FSNAU
Food Security and Nutrition Analysis Unit - Somalia

Food Security & Nutrition

Issued December 18, 2014

Quarterly Brief - Focus on Post-*Deyr* 2014/15 Season Early Warning

KEY ISSUES

Based on the Food Security and Nutrition Analysis Unit's (FSNAU) preliminary outlook, acute food insecurity is expected to persist in most parts of Somalia although slight improvements are expected, predominantly in pastoral and agropastoral areas of the country. Based on the Integrated Phase Classification (IPC) acute food insecurity severity scale, a modest decline in the overall number of people in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) is expected in the first half of 2015. Most of the population in urban and rural livelihoods of the country is likely to be classified as **Stressed** (IPC Phase 2). However, some population groups in urban areas in the South affected by trade disruptions due to conflict as well as those in rural areas affected by floods or poor rains will be classified in **Crisis** (IPC Phase 3) or **Emergency** (IPC Phase 4). Internally Displaced Persons (IDP) are expected to remain the largest population group in acute food security crisis.

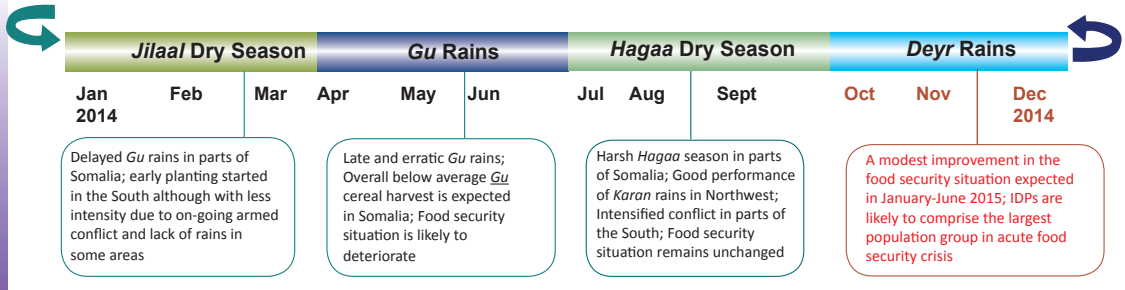
As a result of largely normal *Deyr* rains, near average to average crop production is expected in the main cereal producing regions of Lower Shabelle and Bay, which normally account for over two-thirds of the *Deyr* cereal production in southern Somalia. However, domestic cereal supply (from *Gu/Karan* and *Deyr* harvests) is expected to be below average as a result of below average *Gu-Karan* harvest in the Northwest (two-thirds of the normal levels) as well as anticipated shortfall in *Deyr* harvest in the regions of Juba, Middle Shabelle and Hiran. Normally, these regions jointly comprise about one-quarter of the *Deyr* cereal harvest in southern Somalia.

A short-term deterioration of food security conditions (through March/April 2015) is expected in riverine areas of Juba and Middle Shabelle due to floods, although this is likely to be mitigated by a modest improvement from off-season cereal and sesame production expected by March-April next year. Below normal rains in Hiran Agropastoral are likely to affect crop production in this livelihood but will not a have short-term impact on pasture resources, while livestock migration options towards pastoral and riverine areas are also available. Pasture and water shortages could be expected towards the end of *Jilaal* season (in March 2015) in pastoral parts of southern Gedo, Middle and Lower Juba and parts of Central due to below normal *Deyr* rainfall performance.

IDPs in major settlements of Somalia are expected to remain in food security crisis. The recent nutrition survey (December 2014) results revealed a sustained prevalence of Serious to Critical levels of acute malnutrition (Global Acute Malnutrition [GAM] >10%) in 10 out of 13 main IDP settlements. Critical levels (GAM >15%) of acute malnutrition are prevalent in five of the settlements, including Baidoa, Dolow, Bossaso, Garowe and Galkayo. While the total number of acutely malnourished children decreased seasonally by more than 18 percent compared to *Gu* 2014 season, it is significantly higher (by 31%) compared to *Deyr* 2013. IDPs comprise the moist vulnerable group of population in Somalia. Based on the United Nations High Commissioner for Refugees (UNHCR) data, over 20 000 IDPs have been evicted over the past three months, primarily from governmental buildings. More evictions are likely in the coming months, which will have implications on food security status of this population group. Based on the UNHCR data, insecurity caused a displacement of about 30 000 people since September 2014.

Trade disruptions due to prevailing insecurity sustained in some urban areas of Bakool, Bay, Hiran and Gedo regions where access roads remain under insurgent control. The Consumer Price Index (CPI), showed a relative stability in the cost of living in most urban areas in July-November 2014 period. Expected declines in cereal prices when the *Deyr* harvest enters the market (January-February) is likely to exert a downward pressure on the cost of living through March 2015. However, this could be compromised by deteriorating security conditions, particularly in southern parts of the country. Cereal price trends in the subsequent period (April-June 2015) will be influenced by such factors as the *Gu* 2015 rainfall performance, which is yet uncertain, as well as the extent of humanitarian relief interventions.

Continued humanitarian interventions are necessary at least up to the end of June 2015 to address prevailing acute food insecurity conditions and malnutrition in Somalia.



Somalia Seasonal Timeline & Key Events

- Climate
- Civil Insecurity
- Livestock
- Agriculture
- Markets
- Nutrition
- Integrated Analysis

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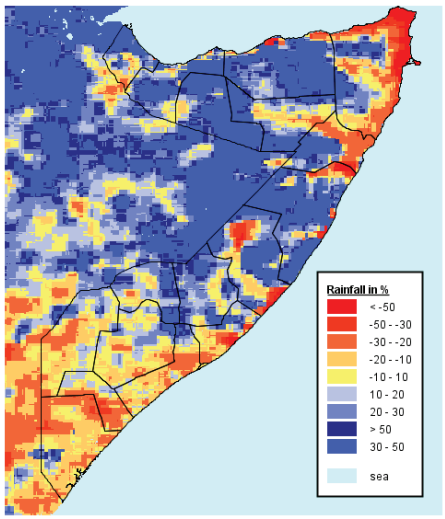
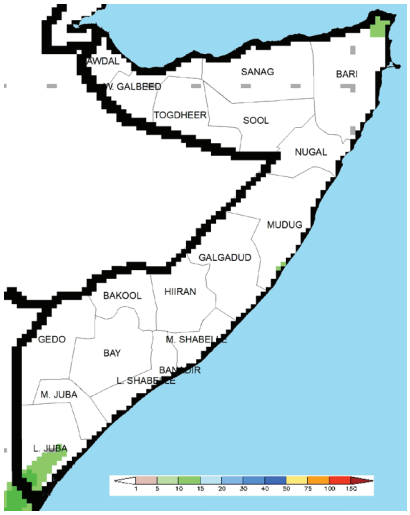
SECTOR HIGHLIGHTS

CLIMATE

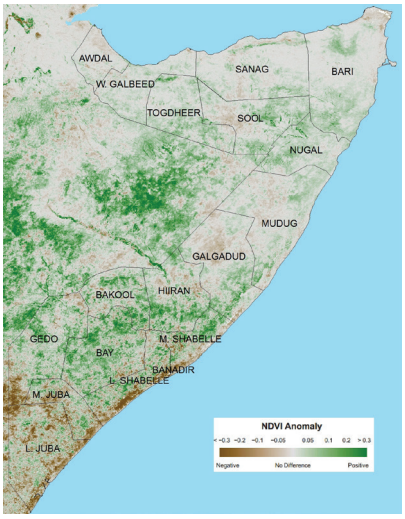
Map 1: Oct -Nov 2014 Seasonal rainfall anomaly (%) from LTM



Map 2: NOAA - Rainfall forecast valid up to 23rd of December, 2014



Map 3: E-MODIS - NDVI Anomaly December 1-10, 2014



The October to November *Deyr* 2014 rainfall performance was mixed in terms of the intensity, temporal and spatial distribution in many parts of Somalia. Overall, rainfall has been largely normal across the country, including the regions of Northeast, Central and Northwest and most parts of the South. However, *Deyr* rains were below normal in Gedo, Juba, Lower Shabelle and parts of Central and Hiran regions. In Guban Pastoral of Northwest, early moderate *Hays* rains precipitated in late November 2014 (Map 1).

In the northern and central regions, *Deyr* rains started in late September 2014. Rainfall performance was average in most parts although with varying temporal and spatial distribution across different livelihoods with a long dry spell between mid-October up to the first dekad of November. In the North, below normal rainfall was recorded in Gebi valley of Sanaag, parts of Karkar/Dharoor Valley and East-Golis livelihood zones of Bari, and in localized areas of Sool Plateau and Coastal *Deeh* livelihood zones in the Northeast. In most areas of Central regions, rains were near normal, except in some parts of the Addun Pastoral and in pockets of Hawd Pastoral, where the rainfall performance was below normal. While the Coastal *Deeh* livelihood of Central remained dry throughout October and the first dekad of November, the livelihood received moderate rains during the second and third dekads of November.

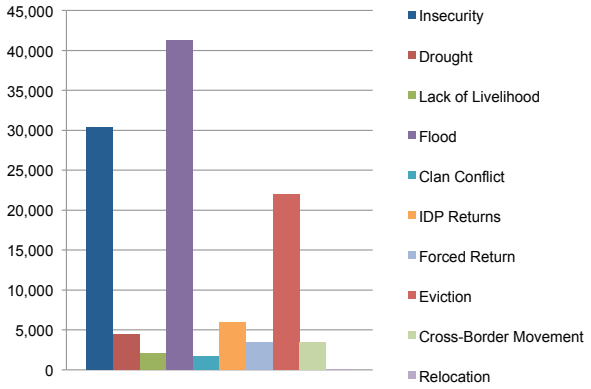
In most of the southern regions, the 2014 *Deyr* rains started timely but were poor in terms of amount, distribution and frequency during October 2014 apart from pastoral livelihoods (Hawd and SIP) of Hiran region where rains were average to good. However, rainfall intensified in the second dekad of November 2013 across southern regions. Overall, rains in October–November were 10-50 percent below the Long-Term Mean (LTM) in the regions of Middle Juba, Lower Juba, Lower Shabelle and parts of Gedo. However, above normal rains (10- 50% above the LTM) were received in most parts of Bay, Bakool and Hiran, some parts of Middle Shabelle, Middle Juba and Gedo regions, as well as in localized areas of Lower Juba region. The near normal to above normal rains in the upper river catchments of Ethiopia (Kiremt rainy season in June-September 2014) led to river floods (from late October to November 2014) in Jowhar and Balad districts of Middle Shabelle and in the riverine livelihood zone of Juba regions (Sakow, Buale, Jilib and Jamame districts).

Based on the field information, in the first dekad of December light showers precipitated in small pockets of Middle Shabelle as well in small pockets of northern regions. The rest of the country remained dry during this period, which is indicating ending of the short-rainy season. The rainfall forecast up to December 23 by The National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Center (CPC), indicates cessation of *Deyr* rains across the country (Map 2).

According to E-MODIS satellite-derived Normalized Difference Vegetation Index (NDVI) anomaly (LTM 2001-2010) for the first dekad of December 2014, vegetation was average to above average in most parts of the country. However, significant decreases of vegetation vigour are evident in rainfall-deficit areas of Juba, south Gedo, coastal areas of Shabelle and parts of Galgadud region (Map 3).

CIVIL INSECURITY

Figure 1: Population Displacements Countrywide (September-November 2014), UNHCR



Between July and November 2014, the security situation of South-Central regions of Somalia remained volatile, particularly in Galgadud, Banadir, Hiran, Lower Juba, Lower Shabelle, Middle Juba, Gedo, Bay and Bakool. Incidents of violence in these regions included assassinations, suicide bomb attacks, explosions, landmines and airstrikes targeting insurgents. Armed confrontations have continued between insurgents and Somali National Army and allied African Union Mission for Somalia (AMISOM) troops. According to UNHCR population movement data, an estimated 114 000 Somalis fled their homes and were displaced within Somalia during September- November 2014 period (http://data.unhcr.org/horn-of-africa/country.php?id=197). The main causes of these displacements included floods (36%), insecurity (26%) and forced evictions (19%) [Figure 1]. Displacements due to insecurity occurred in Middle Juba, Gedo and Galgadud regions. Forced evictions of over 6 000 of IDPs from public and private properties and buildings are also expected to continue, primarily in Mogadishu and other urban areas of Somalia. Based on the latest figures provided by the UNHCR, the total number of IDPs throughout the country is estimated at 1.1 million.

Continued trade disruptions in southern regions of Bakool (Tieglow, Wajid, Elbarde and Rabdhure), Bay (Qhasadheere), Gedo (Garbaharey and Burdhubo) and Hiran (Bulo-burte) regions due to blockages of main supply routes by armed groups and restricted humanitarian access continue to affect food security situation in these areas. The disruption of trade activities and inability of people to move freely in these regions also limits people's access to livelihood activities and results in reduced access to food and non-food items in the affected towns. The findings of the FSNAU Preliminary *Deyr* 2014 Assessment (November 2014) indicate that restricted trade in conflict-affected areas of Gedo has prompted relocation of significant numbers of households to other areas with better access to markets. According to the report by the Office for the Coordination of Humanitarian Affairs (OCHA) airlifts remain the only way to get supplies to displaced people in need (http://reliefweb.int/sites/reliefweb.int/files/resources/OCHA%20Somalia%20Humanitarian%20Bulletin%20October%202014.pdf). Insecurity is likely to persist in parts of the South-Central regions in the next six months as military confrontations between insurgents and the Somali National Army backed by AMISOM are expected to continue and further displacements can be expected in the southern parts of the country. Based on information from Somalia Food Security Cluster, various types of humanitarian assistance (cash, food and vouchers) programmes geared towards improving immediate access to food and safety nets are planned in January-June 2015. However, the planned interventions are subject to availability of funding as well as humanitarian access, particularly in South-Central parts of the country.

AGRICULTURE

Based on the FSNAU *Deyr* preliminary assessment results (November 2014), early prospects for *Deyr* 2014/15 cereal production in southern Somalia are favorable due to largely normal *Deyr* rainfall performance. The area planted under cereals (sorghum and maize) varied from below average to average in most of the southern regions. Most of the planted maize and sorghum is expected to be harvested in the period between December 2014 and February 2015.

Cereal crops have been performing well in the major cereal producing southern regions of Lower Shabelle and Bay. In Lower Shabelle, cereal crop conditions are generally good as a result of average rains, especially in agropastoral and riverine areas of Wanlaweyne, Afgoye, Qoryoley, Marka and Kurtunwarrey. The exceptions are localized areas of the coastal side of Barawe district, where maize production is likely to be compromised by light and delayed *Deyr* rains. Overall, *Deyr* cereal harvest in Lower Shabelle region is expected to be average. In Bay region, which is a major sorghum producer, the outlook for the *Deyr* 2014/15 crop production is promising in all districts. Although above average rains have hampered farming activities in some areas, the improved soil moisture has encouraged early planting and expansion of cultivated areas. Preliminary crop assessment indicates that *Deyr* 2014/15 cereal production is likely to be higher in the region compared to *Deyr* 2013/14. Comparable situation was also reported in Gedo, Middle Juba and Bakool regions.

By contrast, cereal crop production is expected to be below average in riverine areas of Lower Juba, Hiran and Middle Shabelle due to significant damage to standing crops caused by floods (October). For example, the recent floods (2nd dekad October) in Beletwein riverine areas have destroyed standing crops (200 – 300 ha) and agricultural infrastructure (*canals and culverts*). Floods in Jowhar (Middle Shabelle) have affected crops (2 600 ha of maize and

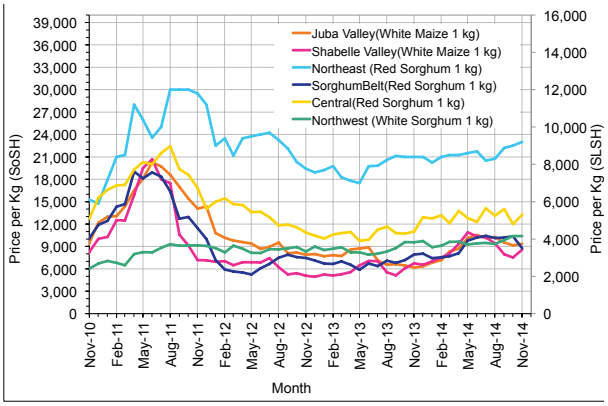
sesame), while in Jamame (Lower Juba) floods inundated 1 500ha of *desheks*. Although the floods will diminish the *Deyr* harvest in the above-mentioned regions, off-season crop production as a result of recession cultivation in *desheks* and flooded agriculture lands will improve cereal availability by March-April 2015.

Shabelle River breakage, Mahaday District. FSNAU, November 2014.

In the Northwest Agropastoral, the *Gu-Karan* 2014 cereal (yellow maize and white sorghum) harvest is estimated at 45 000 tonnes based on recent joint FSNAU/ Ministry of Agriculture of Somaliland crop assessments (November 2014) carried out in Hargeisa, Gebiley, Baki and Borama districts using the Pictorial Evaluation Tool (PET). *Gu-Karan* 2014 production is 30 percent below the average cereal production estimates for 2010-2013. However, the current Gu-Karan production estimates are higher compared to the July 2014 projections by FSNAU, which is attributable to replanting of maize due to good Karan rainfall performance that also facilitated crop establishment and improved the yield per hectare. The bulk of this production comes from the W. Galbeed region (34 500 tonnes), followed by Awdal (10 300 tonnes) and Togdheer (190 tonnes) regions. Average cowpea production is expected in the Cowpea Belt of the Central regions due to favourable rainfall.

The favourable outlook for *Deyr* and off-season cereal harvest suggests improved cereal availability prospects for most regions. In the major cereal producing regions of Shabelle and Bay the cereal stocks are expected to extend at least up to the next harvest (July - August 2015). Therefore, cereal prices are likely to decline in most regions of southern Somalia once the harvested cereals start entering the markets in January-February 2015. However, as harvest is going to be collected intermittently the decline in prices will also be moderate and gradual. Cereal price trend in the first half of 2015 is likely to follow the normal seasonal pattern although this will also be moderated by the flow of relief food as well as security situation in Somalia.

Figure 2: Monthly Trends in Local Cereal Prices



The reference markets in the main cereal producing districts of Baidoa (Bay), Bardhere (Gedo), Qoryoley (Lower Shabelle) and Jilib (Middle Juba) showed a normal cereal price trend in November 2014. Between July and November 2014, maize prices declined in the riverine markets of Shabelle (20%) and Juba (15%). In November 2014, the lowest maize prices (6 200-7 000 SoSh/ kg) were recorded in the main producing districts of Lower Shabelle (Qoryoley, Jamame and Jilib), while the highest prices were noted in Dobley (13 000 SoSh/ kg). On the other hand, red sorghum prices decreased in sorghum-producing regions of Bay (15%), Gedo (5%) and Bakool (23%) in the same period, while white sorghum prices rose in Hiran (11%) and the Northwest (10%). In November 2014, both maize as well as sorghum (white/ red) prices show increases from the levels a year earlier across the country. This is attributable to a combination of factors such as consecutive seasons of below average crop production, trade disruptions due to intensified conflict in southern regions in the current year as well as reduced humanitarian assistance (Figure 2).

LIVESTOCK

Relatively favourable *Deyr* rainfall performance alleviated the severe water shortage observed during *Hagaa* dry season (July-September 2014) and translated into enhanced rangeland conditions in most pastoral and agropastoral livelihoods of the country, which subsequently improved livestock production, reproduction and sales.

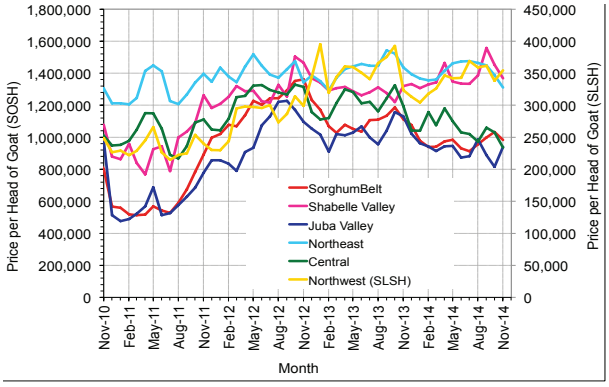
Pasture, browse and water conditions are average to above average in most of the Northern regions due to average to above average *Deyr* rains and good *Karan* rains (in Northwest). Exceptions are pockets of Gebi/East Golis (Sanaag region), parts of Coastal *Deeh*, KarKar/Dharor and East Golis livelihoods (Bari region), where pasture/browse and water are below average due to below average *Deyr* rains. Similarly, pasture/browse and water improved in southern and central regions, ranging from average to above average. Exceptions are parts of Addun/Hawd (Adado and Dhusamareb districts), agropastoral areas of Hiran and Middle Shabelle (Jowhar/Balcad), Southeast Pastoral livelihood, Lower Juba Agropastoral (Jilib district) and pockets of the Coastal *Deeh* of Lower Shabelle and Juba, where pasture and water are below average to poor.

In these areas, increased water trucking is expected towards the end of the dry *Jilaal* (January-March) season.

Currently livestock migration is normal across the country moving from rain deficit areas to better rained areas. Livestock body conditions for all species remain near normal to above normal (score 3-4 on a 5-point Pictorial Evaluation Tool [PET] scale for livestock) in most of the country as a result of enhanced rangeland conditions. However, field reports indicate slightly below average to average body condition (PET 2-3) with improving trend in parts of Central and Gedo due to the impact of harsh *Hagaa* dry season. Medium cattle calving (August-September), goat/sheep kidding/lambing (October-November) and low to medium camel calving as from November 2014 are reported across the country. This resulted in normal milk production in most parts of the country, with the exception of rain deficit areas where it is below normal.

Water catchment. Agropastoral Low Potential. Wajid District, Bakool Region. FSNAU, November 2014.

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



Livestock prices were mostly stable or increased across the country during the July – November, 2014 period due to a high demand for all livestock species during the *Hajj* festival. However, local quality goat exhibited mixed, mostly downward trend in North and central, but prices increased in most of the southern markets between July-November 2014. The yearly comparison of livestock prices in most markets indicate stable to increasing trends for all species (Figure 3). Based on official port statistics, for July-September 2014, Berbera and Bossaso ports exported 2 592 570 heads of livestock (sheep, goat, camel and cattle), of which 72 percent were transported through Berbera port. These export figures are 37 percent higher than the exports in the same period last year (1 886 351 heads).

MARKETS AND TRADE

Exchange Rate Trends

From July to November, the Somali shilling (SoSh) depreciated against the United States dollar (USD) in most of the southern markets. This is attributed to recent political stalemate in Mogadishu, which affected the foreign exchange markets. At the end of November, open air retail markets in Banadir region, for example, quoted 21 625 SoSh per 1USD, a slight depreciation from the July level of 20 000 SoSh/ USD. The Shilling was, however, stable in the Central and Northeast regions during this period. The SoSh remained stable against the USD when compared to November last year (2013). The Somaliland shilling (SlSh) to USD exchange rate, was relatively stable across most markets of the SlSh-using area over the two reference periods.

Commodity Price Trends

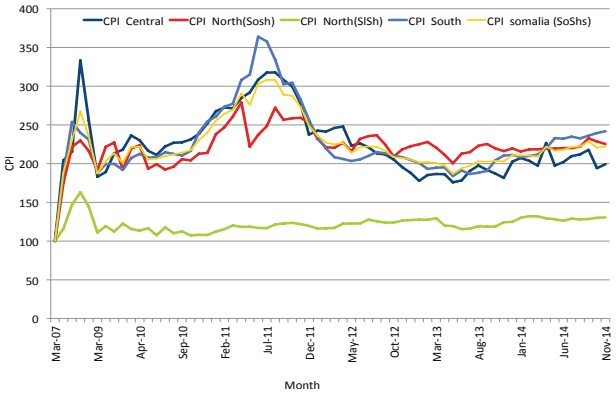
The prices of most essential imported commodities such as rice, sugar, wheat flour, diesel and vegetable oil increased moderately (10-25%) from July to November in the southern markets, mainly due to heavy *Deyr* rains that destroyed transport infrastructure, leading to high transport cost as well as a slight loss of the shilling against the dollar. In addition, in parts of Bay region (Qansadhere) and Bakool (Hudur and El Barde) high levy imposed by the insurgents and trade blockade have significantly magnified price increments. In particular, prices of basic commodities in Qansadhere town have risen by over 20 percent since June 2014 when the AMISOM military operation began there. In the central and northern regions, prices of imported goods have either remained stable or decreased modestly- generally following international market trends. Annual price changes recorded in November 2014 indicate stable prices of imported commodities in most parts of the country with the exception of conflict affected areas mentioned above.

The estimated informal cross-border import (2 666 MT) of maize and sorghum along border points monitored by FAO, FEWS NET and WFP along the Somalia, Kenya and Ethiopia border show a significant (82%) increase during July –November 2014 when compared to the same period in 2013. This is attributed to current lean season in the country preceded by a below average *Gu* 2014 production. In addition, some (51 456 MT) of imported cereals mainly wheat flour and rice were re-exported to Ethiopia and Kenya, which was 38 percent higher than same period last year on account of increasing demand from more profitable prices in these countries.

Consumer Price Index (CPI)

The CPI for urban areas, measured through the changes in the cost of the Minimum Expenditure Basket (MEB), indicates stability in the cost of living in urban areas of southern Somalia in July-November period. The price of commodities, especially cereals, were moderated by food aid distribution in parts of the southern regions. The CPI is also stable in the Central and Northern parts of the country. The CPI is however significantly higher (5-15%) compared to a year ago in both currency zones due to increase in cereal prices as a result of below average cereal production in the recent *Gu* 214 season and reduced humanitarian food assistance (Figure 4).

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

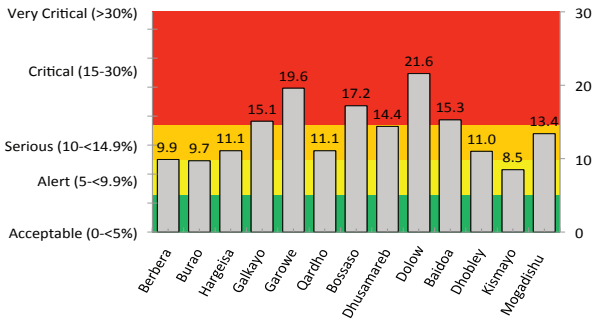


NUTRITION

The October-November 2014 nutrition surveys shows sustained prevalence of Serious to Critical levels of acute malnutrition (Global Acute Malnutrition [GAM] >10%) in 10 out of 13 main IDP settlements and increase in malnutrition among Dolow, Baidoa, Bossaso and Hargeisa IDPs. These surveys indicated improved nutrition situation among IDPs in Mogadishu, Kismayo, Dhobley and Dhusamareb IDP in South-Central regions and Burao and Berbera IDPs in Northwest.

Critical levels of acute malnutrition (GAM 15-30%) were recorded in five IDP settlements: Baidoa, Dolow in South and Bossaso, Garowe and Galkayo in Northeast region. ***Serious*** levels of acute malnutrition (GAM 10-14.9%) were recorded among IDPs in Mogadishu, Dhobley and Dhusamareb in South-Central region, Qardho in Northeast and Hargeisa in Northwest (Figure 5).

Figure 5: Prevalence of Global Acute Malnutrition (GAM) in the main IDP settlements across Somalia (November 2014)



Increase in Crude Death Rates (CDR) and Under-Five Death Rates (U5DR) was observed among Dhobley IDPs even though nutrition situation (both GAM & SAM) shows improvement. As there has been no significant change in prevalence of morbidity in children in the last 6 months, underlying cause for changes in mortality is unclear. Improvement in both CDR and U5DR was seen in Mogadishu IDP along with improvement in nutrition situation, which is attributed to scaling up of humanitarian intervention. Kismayo IDPs also showed improvement in nutrition situation and CDR but ***Serious*** levels of U5DR still persist. This is not surprising as a 21 percent increase in morbidity since the last 6 months has been recorded among Kismayo IDPs because of measles outbreak and lack of a functional immunization services.

The total number of children with acute malnutrition (GAM) among the displaced population at the time of the November 2014 survey is 14 700, which includes 2 600 children with severe acute malnutrition (SAM prevalence). This represents a seasonal decrease of over 18 percent compared to *Gu* 2014 but it is still 31 percent higher compared to *Deyr* 2013. SAM caseloads show a drastic decrease (43%) in number of severely malnourished children since *Gu* 2014 but it is 18 percent higher compared to *Deyr* 2013. The number of malnourished (GAM and SAM) children is projected to rise to 26 640 and 4 680, respectively, over the next six months (incidence).

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

For the post-*Gu* 2014 period (August-December 2014), FSNAU and partners estimated 732 000 of urban people in **Stressed** (IPC Phase 2), 88 000 in **Crisis** (IPC Phase 3) and 26 000 in **Emergency** (IPC Phase 4) acute food insecurity phases across the country. **Crisis** (IPC Phase 3) prevailed in urban areas of Lower Shabelle (Qoryoley district) and Middle Juba, while Hiran (Bulo-Burte district) and Bakool (Wajid & Hudur districts) regions were identified in **Emergency** (IPC Phase 4). Cost of living (i.e. cost of the MEB) and purchasing power (measured through terms of trade [ToT] between labour wage and cereals) were among the major determining factors of the food security situation of urban and IDP populations due to their high market-dependency. Insecurity and a lack of humanitarian access have also contributed to food security conditions in the post-*Gu* 2014, particularly in the regions of Bakool, Hiran, Lower Shabelle and Middle Juba.

The MEB cost in local currency terms indicated a relative stability between July and November 2014 in the regions of Northwest, Galgadud, Mogadishu, Bakool and Bay. Conversely, it has declined in Gedo (4%), Mudug (11%) and Hiran (9%) regions, while increasing in Shabelle (13-23%), Juba and Northeast (5-6%) regions. The increase was mostly driven by price trends for such commodities of the MEB as sorghum, wheat flour and sugar. Compared to a year ago (November 2013), the MEB cost is higher in most parts of the country, particularly in southern regions of Bakool (40%), Middle Shabelle (34%), Lower Shabelle (31%), Banadir (29%) and Bay (18%), due to increase in prices of sorghum, wheat flour and sugar, which comprise half of the basket cost. In November 2014, the highest MEB cost in dollar terms was recorded in Sanag (USD 222), while the lowest was in Bay (USD 88), which is somewhat consistent with the five-average (2009-2013) pattern.

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

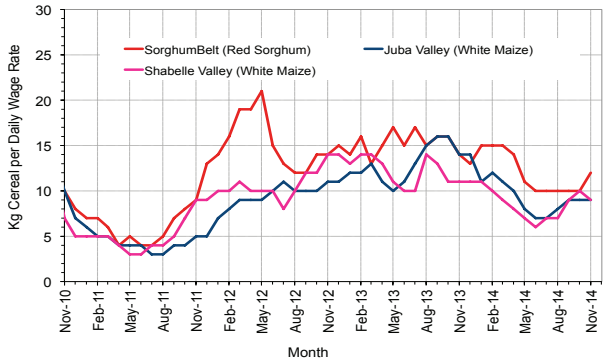
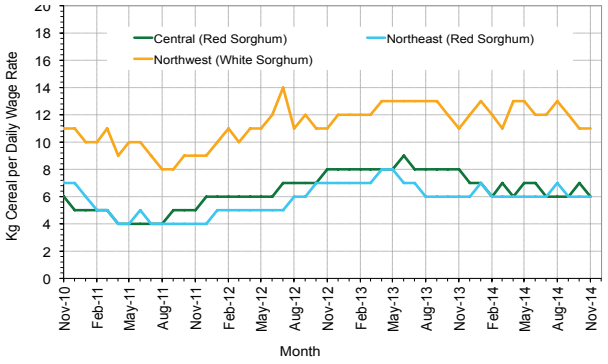


Figure 7: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (North & Central)



Casual labour, which is characterised by very low and irregular wages, constitutes a critical source of income for poor households in urban areas. In the period of July-November 2014, the wage rates for casual labour exhibited mixed trends across the country. Wage increase was noted in Hiran (18%), Lower Juba (11%) and Banadir (5%), which could be attributed to increased seasonal agricultural labour opportunities. In most other regions, the rates remained steady during the same period. Compared to a year ago (November 2013), labour wages showed stable trends in Northwest, Northeast and Central (Mudug), but declined in most southern regions as well as in Galgadud (Central). The most significant drop (43%) in the casual labour wage rate was recorded in Bakool due to a trade embargo imposed by insurgents in the beginning of the current year, which jeopardized labour opportunities for poor urban households.

The purchasing power (ToT between casual labour wage and most commonly consumed cereals) increased by 1-5 kgs of cereals per daily wage or remained stable over the past five months across the southern regions. This trend was mostly driven by cereal price declines and sustained or increased casual labour wage rates. The ToT remained stable in most of Northwest, Northeast and Central. Compared to a year ago (November 2013), the ToT is lower (by 4-8kg/ daily wage) in most regions of the South. The largest annual decrease (9 kg/daily wage) is noted in Middle Juba, mainly due to a significant (76%) increase in cereal prices. In most other regions of the country, the ToT increased by 1-2 kgs of cereals/ daily labour wage, which is attributable to a combination of labour wage increases and cereal price declines. In November 2014, the highest ToT (15 kg/daily wage) was recorded in Hiran and the lowest (3kg/ daily wage) was in Bakool (Figures 6 and 7).

RURAL

Northern regions

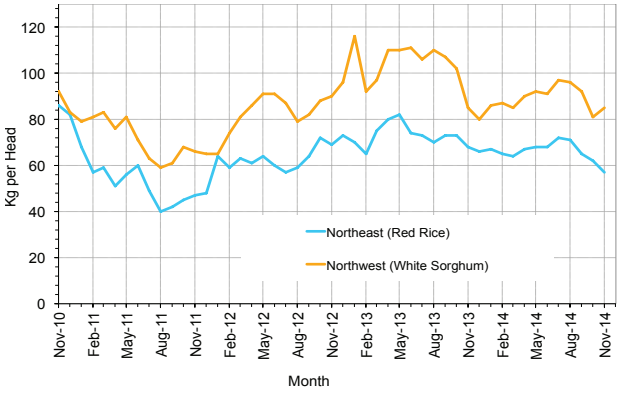
For the post-*Gu* 2014 (August-December 2014), the food security situation in most rural livelihoods of the North was classified as ***Stressed*** (IPC Phase 2) with the exception of the Coastal *Deeh* in Northeast (Nugal and North Mudug) that were categorised in **Crisis** (IPC Phase 3). In total, 373 000 in the northern regions were identified in **Stressed** (IPC Phase 2), 47 000 in **Crisis** (IPC Phase 3) and 7 000 destitute pastoralists in **Emergency** (IPC Phase 4).

Good body condition of Camel. Sool Plateau, Badhan, Sanag Region. FSNAU, November 2014.

As a result of prolonged *Karan* (July-September) and average to above average *Deyr* rains (September-November), pasture/browse and water conditions are average to good in most of the northern regions.

Exceptions are parts of Coastal *Deeh*, Karkaar/Dharor and East Golis livelihoods of Qandala and Iskushuban districts (Bari region) where pasture and water are below average due to below average *Deyr* rains. Most of these rain-deficit livelihoods of the Bari region have also experienced the severe water shortages during the *Hagaa* dry season. Currently, normal livestock migration within the seasonal wet grazing areas is reported across the northern regions, while body conditions of all livestock species are average to above average (PET score of 3-4) in most pastoral livelihoods. Medium to low calving for camel and cattle and medium kidding of goats are reported in most regions. Goats have started kidding in October, while camel in November, 2014. Consequently, milk availability has improved to average/ above average levels in most areas. However, below average/ poor milk production is reported in the above-mentioned rain-deficit areas of Northeast.

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



According to the recent FSNAU/ Ministry of Agriculture *Gu-Karan* crop assessment (November 2014) carried out in the Northwest Agropastoral (Hargeisa, Gebiley, Baki, Borama districts) using PET approach, about 45 000 tonnes of cereals (yellow maize and white sorghum) were collected in this livelihood. These estimates are higher compared to the FSNAU projections made in July, which is attributable to good performance of *Karan* rains that resulted in increased planted area and cereal yield. Nevertheless, the 2014 *Gu-Karan* production is still lower (by 30%) compared to the average of the last four years (2010- 2013).

The ToT between goat and rice exhibited mixed trends over the last five months (July-November 2014). In the Northeast, the ToT declined from 89kg to 86 kg/head as a result of local quality goat price decrease (8%). In the Northwest, the ToT rose from 70 to 74 kg/head in Awdal region, while it dropped from 73 to 62 kg/head in Wooqoi Galbeed following seasonal pattern. Yearly comparisons indicate relative stability in the Northeast and increase (5%) in the Northwest. In November, the highest ToT (117kg/ head) was recorded in Bossaso (Northeast) market and the lowest (52 kg/ head) was in Togwajale market (Northwest); this is consistent with the five-year average (2009-2013) pattern (Figure 8).

Central regions

For the post *Gu* season (August-December, 2014), most rural livelihoods of Central regions (Hawd, Addun, Cowpea Belt) were classified as **Stressed** (IPC Phase 2) with the exception of the Coastal *Deeh* livelihood, which was classified in **Crisis** (IPC Phase 3). The estimates of rural people in **Stressed** (IPC Phase 2), **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) are equivalent to 106 000, 37 000 and 10 000, respectively. This was a slight deterioration from the beginning of the year due to generally below average / poor *Gu* 2014 rains, which affected own production (milk and cowpea crops) of pastoralists and agropastoralists of central regions.

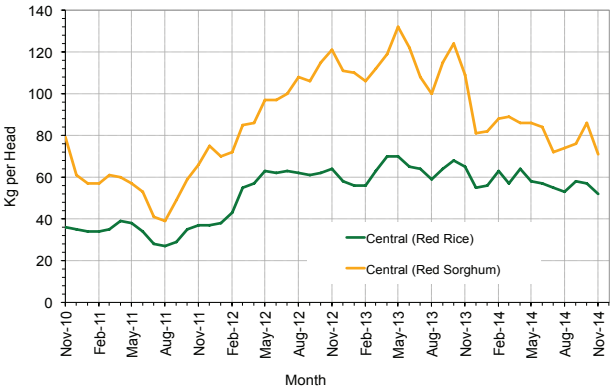
Average body condition of Goat. Coastal Deeh, Ceel-bur, Galgadud region. FSNAU, November 2014.

Near average to average *Deyr* rains in October-November, 2014 have improved water and pasture in rural livelihoods of central regions (Cowpea Belt, Coastal *Deeh* and parts of Hawd and Addun). However, below average to poor rains precipitated in parts of Addun and Hawd, which resulted in significant livestock outmigration from these livelihoods (mainly Dhusamareb and Adado districts) to other adjacent livelihoods. The livestock migration pattern is normal in other areas. Livestock body condition is largely normal in most livelihoods (PET score 3) with the exception of the above-mentioned rain-deficit areas where it is below average (PET score 2) although the trend has been improving following outmigration. Conception rates of camel and sheep/goat was medium to low during the *Deyr* 2014 season. Medium kidding/ lambing of goats and sheep and increased milk yield of lactating camel during the *Deyr* rainy season, have contributed to improved milk availability in Hawd and Addun livelihoods, which resulted in a moderate decline in milk prices (17%) between July and November, 2014.

In the Cowpea Belt livelihood, the cowpea crop generally performed well and production is expected to be average in most areas. The exceptions are a few locations in Hobyo, Haradhere and El-Bur districts, where cowpea harvest is likely to be below average as a result of a prolonged dry spell in October. In a normal season, cowpea stocks of poor households last for up to 3-4 months. Sorghum has also performed well during the *Deyr* growing season, although

this crop is marginal for the Cowpea Belt livelihood. The ToT between local quality goat and cereals (rice) declined over the last five months (July-November, 2014) in most markets of the central regions. The decline was mostly driven by local quality goat price decreases due to reduced trade activities related to prevailing insecurity. In November 2014, the highest ToT (69 kgs of rice/head) was recorded in Galkayo market and the lowest (39-40 Kgs of rice/head) was in Eldher and Dhusamareb districts. The low rates in the mentioned districts are due to prevailing insecurity and poor road access (mostly sand dunes). On an annual basis, the ToT fell by 20 percent, on average, in central regions. The biggest annual drop in the ToT (28%) was recorded in Galkayo market, which was driven by declined goat price and stable rice prices (Figure 9).

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



Southern regions

For the post-*Gu* 2014 (August-December 2014), the food security situation in most rural livelihoods of southern regions was classified as **Stressed** (IPC Phase 2), with the exception of Southern Agropastoral of Middle Juba in **Crisis** (IPC Phase 3) and Southern Inland Pastoral of Lower Juba in **Minimal** (IPC Phase 1). In total, 949 000 people were identified in **Stressed** (IPC Phase 2), 160 000 were in **Crisis** (IPC Phase 3) and 15 000 in **Emergency** (IPC Phase 4) acute food insecurity phases.

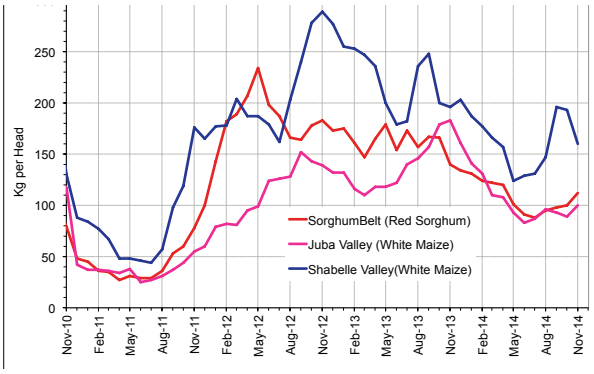
For the year ending 2014, cereal stocks of poor households have been exhausted in most riverine/ agropastoral areas of southern regions. The exceptions are the major cereal producing regions of Lower Shabelle and Bay where minimal cereal stocks are still available among the poor farmers in December. Relatively good seasonal performance of Deyr rains and humanitarian interventions in support of farming activities (seeds, tractor hours, canal and catchment rehabilitations) have created job opportunities for poor households for seasonal farming activities. The current outlook suggests an average *Deyr* 2014/15 crop production in most regions, with the exception of the rain-deficit areas of Lower Shabelle Agropastoral (maize rain-fed) and the flood-affected areas of Juba, Hiran and Middle Shabelle regions. The harvest losses are expected to impact food access of poor farmers in the coming months. However, a limited off-season harvest expected by March-April in the flooded-affected areas of Beletweyne (Hiran), Jowhar (Middle Shabelle), Jamame (Lower Juba) and the riverine of Gedo (see Agriculture Sector), will help to mitigate food shortages among poor farmers. Based on the current outlook of the Deyr harvest, cereal prices are likely to follow a seasonal pattern. The cereal price decline is expected from December when wealthier farmers start releasing the Gu carry-over stocks to the market.

The *Deyr* 2014/15 rains have improved pasture conditions, replenished water catchments and contributed to improved livestock body conditions in most areas. Milk availability is near average as a result of average cattle calving that started in August. The milk yield of lactating camel has also improved as a result of improved pasture, while more camel calving is expected from November onwards, which will further improve milk availability and access. During this *Deyr* season, the conception rates among sheep, goats and cattle were high in most parts of the region, but they were low to medium for camel. The kidding/lambing among small ruminants is expected by late February / early March 2015, while cattle-calving is expected by June 2015. Hence, livestock herds, particularly of small ruminants, will continue recovering in the coming months although they are likely to remain near baseline levels in most pastoral livelihoods. The exceptions are camel herders in Juba and Gedo regions, where herds of camel are above baseline levels.

Average maize crop. Buulo Fuur, Qansahdere, Bay Region. FSNAU, November 2014.

Between July and November 2014, the ToT between daily labour wage and cereals increased by an average of 20 percent in the Sorghum Belt, due to cereal price declines and increased wage rates during the *Deyr* growing season. The highest ToT was recorded in Gedo (15kg/wage) and Bay (14kg/wage) regions, while the lowest ToT was in Bakool (3kg/wage) as in July 2014. Annual comparisons indicate lower ToT levels in November 2014 across the Sorghum Belt regions, with the biggest plunge in Bakool (57%) due to restricted economic/ trade activities on the ground of worsened security conditions from the beginning of the year. In Shabelle and Juba regions, the ToT ranged between six and ten kg of maize/ daily wage rate, indicating an average of 29 percent increase since July 2014. However, the ToT fell on an annual basis across the Shabelle and Juba regional markets, with the highest annual decline recorded in Middle Juba (53%).

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



The ToT between local quality goat and local cereals (sorghum/ maize) increased across the southern regions during the July-November 2014 period, mostly reflecting increases in local quality goat prices and declines in local cereal costs (Figure 10).

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FSNAU Climate Update, November 2014
FSNAU Food Security and Nutrition Brief, October 2014
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