

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

Integrated
Food Security
Analysis

FSNAU - Somalia

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KEY FINDINGS

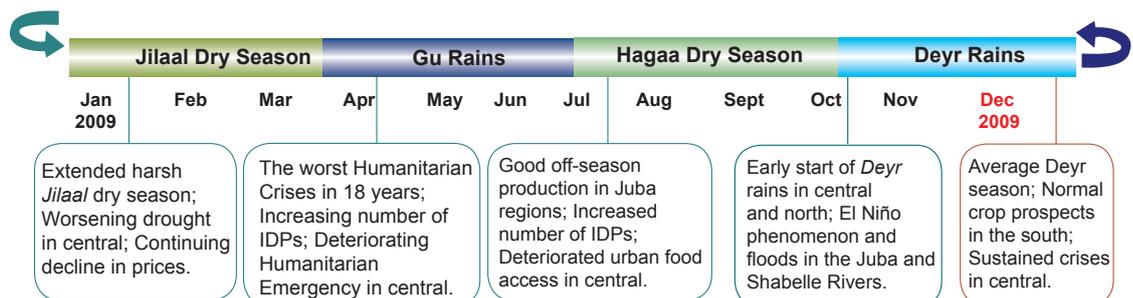
There are signs of improvement in the overall food security situation in most livelihoods of Somalia, as a result of near normal crop performance, good pasture/browse conditions and improved water availability following average and above average *Deyr* '09 rains. The post-*Deyr* seasonal outlook is favourable in most agropastoral and riverine areas of Somalia. Cereal production is expected to be near normal in southern Somalia, as well as in the Cowpea Belt in southern and central parts of the country. The harvest in the northwest agropastoral areas is also likely to exceed the previously forecasted below average levels. Flash floods occurred in localised areas of southern Somalia during this *Deyr* season resulting in temporary displacements and minor damage to crops and other property. However, the negative impact of these floods was not significant, while in some areas, the heavy rains even increased the demand for labour and contributed to improved labour wage rates.

Livestock conditions, trade and prices have all shown improvement. Labour opportunities have improved, while cereal prices decreased in most areas, which led to improvements in the terms of trade and purchasing power of populations in most livelihoods. The value of the Somali Shilling showed signs of strengthening although depreciation still remains high compared to pre-inflation levels. Significantly, civil security has further deteriorated in most areas of southern and central Somalia triggering population displacement, restricting movement of people and goods and hampering a provision of humanitarian aid. Recent nutritional surveys indicate a sustained Nutritional Crisis in the Central zone and Hiran region, highlighting the need for on-going humanitarian interventions.

Key Issues and Early Warning for January to June 2010

- **Expected Near Normal Crop Production to Improve Food Access in the South.** There are indications that cereal production will be near normal in most of southern Somalia, as a result of near normal crop establishment. Exceptions include Kismayo and Afmadow district of Lower Juba as well as parts of Hiran and Bakool regions where crop establishments were poor due to various natural and man-made hazards (civil insecurity, below average rainfall, etc.). Additionally, the total cultivated area under all crops has also increased. Due to the good off-season production and promising *Deyr* season, market supplies of cereals have increased, leading to cereal price declines in most areas.

Market supplies of cereals in the south are expected to continue to increase during the post-*Deyr* season, with the exception of agropastoral areas of Lower Juba, Gedo, Bakool and parts of Middle Shabelle. The areas with decreasing cereal supplies have low cereal stocks from the poor *Gu* '09 season and will likely experience disruptions to market activities as they are highly insecure. Income opportunities and wage rates have improved due to intensified agricultural activities, which have led to improvements in the terms of trade and purchasing power of the population in the south except for Sorghum Belt areas (excluding Bay). The total number of people in crisis in the south is expected to decline.



Somalia Seasonal Timeline & Key Events

- **Sustained Humanitarian Emergency in Central and Hiran Regions.**

Deyr rains were below normal in Hawd and Addun pastoral areas in Hiran and Galgadud, which resulted in the worst pasture and water conditions in Somalia. The vegetation conditions were also poor in parts of Coastal Deeh of Galgadud as well as parts of agropastoral areas of Hiran (Jalalaqsi and Bulu-Burti districts). These areas have experienced a sixth consecutive season of the drought.

The situation has begun to improve in some parts of Hiran agropastoral as well as the Cowpea Belt of central Somalia due to average rainfall that led to near normal crop performance. However, considering that the areas have been under drought for five consecutive seasons, these improvements will not translate into immediate recovery. The population is highly indebted and social support systems are overburdened. The regions have experienced large population displacements because of drought compounded by civil insecurity, with some groups becoming destitute and moving towards urban areas in search of social support and labour. Therefore, the population in these areas will continue to be in crisis, and it will take several average seasons for livelihoods to recover.

- **Receding Drought and Signs of Improvement in the North**

In the North, rains were of fair intensity with wide distribution in the emerging drought areas in Sool Plateau of Sool and Sanaag regions. The rainfall was average in most parts of the north and livestock started to recover in Sool, eastern Sanaag and parts of Nugal regions. Water trucking has discontinued and water prices have declined. In the areas that received average rainfall, camel conception started at a low rate and is expected to increase in Dec. '09. However, livestock production and reproduction are very low due to poor conception rate during the past *Jillaal* and *Gu* '09, as well as livestock diseases during *Hagaa* '09 that resulted in death and abortion of camel and goats. The lifting of the livestock export ban is going to contribute to increased livestock sales as well as labour opportunities because of more export demand through Berbera and Bossaso ports.

- **Falling Prices and Improving Urban Food Security**

The recent urban food security analysis indicated improving food access by the urban population since June '09 due to reduced cereal prices and increased ability to cover the Cost of Minimum Expenditure Basket (CMB). The average *Deyr* 09/10 season is going to improve local cereal production, which shall lead to improved stock availability, further decline in cereal prices, increased social support to the poor, and, consequently, reduced CMB. Compared to October of last year, CMB has already shown a remarkable decline, in the range of 9-30%, in all areas, indicating reduced inflationary impact. Also, the value of the SoSh has increased since last year, mostly due to increased livestock exports. Import commodity prices are likely to decline with the increased supplies as a result of improved export earnings following the removal of the Somali livestock trade restrictions by Saudi Arabia. However, these positive signs of improvements may be less apparent in the presence of IDP competition for labour opportunities and social support.

- **Growing Number of IDPs and Reduced Humanitarian Support**

The number of IDPs is increasing primarily due to the increasing civil insecurity in southern and central Somalia. Drought has contributed to the worsening situation of IDPs in central regions. The total number of IDPs increased by 63,000 in the last three months alone, with over 40 percent of the displaced from Mogadishu. In recent months the number of insecurity epicentres, previously mostly confined to areas in and around Mogadishu, has spread into different parts of the country. These incidents caused human casualties, persistent human harassment, frequent road blocks, limited trading activities, as well as restricted movement of population and goods. Due to the uncertainty of the political situation, further population movements could be expected over the months to come. The situation is expected to worsen given reduced humanitarian interventions and growing resentment against the IDP population, especially in Puntland. FSNAU will conduct an emergency IDP impact survey as part of the upcoming post *Deyr* assessment.

SECTOR HIGHLIGHTS

CLIMATE

Rainfall performance

The *Deyr* rainfall distribution, both in time and space, varied across the regions and livelihoods of Somalia. In northern and central parts of the country, rains started in late September and continued up to mid-October, while no rainfall was recorded in November. Most southern regions, on the other hand, remained dry in September, while the rains were continuous and widespread in October and ceased in early November in most livelihood zones. Field reports, however, indicate that the rains have since resumed in parts of the south from the beginning of December.

In the north, rains were of fair intensity (25-75mm) with wide distribution in Golis Guban, parts of Sanaag and Nugal and moderate distribution in the Hawd livelihood zone. However, very poor rains fell in most parts of the Coastal Deeh, parts of Dharoor and Gagaab, as well as the Addun of Jariban district (Mudug region). Compared to the long term mean (LTM) the rainfall was average in most areas of the north, while only 20-60% of normal in most of the Coastal Deeh, the Hawd of Toghdeer and parts of Sanaag region (Map1). *Hays* rains are still expected to fall along the coastal beltline in December.

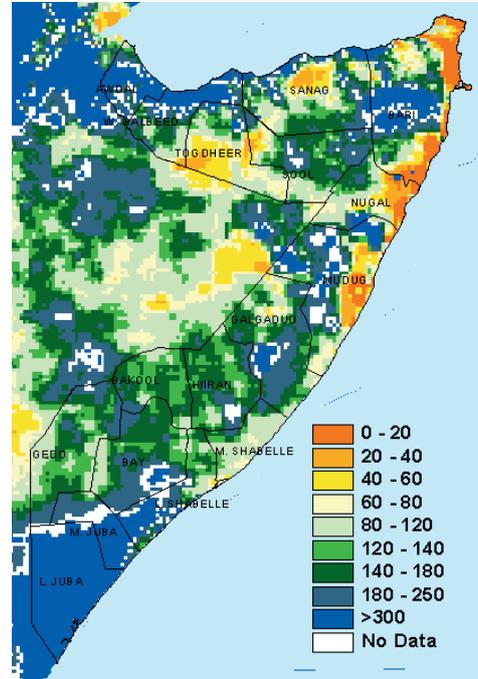
Deyr '09 season had a mixed performance in the drought-affected central regions of Galgaduud and Mudug. Normal to near normal rains were received in the Cowpea Belt, localized parts of the Addun pastoral and parts of the Coastal Deeh. However, rains were extremely poor in Adado, Dhusamareb and Abudwak districts, pockets of the Cowpea Belt and parts of the Coastal Deeh. A comparison between actual (Oct-Nov. '09) and normal (LTM) rainfall data indicates normal to above normal rains in the rest of central Somalia. For example, rain gauge data from Bulu-Burti and Beletweyne stations recorded 153mm and 271mm of rains in October, which are 177% and 300% of October LTM, respectively. However, rainfall was below the LTM in both areas during November (43% of LTM in Bulu-Burti and 63% of LTM in Beletweyne).

In the south, most areas experienced normal to above normal rains with the exception of northern parts of Hawd Pastoral in Hiran, southern parts of agropastoral and riverine areas of Bulu-Burti and Jalalaqsi (Hiran), parts of Elberde (Bakool) and southern Garbaharey (Gedo). *Deyr* rains were very poor in these areas throughout the season. During Oct-Nov., torrential rains causing moderate flash floods were reported in parts of Hiran, Gedo, Shabelle and Juba regions. However, the expectation that the El-Niño phenomenon would result in very heavy *Deyr* rains and extensive floods has not materialised.

Vegetation Conditions

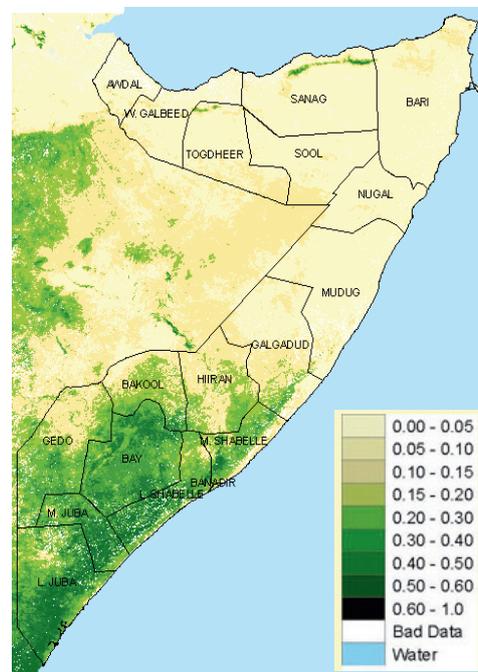
The *Deyr* season has been characterised by relatively good vegetation conditions as a result of the Sept.-Nov. rains. Normalized Difference Vegetation Index (NDVI) for the first dekad of December indicates good vegetation conditions in most parts of the south and central regions with the exception of the agropastoral livelihoods of Bakool, Gedo, Hiran as well as the Coastal Deeh of Middle Shabelle and Galgaduud. In the north, normal vegetation is observed in Golis Guban, parts of Sanaag and Nugal regions while livelihood zones of Kakaar-Dharor Pastoral in Saanag as well as West Golis Pastoral of Togdheer show slightly better pasture conditions than the surrounding livelihoods (Map 2).

Map 1: Percent of Normal Rainfall (Sep. 3rd dekad - Dec. 1st dekad, '09)



Source: NOAA

Map 2: NDVI 1st dekad of Dec.



Source: JRC/MARS FOOD

SOMALIA: FLOODS DEYR '09/10

During Oct-Nov. '09, southern Somalia experienced flash flooding in the Juba and Shabelle river catchment areas due to the excess rains. The rains were brought by the presence of a weak El-Nino phenomenon in the Horn of Africa over the current short rainy season, or *Deyr* (from Sep.- Dec. 2009), which was confirmed by the IGAD Climate Prediction and Applications Centre (ICPAC).¹ The flash floods caused temporary displacements and minor damage to crops and other property in localised areas of southern Somalia. However, the impact of the floods was not significant.

In October 2009, FSNAU, FEWSNET, AND SWALIM, collaborated to form the Flood Information Group, in order to verify and consolidate real-time flood information, as well as to assess flood impacts. SWALIM (Somali Water and Land Information Management) has been providing flood warning levels through its weekly and monthly flood situation updates to the Somali interagency response group. Information and updates can be found on the SWALIM flood information website (<http://www.faoswalim.org/subsites/frmis/index.php>).

Deyr rains began in the second half of September in the northern and central parts of Somalia, while widespread rains over the Juba and Shabelle river catchment areas began only by the second week of October. High levels of rainfall received in the Ethiopian highlands during the same period translated into high water levels on the two rivers in late October and early November. The risk of river flooding remained minimal at the start of October, increasing to moderate risk towards the end of the month.

Considering the weak river embankments and river breakages there were concerns over the extent of possible inundation. Nevertheless, river levels remained within the river banks throughout the season. However, during the end of October and beginning of November, heavy localised rains resulted in flash flooding² in 11 districts in Hiran, Shabelle and Juba regions, as well as Gedo regions. This information was confirmed by the Flood Information Group.

River Basins	Region/District	Number of Displaced Population Since Oct. '09	Effects of floods
Shabelle River Basin 14,320 displaced	Hiran Region	13,000	
	Belet Weyne/Matabaan	13,000	Displacement; Flooded farms, crops destroyed; Latrines collapsed
	Bulo Burti/Maxaas	-	Displacement
	Jalalaqsi		Flooded crop fields
	Middle Shabelle Region	120	
	Jowhar/Mahadey		Flooded crop fields
	Balcad/Warsheikh	120	Displacement; Flooded crop fields
	Lower Shabelle Region	1,200	
	Marka		Flooded crop fields, crops destroyed
	Qoryooley	300	Displacement; Flooded crop fields
	Kurtunwaarey		Flooded crop fields, crops destroyed
	Wanlaweyne	900	Displacement; Flooded crop fields crops destroyed
	Sablale		Flooded crop fields, crops destroyed
Brava		Flooded crop fields, crops destroyed	
Juba River Basin 2,990 displaced	Gedo Region	2,100	
	Ceel Waq	2,100	Displacement
	Middle Juba Region	890	
	Jilib	850	Displacement; Flooded crop fields, crops destroyed
	Buale	40	Displacement; Flooded crop fields, crops destroyed
	Sakow/Salagle		
	Lower Juba Region	0	
	Jamame		Flooded crop fields, crops destroyed
Kismayo		Flooded crop fields, crops destroyed	
TOTAL	17,310		

The main consequences of these flash floods included population displacement, flooded crop fields, and damaged crops. The scale of displacement was minimal compared to the floods of 2006, totalling 17,310 people across the regions. Displacement occurred in 7 out of 11 flooded districts, with Beletweyne (Hiran) accounting for about 75% of the total displaced population.

Despite strong expectations of a good rainy season, a long dry spell began in mid-Nov. throughout the country, and has continued in some parts (southern Hiran and much of central Somalia). The withdrawal of rain producing climate systems has consequently suppressed rains with only light showers being reported in some parts of the Juba and Shabelle basins in Somalia in late November.³ Due to the prevailing dry conditions and considering that no major river floods are expected, displaced populations have returned to their homes as waters have receded.

1 El Niño events, or El Niño Southern Oscillation (ENSO), are measured by above average sea surface temperatures in the equatorial Pacific.

2 Flooding that develops very quickly on streams and river tributaries

3 Systems responsible for producing the rainfall (e.g. winds, pressure, etc.)

CIVIL INSECURITY

The civil security situation has further deteriorated in most areas of southern and central Somalia. Militia regrouping, sporadic fighting and confrontations have commonly increased, as well as the number of insecurity epicenters. During the last two months insecurity incidents were reported in Mogadishu, Bosaso (Bari), Galkacyo (Mudug), Balcad (Middle Shabelle), Rabdhuurre (Bakool), Afmadow and Kismayo (Lower Juba). These incidents caused human casualties, persistent human harassment, frequent road blocks, limited trading activities, as well as restricted movement of population and goods.

Most recently notable increases in militia activity were reported in the areas of Afmadow (Lower Juba), Beletweyne (Hiran), Balad (M. Shabelle), Elbarde, Rabdhuurre and Xudur (Bakool), Guriceel (Galgadud) and Mogadishu. Resource based conflict and clan retaliation have reportedly reduced. However, clan tensions remain high in the north (Gabiley and Borama districts of W. Galbeed and Awdal regions) although without hindering humanitarian operations. Most recently several bomb blasts were reported in Bossaso in the northeast targeting local authorities. However, so far nobody has claimed the responsibility.

Piracy incidents have continued in the reporting period despite the counter attacks and arrests of nearly hundred of pirates by multinational (25 countries) forces. Reportedly, 26 ships were attacked by the pirates in the period between June – Nov. '09. Out of the total of 12 hijacked ships 2 vessels with 59 crew members were released after paying ransom.

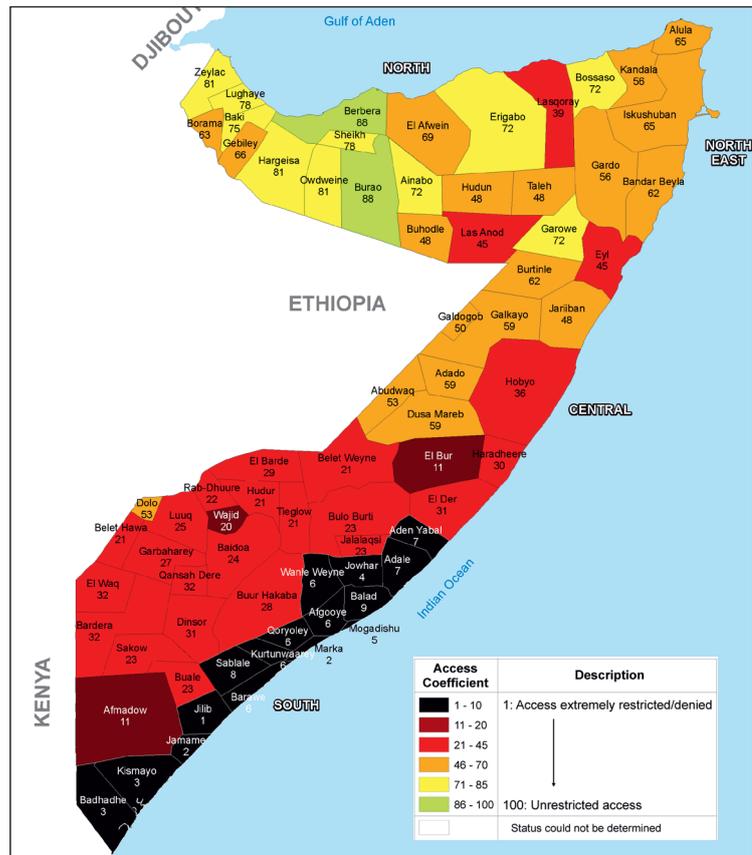
About two-thirds of Somali districts have highest level of humanitarian inaccessibility, which complicates a provision of aid and support to the needy (Map 3). No abductions or killings of humanitarian staff are reported since September, which is attributable to the very limited presence of humanitarian staff in the south and central Somalia. However, 10 aid workers abducted in 2008 are still held in captivity in Somalia (Figure 1).

Population Displacement

According to the latest update (Dec. 2009) on UNHCR's population movement tracking system, around 63,000 people got displaced throughout the country since early September. About forty-three percent (27,000) of the displaced originate from Mogadishu, of which one-fifth is displaced within the city. Other key areas of displacement are Galgaduud, Juba and Lower Shabelle. The main areas absorbing these fresh displacements are Ceelasha and Mogadishu areas, Galkayo and Bosasso of Puntland, as well as Ceelbuur and Dhusamareeb of Galgaduud region.

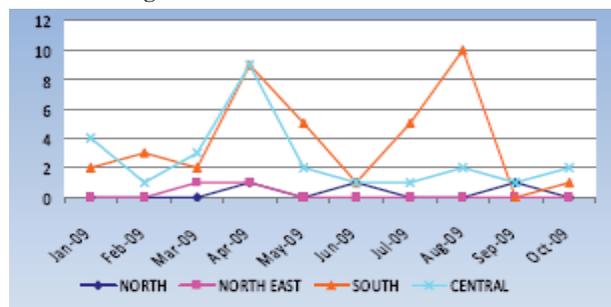
Over three-quarters of cases of displacement are due to insecurity and drought, with civil insecurity being the main cause of displacement (63% of cases). Other causes of displacement include loss of livelihoods (6.6%) and floods (5.7%), particularly in the riverine parts of Hiran and Juba regions. Additionally, there is a growing resentment of local population in Puntland against the IDPs from southern Somalia due to the above-mentioned recent incidents in Bossaso. This may lead to further population movements of IDPs from Puntland back to southern and central Somalia. Due to the uncertainty of the political situation, further fresh population movements could also be expected over the months to come.

Map 3: Somalia Humanitarian Access Map Oct. 2009



OCHA Somalia - Humanitarian Access Update (October '09)

Figure 1: Direct Humanitarian Incidents by Month per Region



Source: OCHA Somalia - Humanitarian Access Update (October '09).

AGRICULTURE

Crop Establishment and Production

Overall crop establishment in this *Deyr* season was near normal in most areas of southern and central Somalia, including Juba, Bay, Gedo, Shabelle, parts of Bakool and Hiran, as well as the Cowpea Belt of Middle Shabelle, Galgaduud and Mudug. Conversely, poor crop establishment was reported in parts of Bulo-Burti and Jalalaqsi (Hiran), as well as Kismayo and Afmadow (Lower Juba) due to below average rainfall, flash floods, weed infestation (parts of Hiran and Lower Juba) as well as a poor civil security situation (particularly Lower Juba). Most regions experienced a long dry spell of nearly 30 days during November, which raised concerns that crop performance could be affected if the dry conditions continued until the end of *Deyr* season. However, in the beginning of December moderate rains resumed in parts of Shabelle, Juba, Gedo, Bay and areas of Bakool and Hiran. The FSNAU will closely monitor rain performance through the end of December.



Good Germination of Sesame Crop, Buale, Middle Juba, November '09.

According to field reports, cereal production is expected to be near normal in southern Somalia. The upcoming cowpea harvest in Cowpea Belt areas also looks like it will be near normal levels. Field reports also indicate that the areas cultivated have increased as farmers have taken advantage of the good start of *Deyr* rains. Additionally, IDPs who fled conflicts are increasingly engaging in farming activities. This season, larger areas have been planted with sesame in both rain-fed as well as riverine areas due to high sesame prices and increased export demand.

In the agropastoral areas of Awdal, West Galbeed and Togdheer regions in the northwest, significantly below average crop production was forecasted during post *Gu* '09 assessment due to below normal and unevenly distributed *Gu* '09 rains. However, *Karan* rains received in late July-Sept. '09 improved crop development in Awdal and W. Galbeed and production is likely to exceed the forecast yet remaining below average. FSNAU and partners will carry out post-*Gu*/*Karan* crop harvest assessment in December 2009.

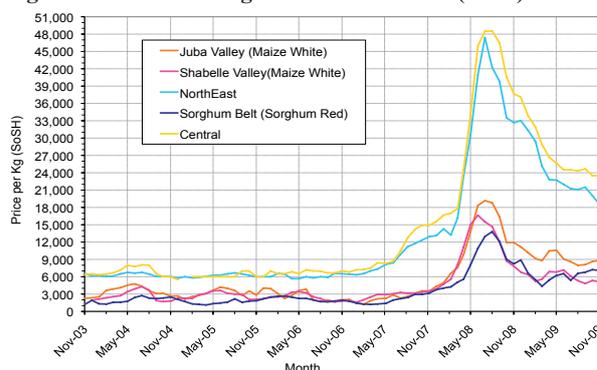
Cereal Prices

Maize and sorghum prices vary considerably across the main reference markets of southern Somalia. Price declines of 10-25% in locally produced maize and sorghum were recorded between July-Nov. '09 in Shabelle, Bay and the riverine areas of Juba regions. Jammame showed more drastic declines, where the maize price decreased by 57% over the same period (from 7,500SoSh/kg to 3,200SoSh/kg). These cereal price decreases are attributed to high supply in the markets due to the promising *Deyr* '09/10 cropping season, reduced road blocks (particularly Shabelle, Bay and parts of Juba regions) and stability of the Somali Shilling against the US dollar. However, the prices of maize and sorghum in southern markets are still 120% to 230% higher compared to the 5-year average for November (2004 – 2008).

The lowest maize prices in Nov. '09 (3,000-5,000 SoSh/kg) were recorded in riverine livelihoods of Jammame (Lower Juba), Jilib and Buale (Middle Juba), Afgoye, Marka and Qoryooley (Lower Shabelle) due to good *Gu* '09 and off-season maize productions. Whereas the highest maize prices (12,000 - 14,000 SoSh/kg) are in the main markets of pastoral livelihoods zones in Dhobley, Afmadow and Hagar (Lower Juba), mainly due to the remote locations high transportation costs, poor *Gu* '09 cereal production, as well as road blocks caused by conflicts in Afmadow and Badhade (Figure 2).

Sorghum prices in Nov. '09 were lowest (3,500SoSh/kg to 4,500SoSh/kg) in the main markets of Bay region (Baidoa, Qansaha Dhere and Diinsor), as well as Lower Shabelle (Wanlaweyne district - 4,700SoSh/kg). Conversely, the highest sorghum prices (8,000 – 10,000 SoSh/kg) were recorded in Gedo (Luuq, Bardheere) and Bakool (Hudur). In the coming months, maize and sorghum prices are likely to continue to decline in Lower Shabelle, Bay and Juba riverine because market supplies are expected to be high during the post-*Deyr* '09/10 period. Conversely, cereal prices may increase in agropastoral areas of Lower Juba, Hiran, Gedo, Bakool and parts of Middle Shabelle regions due to the overall low cereal stocks from the *Gu* '09 season, disruptions of market activities and restrictions of inter-regional trade resulting from civil insecurity. FSNAU will closely monitor cereal market availability and prices in the main markets in the coming months.

Figure 2: Trends in Regional Cereal Prices (SoSh)



Labour Opportunities

Good rainfall and crop establishment/development have increased income opportunities for poor households in most parts of southern Somalia. FSNAU expects that the current agricultural production cycle will provide continuous labour opportunities (e.g. sowing in *Desheks* of Lower Juba, first and second weeding, bird scaring and harvesting) in the coming months in Juba, Shabelle, Bay, Bakool, Gedo and Hiran. Interestingly, the heavy rains and flash floods in Oct. '09 also significantly increased the demand for labour, as well as the cost of planting and weeding in the riverine and agropastoral livelihoods of southern Somalia. The intensified activities increased labour wage rates in all areas except for conflict-affected areas of Juba. The ongoing cash-for-work project of the irrigation canal de-silting in Lower Shabelle region has also provided job opportunities to the poor and shall contribute to good *Deyr* crop production in the riverine areas.

Terms of Trade

The terms of trade between cereal and labour in the maize producing areas of Shabelle and Juba riverine showed improvement in Nov. '09 when compared to July '09. The improvement is due to good *Gu* '09 cereal production and expected near normal *Deyr* '09/10 production; this led to declines in cereal prices and increases in labour wage rates. To illustrate since last July, the TOT between maize and the daily labour wage have doubled in Shabelle regions. In Juba regions, the aggregate TOT (maize/labour) increase is equivalent to 5%, despite a significant maize price decline in the main markets of riverine areas.

However, the TOT for sorghum producing areas showed a more complicated picture with substantial differences among the main markets of the Sorghum Belt. The TOT between July '09 and Nov. '09 declined by 20-40% in most markets (Gedo, Bakool, Hiran) due to increased sorghum prices following *Gu* '09 crop production failure. However, in the Bay region TOT showed increases, with a substantial increase of 61% observed in Baidoa markets. Due to the opposite directions in TOT changes across the main markets of the Sorghum Belt, the aggregated TOT for all Sorghum Belt markets (including Bay) for Nov. '09 shows the overall decline of only 5% from July '09.

The highest TOT (cereal/labour) in November were recorded in the maize producing areas of Jammame in Lower Juba (32kg/daily labour wage) and Qoryole in Lower Shabelle (27kg/daily labour wage). In Bay, where sorghum production was good, Qansah Dhere and Baidoa (23kg and 18kg/daily labour wage, respectively), also recorded the high TOT. Overall, the terms of trade in Nov. '09 are 58% and 35% higher than the 5-year average in Shabelle and Juba regions, respectively, while in Sorghum Belt these are 10% lower (Figure 3).

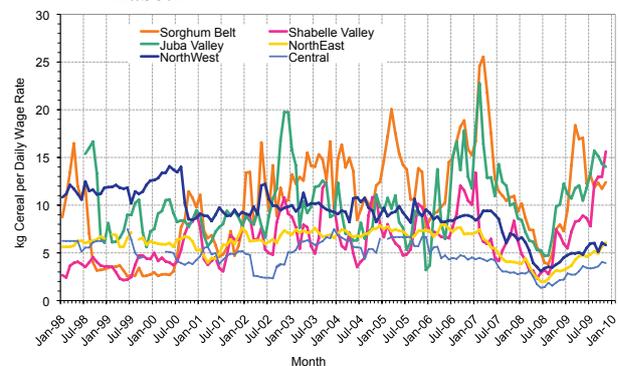
LIVESTOCK

Pasture and Water Conditions

Following the average performance of *Deyr* rains browse and grazing conditions have greatly improved in most grazing sites of the north, including Hawd, Nugal valley, most of Sool Plateau and Guban livelihood zones. Reports indicate that water catchments are replenished and water trucking has discontinued, leading to a decrease in water prices. Pastoralists are reducing their usage of boreholes because livestock are able to access water at other sites.

In contrast, pasture conditions appear extremely poor in western parts of Sool plateau (particularly in Erigaabo, Ceelafweyn and Taleeh districts), as well as most of Upper Nugal (Caynabo, Ceelafweyn and western parts of Xudun districts), Golis mountains with the adjacent plains, Hawd of Hargeisa, coastal areas in Bari and Nugal regions, Hawd and Addun (Jariban district) of north Mudug. Water catchments and *berkads* in these areas are only partially full and water prices have been increasing since November. Pasture and water in these areas are likely to be insufficient for livestock herds through the *Jilaal* dry season (January to March). This may cause early water trucking in Sool plateau and Upper Nugal valley, Hawd and Addun (Jariban district) of north Mudug as well as Hawd of Hargeisa.

Figure 3: Regional Trends in Terms of Trade, Cereal to Labour



Poor Pasture Conditions, Hawd of Galgadud, November '09

The worst pasture and water conditions are observed in North Galgaduud (Abudwak, Dhusamareeb and Adaado districts) as well as Hiran (Hawd pastoral, Southern Inland pastoral and agropastoral areas of Jalalaqsi and Bulo-Burti districts), which are experiencing a sixth season of drought. However, in the southern regions of Shabelle, Juba, Bay/Bakool and Gedo, pasture has almost completely recovered and water catchments are replenished.

Generally, livestock in southern Somalia have returned to respective livelihood zones due to sufficient pasture and water resources.



Good Pasture Condition, Juba regions, November '09

Additionally no abnormal livestock migration is observed in the north, while intra-regional migrations are reported from rain-deficit areas to areas with good/normal rainfall in lower and central Nugal valley, east of Sool Plateau and Hawd of Sool, Nugal and Togdheer regions. Early migration from areas with poor rainfall in the north to the Golis, Guban and Coastal *Deeh* livelihood zones has also started in order to benefit from the *Hays* rains (late Nov. '09 through Feb. '10). Conversely, in central areas, significant abnormal migration of livestock is reported in northern districts of Galgaduud region with livestock moving to Somali region of Ethiopia, south Mudug and south of Galgaduud. In Hiran region, cattle pastoralists migrated to Middle Shabelle.

Livestock Body Condition, Production and Reproduction

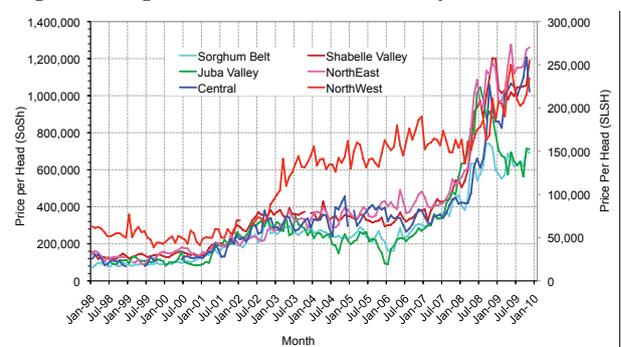
Throughout the pastoral livelihood zones, livestock body condition is directly related to seasonal performance. In W. Galbeed and Awdal regions, cattle and sheep have weak body conditions, particularly lactating and older animals. They show limited signs of recovery because of poor pasture rejuvenation due to overgrazing of limited communal grazing areas. Additionally, there has been almost no fodder production and cattle are only surviving through hand-feeding with premature crops. Camel body conditions are also poor due to the suspected Camel Pox disease. However, in Sool, eastern Sanaag, parts of Bari and Nugal, north Mudug, south Galgaduud, Hiran, Middle Shabelle, Bakool, Gedo and Lower Juba regions livestock are recovering from the previous emerging drought and successive poor seasonal performances. The recovery to average body conditions, is attributed to improved access to good to average pasture/ browsing conditions and fodder availability in most areas. In Lower Shabelle, Bay and Middle Juba regions, which have had many successive good seasons, livestock body conditions are good.

In the north, livestock production and reproduction are low because of limited conception during the past *Jillaal* and *Gu* '09, as well as livestock diseases for camels and goats during *Hagaa* '09 that resulted in death and caused abortions. In the areas that received average rainfall, camel conception started at a low rate, although major calving/ kidding is expected in Dec. '09. The cattle calving rate in the central livelihood zones of the Cowpea Belt and Hiran agropastoral, as well as in agropastoral zone of the northwest are very low due to the emerging drought and poor pasture. However, in most southern regions calving/kidding has started at a low rate and will increase in Dec. '09 and Jan. '10; the exception is Bakool where cattle conception has been low because of drought. Milk production and availability throughout Somalia with the exception of north Galgaduud and Hawd of Hiran has improved slightly because of increased milk yields in areas with improved calving/kidding and the increased availability of water and forage.

Livestock Trade, Prices and Terms of Trade (TOT)

Last month, there were livestock price increases in most areas of Somalia with the exception of cattle in the northeast and local quality goat in Sorghum Belt, as well as all livestock species in central regions. Cattle prices in the south and northwest have increased by 12-23%, while in the northeast, the prices decreased by 7%. However, compared to Nov. last year the cattle prices are still lower in Sorghum Belt (42%), Shabelle (18%) and Juba (30%) regions. Local quality goat prices in the northern regions increased by 1-9% in the last month, but are 7-11% higher compared to Nov. '08. Export quality goat prices have also increased marginally (up to 5%) in Nov. '09 due to high demand during Hajj season, low market supply as a result of repeated droughts, as well as lifting of the Somali livestock export ban by Saudi Arabia (Oct. '09). Terms of trade (TOT) of cereal to local goat increased in the last month in most areas of Somalia, except in the central zone where it has declined by 11% since Oct. In the Sorghum Belt, Shabelle and Juba regions, the percentage increase in TOT (cereal to cattle) is equivalent to 14%, 29% and 21%, respectively (Figure 4).

Figure 4: Regional Trend in Local Quality Goat Prices

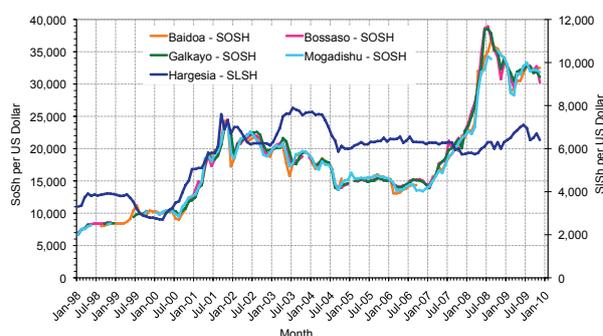


The removal of the livestock import ban resulted in sharp increase of livestock exports from Bossaso and Berbera in November after a drastic decline (47%) observed between Aug.-Oct. '09. The livestock exports increases are equivalent to 484% (from 71,520 to 346,142 heads) in Bossaso and 998% (from 80,356 to 801,886 heads) in Berbera. Conversely, the Burao slaughter-house has not exported meat in the past two months (Oct. - Nov.) due to the expiry of contract with the United Arab Emirates (UAE). However, the Galkayo slaughter-house has exported 2,500 carcass heads in Oct. '09, which is similar to Sep. '09 export volume but still 37% lower than in Aug. '09.

MARKET AND TRADE

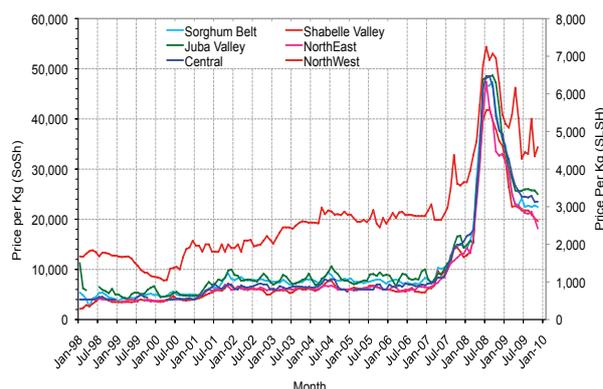
In the first half of the year, the Somali Shilling (SoSh) showed a fluctuating trend against the US dollar (USD) appreciating by an average of 8% in Jan.-Mar. '09 and devaluing again in Apr.-July '09 (3%). However, in the second half of the year SoSh began to appreciate and by Nov. '09 gained 4-8% in value in most markets. For instance, in Mogadishu main Bakaara market, one USD was exchanged for SoSh 31,840 in Nov. '09, which is an approximate 5% increase in value since July '09. The current value of SoSh across different markets is 2-8% greater compared to its levels in Nov. last year. However, the level of depreciation of SoSh is still high compared to the 5-year average (2003-2007), ranging between 80-90% across most markets of southern Somalia (Figure 5).

Figure 5: Trends in Exchange Rates - SoSh and SISH to USD



The Somaliland Shilling (SISH) has lost 11% of the value in the first half of the year but recovered during July-Aug. '09. After resuming devaluation in the following two months (Sep-Oct. '09) the currency appreciated again in Nov. '09 returning to its levels at the start of 2009. The current value of SISH, which was traded in Nov. '09 for 6,400 SISH/USD at Hargeisa market, is comparable with the 5-year average (2003-2007). The recent appreciation of SoSh and SISH is attributable to the increased livestock export during Hajj.

Figure 6: Regional Trends in Imported Red Rice Prices



Import Commodity Prices

The supply of imported commodities increased since the last reporting period (Jul.- Sept.'09) due to the end of monsoon season. Therefore, the prices of major import commodities, including red rice, sugar, vegetable oil and fuel, remained relatively stable in most markets of the Somali Shilling areas. The exceptions are Shabelle regions and the Somaliland Shilling areas where vegetable oil price increased by 17% in the last 2 months although the highest price on this commodity was recorded in central regions. During the same period, price declines were observed in the northwest for sugar (10%), petrol (10% each) and rice (14%), after moderate increase during July-Sep. '09 (see FSNAU Quarterly Brief for Nov. '09).

Overall, the prices of all commodities in Somali Shilling areas are considerably higher (107 - 235%) compared to the Nov. 5-year average levels. The same applies to Somaliland Shilling areas (20-80%), with rice prices showing the highest percent increase (Figure 6). It is expected that the import commodity prices will reduce slightly in the coming months as the volume of imports is likely to increase due to expected growth in livestock exports following the recent lifting of Saudi Arabia's livestock export ban (see Livestock sector).

NUTRITION SITUATION

In October and November FSNAU with partners, conducted 9 representative nutrition surveys in Togdheer, Mudug, Galgadud and Hiran regions. The results of the surveys indicate a *Sustained Nutritional Crisis* in Central and Hiran regions with a less concerning yet critical situation in Togdheer.

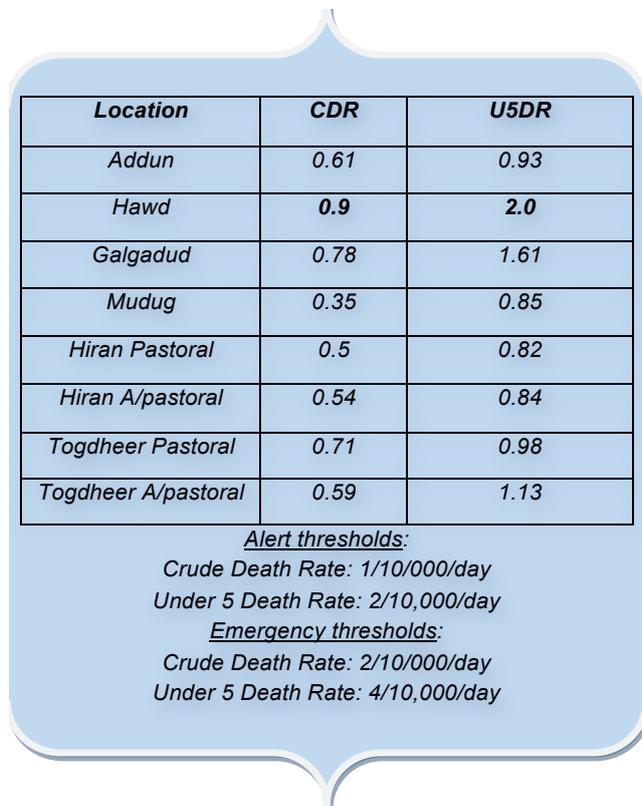
In Central regions 4 surveys¹ representing the 2 livelihoods and the 2 regions were conducted and, based on WHO (2006) growth standards, all the rates are indicating a very similar situation. For the livelihood based surveys, results of 20.2% (15.6-24.7) Global Acute Malnutrition (GAM) and 4.6% (2.8-6.3) Severe Acute Malnutrition (SAM) were reported in the Addun livelihood and 19.1% (15.3-23) GAM and 4.3% (2.7-5.9) SAM in the Hawd livelihood. For the region based surveys results of 19.4% (14.5-24.3) GAM and 5.5% (3-7.9) SAM were reported in Galgadud and 22.3% (17.6-27) GAM and 6.1% (4.1-8.1) SAM in Mudug. The death rates were in line with baseline figures, with the exception of the Hawd survey where both rates approached the alert levels.

These results highlight the sustained crisis in Central region and indicate no improvement from the situation reported in the *Gu* season six months ago. This sustained crisis has also been noted in selective feeding centers run by international agencies in the region, where increasing numbers of severely malnourished children are being admitted. With the continuing poor food security outlook for the region, all efforts to ensure the sustained delivery at scale of life saving interventions such as food aid, nutrition rehabilitation services, health, water and emergency livelihoods support are essential to prevent further deterioration.

Hiran region is also in a sustained crisis with **Very Critical** rates of GAM in all three surveys exceeding 20%. There was no difference between livelihoods with the Riverine population survey reporting results of >20% GAM and >4% SAM²; the Pastoral population survey reported results of 21.2% (16.5-25.8) GAM and 5.3% (3.1-7.6) SAM and the agropastoral population survey reporting results of 23.4% (19-27.8) GAM and 7.4% (3.9-10.9) SAM. Deaths rates were in line with baseline figures. However, similar to Central region, response agencies in the region also report high admissions into selective feeding centers. When compared to the *Gu* '09 surveys no change has been noted in the agropastoral population, however some deterioration from the *Critical* rates in the Pastoral and Riverine populations, have been recorded. This again highlights the need for sustained humanitarian interventions at scale in Hiran to meet the needs.

Finally some improvements were noted in Togdheer region in the northwest. Although a representative survey were not conducted during the *Gu* '09, an integrated analysis indicated a *Very Critical* nutrition situation in the agropastoral population based on data from rapid assessments and health centers, however the recent survey reported a **Critical** situation with **16.1%** (13.1-19.1) GAM and 2.9% (1.5-4.4) SAM. During the *Gu*, the high numbers of children identified as acutely malnourished were thought to be associated with an outbreak of acute watery diarrhea and general high disease burden in the area. Currently no such cases are being reported, which may be the reason the situation may have improved to some extent, however it remains of concern and efforts to rehabilitate the acutely malnourished in that population are needed. For the Togdheer pastoral population the situation is classified as **Serious** with the recent survey reporting a GAM rate of 10.1% (7.7-13.2) and a SAM rate of 1% (0.4-2.4). Death rates in both surveys were below alert levels (Figure 7). A comprehensive analysis will be reported in the December Nutrition Update.

Figure 7: Death Rates Reported in Central, Hiran and Northwest assessments (Oct. - Nov. '09)



1 4 relates to the numbers of representative results however the surveys overlapped in central regions covering both the livelihoods based areas (Addun & Hawd) and the regional based (Galgadud & Mudug), this was done to support programming decisions for partners.

2 For the Riverine population survey a small sample 2 stage cluster survey was conducted and results determined using the CDC calculator at 90% probability

INTEGRATED FOOD SECURITY ANALYSIS

There are signs of improvement in the overall food security situation in most livelihoods of Somalia, as a result of near normal crop performance, good pasture/browse conditions and improved water availability following average and above average *Deyr* '09 rains. These conditions contributed to improvements in livestock body condition, increased the number of marketable animals as well as livestock prices. Also, cereal prices have declined in the main markets of southern Somalia. Labour opportunities have improved, as well as the terms of trade and purchasing power of population in most livelihoods. The exceptions are, Hawd of Hiran, Galgaduud, Mudug and Hargeysa, parts of agropastoral areas in the northwest, as well as parts of Addun and Sool Plateau (particularly western part) that experienced poor rainfall performance that impacted pasture/browse and water access, as well as crop development.

Southern Regions

Southern regions experienced improvements in the food security situation during *Gu* '09 with 9% decline in the number of people in crisis (543,000 people) since the previous *Deyr* '08/09 season (see Technical series on 2009 Post *Gu* Analysis). In the current *Deyr* season, the food security situation of rural livelihoods in the south continued to improve, as job opportunities have increased due to near normal *Deyr* crop performance as well as off-season crop harvests.

Pasture/browse conditions have also improved, as well as the livestock body conditions, production and reproduction. Milk production and availability have also improved slightly in most areas with the exception of Bakool region (see Livestock sector). Local cereal prices are reduced, while livestock prices have increased. All the above factors have led to improved terms of trade (labour to cereals, livestock to cereals) and purchasing power of the population (Figure 8). This increasing trend of terms of trade is observed, particularly in Bay, Bakool, Gedo, Shabelle and Juba regions. All the above developments as well as favourable *Deyr* 09/10 crop prospects, raise expectations that food security will improve and number of population in crisis will decline in the coming 6 months in most livelihoods of southern regions of Somalia, except in agropastoral livelihood in north Bakool.

Central Regions (Mudug, Galgaduud and Hiran)

The food security and nutrition situation in central regions has continuously deteriorated since *Gu* '07, due to poor seasonal performance, high IDP presence, civil insecurity, market disruptions, hyperinflation and high cereal prices. Central regions were hit by five straight seasons of rain failures, which have caused drastic decreases in all livelihood assets, forcing households to adopt extreme distress coping strategies to survive or to move to main villages and towns as the destitute. However, there are some improvements observed in central regions due to average *Deyr* '09/10 rains, which enhanced rangeland and water conditions. This contributed to improved body condition of livestock, which were sold at high prices between July and Nov. '09 (although there was a slight price decrease in the last two months). At the same time, rice prices (see Market sector) reduced during July-Nov. '09, which led to improved terms of trade between local goat and rice as well as labour and cereal (Figure 9).

Further, the crop performance in parts of Hiran and Cowpea Belt in Galgaduud and Mudug is near normal, which increased opportunities for labour, such as weeding, irrigation, etc. Exceptions are Hawd and parts of Addun livelihoods, where below normal *Deyr* rainfall resulted in livestock movement to neighboring livelihoods, family splitting and increased pressure on limited pasture and water resources. However, regardless the performance of *Deyr* '09/10 rains and price trends for livestock and cereals the population will not recover from the crisis in this season considering its prolonged nature and severity. The recovery of livelihood assets will take several consecutive average seasons.

Figure 8: Terms of Trade Labour To Maize (1Kg)-Jammame

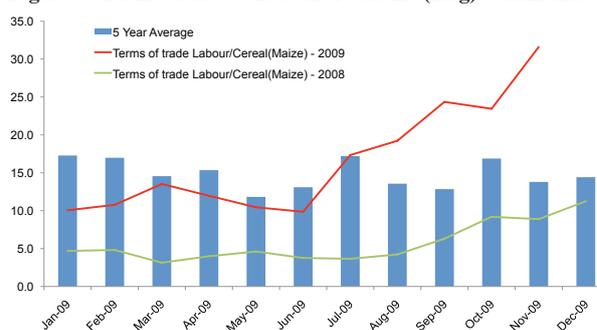
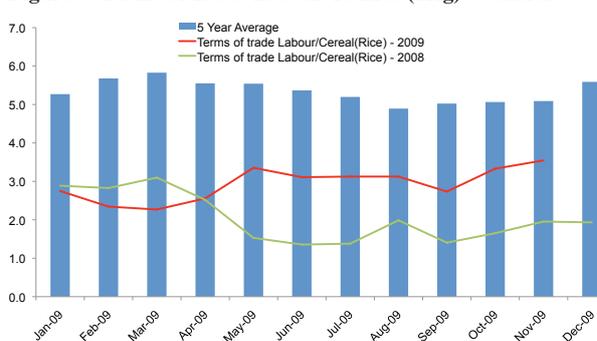


Figure 9: Terms of Trade Labour To Rice (1Kg) - Central



Northern Regions

During Post *Gu* '09 assessment, estimated 280,000 people in northern regions were identified in crisis due to the deteriorated food security and nutrition situations in pastoral and agropastoral livelihoods. In the current *Deyr* season there are signs of improvement in most parts of the north due to average to above average rains, which led to enhanced water, rangeland and livestock body conditions in pastoral livelihoods and improved crop performance (in both establishment and development) in parts of agropastoral areas (Awdal, W. Galbeed). Other factors that are contributing to improvements include increased livestock trade activities and livestock prices due to high export demand for Hajj and lifting of the livestock trade ban by Saudi Arabia; reduced cereal prices (sorghum, maize and rice); improved job opportunities and wage rates during *Gu/Karan* crop harvesting season; and, consequently, improved terms of trade (Figure 10 and 11).

Conversely, poor *Deyr* rains preceded by the dry *Hagaa* season negatively affected pastoral livelihoods of the Hawd of Mudug, Nugaal and W. Galbeed regions, as well as parts of Addun, Sool Plateau (western part) and agropastoral areas in the north. This has prompted livestock migration to the neighboring livelihoods with average or above average rainfall. The *Hays* rains that started in the Golis and Guban livelihoods and Coastal Deeh of Bari region may attract more livestock from neighboring regions, which could lead to an early depletion of pasture in these areas.

Considering the current improvement in pasture and water conditions and increased livestock exports, food security situation is expected to improve in parts of the north with the exception of the areas that experienced below normal *Deyr* rains.

Figure 10: Northeast Average Monthly Local Quality Goat Prices

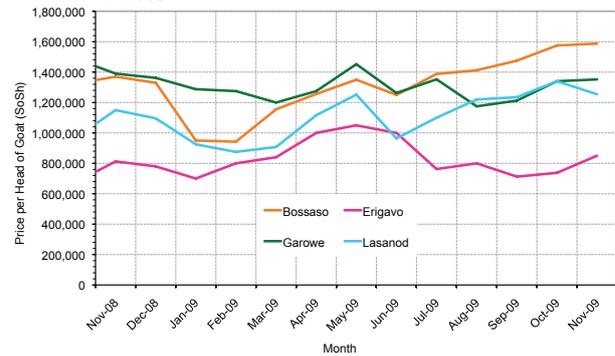
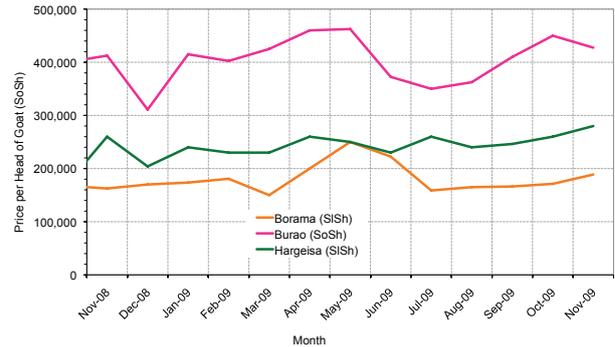


Figure 11: Northwest Average Monthly Local Quality Goat Prices



Recent and forthcoming publications and releases

- FSNAU/FEWSNET Market Data Update, November 2009
- FSNAU/FEWSNET Climate Data Update, November 2009
- FSNAU Technical Series Report Nutrition Situation, September 2009
- FSNAU Technical Series Report, Post *Gu* '09 Analysis, September 2009

NOTE: The above publications and releases are available on the FSNAU website: www.fsnausomali.org

