

Food Security & Nutrition

Issued December 22, 2015

Quarterly Brief - Focus on Post-Deyr 2015/16 Season Early Warning

Climate

Civil
Insecurity

Livestock

Agriculture

Markets

Nutrition

Integrated
Analysis

**KEY
ISSUES**

Based on the Food Security and Nutrition Analysis Unit's (FSNAU) preliminary, outlook, acute food insecurity is expected to persist in most parts of Somalia although slight improvements are expected, in some pastoral, agropastoral and riverine livelihoods of southern regions. Based on the Integrated Phase Classification (IPC) food insecurity severity scale, the overall number of people in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) is expected to remain stable or increase slightly in the first half of 2016, particularly in drought affected areas of north, while most rural livelihoods are likely to be classified as **Minimal** or **Stressed** (IPC Phase 2). Acute food security crisis (IPC Phase 3) is expected to persist in urban areas affected by trade disruptions (Huduur, Wajid, Bulo burto) and across most of the main IDP settlements.

As a result of largely normal Deyr rains, near average to average crop production is expected in the main cereal producing regions of Lower Shabelle and Bay, which normally account for over two-thirds of the Deyr cereal production in southern Somalia. However, domestic production of cereals is expected to be near average due to well below average Gu-Karan harvest in the Northwest (lowest in Decade)) as well as an anticipated shortfall in Deyr harvest in the regions of Juba and Middle Shabelle (Jowhar Riverine). A short-term decline of food security conditions (through March/April 2016) is expected in riverine parts of Juba and Middle Shabelle due to floods, although this is likely to be mitigated by a modest improvement of off-season cereal and sesame production expected by March-April. Pasture and water shortages could be expected in large parts of Northern regions and pockets areas in Gedo, Juba regions and along the Coast of south.

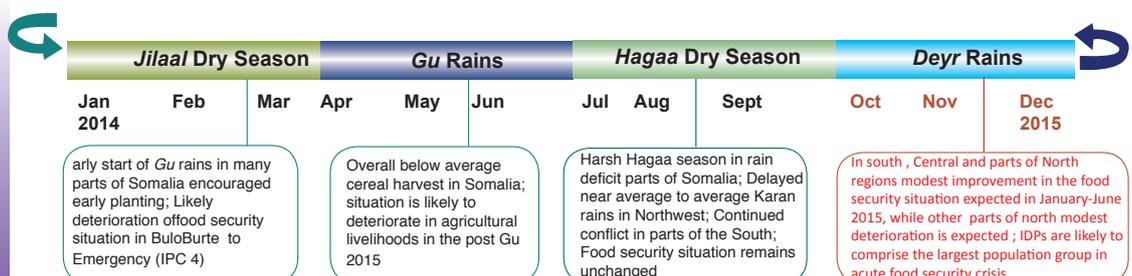
Findings of Deyr 2015 nutrition assessment among 13 IDP settlements across Somalia indicate an improvement in nutrition situation among IDPs in Dhobley and Baidoa, while rapid deterioration was noted among Bossaso IDPs (12.5 % to 16.8 %) in Northeast region. Critical levels of Global Acute Malnutrition (GAM rate ≥ 15 %) were observed among four out of 13 IDP settlements surveyed during Deyr 2015 assessment. These are Dolow IDPs in Gedo (south), Bossaso, Garowe and Galkayo IDPs in Northeast. Despite continued support interventions, relatively high morbidity incidences and low immunization coverage remain major contributing factors of acute malnutrition as reported in nearly two thirds of the assessed camps. Over the past six months, a 14 percent decline was reported in the number of caseloads (prevalence). Approximately 16500 under-five children were found to be acutely malnourished with majority (57 percent) located in Mogadishu IDP settlements. Based on the United Nations High Commissioner for Refugees (UNHCR) data, over 22 089 IDPs have been evicted from the settlements between August - October 2015, primarily from governmental buildings. More evictions are likely in the coming months, which will have implications on food security status of this population group.

Trade disruptions due to prevailing insecurity continued to persist in some urban areas of Bakool (Huddur and Wajid districts) and Hiran (Bulo-burti district) where access roads remain under insurgent control. Based on the UNHCR data, insecurity caused a displacement of nearly 78 000 people since August 2015. The Consumer Price Index (CPI) showed relative stability with mild increase in the cost of living in most urban areas in July-November 2015 period. Expected declines in cereal prices after the Deyr harvest enters the market (January-February 2016) is likely to exert a further downward pressure on the cost of living up to March 2016. However, this trend could be compromised by security conditions, particularly in southern parts of the country. Cereal price trends in the subsequent period (April-June 2016) will be influenced by such factors as the Gu rainfall performance, which is yet uncertain, as well as humanitarian relief interventions.

Continued humanitarian interventions are necessary at least up to the end of June 2016 to address prevailing acute food insecurity conditions in Somalia.

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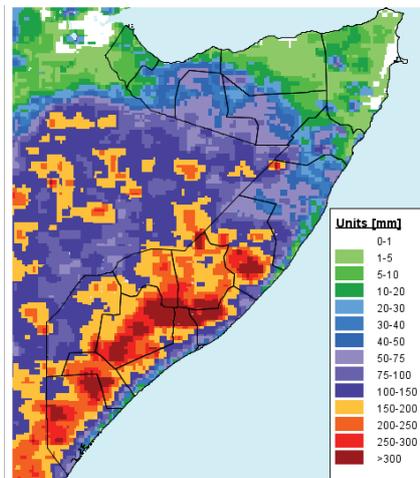


Somalia Seasonal Timeline & Key Events

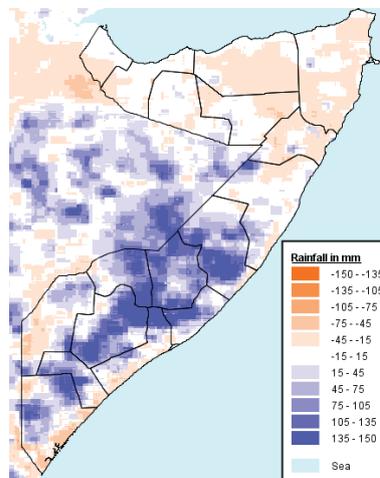
SECTOR HIGHLIGHTS

CLIMATE

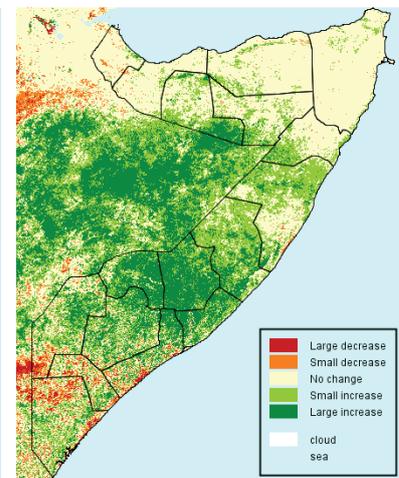
Map 1: October-November FEWS/RFE 2015
Cummulative Seasonal rainfall



Map 2: October-November FEWS/RFE
2015 Seasonal rainfall anomaly
(%) from LTM (1999 -2014)



Map 3: NDVI E_MODIS Anomaly
December Dekard 1, 2015



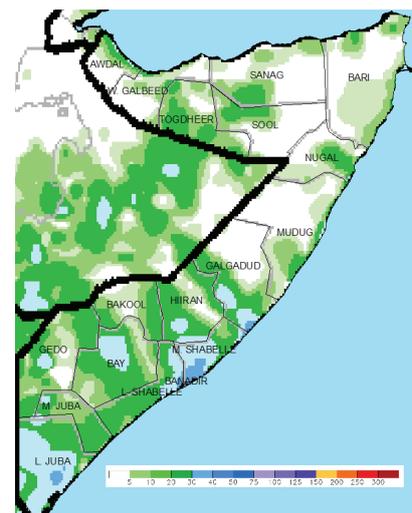
Overall the Deyr (October- November) 2015 rains received in regions of Somalia has been generally mixed. Average to above-average rains with good spatial and temporal distribution fell in most parts of the southern and central regions of the country as well as some parts in Sool and Togdheer regions in Northwest. However, the rains were below average and large parts in Bari and Nugal regions of the Northeast, and some parts of Awdal, W. Galbeed, Sool and Sanaag regions of the Northwest.

In the northern and central regions, the rains started in early October in some areas while most of Bari, Sanaag and Awdal regions remained almost dry during the month of October. Largely, the agropastoral livelihood zones in Awdal, Woqooyi Galbeed, and Togdheer regions received insignificant rains. Guban pastoral livelihoods in the Northwest that usually receive Hays (December-January) rains received some unusual rains in (late October to November 2015) which have been contributed to rangeland regeneration. In Hawd and Adun pastoral livelihoods zones in Northern regions including North Mudug, Nugal, Sool and Waqooyi Galbeed and the central pastoral and the Cowpea Belt livelihoods the rains have been generally favorable. Conversely, rains were well below-average in most of Guban pastoral livelihood zone of Sanaag region, Berbera District (Woqooyi Galbeed), and parts of coastal Dheeh in Iskushuban district (Bari).

In the South, the Deyr 2015 started timely and effectively from mid-October, with some areas in Lower Shabelle and Bay regions benefiting from early rains September and early October. Mostly the rains were average to above-average in terms of amount and distribution for all pastoral and agropastoral livelihoods in Bay and Bakool regions and large parts of Lower and Middle Shabelle and Hiiraan regions. Most areas received cumulative rainfall amounts of 150-300mm with some pockets receiving amounts exceeding 300mm. Light showers were recorded in the beginning of the season for most parts of Middle and Lower Juba but rains intensified and significant amounts fell in both regions during the month of November and December. Above-average rains caused flash floods in several villages in Baidoa, Burhakaba and Qanshadhere (Bay region) damaging underground grain storages. However, coastal areas in Lower and Middle Juba, and Lower Shabelle regions in the South and a large part of Southern Inland Pastoral Livelihood in Gedo received relatively smaller amounts of rainfall (50-100mm) that were 15-45 mm below the long term mean (Map 2). Massive amounts of rainfall in the upper river catchments of Ethiopia between September and November led to rising river water levels in the Shabelle and Juba rivers leading to limited river flooding in Beledweyne town (Hiiraan), and many villages of Jowhar and Balad Districts (Middle Shabelle), and Kamsuma village of Jammaame District (Lower Juba).

Normalized Difference Vegetation Index (NDVI) anomaly derived from the E-MODIS satellite for the first dekad of December 2015, vegetation condition in most parts of the country (Map 3). However, decrease of vegetation vigor is observed in key pastoral areas of Awdal, Bari and Sanaag regions, coastal areas of the South and localized areas

Map 4: NOAA Raifall forecast valid up
to 24 Dec, 2015

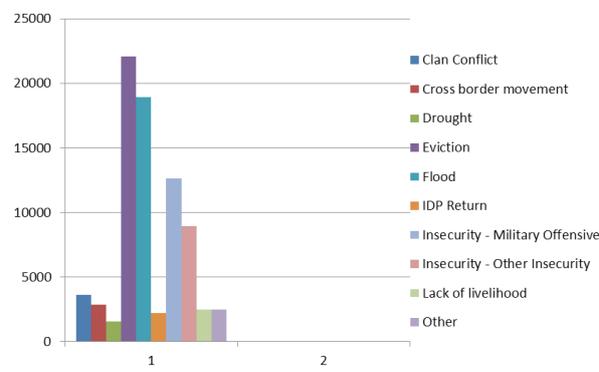


in Middle Juba, Lower Juba, and Gedo regions. The rainfall forecast valid up to December 24, 2015 by the National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Centre (CPC) indicates likelihood of further rains in most parts of South including Bay, Bakool, Gedo, Hiran, Jubas and Shabelles Regions (Map 4). According to the forecast, the rest of the country will likely remain dry.

CIVIL INSECURITY

Between September and November 2015 incidences of violence such as suicide bomb explosions, land mines, targeted killings, and armed confrontations, have continued in the southern regions, particularly in Mogadishu, Hiran, Gedo, Bay, Bakool and Lower Juba. Most of the incidences were directed at Somali Federal Government officials and partners, while scores of civilians got injured or killed. On the other hand, the Government of Somalia together with its allied African Union Mission to Somalia (AMISOM) forces remained in control of the major commercial and administrative towns of Southern Somalia regions except Middle Juba which is totally controlled by the Insurgents.

Figure 1: Population Displacements Countrywide (September-November 2015), UNHCR



Politically instigated clashes that erupted in Galkayo have resulted in large number of human deaths and widespread civilian displacements to neighboring towns such as Burtinle, Garowe, Dusamareb, Hobyo and even other villages. Despite a ceasefire jointly mediated by the Federal Governments of Somalia and other regional administrations such as Jubaland state and South West state in conjunction with regional bodies such as IGAD, the situation calm down a little bit but still remain in dangerous standoff (Figure 1).

On 11th November 2015, three elders were murdered outskirts Balambale town (Galgadud region) due to clan retaliation; this incident led to fleeing of the communities involved resulting in the restrictions of pastoralist migration opportunities to access pasture around Abud-waaq district. Clan based conflicts led to the disruption of business activities for nearly a week in Belet-Wayne town when a UN staff who hails from the areas was killed by Hiran administrations militias.

The effects of trade embargo in areas recovered by the governments in 2014 in the Southern regions of Bakool (Wajid and Hudur), Bay (Qansahdere), Gedo (Bardhere and Burdhubo) and Hiran (Bulo-Burte) have eased somewhat. Prices of essential staple commodities in these areas have stabilized due to food aid delivered to the affected areas through an organized military convoy (Bulo-Burte); opening up of secondary supply routes (Hudur, Rabdure, Tieglow and Wajid) and adjustments made by local traders to bring food to the areas, including using of donkey carts and medium size trucks. Wage labour rates have also improved significantly in most of their towns. However, there are still trade flow disruption and siege in Jalaqsi (Hiran) and Dinsor town (Bay region) where prices of staple food items (rice, wheat, sugar and veg oil) have nearly doubled in November 2015 compared to same month last year and increased slightly (10%) above the five years average. There are relatively minimal effects in terms of trade flow in Bardhere (Gedo) region and Qansahdere (Bay).

According to UNHCR, between September and November 2015 (last three months with available data) an estimated 77,789 persons were internally displaced across, 28 percent of this was due to evictions (22 089), 24 percent was due to floods (18 944), 16 percent was due to military offensive (12 633), 11 percent due to other insecurity (8 935), 5 percent due to clan conflict, 4% due to cross border movements and the remaining 11 percent was contributed by others (7 190) including lack of livelihoods, clan conflicts and others.

According to UNOCHA's Snapshot (December 2015), humanitarian access is impeded by effects of limited infrastructure, insecurity, administrative impediments and capacity limitations. Attacks and threats against humanitarians are on the rise. Since January 2015, 120 incidents that directly impacted humanitarian organizations have led to the death of 12 aid workers, injury of 17, arrests of 36 and abduction of eight (8) people.

AGRICULTURE

FSNAU conducted a preliminary assessment (November 2015) to evaluate the Deyr 2015/16 crop conditions and performance in Somalia. The assessment result indicate that area planted under cereal crops are average to above average in most of southern regions due to good rains with normal spatial and temporal distribution. Main crop planted in this season are maize, sorghum and cowpeas. However, large areas in Juba and Shabelle regions were also covered by sesame, although excess sesame supply in the market and falling global prices discouraged farmers from expanding planted areas. Most of the planted maize and sorghum is expected to be harvested from late December 2015 to January 2016, while off-season crops will be harvested during February -March 2016.

Cereal crops have performed well in the major cereal producing regions of Southern Somalia. In Lower Shabelle, the planted area is expected to be below average owing to late and moderate rains in riverine areas, delayed planting activities due to fears of El-Niño floods; high input costs; ongoing conflicts and falling prices. However, good crop conditions are reported in agropastoral areas of Wanlaweyne and riverine areas of Afgoye, Qoryoley, Kurtunwarey, Sablale, and Marka due to moderate rains supplemented by irrigation. Exceptions are coastal areas of Lower Shabelle (maize rain-fed areas in Marka and Barawe districts), where maize production is likely to be below average due to light and late rains, which delayed planting activities and impeded early crop growth, limiting potential crop yields. In Bay region, which is a major sorghum producer, the outlook for the Deyr 2015/16 crop production is promising in all districts. Although above average rains have hampered farming activities in some areas, the improved soil moisture has encouraged early planting and expansion of cultivated areas. Preliminary crop assessment indicates that Deyr 2015/16 cereal production is likely to be average to above average with better harvests compared to last two seasons. Similar situation of above average crop harvests is also forecasted in Gedo, Bakool and Hiran regions.

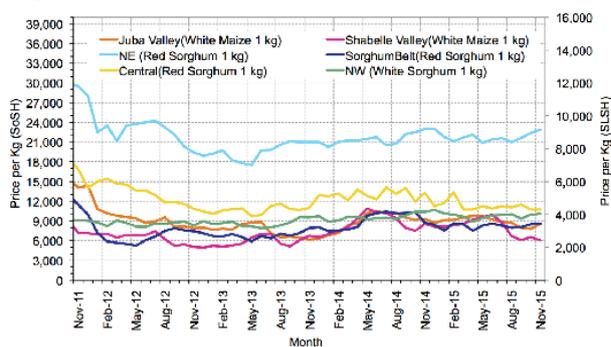
In Middle Shabelle, the crop production is expected to be above average in agropastoral areas of Jowhar and Balad due to good rains and early planting. The projected harvest in riverine areas will be below average as a result of floods and late planting. For instance, the recent floods (October) in Jowhar/Mahaday district have destroyed standing crops and damaged agricultural infrastructure (canals and culverts). Similarly, limited floods occurred in Balad riverine in the 3rd dekad of October affecting about 800 ha of crops (maize, sesame and cash crops). The floods were exacerbated by weak river embankments and deliberate river breakages, especially in the lower reaches of the Shabelle River.

In Juba regions, expected cereal production will be below average due to late and moderate rainfall and delayed crop planting in riverine areas due to fears of El-Niño floods. Along the Juba riverine there was successive replanting in November and crops are still in early stage of growth which will likely be harvested in February/March 2016, extending the agricultural lean season in these areas and could lead to decrease of the harvests due to moisture stress. The off-season cereal harvest will contribute cereal availability in Lower/Middle Juba, Middle Shabelle and Gedo regions.

Based on the joint FSNAU/Ministry of Agriculture Somaliland crop assessments in November 2015, the estimate of crop harvest indicate low cereal production in Gabiley and Baki districts compared to projections made in July 2015, while total crop failure was reported in Hargeysa and Borama districts due to moisture stress. The Gu /karan 2015 cereal production was about 7 700 metric tonnes, which represented 13 percent of the Gu/Karan PET (2010-2014) cereal productions due to poor and erratic Gu/karan rains at critical stages of crop establishment and development.

As a result of good seasonal performance, average cowpea production is expected in the Cowpea Belt of Central Regions. The promising Deyr season and off-season cereal harvest depicts a likely improvement in cereal availability in most of southern regions. In the major cereal producing regions of Shabelle and Bay, cereal stocks are expected to extend at least up to the next harvest (July - August 2016). Therefore, cereal prices are likely to decline in most regions of southern Somalia once the harvested cereals start entering into the markets in January-February 2016. However, as harvest is going to be collected intermittently the decline in prices will also be moderate and gradual.

Figure 2: Monthly Trends in Local Cereal Prices



*Good sorghum condition at Galoley, Balad, Middle Shabelle
November 2015*

Currently, cereals are available in most markets due to increased supplies from Gu 2015, recent off-season harvests and release of carry-over stocks by wealthier farmers. As a result, between July and November 2015 maize prices have declined in the riverine markets of Shabelle (39%) and Juba (8%). In November 2015, the lowest maize prices (4 000-7 000 SoSh/ kg) were recorded in the main producing districts of Lower Shabelle (Qoryoley), Lower Juba (Jamame) and Middle Juba (Jilib), while the highest prices were noted in Doble (Lower Juba) (11 000 SoSh/ kg). On the other hand, red sorghum prices decreased in Bakool (18%) in the same period, while white sorghum prices rose in Hiran (21%) and the Northwest (2%). In November 2015, both maize as well as sorghum (white/ red) prices show increases from the levels a year earlier across the country. This is attributable to a combination of factors such as consecutive seasons of below average crop production, trade disruptions due to intensified conflict in southern regions in the current year as well as decline in humanitarian assistance (Figure 2).

LIVESTOCK

As a result of average to below average Karan (July-September) and Deyr rains (September-November 2015), pasture/browse and water condition showed mixed pattern in the northern regions. In most livelihoods of the Northern regions, north, pasture, browse and water are below average to poor due to below average to poor rains. These include large parts of Bari, Nugal, Sanaag, Awdal and Sool regions and entire agro pastoral in Woqooyi Galbed and Awdal regions. On the other hand, off season rains in late October till November 2015, improved rangeland condition of the drought affected livelihood of Guban in Awdal which attracted huge livestock in-migration from the Ethiopian side. Conversely, pasture, browse and water conditions are average to above average in most of Southern and Central regions due to average to above average Deyr rains.



Fully replenished Natural catchment, Hudur District, FSNAU, November 2015

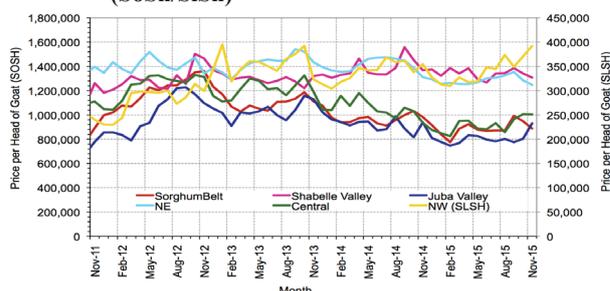
Exceptions are pockets of Gedo and Juba (SIP), along the Coast of Juba and Lower Shabelle and the Coastal line between Xara-dhere and Hoby districts in Central regions. Currently livestock migration is normal in Southern, Central and parts of northern regions, but abnormal mechanized migration, moving from rain deficit areas to other areas that received better rainfall was reported in parts of the North. Livestock body conditions for all species remain normal to above normal (score 3-4) in most of the country as a result of enhanced rangeland conditions. However, field reports indicate below average to average body conditions (PET 2-3) in rain deficit parts of north. Medium cattle calving (August-September), goat/sheep kidding/lambing (October-November) and low to medium camel calving as from November 2015 are reported across the country. This resulted in average milk production in most parts of the country, with the exception of rain deficit areas of north where vegetation condition is below normal to poor.

In post Gu 2015 analysis outcome, livestock holdings and herd sizes among poor households have generally increased across all species (camel, cattle and sheep/goat). Camel holding was either near baseline or above baseline levels across the country. Similarly, sheep and goat holding was near baseline to above baseline, except in Cowpea Belt (Central), Guban Pastoral, Northwest Agropastoral and Coastal Deeh and East Golis of Bari where livestock holding was below baseline. In most of the southern and central regions cattle holding was below baseline except in Juba, Shabelle and Bay/Bakool regions, where it is above baseline and in the Northwest Agropastoral - at baseline levels.

However, over the coming six months (January – June 2016), livestock holding among the poor households in Southern and Central regions will likely increase due to favorable Deyr rains. In the rain deficit areas of north, herd growth will likely decline due to prolonged Hagaa dry season, goat abortion owing to poor feeding and disease, culling and death of goat offspring compounded high off take to cope with the situation

Livestock prices were mostly stable or increased across the country during the July – November 2015 period due to a high demand for all livestock species during the Hajj festival period. However, local quality goat prices exhibited mixed pattern between July-November 2015, mostly increasing in the Northwest, Central and Juba Valley, while remaining stable or showing mild decline in most of the Sorghum Belt, Shabelle and northeast markets. The yearly comparison of livestock prices indicate mild increase Northwest and Central, but mild decline in northeast and most of the Southern markets (Figure 3).

Figure 3: Regional Trends in Local Quality Goat Prices (SoSh/SISh)



MARKETS AND TRADE

During July - November both Somali Shilling (SoSh) and Somaliland Shilling (SISh) remained stable against the United States Dollar to trade respectively at around SoSh 22,375 and SISh 7500 to the USD in Mogadishu and Hargeisa main reference markets. However, in parts of Puntland areas the Somali Shilling depreciated against the US dollar due to the circulation of new bank notes printed by Puntland Authority. Over the last one year both currencies depreciated (4-9%) against the dollar on account of global effect of the strengthening dollar against world currencies as well as increased demand for dollar for transactions.

Market condition continued to be stable with normal supply of food items. Apart from the Juba market catchment, prices of red rice, sugar, diesel, vegetable oil and wheat flour have remained stable or slightly decreased between July and November 2015. Diesel prices recorded the largest decline (4-15%) in most regions. In the Juba valley zone, ongoing moderate to heavy rains have disrupted transport on dilapidated road networks. Compared to one year ago, the prices of most of these imported items indicate moderate decreases (5-15%) in many markets that use the Somali shilling mainly due to favorable global market prices. In the Somaliland shilling markets of the Northwest, prices of the above mentioned imported items were relatively stable in November 2015 compared to November 2014. International market dynamics combined with stable shillings, on ongoing El Nino rains and decreases in fuel are the main underlying factors shaping price patterns in the reporting period. In the port markets of Berbera, Bossaso and Mogadishu, price movements for most imported commodities have, by and large, continued to follow international price trends.

The supply of local cereals from the southern regions to the Central and North declined due to the current rains that hindered movement of trade goods and people leading to slight increase in price of sorghum and maize. In addition cross border movement of goods with Kenya and Ethiopia have been affected by the Deyr (Oct- Dec) rains.

Between July and November 2015, the Consumer Price Index (CPI), measured through percentage changes in the cost of the Minimum Expenditure Basket (MEB), rose by 9 percent in urban markets using the SISh currencies. This is due reduced cereal stocks available for poor households, as a result of crop failure during Gu 2015 season. The cost of food and non-food items in the minimum expenditure basket is stable in the SoSh using areas. However, over the past one year the cost of the minimum expenditure basket decreased significantly in the south and central Somalia (15-31%) due to reduced prices of items in the basket such as sorghum, wheat flour and milk.

NUTRITION

Findings of *Deyr* 2015 season nutrition assessment among 13 IDP settlements across Somalia indicate an improvement in nutrition situation among IDPs in Dhobley and Baidoa, while rapid deterioration was noted among Bossaso IDPs (12.5 % to 16.8 %) in Northeast region. **Critical** levels of Global Acute Malnutrition (GAM rate $\geq 15\%$) were observed among four out of 13 IDP settlements surveyed during *Deyr* 2015 assessment. These are Dolow IDPs in Gedo (South), Bossaso, Garowe and Galkayo IDPs in Northeast.

It is a public health concern that nutrition situation in three of these IDPs (Dolow, Garowe & Galkayo) is sustained as **Critical** in over the last two yrs. **Serious** GAM levels (≥ 10 and $< 15\%$) were recorded among IDPs in Mogadishu, Kismayo, Dhobley, Baidoa and Dhusamareb in South Central region, Qardho in Northeast region and Hargeisa IDPs in Northwest. **Alert** levels of (GAM rate $\geq 5\%$ and $< 10\%$) were seen only in Northwest among Burao and Berbera IDPs. Despite continued support interventions, relatively high morbidity incidences and low immunization coverage remain major contributing factors of acute malnutrition as reported in nearly two thirds of the assessed camps. Over the past six months, a 14 per cent decline was reported in the number of caseloads prevalence. Approximately 16500 under-five children were found to be acutely malnourished with majority (57 percent) located in Mogadishu IDP settlements (Figure 5).

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

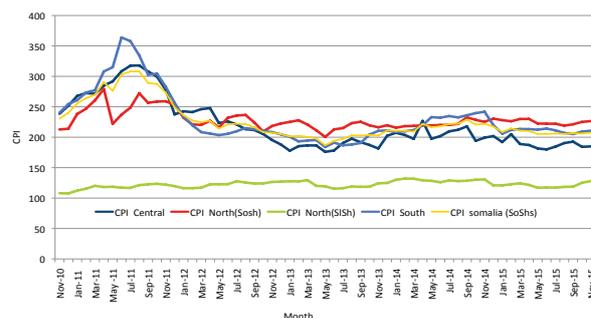
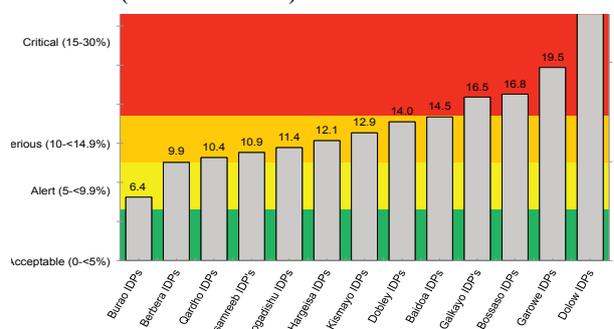


Figure 5: Prevalence of Global Acute Malnutrition (GAM) in the main IDP settlements across Somalia (November 2015)



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

According to FSNAU Post-Gu 2015 analysis most urban populations across Somalia were projected to face Minimal or Stressed acute food insecurity (IPC Phases 1 or 2) with the exception of urban areas in the southern Somalia that have been affected by continued trade disruptions due to insurgent activities (Hudur and Wajid in Bakool Region and Buloburto in Hiran Region) which were projected to face acute food security Crisis (IPC Phase 3) through the end of the year.

Cost of living i.e. cost of the Minimum Expenditure Basket (MEB) and purchasing power (measured through terms of trade [ToT] between labour wage and cereals) were among the major determining factors of the food security situation of urban populations due to their high market-dependency. Insecurity and a lack of humanitarian access have also contributed to food security conditions in the post-Gu 2015 period, particularly in the regions of Bakool and Hiran where population affected by trade disruptions were classified under acute food security Crisis (IPC Phase 3). Recently emerged conflicts in Galkacyo town, which have caused massive displacements and disrupted urban livelihood activities are of great concern and will likely have negative impact on food security situation of the population.

The MEB cost in local currency terms between July and November 2015 in the regions of Northeast, Northwest (W/galbeed), part of central (Mudug), Lower Shabelle and Sorghum belt regions indicated mild increases. Conversely, mild decreases were recorded in regions of Juba, Middle Shabelle, Banadir, Bakool and Galgaduud. A moderate increase in MEB was noted in Awdal due to significant (61%) increase in red sorghum prices. Compared to a year ago (November 2014), the MEB cost is lower in Woqooyi Galbeed, Galgaduud and most southern regions due to decline in cereal prices which comprise of a larger portion of the basket; while it has remained relatively stable in Mudug and most of the northern regions. In November 2015, the highest MEB cost in dollar terms was recorded in Sanag (USD 209), while the lowest was reported in Bay (USD 81). This is due to higher red Sorghum price in Sanaag (consumption market) than Bay sorghum producing regions, while exchange rate is about the same.

Casual labour, which is characterised by very low and irregular wages due to seasonal variation, constitutes a critical source of income for poor households in urban areas. In the period July-November 2015, the wage rates for casual labour showed mild to moderate increasing trends across the country, except in Middle Juba where the rates declined by 11 percent due to relatively limited job opportunities (under insurgent control). The highest increase was recorded in Mogadishu Bakar market (29%), followed by Bakool (El-Berde & Hudur 23%), Shabelle valley (21% in Lower Shabelle and 18% in Middle Shabelle). This increase could be attributed to increased seasonal agricultural labour opportunities and other activities like constructions of roads and buildings. Compared to a year ago (November 2014), labour wages showed stable trends in Northeast, Banadir and Sorghum belt (Bay, Gedo, Hiran) while the remaining regions recorded moderate to high increases with the highest increase of 48 percent recorded in Bakool (El-Berde & Hudur) due to increased labour opportunities as a result of increased constructions (government offices, schools etc and other private business) and improved porter wages obtained from food aid provisions, due to better access in the month of November particularly in Hudur town.

The purchasing power (ToT between casual labour wage and most commonly consumed cereals) increased by 2-7 kgs of cereals per daily wage or remained relatively stable over the past five months in most parts of the country with the highest increase recorded in Mogadishu Bakara (7Kg/daily labour wage). This trend was attributable to increases in labour wage rates and/or declines in local cereal prices. Similarly, compared to a year ago (November 2014), ToT remained relatively stable or increased (1-5Kg/daily labour wage) in most regions. However, the largest annual increase (5 kg/daily wage) was noted in Shabelle regions, mainly due to a major (38% Middle Shabelle & 27% Lower Shabelle) decline in cereal prices and moderate (18% in Middle Shabelle & 11% Lower Shabelle) increase in daily labour wage rate. ToT in Gedo region exceptionally exhibited slim decline, due to increased (6%) cereal prices. In November 2015, the highest ToT (19 kg/daily wage) was recorded in Bay and the lowest (5kg/daily wage) was in Central (Figures 6 and 7).

Figure 6: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (South)

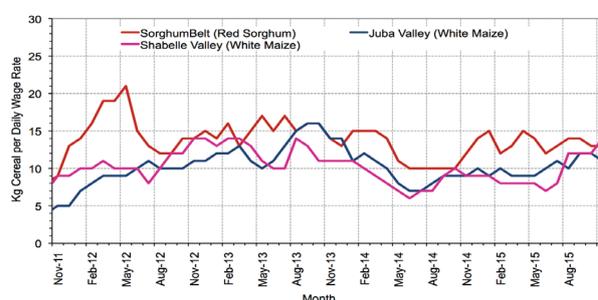
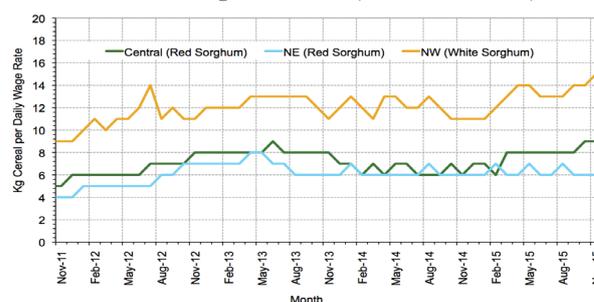


Figure 7: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (North & Central)



Northern regions

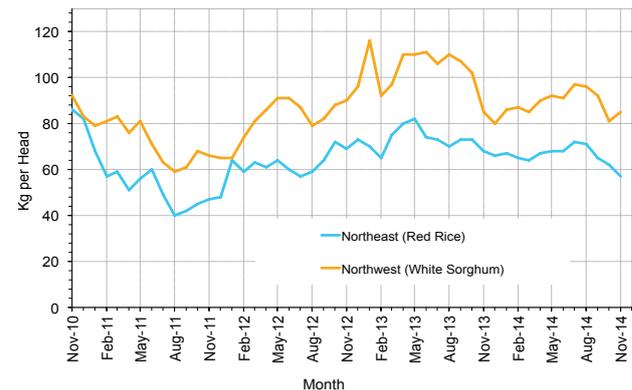
For the post- Gu 2015 (August - December 2015) most likely scenario, the food security projection for northern rural livelihoods has been classified as Minimal (IPC Phase1) for Hawd, West Golis and Northern Inland Pastoral (NIP) livelihoods; Stressed (IPC Phase 2) for Togdheer Agropastoral, Coastal Deeh and East Golis Pastoral; and Crisis (IPC Phase 3) in the drought affected Guban Pastoral and Northwest Agropastoral livelihoods. In the post-Gu 2015, the food security situation in most pastoral livelihoods of the Northern regions has either remained stable or improved owing to average milk availability for consumption (medium kidding and low camel calving rates in Gu 2015), improved purchasing power of pastoralists as well as humanitarian interventions.

As a result of average to below average *Karan* (July-September) followed by average to below average September-November *Deyr* rains, pasture/browse and water condition showed mixed pattern in the northern regions. In most of the livelihoods of north, pasture, browse and water conditions are poor. These include the Northern Inland Pastoral (NIP) which is the largest livelihood zone in Bari, Nugal, Sanag and North of Sool regions, Coastal Deeh pastoral of Iskushuban, localized areas of East Golis, Hawd and agropastoral of Togdher, and large parts of agro pastoral in the northwest regions. However, other livelihoods in the north, pasture browse and water availability are average due to near average rains. On the other hand, unseasonal rains in late October to November 2015 improved rangeland condition in drought affected Guban pastoral livelihood in Awdal which attracted huge livestock influx from the Ethiopian side. Abnormal livestock migration from rain deficit areas of NIP of Bari, Nugal and Sanag regions to Hawd of Nugal and Sool region, atypical in- migrations from Ethiopia to Guban of Awdal region and from Guban pastoral of Berbera to Hawd of Togdheer were reported. As a result of overgrazing by the huge livestock concentration in areas that received better rainfall early pasture and water depletion is likely to happen. Due to migration options, generally livestock body conditions of all livestock species are average to near average (PET score of 3) in most pastoral livelihoods. Exceptions are animals left in rain deficit areas and those lactating where body condition is below average to poor with PET score 2-1. Medium to low calving for camel and cattle and medium kidding of goats are reported in most regions. Goats kidded in September to October, while camel calving started in November, 2015. In the rain deficit areas, herd growth and milk production are not promising due to prolonged Hagaa, goat abortion owing to poor feeding and disease, culling and death of offspring compounded high off take.

According to the recent FSNAU/ Ministry of Agriculture Gu-Karan crop assessment (November 2015) carried out in the Northwest Agropastoral (Hargeisa, Gebiley, Baki, Borama districts) about 7 700 tonnes of cereals mainly sorghum were collected in this livelihood. These estimates are lower (30%) compared to the FSNAU projections made in July 2015, which is attributable to poor performance of *Karan* rains in agriculture areas that resulted in lower planted area and cereal yield. Similarly, Gu-Karan 2015 production is significantly lower (by 87%) compared to last five years PET average (2010-2014) and is the lowest harvest season in Northwest regions over a decade.

The Terms of Trade (ToT) between goat and rice exhibited mixed trends over the last five months (July-November 2015). In the Northeast, ToT declined from 87kg to 83 kg/head as a result of local quality goat price decrease (8%). In the Northwest, ToT rose significantly from 63 to 98 kg/head in Awdal region due to high goat prices as supply reduced because of the drought in Guban. ToT decreased moderately from 78 to 66 kg/head in Woqooyi Galbeed following seasonal pattern. Yearly comparisons indicate a mild increase (1%) in the Northeast and an increase (18%) in the Northwest. In November 2015, the highest ToT (109kg/ head) was recorded in Bossaso market and the lowest (48 kg/ head) was reported in Erigavo market (Northeast) [Figure 8].

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



Out-migration from NIP of Bari to Nugal Region, FSNAU, November 2015

Central regions

Post Gu 2015 most likely scenario (August-December 2015), most of the rural livelihoods of Central regions (Hawd, Addun, Cowpea Belt and Coastal Deeh) livelihood zones were classified as Stressed (IPC Phase 2), with the exception of the Hawd, Addun pastoral livelihoods of Mudug region and Southern Inland Pastoral (SIP) of Galgadud Region that have been classified as Minimal (IPC Phase 1). The improvement of food security situation in most livelihoods of the central regions is attributed to increased availability of own production (milk and meat) as well as declined prices of imported foods (rice).

Average to above average Deyr rains in October-November, 2015 have improved water and pasture conditions in rural livelihoods of central regions (Cowpea Belt, Coastal Deeh, Hawd and Addun). However, late start with below average precipitation has been reported in parts of Coastal Deeh (mainly Haradhere and Hobyo districts). The livestock migration pattern is normal in all livelihoods of the Central regions. Livestock body condition is largely normal in most livelihoods (PET score 3) further improvement of the livestock body condition is expected due to better migration options. Conception rates of camel and sheep/goats were medium during the Deyr 2014 and Gu 2015 seasons. Medium kidding/ lambing of goats and sheep and low camel calving but improving during the Deyr and Jilal season, is expected to improve milk availability in most of the central livelihoods over the coming six months. In November 2015, the price of the camel milk marginally increased by four percent compared to July 2015 due to low camel birth. As a result of good Deyr rains in the Cowpea Belt livelihood, the cowpea crop generally performed well and production is expected to be average in most districts. In a normal season, cowpea stocks of poor households last for up to 3-4 months. Sorghum has also performed well during the Deyr growing season, although this crop is marginal for the Cowpea Belt livelihood.

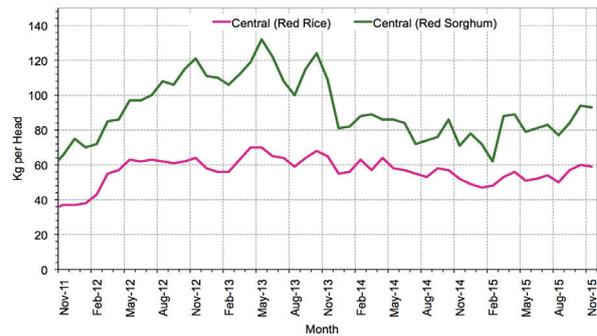
The ToT between local quality goat and cereals (rice) rose over the last five months (July-November 2015) in all markets of the central regions. The increase was mostly driven by local quality goat price increase due to improved livestock body condition. In November 2015, the highest ToT (76 kg of rice/head) was recorded in Galkayo market and the lowest (45-51 Kg of rice/head) was in Dhusamareb and Eldher districts. The low rates in the mentioned districts are due to prevailing insecurity and poor road access (mostly sand dunes). On an annual basis, the ToT rose by 13 percent, on average, in central regions. The biggest annual growth in the ToT (31% - 12kg) was recorded in Eldher market, which was driven mainly by decline in rice prices by 18 percent and rise in goat price by 9 percent (Figure 9).

Southern rural

In the post-Gu 2015 (August-December 2015), the food security situation in most rural livelihoods of southern regions is classified as Minimal (IPC Phase 1) or Stressed (IPC Phase 2) with the exception Riverine Gravity Irrigation livelihood zone of Middle Shabelle Region that has been categorized as facing acute food security Crisis (IPC Phase 3) through the end of 2015. The projections for IPC classification were based on the assumptions of average and above average Deyr 2015 rains, off-season crop harvest being likely to be affected by El-Nino induced heavy rains and flooding and Deyr farming activities, improved livestock production and cereal stock availability at household level in some of the farming areas.

For the year ending 2015, cereal stocks of poor households have been exhausted in most riverine/ agropastoral areas of southern regions. The exceptions are few livelihood of the major cereal producing regions of Lower Shabelle and Bay where minimal cereal stocks are still available among the poor farmers in November 2015. Relatively good seasonal performance of Deyr rains, early agricultural activities and humanitarian interventions in support of farming inputs (seeds, tractor hours, canal and catchment rehabilitations) have created job opportunities for poor households for seasonal farming activities. Furthermore, El Niño rains which was predicted during post-Gu 2015 analysis (see Post-Gu 2015 Food security and Nutrition Technical report) to bring heavier rain than normal and floods to riverine areas in Shabelle and Juba did not happen, which moderated the risk of increased food insecurity in riverine livelihoods. The current outlook suggests average to above average Deyr 2015/16 crop production in most regions, with the exception of the rain-deficit areas of Lower Shabelle (maize rain-fed), parts of riverine, Juba valley and the flood-affected areas of Middle Shabelle region (Jowhar riverine). The impact of harvest losses on food access of poor farmers in flood prone areas is expected to be low as many

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



Improved Pasture and Body condition, Hawd, Abdud-waq District, Galgadud FSNAU, November 2015

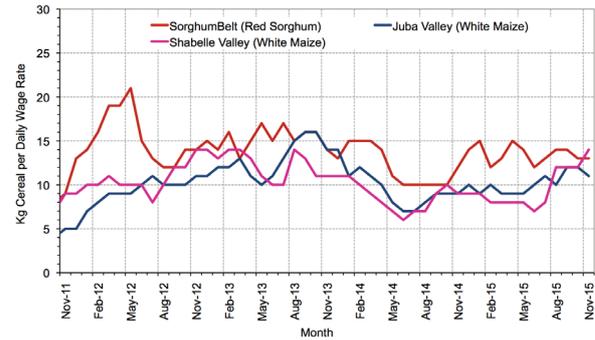
farmers have already started flood recession cultivation due to decline of river level in Shabelle. In addition, a limited off-season harvest expected by March-April 2016 in the riverine areas of Lower Juba, Middle Juba, Middle Shabelle and Gedo (see Agriculture Sector) will likely mitigate food shortages among poor households. Based on the current outlook of the Deyr harvest, cereal prices are likely to follow a seasonal pattern in decline trend. The cereal price decline is expected from December when wealthier farmers start releasing Gu carry-over stocks to the market.

The Deyr 2015/16 rains have improved pasture conditions, replenished water catchments and contributed to improved livestock body conditions in most areas. Milk availability is average as a result of average cattle calving that started in August. The milk yield of lactating camel has also improved as a result of improved pasture, while more camel calving is expected from November onwards, which will further increase milk availability and access. During this Deyr season, the conception rates among sheep, goats and cattle were medium to high in most parts of the region, but they were low to medium for camel. The kidding/lambing among small ruminants is expected by late February / early March 2016, while cattle-calving is expected by June 2016. Hence, livestock herd size, particularly small ruminants, will likely to remain above baseline levels in most pastoral livelihoods.

Increased agricultural activities have created job opportunities for poor households in riverine and agropastoral areas of southern Somalia. As a result, the purchasing power of poor households measured through TOT between daily labour wage rate and cereal prices increased in November compared to July 2015 in Shabelle valley, Juba valley and Sorghum Belt. The ToT between daily labour wage and cereals increased by 67 percent in the Shabelle valley, due to cereal price declines and increased wage rates during the Deyr growing season. In Juba valley and sorghum belt regions, the ToT ratio has increased 33 and 18 percent, respectively. However, the highest ToT was recorded in Bay (21kg/wage) and Bakool (17kg/wage), while the lowest ToT was in Gedo (9kg/wage) as of November 2015. Annual comparisons indicate higher ToT levels in November 2015 compared to the levels in November 2014 across the Sorghum Belt regions, with the biggest climb in Bakool (55%) due to increased production and trade activities on the ground of improved security conditions and good rainfall in this season. In Shabelle and Juba regions, the ToT ranged between ten and twelve kg of maize/ daily wage rate, indicating 25 and 200 percent increase respectively since November 2014. However, the ToT remained stable in Gedo region on an annual basis.

In the rural markets, the ToT between local quality goat and local cereals (sorghum/ maize) increased across the southern regions during the July-November 2015 period, mostly reflecting increases in local quality goat prices and declines in local cereal costs (Figure 10).

Figure 10: Regional Trend in Terms of Trade: Labour to Cereals (South)



Crop weeding in Agropastoral area at Beletwein, Hiran, November 2015

Recent publications and releases

- *Consumer Price Index study Report, December 2015*
- *Nutrition Update, November 2015*
- *FSNAU Somalia Cereal Market Integration Report, November 2015*
- *FSNAU Climate Update, October 2015*
- *FSNAU Market Data Update, October 2015*
- *FSNAU Post Gu 2015 Food Security and Nutrition Technical Report, October, 2015*
- *FSNAU Post Gu 2015 Nutrition Technical Report, October 2015*
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NOTE: The above publications and releases are available on the FSNAU website: www.fsnau.org