

Climate

Markets

Nutrition

Agriculture

Livestock

**Civil
Insecurity**

**Emerging
Regional
Issues**

Overall, *Deyr* rains are considered to be normal, resulting in regeneration of pasture, normal crop establishment and improved water availability. The outlook for the *Deyr* season is expected to be normal in most of the central and south. Pasture, and water availability has improved and migration patterns are resuming to normal in most areas. Cereal crop establishment and development is good in main producing areas of the south. While the rapid increase in price of food commodities over the last 12 months has slowed down, prices are still significantly higher than 12 months ago and the five year average. Civil insecurity continues to dominate much of the country and is continuing to reduce movement of people and goods, including food commodities. The uncertainty of political environment is continuing to impact negatively on trade and income opportunities.

Localised flooding along the Juba and Shabelle rivers is reported. The impact of the flooding can bring both positive and negative impacts to the community. In some cases crops are destroyed while other regions create opportunities to carry out recessional planting as well as fishing. The flooding has likely contributed to the outbreak of acute watery diarrhoea (AWD) being reported in these areas. Burao, Berbera and Bossaso IDPs are also faced with outbreaks of AWD.

Key Issues & Early Warning for January to June 2009

- **Continuing Acute Food and Livelihood Crisis (AFLC) and Humanitarian Emergency (HE) for pastoralists in the Central, Hiran, and Bakool regions, despite near normal *Deyr* rains.** Although pasture and water have improved, pastoralists are continuing to struggle. Herd sizes are severely depleted because pastoralists have sold large numbers of animals over the last 6 – 12 months to cover the high costs of food and water trucking and herds could take from 3 to 4 normal seasons to recover depending on the livestock species. Households are severely indebted and social support mechanisms are overburdened. Food prices, though stabilizing, still remain at record high levels. With limited livestock to sell and high prices, pastoralists will continue to struggle to not only meet their basic food and nonfood needs, but to take actions to recover their primary livelihood asset; livestock (see p. 9-10).
Pastoralists will continue to face conditions of HE and AFLC and it will take several good seasons for livelihoods to recover.
- **Favourable cereal crop prospects bring improvements for agricultural populations in the south.** Near normal cereal production and availability in the south is improving livelihood options and helping to stabilize food prices. Throughout the main agricultural areas of southern Somalia the situation has improved since the *Gu* '08. Off season crop production is better than projected, *Deyr* '08/09 rains are, so far, normal in most areas and crop establishment and development is good. Cereal production and availability is expected to be good in the *Deyr* '08/09 season harvest, especially in the Shabelle regions, Bay, Bakool and Gedo. Income opportunities are currently good in the main cropping areas. Good cereal production will improve food access for agriculture households, as well as help stabilize food prices (see p.7-9).
Depending on outcome of cereal harvest and prices, in areas of good crop production, the number of people in AFLC and HE could decline over the coming six months.
- **Large numbers of Somali families continue to migrate internally and to neighboring countries due to insecurity, loss of livelihood assets, and exhausted coping options.** Although the *Deyr* rains are bringing some improvements, for many households, it is too late as they have already either lost their assets and exhausted their coping options, or have been forced to relocate due to security threats. Food prices within the country are still at record high levels, and insecurity and criminality is continuing to spread and deepen throughout country.
The number of IDPs is likely to continue to grow, not only leading to increased humanitarian needs, especially in neighboring Kenya border areas, but also creating longer term problems around resettlement and livelihood recovery.

- Ongoing crisis for poor and most vulnerable urban populations.** In some urban centres, prices for main food items have stabilized and in some cases declined since the *Gu* '08. In addition, in some areas, monitoring data indicates that income opportunities and wage rates have improved, especially in agricultural areas. However, despite these improvements, in most of the urban areas, the cost of the minimum basket remains extremely high, and there is a notable increased dependence on external assistance to cover basic needs. Loans, gifts and remittances have increased between 50% and 170% from June to Oct '08, urban poor are consuming a poorly diversified diet, and there is a notable increase in distress coping strategies (see p. 3-4).
Although some improvements are noted, the cost of basic food and nonfood items are still beyond the reach of many of the poor and most vulnerable urban populations. These households will continue to depend on external assistance to cover their basic needs, facing conditions of AFLC or HE, as long as there is hyper-inflation and an economic crisis.
- Some improvement for pastoral populations in the north.** Good rains throughout much of the north during October has alleviated water and pasture shortages for the majority of the pastoralists. However, there has been significant asset stripping (selling of livestock) to cover the cost of water and food. Livestock exports are lower compared to this time last year due to reduced numbers of marketable animals. Milk consumption and income from milk sales remains low to zero. The nutrition situation in Golis/Guban is **Very Critical**, while in Sool Plateau; the situation is in the **Alert** phase based on assessments conducted in October 2008. An outbreak of AWD was reported in Burao, Berbera, Erigabo , Hudun and Bossasso in September-October.
Pastoralists will remain in AFLC through to Gu '09 in the Hawd, Sool Plateau, Kakaar-Dharor, and Nugaal Valley livelihood zones, with a decrease in the number affected. Northwest agro-pastoralists that were identified in High Risk to AFLC, are expecting average Karan harvest thus reducing the risk to deterioration.

URBAN ASSESSMENT

FSAU conducted the third round of urban assessments in October, gathering price information on food and non food items, as well as income and nutritional information. It was planned to carry out the assessment in 51 locations, but due to insecurity FSAU Field Analysts in some areas had travel restrictions and as a result 38 were assessed. The economic aspects of the analysis include the Cost of the Minimum Basket (CMB), as established by FSAU (see *Gu* technical series for details), income including wages, petty trade, remittances and gifts, and finally the gap analysis which determines whether households at each sample site have sufficient income to cover the cost of the minimum basket.

Cost of Minimum Basket

As indicated in Figure 1 and 2, generally there has been a plateau or even a decrease in the cost of the minimum basket since June '08 particularly in the south. In 50% of the sites assessed, the CMB has stayed the same or decreased. The main factor that contributed to the decrease is the local cereal prices in the main agricultural areas (see Agriculture sector). As cereal is the most significant item in the minimum basket, the overall cost is particularly sensitive to cereal price fluctuations. In contrast the urban centres in pastoral areas, the CMB has generally continued to increase. These areas have not benefitted from the decrease in sorghum prices, nor have they had access to the agricultural labor.

Income

Income levels increased in 26 out of 38 sites between June and October. The increases are equally distributed between urban and rural centres. In agricultural areas there are reports of good employment opportunities, due to the off season harvest, planting and weeding activities associated with the favourable start of the *Deyr* season. Daily wage rates have increased over the last 3 months. In the Shabelle for instance the wage rate has increased by nearly 30% since June, and the ToT (cereal to labour) has more than doubled. Remittances (from abroad), gifts (from within the community) and loans have continued with about 50% of the sites show an increase since June '08. It is noted that sites that decreased were in areas which had very high remittances in June, and this could indicate a degree of fatigue, or inability to maintain high levels of support from the better off, and the Diaspora (Table 3). In October field reports indicate that women are working the same number of days as men as well as carrying out other essential household tasks. An analysis shows a disparity between income levels of men and women and in most cases the daily wage rate for women is about half that of men.

Gap Analysis

The gap analysis calculates the difference between CMB and income indicating if poor households have adequate income to cover minimum needs, not actual expenditure. Overall the gap analysis indicates that in the northeast and central areas there are still significant gaps, with the highest in Dhusamareb, Rako and Erigabo (See table xxx). Most of the northwest and southern regions show that households have sufficient income to cover their basic (minimum) needs. However in most of the sites there has been a significant increase in the level of cash gifts, loans and remittances. In some locations decreases in these sources of income were observed however these generally correspond to areas which have no gap such as Gedo and Shabelle regions, The increases in loans gifts and remittances from June '08 till Oct '08 range from just over 50% to nearly 170% indicating an increased dependence on external assistance.

Figure 1: Total Cost of a Minimum Basket, Urban Towns

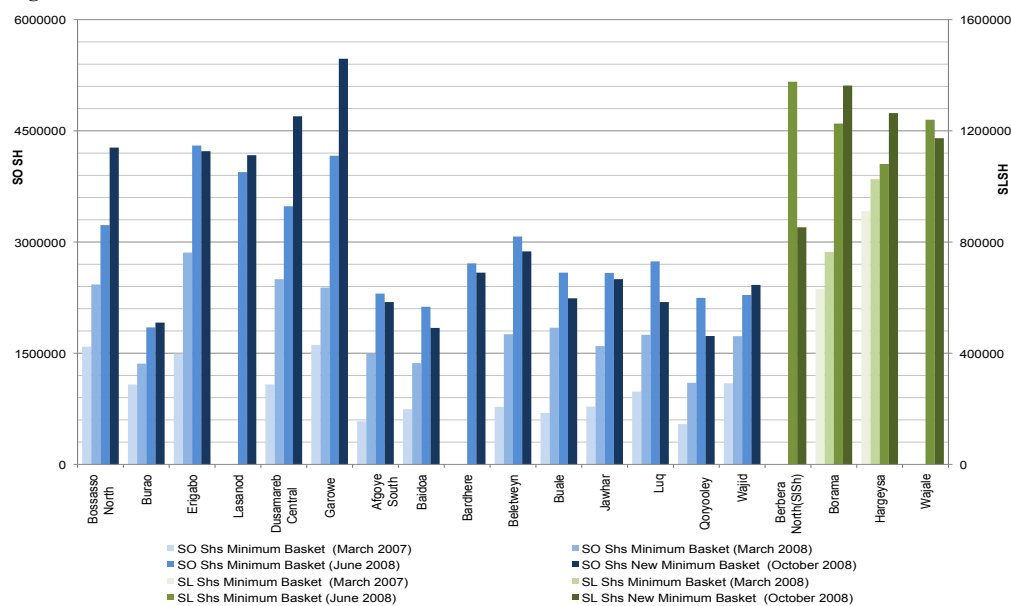


Figure 2: Total Cost of a Minimum Basket, Rural Towns

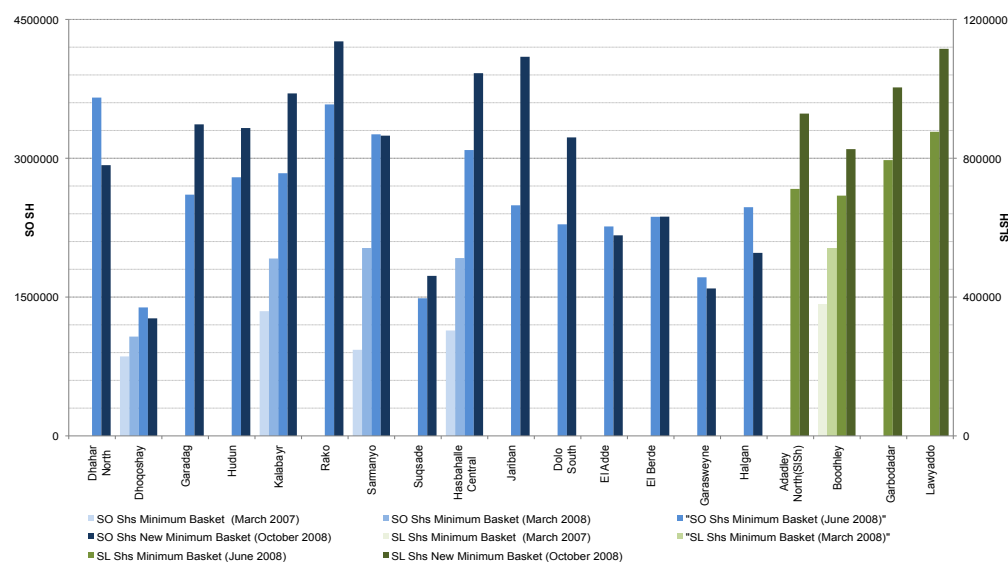
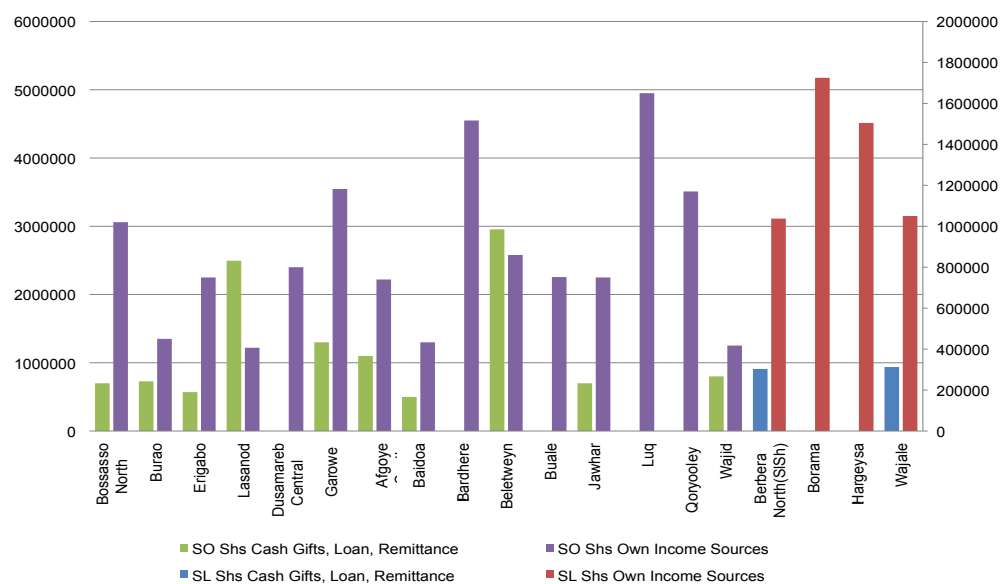


Figure 3: Urban Income Breakdown, October '08



Nutrition Situation

The nutrition component of the urban assessment was conducted in six regions (Gedo, Lower Shabelle, Bay/Bakool, Middle Juba - Buale Town only, the Northeast and Northwest regions), and covered 35 urban centers, with an average of 10 randomly assessed households in each center. The assessment incorporated a review of household food consumption¹ based on a 24 hour recall period, and the coping strategies adopted currently compared to a similar period in year 2007, for the purpose of trend analysis.

Household Dietary Diversity: Analysis of findings² from the urban centers in Gedo and Shabelle regions indicates a *Serious* situation with 20% or less of the assessed households reportedly consuming a poorly diversified diet of less than four food groups in the preceding 24 hours. This was the first urban nutrition assessment with no prior study having been conducted to enable trend analysis. However for centers in Bay Bakool, the Northeast (Rako and Garowe), Sanaag and Sool regions, the proportion was *Very Critical* with 40% - 67% of the assessed households consuming a poorly diversified diet. Consumption of a diverse diet is crucial for supply of nutrients required for normal functioning of the body. The most commonly consumed foods were cereal, sugar and oil. Milk consumption was high in the Lower Shabelle (91%), but poor in the other regions, (40% in the Northeast, 50% in Bay Bakool, 59% in Awdal/Galbeed, 67% in Toghrder, 23% in Sanaag, 10% in Sool and 45% in Gedo). Purchase was the main source of food for the assessed households, coupled with food aid in Gedo (22%), gifts (30%) in Garowe Town, own production (30%) in Lower Shabelle and bartering in Bay/Bakool (25%).

Coping Strategies: Analysis of aggregate data on coping strategies adopted in the month of October of 2007 and 2008 shows an increase in the proportion of households applying distress coping strategies in the past year, i.e. skipping entire days without eating, restricting consumption by adults in order for small children to eat, borrowing food or relying on help from friends or relatives. In October 2007, 32% of the assessed households reported to have applied at least one of these distress coping strategies, while in October 2008, the proportion increased to 59%, indicating increased stress at the household level. The most affected regions in 2008 are Shabelle, Gedo, Toghrdeer, Sool, Sanaag and the northeast regions (Figure 4 and 5). This is likely attributed to a deteriorating food security situation following a series of shocks as described earlier.

Detailed analysis of the urban nutrition findings will be shared in the FSAU Nutrition Update for September-November 2008 scheduled in mid November 2008.

Figure 4: Proportion of Assessed Households with Distress Coping Strategies, 2008

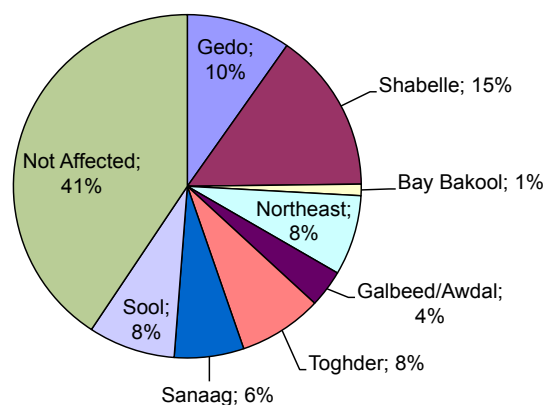
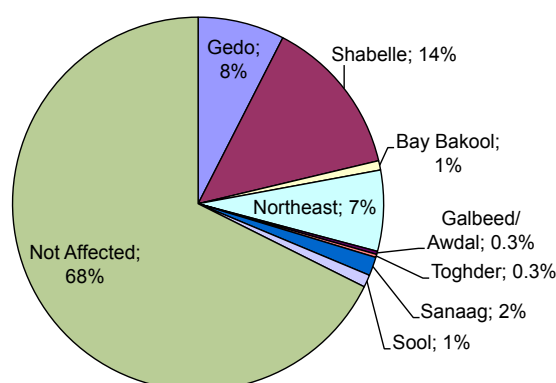


Figure 5: Proportion of Assessed Households with Distress Coping Strategies, 2007



¹ Based on the UNFAO Food groups classification system

² Based on the Somalia Nutrition Situation Estimation Framework, February 2008 Version

POPULATION MOVEMENT

Multiple shocks such as drought, successive crop failure, inflation and recurrent conflict have eroded household food security throughout Somalia. The combination of diminished livelihood assets and exhausted coping options has forced large numbers of Somali families to migrate both internally and to neighbouring countries. It is estimated that since early 2007, over 900,000 people in Somalia have been internally displaced. An FSAU field population assessment within Somalia carried out in October 2008 indicates that the majority of migrating families have sought refuge in neighboring Kenya. The main reasons for leaving include, security, lack of economic opportunities, lack of social services and in particular education for children, and lastly the loss of hope for any improvement in the future.

Kenya's Dadaab refugee camp, located 100 km north of Garissa town, is a primary destination of Somalis seeking assistance cross-border. The main border crossing points from Somalia to Dadaab are Belet Hawa, located in the Gedo region and Dhobley, located in the Lower Juba region. Information from UNHCR Kenya confirms that as of October 7th, 2008, the refugee population in Dadaab stood at just over 217,000 persons. This year alone, refugee camps in Kenya have registered more than 47,000 new refugees, out of which about 45,000 or 96% are new arrivals from southern and central Somalia, the epicenter of the current humanitarian crisis in Somalia. There are also about 6,000 new arrivals awaiting registration, many of whom arrived in late September 2008. Refugee clan elders and committee members in Dhagahley and Ifo have confirmed a consistent influx of 200 to 300 new arrivals daily. The Dadaab camps were established in 1991-92, and were designed to accommodate 100,000 people, therefore the current surge is causing massive overcrowding.

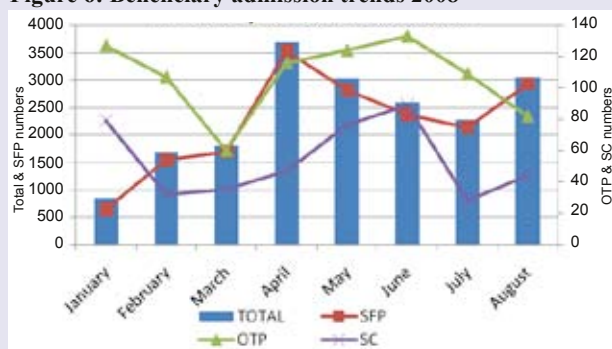
A rapid assessment in Dadaab refugee camp conducted by FSAU and FEWS NET from Oct 6 to 8, 2008 found that the majority of refugees originate from Mogadishu and the neighboring Elasha Biyaha area (Afgoi) and are comprised mostly of women, children and young teenagers. However, the assessment also revealed the extent of Somali's current food security crisis as it was discovered that refugees from various locations throughout central and southern Somalia, which include the Shabelles, the Jubas, Gedo, Bay, Bakool, Hiran, Mudug and Galgadud had all sought refuge at the camp. In addition, Somali refugees from the Ogaden region of Ethiopia have also migrated to Dadaab camp for assistance, and a smaller number of refugees from other parts of southern Somalia and Puntland have been identified in transit centers (Belet Hawa, Jilib, Sakow, and Dhobley).

Smaller numbers of Somalis have also fled to countries such as Yemen, Ethiopia, and Djibouti, with the promise of more security, better economic opportunities and social services and possible relocation to western countries. Although migration has become quite common over the past year, it is not without cost. Many people must sell their remaining productive assets such as their homes, land holdings, livestock, ox-carts and jewelry in order to raise the capital needed to successfully reach a refugee camp. In addition, those who choose to migrate risk injury and even death. Many Somalis have lost family members, particularly children, while migrating, due mostly insufficient food resources. The high cost of transportation is resulting in many not being able to complete the journey and having to stay in transit areas. In addition for those who do complete the migration, there are long delays in registration on arrival at the camps due to the large influx of refugees. This raises the vulnerability of new arrivals as they have no access to food, health, income or shelter during this period. Recent sharp increases in refugee numbers demonstrate the extent to which the food security situation in southern and central Somalia has deteriorated and highlights the need for urgent measures to halt the massive out-migration to refugee camps, where resources and services are already overstretched. Without adequate localized humanitarian assistance, the food security situation will continue to deteriorate within central and southern Somalia, which will undoubtedly force others to migrate.

The nutrition situation of the new arrivals at the Dadaab refugee camps may be described as unstable and precarious. This has become more apparent in recent months, with the increasing numbers of refugees arriving from Somalia (Figure 6). In the month of August 2008 for example a 35% (785) increase in admissions of malnourished children from July was reported, leading to a total of 3,054 beneficiaries in the program. The increase in admissions is attributed to an influx of acutely malnourished children, active case finding and referral by community health workers and improved SFP structures across the 3 camps. Over 80% of the admissions into the stabilization centre occurring since August '08 were new arrivals; this has especially been witnessed in Dagahaley camp.

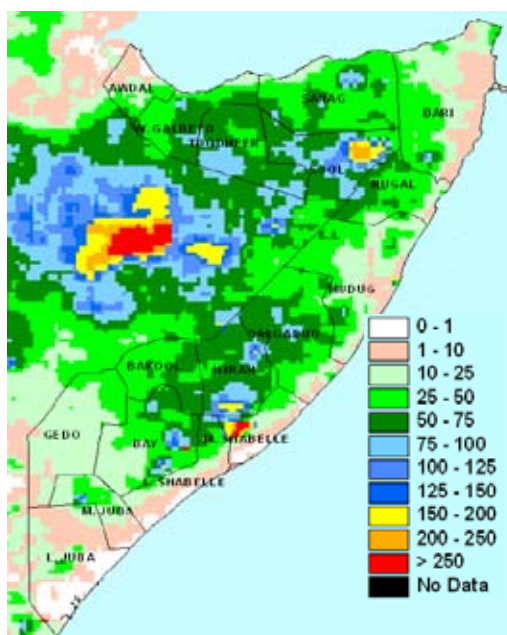
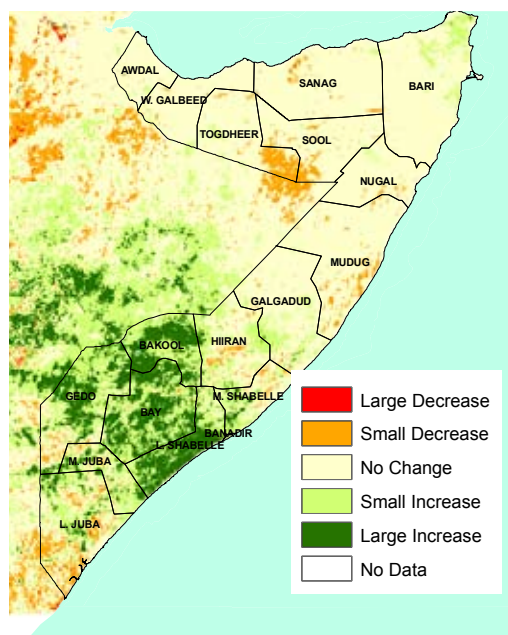
The health situation in Dadaab Refugee Camp has also been affected by the continuous influx of newly displaced persons. It is estimated that 80-120 sick children visit Dadaab health facilities on a daily basis. In terms of childhood illnesses, all three camps showed similar patterns with malaria, lower respiratory infection, and watery diarrhea accounting for the high morbidity burden among children less than five years of age. These are considered to be potential risk factors of acute malnutrition and anemia. The excessive case load of under one year old children requiring immunization services, coupled with a limited number of staff and increasing number of new arrivals, indicates a likelihood of increased demand for health services in the coming months.

Figure 6: Beneficiary admission trends 2008



Crowd awaits registration, Dhagahaley refugee centre, North Eastern Prince, Kenya, October 2008

SECTOR HIGHLIGHTS

Map 1: RFE cumulative (1-31st Oct 2008)Map 2: NDVI SPOT Anomaly 1-31st October

Sources: SPOT VEGETATION

CLIMATE

The *Deyr* '08/09 rains began in many parts of the country during late September and early October, demonstrating a timely onset to the short rainy season. The rains continued to fall in many parts of the country, including new areas of Mudug and parts of Bari region during the second dekad of October. Over the last twenty days, light to moderate rains ranging from 10 to 100 mm were received in most of the regions (Map 1). However, there were exceptions in Lower and Middle Juba regions, the Cowpea Belt of Galagadud and the coastal areas of Mudug, Galgadud and Middle Shabelle, where so far *Deyr* rains were below normal during October. Field reports indicate that during the first week of November rains were better in terms of intensity and coverage in these areas.

In the drought-affected central regions of Galgadud and Mudug, where serious water shortages have persisted for the last 18 months, localized rains were received during October in the Hawd and Addun pastoral areas as well as parts of the Cowpea Belt (up to 50mm). These rains slightly replenished some of the underground reservoirs (*berkads*) and improved browsing conditions especially in the drought affected areas, as shown in the NDVI anomaly map (Map 1). However, coastal and sub-coastal areas located in eastern Galgadud and southern Mudug regions still remain dry.

In the north, most of the regions received initial *Deyr* rains. Hawd of Togdheer and Hargeisa reported well distributed rainfall which minimized the scale of internal pastoral migration. In the northeast, satellite based rainfall images show and field reports confirm that the rains extended to parts of Bari and Nugal regions where moderate to good rains were received that boosted browse and eased water shortages. Good rains were reported in Sool and Sanaag regions in the last week of October. Compared to the long term mean, pasture and browsing condition in those regions is resuming to normal leading to pastoral migration towards their origins.

In the south, Hiran, Lower Shabelle, Bakool, Bay and parts of Middle Shabelle regions received substantial amounts of rain in October (60-130mm). Data from the rain gauges in Jowhar and Bula Burti recorded 100mm and 102mm of rainfall respectively with two and three rainy days each. Field reports confirm that the intensity and coverage of the rainfall in most of Hiran and Middle Shabelle region during the second dekad of October was largely normal. In the sorghum growing districts of Bay and Bakool regions, moderate to good rains were recorded. For instance, Baidoa and Dinsor rain gauges recorded 138mm and 52.8mm of rainfall with nine and eleven rainy days respectively, whereas those for Huddur and Wajid (Bakool region) recorded 106.5 mm and 196mm of rainfall for thirteen and nine rainy days respectively. Rains enhanced crop germination, recharged water catchments and improved browsing and grazing conditions in Bay, Bakool, most of Shabelle and parts of Hiran regions. Thus improved seed germination and crop growth.

In Middle and Lower Juba regions on the other hand, only light showers (less than 10 mm) are reported from inland pastoral areas. The riverine areas of Buale, Jilib and Jamame districts also reported intermittent light showers during most of the second Dekad. Normally rains intensify during the month of November. While it is too early to determine the overall impact of the rains, they have generally replenished catchments and improved pasture and rangeland conditions, especially in the drought affected regions of Mudug, Galgadud, Hiran and Bakool.

CIVIL INSECURITY

Current situation

During the last week of October, simultaneous attacks in Hargeisa and Bosasso on government, UN and diplomatic buildings have heightened security concerns in the region. In locations that were previously considered more secure, these new attacks further indicate a deteriorating situation. In addition this is the first time targeted suicide car bomb attacks have been reported, which introduces new concerns and fears for local communities and implementing agencies. In early November the kidnapping of ACF staff in Dhusamareb reinforced the difficulties and dangers of working in Somalia and this will once again impede the response of crucial humanitarian assistance. Sea piracy continues which has prompted an international response, causing additional disruption and fear for the local communities.

Throughout the remainder of Somalia, insecurity remains a significant concern with the continued road blocks, conflict and clan tension, banditry and political tension. Attacks on international agencies and local agencies are becoming more common. Main centres including Baidoa, Merka, Dhusamareb and Beletweyn remain volatile with a high degree of uncertainty and fear for the local populations. Current estimates (Sept '08) of the number of people displaced since January 2007 are over 900,000. Some reports from the field indicate resource based conflict in Juba due to pasture and water shortages but with recent rains this should be reduced or eliminated. Along the border with Kenya and Gedo there are reports of increased tension leading to displacement, due to the kidnapping of two nuns in El Wak.

Impact

The key impacts of the escalation of civil insecurity are the disruption of trade, the increased cost of transport and trade, reluctance of business people to invest, and in many cases the closure of shops. All of these will result in increased costs of food and non food items which will reduce access particularly for poor households and those who have been displaced. The additional instability in urban centres will result in more people being displaced and seeking refuge in the surrounding rural areas and therefore putting additional pressure on limited resources and reducing income opportunities and employment and reduced access to social services.

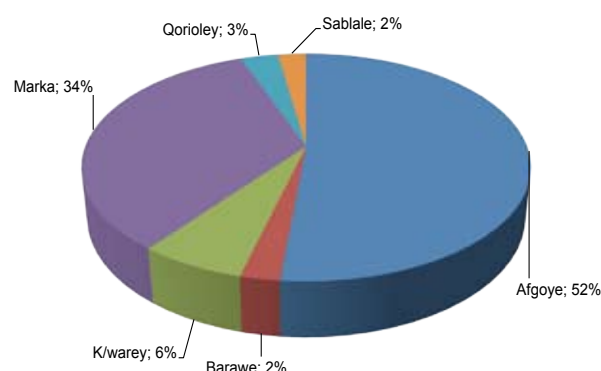
Access for aid agencies including local NGOs, is severely limited which will compound the crisis in many parts of Somalia, should vital assistance not reach beneficiaries, and will result in a slowdown of important life saving and livelihood protection interventions. Cross border movement between Kenya and Somalia for people, livestock and goods has stopped due to increased deployment of troops on both sides of the border will lead to further displacement.

AGRICULTURE

Most of the agricultural regions in the south received moderate, and in some places, heavy rains during the month of October. For example, most of Bakool, Gedo, Bay and parts of Shabelle regions recorded 50-100 mm of rainfall during the month. These rains have enabled crops to germinate and establish normally. The continuation of rains into November will be critical for crop growth.

Where there is good rainfall and crop establishment, income opportunities for poor households have improved. Agricultural activities, such as sowing and first and second weeding are ongoing. In addition, in Lower Shabelle region, ongoing off-season crop harvesting (maize, cowpea and sesame) and de-silting of irrigation canals as cash for work has also improved income opportunities. During the Post *Gu* seasonal assessment off-season production was estimated at 12,000MT. This off-season crop cultivation benefitted from good rains in late May and June. Heavy rains in early September were beneficial to standing crops and increased the yield per hectare. However, these rains also caused damage to some standing off-season crops, particularly sesame, maize and the inter-cropping cowpea, mainly in Brava district of Lower Shabelle. Heavy rains in

Figure 7: Percent Contribution of Off-Season Production by District



the region in September destroyed an estimated 2,760 ha of maize or about 9% of the estimated area (30% of this is from Brava), 400 – 500 ha of cowpea as an inter-crop (8% of the planted area), and about 70% of the sesame cropped area, mainly from Kurtunwarey. Standing off-season crops are currently at the final stage of harvesting.

Table 1: Off-season Maize production Estimates per District

Districts	Cowpea		Sesame	
	Ha	prod.(Mt)	Ha	prod.(Mt)
Afgoye	2,400	720	500	50
Barawe	100	10	100	10
K/warey	500	50	2000	400
Marka	1,500	150	1000	100
Qorioley	500	75	400	40
Sablale	130	10	600	120
Total	5,130	1015	4600	720

Table 2: Off-season Cowpea and Sesame Production Estimates per District

District	Area harvested	Maize Production (Mt)
Afgoye	11,968	9,574
Barawe	800	448
K/warey	3,000	1,200
Marka	9,000	6,300
Qorioley	3,000	600
Sablale	750	450
Total	28,518	18,572

Findings from the FSAU and partners off-season assessment conducted in late October estimate total off-season cereal production at 18,500MT of maize, which is 54% above the post *Gu* projected estimates. This cereal (maize) off-season production, combined with the *Gu* '08 cereal production in southern Somalia, represents 72% of *Gu* Post War Average (PWA) and 100% of 5-year average. More than half of this off-season maize production came from Afgoi and 34% from Merka. Cowpeas were planted as an inter-crop with maize during the off-season period. Its production is estimated at 1,015MT, with 71% coming from Afgoi (Table 1 and 2 and Figure 7). The increases are attributed to good rains in August and early September.

As of mid November, flooding has been reported in three areas. In the Lower Shabelle, around Kurtenwary, and since June '08, an estimated 3,000 – 4,000 ha have been inundated with flood waters affecting 8 villages due to the river embankments being in poor condition. High river levels along the Juba, as a result of heavy rains within the region and in the Ethiopian highlands, have caused flooding in Dolo and Bardera. Overflow due to high river levels have filled *desheks* in Jilib and Jamame districts. The *desheks* are now near full capacity and a further increase in river levels will result in flooding. While there are short term negative impacts, such as roads and villages cut off, this type of flooding does offer opportunities for recessional planting, increased fishing and an improvement of pasture and browsing. If heavy rains in Somalia and the Ethiopian highlands continue, river levels will stay high and additional agricultural areas will be threatened by floods in the coming weeks, however current forecasts and reports indicate that river levels will decrease.

In the northwest, crop establishment production estimates were below average due to below normal and unevenly distributed *Gu* '08 rains in the agro-pastoral areas of Awdal, West Galbeed and Togdheer regions (Post *Gu* '08 Technical Series Report). However, good *Karan* rains received since late July improved crop performance. Field reports indicate that production is expected to be higher than forecasted during post *Gu* '08 assessment. Crop harvesting started in some parts of the region in late October. FSAU and partners will carry out a post *Gu/Karan* crop harvest assessment in December '08.

Local cereal prices have decreased by 25% to 45% in the maize producing areas and by 20% to 30% in sorghum producing areas since July '08 (Figure 8). Cereal prices vary among main markets in southern Somalia with the lowest maize prices recorded in Qoryole (6,531/kg) and Jamame (7,583/kg). The lowest sorghum prices are in Baidoa (6,425/kg). The lower prices are due to good off-season maize production, the overall decrease of imported commodity

Figure 8: Regional Trends in Cereal Prices (SoSh)

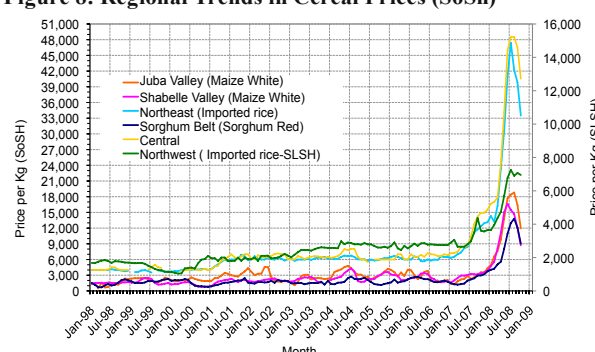
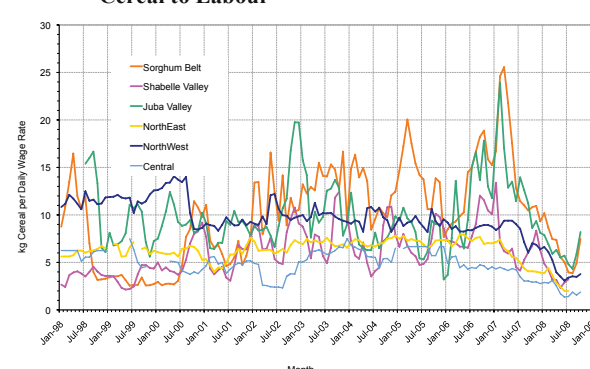


Figure 9: Regional Trends in Terms of Trade Cereal to Labour



prices, food aid distributions in the region, and the good start to the seasonal rains. Maize prices in the Juba regions have similar trends. In the Sorghum Belt, October sorghum prices are 19% and 25% lower than in September and July '08 due to average *Gu* '08 cereal production and food aid. However, the current price of local cereal prices is still at an all time high.

In northwest agro-pastoral areas, maize prices are 17% lower (SISh 7, 000 – SISh 6, 000/kg) than prices in July 2008. This is due to increased supply from the Somali region of Ethiopia, a small *Gu* '08 maize harvest in the northwest, an early harvest of *Gu/Karan* '08 sorghum (short cycle) and an overall decrease in commodity prices.

Agricultural activities associated with the *Gu* '08 off-season and *Deyr* '08/09 season have resulted in increased employment opportunities and a significant increase of labour wage rates and purchasing power for poor households. Terms of trade (cereal/day labour wage) in southern Somalia increased by 50% to 130% since July, but they are still very low. The increase of terms of trade between cereal and daily labour wage is due to the decrease of local cereal prices, the available job opportunities including the cash for work (rehabilitation of canals in Lower Shabelle) and increase of labour wage rates. Terms of trade in the Juba regions have similar trends and are higher by 39% compared to September '08 and 71% higher than in July '08. In the northwest, terms of trade have increased slightly by 8% since July '08 (Figure 9).

LIVESTOCK

Deyr 08/09 rains have started early with normal intensity in most parts of the country, including the drought and rain deficit pastoral areas reported during the *Gu* '08 assessment (see Climate section). These rains have significantly improved both pasture regeneration and have replenished *berkads*, water catchments, natural bunds and shallow wells. They have also alleviated water shortages, and as a result the cost of water has declined significantly compared to last month. However, the coastal districts of Middle Shabelle, Juba and Galgaduud regions only received localized rains with poor intensity during early October and this was followed by a two week dry spell.

The Hawd/Addun pastoral and the Cowpea Belt of Galgaduud region received near normal rains which has moderately improved pasture regeneration but has not replenished water catchments. If rains do not improve in the next two months, Galgaduud pastoralists will have to migrate to neighbouring Ogaden region of Ethiopia which received good *Deyr* rains. Intra-district and regional movements were observed in all livelihoods. Boreholes in "Kalowle" in the Guban livelihood zone of Lughaya district/Awdal region which normally doesn't receive *Deyr* rains, has not been functioning over the past three months and dependent pastoralists migrated to the neighbouring districts.

Overall, livestock body conditions have improved although those animals affected by the harsh, dry *Hagai* and drought are only now starting to gain strength. It has been reported that a small number of weak small ruminants and cattle in the central, northeastern and Hawd of Togdheer regions, died following heavy cold rains at the start of the *Deyr* season. Drought related diseases were still observed but the incidence is declining. In Juba, cattle body conditions have deteriorated due to the prolonged *Hagai* dry spell and then following poor rainfall at the beginning of the *Deyr*. Milk production remains poor in all livelihood zones due to low calving and kidding rates during *Gu* '08 because of low conception for all species during the past three poor seasons (*Gu* '07, *Deyr* '07/08 and *Gu* '08). However, there

Figure 10: Berbera Livestock Export (Heads) and Export Quality Goat Prices (US\$)

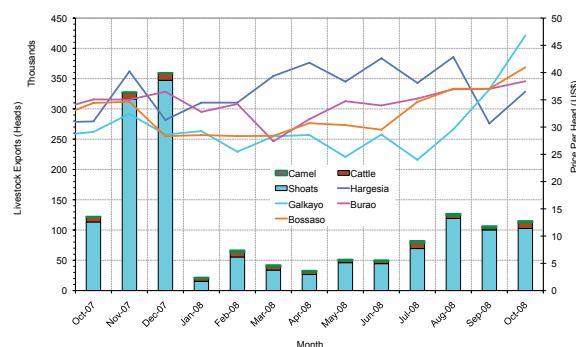
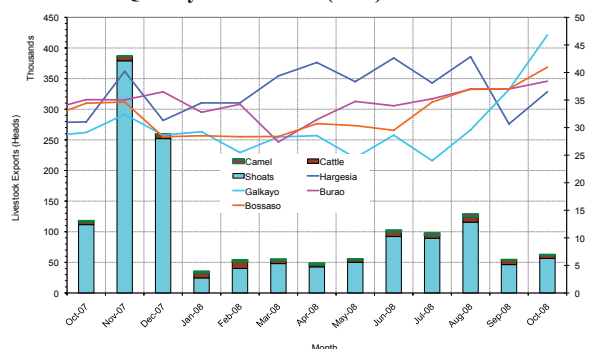


Figure 11: Bossaso Livestock Export (Heads) and Export Quality Goat Prices (US\$)



Intra-Regional Livestock Movement, Awdal and Galbeed Regions - Oct. '08

are few camels that have not yet ended their milking period and they are expecting to increase milk yields. In contrast, in Shabelle, Bay and Bakool, where medium camel calving was reported during *Gu* '08, milk production has improved. High cattle calving rates have been reported in Juba, yet there was low milk production due to limited access of pasture and water. It is expected that camel and cattle milk production will improve as rains intensify in November. Access to marketable animals for all wealth groups is going to improve following improved livestock body condition, in all Livelihood Zones.



Small ruminants killed by the torrential rains in Bari region, Dharoor valley/Iskushuba/Bari, Oct. '08

Generally, livestock prices have increased in the north-west, northeast, Juba, Shabelle, Sorghum belt and Central regions during the month of October, while the northeast region has experienced a decline in the price of local quality goats. Compared to September '08 and October '07 respectively, cattle prices have increased by 25% and 274% in the Shabelle regions and 5% and 71% in the Juba regions. In the northeast, goat prices declined due to the slight strengthening of the SoSh against the dollar and poor body conditions due to the drought. Total livestock exports from Bossaso increased by 15% between September and October (from 54,518 to 62,774 head) and total Berbera port increased by 8% (from 106,418 head to 114,832). Bossaso export figures, however, have decreased drastically by 51% from August to October (from 129,059 to 62,774 head) while Berbera shows a slight decline of 9%. In addition to the export of live animals, Burao slaughter house carcass exports decreased by 43% (from 16,980 to 9,740 carcasses) compared to September '08 but increased by 86% compared to Oct '07 (5,235 carcasses). This increase or decrease of meat exports were governed by the demand of consumers in Dubai (Figure 10 and 11).

Overall, Terms of Trade (ToT) in Somalia have significantly increased when compared to September. In the Sorghum Belt, Shabelle and Juba regions, average ToT (cereal to cattle) significantly increased by 70%, 72% and 54%, respectively. ToT (local quality goat to sorghum) of drought affected central regions has also significantly increased by 55% when compared to last month.

MARKETS AND TRADE

Markets in southern Somalia have been in disarray for the last six months due to the prolonged conflict, rising global food and fuel prices, political instability, and uncontrolled and excessive printing of the Somali Shilling. While the shilling lost value by 55% from Jan '08 to Oct '08 in the Bakara market, it has remained relatively stable compared to the USD over the last month devaluing by only 4% from Sept. 08 (SoSh 34,000) to Oct. 08 (Sosh 35,225). However the shilling is still at about half its value when compared to the five year average. Similar trends were observed in other southern Somalia markets (Table 3 and 4 and Figure 12). The Somaliland Shilling has remained relatively stable, although it lost value slightly from SISH 6,000 per dollar in Jan '08 to SISH 6,250 in October '08, representing a depreciation of 4%.

Figure 12: Shabelle Valley, Imported Commodity Prices compared to Exchange Rate

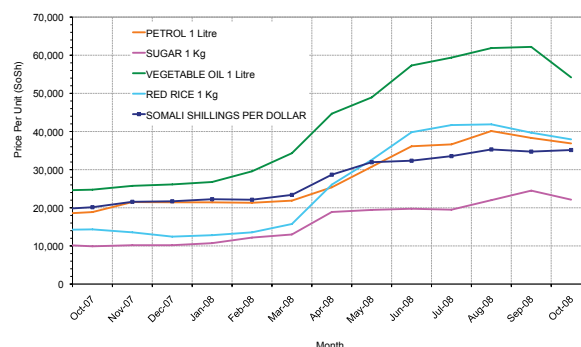


Table 3: Percentage Price Changes, Jan. - Oct. '08

	Rice	Sugar	Petrol	% SoSh devaluation
Juba	218	116	93	58
Shabelle	196	106	72	58
Sorghum belt	182	93	82	58
Central	143	73	98	49
Mogadishu	170	94	63	55
Northeast	134	78	102	48
Northwest	90	22	37	4

Table 4: Percentage Price Changes, Sept - Oct '08

	Rice	Sugar	Petrol	% Somalia devaluation
Juba	-3	-3	5	3
Shabelle	-4	-10	-4	1
Sorghum Belt	-16	-9	-7	0
Central	-13	-10	-7	-1
Mogadishu	-	-	-	-
Northeast	-16	-7	-2	-1
Northwest	-2	-4	0	2

The value of the shilling can be related to supply and demand. Factors that are currently affecting the exchange rate are the increased demand for dollars to cover the cost for those attending the *Haj* and the increased supply of dollars from the diaspora. Also livestock export traders inject dollars into the market to exchange for Somali shillings to purchase more livestock during the pre *Haj* period. Furthermore, there are reports that the printing of the Somali shilling has stopped and in some areas there is a refusal to use the new notes. Up until last month the decreased value of the shilling and the increase of global food prices have been driving the sharp increases in imported commodity prices. As a result, the demand for imported items has declined.

While prices of imported commodities such as rice, sugar, cooking oil and petrol have increased significantly in all markets from Jan '08 and Oct '08, prices generally remained stable over the last month and in many cases even declined. Due to *Deyr* rains, many roads are expected to be impassible in the coming weeks, therefore imported commodity prices will likely increase in the coming months.

NUTRITION SITUATION

In October, FSAU conducted two representative nutrition surveys in the northwest region; one in the west Golis Guban livelihood which runs along the coastal areas in Galbeed and Awdal regions, and the other in the Sool plateau of Sanaag region. These surveys were an output from the Niphorn (Nutrition Information for the Horn of Africa) project funded by UNICEF, and under the technical leadership and coordination of FSAU, which is promoting capacity building of the Somaliland Ministry of Health and Labour in nutrition surveillance.

The results from the **Golis/Guban** livelihood zones assessment indicates a **Very Critical** situation, with a global acute malnutrition rate (GAM <-2 WHZ or oedema) of **20.7%** (CI: 15.3-26.2) and a severe malnutrition rate (<-3 WHZ or oedema) of **2.4%** (CI: 1.36-3.5), with 1 (0.19%) oedema case observed. This is deterioration from the Post Gu'08 **Critical** nutrition situation in which integrated analysis of the situation was based on rapid mid upper arm circumference and health facility data. The factors driving this very alarming nutritional situation are likely linked to high rates of disease (37% of children reported to be ill, with 29% reportedly having suffered from Diarrhea and 17% from acute respiratory tract infections), and other shocks which have led to reduced household food security such as the ongoing high food prices and the significant numbers of livestock deaths earlier this year.

The **Sool Plateau** nutrition assessment conducted in October 2008, indicates an **Alert** nutrition situation, with global acute malnutrition rate (GAM <-2 WHZ or oedema) of **9.9%** (CI: 6.8-13.0) and severe malnutrition rate (<-3 WHZ or oedema) of **0.2%** (CI: 0-1.08), no oedema cases were observed. This is an improvement from the Post Gu'08 **Critical** nutrition situation, likely associated with increased access to humanitarian assistance (including cash for work and water trucking) and to milk following the September-October rains that have been a pull factor to livestock which out-migrated to Puntland during the *Gu* '08. Nevertheless morbidity was high with 23% of the assessed children reportedly having suffered from a communicable illness in the preceding 2 weeks to the survey, 16% from Diarrhea and 8% from acute respiratory tract infections.



Weight measurement using a Uniscale, FSAU Sool Plateau, Oct. '08



MUAC measurement, FSAU West Golis Oct. '08

Detailed analysis of the two assessments has been shared in the November 2008 Nutrition Update. Availability of nutrition information from other sources remains a challenge, with the deteriorating security situation; this is particularly the case for feeding centres statistics given the suspension of programmes in some cases and reduced coverage in others.

Three additional nutrition assessments have been conducted in the Shabelle regions in the agro-pastoral, and the riverine livelihood zones and in the IDPs groups in Afgoye and Merka, in late October-November 2008 by FSAU and partner agencies. Results will be available in late November. In November a further six surveys are planned, two in the main livelihoods in Central regions (Hawd and Addun) three in the main livelihoods of Gedo region (agro-pastoral, pastoral and riverine) and one in the Bossasso IDP settlements.

Acute Watery Diarrhoea (AWD)—*Highlights from the Somalia Health Cluster October 2008 Bulletin 16*

A cholera outbreak in Merka/Lower Shabelle illustrates a decreasing trend in admissions to the cholera treatment center (CTC) in the past weeks, from an average of 8 to 4 cases a day. This trend is mainly due to effective control measures. Since the onset, August 13th until October 31st, a total of 532 patients including 8 related deaths have been admitted to the CTC. 62% of the admitted cases were children aged under 5 years. The Case Fatality Rate (CFR) is 1.5% and indicates adequate case management and prompt referral to the CTC.

Between September 6th and October 31st 2008, a total of 300 cases of AWD, including 8 deaths were reported from Bossasso/Bari region. Children under the age of 5 years account for 51% of all admissions. The overall CFR dropped from an initial 3.7% to 2.7%. A recent assessment by WHO showed shortcomings in case management and delays in referral to CTC due to poor public awareness to be the main cause of the elevated CFR. The AWD taskforce has emphasized the urgent need for strengthening health education on hygiene and sanitation, and is scheduled to hold an AWD case management training of partners.

Detailed information in the *Somali Health Cluster Bulletin No. 16*.

Recent and forthcoming publications and releases

FSAU/FEWSNET Market Data Update, November 2008

FSAU/FEWSNET Climate Data Update, November 2008

FSAU Nutrition Update, July - August, 2008

FSAU Special Brief, September 12, 2008

FSAU Technical Series Report, Post Gu '08 Analysis, October 15, 2008

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



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