

Climate

Civil
Insecurity

Agriculture

Livestock

Markets

Nutrition

Emerging
Regional
Issues

FSAU - Somalia
Kalon Towers,
Parklands
Box 1230 Village
Market
Nairobi, Kenya

Tel: +254 20 374 5734
Fax: +254 20 374 0598
email:
fsauinfo@fsau.or.ke
www.fsau-somali.org

KEY

FINDINGS

SPECIAL ALERT: Displaced populations outside and inside of Mogadishu face Humanitarian Emergency conditions. The FSAU Somalia Integrated Food Security and Phase Classification (IPC) map is updated to include newly displaced populations in **Humanitarian Emergency** (*see Map 2, Table 1*). Urgent humanitarian assistance is needed for the most vulnerable populations, including shelter, water, access to safe sanitation, medical services, food, and measures to prevent the further spread of ongoing outbreak of Acute Water Diarrhoea (AWD). The critical needs of the poorest displaced populations require immediate response. Humanitarian access is currently constrained and improvements are urgently needed to ensure that humanitarian assistance reaches the populations with the most critical needs (*see page 2*).

Fighting in Mogadishu during March and April has resulted in the displacement of up to 365,000 people or roughly one third of the city's population of almost one million people as people have fled the city in search of safety. In addition, another 30-40% of the population of Mogadishu is estimated to be displaced within Mogadishu itself, as people search for areas of safety within the city. In total up to 70-80% of the total population of Mogadishu is currently displaced. Most of the population who have fled Mogadishu are concentrated in Shabelle region (39%) and central region (51%) with the remaining 10% displaced in other regions. In some areas the concentration of displaced population is so great that the displaced population are half or even more than the resident host population (*see page 2*).

The sheer magnitude and concentration of newly displaced people in such a short period of time is leading to a humanitarian crisis in which basic amenities of shelter, clean water, safe sanitation, health care, medicines and food are severely constrained or insufficient to meet the needs of the displaced populations and host communities. In areas of concentrated and high population displacement the prices for rental properties, transportation, water, and basic food and non-food items have increased sharply, between 30-70% in the last four weeks. These sharp price increases are compounding problems related to the loss of livelihoods and income. In addition to this already critical situation there is an ongoing and increasing outbreak of Acute Watery Diarrhoea (AWD), which is most severe in the same areas where there are large concentrations of displaced populations (*see page 2*).

Civil Insecurity: Insecurity and conflict in Mogadishu has intensified since the end of February leading to the loss of lives, injuries, and significant population displacement within and from the capital. Insecurity in Mogadishu and surrounding areas, as well as road blocks, port closures, and marine piracy are creating difficulties in humanitarian access, the importation of food and non-food commodities and inter-regional trade flows in southern Somalia (*see page 2*).

Climate: There is a timely and widely distributed start to the Gu seasons rains (April-June) throughout most of the country, indicating that the seasonal rains may be normal. In March, light showers, locally known as Todob or Jar fains, fell over many parts of southern Somalia including the Juba valley, Gedo, Bay, Bakool and Hiran. In the northwest good rains were received in parts of Awdal, Togdheer and the Hawd of Hargeisa and also in the Ethiopia highland catchment areas of the Juba and Shabelle rivers (*see page 6*).

Markets: A slow down of activities in the main Mogadishu port due to increasing levels of insecurity, renewed marine piracy and the imposition of new port tariffs is having an impact on the supply and price of imported food and non-food commodities to and within the Mogadishu market catchment area. Insecurity has disrupted market activities, informal trade and the casual labour market in Mogadishu. The depreciation of the Somali Shilling against the dollar noted between January and February continues with further depreciation in south, central and northeast Somalia during March (*see page 6*).

Agriculture: Findings from the FSAU and partners off-season crop assessment, conducted between 17th March and 7th April 07, estimate that total off-season cereal production was 11,000mt of maize or 52% of the projected 21,000mt. Sesame production is also well below the projection (at 29%) at an estimated 5,103mt. These reductions are attributed to flood waters that remained longer than expected, the impact of insect damage, and the low utilisation of farm inputs. Maize prices are continuing to increase due to the overall poor harvest in last *Deyr* season (Nov.-Dec.), but are still lower than their peak levels in the last three years. Sorghum prices continue to decline, sorghum is widely available, and terms of trade is good in most markets throughout the south and central regions (*see page 7*).

Livestock: As the result of an extremely mild dry season (January-March) in which rangeland conditions were above normal, livestock body conditions for all species (cattle, sheep, goat, and camel) are good throughout the country. Rains in March and April are further replenishing water and pasture in most areas and livestock migration is minimal. In general, incidence reports of the unknown camel disease and symptoms of RVF continue to decline. Livestock export markets in the north began to reopen in March and the total number of sheep and goats exported increased significantly up to 376,400 heads. Although average terms of trade (cereal to goat) decreased between February and March in the Juba region due largely to maize price increases, terms of trade is still above long term average for the season. In the Sorghum Belt, terms of trade (cereal to goat) increased over the same period, as the price of sorghum decreased and goat prices increased (*see page 8*).

Nutrition: The nutrition situation in parts of South and Central Somalia remains consistently critical in spite of the improved food and livelihood security status. The contribution of illness, including the persistent Acute Watery Diarrhoea (AWD) outbreak, poor access to health services, sub-optimal care practice and the recent conflict affected displacement is likely to be significant (*see page 9*).

SECTOR HIGHLIGHTS

CIVIL INSECURITY

Despite two ceasefires, the insecurity in Mogadishu has intensified since the end of February. Conflict has led to the loss of lives and injuries in Mogadishu but also considerable displacement within and from the capital. Displacement from Mogadishu has increased substantially in the past month. Insecurity in Mogadishu and surrounding areas during March compounded the difficulties of humanitarian access and the provision of humanitarian assistance noted in previous reports (FSAU Technical Series Report No.V., 12; FSAU Quarterly Brief, March 16, 2007). This included increasing roadblocks and the closure of the Kenya Somalia border. The combination of fighting in Mogadishu and another case of marine piracy is limiting the availability of suitable vessels for bringing humanitarian assistance (including food aid) into the country and having impacts on the importation of food and non-food commodities and inter-regional trade flows (see Market section). Increasing tension in Dhahar in Sanaag region in early April is also causing concern as humanitarian access in this area is already problematic.

MOST VULNERABLE OF THE NEWLY DISPLACED POPULATIONS FROM MOGADISHU FACE HUMANITARIAN EMERGENCY CONDITIONS

Fighting in Mogadishu during March and April has resulted in significant population displacement as people are fleeing the area in search of safety. As of April 27, the UNHCR Population Tracking System roughly estimated that 365,000 people or 40% of the total population of Mogadishu have been displaced to locations outside of the city. However initial indications are that a small number of people have begun to return to Mogadishu. In addition to the displacement out of Mogadishu, it is also estimated that another 30-40% of the Mogadishu population is displaced within Mogadishu itself. (Map 1)

Although FSAU does not generally classify urban populations within the FSAU Integrated Food Security and Humanitarian Phase Classification (IPC), the situation is so extreme in terms of the conditions faced by the fleeing populations that FSAU is compelled to highlight the severity of the plight of these displaced populations and their humanitarian needs. After a thorough review of all existing information, four key reference outcomes in the Integrated Food Security and Humanitarian Phase Classification (IPC) are currently applicable to at least the poor and most vulnerable of the displaced populations (if not more) and unequivocally place this group within the phase of **Humanitarian Emergency (Map 2)**. The applicable IPC key reference outcomes include high intensity conflict, concentrated and increasing population displacement with severely constrained access to shelter, clean water, safe sanitation and health care, constrained food access due to loss of livelihoods and rapidly increasing prices and an increasing incidence and outbreak of Acute Watery Diarrhoea (AWD).

Concentrated and Increasing Population Displacement

It is extremely difficult to estimate displacement numbers and their locations due to the ongoing and rapidly evolving situation; however, the UNHCR estimates do provide general indicative levels and trends. In addition to the population displacement out of Mogadishu, several thousands of people who are unable to move outside of Mogadishu are displaced **within** Mogadishu itself, roughly estimated to be 30-40% of the Mogadishu population. This means that between 70-80% of the total population of Mogadishu of almost one million people have been displaced in the last few weeks.

Despite the fluidity of the situation and the availability of only rough displacement estimates, the UNHCR numbers are clearly indicative of a serious and significant crisis in terms of population displacement. Most of this newly displaced population or 39% of the total new displacement from Mogadishu are concentrated in towns within the Shabelle region, while 51% have fled to central region, and the rest are reported to be in Bay, Gedo, Juba, and other northern locations (Table 1). The situation of the newly displaced population and the burden on the host communities is significant and dramatic when considering that in many towns the displaced population is greater than the host population. For example, using estimates of new displacement provided by the UNHCR Population Movement Tracking system (April 27, 2007) set against UNDP Somalia (2005) population estimates, the newly displaced population in Dhusamarreb district, roughly estimated at 42,600, is roughly 253% of the urban population and 47% of the total district population (Table 1). Likewise, two other districts also indicate exceedingly high newly displaced populations relative to resident host population levels, specifically Afgooye district in Shabelle and Cadaado district in Galgaduud region. In Afgooye district there are an estimated 42,927 new IDPs representing 198% of the urban population of 21,602 and 32% of the total

Map 1: Somalia: New Displacement in March '07

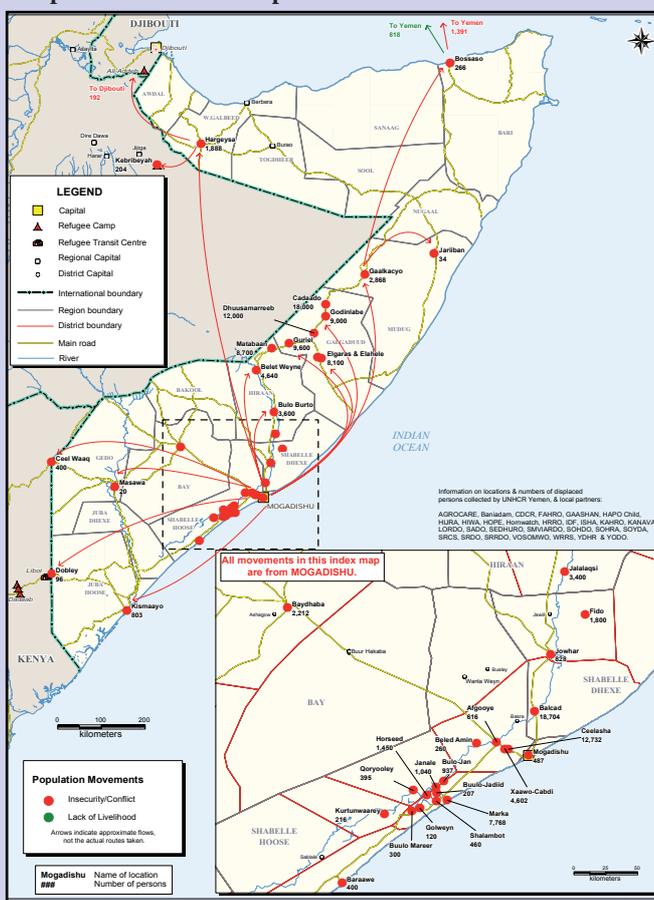


Table 1: Displacement, AWD and Prices

Region	District (* Regional capital)	Displaced Populations			AWD Case Fertility Rate(%)	Increase in Prices from Mid March to 1st week of April		
		Feb 1- April 27	% of Total Pop.	% of Urban Pop.		Rice,Wheat & Sugar	Maize	R.Sorghum
Mudug	Gaalkacyo *	9,566	6.9	17.5		6 to 14%*	no change*	no change*
	Galdogob	18	0.0	0.3				
	Hoby	13,280	19.7	103.7				
	Jariiban	34	0.1	0.5				
	Xarardheere	16,818	25.7	125.6		0 to 10%*	no change*	no change*
Galgaduud	Dhuusamarreeb *	42,600	46.7	253.3	3.42	13 to 25%	no change*	no change*
	Cabudwaaq	6,600	16.1	78.5		17% decrease to no change	no change*	no change*
	Cadaado	22,635	49.6	242.7				
	Ceel Buur	23,292	29.4	181.7				
	Ceel Dheer	13,842	19.0	119.3		no change*	no change*	no change*
Hiraan	Belet Weyne *	15,890	11.0	51.5	3.62	11 to 43%	8% decrease	NA
	Bulo Burto	4,461	5.0	25.0	7.32			
	Jalalaqsi	7,327	15.7	71.3	0.75			
Shabelle Dhexe	Jowhar *	15,520	7.1	42.1	1.69	25 to 38%	3 increase	11% decrease
	Adan Yabaal	2,400	3.8	33.3		0 to 10%*	NA*	no change*
	Balcad	43,492	36.1	154.7				
	Cadale	1,800	3.9	16.7				
Banadir	Mogadishu **	487	0.1	0.1	1.53	50 to 67%	no change	no change
Shabelle Hoose	Marka *	21,998	11.4	34.4	4.89	25 to 38%	13% increase	20 % increase
	Afgooye	42,927	31.8	198.7	5.32	13 to 38%	14% increase	14% increase
	Baraawe	15,900	27.6	103.2	2.62			
	Kurtunwarey	372	0.7	5.0	3.51			
	Qoryooley	2,516	1.9	11.0	10.78	6% decrease to 23% increase	25%increase*	no change*
	Wanla Weyn	388	0.2	1.8	10.00			
Bay	Baydhaba *	16,918	7.4	28.6		38 to 43 %	67% increase	no change
	Buur Hakaba	4,560	3.6	18.2				
	Diinsoor	2,100	2.8	17.3				
	Qansax Dheere	2,400	2.4	14.3		0 to 14%*	44% increase*	no change*
Bakool	Xudur *	500	0.5	2.6				
	Ceel Barde	300	1.0	5.6				
	Tayeeqlo	400	0.5	2.5				
	Waajid	600	0.9	4.2	5.00			
Gedo	Baardheere	744	0.7	2.9	8.04	0 to 11% *	17%decrease*	40% decrease*
	Belet Xaawo	940	1.7	6.9		no change*	25% decrease*	no change*
	Luuq	130	0.2	0.9		no change*	no change*	no change*
Juba Dhexe	Jilib	350	0.3	1.2				
Juba Hoose	Kismaayo *	3,485	2.1	3.9	5.49	25% to 50%	no change	no change
	Afmadow	2,012	3.9	28.3		0 to 14%*	no change*	NA
	Other Districts	5,531						
		365,133	4.9	12.6				

Source: 2005 Population data - UNDP Somalia, Displaced Populations - UNHCR 27 April 2009, AWD cases,Deaths & CFR - WHO 1 Jan - 31 Mar 2007, Market Prices - FSAU
 ** Numbers do not include new displacement within Mogadishu

district population of 135,012. Similarly, the newly displaced population in Cadaado district in Galgdud, roughly estimated at 22,635, represents 242% of the urban population and 50% of the total district population and in Balcad in Middle Shabelle the displaced population represents 154% of the urban population and 36% of the total district population. Although significantly lower but still substantial, newly displaced populations in Ceel Buur district in Galgaduud and Belet Weyne district in Hiran, are 181% and 52% of host resident populations (Table 1). Other districts indicating high concentrations of newly displaced populations relative to host resident populations ranging between 20 – 75% include Bulo Burto and Jalaqsi districts in Hiran region, Jowhar and Marka districts in Shabelle region, and Baidoa district in Bay region.

Severely constrained shelter, clean water, safe sanitation and health care

The presence of newly displaced populations, especially in locations where the concentration is high relative to resident populations, is placing increased pressure on host communities, placing additional burden on water and health infrastructure, increasing the demand for rental properties leading to a three to fourfold increase in rents (for example, Qoryooley and Kurtunawarey), and increasing competition for available employment opportunities. For people trying to leave Mogadishu, and for those that can afford to leave, transportation costs have increased substantially. Public transport between Mogadishu and Jowhar is currently 90,000 to 100,000 SoSh per person, whereas before the fighting the rate was 60,000 SoSh per person. Fighting and an increase in roadblocks is also contributing to restrictions in trade flows and to an increase in the costs of transporting food commodities. During periods of active fighting traders have been reluctant to move goods out of the city and take advantage of the ceasefires to reactivate trade flows (see Market section). The cost of transporting a 50kg sack of sugar or rice from Mogadishu to Jowhar in the first week of April was 18,000 to 20,000 SoSh, as compared to 14,000 to 15,000 SoSh/sack. With the increasing water demands, water prices in urban areas have also risen. In Afgooye between mid-March and mid-April water prices rose by 20% (from SoSh2,500 to SoSh3,000/200 litres), in Baidoa 40% (SoSh5,000 to SoSh7,000/200 litres) and in Marka by 100% (from SoSh8,000 to SoSh16,000/200 litres).

Figure 1: Imported Rice Prices Jan-April '07

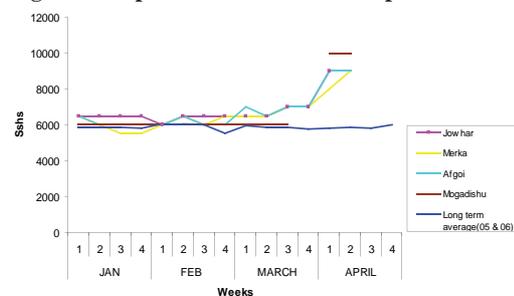
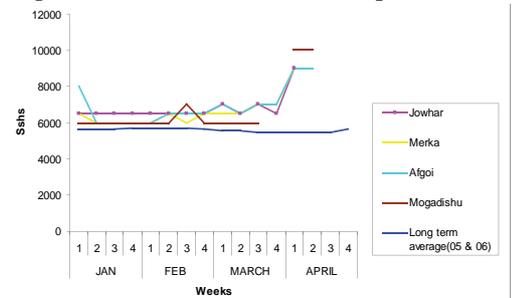


Figure 2: Wheat Flour Prices Jan.-April '07



civil insecurity

In areas where water supply depends on water catchments additional water demand will lead to earlier depletion of resources though *Gu* rains may mitigate any potential shortage.

Sharp and significant import commodity food and non-food prices

An additional shock for displaced populations and host communities is the sudden (within a two to four week period) and sharp increase in imported food and non-food commodity prices in the urban areas where displaced populations are located. The cost of imported commodities remained relatively stable in most markets during February and March. However, prices increased noticeably between the mid-March and early to mid-April in Mogadishu, the Shabelle Valley and central regions.

For example rice, wheat flour and sugar prices increased 50-67% in Mogadishu, 38% to 43% in Baidoa, 25-50% in Kismayo, and 25-38% increased in Merka and Jowhar between mid-March and mid-April (Table 1). These sharp and unusual price increases are attributed to the slowdown in port activities, the reduction in the importation of goods through Mogadishu, increased costs associated with transporting goods, as well as possible inflationary impact due to the concentrated and high demand created by the influx of IDPs into some urban locations. A mitigating factor to the increasing import food and non-food commodity prices is that locally produced cereals, especially sorghum (but also maize) are available in the markets and prices have remained fairly low (see Agriculture Section). Although maize prices have steadily increased since January '07, due to the poor Deyr '06/07 production, they are still lower than they have been for the last three years. Sorghum is also widely available and prices are low following the bumper Deyr '06/07 harvest.

Disruption and loss of livelihoods and income

Despite the availability of locally produced cereals in the market at relatively low prices, however, food access for displaced populations, especially the poorest, is significantly stressed due to the sudden disruption in livelihoods, loss of income earning abilities, combined with limited savings.

Outbreak and increasing incidence of Acute Water Diarrhoea (AWD)

Acute Watery Diarrhoea (AWD) outbreaks continue to spread across the country and are concentrated in the same areas containing the largest concentration of newly displaced populations (Map 6). Current reports from WHO estimate that between 1st January and 31st March 2007, a total of **12,429** cases of clinically diagnosed **AWD** including **414** related deaths (**CFR 3.33**) were reported from Central and South Somalia. Cases were reported from nine regions (Hiran, Banadir, Lower and Middle Shabelle, Bay, Gedo, Bakool, Galgudud and Lower Juba) with an estimated population of 3,799,636; the overall attack rate (**AR**) is **0.33%**. The ongoing displacement in Southern Somalia is of great concern due to the nutritionally vulnerable populations being affected. Although the impact of recent displacement on the overall nutritional status is unlikely to be manifested in the short-term, for newly displaced populations who do not have adequate shelter, access to clean water, or who contract Acute Water Diarrhoea (AWD) – their nutritional status will likely to deteriorate (see Nutrition section).

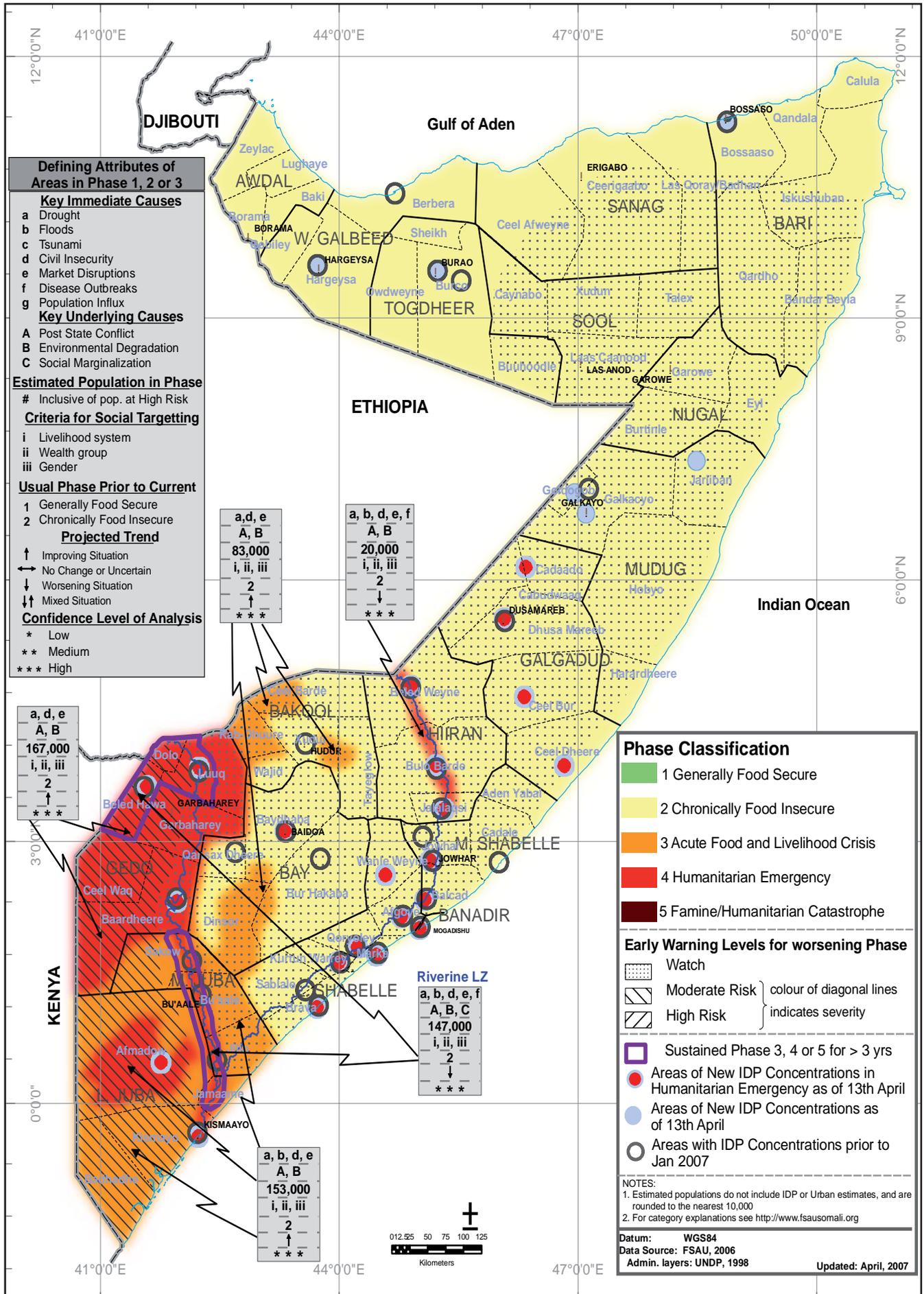
Key Defining Issues:

1. There is a rapidly deteriorating humanitarian situation for the newly displaced and for poor households in host urban communities in south and central Somalia;
2. Displaced populations within Mogadishu are facing a deteriorating humanitarian situation though this there is less information than for other areas;
3. The increasing insecurity in Mogadishu and surrounding areas is compounding the problems of humanitarian access and timely response to displaced populations in the Shabelle valley;
4. The start of the *Gu* rains could compound existing problems of shelter, water, sanitation and health;
5. The start of the *Gu* rains will compound existing problems of humanitarian access as roads become impassable;
6. The humanitarian situation will deteriorate further if fighting in Mogadishu continues or increases over the next few months.

Implications for Response:

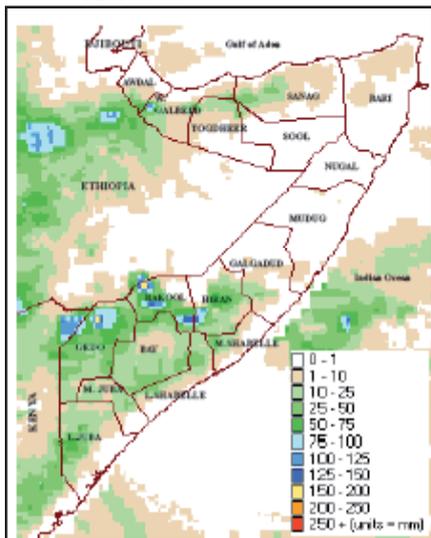
- **Humanitarian assistance to the most vulnerable** IDPs and host communities. This may include, depending on assessment recommendations, Non-Food Items (NFIs) and food assistance and measures to prevent the spread of AWD;
- **A commitment to and increased effort for conflict resolution and the protection of non-combatants in Mogadishu** - Increased effort and commitment to peace and conflict prevention by all national and international actors. Given the profound humanitarian implications of conflict in Mogadishu, compounding the current ongoing humanitarian situation in Southern Somalia, this should be a top priority;
- **Improvement in humanitarian access** to displaced and host communities in south and central Somalia. Increased advocacy and commitment to improving humanitarian access by international, national and local actors;
- **Continuing humanitarian assistance and livelihood support** in areas identified already in Humanitarian Emergency and Acute Food and Livelihood Crisis;
- **Strategic interventions to improve resilience of livelihood systems** to reduce risks and vulnerabilities to future shocks and to redress structural hindrances to achieving food security in populations identified already as Chronically Food Insecure.

Map 2: Somalia Food Security Situation Analysis: Post Deyr 06/07 Projection, January Through June 2007

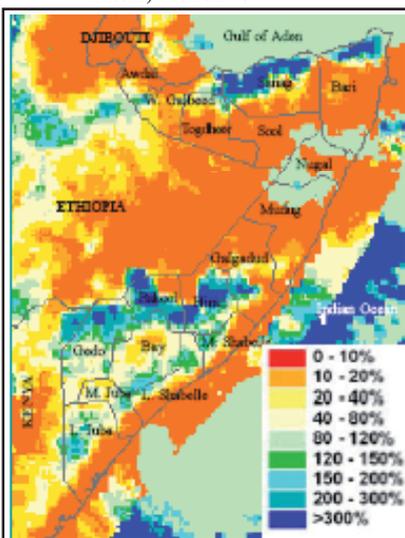


civil insecurity

Map 3: Cumulative Rainfall (mm), March '07



Map 4: Rainfall as % of Long Term Mean, March '07



Map 5: NDVI Anomaly Vegetation Conditions April 1-10 '06



Source: USGS/FEWSNET

CLIMATE

Normally, March is the harshest period of the long, hot and dry *Jilaal* season in Somalia before the start of the *Gu* rains in mid-April. However, due to the above normal *Deyr* 2006/7 rains, the *Jilaal* season this year was very mild and water, pasture and browse conditions remained above normal in most parts of the country (Map 5). Satellite imagery indicates and field reports confirm that light showers, locally known as *Todob* or *Jar* rains, fell over many parts of southern Somalia, including Juba, Gedo, Bakool and Hiran regions in March (Map 3 & 4). In the northwest, sporadic rains also fell in March in parts of Awdal, the highlands of Togdheer and the Hawd of Hargeisa, and in the Ethiopian highland catchment areas of the Juba and Shabelle rivers.

In the first two weeks of April, good rains (>50mm) were received in the pastoral areas of the Hawd of Hargeisa, and parts of Awdal and Togdheer (see also FEWS NET, Somalia Rain Watch, 16 April 2007). Most of the upper catchments of the Juba and Shabelle river basins in the Ethiopian highlands also received heavy rains during the first dekad of April. Field reports also confirmed rains (of up to 30 mm) fell in the southern agricultural regions of Bay, Middle Juba, Lower Juba, Gedo and parts of Bakool.

The timely start of the *Gu* rains during March and April have begun to replenish water sources, further improve rangeland conditions and enhance timely land preparations for crop germination. As pasture was already good and widely available during the *Jilaal*, these initial *Gu* rains have not prompted major livestock migrations (see Livestock Sector).

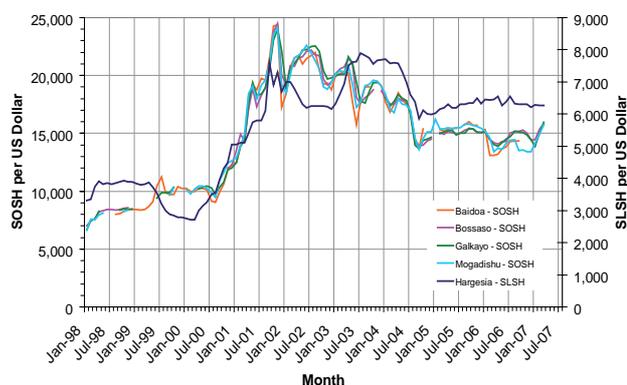
MARKETS

There is a significant slow-down of activities in the main Mogadishu port in late March and early April due to increasing levels of insecurity in the city, renewed marine piracy and the imposition of new port tariffs. No commercial vessels docked in the port in the last two weeks of March and early April. This slow down is having a direct impact on the availability and prices of imported food and non-food commodities within the Mogadishu market catchment area. Import commodity prices have increased sharply between mid-March to mid-April in several key main markets in the south and central. For example, between mid-March and mid-April imported rice prices increased 67% in Mogadishu, 43% in Baidoa and Beletweyne, and 38% in Jowhar, Afogye and Merka. Insecurity has also disrupted market activities, informal trade and the casual labour market in Mogadishu.

Traders have responded to the insecurity by closing stores, closing warehouses, moving goods out of stores to safer locations within Mogadishu and to locations outside of the city during lulls in the fighting, and reports even suggest stockpiling commodities for price speculation. If the fighting continues in Mogadishu, the marine piracy issue remains unresolved, and the 'taxation' of imported commodities at the port continues to be contested (although at the time of writing negotiations are taking place), the price of imported commodities will continue to increase as the number of vessels docking and unloading decreases.

The depreciation of the Somali Shilling against the dollar noted between January and February (FSAU, Quarterly Brief, March 16, 2007) continues with further depreciation in south, central and northeast Somalia in March (5% in Mogadishu, 6% in Galkaayo, 11% in the Shabelle and Juba valleys, and 2% in the Sorghum Belt) (Figure 3)

Figure 3: Monthly Exchange Rates - SOSH and SLSH to USD



AGRICULTURE

Extensive flooding in the Juba and Shabelle river valleys in October and November 2006 destroyed an estimated 53,000ha of maize, 70,000ha of sesame, and 9,500ha of cowpea (Technical Series Report No. V.12). However, flooding also brought opportunities for off-season flood recessional crop production, which was initially projected to include 20,000MT of off-season maize and 18,500mt of off-season sesame. Findings from the FSAU and partner Off-season Post Harvest Crop Assessment (March 17 to April 7), however, estimate that total off-season cereal production was 11,000mt of maize, or 52% of initial projection.

The majority of this off-season production, or approximately 80%, is from one region, Middle Shabelle and when off season maize production from Lower Shabelle is included, 90% of the total off season maize production is from Shabelle Region. Middle Shabelle is the only region where off-season maize production, at Xmt, was higher than initially projected (130%), while the other five regions were significantly less, between 5-40% of initial projections. Lower Shabelle at 900mt is 12% of projected harvest (of 7,340mt), while Middle Juba at 500mt is 37% (of 1,340mt), Lower Juba estimated at 300mt is 17% (of 1,800mt), Gedo estimated at 110mt is 22% (of 500mt) and Hiran estimated at 120mt is 5% (of 2,400mt). Off-season sesame production is also well below initial projections (at 29%) at an estimated 5,103mt, with 48% coming from Lower Shabelle, 24% from Middle Juba, 10% from Hiran and 10% from Lower Juba. Cowpea production is insignificant and estimated at 450mt, which is 17% of initial projection. Overall, the reasons for the poor performance of the off-season crop production vary by region, but include an oversaturation of soils as flood waters remained longer than expected, corresponding with low tillage capacity and increased weeds, significant crop damage by insects (e.g. army worms), and the low utilisation of farm inputs in some areas related to increased diesel prices and limited availability of seeds.

As projected, maize prices are continuing to increase from January '07 due to a combination of the poor *Deyr* '06/'07 maize production, followed by a poor off-season maize production and, therefore, low local availability and supply (Figure 4). Consequently, average maize prices increased by 23% (from SoSh 2,012 to SoSh2,477/kg) and 42% (from SoSh1,233 to SoSh1,751/kg) between February and March '07 in the Shabelle and Juba regions, respectively. Maize prices, however, are still lower than their peak levels of the past three years (FSAU Market Data Update, April 2007). For example, in Shabelle region current March '07 maize prices are 7% and 14% lower than March '06 and March '05 maize prices, respectively. Likewise, in Juba region March '07 maize prices are 18% and 34% lower than March '06 and March '05 maize prices, respectively.

In most markets in the South and Central regions, maize prices remained fairly stable during the period of increased conflict in Mogadishu (between mid-March and mid-April) with the exception of four markets in Shabelle and Bay regions. During this period maize prices increase are noted in the main markets of Badioa in Bay region (67% increase), Qoryooley and Marka in Lower Shabelle (25% and 14% increase, respectively), and Jowhar in Middle Shabelle (13% increase). In all other markets in the South and Central regions, maize prices either remained unchanged or decreased. Decreases in maize prices during this period were observed in Belet Weyne in Hiran region (8%), and in Bardheere and Luq in Gedo region (17% and 25 decrease, respectively). Sorghum prices, continue to fall in all the markets in the south and central regions, following the bumper harvest in the *Deyr* '06/'07 season. In the Sorghum Belt, between February and March this year the average price of sorghum decreased by 6% (from SoSh 1,277 to SoSh1,200/kg). March '07 sorghum prices are 17% lower than they were in January '07 and are currently at an all time low as compared to the last 15 years. The trends in maize and sorghum prices are contributing to similar trends for terms of trade or purchasing power for poor wealth groups (kg of maize or sorghum per labour daily wage depending on areas). Terms of trade (maize to labour) have decreased in the Juba and Shabelle valleys between February and March by 29% and 13% respectively due to the increase of maize prices and a decrease in wage rates (Figure 5). In the Sorghum Belt, terms of trade (sorghum to labour) have continued to increase, by 4% (from 24.58 to 25.56kg of sorghum) between February and March as sorghum prices fall. This rate is currently the highest since FSAU began collecting market price data (in 1998).

In the Juba and Shabelle regions, for those who are maize purchase dependent income from *Gu* season agricultural employment opportunities will be increasingly important.

Figure 4: Regional Trend in Cereal Prices (US\$)

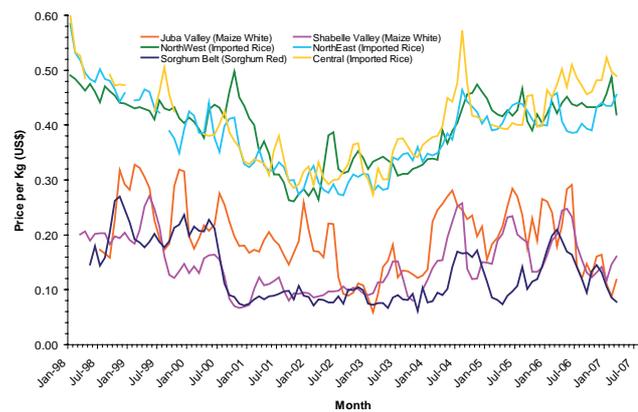
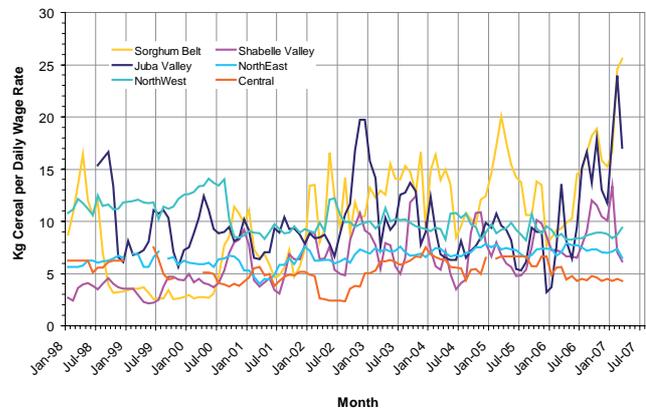


Figure 5: Regional Trend in Terms of Trade: Cereal to Labour



LIVESTOCK

Livestock body conditions for all species (cattle, sheep, goat, and camel) are good throughout the country due to a very mild *Jilaal* dry season (January to March '07) in which pasture, browse and water was widely available in most regions. Rains received in March to mid-April (see Climate article) have begun to replenish water sources and further improve rangeland conditions. As pasture was already good and widely available, the initial *Gu* rains have not prompted major livestock migrations. In the central regions, water sources were stressed in some areas during the *Jilaal* season as the region is dependent on berkedes for water. Consequently, the price of water in El-Dheer (Galgadud region) increased from SoSh 10,000 to SoSh 15,000/200 litre drum between January and March '07. The onset of the *Gu* rains should begin to ease water problems in the central regions and other localized areas where water was constrained following poor *Deyr* '06/'07 rains (e.g. parts of central region and localized areas in the northeastern regions).

Overall, milk availability is improving throughout most of the country as kidding and calving (goats, sheep, cattle and camel) began in March and is anticipated to increase further until May. Camel calving is ongoing in parts of the central and northern regions, though expected to peak during the *Deyr* of 2007/'08. In the worst drought affected regions of the south (Gedo, Hiran and Juba regions), as anticipated, high rates of sheep/goat kidding are reported in February and March, and high rates of cattle calving are expected to begin in May.

In general, incidence reports of the unknown camel disease and symptoms of RVF continue to decline. In January '07 the total number of livestock exported through Bossaso and Berbera ports dropped dramatically, a 75% reduction between December '06 and January '07, following the closure of export markets in the Gulf States (Figure 7). In February sheep and goat exports also remained low, however, export markets began to reopen in March and the total number sheep and goats exported from the two northern ports increased significantly up to 376,439 heads, of which most were exported through Berbera port (280,339 sheep/goats in March '06). Total livestock exports from Bossaso increased from February to March (from 70,310 to 104,090 head), and are nearly up to March 2006 and March 2005 levels (109,853 and 108,034 head respectively). Total exports from Berbera in March are substantially higher (at 284,473) than for the same period last year (206,230) (Figure 7) though the reasons for this are not yet clear. In addition to the export of live animals, the slaughter house in Burco town re-opened in the middle of March.

In late March the cattle market in Garissa also re-opened, but the official border closure is still in place. Reports suggest, however, that cross-border livestock trade is taking place despite the official border closure. Although average terms of trade (cereal to goat) have decreased between February and March in the Juba region (27%, from 253.43 to 185.19kg) and Shabelle region (5%, from 162.82 to 155.03kg) due largely to maize price increases (see Agriculture section), terms of trade is still above long term averages for the season (Figure 6). In the Sorghum Belt terms of trade (cereal to goat) increased over the same period by 8% as the price of sorghum continued to decrease (from SoSh1,277 to SoSh1,200/kg) and the value of goat increased (from SoSh296,000 to SoSh299,000/head).

Figure 6: Regional Trend in Terms of Trade: Cereal to Goat

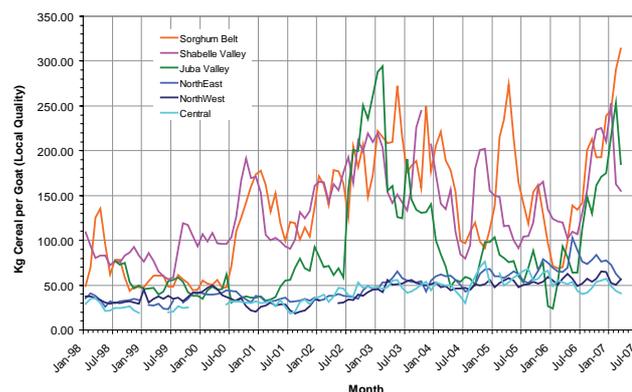
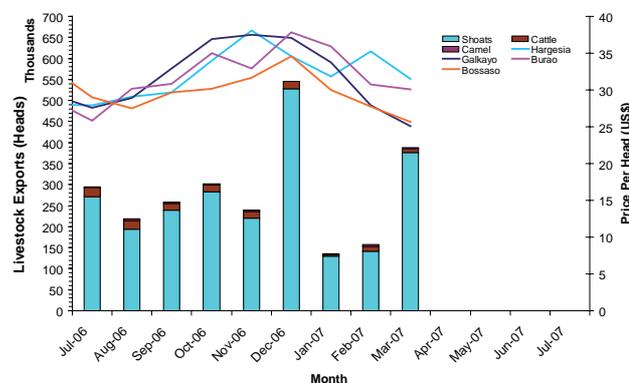


Figure 7: Berbera & Bossaso: Livestock Exports (Heads) and Export Quality Goat Prices (US\$)



livestock



1. Cattle at Guban (NW) with Good Body Condition
2. Shinniile Camels at Northwest Somalia (Calving Rate Increase)

NUTRITION

Seven nutrition assessments were conducted in late February and March in South and Central Somalia, four in Hiran region, two in Bay region and one in Bakool region. Six out of these seven assessments reported consistent critical levels of malnutrition of 15-20% ¹Global Acute Malnutrition (GAM).

Bay Region: FSAU in collaboration with UNICEF and IMC conducted two district wide assessments (in Dinsor and in Qansadhere). Both assessments indicted no significant change from previous nutrition assessments conducted at the same time of year with results of acute malnutrition remaining critical at **19.9% (17.3-22.7) GAM and 2.7% (1.8-4.0) ²Severe Acute Malnutrition** in Dinsor and **17.9% (15.5-20.6) GAM and 3.5% (2.5-5.0) SAM in Qansadhere**. It is suspected that this persistently high acute malnutrition is attributed to poor access to health care with over 50% of the children reporting an illness in the two week period prior to the assessment, limited dietary diversity due to limited availability of milk and the recent influx of IDPs from conflict affected areas in the south. Mortality rates of both the general population and under fives were at alert levels in Dinsor and acceptable levels in Qansadhere.

Hiran Region: FSAU in collaboration with UNICEF, IMC, SCUK and CARE conducted four livelihoods based nutrition assessments in Hiran region in April. In the last six years the overwhelming majority of nutrition assessments conducted at different times of the year consistently report critical rates of acute malnutrition of 13-20%. The results for the Hiran Riverine Population were critical at **18.2% GAM (15.7-20.9) and 3.0% SAM (2.0-4.3%)** consistent with the most recent assessment conducted in 2002 and 2003. This is not surprising given the loss of assets following the flooding and the ongoing acute watery diarrhoea. In Belet Weyn town results were somewhat lower though still serious at **12.6% (10.6-15.0) GAM and 1.1% (0.6-2.1)**, most likely due to improved access to basic services. For the pastoral and agropastoral population in Hiran region nutrition results remain critical at **15.7% (13.4-18.3) GAM and 1.7% (1.0-2.8) SAM**, again consistent with the most recent results reported in July 2003. For Belet Weyn district as a whole the rates of malnutrition reported were also critical at **15.4% (13.1-17.9) GAM and 2.0% (1.2-3.2) SAM**, again these results do not indicate any significant change from the most recent assessment conducted in 2003.

Bakool Region: Action Contre la Faim (ACF) conducted a nutrition assessment in Wajid and surrounding areas in February and reported rates of acute malnutrition of **15.6% (12.4-18.8) GAM and 1.1% (0.2-2.0) SAM**. These results are consistent with an assessment conducted at the same time last year in March '06 though indicating an improvement from the most recent assessment conducted in July '06. These results are in line with expected seasonal trends.

¹Global Acute Malnutrition measured estimated using % weight for height <-2 Z scores
²Severe Acute Malnutrition estimated using % weight for height <-3 Z scores

Map 6: AWD Cases, Deaths & CFR in South and Central Somalia Jan 1 to March 31, 2007

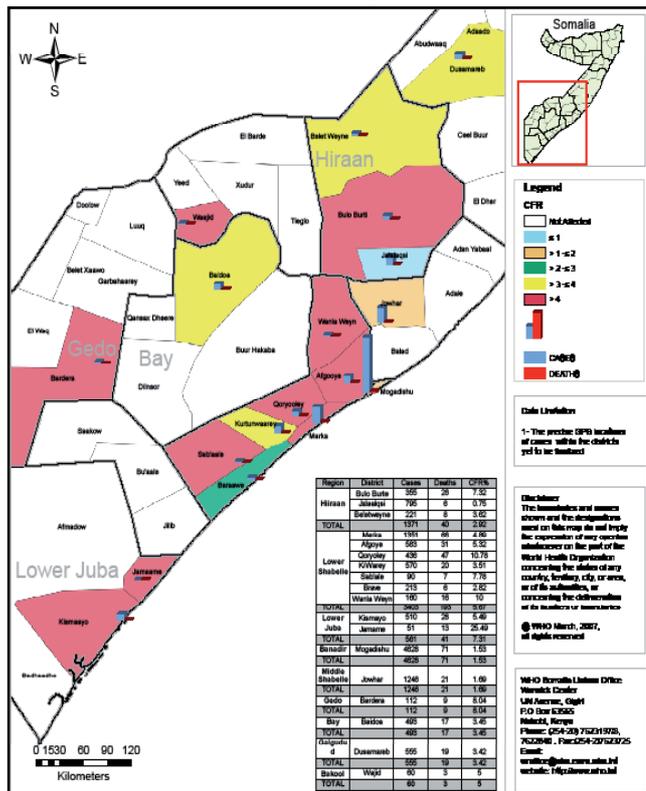
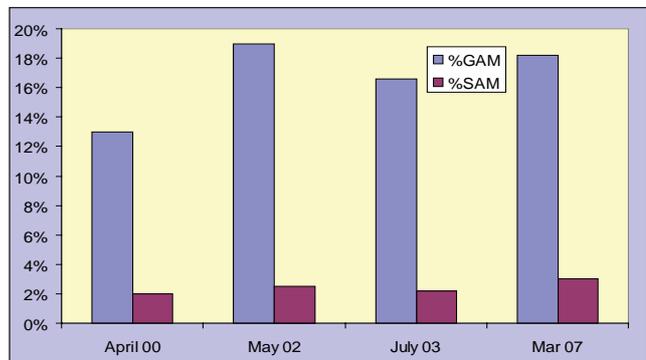


Figure 8: Trends in Acute malnutrition, Hiran Riverine, 2000 to 2007



REGIONAL HIGHLIGHTS

SOUTHERN REGIONS

Increasing civil insecurity in Mogadishu has led to a reported 250,000 people displaced to neighbouring regions, mainly to Lower and Middle Shabelle regions though also further afield (see Conflict section). Monitoring of key reference markets in southern Somalia indicates that cereal is available in all markets.

However, the supply and price of imported commodities has been affected by the recent fighting in Mogadishu, the imposition of port tariffs, and a devaluation of the Somali shilling (see Market and Mogadishu analysis sections).

Localised rainfall in the Juba Valley and Sorghum Belt improved pasture conditions and water availability (see Climate section). Average local quality cattle prices increased between February and March by 4% in the Sorghum Belt, 4% in the Shabelle Valley, and 10% in the Juba Valley though the prices in the Sorghum Belt and Juba valley are considerably higher than for March 2006 (162% and 99% respectively). Local quality goat prices increased between February and March in the Shabelle valley by 17% and Sorghum Belt by 1%, but decreased in the Juba valley by 4% due to lower demand. Average maize prices increased in the Shabelle and Juba Valleys respectively in line with expectations and in the Sorghum Belt the average price of sorghum has decreased in line with expected seasonal trends due to the good Deyr harvest and local supply (see Agriculture section).

nutrition/regional highlights

Off-season crop harvest was undertaken from 17th March to 7th April 07 in both Shabelle and Juba Valley riverine areas. The off-season maize production was estimated to be 52% of the projected off-season cereal production in 2006/07 Post *Deyr* Analysis and this reduction is attributed to flooding that remained longer than expected, the impact of insect damage, and the low utilisation of farm inputs (see Agriculture section). Although this off-season maize production may improve food access in the short term for these farmers the production has not been significant enough to reduce average maize prices throughout southern Somalia which are continuing to rise and will do until the next harvest.

CENTRAL REGIONS

As forecast, (FSAU Technical Series Report No. V., 12) sorghum prices have declined in Hiran region as local production from agro-pastoral areas of the region enters the main regional markets. The price of sorghum continues to decline, by 32% between December and March (from SoSh3,250 in December to SoSh2,200/kg in March) and 8% between February and March (from SoSh2,400 to SoSh2,200/kg). White maize, however (mainly from Ethiopia) has increased by 20% between February and March (from SoSh2,000 to SoSh2,400/Kg), the same price as December '07 (SoSh 2,400/kg). The decline in price of sorghum maintains beneficial terms of trade for pastoralists in the region (see Livestock section).

For riverine communities, however, agricultural opportunities declined with the loss of the expected *Deyr* off-season production, which is further limiting access to income and, therefore, food. Terms of trade for poor households (cereal to labour) decreased by 9% between February and March (from 16.67kg in February to 15.11kg in March) though opportunities will increase in the next month in line with preparations for the coming *Gu* season. There have been no reports of the unknown camel disease in Hiran, Galgaduud and south Mudug though reports of suspected Contagious Caprine Pleuro-pneumonia (CCPP) observed on sheep and goats in the Addun livelihood zone have been received.

NORTHERN REGIONS

Following the risk factors identified in the 2006/2007 Post *Deyr* Analysis (FSAU Technical Series Report No. V., 12) and the last Food Security and Nutrition Quarterly Brief (March 16, 2007), there have been no new reports of the unknown camel disease in the northern regions suggesting a stabilization or reduction in the problem. Despite fears arising from reports of RVF in southern Somalia during the *Deyr* season there has not been any deterioration in livestock prices and, importantly, terms of trade that is not in line with expected seasonal trends.

In the northwest, average prices of export quality goat have declined, in line with seasonal trends, from SSh 197,625 in February to SSh 179,125 in March, or 9% decline. They remain, though higher than prices in March '06 (SSh 177,500). The slight decrease in export quality goat prices is offset by an increase of 1% in local quality goat prices from February to March '07 (from SSh158,125 to SSh 160,000).

Terms of trade (local quality goat to rice) have also remained advantageous (at 56.27kg, a 12% increase from February). Similarly, in the northeast, average export quality goat prices decreased by 1% between February and March (from SoSh412,500 to SoSh408,333/head), but are 5% higher than for March '06. However, terms of trade between local quality goat and imported rice has decreased by 9% as goat prices declined and imported rice prices have increased (from SoSh6,542 to SoSh7,000/kg or 7%) between February and March (see Market section).

The locust situation in Awdal region has improved over the past few weeks (ETOP Update 1st dekad April, 2007) though at the end of March a locust swarm was reported flying over Borama, Harirad and then Qulujeed crossing to the border to the Harawa grazing area of eastern Ethiopia. Consequently, control measures that were planned for Awdal region were redeployed to eastern Ethiopia. In the previous Quarterly Brief (March 16, 2007) we noted the presence of livestock from the neighbouring Somali region of Ethiopia after clashes in the Daroor grazing areas. These pastoralists have now started to return following reconciliation efforts in the area. Rangeland resources are improving after rains were received during March and the first two weeks of April.

Recent and forthcoming publications and releases

FSAU/FEWSNET Market Data Update, April 2007
FSAU/FEWSNET Climate Data Update, April 2007
FSAU Technical Series '06 /07 Post Deyr Analysis, March 2007
FSAU Nutrition Update, March, 2007
FSAU Technical Series 2006 Post Gu Analysis, September 2006

NOTE: The above publications and releases are available on the FSAU website: www.fsausomali.org

Technical & Managerial Support



Funding Agencies



Technical Partners

