastoral), Northwest (Awdal and most parts of Woqooyi Galbeed) and most of the South (Shabelle, Hiran, Bakool and large parts of Gedo regions) largely remained dry. The rest of Somalia received moderate to light rains in the first *dekad* of June with near average distribution. The National Oceanic and Atmospheric Administration (NOAA) forecast for precipitation, valid until July 3, projected dry conditions excluding parts of Juba regions, which are predicted to receive 10-20 mm rains (Map 2).

Vegetation conditions

Significant deterioration of vegetation conditions was observable through the first dekad of May due to little or no rains in most of the country. However, positive change started during second dekad of May after relatively improved rains specifically in the South and parts of North and Central regions. The satellite-derived Normalized Difference Vegetation Index (NDVI) for the first dekad of June indicated normal vegetation in most of the country. However, negative change is still observable in parts of Juba, Gedo, Bakool, Hiran, Central, East-Golis of Sanag and coastal areas of Shabelle regions (Map 3).

Climate Outlook for Coming Hagaa and Karan rains (June-August 2014)

The 37th COF for the Greater Horn of Africa (27-28 May 2014), organized jointly by the Inter-Governmental Authority on Development (IGAD), the Climate Prediction and Application Centre (ICPAC), the World Meteorological Organization (WMO) and the National Meteorological and Hydrological Services (NMHS) of ICPAC countries, predicted an increased likelihood of average to slightly below average *Hagaa* rains in the coastal line and adjacent agropastoral areas of Lower Juba and Lower Shabelle regions. It also concluded that normal to slightly below normal *Karan* rains are likely to precipitate in the agropastoral areas and West-Golis livelihood areas of the Northwest regions. Normal dry conditions for the season will prevail in the rest of the country in June-August (Map 4). The COF 37 meeting also concluded an 80 percent chance of *El Niño*





SOURCE: FEWS NET/NOAA

occurrence in late 2014. Historically, *El Niño* has been associated with above average rainfall over the Eastern Horn of Africa during the short-rainy season (October – December) and increased risk of river floods and flash floods in the Shabelle and Juba river basins, and low-lying areas in agropastoral and pastoral livelihood zones across Somalia.

CIVIL INSECURITY

Events (political, clan conflicts)

In the period between January and May 2014, incidents of violence (suicide bomb explosions, land mines, targeted killings, and armed confrontations) as purported by the insurgents in Somalia and directed at the Somalia's federal

government officials have continued in the southern regions, particularly in Mogadishu, Hiran, Gedo, Bay, Bakool, Lower Juba and Shabelles. On the other hand, the Government of Somalia, together with its allied forces of the African Union Mission in Somalia (AMISOM), have intensified military activity against the insurgents in areas that were previously controlled by insurgents, including most parts of Bakool, Hiran, Gedo, Lower Shabelle and Galgadud regions. In the same period, resourcebased clan conflicts were reported in Lower Shabelle, particularly Marka district, and in Central Somalia, while political conflicts were reported in Sool (Taleex) and Togdheer (Buhoodle) regions.

The United Nations High Commissioner for Refugees (UNHCR) estimated population movements of about 49 000 over the last three months (Mar-May, 2014) in Somalia. The largest population displacements this year were recorded in March during the peak period of the military offensive staged by the Somalia government and allied AMISOM forces, as mentioned above (Figure 1). The displacements mainly occurred within southern Somalia regions (Banadir, Shabelle, Gedo, Bakool, Bay, Hiran and Galgadud) and some parts of the northern regions such as Togdheer (Hargeysa). Notably, about onethird of these IDPs moved to Banadir areas. Major reasons for the movements (accounting about 82% of the total movements) include: insecurity due to military offensive and threats from the insurgents (28 000 people or 57% of total movements), forced

Figure 1: Monthly Internal Displacement Trends



Source: UNHCR Somalia

Figure 2: Causes of Internal Displacement (March-May 2014)



returns mainly due to deportation from Saudi Arabia (79 000 or 16%) and cross border movements (4 400 or 9%). The remainder (or 18%) was accounted for by various reasons such as drought, lack of livelihoods, clan conflicts, evictions and IDP returning to their original residence (Figure 2).

These conflicts have resulted in losses of lives and property and have negatively affected the livelihoods of the Somali people. Specifically, insecurity hampered agricultural activities (planting) in Lower Shabelle, Hiran and Bakool, contributing to the projected decline in the Gu 2014 harvest. Additionally, trade and market activities in South-Central are impeded following the trade embargo and taxations imposed by insurgents in the newly government-recovered areas, particularly in the Bakool, Hiran and Lower Shabelle regions. Beginning in January, this contributed to a significant surge in market prices, especially in Bakool and Hiran, which has diminished the purchasing power of the local people and exacerbated food insecurity among the poor.

Humanitarian assistance: Coupled with reduced availability of funding, security and access remain the primary challenges in terms of the delivery of humanitarian aid. The predicted occurrence of blocked supply routes may lead to limited access of basic commodities in recovered towns, further worsening food security in the affected districts. So far, there is no safe, predictable and unfettered humanitarian access (source: *UN OCHA-Somalia, Humanitarian Bulletin-April 2014*).

According to the information from the Food Security Cluster for Somalia, humanitarian assistance for food access and safety net programmes was able to cover only about 46-55 percent of the actual needs since February 2014. Planning figures of the beneficiaries of these programmes is slightly down in the second half of 2014.

AGRICULTURE

Gu 2014 rains began late in most regions, resulting in below normal Gu planting. The Bay region however experienced sufficient and timely Gu rains, resulting in normal to above normal crop planted area. Increased sesame cultivation due to its higher prices, in addition to high susceptibility of cereal crops to bird damages in the Gu season has contributed to further reductions in cereal cropped areas, particularly in the agropastoral areas of Bay and Lower Shabelle. In southern Somalia, the area of established cereal crops is less than the planted area due to germination failure, intermittent dry spells and disruptions in farming activities caused by insecurity.

The majority of agropastoral livelihood zones of Hiran, Bakool, Middle Juba, northern Gedo and coastal areas of Lower Shabelle experienced moisture stress and consequent crop destruction caused by a dry spell from mid April to early May and since early June (excluding Juba regions). Most of the damaged areas were not replanted due to prevailing insecurity and lack of rains, particularly in Buloburte and Jalalaqsi districts of the Hiran region and Garbaharrey and Buur Dhubo districts of the Gedo region. In the high potential agropastoral areas of Bay however, crops are well established.

In riverine areas, average to near average establishment of cereals have been reported in most parts of Shabelle, Gedo as well as in Juba dhesheks. However, below average cereal crop establishment was reported in Middle Shabelle due to crop destruction caused by floods in May and June, as well as in the high potential cereal-producing Qorioley district in Lower Shabelle region where cropped fields were heavily infested by weeds and pests after large number of farmers had abandoned their farms in order to escape from armed conflict. In the Hiran region, riverine crop fields were severely affected by poor rains and lack of irrigation due to high fuel costs unaffordable for poor as well as middle income groups. Generally, the establishment of maize varied from vegetative to flowering and tussling stages, while sorghum was reported to be in the maturity stage. Timely start and good intensity of the Hagaa rains,



Good sorghum. High Potential Agropastoral, Bay region, FSNAU, June 2014

usually expected from late June to July in the coastal areas of Juba and Shabelle regions, are crucial for crop development and cash crop planting.

Harvesting of Gu crops is expected to begin in July and peak in August 2014 in most regions, however the overall harvest is expected to be below average in southern Somalia, given the strong indications of limited below average rains in agropastoral areas until the end of June.. Specifically, the harvest is projected to be average in the Bay region, most parts of the Gedo riverine and in the Bardera high potential agropastoral of Gedo region. Harvest is likely to be below average in the Lower and Middle Shabelle regions (particularly in riverine areas and the Cowpea Belt). Notably, the Bay and Shabelle regions normally account for 80 percent of *Gu* cereal (maize+sorghum) production in southern Somalia. Near average harvest is expected in the Lower Juba (agropastoral and riverine) and Middle Juba riverine areas, however this is dependent on average to near average *Hagaa* rains (end June-July). In contrast, cereal harvest prospects are bleak for agropastoral areas of Middle Juba, Hiran, Bakool and northern Gedo regions due to insufficient rains and conflicts, which occurred during the planting period. The most severely diminished harvest is expected in the Hiran region (agropastoral and riverine). Crop (cowpea and sorghum) harvest in the Cowpea Belt of Central is also likely to be below average to poor.

Gu maize harvest in most parts of *dhesheks* and agropastoral areas of Lower Juba is expected to be collected in August as usual (particularly in Jammame, Kismayo and Badhadhe areas). Off-season harvest is expected in parts of Lower Juba *dhesheks* and the Gedo riverine by late September-early October.

In northwestern Somalia, planted areas were reported to be below normal, due to delayed Gu rains resulting in late planting. The condition of the established crops (yellow maize), are poor to average. However, cereal production, particularly for white sorghum, will depend on the performance of the *Karan* rains, which are expected to begin in late July. Similarly, in the Togdheer Agropastoral area, the established crops are in poor condition due to inadequate Gu rains, with the exception of Odweyne district where crop establishment is average due to the occurrence of moderate rainfall.

Cereal prices have been increasing abnormally from January to May 2014 in all southern regions of Somalia. Maize prices increased at high rates (17-51%) in the Gedo, Bay, Lower Juba, Middle Juba and Lower Shabelle regions, while they have escalated drastically (72-139%) in the Bakool, Middle Shabelle and Hiran regions. Similarly, sorghum prices have risen significantly (by 31% on average) in the Sorghum Belt, while increasing only at mild rates (7%) in the Shabelle valley. The highest increase in sorghum price was noted in Bakool (72%) and Hiran (38%) regions. Compared to the previous year, the local cereal prices in May 2014 generally show high rates of annual increase as a result of below average *Deyr* 2013 harvest, reduced humanitarian assistance and less than promising *Gu* 2014 cereal harvest prospects.

LIVESTOCK

Pasture, Water and Livestock Migration

The pasture, browse and water conditions in most parts of the pastoral and agropastoral areas in the north have improved as a result of near average *Deyr* 2013 and *Gu* 2014 rains. Exceptions are large areas in the Bari region (Dharoor Valley, East Golis and Coastal *Deeh*), parts of the Sanaag (East Golis, Gebi and Guban), Toghdheer (parts of the Hawd pastoral and agropastoral areas), Sool (parts of Hawd) and Wooqoi Galbeed regions (parts of agropastoral in Gabiley and Hargeisa) where pasture and water conditions vary from below average to poor as a result of poor *Gu* rains.

In the south-central regions, *Gu* rains were either below average or poor in the Hiran (agropastoral livelihood), Lower Shabelle (Coastal *Deeh*), Bakool (Southern Inland Pastoral), Gedo (Southern Agropastoral and Dawa Pastoral areas) and Middle Juba regions (Southern Agropastoral), leading to below average to poor pasture/ browse and water conditions. As a result, pasture and water depletion is likely to occur in these areas over the course of the *Hagaa* dry season (July-September 2014). However, pasture and water shortages in the rain deficit areas along the coast of Lower Shabelle (Hagaa) and in the agropastoral area of Gabiley (Karan) is expected to be alleviated by Hagaa (June-July) and Karan (July-August) rains that are normal to these areas.



Average camel condition with medium calving. Sool Plateau, Bari region, FSNAU, June 2014

Livestock migration for most parts of the country was

indicated to be normal, with movements confined to the original livelihood zones and/or into adjacent zones with better pasture and water conditions. During May there was abnormal livestock in-migration to the Sool Plateau and upper Nugal of the Sanaag region from parts of the Sool Plateau in the Bari region and from other rain deficit livelihood zones in the Sanaag, Sool and Togdheer Regions (Golis/Gebi/Guban and parts of Hawd). Similarly, pastoralists from areas with poor rainfall in Gedo and Bakool have migrated to adjacent regions with better rainfall in Juba and Bay.

Livestock Condition, Production and Reproduction

In most of the pastoral and agro pastoral livelihood zones across the country, livestock body conditions improved to levels of average to above average, equivalent to a score of 3-4 using the Pictorial Evaluation Tool (PET) scale of 1 to 5. Exceptions to this are observed in the rain deficit areas (see above) where the body conditions of livestock varied from below average to poor (PET 1-2). Low to medium kidding/lambing of goats/ sheep and low to medium calving of cattle (in March/April) and camel (as from June) is reported across the country. However, as a result of the delayed *Gu* rains, mild abortion rates of small ruminants occurred in April in the Sool Plateau and Hawd of northern regions. Consequently, milk availability is expected to be near normal to normal in most parts of the country over the next six months, with the exception of the rain deficit areas mentioned above, as well as in parts of the northeast (parts of Sool Plateau and Coastal *Deeh*) where large numbers of livestock were lost during the cyclone in November 2013.

Livestock prices/ exports

Livestock prices for all species showed mild increases or stable trends in between January to May 2014 in most markets. Annual comparisons indicate declines in local quality goat price, with the largest drop (22 percent) in the Hiran region due to oversupply of livestock with poor body condition from the agropastoral livelihood areas. The value of big ruminants gained in most regions. Livestock prices are higher compared to the five-year average levels in most regions. In the first quarter of the year (January-March 2014), approximately 830 705 heads of livestock were exported through Berbera (67 %) and Bossaso ports (33 %) [Figure 3]. This figure is higher (by 6%) compared to the same period last year (778 776 heads).





MARKETS AND TRADE

Exchange Rate Trends

The Somali Shilling (SoSh) made modest gains of approximately ten percent in early 2014, but has held steady against the United States dollar (USD) since February, trading at around 18 000 SoSh in May in Mogadishu's main Bakara market. Earlier appreciation is due to the improving market environment as a result of the increased monetary inflow through intergovernmental aid, foreign direct investment and remittances from Diaspora communities. Compared to a year ago the SoSh is largely stable in many parts of the SoSh-using areas. Over the two reference periods, the Somaliland Shilling (SISh) to USD exchange rate was relatively stable across most markets of the SISh-using area.

Cereal Imports and Commodity Price Trends

From January-May 2014 the average prices of most essential imported commodities such as rice, wheat flour, diesel fuel, sugar and vegetable oil were generally stable in most main markets in the country due to the ample supply from

the ports and relatively stable exchange rates (Figures 4 and 5). Exceptions are markets in Lower Shabelle and Bakool regions where conflicts and multiple extortions by militia have continued to impact commodity movements. Consequently, in May 2014, for example, imported red rice and sugar retail prices in the main Qorioley and Hudur markets were on average 50 to100 percent higher than in January 2014 and 54 to 75 percent higher than in the same period last year. Most food price levels in these markets are reminiscent of the 2008 food crisis and 2011 famine peaks. The average annual price changes from May 2014 indicate that the prices of the above-mentioned imported items are stable or slightly lower in the rest of the country. Strong shilling and good global production have contributed to reduced domestic prices of these commodities in the past one year.

The cross border exports of sorghum and maize from Ethiopia to Central and Northern Somalia almost doubled (2 358 MT) between January to May 2014 compared to the same period last year due to below average *Deyr* 2013 production, which limited supplies from cereal producing regions in southern Somalia. However, re-exports of rice, sugar and wheat flour from Somalia to Ethiopia and Kenya continued, but on higher volumes on account of comparatively higher returns.

Consumer Price Index (CPI)

The Consumer Price Index (CPI) for urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), indicates moderate increases (12%) in the cost of living in urban areas of southern Somalia over the past five months. This reflects the seasonal increases in the prices of sorghum (accounts for a significant proportion of the MEB) as a result of reducing farmer stocks during the current lean season (April-June). The CPI is stable in the Northern parts of the country, however has been significantly higher over the May 2013-May 2014 period in most parts of the country, particularly in southern Somalia (by 27%), due to increased cereal prices (Figure 6).













NUTRITION SITUATION

The integrated nutrition situation analysis conducted by the FSNAU and partners in January 2014 indicated a *Serious* nutrition situation across most livelihood regions in Northwest, Northeast and Central zones of Somalia with the exception of the Sool Plateau and Addun livelihoods in the northeastern/central regions, which were classified at the *Alert* level. In the South, the nutrition situation has been classified as *Critical* in the following regions and groups: Bakool Pastoral Bay Agropastoral, and Beletweyne District (Hiran) regions, the Kismayo, Dolow Iand Dhobley IDPs. Conversely, the nutrition situations in northern Gedo (Riverine, Pastoral, Agropastoral), the Baidoa IDPs, Middle Shabelle and Hiran (Mataban district) were classified as *Serious*. In the Lower Shabelle and Bakool Agro-pastoral regions, nutrition assessments could not be conducted due to prevailing insecurity, while the available health facility data was insufficient towards classifying the nutrition situation in these areas (*source: Nutrition Technical Series Report, March 2014*).

A review of the nutrition data collected from health facilities across Somalia for the January-April 2014 period showed variation, with persistence of Critical-Very Critical levels of acute malnutrition reported in South central regions and increasing trends of acute malnutrition reported in NW Agro pastorals, Hawd and Addun livelihoods in North and Central regions (Table 1).

Health facility data from the South indicated a high levels (>15%) of acutely malnourished children as reported in health facilities from all livelihood. In addition, field reports indicated a seasonal increase in cases of acute watery diarrhoea, displacements and reduced humanitarian access in southern regions as caused by civil insecurity. This represents a key aggravating factor to nutrition situations in these regions, however increased access to milk in all livelihoods following onset of Gu rainfall is expected to mitigate the malnutrition situation to some extent.

In the Northwest, health facility data indicated low levels (<10%) of acute malnutrition with the exception of the Agropastoral and Hawd livelihoods, where high (>15%) and moderate (>10%) levels are recorded respectively. Sporadic cases of diarrheal diseases, acute respiratory infections (ARI) and measles reported in the Northwest, especially in the Sool region, are likely to aggravate the nutrition situation in the affected livelihoods. However, the reported increasing milk access and consumption across livelihoods in the Northwest is expected to mitigate the nutrition situation.

Health facility data from Northeast and Central show varying levels of acute malnutrition ranging from a low (<10%) in the Sool Plateau and Nugal Valley to a high (>40%) in the Hawd and Addun livelihoods regions in central Somalia. A measles outbreak was reported by the Ministry of Health (MOH) surveillance system, and was especially prevalent in central Somalia) while a seasonal increase of watery diarrhea was reported in association with the onset of Gu rainfall in Central and Northeast. These are key factors aggravating malnutrition in northeast and central regions.

REGION	MCH CENTERS		HEALTH FACILITY DATA JANUARY-APRIL 2014					
		SOUTH						
Вау	Degroor Medical organization, Badbaado Medical Organization, Degaras Health Organization, Baidoa Referral hospital			High >30% and stable trend				
Bakool	Gasweyne- Hudur district Biyooley- Teiglow district				High >30% and stable trend			
Juba pastoral	Afmadow APD ,Dobley APD	High >20% and increasing trend						
Juba agro-pastoral	Jamame Muslim AID ,Badhadhe SRC	High >20% and stable trend						
Juba riverine	Mugambo SRCS ,Buale JCC	High >20% and stable trend						
Gedo Pastoral	SRCS, Elwak/Bardera (Pastoral) Troc	High >15% and stable trend						
Gedo Riverine	AMA Bardera (Riverine) HIRDA Barde	High >20% but decreasing trend						
Gedo Agropastoral	HIRDA Bardera (Agro pastoral), Troca	High (>20%) and Fluctuation						
Banadir	Medina, Waberi, Hamarweyne, Hamarjajab Zamzam				>20% and stable			
L Shabelle Agropastoral	Shalambod,Kurtunwarey,Brava	>20% increasing trend						
Shabelle Riverine	Qoryoley				No report			
Hiran				No report				
NORTH WEST								
West Golis/Guban	Lughahya, Lowyado, Garbodadar, Boon, Geerisa, Darbudhug, Mandera, Harirad, Abdikadir				Low <10% and stable			
East Golis	Hadaftimo, Kulmiye, Barwago, Gar-adag, Badhan				Low <10% and fluctuating			
Sool Plateau	Awrbogays, dharhar, Hingalool, Elafweyn				Low < 10% and stable			
Nugal Valley	Lasanod Central, Daami, Farxaskule, Taleh, Huddun, Yagori, Ainabo				Low >10% and decreasing			
Agro-pastoral	Odweine, Sheikh, Gebiley, Dilla, Allaybaday, Idhanka, Qolijeed				High (>15%) and increasing			
Hawd	Kalabayd, Buhoodle, Salahlay, Bali-Gubadle, Haji Salah, Adadlay, Durugsi, Buhodle, Balidhig Moderate (>10%) and inc				ate (>10%) and increasing			
NORTH EAST and CENTRAL								
Hawd central	Abudwag and Galinsor >50% and decrease				and decreasing trend			
Aduun Central	Dusomareb and Adaado			<40 and stable				
East Golis	Ufeyn, Carmo, Calula, Iskushuban			Moderate >10% and decreasing				
Sool plateau	Qarhis*, Dangaroyo, Rako, Waaciye			Low <10 % and stable trends				
Nugal valley	Sinujiif, Gambool and Waaberi			Low <10% and decreasing trend				
Coastal Deeh	Eyl, Bayla, Bargal, Hafun			Moderate >10% and Stable				
Hawd NE	Kalabayr, jalam, Bacadweyn, Harfo				Moderate >10 % and increasing trend			
	Burtinle*, Goldogob, Hasbahalle							
Addun NE	Godob, Ballibusle, Jariban			Moderate <10 % and increasing trend				
Key for interpretation of health facility data								
Acceptable	Alert	Serious	Critical		Very Critical			
V. low (<5%)	$L_{\rm out}$ properties (E to <10%)	Moderate (10 to <15%) and	High $(> 15\%)$ and stable		High (> 15%) and increasing			
proportion in the	Low proportion (5 to < 10%)	stable or low (5 to <10%)	Fight (> 15%) and stable		Fight (> 15%) and increasing			
preceding 3months	and stable trend in the	but increasing proportion in the preceding			proportion in the preceding			
relative to >2yr	preceding 3 months relative to	the preceding 3mths relative	smins relative to >2 yr	3 months relative to >2yr				
seasonal trends	>2 yr seasonal trends	to >2vr seasonal trends	seasonal trends		seasonal trends			

Table 1: Nutrition situation as per reports from health facilities

In the month of May, FSNAU and partners started the Gu nutrition assessments among the displaced populations while the countrywide nutrition surveys in the urban and rural livelihoods will be undertaken in June-July 2014.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In January 2014 FSNAU and partners projected the food security situation in most towns were as **Stressed** (IPC Phase 2) between February to June 2014 based on analysis of cost of living, economic activities, labour opportunities, purchasing power of the urban poor as well as food security situation in surrounding rural livelihoods. The trends of the past five months for the above-mentioned contributing factors of food security situation are presented below.

In the January-May 2014 period, the cost of the Minimum Expenditure Basket (CMB) increased modestly in local currency terms in the main urban markets of most regions (Table 2). Conversely, areas in Central (Galgadud) exhibited declines in the cost of the CMB, while in the North (most regions) it remained relatively stable. Dramatic increases in the CMB were recorded in Bakool region (51%), followed by Hiran (21%). This trend is mainly attributable to the prevailing insecurity and trade embargo imposed by the insurgents in the main towns of these regions in March 2014. A significant ten percent increase in the CMB was also recorded in Middle Shabelle, which was mostly driven by a major surge in cereal prices since January 2014 (see rural integrated analysis "Southern Regions" article). Annual comparisons (to May 2013) indicate significant increases in the minimum cost of living in most regions, particularly in the South. On average, the CMB increased by 31 percent in the South (excluding Banadir where it rose slightly - by 5%); by 13 percent in Central; and by seven percent in the North. The highest increase was recorded in Bakool (72%), followed by Hiran (36%) and Middle Shabelle (32%). The annual gains in the minimum cost of living were mostly driven by the increase in local cereal price, which comprised 40 percent of the total basket cost. For example, the annual gain (compared to May 2013) in the price of red sorghum (the cereal included in the MEB) in the South was equivalent to 70 percent on average, while the highest increase (136%) was exhibited in the Bakool region.

As shown by urban surveys in Somalia over the past few years, casual labour (e.g. portage, construction) was a significant source of income for the urban poor. The FSNAU market monitoring information indicated improved or relatively stable casual labour wages in most regions in the January-May 2014 period. In conflict-affected urban areas of Bakool, Lower Shabelle and Banadir deviation in the wage rate trends was noted whereby wage rate trends changed only marginally since the beginning of the year (January-May 2014) in contrast with significant increases over the past five-years (2009-2013) (by an average of 20-

Zone	Region	MEB Cost (Local Currency)	%Change from		
		May '14	Jan-14	May-13	
Central	Galgaduud	2,979,080	-10%	10%	
	Mudug	2,492,900	6%	16%	
	Bari	3,612,220	0%	5%	
North	Nugaal	3,891,625	3%	14%	
North	Sanaag	4,663,550	2%	9%	
	Sool	4,329,625	1%	10%	
	Togdheer	931,275	0%	-1%	
North(SISh)	Awdal	837,031	-1%	-1%	
	Woqooyi Galbeed	1,096,975	-2%	15%	
	Bakool	2,924,406	51%	72%	
	Вау	1,766,313	5%	20%	
	Gedo	2,467,913	9%	21%	
Ocuth	Hiraan	2,569,750	21%	36%	
South	Lower Juba	2,731,753	5%	22%	
	Lower Shabelle	2,119,457	9%	27%	
	Middle Juba	2,211,983	6%	17%	
	Middle Shabelle	2,134,000	10%	32%	
Mogadishu	Banaadir	1,833,000	4%	5%	

Table 2 : Minimum Expenditure Basket

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



Figure 8: Regional Trend in Terms of Trade Cereal to



30% for Bakool and Lower Shabelle and by 14% in Banadir). This discrepancy suggests a lack of labour opportunities in 2014, which may be attributable to the disruption of economic activities caused by prevailing conflict as well as recent inflows of IDPs and the return of refugees to the Banadir area. In SoSh areas, the lowest wage rate in May 2014 was recorded in Middle Shabelle (60 000 SoSh) as in the last year, while the highest was in Gedo (180 850 SoSh). Wage rates ranged from SISh 36 000 to 55 000 in the North SISh areas.

The Terms of Trade (ToT) between daily labour (unskilled) wage and cereals, which approximates the actual purchasing power of the urban poor, declined in most regions of South-Central since January apart from Gedo region where it increased marginally. The most significant declines were recorded in Bakool (by 43%) and Middle Shabelle (by 46%) regions. The ToT remained unchanged in the northern regions during the same period. The highest nominal ToT between labour and cereal in the month ending in May 2014 were observed in the Bay and Gedo regions (17kg/ daily labour wage), while the lowest were in the Bakool and Central regions (4kg/daily labour wage). The annual comparison also indicated a downward trend in ToT in most southern regions (apart from Gedo with a marginal increase), while it remained constant in Central and Northwest and increased in Northeast (Figures 7 and 8). The drop in ToT was driven primarily by the increase in cereal prices. The largest annual declines (by 6kgs of cereals/ daily labour) were noted in Bakool and Hiran, while marginal changes were observed in Middle Shabelle and Gedo regions. The ToT remained constant in northern regions.

RURAL

Northern Regions

In post *Deyr* 2013/14 analysis by FSNAU and partners, all rural livelihoods in the Northern regions were classified as **Stressed** (IPC phase 2) between February to June 2014, excluding Cyclone affected areas of the Northeast (parts of Sool and Coastal *Deeh*), which are in **Crisis** (IPC Phase 3).

As a result of below average to average (yet delayed) *Gu* rains, rangeland and water resources have improved in most of the livelihood zones. However, pasture and water conditions are below average/ poor in the areas where *Gu* rains were diminished and erratic. Such areas include large parts of the Bari (Coastal *Deeh*, East Golis and Karkar/Dharoor livelihoods), Sanaag (East Golis of Laasqoray and Gebi Valley), North Mudug (Coastal





Deeh of Jarriban) and Togdheer regions (agropastoral and localised areas of Hawd Pastoral in Buhodle and Burao districts) as well as the Woqooyi Galbeed region (agropastoral of Gebiley district).

Livestock body condition remains largely average in most of the North (PET score of 3) due to improved pasture and migration options. However, body conditions of lactating animals and the livestock in the rain deficit areas (see above) are below average. Medium kidding/lambing of goats and sheep occurred during the current Gu season in most of the northern rural livelihood zones. Camel and cattle that conceived in the 2013 Gu and Hagaa seasons started to calve at low to medium rates from June, while calving is expected to continue up to the end of August 2014. Consequently, milk availability is expected to be near normal to normal in most areas, with the exception of the above mentioned rain deficit areas as well as areas in the Northeast, which were affected by

Figure 10: Regional Trend in Terms of Trade Cereal to Local Quality Goat



cyclone (parts of Sool Plateau and Coastal *Deeh*) during November 2013, which led to significant livestock death. Camel holding amongst the poor pastoralists in most of the northern regions is projected to be at baseline or above baseline levels by the end of June 2014 with the exception of Coastal *Deeh*, where it remains below baseline levels. Herd size of small ruminants and cattle in agropastoral areas are expected to remain below baseline to near baseline levels, until June 2014.

In the agropastoral areas of the Woqooyi Galbeed and Awdal regions, yellow maize and sorghum crops planted during the *Gu* season are in average to poor conditions. This is due to late and below normal planting following delayed and erratic *Gu* rains in these areas. However, *Gu* cereal production is secondary in quantity to the major (*Karan*) cereal harvest, which is collected in October-November. To a limited extent, projected near average to below average *Karan* rains (July-August) [see Climate Sector] may improve the prospects of the long-cycle white sorghum crops, which is usually harvested in October-November. In Togdheer Agropastoral, the crop establishment is below average in most areas due to below normal *Gu* rains with the exception of parts of the Odweyne district where it is average as a result of moderate rains. If additional rains are not received in June 2014, the overall crop establishment is likely to deteriorate from average to poor in the region. Regeneration and production of natural grass fodder in Togdheer Agropastoral is also below average, which implies reduced labor and self-employment opportunities to poor households in this livelihood zone. Watermelon and tomatoes were planted/established in depressed (lowland) areas.

From January to May 2014, average local quality goat prices showed mild to moderate gains in the markets of Northeast (7%) and Northwest (12%) as a result of increased demand for livestock in the wake of the holy month of *Ramadan* (June-July 2014) [Figure 9]. In the



Average camel condition and pasture. Hawd, Toghdheer region, FSNAU, June 2014

same period, imported rice prices either declined marginally or remained stable across the northern regions. Reflecting these trends, the ToT between local quality goat and imported rice either increased at varying degrees in different northern regions or remained stable (in most regions in the Northeast). The exception is the Togdheer region (Burao market) in the Northwest where ToT declined by five units between January and May 2014 (70kg/head), as a result of depressed goat prices caused by oversupply on the markets (to cover debts for water trucking during the prolonged Jilaal), particularly from the Hawd livelihood region. In May 2014 the ToT between goat and imported rice varied from region to region, amounting to 107-121kg/head in the Northeast and 52-93kg/head in the Northwest (Figure 10). Households in Northeast and Northwest were also reported to consume primarily locally produced cereals – red sorghum in the Northeast (supplied from southern Somalia) and white sorghum in the Northwest (produced locally). The ToT between local quality goat and red sorghum in Northeast (Bari and Nugal regions) remained stable at 70-85 kg/head from January to May. The ToT between local quality goat and white sorghum increased in most regions of Northwest, except in the Togdheer region where it declined as a result of reduced goat prices. In May 2014, the ToT white sorghum/head value ranged from 69kg/head (Zeylac market) to 111kg/head (Hargeisa market). On average, the ToT between local quality goat and local cereals in the Northwest (white sorghum) and Northeast (red sorghum) regions showed annual declines of 16-17 percent (from 110kg/head to 92 kg/head and from 82 kg/head to 68kg/head, respectively). The ToT between local quality goat and rice increased in the Northeast (by 11 units), but declined in the Northwest (by 6 units) from a year ago (since May 2013).

Central Regions

In post *Deyr* 2013/14 analysis by FSNAU and partners, the Coastal *Deeh* was identified as in Crisis (IPC Phase 3) between February to June 2014. All other livelihood regions in the Cowpea Belt, Hawd and Addun regions were identified as Stressed (IPC Phase 2).

As a result of late and erratic *Gu* rains pasture, browse and water availability is predominantly below average in Hawd and varies from below average to average in Addun and the Cowpea Belt. However, in the Coastal *Deeh* livelihood, which mostly remained dry throughout the season, rangeland conditions were observed to be poor. Currently, livestock body conditions are near average to below average (PET 2-3) in all the livelihood zones, however, this is likely to deteriorate during the



Near average sheep body condition. Coastal Deeh, South Mudug, FSNAU, June 2014

forthcoming *Hagaa* dry season (July-September) when pasture and water resources are expected to reduce further. Medium kidding for goats/sheep was reported during the *Gu* season, while low camel birth rates are expected in June/July 2014. Milk availability is below average due to poor pasture and reduced milk yield for lactating animals. However this is expected to improve slightly from July onwards, following the anticipated camel calving. Although camel milk price declined marginally (by 2%) in May compared to January 2014, it is 16 percent higher compared to a year ago (May 2013). In the Hawd and Addun pastoral livelihood regions, camel holding of poor households is above baseline while for sheep/goat it is near baseline. In the Coastal *Deeh* and Cowpea Belt livelihoods, holdings of all livestock species were below baseline levels. The cowpea crop performed poorly due to delayed and erratic *Gu* rains in agropastoral livelihood regions (Cowpea Belt) of Central Somalia, which resulted in successive germination

failure and moisture stress in pocket areas where crops had germinated. Consequently, cowpea harvest is likely to be below average/poor in the Cowpea Belt. In a normal season, poor households' cowpea stocks would last for approximately three to four months and typically represents 60 percent of total household food production. Thus, the cowpea crop is an essential livelihood crop for poor households.

From the January-May 2014 period, local quality goat prices increased by 16 percent in the Coastal Deeh/Cowpea Belt, while it remained stable in the Hawd/Addun livelihood zones. This trend is attributable to the start of live animal stocking by traders for the upcoming Ramadhan period (July) and relatively low livestock holding in the Cowpea Belt/Coastal Deeh livelihoods compared to the other two livelihoods. Yearly comparisons indicate declines in local quality goat prices both in Hawd/Addun (by 7%) and in the Coastal Deeh/ Cowpea Belt (by 24%) [Figure 11]. Rice prices remained stable in the Coastal Deeh/Cowpea Belt but increased slightly (by four percent) in the other two livelihood zones, while yearly trends of rice price show almost stable levels in Hawd/ Addun. Rice prices increased by 16 percent in the Hawd/ Addun livelihoods. Increased goat prices and stable rice prices during the January-May 2014 period led to the gains in ToT between local quality goat and rice in the Coastal Deeh/Cowpea Belt (from 48kg/ head in January 2014 to 55 kg/head in May 2014). In Hawd/Addun the ToT declined marginally (from 61 kg/head in January 2014 to 60 kg/head in May 2014). Red sorghum prices declined by 15 percent in the





Figure 12: Regional Trend in Terms of Trade Cereal to Local Quality Goat



Coastal *Deeh*/Cowpea Belt, but remained stable in the other two livelihoods over the past five months. Red sorghum prices increased significantly (35% and 20% respectively) year-on-year (compared to May 2013) in both livelihoods. The ToT between local quality goat and red sorghum increased or remained stable in most livelihood zones of the Central region in the first five months of the year. As of May 2014, the local quality goat/red sorghum ToT was 82kg/head in Hawd/Addun, which showed stable rates since January 2014. ToT increased significantly (by 37%) in the same period from 81kg/head to 111kg/head in Cowpea Belt/Costal *Deeh* (Figure 12).

Southern Regions

In post *Deyr* 2013/14 analysis by FSNAU and partners, most rural livelihoods of the southern Somalia regions were classified as Stressed (IPC Phase 2) between February to June 2014. However, the Southern Agropastoral livelihoods of Middle Juba and parts of the Middle Shabelle riverine (Jowhar) were classified in Crisis (IPC Phase 3) for the same period. According to the *Gu* 2014 preliminary forecast, the poor food security situation for the agropastoral livelihoods of Hiran, Bakool and Northern Gedo regions have been exacerbated by rainfall deficit and armed conflict.

The Gu 2014 cereal harvest is likely to be below average in most parts of southern Somalia, primarily as a result of the late and below average to poor Gu rains in most regions, as well as civil conflicts which erupted during the Gu seasonal activities. Other factors such as limited access to inputs and alterations in cropping patterns with increased sesame

cultivation (in lieu of cereal cropping) have also contributed to reduced cereal crop production (see Agriculture sector). The harvest situation is likely to be worse in the Hiran (both riverine and agropastoral), Middle Juba (Southern Agropastoral), and Bakool regions, in addition to some agropastoral areas of the northern Gedo region. In May, there was sufficient rainfall to allow for improved livestock grazing and browsing, as well as migration opportunities. As a result, rangeland conditions, livestock production and reproduction were enhanced across southern Somalia. Cereal stocks for most poor riverine and agropastoralist households have been depleted and presently, the majority of these households are tightly dependant on market-based food purchase.

Figure 13: Regional Trends in Cereal Prices (SOSH/SLSH)



Cereal prices exhibited an increasing trend between January to May 2014 in all southern regions (see Agriculture Sector), whereas farm labour wage rates reflected varying trends (Figure 13). In regards to rural market data, daily agricultural wage rates increased in most agropastoral areas, with the exception of Hiran and Juba regions where agricultural wage rates decreased by 14 and 24 percent, respectively, but remained stable in the Middle Shabelle region. This trend is reflective of increased agricultural activities coinciding with the onset of Gu rains. The highest agricultural daily wage (189 166 SoSh) was recorded in Gedo, while the lowest earnings were reported in Juba (31 250 SoSh/day) and Middle Shabelle (35 000 SoSh/day) regions. In the riverine areas such as Middle Shabelle, wage rates remained stable but declined sharply (24%) in Juba regions due to delayed rains and civil conflict. Consequently, ToT labour and cereal also showed mixed trends in the January-May 2014 period. For instance, ToT between daily labour wage and cereal increased in Bay and Gedo (red sorghum) by 50 percent and 38 percent respectively, while they declined by 30 percent in Hiran (white sorghum) and by nine percent in the Bakool region. The highest ToT values in May 2014 were recorded in Bay (24kg/ labor wage) and Gedo (18kg/labour wage) due to favourable labour wages and lower cereal prices. The lowest ToT values were observed in Middle Shabelle and Middle Juba (3-5kg/labour wage each), due to maize scarcity in the

Figure 14: Regional Trends in Local Quality Goat Prices (SOSH)



Figure 15: Regional Trend in Terms of Trade Cereal to Local Quality Goat



markets as a result of meagre harvest in the last 2013/14 *Deyr* and reduced supplies from Lower Shabelle due to market disruptions caused by armed conflict. Compared to the same period last year (May 2013), labour /cereal ToT decreased in all parts of the southern region, except in Gedo where it increased (by 4 units). The largest yearly decrease in the labour /cereal ToT was recorded in Middle Juba (50%) and Lower Shabelle regions (58%). Labour/ cereal ToT in Gedo is the only region exhibiting favourable purchasing ability in May 2013.

Livestock prices (local quality goat and cattle) exhibited mild to moderate increases for the January-May 2014 period in most southern markets (Figure 14). The highest goat price (2 025 000 SoSh/goat) for May 2014 was reported in Marka (Lower Shabelle) while the lowest (762 500 SoSh/goat) was reported in Hudur (Bakool). The ToT between goat and cereal prices showed declining trends between January to May 2014 in all southern markets (Figure 15). Thus, ToT decreased by an average of 23 percent in the Sorghum Belt regions (Bay, Bakool, Gedo, Hiran) and by 34 percent in the Shabelle and Juba regions since January 2014. The highest ToT in May 2014 was recorded in Bay (270kg/head), with the lowest in Bakool (55kg/head), followed by Hiran (74kg/head). The yearly comparison indicates decreases in ToT across southern regions, with a substantial decrease of 44 percent observed in the Sorghum belt, a 38 percent decrease in the Shabelle valley and a moderate decline of 21 percent in the Juba region. These decreasing ToT trends reflect the increase in cereal prices.

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