

This special FSNAU brief provides a summary of the key findings of the post *Deyr* 2011/12 Assessment and Analysis, which are the result of fieldwork (21 Dec 2011 – 3 Jan 2012); a national analysis workshop (10 – 21 January 2012); and a Technical Verification and Partner Vetting Meetings (Nutrition, 24 January 2011 and Food Security, 26 January 2011). FEWSNET-Somalia along with 126 partners, including regional authorities, WFP and other UN and international agencies, and local and international NGOs participated and supported in this post *Deyr* 2011/12 assessment and analysis process. FSNAU presented these results in Nairobi at a Special Meeting on 3 February 2012 and issued a Technical Release on the same day with the key findings. The Technical release and presentation are available on the FSNAU website (www.fsnau.org).

KEY FINDINGS

FSNAU, FEWSNET and partner post *Deyr* 2011/12 seasonal assessment results indicate that Famine outcomes no longer exist in southern Somalia, **yet nearly a third of the population remain in crisis, unable to fully meet essential food and non-food needs.** Based on the assessment findings, Mogadishu IDPs, Afgoye IDPs, and agropastoral households in Middle Shabelle (populations formerly classified as IPC Phase 5 – Famine) have now improved to Emergency-level food insecurity (IPC Phase 4). This is the result of substantial humanitarian assistance provided and the *Deyr* harvest, which is substantially higher than average. Both factors have mitigated the extreme food deficits and reduced mortality levels. Nonetheless, as of 3rd of February, **2.34 million people remained in crisis, with 73 percent (1.7 million) residing in the southern regions.** In the most-likely scenario, **the number of population in crisis is projected to increase up to 2.51 million people in February-June 2012.** The increase is anticipated in agropastoral areas of Lower Shabelle and Bay regions where populations are likely to embark on accelerated sales of livestock assets to meet the minimum food/non-food needs when the benefit of the current harvest will be reduced. Multi-sectoral response, at scale, is required for all those in crisis and any significant interruption to humanitarian assistance or trade could result in a reversal of the gains made.

The improvement in food security outcomes in the South is largely due to the substantial multi-sectoral humanitarian assistance and outcomes of favourable *Deyr* season, which led to sizeable crop harvest, reaching 200 percent of the post-war average, increased farm labour opportunities, improved livestock production and reproduction, reduced food prices and strengthened purchasing power of the population. However, areas in southern Somalia such as flood-affected Juba and Gedo riverine, poor cattle pastoralists in Juba and Shabelle regions and pastoralists in coastal areas of Middle Shabelle with reduced herd numbers due to past droughts, as well as agropastoral areas of Middle Shabelle (cowpea) and Hiran, with minimal food production (crops and livestock) and dwindled livestock assets remain in **Emergency** (IPC Phase 4).

The massive scale-up of emergency response since September/October has also had a significant impact on food access, acute malnutrition, and mortality levels. Among Mogadishu IDPs, the level of acute malnutrition has dropped from 45 percent in August to 20 percent in December. Death rates have declined since August but remain at the Famine threshold of 2 deaths per 10,000 population per day, highlighting the continued impacts of the 2011 famine and insecurity. Due to security restrictions, updated nutrition and mortality data was not collected in December for other regions of Southern Somalia. However, indirect information from health centers and feeding programmes suggests an improved situation from August 2011, though acute malnutrition levels likely remain higher than 20 percent. Two regions are of particular concern. In Lower Juba and Bakool, high numbers of acutely malnourished children continue to be reported and access to treatment services remains severely restricted.

Climate

Markets

Nutrition

Agriculture

Livestock

**Civil
Insecurity**

**Emerging
Regional
Issues**

**Integrated
Food Security
Analysis**

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An estimated 325,000 acutely malnourished children are currently in need of specialized nutrition treatment services in Somalia, 70 percent of whom are in southern regions.

In the central and northern regions, most areas also benefited from good rains (*Deyr* and *Karan*), which led to both improved pasture conditions, considerable harvest in agropastoral areas, particularly in the Northwest, improved livestock prices and strengthened purchasing power, with the exception of coastal pastoral populations who remain in **Emergency** (IPC Phase 4). Currently 95,000 rural people are estimated in **Emergency** and 195,000 people in **Crisis** (IPC Phase 3) in these regions. The majority of those are poor pastoralists who have yet to recover their herd sizes following the consecutive seasons of poor rainfall and require emergency livelihood support at scale. Livestock exports through northern ports continue their positive trend since the lifting of the livestock export ban in 2009, with the highest exports recorded in 2011 to date.

The situation has also improved in urban areas although **over half a million of urban people remain** in crisis. The improvements are attributable to reduced cost of living, particularly in the South, improved security situation in Mogadishu, which increased activities at the city's port and trade activities, as well as reduced competition for labour and social support from rural areas where the crisis has tapered. However, poor segments of the urban population in Mogadishu and Juba regions still remain in **Emergency** struggling to meet their food needs through a combination of moderate to very severe coping strategies, where high malnutrition rates are evident.

In the most-likely scenario, FSNAU/ FEWS NET assume that the April-June *Gu* rains will be average. However, risk of a poor season remains, and populations in southern regions continue to be extremely vulnerable to both price and rainfall shocks following the devastating effects of the recent famine. Any additional shocks, including a continuation or expansion of humanitarian access restrictions, poor *Gu*-season rainfall, additional displacement, disease outbreaks, trade restrictions, or large-scale return of refugees from Kenyan and Ethiopian refugee camps, could cause a rapid degradation of the food security situation in this time period.

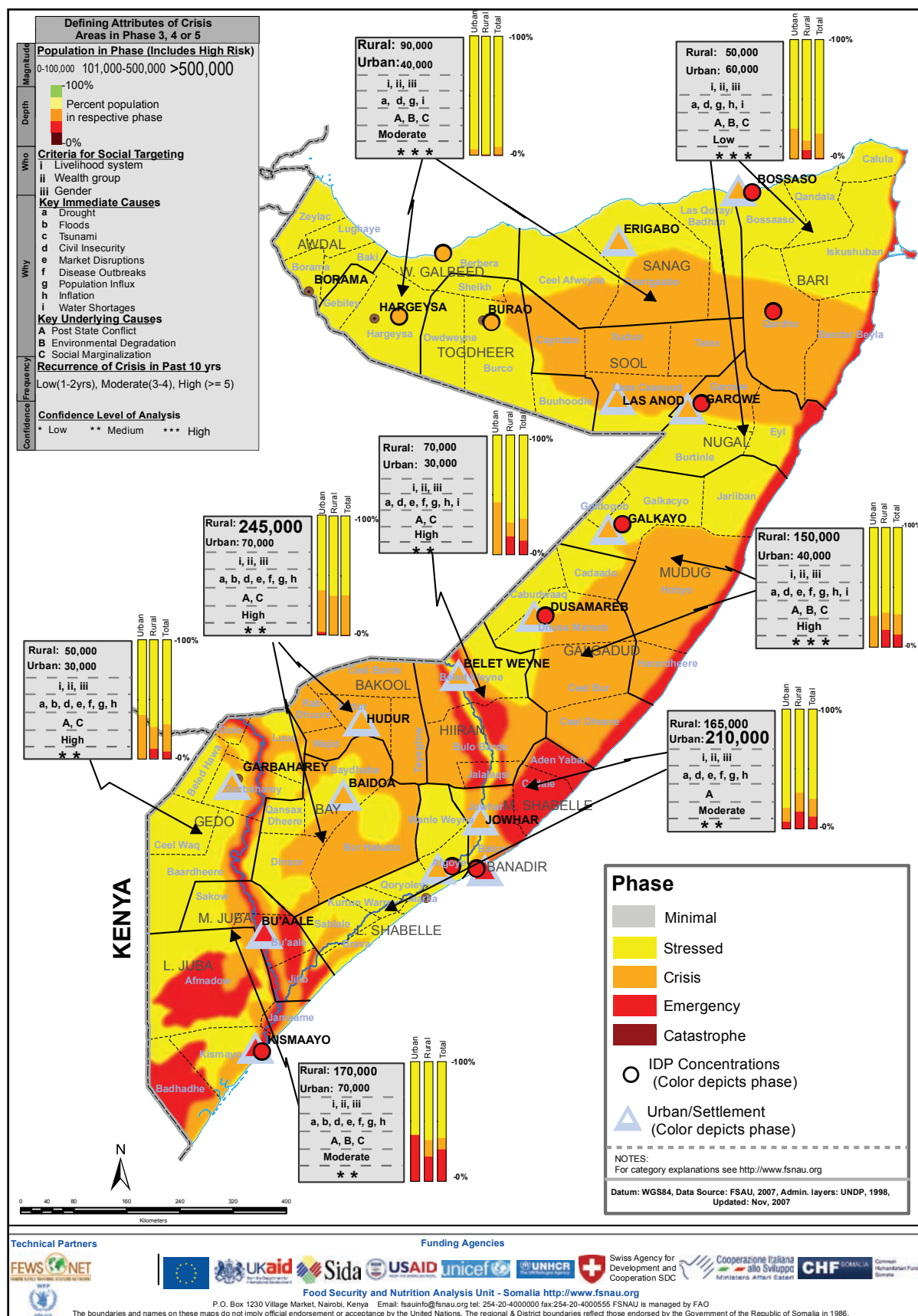
Table 1: Somalia Integrated Food Security Phase Classification, Population Numbers, Feb-June 2012

Region	UNDP 2005 Total Population	UNDP 2005 Urban Population	UNDP 2005 Rural Population	Urban in Stressed	Rural in Stressed	Urban in Crisis	Rural in Crisis	Urban in Emergency	Rural in Emergency	Total in Crisis and Emergency as % of Total population
North										
Awdal	305,455	110,942	194,513	35,000	40,000	0	0	0	0	0
Woqooyi Galbeed	700,345	490,432	209,913	220,000	45,000	0	0	0	0	0
Togdheer	402,295	123,402	278,893	55,000	55,000	0	15,000	0	0	4
Sanaag	270,367	56,079	214,288	20,000	25,000	25,000	35,000	0	10,000	26
Sool	150,277	39,134	111,143	5,000	5,000	15,000	20,000	0	5,000	27
Bari	367,638	179,633	188,005	40,000	20,000	40,000	35,000	0	0	20
Nugaal	145,341	54,749	90,592	5,000	10,000	20,000	10,000	0	5,000	24
Sub-total	2,341,718	1,054,371	1,287,347	380,000	200,000	100,000	115,000	0	20,000	10
Central										
Mudug	350,099	94,405	255,694	10,000	45,000	20,000	25,000	0	30,000	21
Galgaduud	330,057	58,977	271,080	10,000	55,000	20,000	40,000	0	30,000	27
Sub-total	680,156	153,382	526,774	20,000	100,000	40,000	65,000	0	60,000	24
South										
Hiraan	329,811	69,113	260,698	0	10,000	30,000	35,000	0	40,000	32
Shabelle Dhexe (Middle)	514,901	95,831	419,070	0	20,000	15,000	80,000	15,000	75,000	36
Shabelle Hoose (Lower)	850,651	172,714	677,937	0	125,000	70,000	90,000	0	5,000	19
Bakool	310,627	61,438	249,189	20,000	60,000	20,000	140,000	5,000	0	53
Bay	620,562	126,813	493,749	35,000	40,000	45,000	200,000	0	0	39
Gedo	328,378	81,302	247,076	30,000	30,000	30,000	50,000	0	15,000	29
Juba Dhexe (Middle)	238,877	54,739	184,138	0	5,000	0	35,000	25,000	50,000	46
Juba Hoose (Lower)	385,790	124,682	261,108	0	15,000	0	40,000	45,000	45,000	34
Sub-total	3,579,597	786,632	2,792,965	85,000	305,000	210,000	670,000	90,000	230,000	34
Banadir	901,183	901,183	-	195,000	-	50,000	-	60,000	-	12
Grand Total	7,502,654	2,895,568	4,607,086	680,000	605,000	400,000	850,000	150,000	310,000	23

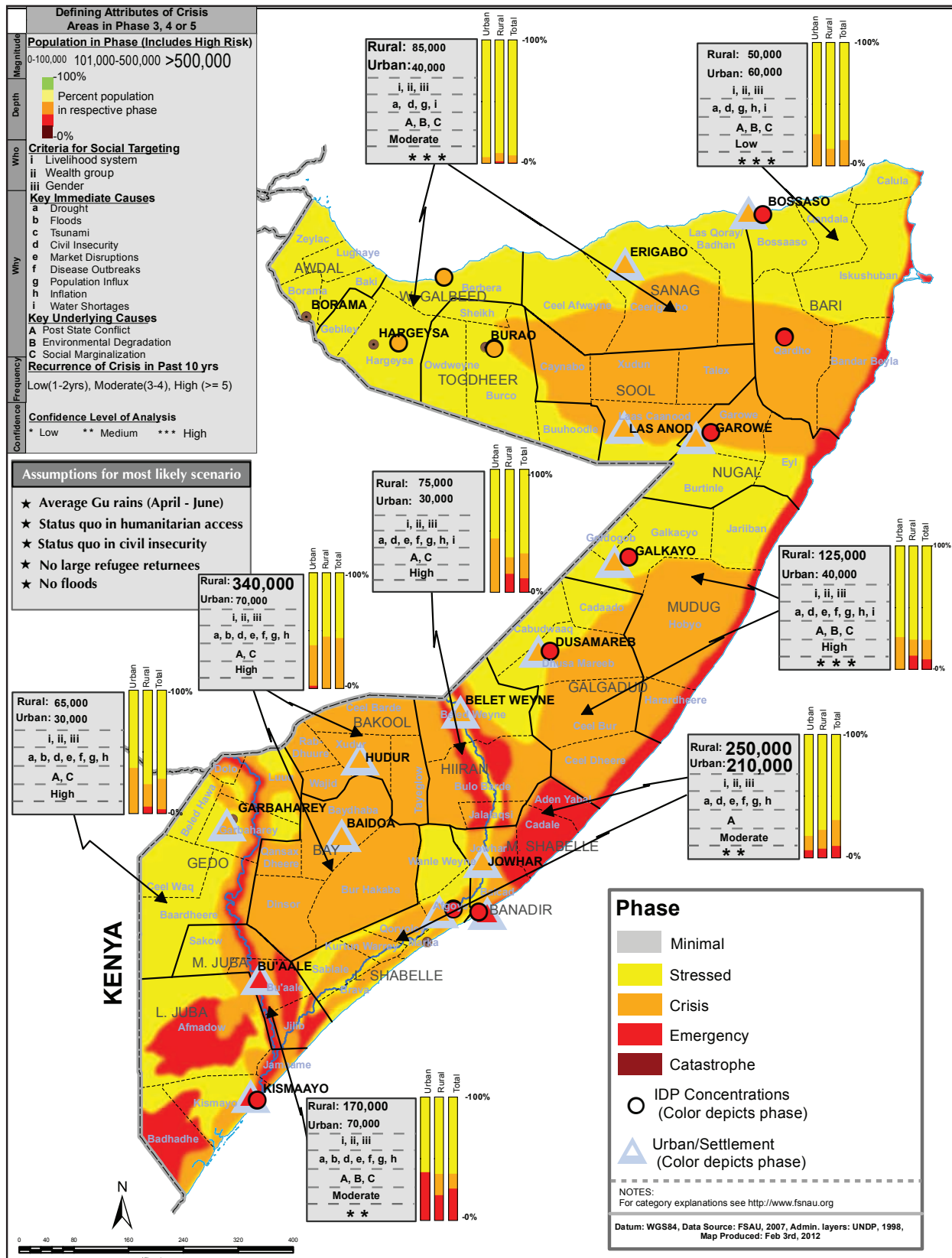
Assessed and Contingency Population in Crisis and Emergency	Number affected	% of Total population	Distribution of populations in crisis
Assessed Urban population in Crisis and Emergency	550,000	7	22%
Assessed Rural population in Crisis and Emergency	1,160,000	15	46%
IDP in settlements* (out of UNHCR 1.3million) to avoid double counting	800,000	11	32%
Estimated Rural, Urban and IDP population in crisis	2,510,000	33	100%

*Bossasso, Berbera, Galkayo, Hargeisa, Garowe, Kismayo, Afgoye, Mogadishu and Burao

Map 1: Somali Acute Food Insecurity Situation Overview
Rural and Urban Populations: February 3rd 2012



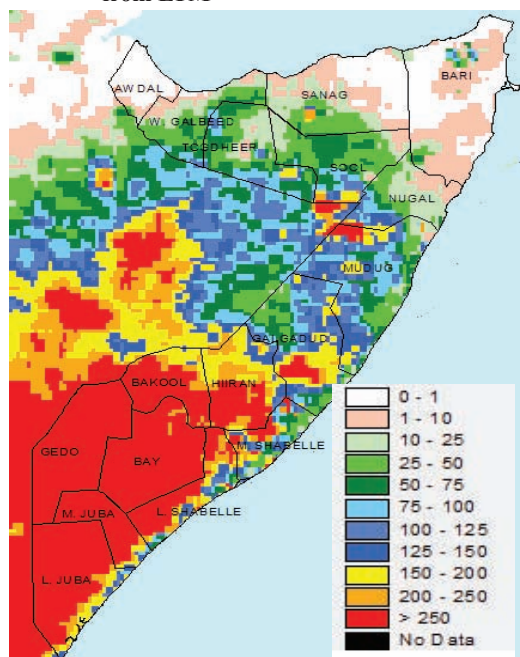
Map 2: Somalia Acute Food Insecurity Situation Overview
Rural and Urban Populations: February - June, 2012 Most Likely Scenario



SECTOR HIGHLIGHTS

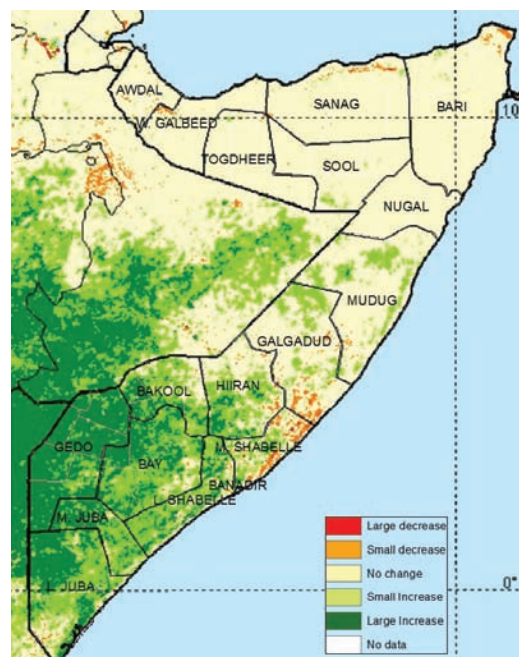
CLIMATE

Map 3: Percent of Normal Rainfall Oct-Dec 2011 from LTM



Source: National Oceanic and Atmospheric Administration (NOAA)

Map 4: December 2011 NDVI Difference from LTM



Source: National Oceanic and Atmospheric Administration (NOAA)

Rainfall Performance

The overall *Deyr* 2011/12 seasonal performance was extremely good in most parts of South/Central and parts of northern Somalia, with above normal rainfall recorded. In contrast, rainfall amounts were below normal in most of the key pastoral and agropastoral zones in the North, Coastal *Deeh* of Central and Middle Shabelle regions. The overall favourable seasonal performance this *Deyr* is associated with the Indian Ocean Dipole, i.e. cooling sea-surface temperatures in the Oceanic Island between Asia and Australia, and the warming up temperatures in Eastern Africa between 20-24, August 2011.

In the northern regions, the *Deyr* seasonal precipitation varied in temporal and spatial distribution in the month of October, which was followed by dry spells in November-December 2011 (Map 3). Both the satellite based rainfall estimates and ground information confirmed light to moderate rains in September-October. However, most parts of Sanaag, Sool, Bari, Awdal and eastern parts of Nugal received light showers at the start of the season but remained dry throughout November/December 2011.

In the Central regions of Galgaduud and Mudug, the overall rainfall performance was average to above average in terms of the amounts as well as temporal and spatial distributions. However, light to moderate rains were reported in October-November, in parts of Coastal *Deeh* of Hobyo and Elder districts, as well as in the Hawd of Dhusamareeb Beletweyne district. Therefore, Central regions remained dry throughout December 2011.

In the Southern regions, above normal rains (of 150-300% LTA) were received throughout all the livelihoods during the season, while it was 80-120 percent of normal in parts of Middle Shabelle and Bakool (Map 3). Between October and December, majority of the drought affected regions in the South received over 250 mm of rainfall. However, the northern parts of Hirran and Bakool regions, as well as the coastal areas of Shabelle and Juba recorded medium cumulative rainfall of 100mm-200mm (analysed jointly with FEWS NET).

Vegetation Conditions

The NDVI difference map for December 2011 depicts above normal biomass conditions in most areas of Somalia (Map 4). However, a small decrease in vegetation cover was evident in the 3rd *dekad* of December in the agropastoral areas of Elder (Galgaduud), Adale and Aden Yabal (Middle Shabelle), South-East Pastoral of Badadhe (Lower Juba) and small pockets of Alula district in Bari region as well as in the riverine areas of Merka district. Small decreases in vegetation cover are also observed in the North in parts of Golis, Nugal Valley and Sool Plateau livelihoods. Further deterioration is expected in most of the key pastoral areas during the dry *Jilaal* period (January-March 2012) (Source: FEWS NET).

Climate Outlook for the coming *Gu* 2012 season

According to FEWS NET's East Africa seasonal rainfall outlook analysis which typically considers the IRI Multi-Model Probability Forecast, the ECMWF Seasonal forecast, and the NOAA Canonical Correlation Analysis forecast. As of January 2012, all three forecasts have low skill for the March-May period, meaning that they suggest equal probabilities of below-normal, normal, and above normal rainfall. The Greater Horn of Africa climate outlook will be released in the last days of February 2012 and seasonal progressions will be updated accordingly. (Source FEWS NET)

CIVILINSECURITY

Civil insecurity remains one of the key contributing factors to the current food and livelihood insecurity in Somalia. This is demonstrated by the continued displacements, constrained access to humanitarian support as well as trade and market activities in the conflict prone regions of the South and Central regions. Conflicts between the Transitional Federal Government (TFG) and its allies-African Mission and anti-TFG militias continued in the South and Central. The security situation in Mogadishu (the key epicenter of violence), has improved since August 2011 after the pullout of the Al-Shabaab forces. However, certain parts of the city still experience sporadic fighting between the warring parties. The improving situation in Mogadishu since August led to increased access for the humanitarian agencies resulting in increased operation of the city port and airport facilities.

Conversely, in Hiran, Gedo and Juba regions the security situation has been worsening since late October 2011 following the military incursion by Kenya and Ethiopia in support of TFG, giving rise to disruption of livelihoods in the affected areas. Although other parts of the South remain relatively stable, tension is reported in some parts of Bay and Bakool regions as preparations for military actions amongst the warring groups are under way.

In the Central, the security situation remains precarious as the warring parties - pro and anti TFG elements - continue with their violent operations in Galgaduud. In the rural areas, clashes over ownership and access to rangeland resources persist in parts of Bari, Galgaduud regions and Sool regions.

A key outcome of civil insecurity is population displacement. Nearly 1.36 million people are currently displaced in the country. Majority of the displaced population are found in South and Central. Other effects are reflected in the disrupted economy, restricted market and trade activities, restriction of movements particularly, Hiran (Beletweene), Juba, Gedo, parts of Central regions and limited humanitarian access in south and Central parts of Somalia

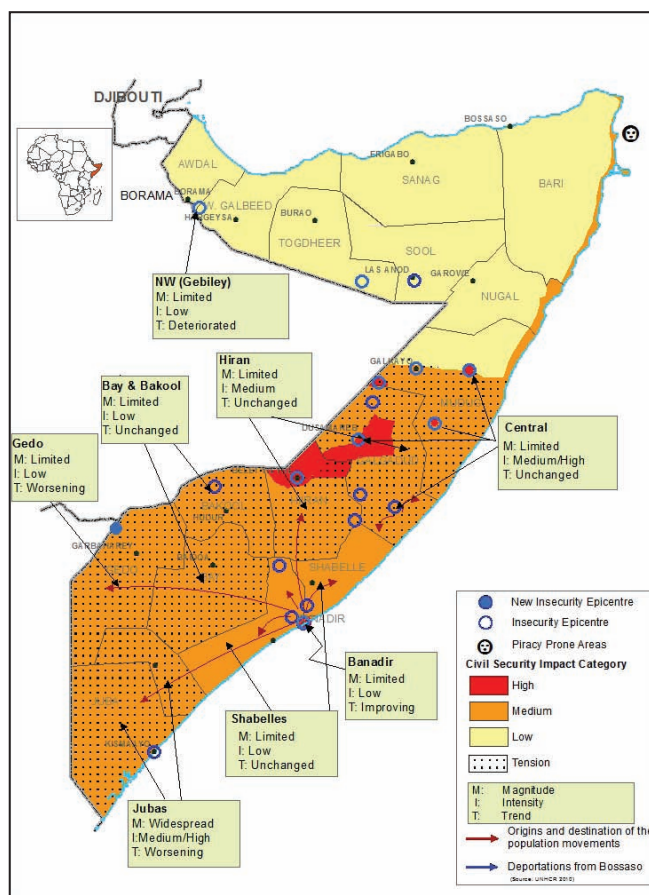
AGRICULTURE

Crop Planting and Production

In *Deyr* 2011/12, an estimated 303,142ha (63% sorghum and 37% maize) was cultivated in southern Somalia, of which about 80 percent (or 246,659ha) was harvested. This is consistent with the normal *Deyr* season pattern of planting with sorghum generally accounting for almost three-quarters of the land planted under cereals. The harvested area under cereals in the *Deyr* 2011/12 is 9 percent and 31 percent higher than harvested area of the Post-War Average (PWA) (1995-2010) and 5-year average (2006-2010). Area harvested with these major crops increased amongst small scale-farmers, with maize recording an increase (41%) from an average area of 57,824ha to 81,341ha. However, in the Juba riverine, an estimated area of 17,700ha with maize (96%) out of 18,400ha was destroyed by floods 66% from Middle Juba. Similarly, an estimated 2,464ha with maize was washed out by flash and river floods in Gedo riverine

The overall production of cereal crops (sorghum, maize and rice) in southern Somalia is equivalent to 188,000 MT in the *Deyr* 2011/12 agricultural season, which is the highest in the last seventeen *Deyr* seasons. The production is

Map 5: Somalia Insecurity Outcomes, Jan-June, 2012



Source: FSNAU, January, 2012

double of the *Deyr* PWA and 131 percent above the 5-year average (2006 – 2010) (Table 1). In this *Deyr* season sorghum accounted for 60 percent of total production, (112,300) MT; maize 38 percent (72,000MT); rice (3,750MT). In addition, 6,250MT of off-season maize (Juba, Gedo, Lower Shabelle and Bay regions) is expected to be harvested in March-April 2012.

Table 2: Cereal estimates (Maize and Sorghum) in Southern Somalia

Regions	Deyr 2011 Production in MT			Deyr 2011 as % of Deyr PWA (1995-2010)	Deyr 2011 as % of 5-year average (2006-2010)
	Maize	Sorghum	Total Cereal		
Bakol	700	10,100	10,800	598%	396%
Bay	7,600	53,800	61,400	195%	154%
Gedo	1,300	5,700	7,000	132%	136%
Hiran	2,300	3,300	5,600	96%	176%
Juba Dhexe (Middle)	1,100	6,000	7,100	173%	159%
Juba Hoose (Lower)	1,000	0	1,000	77%	144%
Shabelle Dhexe (Middle)	15,100	8,400	23,500	214%	329%
Shabelle Hoose (Lower)	42,600	25,000	67,600	216%	410%
Total	71,700	112,300	184,000	200%	231%

The overall *Deyr* 2011/12 harvest for both sorghum and maize in southern Somalia is almost double that of the *Deyr* PWA (202% and 197%, respectively). Most regions received above PWA production except for Lower Juba (77% of PWA) and Hiran (96% of PWA). River and flash floods in the riverine communities of Juba and Gedo in November and early December damaged standing crops and significantly reduced maize production in these livelihoods. Maize harvest in Lower Juba, Middle Juba and Gedo riverine is equivalent to 35, 11 and 7 percent of *Deyr* maize PWA, respectively. Most of the cereal harvest from these regions came from agro-Pastoral areas.

The bulk of the *Deyr* 2011/12 cereal harvest of southern Somalia was collected from Lower Shabelle region (37%) and Bay (33%), followed by Middle Shabelle (13%) all other regions contributed the rest (17%). The share of Shabelle regions combined in the overall *Deyr* cereal production was 50%. Bay and Shabelle regions are the main sorghum and maize suppliers for most regions of Somalia. *Deyr* 2011/12 sorghum production is nearly 40 percent greater than maize production.

The Cowpea Belt of Mudug and Galgaduud regions, which suffered from a series of droughts in the past few years, collected seasonal cereal crop harvest in this *Deyr* as a result of good rainfall performance. This is the second production in the last five seasons (since *Deyr* '09/10), estimated at 1,020MT of sorghum, which is 45 percent higher than the sorghum harvest in *Deyr* 2009/10.

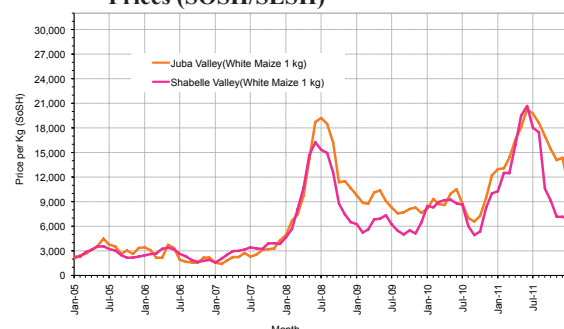
In the Northwest, the agropastoral regions (Awdal, Galbeed and Togdheer) received the second highest *Gu/Karan* 2011 cereal production (308% of the PWA) since 1998. Currently, the cereal production in these regions is estimated at 68,000MT, of which 91 percent is sorghum (62,000MT) and 8 percent is maize (6,000MT). The production is higher than the projections made during the post *Gu* 2011 assessment, which is due to the resumption of *Karan* rains after the assessment, especially in Awdal and W. Galbeed, the main cereal producing regions in Northwest.

Significant cash crop production was collected in the riverine and agro-pastoral livelihoods of southern Somalia. Sesame, vegetables, fruits, groundnuts, banana, cucumbers, grass fodder are some of the most common cash crops grown. *Deyr* 2011/12 cash crop harvest including off-season is estimated at 54,800MT, which is four to five times higher compared to the drought seasons of *Deyr* 2010/11 (15,700MT) and *Gu* 2011 (10,700MT)

Cereal Prices

Prices of sorghum and maize have significantly decreased in Sorghum Belt (30-65%), Shabelle (50-70%) and Juba (30-45%) regions between December 2011 and July 2011 (Figure 1 and 2). Although the cereal prices differ in the different reference markets, average monthly maize and sorghum prices in Middle Shabelle riverine (38%), Lower Shabelle riverine (11-43%), Bay (10-45%), Bakool (19%), Gedo agropastoral (17-50%) in December 2011 are higher compared to a year ago. However, the local cereal prices are higher in Juba (5-27%), Northeast (70-88%) and Northwest (30-55%) between December 2010 and December 2011.

Figure 1: Juba and Shabelle: Regional Trends in Cereal Prices (SOSH/SLSH)



Maize prices vary in the maize producing markets in Shabelle and Juba. The highest maize prices are recorded in Hagar (20,000SoSh/kg) and Afmadow (18,000SoSh/kg) in Lower Juba, while the lowest prices, in the range of 5,000SoSh/kg - 6,500SoSh/kg, are in Qoryoley and Marka (Lower Shabelle). The main reasons for higher prices in the mentioned areas are disruptions in market activities, restricted trade movements among the regions due to civil insecurity, failed maize production in the Juba riverine, as well as remoteness from the main markets. Low maize prices in Shabelle riverine are mainly attributable to improved cereal production in this season and the off-season maize collected in September-October 2011.

LIVESTOCK

Pasture, Water and Livestock Conditions

Due to below normal *Deyr* 2011/12 rains in Bari region in the Northeast, and in parts of Nugal, Sanaag, Awdal and Togdheer regions in the Northwest, below average pasture conditions have been observed. This is with the exception of parts of Hawd, W.Galbeed, West-Golis of Galbeed and Awdal, Nugaal Valley, Sool Plateau, Karkaar/Dharoor, East-Golis of Sanaag and Addun, Coastal *Deeh* of Mudug, Nugal and Bari regions. However, reduced pasture in most of the key pastoral areas in the northern regions is expected due to mass livestock influx from the neighboring rain-deficit livelihoods (parts of Nugal Valley, and Karkaar livelihoods).

Water conditions are normal in most of the key pastoral areas of the North, except for parts of upper Nugal Valley, Sool Plateau, Hawd of Togdheer and East-Golis of Qandala. Late *Hays* rains during 3rd *Dekad* of January- February 2012 improved both pasture and water conditions in Golis Guban livelihood of Awdal and W. Galbeed region. Water and pasture availability is average to very good in all the pastoral and agro-pastoral livelihoods of central and southern regions owing to well distributed and above normal *Deyr* 2011/12 rains. As pasture, browse and water is widely available in most of South, Central and parts of Northern regions, livestock migration is largely normal within the traditional wet season grazing areas. Abnormal migration is only observed among the sheep herders of upper Nugal to western parts of Hawd of Togdheer and pastoralists of Sool Plateau of Bari region to Coastal *Deeh* of Jariban and Eyl districts (Map 6).

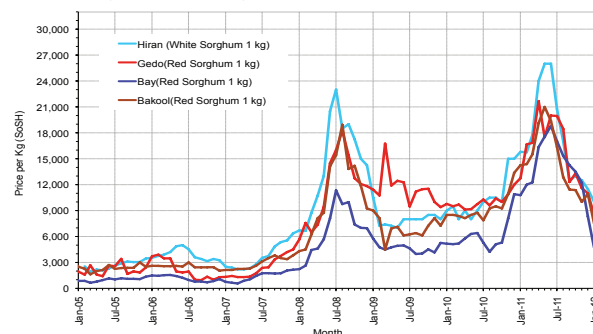
Livestock Body Condition and Herd Dynamics

Significant improvements in livestock body condition of average to above average (PET score 3-4)¹ as well as increased productivity are observed throughout the country. This is due to improved rangeland conditions. However, in the drought affected areas of Central (Coastal *Deeh*) and parts of Lower Shabelle (Southeast Pastoral), parts of Hiran (Hawd and parts of Southern Inland Pastoral), livestock recovery was discerned starting from the *Gu* 2011. In Gedo, Juba, Bay, Bakool, parts of Hiran (Agro pastoral and Southern Inland Pastoral livelihoods) and Central (Coastal *Deeh* and Cowpea Belt), improved livestock body condition as well as medium to high conception rates of sheep, goat and cattle is reported. As such, high kidding/lambing in March-April this year as well as high calving (cattle) in *Hagaa* (July-Aug'12) is expected. In the northern regions, kidding and lambing rates were medium in the *Deyr* season and the same is expected in April-

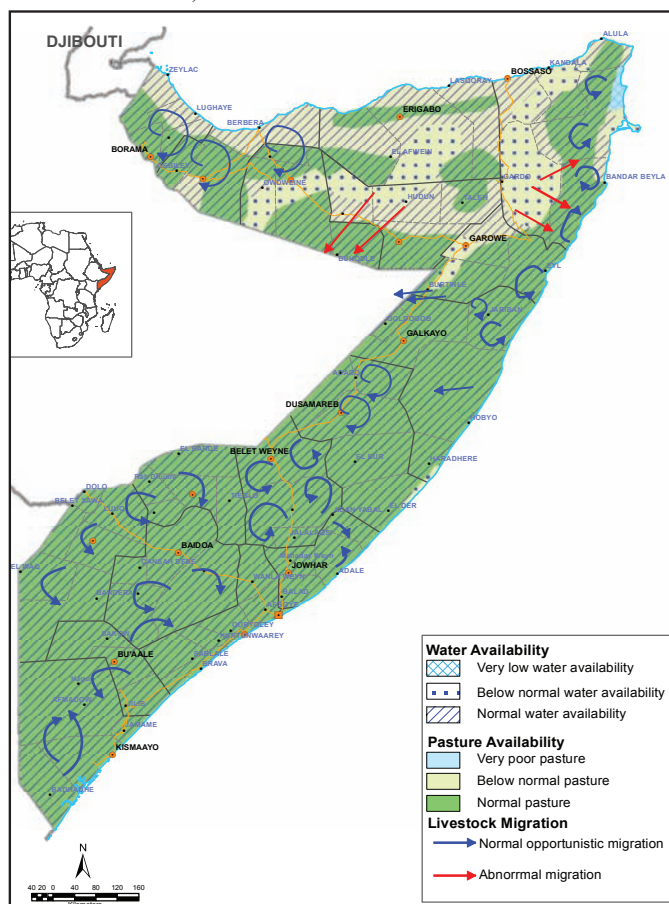
¹ PET (Pictorial Evaluation Tool) - This is a tool used to quantify/standardize evaluations of livestock body condition, by placing sets of photographs of Somali livestock in a range of body conditions scored from 1 (very thin) to 5 (very fat) in a progressive series for each species. This is done rapidly and without touching the body of the livestock in the field, by the side of the road, markets, backyard e.t.c. It is also used to monitor changes in the same herds and flocks over time; and between similar

herds and flocks in different locations

Figure 2: Sorghum belt: Regional Trends in Cereal Prices (SOSH/SLSH)



Map 6: Somalia, Rangeland Conditions and Livestock Migration, December, 2011



Source: FSNAU, December, 2011

March 2012, due to medium conception during the October-December 2011 period. As a consequence, milk production is average in most areas of the North and is expected to remain unchanged in April-May 2012. This is with exception of Nugal Valley, Sool Plateau, Coastal *Deeh* and parts of East Golis in Bari region. The camel calving rates, however, were low, but conception was medium in most parts of the country with calving expected in the next *Deyr* season 2012/13.

FSNAU's herd dynamics analysis points towards a gradual increasing trend in the herd size of the small ruminants (sheep and goat) from the end of December 2011, up until the projected period (June'12). This is particularly so in the key pastoral areas of the North and Central regions, parts of Lower Shabelle and in Hiran. Conversely, in the past drought affected areas of the southern regions (Gedo, Bay, Bakool, parts of Shabelle and Juba) the herd growth of small ruminants and cattle showed a declining trend by the end of December 2011 due to high off-take (distress sales). However, medium kidding/ lambing is expected in March-April 2012. Cattle calving is also expected in July-August 2012 (the *Hagaa* period). Nonetheless, generally, sheep, goat and cattle holdings are below baseline levels in all livelihoods, while camel holding is also below baseline in most areas apart from Juba, W.Galbeed and Awdal regions, where camel herds are at baseline levels.

Livestock Trade and Prices

The trend of cattle prices of both local and export quality, showed an increasing trend in the past six months and a year ago. In July-December 2011, local quality, cattle prices increased in Shabelle Valley (55%), Juba (89%) and Sorghum Belt (94%). Factors that contributed to these increases include reduced supply of cattle given high deaths during the past drought seasons, improved body condition of the remaining cattle and increased access to Garissa (Kenya) cattle market due to abundant pasture and water along the trekking routes leading to the market. This is demonstrated in the increased volume of cattle trade in Garissa market (16%) from June (3533 heads) to December 2011 (4100 heads), in which the majority comes from Somalia². In January 2012, the local quality cattle prices remained stable in Shabelle and Juba, with slight increases in the Sorghum Belt (6%) (Figure 3).

Similarly, local quality goat prices increased in Shabelle (50%), Juba (63%) and Sorghum Belt (89%) regions in December 2011 compared to July 2011 and by 35, 67 and 76 percent compared year ago, respectively. The trend in goat prices remained unchanged in the southern markets in January 2012 (Figure 4). Prices of all livestock species followed a normal seasonal trend in most markets of central and northern regions from July to December 2011 and year one ago, picking-up *Ramadan* (June-August'11) and *Hajj* (Sept.-Oct.'11) collection period. However, the prices dropped between July-August 2011 due to the sea closure (Monsoons) particularly in the Bossaso port, as well as shrinking livestock export demand from the Arab states after the *Hajj* and *Ramadan* festivals (Dec.- May). In December 2011, local quality goat prices showed an increasing trend in the Northwest (8%), Northeast (10%) and Central (18%) compared to July 2011; a slight increase of (11%) in the Northeast and Central, while the Northwest remained unchanged (2%). Compared to a year ago, in January 2012, the price trend of the local quality goat remained unchanged in Central while it increased by 7 percent in the Northeast and declined by 19 percent in North west. This is due to oversupply of local quality goat to the local markets by the wealthier groups as export demand of *Hajj* period ceased (Figure 5).

Livestock exports from the northern ports continued an upward trend in 2011 (4,764,370 heads), rising by 11 percent in January-December 2011 compared to a year ago (4,284,633 Heads). Increases in export volumes were recorded for all livestock species, particularly for camel (18%), but also for sheep/goat (11%) and cattle (6%). Currently, Saudi Arabia remains the major importer of the Somali livestock. However, other countries including Yemen, United Arab Emirates (UAE), Oman, Egypt and Pakistan also import animals from Somalia.

Figure 3: Regional Average Monthly Prices Cattle (SOSH/SLSH)

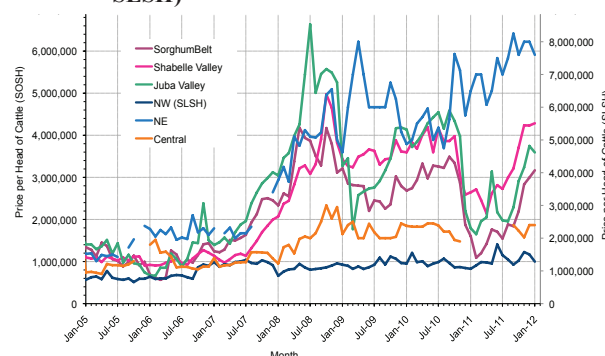


Figure 4: Southern Regional Trends in Local Quality Goat Prices (SOSH/SLSH)

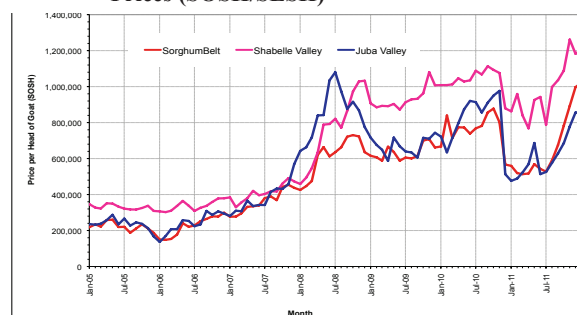
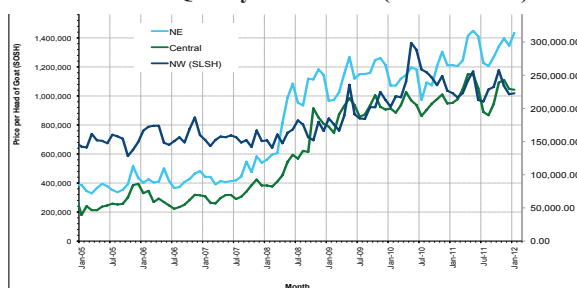


Figure 5: Central and Northern: Regional Trends in Local Quality Goat Prices (SOSH/SLSH)



² National Livestock Information System, Kenya (NLIMS)

MARKETS AND TRADE

Exchange Rate Trends

The SoSh has continued to appreciate against the US dollar since June 2011, and reached a three year high in December 2011. This trend was common across most of the SoSh markets, but high levels were recorded in Mogadishu, where in Banadir regional markets the SoSh gained 23 percent against the dollar during the second half of 2011. At the end of December 2011, the SoSh was traded at an average of SoSh 24,361-27,468 against the US dollar, which indicates an appreciation of 17-21 percent in the South and 13 percent in other SoSh markets. Dealers attribute this gain to the high dollar inflow from the international community in response to the crisis in southern Somalia, as well as to the donor support to the Transitional Federal Government (TFG). The SISH, on the other hand, experienced relative stability over the past one year with a slight change in value (1-4%) in most of the main Northwest markets. In December 2011, one US dollar was exchanged for SISH 5,725, on average, in Hargeisa open market, indicating a slight gain from its level of a year ago (SISH 5,800).

Cereal Imports, Market Functioning and Commodity Price Trends

Commercial cereal imports have increased for the fifth consecutive year (since 2007) to reach a total of approximately 716,405 MT in 2011. Between July-December 2011, a total of 369,100 MT of cereals were imported through Bossaso, Berbera and Mogadishu ports, which is 50 percent higher compared to the corresponding period in 2010. Mogadishu port accounts for the largest share of the total imports. Domestic import market performance suggests that importers have been responding to the recent crisis by increasing the supply of commonly imported goods. They have been able to do this in an environment of relatively steady prices, suggesting that these are competitive import markets. Cross border trade, though limited, informal and erratic, also contributed to the domestic cereal availability. During the period of January-July 2011 a total of 29,270 MT of maize, 1,380 MT of sorghum and 200MT wheat grain were imported from Kenya and Ethiopia.

With the exception of the Juba valley trade catchments, which exhibited a mixed pattern, prices of all essential imported commodities (red rice, sugar, diesel, vegetable oil and wheat flour) in the SoSh areas declined markedly in the recent months. This is attributable to access to relief food in some regions, coupled with increased trade imports at the end of the high seas season. Banadir and Shabelle regional markets recorded the largest decline in import commodity prices. (Figure 6).

In the Central and North SoSh areas, prices have not declined at the same rate, which is attributable to limited humanitarian interventions compared to the South. During the period of July-December 2011, in the SISH zone, the prices of most of the imported items were stable or declined slightly. Exceptions, however, are observed in the prices of vegetable oil and wheat flour which increased by 17 percent (Analysed jointly with FEWS NET).

Consumer Price Index (CPI)

The CPI, which is based on the Minimum Expenditure Basket (MEB), indicated a mixed trend throughout the country in December 2011. The index indicates significant decreases in the South (28%) and Central (25%), while remaining stable in Northern regions for the six month period (June-December 2012) (Figure 7). In the South and Central regions, reduced sorghum prices were a major driving factor of the slowdown in inflation. Substantial decreases in the price of other commodities in the MEB such as wheat flour, sugar, vegetable oil and milk have also contributed to deflation in the food basket, although to a lesser degree. However, in the Northern markets, the price of red sorghum is higher than it was in mid 2011, a reflection of low local cereal (sorghum) availability in those markets (the largest share in the basket relative to other components). Yearly comparison indicates 11-18 percent increase in inflation in the North and relative stability in the South and Central.

Figure 6: Shabelle regions: Trends in Imported Commodity Prices

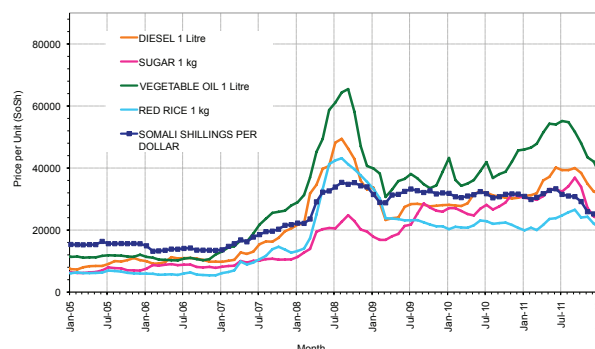
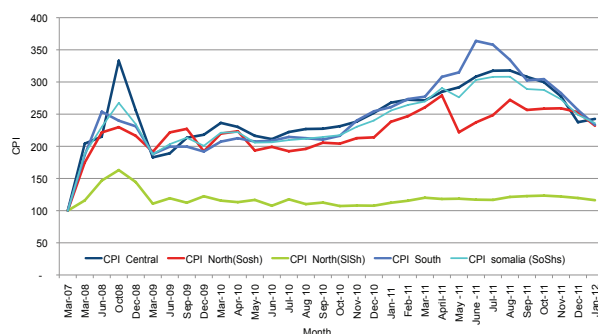


Figure 7: Regional CPI Trends



NUTRITION SITUATION

The overall nutrition situation in the country shows an improvement from the previous season, however, acute malnutrition and death rates in the south of Somalia still remain high and above emergency thresholds and are classified as likely **Very Critical**. The global acute malnutrition rates in the south are currently between 20-30% with exception of Bay region and Juba Riverine, which are still >30%. Severe acute malnutrition rates have also improved from >10% in all regions in the south <10%. The crude death rates are <2 deaths/10,000/day in the entire country apart from Mogadishu IDPs at 2.06 (1.60-2.66) and Kismayo IDPs at 2.30 (1.60-3.0), also indicating improvements, but remain above famine levels and of great concern.

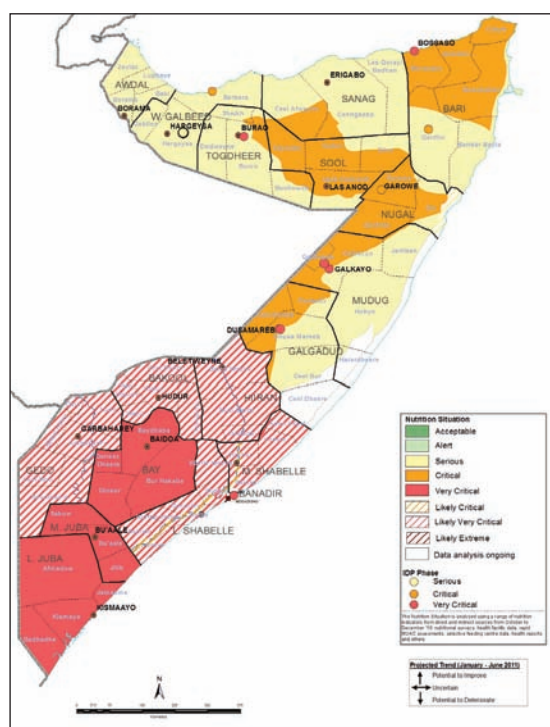
The improvements are attributed not only to positive food security indicators showing increased household food access, milk and income, but also access to humanitarian support, in the form of food and non food assistance, and the control and management of disease outbreaks. Slight deteriorations are noted in the Hawd of Central, where the nutrition situation was classified as **Critical**, from **Serious** and the in the Hawd of Northwest whereby it is classified as **Serious** from an **Alert** phase in August 2011. The latter is likely attributed to localized cholera outbreaks in the area and out migration of livestock to Ethiopia, limiting access to livestock products however, the situation is likely to improve from February on their return. The nutrition situation of IDPs remains of concern in the entire country with settlements reporting between **Serious** to **Very Critical** levels of acute malnutrition. The projected increase in household food access and income is likely to positively impact the nutrition situation. However the positive nutrition situation outlook remains fragile due to continued and anticipated disease outbreaks, high morbidity coupled with the suspension of key humanitarian agencies providing nutrition and related services.

At national level, an estimated 323,000 (22% of the 1.5 million) Somali children are acutely malnourished currently, and in need of specialized nutrition treatment services. Although high, the caseloads reflect an improvement from 450,000 (or 30% of the 1.5million) acutely malnourished Somali children in August 2011. Of the 323, 000 malnourished children, 93,000 (6% of the 1.5million Somali children) are severely malnourished, which also reflects an improvement from the 190,000 cases (13% of the 1.5 million Somali children) in August 2011.

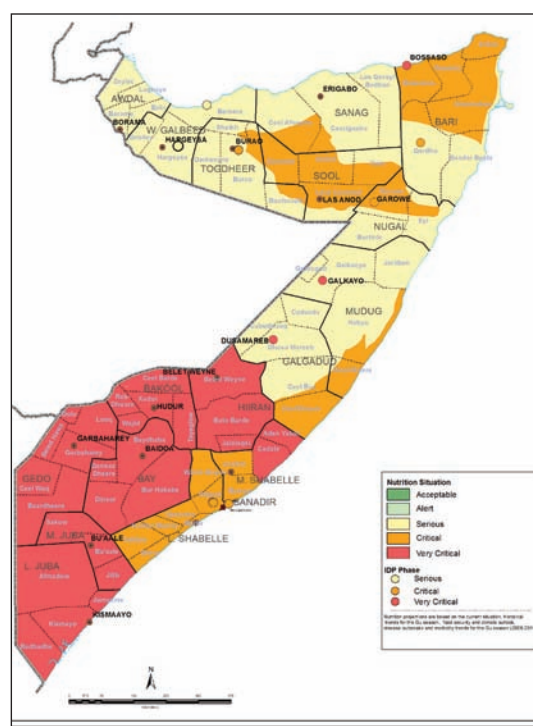
The South remains in a likely **Very Critical** nutrition phase and is host to majority of the acutely malnourished children. Out of the national estimate of 323,000 acutely malnourished children currently in need of specialized nutrition treatment services, 224, 000, or 70%, are in southern regions. Additionally, out of the approximately 93,000 severely malnourished children, 75,000 (80%) are in the southern regions. Whereas these figures remain high, they reflect a reduction in caseloads since the August 2011. The caseloads for acute malnutrition in the south has decreased from 336,000 to 224,000, while for severe acute malnutrition, from 160,000 to 75,000. Lower Juba and Bakool Regions, nevertheless remain of concern with high numbers of acutely malnourished children continuing to be reported, while access to treatment services remains severely restricted.

The nutrition outlook for February-June 2012 for north and central is likely to remain unchanged based on seasonal trends associated with household access to livestock products, except for the Hawd of central where improvements are anticipated following control of an AWD/cholera outbreak. In the South, the situation is likely to remain **Very Critical** with GAM rates of 20% and above due to the impacts of seasonal disease outbreaks, and suspension of humanitarian assistance in the area, except for Lower Shabelle due to improved food security and declining numbers of admissions into nutrition rehabilitation programs. (Map 8).

Map 7: Nutrition Situation Estimates, January 2012



Map 8: Nutrition Situation Estimates, Feb-June 2012



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

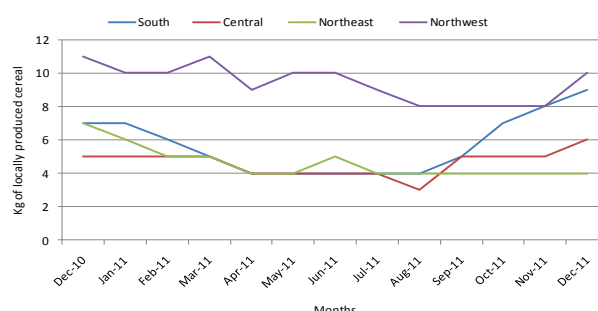
The post-*Deyr* 2011/12 urban assessment results and the market data (Dec'11 and Jan'12) indicate an improving food security situation across the country. The number of the urban population in an acute food security crisis in January-June 2012 is estimated at 550,000 people, of which 73 percent are in **Crisis** and the rest in **Emergency**. The number of urban people in **Crisis** and **Emergency** in the country (except Mogadishu) decreased by 25 percent (from 585,000 to 440,000). However, the current total numbers of people in acute food security scale also include the estimates for Mogadishu, which is equivalent to an additional 110,000 people¹. Two-thirds of the affected urban population, or 410,000, are concentrated in the South. Out of these, 300,000 people are in the urban areas of the South outside Mogadishu, while 110,000 are residents of Mogadishu. The number of affected urban population in the South (excluding Mogadishu) indicate a 23 percent decrease since the post-*Gu* 2011. Of the total affected population 70 percent are in **Crisis** and 30 percent are in **Emergency** (Juba, Middle Shabelle and Bakool regions). In Mogadishu, 110,000 resident population are estimated to be in an acute food security crisis, of which 60,000 are in **Emergency**, while the rest is in the **Crisis**. Also, the population in crisis in the Central regions has reduced by 26 percent, from 60,000 in *Gu* 2011 to 40,000. In the North, the number of population in acute food security Crisis and Emergency have also reduced by a significant 37 percent, from 159,000 in *Gu* 2011 to 100,000 people. All of the affected people in the North are in the SoSh zone (Sanaag, Sool, Bari, Nugaal and North Mudug region).

The *Deyr* 2011/12 assessment results indicated a major improvement in the urban food security in the South and Central from the situation in post-*Gu* 2011. The main contributing factors include: reduced food price inflation following large-scale humanitarian interventions (food and cash response) owing to the improved security situation in Mogadishu and opening increased activities of the up of city's port, improved trade activities, significant food security improvements in the rural areas, which eased the situation in urban livelihoods in terms of reduced competition for labor, humanitarian assistance and social support. However, Mogadishu and the urban areas of Juba regions still remain in **Emergency**. In the Juba regions the food security situation is aggravated by heightened insecurity, which resulted in the slowdown of Kismayo port activities, which was the main source of employment for the urban poor (portage, etc.) and reduced demand for farm labour following flood damage to the crops in riverine areas. In Mogadishu, 22 percent of population have poor food consumption and access to humanitarian interventions is considerably lower among the resident population compared to internally displaced persons (IDPs). The population employs a combination of moderate to very severe coping strategies (Analysed jointly with WFP).

The cost of the MEB in the South (including Mogadishu) and the Central reduced by 27-50 percent between July and December 2011 and the trend of January 2012 shows a further decline of 6-18 percent in the South from the preceding month. Consequently, purchasing power of the urban poor in southern regions has strengthened, which is indicated by the improved terms of trade (ToT) between casual labour wages and the cereals. The ToT has more than doubled between July and December 2011 in most of the southern regions, including Mogadishu. The ToT has increased by 20-50 percent in Central in the same period.

In the North, the food security situation of the urban population remained stable in SiSh areas, while some improvements were observed in the North SoSh areas. In the North SoSh zone, the cost of the MEB in December 2011 reduced slightly from July 2011 due to some decrease in the prices of imported food commodities (wheat flour, sugar and vegetable oil). Labour availability and wage rates remained stable in the zone. The level of social support is also high with one-third of the population reporting access to remittances and 25-45 percent of households benefiting from cash gifts from wealthier households. The nutrition situation among the urban population in the North ranges between **Alert** to **Critical** levels. In Northwest, the nutrition situation is sustained in either **Alert** or **Serious** since *Gu* 2011 when the regional representative urban assessments were initiated. In Northeast regions, the nutrition situation among the urban population has improved from **Critical** in *Gu* 2011 to **Serious** levels. The nutrition findings in Mogadishu urban and IDPs indicates a sustained **Very Critical** nutrition situation since the October 2011 assessment. Detailed information on the urban nutrition situation is provided in the Post *Deyr* 2011/12 Nutrition Technical Report due for release late February.

Figure 8: Trends in Terms of Trade between Labour to Locally Produced Cereal by Zone



¹ The FSNAU/WFP food security assessment in Mogadishu was carried out in December 2011 for the first time. Previously no estimates of the population in crisis has been done for Mogadishu due to prevailing insecurity and restricted access to the area.

Gedo Region

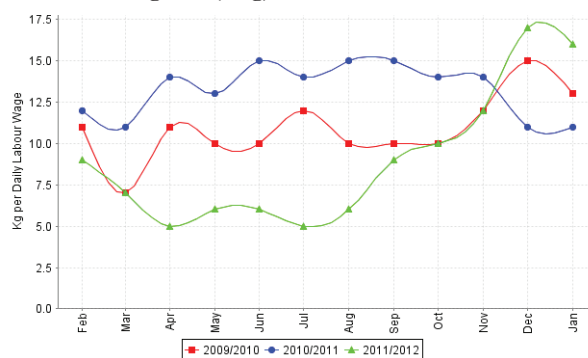
The food security situation shows improvement in most livelihoods of the Gedo region in the Post-*Deyr* 2011/12 season. The total number of people in acute food security crisis decreased by 63 percent since the Post-*Gu* 2011. Currently an estimated 50,000 rural people are in food security phases of **Crisis** (40,000) or **Emergency** (10,000). By livelihoods, the riverine communities remain in the **Emergency** as in the post-*Gu*. Gedo Agropastoral High Potential, Dawa Pastoral and Southern Inland Pastoral (SIP) are classified in the **Stress** phase, Southern agropastoral improved to **Crisis** (Emergency in post-*Gu* 2011). An estimated 30,000 urban people are also in **Crisis**, which indicates a 25 percent decline from post *Gu* 2011.

The improvement in the food security situation in most livelihoods is largely attributable to the impact of favourable *Deyr* 2011 rains as well as increased humanitarian assistance. Factors that contributed to the improvement include: strengthened purchasing power of the local population as a result of decline in local cereal prices (45-50% since July 2011) and increase in wage rates and livestock prices (over 80% for goat and cattle; 48% for camel since July 2011); good cash crop (riverine) and cereal production (in agropastoral areas), which have also provided labour opportunities to the poor; improved income from crop (agropastoral), milk and livestock product sales. Higher incomes from livestock/livestock product sales is attributable to the recovery of livestock conditions as a result of abundant pasture and water in the area due to favorable *Deyr* rains. In addition, increased milk production is reported throughout the entire region as a result of calving/kidding of camel (*Gu* 2011) and small ruminants (*Deyr* 2011). Further, medium goats/sheep kidding and lambing is expected between March and April 2012, which will ensure milk availability for own consumption in the projection period. However, the cattle calving rate is currently low but is anticipated to improve in the next *Hagaa* (July-Aug) season given high conception rates in the this *Deyr*.

Cereal production (sorghum and maize) in Gedo agropastoral is estimated at 6,850MT (132% of the PWA). However, most of the cereals were collected in the agropastoral areas (sorghum), while maize crops in the riverine areas were damaged by the floods. The flooded areas have been replanted and off-season maize (680MT) is expected to be harvested in late March 2012 and early April 2012. The cereal stocks among the poor in agropastoral areas is estimated to last 2-3 months. In riverine areas the stock availability, including the off-season production, is estimated at 1.5 months. However, good cash crops harvests (500MT of onion, sesame and cowpea) are also reported in Gedo region in this *Deyr*; providing job opportunities to the poor population. *Gu* farming activities will also provide a source of labour to the poor starting from March/April 2012. The ToT between daily labour wage and cereals have improved considerably in the region. Namely, the average ToT labour/cereals in December 2011 was equivalent to 17 kg for sorghum and 19kg for maize, almost a trebling of the amount compared to that in July 2011 (Figure 9). The ToT between local quality goat and red sorghum has more than doubled in the same period (80-90kgs of cereals).

The integrated analysis of nutrition situation in Gedo region indicate sustained likely **Very Critical** nutrition situation across all livelihoods since *Deyr* 2010/11. Though the data from the nutrition assessments conducted in the three livelihoods in October failed the quality test, a triangulation of data from health and feeding facilities in Gedo region indicate an improvement in levels of malnutrition compared to *Gu* 2011 assessments but still within the likely **Very Critical** levels. The improvement is linked to the improved food security situation in the region. The concerning nutrition situation is generally linked to immediate and chronic underlying causes. These are regular interruption of food access, seasonal outbreaks of acute water diarrhea (AWD), cholera, malaria, measles and whooping cough, while the underlying causes include: poor dietary quality, sub-optimal child care and feeding practices, and limited access to basic human services such as safe water, health and sanitation facilities, which exposes communities to high morbidity and subsequently high levels of acute malnutrition. Mitigating factors include improved household food and income access mainly attributed to the positive effects of the season rainfall performance that led to increased cereal production, decreased local cereal prices, improved livestock body conditions and terms of trade.

Figure 9: Terms of Trade between Labour rate to Red Sorghum (1Kg) in Gedo



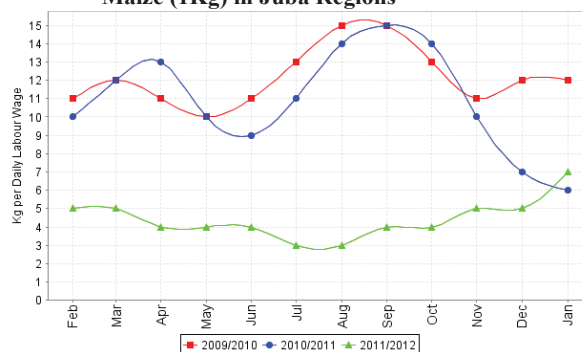
Average planted maize. Khadijoxaa Ji-Belethawa, Gedo region, FSNAU, December, 2011

Lower and Middle Juba Regions

The food security situation in the Juba regions showed some improvements since last *Gu* although an acute food security crisis persists in both regions. The **Emergency** phase sustained in the Southeast Pastoral and the riverine livelihoods of both regions, while parts of the Agropastoral are in the **Crisis** phase. Significant improvements are visible in the Southern Inland Pastoral (camel herders), which is classified in Stressed phase in the post *Deyr* 2011/12. The total number of affected rural population is estimated at 170,000 people up to June 2012. Out of these, 75,000 people are in **Crisis** (35,000 in Middle Juba and 40,000 in Lower Juba) while 95,000 people are in **Emergency** (50,000 in Middle Juba and 45,000 in Lower Juba). Thus, the total number of affected population has reduced from the previous season by 41 percent (290,000 people in *Gu* '11). In the urban areas of both regions, 70,000 people are in **Emergency** (25,000 in Middle Juba and 45,000 in Lower Juba), which represents a 17 percent increase from last *Gu* (60,000 people). The deterioration in urban areas is attributable to a number of factors including prevailing insecurity causing disruption in the Kismayo port, which affected income opportunities of the urbanites, reduced self employment opportunities such as charcoal production and high food prices resulting from hampered trade activities in the regions.

The positive changes discerned in the food security situation in this region are largely attributable to favorable *Deyr* rains. These include improved livestock prices as body condition of livestock enhanced due to good pasture and water conditions; improved milk availability, particularly for camel and goats, as a result of calving/kidding which that occurred in *Deyr* season; reduced cereal prices although they still are highest in the South; slightly improved purchasing power as reflected in the terms of trade (Figure 10). The projected livestock herd size up until June 2012 is also showing an upward trend due to expected medium to high kidding/lambing (Feb.-Mar.'12). However, the food access of the population in **Crisis** and **Emergency** phases is still constrained by high debt levels, limited milk production among cattle and significant decline in cattle holding due to high offtake (death and distress sale) during the previous droughts, restricted humanitarian assistance and reduced agricultural labour demand as a result of *Deyr* floods.

Figure 10: Terms of Trade between Labour Rate to White Maize (1Kg) in Juba Regions



The total crop production in the Juba regions is estimated at 8,199MT, of which 27 percent is maize and 73 percent is sorghum (77% of PWA in Lower Juba and 173% of PWA in Middle Juba). While sorghum production from agropastoral areas is significant, particularly in the Southern Agropastoral areas of Buale and Sakow (250% of PWA), the maize production is affected by the floods in riverine areas. The off-season maize production (March / early April) following the recession cultivation in the *desheks* of both regions is estimated at 4,100MT, most of which will be collected in Middle Juba (65%). Additionally, off-season cash crop production of cowpea and sesame is also expected in both regions. However, as the floods significantly reduced crop production, poor households in the riverine areas have very limited cereal stock availability (up to 2 months), including the off-season harvest. The cereal stocks of the agropastoral population is also estimated to last for 1-2 months with the exception of Sakow district of Southern Agropastoral, where the cereal stocks of the poor are likely to last up to the end of May.



Maize Crop Destroyed by Floods. Abdule Kanane, Jilib, Middle Juba, FSNAU, Dec. 2011

The integrated nutrition analysis indicate a sustained **Very Critical** nutrition situation in pastoral, agro-pastoral and riverine livelihoods in Juba regions since *Deyr* 2010/11. The nutrition assessments conducted among the populations in the three livelihoods in October 2011 recorded GAM rates of >20 percent indicating a **Very Critical** nutrition situation. However, the results also show a significant decline in the levels of acute malnutrition from the extremely high GAM rates of >30 percent recorded in these livelihoods in July 2011 which is linked to improving food security situation. The sustained poor nutrition situation among the population in Juba region is linked to the cumulative impact of the reduced food access accrued from the drought experienced in 2011 and frequent disease outbreaks such as measles and acute watery diarrhea that have a direct impact on the health and nutritional status of the population. The reduced humanitarian access in the regions due to security constraints has further limited access to food, health and nutrition assistance in the regions. In addition, chronic underlying factors such as inadequate sanitation facilities and lack of access to safe drinking water, poor child care and feeding practices remain a challenge to the health and nutrition well being of the population.

Bay and Bakool Regions

The food security situation has markedly improved in all rural livelihoods of Bay and Bakool regions in this *Deyr* season. All rural livelihoods that were classified in **Emergency** phase in November-December 2011 have improved to **Crisis** phase in the projection period up to June 2012. Although the snap-shot analysis for January 2012 indicated **Stressed** food security conditions in Bay Agropastoral High Potential, the livelihood is projected to deteriorate to **Crisis** phase in February-June 2012. In Bay region, the number of affected rural population is estimated at 105,000, indicating a 75 percent reduction from last *Gu* (410,000 people). In Bakool, the estimated number of affected people in the rural areas is equivalent to 140,000, which is a decline of 30 percent from the previous season (200,000 people). In urban areas of both, regions the number of population experiencing acute food insecurity (IPC Phases 3 and 4) declined by 40-45 percent from post-*Gu*. In January-June 2012, a total of 25,000 urban population of Bakool region is estimated in **Crisis** (20,000) and **Emergency** (5,000) phases, while in Bay, 45,000 people in urban areas are estimated in **Crisis**.

The improvements observed in both regions are largely attributable to considerable humanitarian interventions as well as exceptional *Deyr* seasonal performance. The positive impact of these two factors were seen in reduced cereal prices, increased resources of the local population to undertake *Deyr* farming activities, above average crop production, increased farm labour opportunities, improved rangeland and enhanced livestock condition with higher prices, significant *zakat* to the poor households and increased remittances from members of the households working in other parts of Somalia (Mogadishu, Northeast and Northwest regions).

However, in most livelihoods in the two regions, milk production is still extremely below average because of none to low kidding and calving rates resulting from poor conception in the previous seasons (*Deyr* 2010 and *Gu* 2011). Herd sizes of livestock also remain considerably below baseline levels in the pastoral areas due to high off-take in the past drought seasons. Therefore, poor and lower middle households do not benefit much from high livestock prices owing to limited holding.

The total cereal crop production in Bay is estimated at 61,400 MT, which is the third highest production since 1995, while Bakool collected 10,800 MT of cereals, the highest production since 1995. The cereal stocks of the poor households in Bay region are estimated to last 4-7 months in the high potential areas, although in Bakool agropastoral as well as low potential areas of Bay, cereal stocks are only sufficient for 1-3 months.

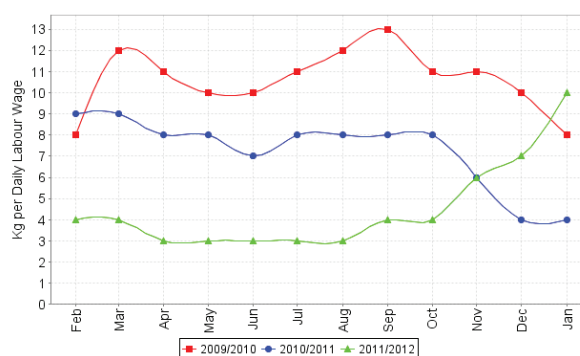
In Bay region cereal prices declined by 51 and 24 percent compared to six-months (Jul '11) and a year ago (Dec '10), which is attributable to increased supply from *Deyr* production, cross border cereal supply from Ethiopia prior to the harvest and food relief interventions. Similarly, cereal prices declined in Bakool markets by 33 and 18 percent in the corresponding periods. As a consequence, the ToT between labour and cereals improved considerably in both regions, to 10kg in Bay and 6kg in Bakool markets in December from 3kg in July 2011 in both regions (Figure 11). The ToT indicates a further improvement in January 2012 (50% in Bay and 33% in Bakool), up to 10Kg.

The nutrition situation across the pastoral and agro-pastoral livelihood zones in Bakool and Bay regions is sustained at Likely **Very Critical phase** since the *Deyr* 2010/11 with very high GAM rate of >30% recorded. However the malnutrition rates have declined from the extremely high (>45%) levels recorded in *Gu* 2011, which is attributed to the improved food security situation. The worrying nutrition situation is mainly attributed to persistent Acute Watery Diarrhea (AWD) outbreaks, cholera, measles and high morbidity. Further aggravating factors include chronic problems of poor child feeding and health care practices and low humanitarian interventions in terms of safe water, health and nutrition services, which predispose populations to high morbidity and consequent high levels of acute malnutrition.



Good livestock body conditions. Berdale-Baydhaba, FSNAU, December, 2011 Bay region

Figure 11: Terms of Trade between Labour rate to Red Sorghum (1Kg) in Bay Bakool



Lower and Middle Shabelle

The food security situation in the Shabelle regions (Middle and Lower Shabelle) has shown significant improvements this season. Currently, in both regions, a total of 165,000 people are estimated in **Crisis** (85,000) and **Emergency** (80,000) phases, which indicates a considerable (80 percent) reduction of population in an acute food security crisis (Phases 3 and above) since post-*Gu* 2011. In Lower Shabelle, 10,000 people in rural areas are acutely food insecure (5,000 people in **Crisis**; 5,000 people in **Emergency**). In Middle Shabelle, 155,000 are estimated to be acutely food insecure (80,000 people in **Crisis**; 75,000 in **Emergency**). In Middle Shabelle, Adale and Balad districts improved from **Famine** to the **Emergency phase** in the post *Deyr* 2011/12. The agropastoral of Jowhar and Balad and Middle Shabelle riverine have improved to **Crisis** and **Stress**, respectively. In Lower Shabelle, a portion of agropastoralists is in **Crisis** and the South-East Pastoral **LZ** is in **Emergency**, while all other livelihoods are in **Stress** phase in the post-*Deyr* period. This indicates a 54 percent decrease from *Gu* 2011 (335,000 people). In the urban areas, the total number of affected people in both the Shabelle regions is estimated at 100,000 people. Out of which, 70,000 people in **Crisis** are in Lower Shabelle and 30,000 people (15,000 in **Emergency** and 15,000 in **Crisis**) in Middle Shabelle. This is an improvement of 17 percent from last *Gu* season (120,000 people).

These improvements are primarily due to favorable *Deyr* 2011/12 rains in most of the livelihoods, which significantly improved crop, pasture and water conditions in both regions. Additionally, considerable humanitarian assistance (rehabilitation of canals, seed distribution, cash for work, etc.) was provided in response to famine conditions in Lower Shabelle and parts of Middle Shabelle (Balad and Adale).

The positive trends are observed in income and food sources of the population. Milk production increased in the agropastoral and pastoral areas, while cereal production is above average (216% of PWA in Lower Shabelle and 214% of PWA in Middle Shabelle). The cereal stock availability among the poor is estimated to last for 5-7 months. Significant cash crop (rice, cowpea, sesame) activities in the regions, particularly Lower Shabelle, also provided labour opportunities to the poor. However, in the Southeast Pastoral livelihood (cattle pastoralists) the poor who have suffered from considerable livestock (cattle) losses during the last year's drought will require several normal seasons to recover from the crisis. The improved cereal availability in the region significantly reduced the cereal prices in the last six months and the last 12 months (257% from Jul '11 and 28% from Dec. '10). Further, intense farming activities contributed to increased daily wage rates, boosting the purchasing power of the market dependent population as reflected in the ToT between daily labour wage rates and maize (4kg to 9kg of maize/daily wage rate in July '11 and Dec. '11, respectively). The ToT between local quality goat and maize in Shabelle riverine markets combined, has tripled since July 2011, as a result of increased livestock prices and decreased maize prices. In December 2011, one goat exchanged for 194kg of maize in Lower Shabelle and for 164kg of maize in Middle Shabelle.

The nutrition situation of the agropastoral and riverine population in Middle and Lower Shabelle regions remains *likely Very Critical*. Although in the same phase, the nutrition situation in the agro-pastoral population in Middle Shabelle remains of concern compared to the Lower Shabelle agro-pastoral population where improvements are illustrated. Nutrition surveys in Middle Shabelle indicated a GAM of >30 percent and ~20 percent (rates reported this way due to quality issues) among the agro-pastoral and riverine population respectively in October. The mortality rates remained stable at 2.00 for the agro-pastoral population and <2 among the riverine. Key factors affecting the nutrition situation in Middle and Lower Shabelle, are disease outbreaks (Acute Watery Diarrhoea – measles), low milk production and chronic problems of poor child feeding and health care practices and limited access to humanitarian interventions and health facilities. Mitigating factors include improved household food and income access mainly attributed to the positive effects of the season rainfall performance that led to increased crop (cereal and cash) production, decreased local cereal prices, improved livestock body conditions and ToT.

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

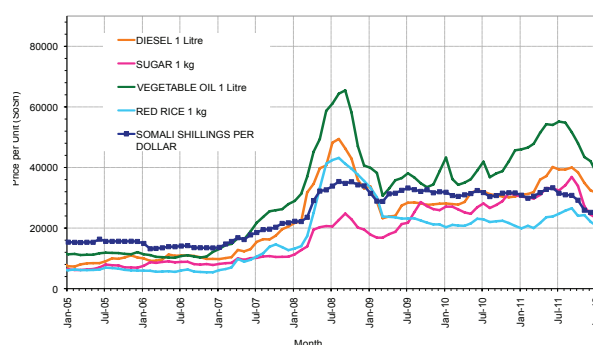
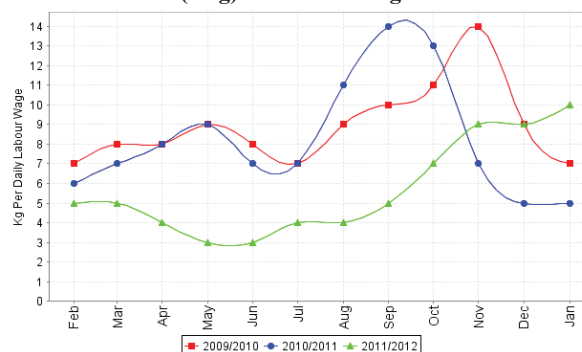


Figure 13: Terms of Trade between Labour rate to White Maize (1Kg) in Shabelle Regions



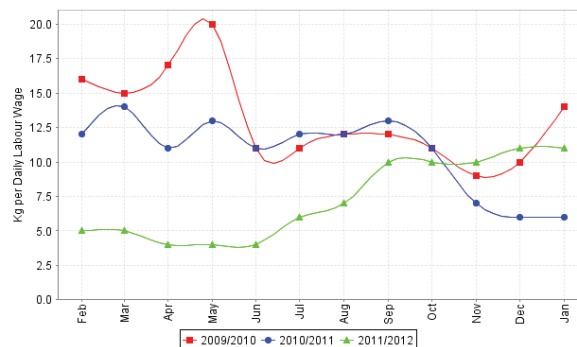
Good maize production. Walamoy, Balad, Middle Shabelle, FSNAU, December, 2011

Hiran Region

The food security situation has shown a significant improvement since post *Gu* 2011 in most livelihoods of Hiran region. Riverine and Hawd Pastoral livelihoods, which were previously classified in **Emergency** and **Crisis** phases, have improved to **Stress** phase. Southern Inland Pastoral has also improved from Emergency phase in post-*Gu* to the **Crisis** phase in post-*Deyr* 2011/12. However, the agropastoral livelihood of Hiran remains in **Emergency** phase. In total, in the projection period (February-June 2012) 75,000 people in rural areas are estimated in acute food insecurity phases of **Crisis** (35,000) and **Emergency** (40,000), which represents a 62 percent decrease from post-*Gu* 2011 (195,000 people). The situation has also improved in urban areas where 30,000 people are estimated to be in **Crisis** in post-*Deyr* 2011/12, which is a 25 percent decrease since post-*Gu* 2011 (40,000 people).

Factors that contributed to the improvements in the mentioned livelihoods include increased own food production (milk, crops) of rural pastoral and riverine population; improved livestock prices and agricultural daily wage rates; enhanced income from self-employment (crop fodder sales, collection of bush products); reduced migration costs due to abundant pasture and water; strengthened purchasing power following a decline in cereal prices and improved daily labour wage and livestock prices (Figure 13). The sustained **Emergency** phase in the agropastoral livelihoods, is a result of drastically reduced livestock (cattle) assets due to prior drought episodes, poor crop production with only one month cereal stock availability among the poor, high accumulated debts and limited humanitarian access. However, rangeland resources have somewhat replenished, resulting in improved livestock body condition. The riverine areas as well as neighboring regions, including Somali region of Ethiopia where cross border cereal trade is very active, collected good cereal harvest as a result of favorable *Deyr* rains. The crop production in Hiran region is estimated at 5,600MT (96% of PWA and 176% of 5-year average), of which 80 percent was collected in riverine areas. As a result of increased cereal availability, the white maize prices have more than halved since July 2011 and are 30 percent lower than the same time last year. The prices are expected to decline further in the coming months as more cereal supply from the producing regions (Hiran, other southern regions and Somali region of Ethiopia) finds its way into the local market.

Figure 14: Terms of Trade between Labour rate to White Sorghum (1Kg) in Hiran



Maize inter-cropped with cowpea. Buloburte, Hiran, FSNAU, December, 2011

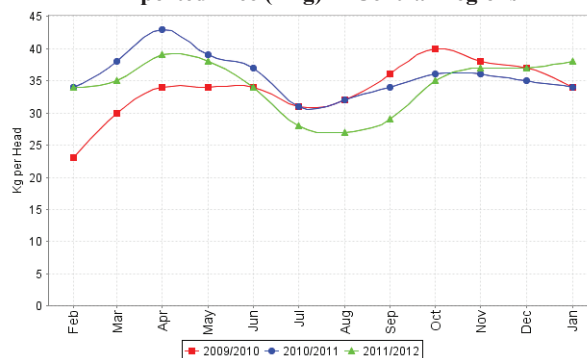
In the projection period (Feb-June '12), the food security situation trend will largely depend on the *Gu* rainfall performance and the security situation in the region.

The nutrition situation among the pastoral, agro-pastoral and riverine populations in the Hiran region is *likely Very Critical*, indicating a sustained phase from *Gu* 2011. Whereas it was not possible to conduct a nutrition survey during the *Deyr* 2011 due to access problems, information from health facilities in the regions indicates a high (>20%) number of acutely malnourished reported at health facilities with a stable trend in last months. The poor nutrition situation in Hiran is mainly attributed to poor household food security and limited access to milk, in addition to lack of access to adequate health and humanitarian interventions. The high morbidity rates in the region are also worrying with acute watery diarrhoea, measles and whooping cough reported in all the four districts.

Central Regions

The overall food security situation showed improvement since the previous season primarily as a result of the positive impact of good Deyr 2011/12 rains. An average crop production (cowpea and sorghum) in the Cowpea Belt, improved the rangeland conditions, increased livestock production and reproduction, particularly in Hawd and Addun, strengthened purchasing power owing to high livestock prices and reduced cereal prices, and increased humanitarian presence in the region are among the main contributing factors (Figure 14). Therefore, the livelihood of Hawd improved from the **Crisis** phase in post-*Gu* 2011 to **Stress** phase in post-*Deyr* 2012. The Addun livelihood retained the **Crisis** phase but the total number of affected population has reduced from the previous season. The Cowpea Belt livelihood is also classified in the **Crisis** phase, indicating an improvement from **Emergency** in the post-*Gu* 2011. However, the Coastal *Deeh* livelihood, which suffered significant asset losses (livestock) in the previous drought periods with the population is highly indebted remains in **Emergency** phase. Currently, the total rural population in the acute food insecurity phases of **Crisis** and **Emergency** is estimated at 135,000 people, which is a 33 percent decrease from *Gu* 2011 (200,000 people). Out of the affected rural population 65,000 people are in **Emergency** (Phase 4), while 70,000 people are in **Crisis** (Phase 3). The number of affected people in the urban areas has also decreased by a significant 33 percent, from 60,000 in *Gu* 2011 to 40,000 people in *Deyr* 2011/12, which is largely attributable to reduced cost of living following a decline in staple food prices.

Figure 15: Terms of Trade between Local Quality Goat to Imported Rice (1Kg) in Central Regions



In the most likely scenario for a projection period of February-June 2012, the current food security phase will remain the same in all livelihoods. The projection is based on contributing factors such as improved/maintained purchasing power of rural population as a result of decline/maintenance of cereal prices and increased livestock prices (due to Ramadan sales); anticipated improvement in milk availability at the household level given the expected average kidding/lambing rates; availability of cereal stocks (3-4 months) in the agropastoral areas; the preliminary forecast of the average *Gu* rains, which will improve pasture and water conditions after the dry *Jilaal* season.

The sustained food security crisis in three livelihood zones of Central is mostly due to below baseline livestock herd sizes among the poor as a result of previous drought seasons and reduced income from milk sales given low camel calving. The number of destitute pastoralists seeking alternative income sources in urban areas and villages remains high although about 25-30 percent of impoverished pastoralists reportedly returned to the original livelihood. These households try to rebuild their livelihoods by replenishing their shrunken herds with a new stock of goats/sheep through kinship support.

The nutrition situation has improved in the populations of Addun pastoral livelihood zones from **Critical** in *Gu* 2011 to the current **Serious** phase. The area has experienced improved access to food due to increased milk production and the strengthened purchasing power associated with increased goat to rice ToT after a good *Deyr* 2011 rainfall. The nutrition situation has, however, slightly deteriorated in the Hawd pastoral livelihoods from **Serious** to **Critical**. The deterioration is predominantly linked to disease outbreak, and the limited access to milk and meat products following the effects of previous consecutive poor seasonal performance in the livelihood zone. The WHO/MoH reported malaria, acute watery diarrhoea and cholera outbreaks in the Hawd areas of Adado district and Galkayo Districts. Due to security constraints, it was not possible to collect nutrition data in the coastal *deeh* and cowpea belt of central regions for analysis.



Good goat and pasture condition. Hawd, Abudwaq, Dhusamareb, Central region, FSNAU, December, 2011

Northeast Regions

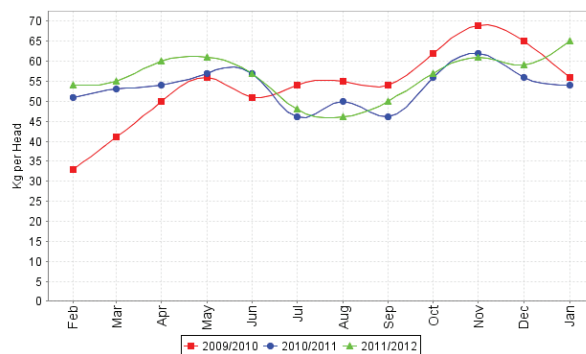
In the post *Deyr* 2011/12, the total rural population in the acute food insecurity phases of **Crisis** and **Emergency** is estimated at 65,000 people (50,000 in **Crisis** and 15,000 in **Emergency**). This indicates an improvement from post-*Gu* 2011, when numbers of affected population were almost double of the current figures (133,000 people). Coastal *Deeh* remains in **Emergency** while Nugal Valley and Sool Plateau are in **Crisis** as in the post *Gu* 2011. However, all the other livelihoods in the Northeast (Hawd, Addun, Karkaar/Dharoor and East-Golis) have improved from **Crisis** to **Stress** in the post *Deyr* 2011/12 season. Following the decrease in the cost of living, the number of people in crisis in the urban areas has reduced by 30 percent since the previous phase, standing at 60,000 people in post *Deyr* 2011/12.

An improvement in the food security situation is observed in most rural livelihoods of the Northeast regions (Hawd, Addun and parts of Dharoor/Karkaar and EastGolis). The factors that contributed to the improvement are improved frankincense production/exports in East Golis with activities to be continued through July 2012; enhanced livestock production and reproduction; increased income from livestock sales, particularly during the *Hajj* period; strengthened ToT between rice and local goat due to increased goat prices and relatively stable rice prices; and increased humanitarian access. However, the food security situation of the poor pastoral households in Coastal *Deeh*, Nugal Valley and Sool Plateau remain unchanged due to the negative impacts of previous drought episodes that resulted in drastic livestock asset losses (Figure 15). As a consequence, poor households have limited number of saleable animals and are highly indebted (USD350). A decline in the fishing activities is also observed in this period likely due to the increased anti-piracy activities at sea and instability in the main export markets (Yemen). In Coastal *Deeh*, high pastoral destitution has been reported since *Deyr* 2010.

Generally, the conception rates of small ruminants is medium in most livelihoods, hence an increase in herd holdings is projected by end June 2012, with the exception of Coastal *Deeh* where the conception rates of small ruminants is low. Camel conception was low to medium during *Deyr* 2010 season, resulting in low camel calving rate this season in most livelihood zones of the region. Therefore, milk available for sales is minimal in the region. However, due to the medium goat kidding rate in this season, households have access to milk for own consumption. The same is expected in the projected period (June '12).

The current Post *Deyr* 2011/12 nutrition situation depicts a general improvement in the nutrition situation in most of the livelihood zones compared to the *Gu* 2011 season. The nutrition situation has improved in the populations of Sool plateau, Addun, and Coastal *Deeh* livelihood zones from **Critical** in *Gu* 2011 to the current **Serious** phase. A significant improvement is also noted in the Nugal Valley livelihood zone where the situation was classified as **Very Critical** in *Gu* 2011 to **Critical** in the current season. The nutrition situation has however slightly deteriorated in the East Golis/ Karkar and Hawd pastoral livelihoods from **Serious** to **Critical**. These deteriorations are predominantly linked to the limited access to milk, poor dietary diversity following the effects of previous consecutive poor seasonal performance and disease in these livelihood zones. The WHO/MoH reported acute watery diarrhoea and cholera outbreaks in the Hawd areas of Galkayo district that aggravated the situation but considering food security indicators are showing an improving trend, the situation has a potential to improve.

Figure 16: Terms of Trade between Local Quality Goat rate to Imported Red Rice (1Kg) in Northeast Regions



As a consequence, poor households have limited number of saleable animals and are highly indebted (USD350). A decline in the fishing activities is also observed in this period



Improved goat body conditions Addun, Jariban, Northeast, FSNAU, December, 2011

Northwest Regions

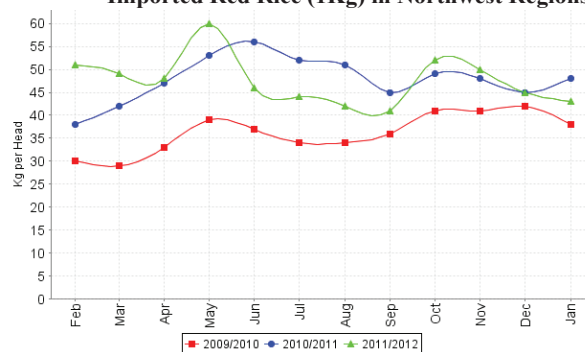
The food security situation has improved since *Gu* 2011 in the most livelihoods of Northwest following a positive impact of average *Gu* 2011 and near normal *Deyr* seasons and increased humanitarian interventions, particularly in Sool Plateau. The improvements are visible in pastoral livelihoods of Hawd (Togdheer, Sool), Sool Plateau and East Golis in terms of increased milk availability (Hawd and Agropastoral) following high kidding among small ruminants, improved income from livestock sales and strengthened purchasing power of market-dependent pastoralists given high livestock prices. However, Sool Plateau and Nugal valley of Sool and Sanag regions are still in **Crisis**, due to the effects of previous drought seasons reflected in reduced livestock assets and high indebtedness (300-350\$) of poor pastoralists. The key pastoral and agropastoral livelihoods of W.Galbeed and Awdal regions where livestock and crop production is good owing to average rainfall performance over the last three seasons remain in the **Stress** phase. Currently (February 2012), a total of 90,000 people in rural areas are estimated to be in **Crisis** (83%) and **Emergency** (17%) phases, indicating a 44 percent decrease in the number of affected population since *Gu* 2011 (160,000 people). Sool Plateau pastoral has improved from **Emergency** to **Crisis**, largely due to high humanitarian interventions, Nugal valley remains in **Crisis** as in the post *Gu* 2011, Hawd and East-Golis have improved from the **Crisis** to **Stress** phase, while all agropastoral livelihoods remain in **Stress** phase. A total of 40,000 urban people are in the **Crisis** phase, which is 20 percent less than in *Gu* 2011 (50,000 people).



Good Sheep and Goat body condition, Hawd of Hargeisa, FSNAU, December, 2011

The main contributing factors of the improved food security situation of pastoral livelihoods of the Northwest include increased own food production (livestock and crops) and improved access to markets as a result of strengthened purchasing power. Livestock reproduction and production (goat milk) is average as a result of medium conception of small ruminants during *Gu* 2011. However, camel milk production is below average due to low calving rate this season, as a result of poor conception in the past one year. Herd sizes in most pastoral livelihoods are expected to increase in the projection period (June 2012), although will remain below baseline levels in key pastoral livelihoods of Nugal valley, Sool Plateau, East-Golis and Hawd (Togdheer and Sool regions). Conversely, the herd size of poor pastoralists in Hawd of Hargeisa and West Golis/Guban is expected to improve to near/ or above baseline levels due to gradual improvements in the last three seasons.

Figure 17: Terms of Trade between Local Quality Goat to Imported Red Rice (1Kg) in Northwest Regions



Following favourable *Gu/Karan* 2011 rains considerably above average crop harvest was collected in November 2011 in the agropastoral livelihoods (308% of PWA and 225% of the five year average). However, limited local cereals entered into the main markets of Northwest regions by December 2011 as mechanized threshing of cereals was still going on after the harvest. As cereal supply was also low from southern Somalia and Ethiopia, local cereal prices (white sorghum) in the main markets of Northwest regions indicated an increasing trend in December 2011. However, in January 2012 the sorghum prices started to decline (19% decline from Dec '11) as more cereals started entering the market. However, the price of local cereal (white sorghum) is still higher compared to a year ago. Conversely, the imported cereal prices (rice) showed a declining trend in the same period, indicating an improvement in the purchasing power of poor households across the livelihoods of the northwest regions.

The Post *Deyr* 2011/12 integrated nutrition situation analysis shows improvements in most of the Northwest livelihood zones while in others, the situation is in a sustained phase since the *Gu* 2011. The only exception is Hawd pastoral livelihood which indicate significant deterioration from *Alert* phase in *Gu* 2011 to **Serious** currently. In the West Golis and Nugal Valley livelihoods zones, the nutrition situation has improved significantly, from the *Very Critical* phase in *Gu* 2011 to **Serious** and **Critical** levels respectively, while in Sool Plateau livelihood zone, there are improvements to the **Serious** phase, from **Critical** in the *Gu* 2011. The populations in the agro-pastoral and East Golis/Gebi Valley livelihood zones show a sustained **Serious** nutrition situation since *Deyr* 2010/11.

The improvements recorded in the respective livelihoods is mainly attributed to improved milk access at household level, and declining morbidity levels to seasonal norms. On the other hand, the nutrition situation among the population in the Hawd livelihood has significantly deteriorated from the *Alerts* levels in *Gu* 2011 to the current **Serious** levels. This is mainly attributed to reduced milk access at the household levels following opportunistic livestock out-migration to

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