FSNAU
Food Security and Nutrition Analysis Unit - Somalia

Food Security & Nutrition

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Quarterly Brief - Focus on post-*Deyr* 13/14 Season Early Warning

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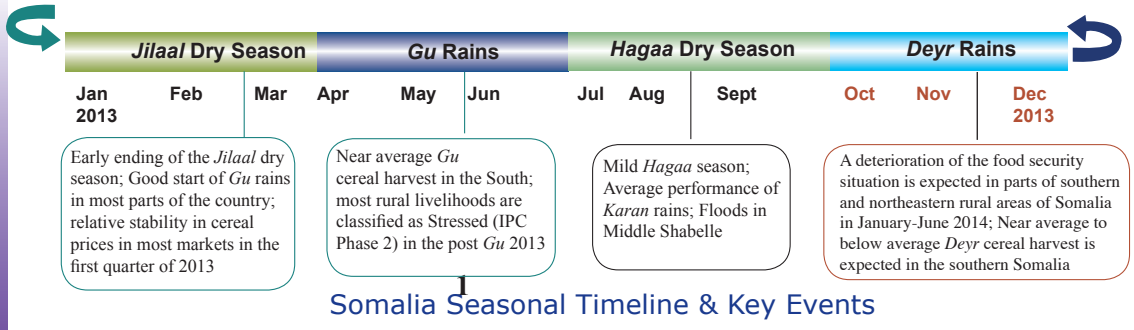
KEY ISSUES

Based on the Food Security and Nutrition Analysis Unit's (FSNAU) preliminary forecast, a deterioration of the food security situation is expected in parts of southern and northeastern rural areas of Somalia. In these areas, based on the Integrated Phase Classification (IPC) food insecurity severity scale, the current number of people in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) is likely to increase in the first half of 2014. However, most livelihoods are still expected to remain as **Stressed** (IPC Phase 2).

Parts of Bari and Nugaal regions in the Northeast (Bandarbeyla, Eyl and Dangorayo districts), which were hit by a devastating tropical cyclone (November, 2013) are likely to be in **Crisis** (IPC Phase 3) or **Emergency** (IPC Phase 4). The areas in the southern regions, where deterioration is likely in the post *Deyr* 2013/14 (January-June 2014) include parts of the agropastoral livelihoods of Middle Juba (Sakow district), Lower Shabelle (coastal areas) and Hiran (Beletweyne district) regions as well as parts of riverine areas of Middle Shabelle and Lower Juba regions. The anticipated deterioration is due to the adverse impact of floods (Shabelle and Juba), clan conflict (Middle Shabelle) as well as poor performance of the *Deyr* rainy season (October-November 2013) in parts of the southern regions. These hazards affected crop production, caused population displacement and livelihood disruption. A majority of Internally Displaced Persons (IDP) in the settlements are expected to remain in food security crisis (IPC Phases 3 or 4). Recent nutrition survey (December 2013) results indicate ***Serious*** nutrition situation in Hargeisa and Burao IDP settlements and ***Critical*** nutrition situation in Berbera and Galkayo IDP settlements. No major disease outbreaks were reported in the country, apart from polio outbreak in southern Somalia. The food security situation is likely to be classified as **Stressed** (IPC Phase 2) in most urban areas in the post *Deyr* 2013/14 due to anticipated relative stability of food prices and purchasing power.

Overall, the *Deyr* 2013 cereal harvest is expected to be near to below average. Early estimations provide that about one-quarter of farming households in southern Somalia (in the regions of Lower and Middle Juba, Lower and Middle Shabelle and Hiran) are likely to receive poor cereal harvest. Of particular concern are farmers in the riverine livelihood of Jowhar (Middle Shabelle) and agropastoral livelihood of Sakow (Middle Juba) districts where most poor farmers are likely to miss out about five months of cereal supplies due to anticipated poor *Deyr* harvest. Further, these livelihoods as well as agropastoral livelihood of Beletweyne district (Hiran) are not expected to benefit from off-season *Deyr* harvest. Although the impact of crop failure is less severe in Beletweyne where population is more livestock-dependent, poor consecutive rainy seasons will prolong the recovery of poor households in this livelihood from their current (August-December 2013) **Crisis** (IPC Phase 3) situation. Conversely, good off-season harvest is expected in March-May 2014 in parts of the high potential crop-growing riverine areas of Juba and Shabelle regions (Afgoye, Kurtunwarey and Balad) with bleak *Deyr* harvest outlook. Also, farm labour opportunities during the next agricultural season (April-June 2014) may mitigate, to some extent, the situation of poor farmers in coastal areas of Lower Shabelle where *Deyr* crop harvest is expected to be poor. Therefore, food security crisis is expected to be short-term (January-March 2014) in the riverine (Juba and Middle Shabelle) and coastal agropastoral areas (Lower Shabelle).

Most pastoralists, apart from northeastern cyclone-affected areas that caused substantial livestock losses are projected to remain as **Stressed** (IPC Phase 2) due to persistent below normal livestock assets despite likely normal rangeland conditions, normal livestock production and favourable livestock selling prices in the next six months. Poor rains in pastoral areas of Juba and southern parts of Gedo regions had less effect on pasture resources although the pastoralists may experience water shortages in the second half of the long *Jilaal* (January-March 2014) dry season with minimal adverse impact on food security situation of pastoralists in these regions.

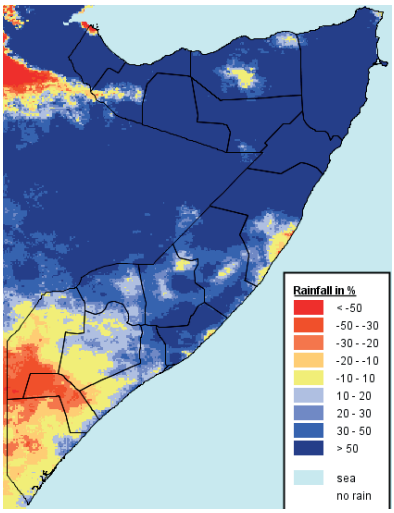


Somalia Seasonal Timeline & Key Events

SECTOR HIGHLIGHTS

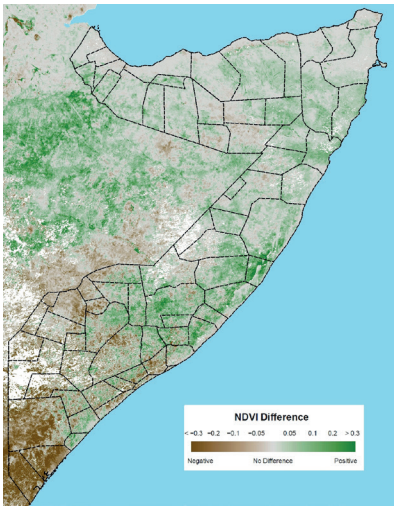
CLIMATE

Map 1: Rainfall Percent of Normal 1st Oct – 10th Dec 2013



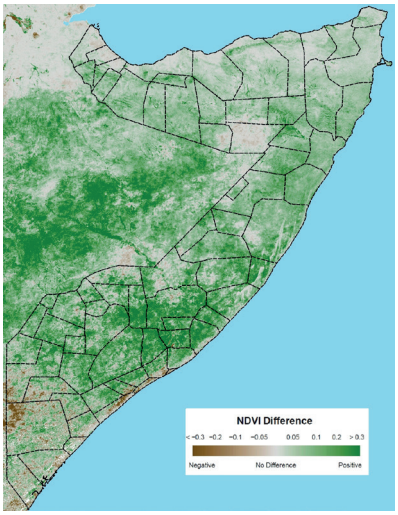
Source: JRC-TAMSAT

Map 2: NDVI Anomaly Nov 1-10, 2013



Source: E-MODIS

Map 3: NDVI Anomaly Dec 1-10, 2013



Source: E-MODIS

The overall *Deyr* 2013 season rainfall performance was mixed in terms of the amount, coverage, temporal and spatial distribution across the country. The rains were ranging from normal to above normal in the northern regions, parts of the central regions, and the southern regions but they were below normal in large areas of Juba, some parts of Gedo, Lower Shabelle and Hiran regions. The tropical cyclone that hit the northeastern parts of Somalia (Bari and Nugal regions) on November 12, 2013 led to flash floods and cold weather, impacting more severely parts of Banderbeyla, Eyl and Dangorayo (Qardo) districts. The above normal rains in the upper Shabelle and Juba river catchments in Ethiopia (*Kiremt* rainy season in June-September 2013) led to river floods in Jowhar and Balad districts of Middle Shabelle (from August 2013 onwards), Afgoye district (Lower Shabelle) and riverine livelihood zone of Juba regions (from late October to November 2013).The Normalized Difference Vegetation Index (NDVI) for the third *dekad* of November 2013 depicts good vegetation conditions in most parts of Somalia with some decreases from normal in rain deficit areas of Juba and Gedo regions. The 7-day rainfall forecast ending 23 December 2013 shows drier weather conditions in most parts of the country, which indicates end of the *Deyr* rainy season. The perfomance of *Deyr* season rainfall in various parts of Somalia is summarised below:

- In most of the southern regions, the *Deyr* 2013 rains started on time but were poor in terms of intensity, distribution and frequency during October 2013. However, rains intensified as the season proceeded into November 2013. In October–December (*dekad* 1), 2013 rainfall in the regions of Middle Shabelle, parts of Bakool and Hiran, and some parts of Lower Shabelle region exceeded 150 percent of the Long-Term Mean (LTM). The rains were also above normal (in the range of 110 to 130 percent of LTM) in most parts of Bay, Bakool, Lower Shabelle and northern Gedo, as well as in localized areas of Lower and Middle Juba regions (Map 1). Below average rainfall (70-90% of the LTM) was recorded in most areas of Lower and Middle Juba and in the southern parts of Gedo.

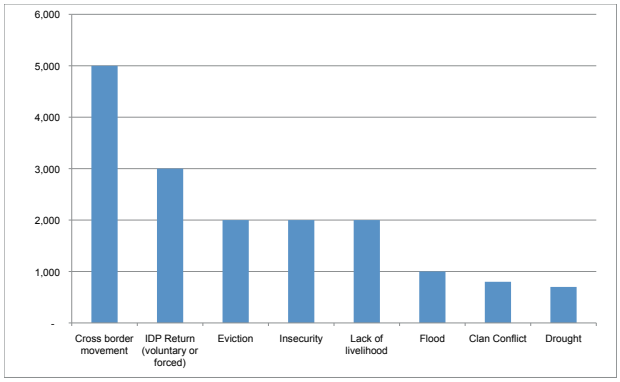
- In the northern region, the *Deyr* 2013 rains started in early October 2013 and as the season advanced, the rains became moderate to good, consistent and widely distributed in all livelihoods. Unusual moderate rains precipitated across the West-Golis and Guban pastoral livelihoods of the Northwest region, which generally improved pasture and water conditions. Tropical cyclone hit parts of Eyl, Banderbeyla and Dangorayo districts of the Northeast region, thereby causing flash floods. Most areas of the Central region received near normal to normal rains, except some parts of the Hawd Pastoral and Adun Pastoral, where the short-lived rains were below normal to near normal.

- The E-MODIS satellite-derived NDVI anomaly for the first *dekad* of November 2013 indicates significant decrease of vegetation biomass due to poor rains in October (Map 2). However, NDVI anomaly for the first *dekad* of December 2013 indicates normal to above normal vegetation in many parts of the country attributable to above average rains in November. However, small to large decrease of biomass is evident in large areas of Lower and Middle Juba regions, in coastal areas of Lower Shabelle and southern parts of Gedo (Southern Inland Pastoral [SIP] livelihood). Depressed biomass is depicted in isolated pockets of Sool region, agropastoral areas in Bay and Hiran regions and SIP livelihood in Bakool (Map 3).

CIVIL INSECURITY

In the second half of 2013 (July - November) incidences of violence such as suicide bomb explosions, land mines, targeted killings, and armed confrontations, have continued in southern Somalia, particularly in Banadir, Hiran, Lower Juba, Gedo, Bay and Bakool. Most of these incidences were directed at the Federal Government of Somalia officials and their surpporters, while scores of civilians were either injured or killed. Resource conflicts mainly over agricultural land have been reported in Middle Shabelle (Jowhar district) and Hiran regions. Political tensions and clan-related conflicts have also persisted in Mudug and Sool regions.

Figure 1: Somalia Population Movement (Sep-Nov 2013)



Source: UNHCR *http://data.unhcr.org/horn-of-africa/country.php?id=197*

These conflicts have caused losses of lives and property, hampered agricultural activities (particularly during the critical crop planting and weeding phase) and led to population displacements. For example, clan-based resource conflicts in northeastern part of riverine of the Jowhar district (Middle Shabelle) affected about 28 villages. Trade and market activities were also affected in the South-Central region; for instance, the double taxation of goods moving from government-controlled areas to insurgent-controlled areas is reported, mainly in Juba, Gedo, Hiran and Bakool regions. In addition, clan disputes in the Central region and parts of the Sool region restricted pastoral migration. Based on the report of the Office for the Coordination of Humanitarian Affairs (OCHA), humanitarian access remains extremely challenged by insecurity in areas of South-Central Somalia under the control of insurgents (*Source: Somalia: Humanitarian Dashboard, October 2013, issued on 27 November 2013*).

United Nations High Commissioner for Refugees (UNHCR) estimates for November 2013 indicate that there are approximately 1.1 million of IDPs across Somalia. The UNHCR-Somalia Displacement Portal (*http://data.unhcr.org/horn-of-africa/country.php?id=197*) estimates movement of about 16 400 people within Somalia between September and November 2013. Cross-border movements (30%) and IDP return (17%), most of which was a voluntary return, accounted for almost a half of these movements (Figure 1). Most of these reported movements occurred from the regions of Banadir, Lower Juba, Gedo, Shabelle and Bay.

The current level of insecurity is likely to be sustained in parts of the South-Central region for most of 2014 as military confrontations (between insurgents and the Federal Government supported by the African Union Mission in Somalia) are expected to continue.

AGRICULTURE

In this 2013 *Deyr* season, the area planted under cereals (sorghum and maize) varies from below average to near average in most of the southern regions[1]. Maize planted areas are below average in the Shabelle and Juba regions due to poor *Deyr* rains at the beginning of the season (October 2013), floods, clan-conflict (Middle Shabelle) and increased planting of highly valued sesame in lieu of maize (Lower Shabelle region). Floods in Juba regions were mostly human-induced for the purpose of recessional cultivation in *desheks* in order to benefit from off-season harvest (likely March-May 2014). However, floods in Shabelle regions occurred naturally and led to inundation of an estimated 12 000 hectares of farmland.

The sorghum planted area is slightly below average due to a delay in the start of the *Deyr* 2013 rains (i.e. from the first *dekad* of November 2013). Most of the planted maize and sorghum in the South is expected to be harvested with some delay, in the period January-February 2014. Most of the sesame planted in November 2013 in large parts of Lower Shabelle and Bay is expected to be harvested in February 2014. Significant off-season harvest is expected from end of March 2014 up until May 2014 in the flooded areas of Balad (Middle Shabelle), Kurtunwarey[2]/Afgoye (Lower Shabelle) districts and Juba *desheks*. The outlook for the *Deyr* 2013/14 sorghum harvest is near average, while maize harvest is likely to be below average. The major cereal producing southern regions of Bay (sorghum producer) and Shabelle (maize producer) are expected to recieve near average and below average *Deyr* cereal harvests, respectively.

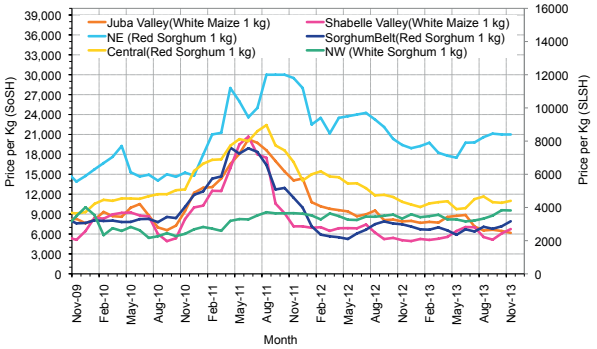
1 In the past two years average *Deyr* planted area under cereals was estimated at about 270 000 Ha

2 In Kurtunwarey district of Lower Shabelle floods occurred during the last *Gu* 2013 season and water pools are still evident in the farmlands of Alla-fuuto, Lafoole and Duuray villages.

The areas, which are likely to receive poor harvest or experience crop failure as a result of inadequate rainfall and floods include: large parts of high potential sorghum-producing Southern Agropastoral livelihood (Middle Juba); Hiran Agropastoral livelihood (particularly Beletweyn district); most of the maize-producing agropastoral areas of the Jammame district (Lower Juba Agropastoral) and some parts of maize producing riverine districts of Shabelle valley (Jowhar, Balad, Kurtunwarey and Afgoye) and maize-producing agropastoral livelihood of Lower Shabelle (along the coastline). In the Northwest Agropastoral, the *Gu-Karan* 2013 cereal (yellow maize and white sorghum) harvest is expected to be near average according to the preliminary results of the recent FSNAU-led crop assessments (November-December 2013) carried out in Hargeisa, Gebiley, Baki, Borama and Awdal districts using the Pictorial Evaluation Tool (PET). Similarly, average cowpea production is expected in the Cowpea Belt of the Central regions.

Over the last five months (July-November 2013) maize prices exhibited a decline (5-15%) in most of the southern regional markets, while sorghum prices increased (by 20-30%) in the Sorghum Belt regions of Bay, Bakool and Gedo. This trend is attributable to below average sorghum and average maize harvests in *Gu* 2013. White sorghum price also shows increase (19%) in the Northwest due to delayed *Gu/Karan* harvest and lack of supplies on the markets where new stocks are yet to arrive (Figure 2).

Figure 2: Monthly Trends in Local Cereal Prices



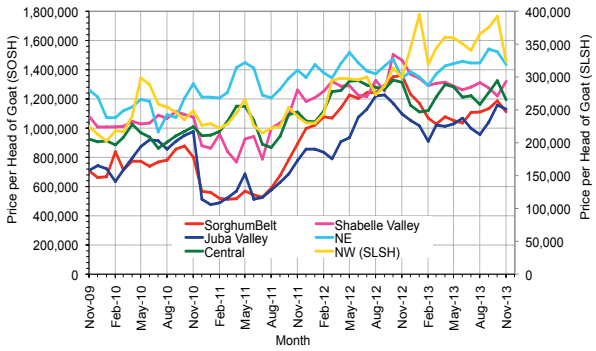
Maize devastated by floods. Afgoye, Lower Shabelle, FSNAU, November 2013

LIVESTOCK

Apart from some parts of the Northeast region (Eyl, Dangorayo and Bandar beyla districts) that were hit by a destructive natural hazard (cyclone storms/floods), the seasonal performance in most pastoral and agropastoral livelihoods of the country was positive, mainly characterized by enhanced rangeland conditions leading to increased livestock production, reproduction as well as sales.

Pasture, browse and water conditions are ranging from average to above average in most of the Northern regions, due to an average to above average *Gu* 2013 season, *Karan* and ongoing *Deyr* rains. In the Northeastern region, the cyclone tropical storm and floods led to large losses of livestock and the spread of diseases in the affected pastoral communities in parts of Coastal *Deeh*, Sool Plateau and Nugaal livelihood zones. In the southern and central regions, *Deyr* rains in October-November, 2013 improved pasture, browse and water in most parts. Exceptions are large parts of Lower Juba (parts of Southeast Pastoral, Juba Agropastoral and Southern Inland Pastoral), coastline of Lower Shabelle and pockets of Central regions (Hawd/Addun), where pasture and water remains below average due to poor and erratic *Deyr* 2013 rains. In the Juba regions, sufficient dry pasture is available from the last *Gu* 2013 season but the concern is likely to be water shortage in the remote pastoral areas. In some parts of the Central region, pasture and water is expected to reduce drastically in the second half (February-March, 2014) of *Jilaal* dry season. Currently livestock migration is normal across the country. Livestock body conditions for all species remain near

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



normal to above normal (score 3-4 on a 5-point Pictorial Evaluation Tool [PET] scale for livestock) across the country as a result of improved rangeland conditions. Medium cattle calving, goat/sheep kidding/lambing and low camel calving is progressing in the course of the *Deyr* season (October - December 2013). Consequently, milk production is normal.

Average cattle body condition. Jowhar, Middle Shabelle, FSNAU November 2013

Livestock prices were either stable or increased in Hiran, Central and Northern regions during the July – November 2013 period due to high demand during the *Hajj* festive period. In southern Somalia livestock prices showed mixed trends, particularly for goats, while cattle prices mostly increased in the same period. The yearly comparisons of livestock prices in most markets indicate stable or increasing trends for all species (Figure 3). In September 2013, Berbera and Bossaso ports exported 1 146 428 heads of livestock (sheep, goat, camel and cattle), of which 83 percent were transported through Berbera port. These export figures represent almost a three-fold increase in exports compared to a year ago (375 654 heads in September 2012). Bossaso port statistics for October 2013 shows exports of 259 595 heads of livestock, which is higher (35%) than preceding month (192 944 heads) due to peak *Hajj* season. This is slightly lower (2%) than October 2012 exports. Livestock exports data for October 2013 is not yet available from Berbera port.

MARKETS AND TRADE

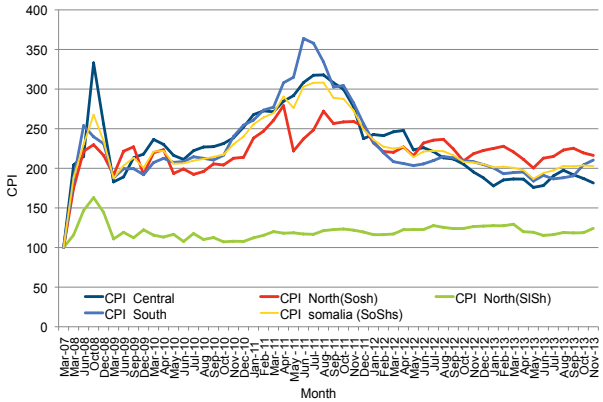
Exchange Rate Trends

From July to November 2013, the Somali shilling (SoSh) depreciated slightly against the the United States dollar (USD) in most markets of the southern regions. At the end of November 2013, open air retail markets in the Banadir region, for example, quoted the SoSh at 21 035 per the USD, slightly depreciated from the July level of 19 240 on account of the volatile political environment in Mogadishu. The Somali shilling was however, stable in the Central and Northeast regions. The SoSh appreciated between 4 and 8 percent against the USD when compared to November 2012. The Somaliland shilling (SlSh) to USD exchange rate was fairly unchanged in most markets of the SlSh zone including Hargeisa, Burao, Borama and Togwajale in the last five months (Jul-Nov 2013) as well as over the past year.

Cereal Imports and Commodity Price Trends

The prices of most essential imported commodities such as rice, sugar, wheat flour, diesel and vegetable oil have increased moderately from July–November, 2013 in the southern region markets, mainly due to the slight depreciation of the Somali shilling against the dollar. In the other areas where the Somali shilling is mostly used (Central and Northern regions), imported goods' prices have either remained stable or decreased modestly. Annual price changes recorded in November 2013 indicate a significant decline in the prices of the imported food commodities in markets where the Somali shilling is used. In the Somaliland shilling markets of the Northwest, prices of the above-mentioned imported items were relatively stable between July 2013 and November 2013. However, compared to Nov 2012, the prices of sugar, wheat flour and vegetable oil in Nov 2013 declined slightly (by 6-8%), while rice and diesel remained stable. In both, the SoSh and SlSh areas, import commodity prices were influenced by sustained imports, improved port capacity, including rehabilitation of the Berbera, Bosasaso and Mogadishu ports, the stable/declining prices on the world markets and local currency exchange rate trends. In the port markets of Berbera, Bossaso and Mogadishu, the price movements for most imported commodities have, by and large, continued to follow international price trends.

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



Consumer Price Index (CPI)

From July to November 2013, the Consumer Price Index (CPI), measured through the changes in the cost of the Minimum Expenditure Basket (MEB), rose (by 7-13%) in urban markets of the country. The increase was due to seasonal peak in the price of sorghum, a key commodity in the basket. However, over the past one year, the cost of the basket decreased significantly in the Central region while it remained stable elsewhere (Figure 4).

NUTRITION

A review of the nutrition screening and health data from Ministry of Health (MoH) and health facility partners from August to October 2013 as well as contextual information indicate likely sustained *Serious* to *Critical* levels of acute malnutrition levels across Somalia up to the end of December 2013.

The analysis show a stable nutrition situation in the Northwest region with likely *Serious* level of acute malnutrition in Hawd, East Golis, and West Golis, Nugal valley and Sool livelihoods and an *Alert* level in Northwest Agropastoral. The stable nutrition situation in Northwest is mainly linked with improved access to food, especially milk.

Similarly, health facility data from Northeast and Central livelihoods show stable nutrition situation with likely *Serious* levels of acute malnutrition sustained in Nugal valley, Sool Plateau and Hawd of Central; a stable *Critical* level of acute malnutrition in Coastal *Deeh, Cowpea* and East Golis livelihoods. The stable or improving nutrition situation is also attributable to improvements in food security indicators in most livelihoods on account of favourable good *Deyr* 2013 seasonal performance. However, the recent cyclone that affected coastal areas of the Northeast is likely to negatively influence food security situation, which in turn could cause a deterioration of the nutrition status of the affected population. These will be assessed in the forthcoming FSNAU-led nutrition assessment in December 2013. Data from health facilities in Addun livelihood of Northeast and Central regions indicate a deteriorating trend, hence likely *Serious* nutrition situation in line with seasonal trends of malnutrition in the livelihood.

A stable nutrition situation is projected in southern Somalia, where *Critical* levels of acute malnutrition is likely to sustain through December 2013 in pastoral (Dawo), agro-pastoral and riverine livelihoods of Juba and northern Gedo; *Very Critical* levels in all livelihoods in southern part of Gedo region, Beletweyne district of Hiran region and Bay Agropastoral; and *Serious* levels in Juba pastoral livelihood and Mataban district of Hiran region.

So far, available health reports for August to October 2013 from MOH/Partners do not show major disease outbreaks in the country, with the exception of polio outbreak in southern Somalia. The absence of disease outbreak and improved access to food, especially milk has contributed to the stable nutrition situation. However, the on-going FSNAU-led nutrition assessments in IDP settlements and rural livelihoods will provide more accurate information on the prevailing nutrition situation across the country.

The recent IDP nutrition surveys indicate ***Serious*** nutrition situation in Hargeisa and Burao IDP settlements and ***Critical*** nutrition situation in Berbera and Galkayo settlements (Table 1).

Table 1: Summary of IDP Survey Nutrition Results

IDP Settlement location	Global Acute Malnutrition Rates		Nutrition Situation Classification
	June-July 2013	Dec-13	
Hargeisa	18.2 (14.3-23.0)	10.6 (7.6-14.6)	***Serious*** (improved from *Critical* in June-July 2013)
Burao	14.2 (11.5-17.5)	10.0 (7.3-13.7)	***Serious*** (sustained since June-July 2013)
Berbera	10.8 (8.7.13.5)	16.1 (12.7-20.2)	***Critical*** (deterioration from *Serious* in June-July 2013)
Galkayo	19.4 (17.0-21.1)	15.0 (12.5-17.8)	***Critical*** (sustained since June-July 2013)

More detailed information will be available in the Nutrition Update to be published in January 2014.

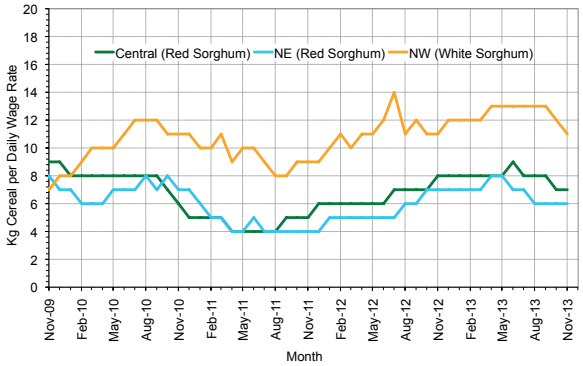
INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In the post-*Gu* 2013 season (August-December 2013), all urban areas of Somalia are classified as **Stressed** (IPC Phase 2) with a total of 775 000 people **Stressed** (IPC Phase 2) and 45 000 people in Bari, Lower Juba and Hiran in **Crisis** (IPC Phase 3). An estimated 625 000 people in major IDP settlements were classified as **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4). IDPs represented 72 percent of the total of 870 000 people in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) in Somalia for the period August-December 2013.

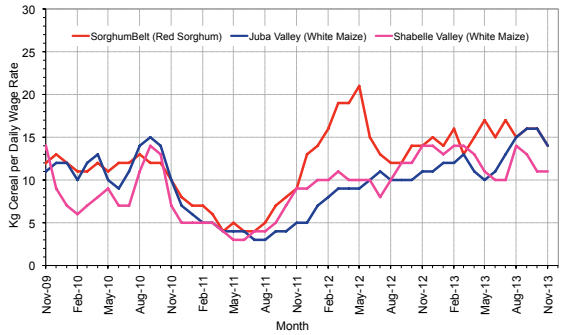
The food security conditions of urban and IDP populations are largely determined by the trends in the cost of the MEB and the purchasing power due to their high market-dependency. For IDPs, access to humanitarian assistance also represents one of the major contributing factors to changes in their food security status.

Figure 5: Regional Trend in Terms of Trade between Daily Labour Wage and Cereals (Central and North)



Cost of the MEB in local currency terms in the last four months indicate a relatively stable or slightly declining trend in most regions of Northeast, Central, Bay, Hiraan and Mogadishu. However, the cost of the MEB increased significantly (13-21%) in all other regions of the South on account of seasonal increases in local cereal prices. In November 2013, the highest MEB costs in dollar terms were predominant in the Northern areas with Sanaag (USD 211) topping the statistics while the lowest were in the South with Bay at the bottom (USD 77). Compared to November 2012, the MEB cost was lower (3-18%) in most regions due to lower prices of local and imported food. Conversely, the MEB cost was elevated in Lower Shabelle (7%), Lower Juba (9%), Wooqoi Galbeed (12%) and in Middle Shabelle (20%) mainly due to rising sorghum prices (Figure 6) [See Agriculture sector].

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



Seasonal agricultural activities in towns surrounding cropping zones[3] have resulted in increased agricultural labor opportunities and higher wages in November 2013 compared to July 2013. Labour wages also increased (20%) in Mogadishu town due to intense ongoing construction works and other infrastructure rebuilding activities. However, significant decrease in wage rates was noted in Gedo (11%) and in the riverine towns in Juba (19%) and Middle Shabelle (37%) where farming activities were curtailed by floods (see Agriculture Sector). Labour wage rates also reduced in the Central region (14%) but remained stable in Northwest and Northeast regions. Compared to a year ago (November 2012), labour wage rates are significantly higher in most markets except for a slight decline in the Central region (7%) and relative stability in Gedo, Juba, and Northeast regions.

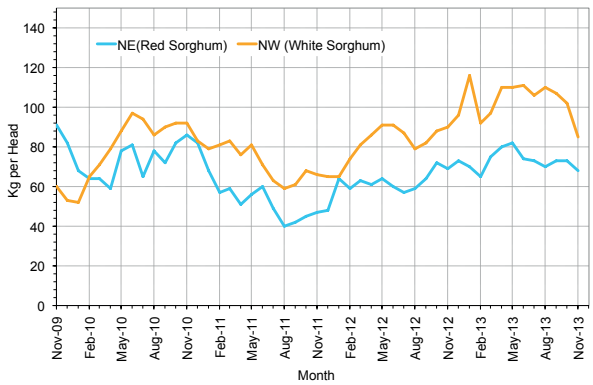
For the period July-November 2013 purchasing power, measured through Terms of Trade (ToT) between casual labor wage and most commonly consumed cereals declined (by 1-5 Kgs of cereals per daily wage) in most regions. Exceptions are Shabelle and Juba Regions with one unit increase in ToT and Banadir with eight unit increase. The decline was due to seasonal cereal price increases. In November 2013, the highest ToT was recorded in Mogadishu (27 Kg/daily wage) while the lowest was in Northeast (6 Kg/daily wage). Compared to a year ago (November 2012), ToT is lower (by 1-4 Kgs) in all regions except some increases (3-4 Kgs) in Juba and Banadir. The highest decrease in ToT over the past 12 months was in Bay and Hiran, mainly as a result of rising cereal prices. The increase in ToT, on the other hand, was driven by a combination of increased labour wages and reduced cereal prices (Figures 5 and 6).

RURAL

Northern regions

In the post-*Gu* 2013 season (August-December, 2013), the food security situation in all rural livelihoods of the North is classified as **Stressed** (IPC Phase 2). In total, 399 000 in the Northern regions were classified in **Stressed** (IPC Phase 2), 15000 in **Crisis** (IPC Phase 3) and 12 000 destitute pastoralists in **Emergency** (IPC Phase 4). Majority of these population groups are located in Northwest.

Figure 7: Regional Trend in Terms of Trade Goat Local Quality and Cereals



As a result of good *Gu* 2013 rains, prolonged *Karan* and above average *Deyr* 2013 rains in September-November, 2013 currently pasture/browse and water conditions are good across the northern regions. Consequently, normal livestock migration within the normal wet grazing areas was reported in all livelihood zones of the northern region. Following the good seasonal performance, livestock body conditions of all species ranges from average to above average (PET score of 3-4), across the pastoral livelihoods in the north. Livestock reproduction is medium to low for camel and medium for goats and cattle, owing to medium/low conception of camel in *Deyr* 2012 and medium conception of goats in *Gu* 2013. Goats started kidding in October 2013, while camel calving started in November 2013. However, goat abortion has been reported in the Hawd livelihood zone of Togdheer and Sool Plateau of Sanaag due to the impact of diseases, which might reduce kidding rates. Milk production for all species ranges from average to near average with a noted improving trend in most of the Northern regions.

[3]Lower Shabelle, Bay, Cowpea Belt (Galgadud & Middle Shabelle regions), Northwest Agropastoral

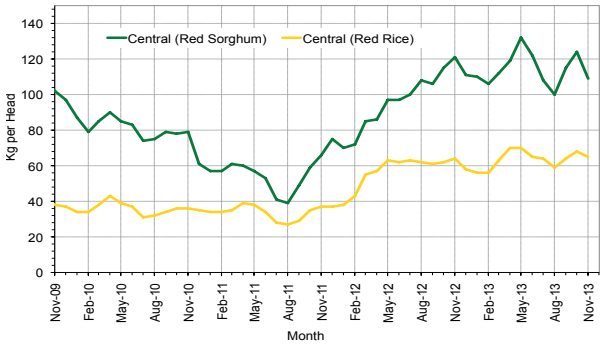
For instance, in November 2013 fresh camel milk price declined by 11 percent in the Northeast and by four percent in the Northwest compared to July 2013. However, fresh camel milk price in Wajaale market increased by 35 percent due to increased demand from the large number of military personnel deployed recently to strengthen the control at the border between Somaliland and Ethiopia. According to the recent FAO rapid assessment, pastoral communities in the districts of Northeast including Bandar-beyla, Eyl and Dangorayo districts (parts of Coastal *Deeh*, Sool and Nugaal livelihood zones) affected by tropical storm and floods in November 2013 (see Climate Article), have either partially or entirely lost their livestock. The cyclone/ floods have claimed human lives, caused the destruction of livelihood assets as well as infrastructure such as fishing gears, water sources, building, roads, etc. According to the assessment results, 20-40 percent of livestock was lost in the affected rural communities[4], while the remaining 60-80 percent of herds currently appear feeble due to the impact of the disaster and diseases (e.g. CCPP, PPR, pneumonia, etc.) [Source FAO Needs Assesment, November, 2013]. In the Northwest Agropastoral, the preliminary results of the recent FSNAU-led crop assessment (November-December 2013) conducted in Hargeisa, Gebiley, Baki, Borama (Awdal and Galbeed regions) estimated near average (W. Galbeed) to average (Awdal) *Gu-Karan* harvest of cereals (namely, yellow maize and white sorghum), mostly due to an increase in the planted area as well as favourable yields.

ToT between goat and rice exhibited mixed trends over the last five months (July-November 2013). For instance, in the Northeast, ToT increased by six percent (from 76 Kg to 81 Kg/head) following an increase of local quality goat prices and stable/ reduced rice price. However, in the Northwest region ToT declined by nine percent from 70 to 64 Kg/head) due to seasonal decline of goat price in November 2013. Yearly comparisons indicate an increase in the ToT in both regions. In November 2013, the highest ToT (117 Kg/head) was recorded in Bossaso (Northeast) market and the lowest (48 Kg/head) was recorded in the Zeylac market (Northwest) [Figure 7].

Central regions

In the post *Gu* season (August-December 2013), Coastal *Deeh* livelihood was classified in ***Crisis*** (IPC Phase 3), while the other three rural livelihoods (Hawd, Addun, Cowpea Belt) are classified in ***Stressed*** (IPC Phase 2). The estimates of rural people in ***Stressed*** (IPC Phase 2), ***Crisis*** (IPC Phase 3) and ***Emergency*** (IPC Phase 4) are equivalent to 81 000, 30 000 and 33 000, respectively.

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



Average camel body condition. Hawd, Hiran region, FSNAU, November 2013

Near average to average *Deyr* rains in October-November 2013 have improved water and pasture in large parts of the Central regions in the livelihoods of Coastal *Deeh,* Cowpea, and parts of Addun and Hawd. Despite the below average rainfall in other parts of Hawd and Addun, overall pasture and water improved in these livelihoods. However, water catchments were not fully replenished, which may result in water shortages during the next long *Jilaal* dry season. Currently, livestock migration pattern is normal, mostly within the same livelihoods. Livestock body condition remains largely normal in most livelihoods of the Central regions (PET score 3). Medium kidding/ lambing of goats and sheep in September-October 2013 and increased milk yield of lactating camel, contributed to improved milk availability, which is reflected by a slight decrease in milk prices (5%) between July and November 2013. Medium conception rates of camel and sheep/goat was reported during the *Deyr* 2013 season. Field reports indicate that cowpea, which is a major crop in the Cowpea Belt livelihood zone (normally supports 3-4 months of food consumption for poor households), is well established in most areas. The exceptions are some parts of Elbur and Hobyo districts where cowpea production is likely to be below average due to inadequate rains. The outlook for sorghum crop in the Cowpea Belt livelihood zone is less favourable due to high incidences of crop pests (insects/diseases) in this *Deyr* 2013 season. However, sorghum is a marginal crop grown in the aforementioned livelihood.

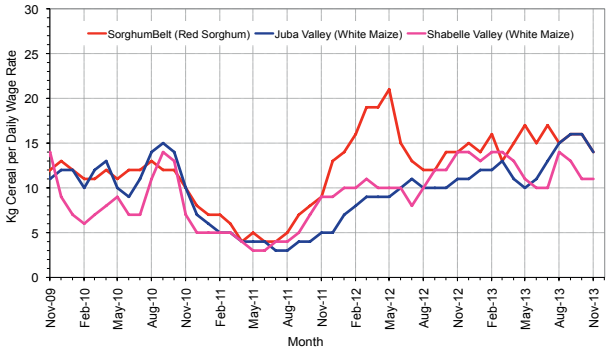
4 Affected villages by cyclone are Budun-buto, Qarxis, Eel-madoobe,Eel-dhidir, Garmaal, Mareeyo, Baq-Baq , Tebin, Eel-weel and Uusgure

ToT between local quality goat and cereals (rice) improved over the last five months (July-November 2013) in most markets of the Central regions with the highest increase (i.e. 22%; or 17 Kgs of cereals per head) recorded in Galkáyo. The ToT improvement is attributable to increased local quality goat price due to *Hajj* demands and a cereal price decline. In November 2013, the highest ToT was (96 Kgs of rice/head) recorded in Galkaáyo and the lowest (50-51 Kgs of rice/head) was in Eldher and Dhusamareb districts due to insecurity and poor road access (mostly sand dunes). On an annual basis, the ToT remains stable in Abudwaq and Dhusamareb, declined in Eldher (7%) and Haradhere (by 15%) but increased (by 23%) in Galka'ayo (Figure 8).

Southern regions

In the post-*Gu* 2013 season, most rural livelihoods of the Southern regions were classified as **Stressed** (IPC Phase 2) apart from Hiran Agropastoral classified in **Crisis** (IPC Phase 3) and Southern Inland Pastoral (camel pastoralists) of the Lower Juba region classified in **Minimal** (IPC Phase 1). In total, 835 000 people were classified as **Stressed** (IPC Phase 2) and 60 000 in **Crisis** (IPC Phase 3) for the period August-December 2013.

Figure 9: Regional Trend in Terms of Trade Goat Local Quality to Cereal (South)



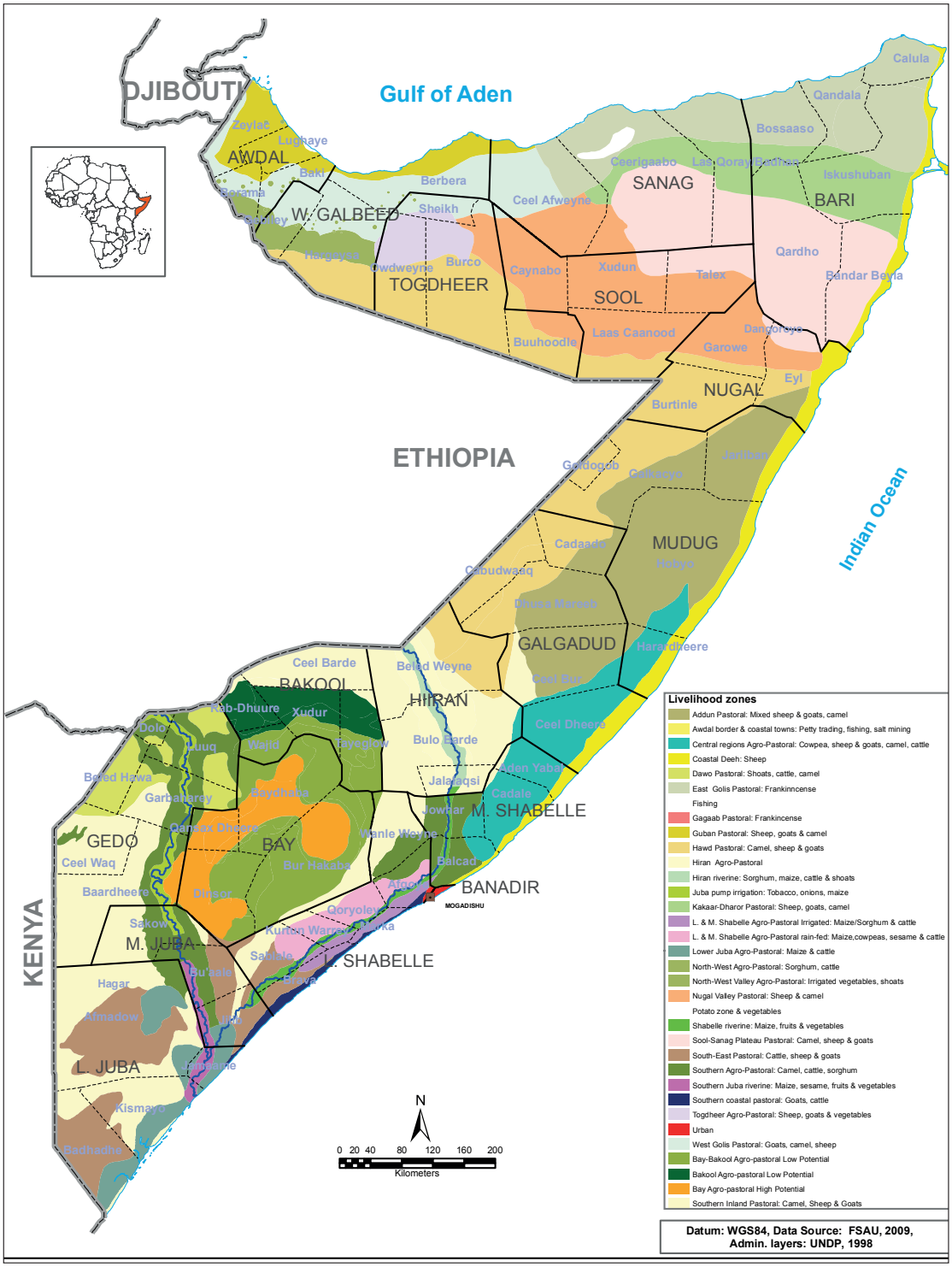
Good sorghum crop. Qansax-Dheere, Bay region, FSNAU, November 2013

The *Deyr* 2013 season was characterized by an erratic rain fall distribution at the start of the season (October 2013) and floods in parts of the South (Middle Shabelle, Lower Shabelle and Jubas). However, November 2013 rains have since improved crop prospects in many areas. Nevertheless, overall maize harvest is expected to be below average and sorghum is likely to be near average (see Agriculture sector). The areas with anticipated poor harvest include crop producing livelihoods in Juba regions, including Lower Juba Agropastoral (Jammame district) parts of Southern Agropastoral of Middle Juba, Hiran Agropastoral (particularly in Beletweyne) and the marginal crop producing agropastoral livelihood of Lower Shabelle (Agropastoral Maize Rainfed). On the other hand, Juba regions as well as parts of the flood-affected Shabelle regions are likely to benefit from the off-season cereal harvest in the period March-May 2014. For the year ending 2013, cereal stocks of the poor households have been exhausted in all areas apart from major cereal producing regions of Lower Shabelle and Bay, as well as the Juba regions, which received a good harvest in the recent *Gu* 2013 season. Prospects of below average *Deyr* 2013 season harvest imply reduced period of duration of cereal stock for poor farmers in the post *Deyr* 2013/14 period. To some extent, poor farmers may overcome this through farm labour opportunities during the next agricultural season (April-June 2014).

Increased demand for *Deyr* 2013 agricultural activities (planting/weeding) over the last three months (September-November 2013) contributed to the increase in labour wages in most agricultural areas. The ToT between labour wage and cereals exhibited mixed trends in July-November 2013 declining (by 1-4 Kg/ daily labour wage) in most Sorghum Belt Regions (Bay, Bakool, Hiran); increasing in Juba and Gedo regions (by 3-4 Kg/ daily labour wage) and remaining stable in Shabelle regions. Further, the ToT shows annual decreases across most regions apart from Middle Shabelle, which was stable. In November 2013, the highest ToT (23 Kg/ daily labour wage) was recorded in Bay, followed by Gedo (16 Kg/ daily labour wage), while the lowest was in Middle Shabelle (5 Kg/ daily labour wage).

In pastoral areas of the Southern regions, pasture, browse and water improved with the exception of Lower Juba (parts of Southeast Pastoral, Juba Agropastoral and SIP livelihoods), southern parts of Gedo regions (SIP livelihood) and along the coast of Lower Shabelle. Thus far, no abnormal livestock migration is reported and livestock body condition largely remains average to above average with a PET score of 3-4. Milk production, availability and access has improved over the last two months (October-November 2013) and is considered average, which is also underpinned by reduced milk prices in the Southern region markets (see Livestock sector). The ToT between local quality goat and cereals indicated declining trends in all Sorghum Belt regions and Middle Shabelle but increased in Juba and Lower Shabelle regions. The ToT are below previous year (November 2012) levels in most regions (apart from Juba regions with higher ToT) mostly on account of higher cereals prices (Figure 9). The highest ToT in November 2013 was recorded in the Bay region (320 Kg/head) and the lowest was in the Hiran region (96 Kg/head).

SOMALIA LIVELIHOODS ZONE MAP



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FSNAU Market Data Update, November 2013
Food Security and Nutrition Quarterly Brief, November 2013

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