

Issued June 18, 2010

Food Security & Nutrition

Quarterly Brief - Focus on Gu Season Early Warning



The overall food security situation outlook is favourable for most livelihoods of Somalia, as a result of good *Gu* rainfall performance. The average to above average rains received in most parts of the country considerably improved pasture and water conditions in pastoral areas and contributed to average crop performance. As a result, livestock conditions have improved across the country,

while cereal production is expected to be average to above average in main cereal producing areas. However, the floods caused by the excessive rains had devastating effects on the Juba Riverine livelihood where many farmers suffered from considerable damage to the standing crops from early *Gu* planting. The floods have also resulted in temporary displacement of the population in five different districts of southern Somalia. Nevertheless, sustained conflicts in the country continue to be the primary reason of displacement, affecting mainly southern and central parts of Somalia. Civil insecurity has increased food insecurity by disrupting market supply and delivery of humanitarian aid, primarily affecting the urban and internally displaced population (IDP). Recent nutritional assessment indicated a **Very Critical** situation with increased malnutrition levels in Addun Pastoral areas of Central, which has recently seen a lot of displacement due to civil insecurity.

Key Issues and Early Warning for July to December 2010

Normal Crop Production for Gu Expected in Southern Regions

Prospects for crop production are good in most parts of southern Somalia as a result of good rainfall. Overall production of sorghum and maize are expected to be normal in most areas. The exceptions are Juba regions, where floods in May brought significant damage to the standing maize crops. The severity of the situation means that the poor population in the affected communities of Juba riverine are likely to be in crisis in the short term or at least until the off-season harvest in October. Gu cereal production in Hiran region is also expected to be below normal due to limited rainfall received in agropastoral and riverine livelihoods of the region as well as floods in some parts of riverine. Considering other negative factors affecting the region, such as limited humanitarian access, recent displacement due to floods and conflicts, with the latter also causing disruptions in market supplies, Humanitarian Emergency is likely to sustain in the region at least up to the end of the year. Local cereal prices (maize and sorghum) have exhibited upward trends in most regions of southern Somalia in the last 6 months in line with normal seasonal patterns. The price rises in most southern regions also reflect the impact of reduced supply which resulted from below average Deyr 2009/10 production in certain regions (Shabelle, Hiran, Gedo). Market price rises are also attributable to disruptions in market supply due to insecurity combined with the food aid suspension in the South.

Good Seasonal Performance and Signs of Improvement in Central and North

Key pastoral areas of central Somalia finally came out of the protracted drought of the last five seasons as a result of unseasonal rains during *Jilaal* period and normal to above normal *Gu* rainfall. The rains were also favorable in most parts of the Cowpea Belt Agropastoral of Central. Similarly, the seasonal performance was largely positive in the North, including

	Hagaa Dry Season			Deyr Rains			Jilaal Dry Season			Gu Rains		
	Jul 2009	Aug	Sept	Oct	Nov	Dec	Jan 2010	Feb	Mar	Apr	Мау	Jun
Goo proc Incr Dete acce	od off-sea duction in eased nu eriorated ess in Ce	son Juba regior mber of IDP urban food ntral.	Early s rains in and No phenot floods and Sh	tart of <i>Deyr</i> Central orth; El Niño menon and in the Juba nabelle rivers	Ave No in t cris	erage Dey rmal crop he South; ses in Cer	r season; prospects Sustained tral.	Mile with par of C Sou	d <i>Jilaal</i> dry n rainfall in ts of Soma Gu planting uth and Nor	season most lia; start in the rthwest.	Above a Gu rain pasture across promote establis	average s improve and wate Somalia a e a good c hment.

Somalia Seasonal Timeline & Key Events

Climate

Markets

Nutrition

Agriculture

Livestock

Civil Insecurity

Emerging Regional Issues

FSNAU - Somalia

United Nations Somalia, Ngecha Road Campus Box 1230, Village Market, Nairobi, Kenya Tel: +254-20-4000500 Cell: +254-722-202146 / 733-616881 Fax: +254-20-4000555 Email: info@fsnau.org Website: www.fsnau.org drought affected areas of Sool Plateau and Togdheer Agropastoral. As a consequence, water sources have replenished resulting in cessation of water trucking in pastoral areas of central and northern Somalia. Pastures have also recovered fully prompting the return of most outmigrated livestock. As a result, body conditions of sheep and goat have significantly improved and increasing rates of lambing and kidding have been reported with prospects of further increases in the next two months. The positive effects of these developments have already been seen in the decrease of milk prices in these zones and the increase number of export quality animals available for trade with Saudi Arabian and other Gulf markets. In view of the current positive trends, the food security situation is expected to improve in the North. However, because the drought continued for so long and severely depleted livestock assets, a full recovery will take several sequential good seasons.

Protracted Conflict in Somalia Continues to Result in Displacement and Limited Humanitarian Access

The IDP numbers continue to increase due to prevailing insecurity in southern and central Somalia. According to the latest Inter-Agency Standing Committee's Population Movement (IASC) Tracking update over 50,000 people were displaced in the last two months alone. Most of the displacement is attributed to insecurity in Mogadishu, Central and Hiran as well as to recent clashes in the Northwest (Togdheer region) between local militia and Ethiopian forces. In addition to risks of human rights abuses and social exclusion, many of the displaced people are facing challenges of inadequate food, poor shelter and lack of access to basic services. Unfortunately, there are a disproportionately higher number of IDPs in southern and central Somalia and these groups are not receiving aid due to the restricted humanitarian access in these areas. According to the United Nations Office of Coordination for Humanitarian Affairs (OCHA), the international staff presence in the South and Central has shown a gradual increase since February, but their numbers are still insignificant compared to one year ago.

Reduced Cost of the Minimum Basket To Improve Food Access in Urban Areas in Central and North Over the last two months the Cost of the Minimum Expenditure Basket (CMB) has shown a modest decline in central and northern Somali Shilling (SoSh) areas, while remaining stable in the South and the Somali Land Shilling (SISh) areas. The decline is largely attributed to a slight reduction of sorghum, sugar and milk prices in the mentioned period. The highest CMB in SoSh areas in May was observed in the North while the lowest was in the South due to large disparities in the prices of sorghum, the main component of the basket. The reduced CMB gives an indication of improving food access for the urban population, who largely rely on food purchases. However, access to income by the urban poor in southern and central Somalia continues to be challenged by on-going conflicts, significantly diminishing livelihood opportunities by disrupting market activities and trade.

SECTOR HIGHLIGHTS

CLIMATE

Map 1: Cumulative Rainfall Estimates (March to May 2010)



Source: National Oceanic and Atmospheric Administration (NOAA)

 W0A
 SHAAQ
 BR

 W0A
 SHAQ
 BR

 W0A
 MUA
 BR

 W0A
 MUA
 SHAQ

 W0A
 HEW
 0.00-0.05

 0.055 - 0.10
 0.055 - 0.10

 0.10 - 0.20
 0.20 - 0.30

 0.30 - 0.40
 0.40 - 0.50

 0.50 - 0.60
 0.60 - 0.70

 0.50 - 0.60
 0.60 - 0.70

 0.70 - 1.00
 0.70 - 1.00

Map 2: NDVI 1st Dekad for June 2010

Source: National Oceanic and Atmospheric Administration (NOAA)

Bad Data

Rainfall during Gu season

2010 *Gu* rainfall began in early April following unseasonal rains that fell towards the end of the *Jilaal* (February-March) season. The *Gu* rains were of various intensities, duration and coverage in most parts of the country with normal to above normal performance throughout the season (Map 1).

In the North, substantial and well distributed rains were received in most parts of Awdal, W. Galbeed and Toghdeer rgions, while moderate precipitation fell in Nugal valley, Sanag and western parts of Sool regions. Similarly, parts of Golis and Hawd zone of Togdheer have received moderate rains. Heavy precipitation also fell in Alula, Qardho and Bargal towns of Bari region during the second dekad of May. However, rains were sporadic and localized in pockets of Hawd of Togdheer, Gagaab pastoral and Coastal *Deeh*. Compared to the long term average, the rainfall in March-May period was 80 to 300 percent higher in most of the North, except in Coastal *Deeh* and parts of Sanaag.

In most parts of central regions the rainfall was between 80 and 180 percent of normal levels. Heavy rainfall with good intensity and duration was received in Mudug (Galkayo, Galdogob) and Galgadud (Dhusamareb, Abudwak and Adado districts). By livelihood zones, the moderate precipitation was observed in most parts in Addun pastoral of Hobyo and below normal rains fell in parts of the Coastal *Deeh* and pockets of Cowpea Belt. The rainfall was average to above average in the remaining areas.

In the South, significant rainfall with good coverage and distribution was received in most of Bay, Shabelle and Gedo regions, parts of Bakool and the Juba regions, as well as most parts of Hawd pastoral of Hiran region. The areas with scattered and low intensity precipitation include the agropastoral zones of Sakow and Buale districts (Middle Juba), as well as Coastal *Deeh* of Adale district (Middle Shabelle). The *Gu* rainfall in April-May period was 120 to over 300 percent of the long term average.

Due to good rainfall performance, the vegetation conditions are also normal to above normal in most parts of Somalia for this time of the year, as estimated by the Normalized Difference Vegetation Index (NDVI) for the first dekad of June (Map 2).

Flood update

As a result of increased rainfall in Shabelle and Juba river basins in Somalia and the Ethiopian highlands, river flooding in southern parts of the country has been observed. Severe floods affected the districts of Beletweyn, Jalalaqsi and Buloburte (Hiran), Kurtunwarey (Lower Shabele), Jowhar (Middle Shabelle), Buale, Sakow and Jilib (Middle Juba). In Lower Juba region, particularly Jamame district, floods swamped large tracts of farmland. In the Northwest, heavy precipitation during the first week of March resulted in flash floods in W.Galbeed and Awdal regions. In the Northwest, a tropical storm developed in the northern Indian Ocean causing floods, mainly in Alula and Ishkushuban (Bargal town) districts in May.

SPECIAL FOCUS ON FLOODS IN GU 2010

During the current *Gu* season, excessive rains caused river flooding in the Juba and Shabelle river catchment areas as well as flash flooding in other parts of the country. The floods in southern Somalia resulted in temporary displacements and considerable damage to crops and other property. In the North, the impact of flash floods was less significant, causing temporary displacement in Alula (damaging 35 houses) and livestock deaths in Bargaal town of Iskushuban district.

Normal to above normal *Gu* 2010 rains started well and on time in most parts of the country. *Gu* rains were preceded by unseasonal rains as early as late February or early March 2010. Unseasonably heavy rains in the first week of March 2010 caused flash floods in some areas of northwestern Somalia, mainly Gabiley district in

Galbeed region and resulted in the loss of human life, livestock death, damaged water supply systems (both dams and pipelines) and collapsed embankments of the water dams. The rains intensified in the Ethiopian highlands and in the Juba and Shabelle basins in Somalia towards the end of April, and continued with high intensity until the second dekad of May. The ensuing high river levels during the last dekad of May, which resulted in large scale flooding (flash and river floods), affected almost all regions in the two river basins, including Hiran (Beletweyne, Buloburte, Jalalaqsi), Middle Shabelle (Jowhar), Lower Shabelle (Kurtunwarey), Middle Juba (Sakow, Buale and Jilib) and Lower Juba (Jammame). During this same time period, storm rains hit the Bari region causing flash floods in Alula, Ishkushuban and Qardho districts.

The impact of flash and river floods, included temporary household displacements and considerable damages to crops and other properties, especially in Juba riverine area. However, overall in the country the magnitude of the floods was much lower than the river floods that occurred in 2006, which displaced 455,000 people and completely destroyed the crops in riverine areas. The displacement caused by the flooding in this Gu season is estimated at about 11,000 households, or 66,000 people across five districts: Beletweyne, Jalalaqsi, Buloburte, Kurtunwarey and Jammame. However, the displacement was limited to within the same settlements, where people moved to higher grounds away from flooded areas. If heavy rains continue in the water catchment areas of the Shabelle and Juba rivers, including the Ethiopian highlands, more floods will inevitably occur.

The Flood Information Group¹, which was formed in October 2009 for real-time flood monitoring in response to El Niño event, has monitored the flood situation in this *Gu* season and verified the incoming flood reports from Somalia.The Group regularly updates the status of flooding and its impacts on the SWALIM flood information web-site: http://www. faoswalim.org/subsites/frrmis/index.php.The latest information on the effects of flood published by the Flood Information Group is summarized in the table above.

The continued deterioration of local, regional and national river management, flood control infrastructure, as well as the lack of central co-ordination make effective flood control impossible. Continued deposition and deterioration of river embankments, increased settlement on flood plains and dilapidated channels, will increase the numbers of people affected by progressively smaller flood crests in coming seasons. Although the trans-boundary nature of the



Flooded maize crop. Beletrahmo, Jammame, Lower Juba, May 2010

Region/ area	District	Number of urban households displaced	Number of rural households displaced	Flood Effects
	Beletweyne	6,000	2,910	Fallow land and crop fields flooded (about 2,000-2,500ha)
Hiran Riverine	Jalalaqsi	0	1,500	Fallow land and crop fields flooded (about 1,000 – 1,500 ha of maize, cowpeas, sesame and vegetables)
	Bulo-Burti	0	350	Fallow land and crop fields flooded (about 100-150ha ha of maize, sorghum, cowpeas, sesame and vegetables)
Middle Shabelle riverine	Jowhar/ Mahadey	0	0	Flooded crop fields in 19 villages (about 3,440ha of maize, cowpeas & sesame)
Lower Shabelle riverine	Kurtunwarey	0	250	Fallow land and crop fields flooded (200-300ha of maize, cowpea, sesame)
	Jilib	0	0	Range and fallow land and crop fields flooded (7,100 ha)
Middle Juba riverine	Buale	0	0	Range and fallow land and crop fields flooded (5,700ha)
	Sakow/Salagle	0	0	Range and fallow land and crop fields flooded crop fields (6,300ha)
Lower Juba Riverine	Jammame	0	100	Range and fallow land and crop fields flooded (10,000 – 15,000ha)
Bari	Alula/Bargal	0	0	Properties were destroyed and livestock deaths
bun	Qardho	0	0	Properties were destroyed
Total		6,000	5,110	34,000- 40,000ha of flooded fields

SPECIFIC VULNERABILITIES OF JUBA RIVERINE COMMUNITIES

The floods had a considerable impact on the food security situation of the Juba riverine communities (Jilib and Jammame districts in particular), who have lost most of their crops from early *Gu* planting. The situation is aggravated by the fact that majority of population doubled or tripled the cultivated areas in response to the early unusual rains received in late February to early March 2010. Costs of increased cultivation were largely covered through accelerated selling of maize stocks from *Deyr* harvest that reduced maize availability at household level. Green maize from early *Gu* planting, which was expected for household consumption in late May to early June, was largely destroyed by the floods. The adverse effects of floods are also reflected in disrupted farming activities and reduced opportunities for poor households to engage in farm labour, which they heavily rely upon as an income source during this pre-harvest hunger period.

Resilience of flood-affected population against this hazard is weak due to overstretched social support from the better-off households who also experienced the flood damage. Other constraints include social marginalisation of Bantu communities residing in the riverine areas and a limited representation of this community in Somali Diaspora. Considering the effects of the hazard and vulnerability of the poor in the Juba riverine communities, they are likely to experience severe constraints in food accessibility in the short term. However, the shock will be significantly eased by job opportunities from recessional farming over the next few months, increased fishing activities in *desheks* and off-season crop harvest in late September to mid-October 2010.

river catchments and their morphology make flood prediction and early warning difficult, it is important that flood contingency modelling be more timely, more accurate, and build upon this *Gu* 2010 season's experience.

1 The Flood Information Group is represented by FSNAU, SWALIM and FEWSNET projects

CIVIL INSECURITY

Prolonged political unrest and violence continues to affect the lives and livelihoods of the Somali people. The conflicts in Mogadishu, Central and Hiran regions have persisted over the last few months. In May, fresh confrontations between opposing factions were reported in other parts of the South as well. In the relatively stable northern regions new clashes occurred in Oodweyne district of Togdheer region in late May, while political tensions prevailed in Lasanod district of Sool region. These events often resulted in human losses, destruction of properties, human displacements and disturbed market access and trade activities.

The city of Mogadishu, and Hiran and Galgadud regions, continue to remain the key hotspot areas, where violence and confrontations occur on a regular basis. Continuous clashes in Mogadishu cause disruption in market activities and exchange, particularly affecting poor households, who mainly rely on daily income from labour and small petty trade activities for their living. Consequently, large numbers of the urban poor, along with relatively wealthier families, continue seeking refuge in more stable areas either within the city or outside of it. Tensions also prevail in parts of the South, where direct confrontations of opposing armed groups are looming large, particularly in the regions of Juba, Gedo and Bakool. Along with the political conflict clan clashes occurred in May over the ownership of a communal water source in the neighbouring areas between Baidoa and Qasahdere districts (Bay region). The clashes claimed several lives, but the issue has reportedly been resolved.

The ongoing violent clashes in Central caused displacement of urban population, disruption of trade and of humanitarian activities. Earlier this month new clashes occurred in the outer east of Beletweyne town of Hiran region forcing a significant number of people displaced by the recent floods to return to their flooded homes risking their lives. Most recently, clashes were reported between local militia and Ethiopian forces in Buuhoodle district of Togdheer region, due to a border closure by the Ethiopian forces, denying Somali commercial trucks to enter Ethiopian territory. Reportedly, an estimated 1,800 households were displaced by these clashes (OCHA Weekly Humanitarian Report, 28 May-04 June 2010).

The IASC Population Movement Tracking update (June 4, 2010) estimated that nearly 53,000 people were displaced nationwide since April 2010, of which 17,000 were displaced during April and roughly 35,900 in May 2010. In about eighty-seven percent of cases (46,000 people), the displacements were driven by the prevailing insecurity in Mogadishu, Central, Hiran and other parts of the country. Nearly 35,000 of the total displaced are from or within Mogadishu (Figure 1).

Sea piracy acts against vessels moving through the international waters continued over the last few months. However, no targeted attacks of vessels, carrying commercial and humanitarian goods to Somalia were reported, after the unprecedented attacks of this kind undertaken in March 2010 (FSNAU Quarterly Brief, April 2010). Reportedly, out of 40 attempts of vessel hijacking that occurred since January 2010, 13 have been successful (OCHA Access Paper, April 2010).

As the overall security situation in Somalia remains critical in many parts of the country, prevailing restrictions in humanitarian access are still of serious concern in much of

Figure 1: IDP Movements in Somalia April 1st - May 4th



Source: Modified from IASC PMT Update, June 4th 2010





the southern and central Somalia. According to OCHA Access report (April 2010), the total number of international UN and international NGO staff has increased in April to 205 persons (196 in February 2010). Currently, majority of the staff is located in relatively stable northern Somalia. Although the international staff presence in the South and Central has also shown a gradual increase since February, the number of staff is considerably lower than one year ago (Figure 2).

AGRICULTURE

Crop Conditions and Activities

The current Gu season is distinguished with increased planting attributable to multiple factors such as the early start of the rains; high cereal prices; increased engagement in farming by the displaced population; and reduced supply of food aid in the area. Favourable rains received in most parts of the South contributed to good crop performances enabling crops to germinate and establish normally. Currently, the established crops are at different stages (from 1st weeding to milking stage) because of different planting times. Green maize is expected to be ready in late May or early June, with the main maize harvest occurring largely in July. The continuation of rains into June will be critical for the growth of crops at the milking stage. However, currently overall Gu 2010 crop production prospects look favourable.

In some areas of Bay and Gedo regions, crop germination and establishment was undermined by an outbreak of crickets and grasshoppers respectively, due to favourable ambient temperature and humidity during the onset of Gu rains. In addition, a few incidences of pest (white grubs, termites and stalk-borers) attacks on crop seedlings were also reported in most cropproducing regions (Shabelle regions, Juba regions, Gedo, Bay, Northwest and the Cowpea Belt of Central). However, initial field reports indicate that sorghum production is expected to be average to above average in sorghum growing districts of Bay, Bakool, Gedo, Shabelle and Juba regions. Similarly, maize production is likely to be average in the main maize producing regions of Lower and Middle Shabelle, as well as in Gedo region. Conversely, Gu ceral production is expected to be below normal in Juba and Hiran due to significant crop damage caused by the floods in early May as well as below normal rainfall in agropastoral and riverine livelihoods of Hiran. The crops that were damaged by the floods in southern Somalia were at different growth stages - from milking to second weeding. Although the impact of the floods has not yet been fully assessed, the rough estimates of the scope of the damage are as follows: 15,000 - 20,000ha in Middle Juba, 10,000-15,000ha in Lower Juba (Jammame), 3,000-4,000ha in Hiran, 3,000-4,000ha in Middle Shabelle and 200-300ha in Lower Shabelle. In the medium term, the effects of damage brought about by flooding in Shabelle and Juba Valleys will be



Good maize crop at flowering stage. Kurtunwaarey, Lower Shabelle, May 2010



Flooded maize crop at flowering stage. Birbiriso, Sakow, Middle Juba, May 2010



Flooded maize crop at flowering stage. Fagaan, Jammame, Lower Juba. May 2010

cushioned by increased opportunities for recessional cultivation (off-season crops) in *desheks* over the next few months as well as increased fishing opportunities. However, in the short term, households in the flood-affected communities of Juba region are at risk of crisis. Reportedly, flood water has already receded in many areas, while *Hagaa* rains have started in Shabelle, coastal Juba and parts of Bay, improving standing crops in these regions.

Crop establishment and growth in agropastoral areas of Awdal, Togdheer and Galbeed regions in the Northwest is good due to the above normal *Gu* rains. Maize crops planted in March/April are currently at flowering and milking stage. Similar to southern regions, green maize is expected to be ready in early June and the main maize harvest will occur in July. In response to the good rains, farmers also planted sorghum, which is used in the area for both food and fodder. The sorghum harvest is expected in October/November 2010.

Local Cereal Prices and Terms of Trade

The local cereal prices (sorghum and maize) exhibited mixed trends since December last year. The prices of sorghum increased in the range of 15- 40% in most agropastoral markets of southern Somalia, with the exception of Bay region, where it has declined by 31% due to the bumper harvest last *Deyr* season (Figure 3). Similarly, maize prices have risen by 15-68% in most markets of southern Somalia with Buale (68%) and Afmadow (65%) showing the highest rate of increase (Figure 4). Compared to May last year, the increase in local cereal price are recorded in Central (sorghum - 40%), the Shabelle valley (maize - 35%) and Sorghum Belt (sorghum - 17%). These cereal price increases are in line with expected seasonal trends.

However, the observed price increments can partly be attributed to such factors as low supply due to below average *Deyr* 2009/10 production in some regions (Shabelle, Hiran, Gedo), food aid suspension in the South and disruptions in market supply caused by insecurity in South and Central. Conversely, the local cereal prices have slightly dropped or remained stable in most main markets of northern Somalia.

The lowest maize prices in May 2010 were recorded in Lower Juba (Jammame - 5,973 SoSh/kg; Kismayo 7,000SoSh/kg) and Lower Shabelle (Qoryole 7,344 SoSh/ kg). Conversely, the highest maize prices were noted in Afmadow and Hagar (14,000SoSh/kg) in Lower Juba due to the remoteness of these districts from the main producing areas and restricted trade movements caused by Gu rains as well as insecurity. The lowest sorghum price (4,475 SoSh/ kg) in May was observed in Baidoa market due to significant supply from last harvest and intensified stock selling in this Gu season to cover the costs of land preparation and other farming activities. Gedo (Luuq - 10,000SoSh/ kg; Bardera - 7,500SoSh/kg) as well as Bakool (Hudur - 7,500SoSh/kg) and Hiran (Beletweyne - 7,000SoSh/ kg) regions exhibited the highest sorghum prices among the markets of the Sorghum Belt due to the several poor consecutive seasons of cereal production and likely the suspension of food aid distribution. However, compared to other regions of Somalia the highest price of sorghum was recorded in the North (Erigavo - 20,400 SoSh/kg; Lasanod - 20,250 SoSh/kg; Bossaso - 17,000SoSh/kg) and Central (Dhusamareb - 17,000SoSh/kg), due to transportation costs and volatile security situation affecting trade movements. The observed sorghum prices in the above mentioned markets of the North are very close to those of rice, which is traditionally consumed in these areas.

Improved labour opportunities, in view of the intense agricultural activities in the current Gu season as well as cash for work activities in Lower Shabelle implemented in the first half of 2010 (rehabilitation of canals in Qoryoley and Kurtunwarey in Lower Shabelle), contributed to increased





Figure 4: Trends in Maize Prices, Shabelle & Juba Regions



Figure 5: Trends in Regional Terms of Trade (Local Cereal to Labour Wage)



labour wage rates in Shabelle and parts of Sorghum Belt regions. As a result, in most reference markets of Lower Shabelle, terms of trade (ToT) between maize and daily labour wage increased by 20-30% since December last year due to a significant increase (from 50,000SoSh/daily in Dec. '09 to 90,000SoSh/daily in May '10) in labour wage rate in the same period. The ToT between cereal and daily labour has also increased in Baidoa (44%) and Beletweyne (31%) in the last six months, but it has dropped in other markets of Shabelle (Merka - 50% and Jowhar - 14%) and Sorghum Belt (Bardera - 36%), mainly due to cereal price increases. The ToT decline (18-46%) was also observed in most main markets of Juba regions as a result of increased cereal prices and low wage rates caused by reduced farming labour opportunities in the riverine flood affected areas (Figure 5).

In absolute terms, the highest ToT in Shabelle regions is observed in Wanla Weyne (22kg of maize/ daily labour wage) and Qoryoley (12kg of maize/ daily labour wage) districts, while Jowhar (6kg/daily labour wage) exhibited the lowest ToT in the region, due to a significant maize price increase (41%) in the last six months. In Juba regions, the highest ToT is documented in Kismayo (20kg of maize/ daily labour wage) and Jammame (18kg of maize/ daily labour wage) and the lowest is recorded in Hagar and Afmadow (5-6kg of maize/ daily labour wage). In the Sorghum Belt, the highest ToT is noted in Baidoa and Beletweyne (15kg of sorghum/daily labour wage each), while the lowest was in Hudur market (5kg of sorghum/daily labour wage) due to the high sorghum prices and low daily labour wage rates. By zonal aggregates of the ToT between local cereals and labour wages, the lowest ToT in May 2010 was found in the Northeast (7 kg of sorghum/ daily labour wage).

LIVESTOCK

Pasture and Water Conditions

Most of the recent rain deficit areas of northern Somalia, with the exception of pockets of Guban, Gabi valley, Coastal *Deeh* of Iskushuban and Dharoor/Karkaar valley of Bari region, have generally received normal to above normal rains of high intensity. The rains alleviated cumulative water stress, particularly in drought stricken areas of Sanaag that suffered from water shortages for the past four seasons. Boreholes were shut off and water trucking has ceased completely as communal dams, natural ponds, private water catchments and *berkads* have fully replenished, while water levels increased in boreholes, shallow wells, streams and dry rivers. As pasture, browse and water conditions were significantly poor in the past 3 to 4 seasons, unusual rains during past *Jilaal* followed by normal to above normal *Gu* rains, helped in rapid regeneration of fodder and pasture and significantly improved both the ground surface and sub-surface water levels. However, pockets of livelihood zones of Guban, Gebi valley of Sanaag, Coastal *Deeh* of Iskushuban and Dharoor/Karkaar valley of Bari region remain dry with localized showers not replenishing the main water sources and improve pasture conditions.

In the central regions (Mudug and Galgadud) and Hiran, key pastoral areas of Hawd, Addun and Southern Inland Pastoral livelihoods, as well as most of the central Cowpea Belt Agropastoral, have finally came out of the prolonged drought that has continued since *Deyr* 2007/08. Normal to above normal *Gu* rainfall, which was preceded by unseasonal localized normal rains during *Jilaal* period, have fully recovered pasture and replenished water (*berkads*, communal dams and natural ponds) sources. Water trucking has stopped in the Hawd and most parts of the Addun livelihood and water prices have plummeted in most pastoral areas of central regions and Hiran, as free rain water has become available in most basins, *berkads*, ponds and communal dams. However, Coastal *Deeh* and pockets of Cowpea Belt of Central and Hiran Agropastoral received limited rainfall, which resulted in further deterioration of both pasture and water conditions.

In southern Somalia, *Gu* rains were normal to above normal in terms of coverage and intensity, however, pockets of Tieglow and the Coastal *Deeh* of Shabelle and Juba regions, received localized poor rains, resulting in limited pasture and water availability. In most parts of the South, however, rains have fully replenished water sources and improved rangeland conditions.

Livestock Migration

Due to normal to above normal rainfall in most parts of Somalia, normal livestock migration has resumed throughout the country for the first time since *Deyr* 2006/07. Most of the out-migrated livestock of central and northern regions, have returned to their areas of origin that received normal *Gu* rains. Namely, pastoralists from Sool Plateau of Sanaag region who migrated to Bari and Sool regions 3-4 seasons ago, have returned to their settlements exploiting the remarkably improved pasture and water resources. Similarly, Hawd and Addun pastoralists of Central have returned from out-migration in Somali region of Ethiopia that occurred in *Gu* 2008. The livestock in localized rain deficit areas of Coastal *Deeh* and Dharoor/Karkaar valley of Iskushuban district and Guban livelihood zone of Sanaag have migrated to the neighboring livelihood zone of Sool Plateau of Bari and Sanaag regions, to benefit from improved pasture resources of these regions.

Livestock Body Conditions and Production

Sheep and goats in the areas of Central (Mudug, Galgaduud and Hiran regions) and the North (Sanag, Sool, Togdheer and upper Bari), have begun to recover from the effects of the recurrent droughts and successive poor seasonal rainfalls and are in good to average body conditions. However, camel body conditions are still recovering. In Awdal, W. Galbeed, Bari and Nugal regions, livestock body conditions have also improved significantly as a result of two successive seasons of normal to above normal rains, coupled with unseasonal rains during *Jilaal* period. The recovery of small ruminants in the regions of Central and Hiran resulted in high conception rates and a slight increase in milk production. Return of the out-migrated camel (since *Gu* 2008) to central regions, have also contributed to slightly improved milk availability on the markets. Significant lambing and kidding rates have been observed in the northern and central regions and are expected to increase in June and July, which will lead to improved goat milk accessibility both for household consumption as well as for sale. However, milk production is low for the camel that remained in central regions during drought years, due to low calving in *Deyr* 2009/10 and increased conception in *Gu* 2010.

Livestock body conditions have improved in the South, due to significant increase in pasture and water availability as a result of the compound effect of unseasonal rains in March and above normal rainfall in April and May. However, cattle in rain deficit areas of Tieglow (Bakool) are weak and have yet to recover from the poor *Deyr* 2009/10 and the consequent harsh *Jilaal* dry season. Overall, in southern Somalia cattle and camel conception rates are medium and milk production has significantly improved. Calving rates are fairly low for the camel as they have moderately calved during *Deyr* 2009/10, while a high cattle calving is expected in the coming *Hagaa* season. However, market supply of milk is poor, as pastoralists have not returned to areas close to main towns, where they typically sell their milk.

Livestock Trade, Prices and Terms of Trade

Overall livestock exports have significantly increased since December 2009, but are still lower compared to the peak export season during Ramadan (July/August) and Hajj (November). In May 2010, livestock exports from Bossaso Port (59,662 head) were 30% higher than in December 2009, but 32% lower compared to May last year. Total livestock

exports from Berbera port (60,620 head) were 10 times higher than in December 2009 (5,983 head) and 57% higher than in May 2009 (38,625 head). The increased exports of live animal is attributed to improved pasture and water throughout the country, resulting in the increased number of export quality livestock, as well as improved access to export markets following the livestock export ban lifting by Saudi Arabia last October 2009. As a result, carcass meat exports have completely ceased as the demand for live animals increased.

Livestock prices in May 2010 are at record high levels for the last five years in most markets of the country (Figure 6). Currently, local goat prices in the Sorghum Belt, Shabelle and Juba regions are 26%, 2% and 12% higher, compared to December 2009, respectively. In the regions of Northwest and Central, the respective goat prices were 64% and 5% higher for the same period of comparison, owing to improved livestock body conditions in this *Gu* season. In the Northeast, local goat price has slightly declined (2%) since December 2009, due to high market supply by pastoralists in-migrated to the area during *Deyr* 2009/10, and currently selling their animals to payoff the debts incurred during past *Jilaal* season.

In the last six months, the average terms of trade between goat and cereals have improved in Sorghum Belt (21%), Northwest (48%) and Central (5%). However, the ToT has declined in Shabelle (28%), Juba (19%) and Northeast (12%) in the same period due to significant increase in cereal prices in these regions. Compared to the 5-year average (June 2005 – May 2010) the ToT was lower in the last month in Central (rice), Juba (maize) and Sorghum Belt (sorghum), while it maintained the same level in Shabelle and increased in northern regions (Figures 7 and 8). When comparing the ToT between local goat and local cereals (maize and sorghum), the highest ToT was recorded in Baidoa market (167 kg sorghum/head) of Bay region - the major sorghum producing region in Somalia.

By zones, the ToT was highest (129kg maize/head) in Shabelle valley, while the Northeast exhibited the lowest ToT (68kg sorghum/head), due to extra costs incurred by transportation of sorghum from producing regions of southern Somalia.

MARKET AND TRADE

Exchange Trends

Since December 2009, the SoSh has remained relatively stable or slightly depreciated in most markets of the Central, Northeast and South. For instance, in Mogadishu's main Bakaara market, one US dollar (USD) was exchanged for SoSh 31,800 in May 2010, indicating marginal depreciation (down from 31,550SoSh/USD) since December 2009. Similar trends were replicated in other markets of SoSh areas with observed depreciation of 1-5% over the same period. However, compared to the base period of March 2007, the value of SoSh is still only about half its previous value. The SISh has also depreciated between December 2009 and May 2010, by about 5 percent (from SISh 6,400 to SISh 6,700 against USD). However, the currency has gained about 4% in value since May last year. The exchange rate in Somaliland is relatively stable compared to other parts of the country, showing only 7% depreciation from the reference year (March 2007).

Import Commodity Prices

Prices of imported commodities (petrol, diesel, rice, wheat flour, sugar, vegetable oil) have shown mixed trends since December 2009 with marginal decline for the imported food prices (1-12%) and increase for petrol (1-4%). Compared to May 2009, petrol prices are 1-7% higher, rice and vegetable oil declined by 1-9%, while sugar and diesel exhibited significant increases in prices, in the range of 23-65% and 3-43% respectively. The highest increase in diesel price

Figure 6: Regional Trends in Local Quality Goat Prices



Figure 7: Trends in Terms of Trade, Cereal to Goat, South



Figure 8: Trends in Terms of Trade, Cereal to Goat, North and Central



was observed in Mogadishu (43 percent) while for sugar, the biggest price change was noted in Bossaso market (increase of 65%). The main contributing factors for increased sugar and diesel prices include, reduced imports, greater inland transportation costs as well as global crude oil price rise since April 2009 (Figures 9 and 10). In the last month Central and Juba Valley demonstrated the highest sugar and diesel prices equivalent to SoSh 29,170 and SoSh 33,800 respectively. Compared to the pre inflation levels (March 2007), the prices of all commodities from the month of May 2010 were 103 - 230% higher in SoSl areas and 7-70% higher in the SISh areas.

Cost of Living for Urban Poor

Since the beginning of the year, the Consumer Price Index (CPI) or the cost of the Minimum Expenditure Basket (MEB) has shown relatively stable trends in Somali shilling zones but declined by 5% in Somaliland. Specifically, the CPI increased slightly in Central (3%) and South (7%) respectively but declined in North SoSh zone (9%) over the same period. However, over the last two months (since March 2010), the CPI has declined in Central by 8% and further in the northern SoSh areas by 12% while remaining stable in the South and SISh areas (Figure 11). Compared to the reference base period (March 2007) current CPI levels are 93 - 147% higher in all Somali Shilling areas and 17% higher in Somaliland

Figure 9:Central, Trends in Imported Commodity Prices compared to Exchange Rate



Figure 10: Juba Valley, Trends in Imported Commodity Prices compared to Exchange Rate



Shilling areas. In May 2010, the highest cost of MEB in SoSh areas (3,637,283 SoSh) was recorded in the North, while the lowest (1,907,780SoSh) was in the South. The MEB cost was equivalent to 879,303 SISh in the North SISh areas.

The CPI changes over the last two months are attributable to mixed price trends of the main food commodities included in the MEB. In Central the CPI was pulled down by a significant decline of milk price (34%) and modest decreases in the prices of sugar (3%) and vegetable oil (1%) that have offset the concurrent marginal increase in cereal prices (2-3%). The slowing inflationary impact in the Northeast helped reduce the prices of milk (21%), sugar (16%), sorghum (13%), vegetable oil (8%) and wheat flour (3%). The steady CPI in the Northwest is due to offsetting sorghum price dynamics in different markets, while in the South this is attributable to relative stability of the sorghum price and decline in the prices of sugar (10%) and milk (6%) that have balanced out the marginal price increases for wheat flour (6%) and vegetable oil (2%).





NUTRITION SITUATION

Hawd and Addun Nutrition Assessments

In May 2010, FSNAU in collaboration with UNICEF, WFP, Merlin, SRCS and the Ministry of Health of Puntland, conducted two livelihood based nutrition assessments in Central/Northeast regions. The purpose was to review the nutrition situation six months after the November 2009 *Deyr* assessments, which had indicated a *Critical* situation, and provide partners with updated information to guide response. A total of 647 children¹ were assessed in the Hawd and 666 in the Addun livelihood zones.

Preliminary findings for the Hawd assessment indicate a global acute malnutrition (GAM) rate of 15.3% (12.3 - 18.9) and a severe acute malnutrition (SAM) rate of 3.9% (2.2 - 6.8). Statistical analysis of the findings based on the CDC probability calculator indicates a significant improvement in the global acutely malnourished rate (Pr=93.6%) compared to those for the November 2009 assessments when the GAM rate was 19.1% (15.3-23.0), the change however is insignificant in the SAM (Pr=61.6%) compared to 4.3% (2.7 – 5.9) six months earlier. The general improvement in nutrition situation is associated with increased access to milk and milk products following pasture and water availability with the favorable Gu 2010 rains (see Livestock Sector) and humanitarian intervention. Nevertheless, the crude mortality rate (CMR) is 1.07 (0.64 - 1.79), above ther *alert* threshold indicates deterioration since November 2009. The 32 reported deaths were attributed to diarrhea (9 cases mainly from Abudwaq), acute respiratory infections (6), malaria (3 from Baadweyne and Harfo), anemia (3) and birth complications (2).



Weight measurement, FSNAU Hawd Livelihood zone, May 2010

For the Addun livelihood zone, preliminary findings indicate GAM rate of **22.8%** (**19.2** – **27.0**) and SAM rate of **7.1%** (**4.7** – **10.5**) indicating a *Very Critical* nutrition situation. Statistical analysis based on the CDC probability calculator indicates insignificant deterioration in the global acutely malnourished rate (Pr=62.7%) since the November 2009 assessments when the GAM rate was 20.2% (15.6 - 24.7). However there is significant deterioration in the SAM (Pr=93.2%) compared to 4.6% (2.8 - 6.3) previously. Whereas the *Gu* 2010 rains have also been favorable in the Addun livelihood zone, the area is faced with conflict, and recently has seen a lot of displacement in addition to limited road transport of food from Bossaso sea port, and therefore affected availability and access. The CMR is **0.52** (0.30-0.89) and within alert levels. The 17 reported deaths were mainly attributed to birth related complications (6), accidents/ conflict related killings (5) and diarrhea (2) evenly distributed across the clusters. Statistical analysis using the CDC probability calculator also shows a more concerning nutrition situation in the Addun compared to the Hawd, both for the GAM (Pr=99.8%), and SAM (Pr=92.6%). Detailed analysis of the findings, together with the underlying factors is on-going and will be shared in the May-June 2010 Nutrition Update due early July.

Nutrition Assessments Plan for June – July 2010

FSNAU and partners are conducting nutrition assessments in IDP and urban settlements of Hargeisa, Burao, Berbera, Bossaso, Garowe and Galkayo currently. Findings will be shared in the May-June Nutrition Update. Additional nutrition surveys are scheduled for Hiran, Shabelle (including Afgoye), Juba, Gedo, Bay and Bakool regions in June-July 2010, and across all the other livelihood zones in the north from mid July 2010. Efforts to conduct the planned nutrition surveys in Hiran have been ongoing for 1 month, but due to insecurity they have not yet commence but we hope that the situation may change so we can proceed and conduct as planned. Training on-going for Afgoye IDP survey is on-going.

Knowledge, Attitudes and Practices (KAP) Study on Offal consumption in Boroma, Burao and Bossaso

UNFAO/FSNAU has completed collecting data on knowledge, attitudes and practices on offal consumption in Boroma, Burao and Bossaso as part of a KAP study, and data entry is on-going. The KAP study, covered under the *UNFAO's Rapid Response Rehabilitation of Rural Livelihoods Project*^{2[1]} through World Bank funding, is part of a wider initiative to increase access of vulnerable groups, especially children and women of child bearing age, to nutritious food. It is anticipated that the findings from the study will provide baseline upon which to assess progress, and also guide project implementers, mainly UNFAO and UNICEF, to design an appropriate nutrition education package for the targeted communities. Preliminary findings will be shared in the May-June Nutrition Update.

^{1 325} boys and 322 girls in the Hawd; and 345 boys and 321 girls in the Addun livelihood zones.

^{2&}lt;sup>[1]</sup> Sub-component 2.2: Improving slaughter houses with value addition services

SOMALIA LIVELIHOOD ZONES



Recent and forthcoming publications and releases

FSNAU/FEWSNET Market Data Update, May 2010 FSNAU/FEWSNET Climate Data Update, May 2010 FSNAU Technical Series Report, Galkayo Urban Baseline Analysis Report, June 2010 (forthcoming) FSNAU Bi-Monthly Nutrition Update, March-April 2010 FSNAU Micronutrients Study Report, May, 2010





Funding Agencies