

Food Security & Nutrition

Issued November 13, 2012

Quarterly Brief - Focus on *Deyr* Season Early Warning

KEY ISSUES

The food security situation in all livelihoods of Somalia remains as classified during the post *Gu* 2012 analysis (Aug '12) with an estimated 2.12 million people in crisis until the end of the year. The major assumptions made in the food security situation projections in August-December 2012 have materialised. Specifically, lower than normal *Gu* off-season was harvested in riverine areas of southern Somalia due to poor performance of *Hagaa* rains. Normal to above normal *Deyr* rains in September-October 2012 facilitated timely start of the *Deyr* planting and improved pasture, water and livestock body conditions. Given the normal pace of *Deyr* planting, labour availability increased in farming communities in the South, benefitting poor farmers who rely on casual labour as a source of income during the lean season. Most pastoral and agropastoral households, who comprise 60 percent of Somalia's population, have improved access to milk as a result of calving (camel and cattle) and goat kidding during *Hagaa* and *Deyr* seasons.

Food prices showed some increases in the July-October 2012 period although they remained stable in most markets. In particular, sorghum prices rose moderately between August and October as stocks have diminished as a result of poor *Gu* harvest in most agropastoral livelihoods of South-Central. Conversely, maize prices have declined in maize-producing regions as maize crops from *Gu* and off-season harvests entered the markets. Prices of essential imported commodities such as diesel, vegetable oil, rice and wheat flour have remained either stable or decreased slightly in most markets of South-Central; imported cereal prices surged in October in the North. The cost of the minimum expenditure basket remained relatively stable in the July-October period reflecting recent trends in food prices (sorghum, wheat, sugar, oil), which make up 38-48 percent of the MEB. Livestock prices exhibited increases in October in response to high demand at the time of the *Haji* festivity (October) as reflected in increased livestock exports through Somali ports.

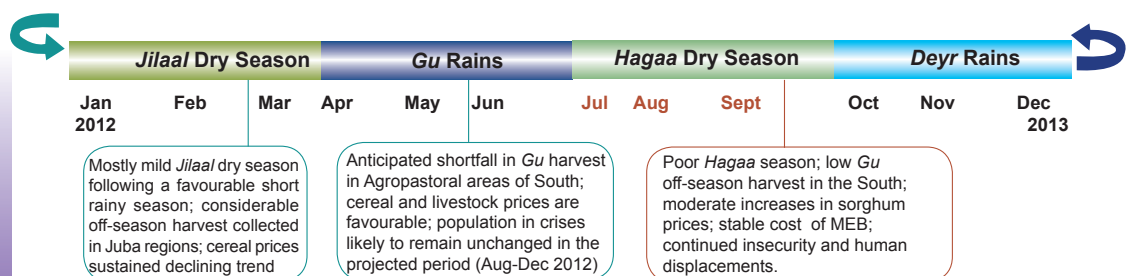
Overall positive food security trends in most parts of Somalia would ideally lead to improved nutrition situation in the country. The situation in West Golis livelihood zone in the North, which was in *Very Critical* phase in the *Gu* 2012 likely to have improved. Nevertheless, in the southern regions, outbreaks of acute watery diarrhoea and cholera could prevent improvement in the nutrition situation, which is likely to remain *Critical-Very Critical*. FSNAU is scheduled to undertake nutrition surveys across Somalia in November-December 2012 period to inform on the current nutrition situation.

The food security trends in the post-*Deyr* will very much depend on the performance of rains in the remainder of the current *Deyr* season (mid-November-December) and on humanitarian access. In the reporting period, insecurity continued to affect the food security situation in the South-Central, causing human displacements, losses of lives and livelihoods, disturbing trade flows and limiting humanitarian access. On average, 15,000 persons were internally displaced between July and September on a monthly basis with about sixty percent of the displacement on the account of insecurity.

Most forecasts are still predicting average to slightly-above-average rains for the *Deyr* season, but the likelihood of rain continuing into January has decreased. Adequate rainfall in the critical stage of crop development will determine the level of the *Deyr* harvest. FSNAU will conduct a preliminary *Deyr* impact assessment at the beginning of December to produce early warning for post-*Deyr* seasonal outcomes.

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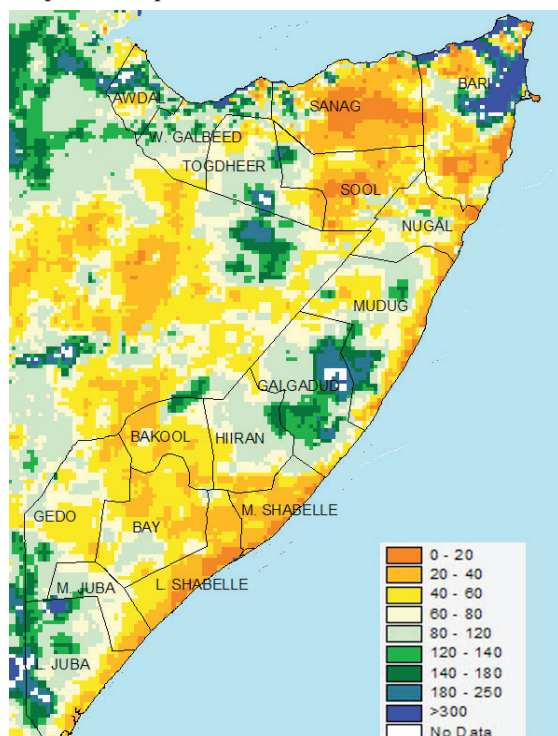


Somalia Seasonal Timeline & Key Events

SECTOR HIGHLIGHTS

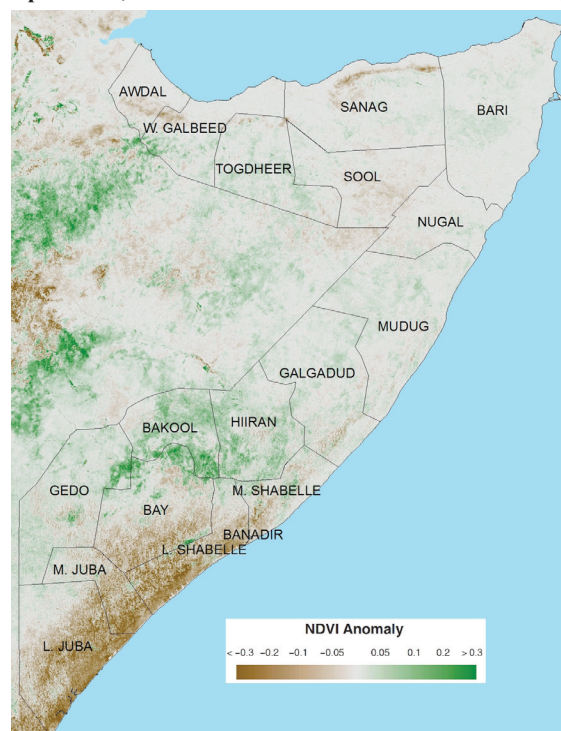
CLIMATE

Map 1: Jul-Sep-Oct 2012 Rainfall as a % of LTM



Source: FEWSNET

Map 2: 2012, October Dekad 2 E-MODIS NDVI anomaly



Source: FEWSNET

During the *Hagaa* (July-Sep) minor rainfall season, the coastal regions of Juba and Shabelle as well as areas of Bay adjacent to these regions receive light showers. However, the recent *Hagaa* season was poor in most of the southern regions (Jubas, Lower Shabelle and Bay) with rainfall estimates (RFE) being 0-20 percent of the Long-Term Mean. *Karan* (July-Sep) rains in the Northwest were generally favorable with light to moderate rains falling in Awdal, W. Galbeed and parts of Togdheer and Sanag regions throughout the season. The rest of the country usually remains dry during July-September period.

Deyr rains that precipitated across the country, which in some areas started from late September. Based on RFE data, significantly below normal rainfall received thus far include larger areas of Sanaag, Sool and southern parts of Bari (Sool –Sanag Plateau) in the North; coastal areas of Central and parts of Mudug; Shabelle regions and coastal areas of Juba (Map 1). Field reports for October indicate a timely start of *Deyr* rainfall in the country with the exception of the Jubas, which delayed a dekad. The spatial distribution of the rains is average in most areas but poor in large areas of Sool (Sool plateau, and Central Nugaal valley), Sanaag, Bari and Coastal *Deeh* of the Jubas. As a mild El-Nino is predicted during the October-December 2012 rainfall season, the *Deyr* rains are likely to be average to slightly-above-average. However, the chance of a moderate to stronger El Nino and of rain continuing into January has decreased considerably since August.

According to the e-MODIS satellite derived NDVI percentage anomaly for the 3rd dekad of October, there is a significant improvement of vegetation in many parts of the country, which is attributed to good rainfall performance in September-October. However, large deviation of the NDVI from LTM is depicted in most of Lower Shabelle and Lower Juba regions (Map 2). Improvement of vegetation is expected with the progress of the ongoing *Deyr* season.

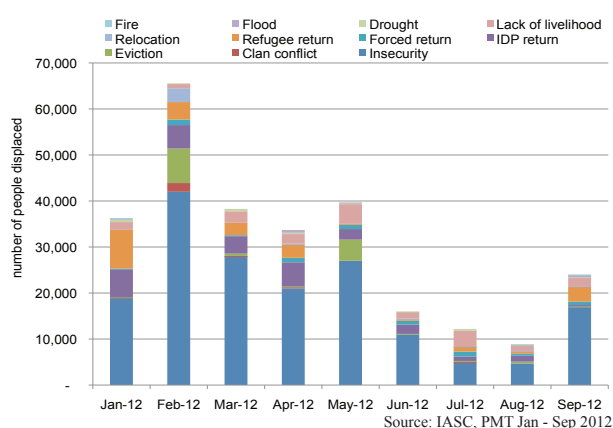
In late September, river floods were reported in Shabelle regions due to heavy rainfall in the upper streams of the rivers; flooding persisted also in October. Additionally, river flooding was reported in the upper steams of Beletweyn (Hiran) region, while flash floods occurred in some villages of Bay as well as Beletweyn town in October. In all cases floods caused loss of property, including livestock, housing and crops. A tropical storm (Murjan) hit northern region of Bari on 24, 25 and 26th October, which was characterized by strong winds and heavy rainfall.

CIVIL INSECURITY

Between August and October 2012, civil insecurity continued to affect the South-Central parts of the country, causing human displacements, losses of lives and livelihoods, hampering of commodity flows and humanitarian access. The violent political confrontations occurred in Lower Shabelle and Lower Juba regions where the government and its allies captured Marka (27th Aug'12), Kismayo (28th Sep'12)) and Wanlaweyn (7th Oct'12)¹. In Central, tensions prevailed in Dhusamreb and Elbur areas which are under the control of pro-government forces. In the North, FSNAU field reports indicate that the Buhodle conflict between the Somaliland government and the anti-government militias of Sool-Sanaag-Cayn (SSC) subsided during August-September and mediations between the warring groups are ongoing. Major conflicts occurred in other parts of the country during the reporting period.

According to Inter-Agency Standing Committee's population movement tracking system, clan conflict and insecurity-induced displacements increased from 4,900 to 17,000 people in the July-September period (Figure 1). This increase is mostly attributable to the massive population displacements from Kismayo before the government takeover the early October. On average, 15,000 persons were internally displaced between July and September on a monthly basis, of which about sixty percent on the account of insecurity. However, overall, about 1.36 million people are displaced within the country according to UNHCR estimates (refer to UNHCR's Map on Total IDPs by Region, October 2012 at <http://data.unhcr.org/horn-of-africa/country.php?id=197>).

Figure 1: Monthly Population Displacements Countrywide



The conflict hampered intra-regional commodity flows resulting in the increased prices of imported commodities (vegetable oil, rice), particularly in Juba regions. Access to labour is also constrained in the conflict areas, particularly in Lower Juba and Bakool regions (see Urban section). In the North, despite ongoing mediations that contained the Buhodle conflict, the trade between Buhodle and Burco is limited, affecting food prices in Buhodle district. The ongoing insecurity in South-Central remains a limiting factor for humanitarian access. According to UNOCHA, only three percent of the total international humanitarian staff present in the country between June and September were in South-Central (OCHA Somalia Humanitarian Access reports, June/September 2012).

AGRICULTURE

During October 2012, FSNAU undertook a rapid assessment to estimate off-season crop harvest in Lower Shabelle, Gedo and Juba regions and to assess *Deyr* planting activities in the South. According to the assessment results, a total of 6,225ha of off-season maize, sesame and cowpea were harvested in the riverine areas in late September to early October. The off-season maize harvest, which was collected in the riverine areas of Lower Shabelle, Middle and Lower Juba and Gedo regions, is estimated at 2,700MT. In addition, 344Mt of off-season sesame and cowpea was collected in Middle Juba. Compared to the projections made during the *Gu* 2012 assessment, the off-season maize harvest is significantly lower in Lower Shabelle (less than a half of the projected harvest) as well as in Middle Juba (20% less than projected). Pest outbreaks, lack of irrigation and moisture stress are the main factors that contributed to reduced production. However, in Gedo and Lower Juba the estimated off-season production is 20-25 percent higher than earlier projections because of moderate *Hagaa* rains (L. Juba), good irrigation and less pest damage. The estimates of *Gu* 2012 plus off-season harvest in Lower Shabelle, Juba and Gedo regions are summarized in the (Table 1).

Table 1: *Gu* 2012 (*Gu* plus Off-season) Harvest

Region	<i>Gu</i> 2012 Production in Mt	<i>Gu</i> 2012 as % of <i>Gu</i> 2011	<i>Gu</i> 2012 as % of <i>Gu</i> PWA(1995-2011)
Lower Shabelle	28,000	83%	45%
Middle Juba	2,900	146%	28%
Lower Juba	1,800	185%	13%
Gedo	1,200	179%	24%

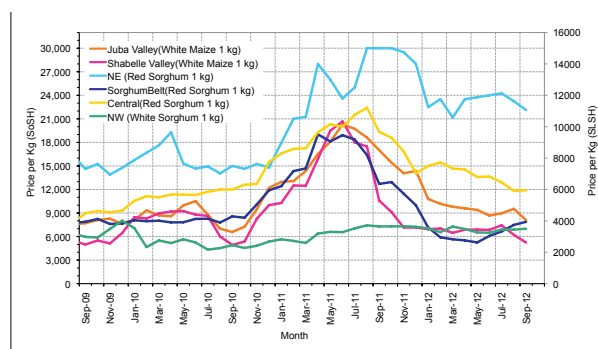
¹ The key towns in the South, which are under government control include Balad, Afgoye, Marka and Wanlaweyn (Shabelles), Kismayo, Afmadow and Badhaade (Juba), Dolow, Beledhawa and Luq(Gedo), Baidoa and Qansahdhere (Bay), Huddur & Elbarde (Bakool) and Beledweyne (Hiran).

In the Northwest, there are good prospects for *Gu-Karan* harvest as a result of good performance of *Karan* rains (late July-Sept 2012). The harvest estimates will be available by the end of November after completion of the FSNAU *Gu-Karan* crop assessment.

Early start of moderate *Deyr* rains (late Sept '12) in the southern regions facilitated *Deyr* planting (irrigated maize and dry sowing in the agropastoral areas). Normal planting pace is reported in the South. Farming activities for off-season crops (e.g. harvesting, transporting and threshing of maize) and on-going *Deyr* 2012 planting have generated labour opportunities for poor households (July-Sep 2012). Agriculture labour wages in rural catchments increased by 10-25 percent between July-September. However, the wages have declined in Middle Juba (4%) due to insecurity and poor off-season harvest.

Maize prices have shown a decreasing trend in southern Somalia in July-September 2012 in most reference markets (9% to 33%) following the increased supply of cereals from *Gu* harvest to the markets. The highest decline (33%) is recorded in Middle Shabelle due to above average *Gu* harvest. However, maize prices have increased in Bakool (17%), and retained in Middle Juba and in Gedo. On the other hand, sorghum prices show an increasing trend (6% to 17%) in most southern markets following poor sorghum harvest in the *Gu* 2012 season. In the central and northern regions, cereal prices have decreased slightly (8%) in July to September 2012. October trends indicate a further price decline (4%). In Northwest, white sorghum price remain stable between July- September, showing a slight increase (2%) in October. Yearly comparisons indicate decline in the maize prices (44-66%) in southern Somalia with the highest decline recorded in Middle Juba (66%) because of better *Gu* 2012 production compared to *Gu* 2011. Compared to a year ago, the local red sorghum price is considerably lower in the markets of South (22-75%), Central (39%) and Northeast (26%) (Figure 2).

Figure 2: Monthly Trends in Local Cereal Prices



Land preparation, Bayaxow - riverine, Jowhar, M/Shabelle, FSNAU, October, 2012

LIVESTOCK

Pasture and Water Conditions

Pasture/browse and water conditions are good to average in most parts of the North as a result of near normal *Gu* 2012 rains, prolonged *Karan* and early *Deyr* rains in September-October 2012. Exceptions are large parts of Sool Plateau and eastern part of Nugaal valley. Unusual October rains received in Guban livelihood alleviated the water shortages that prevailed since July. From mid-October, water, pasture and browse have also improved in the Coastal *Deeh* of Bari and the central regions. In the South, pasture/browse and water conditions have improved across the regions with the start of *Deyr* rains with the exception of Coastal *Deeh* in Lower Shabelle and Juba regions. Price of water returned to normal in most key pastoral areas as early *Deyr* rains replenished most of the water sources. Opportunistic normal migration to rained areas in search of better pasture is reported in all regions.

Livestock body condition continued to improve across the country as result of improved rangeland conditions. Goat kidding started in late September 2012 and will continue to increase throughout the coming *Deyr* season. Medium cattle birth was reported in the South during *Hagaa* (July-Sept) peak period following conception that occurred in *Deyr* 2011. Milk production improved in most parts of the country following goat kidding, low to medium camel calving (*Gu* 2012), cattle calving during (*Hagaa*); camel calving is expected from November 2012 and onwards in most of the southern regions.



Camel with average body condition, Wisil, Hobyo, Mudug, FSNAU, October 2012

Livestock exports and prices were on the rise in the July-September 2012 period due to high demand and trader stocking for the *Hajj* festival. In September, 294,012 heads of livestock were exported through Berbera, 26 percent higher compared to July 2012 (232,800 heads). However, livestock exports through Bossaso port have declined by 37 percent in September compared to July due to high taxation imposed by the local government¹. The livestock export is expected to increase in October 2012 in view of the high demand for *Hajj* festival. All five abattoirs in Galkacyo, Beletweyne, Burao and Mogadishu have not operated since October 2009.

Local quality goat prices showed mixed trends during July-September 2012. They have increased slightly in the Sorghum Belt (4%), Shabelle (3%), Juba (9%); declined in Banadir and Northwest (5%), while remaining relatively stable in the Central and Northeast (Figure 3). The increase in the South is attributable to good livestock conditions and the increased market demand for the *Hajj* festivities. In September, local quality cattle prices increased marginally in Juba and in Shabelle (7%), in the Sorghum Belt (9%) and in the Northwest (3%), compared to July, due to increased demand for *Hajj*. October market price data indicate an increasing trend of cattle and goat prices.

MARKETS AND TRADE

From July to October, the Somali shilling (SoSh) has held steady against the U.S. dollar (USD). Money dealers project a continued tight range for trading in the near future. At the end of October regional markets quoted the SoSh at 20,765-22,822 per U.S. dollar, barely changing from the July range of 20,696-22,637. These stable exchange rates follow steady SoSh appreciation from late 2011 with the SoSh gaining by 20-31 percent when compared to the October last year. From July to October, the Somaliland shilling (SISH) only appreciated slightly (~4%) in the markets of SISH zone. However, the SISH had depreciated (14%) over the past year (since Oct 11), related to modest inflation and to the printing of new currency notes.

In most markets using Somali Shilling, prices of essential imported commodities such as diesel, vegetable oil, and wheat flour have either remained stable or decreased slightly (2-7%) from July to September. The largest price decrease (7%) was for imported red rice in the Shabelle Valley trade catchment (Daafed, Afgoi, Merka, Qoryoley, Jowhar, and Adan Yabal markets), possibly due to the seepage of relief supplies into the markets. However, red rice and wheat flour prices have recorded small increases of 5 to 7 percent from July to September in Mogadishu. October trends for most imported commodity items indicate relative stability. Annual price change recorded in October indicate that the prices of these items have dropped by nearly a third or more in the markets that use the Somali Shilling, largely underpinned by strengthening of the Shilling with fairly stable international prices.

In the Somaliland shilling markets, prices of these imported food items were relatively stable from July to October. However, over the past year, prices of rice, sugar, and wheat flour declined slightly (4-14%) while diesel prices and vegetable oil increased slightly (5-7%). Improved port operations in Berbera, Mogadishu, and Bosasso, the monsoon rough seas season, and humanitarian assistance flows have been the primary drivers of the observed price trends. Price movements for most commodities have generally followed international price trends. The exception is the international prices of wheat, which continued to increase for the fourth consecutive month in September, in contrast to the trends on local markets where wheat prices were stable. However, global wheat flour prices in October dropped slightly when compared to September.

The aggregated Consumer Price Index (CPI) for the country shows relative stability in the July to September period, reflecting the somewhat firm prices of the major commodities that make up the bulk of the consumer basket, including local sorghum and wheat flour (Figure 4). Annual inflation rates decreased significantly (25%) in the SoSh areas (South-Central, and Northeast) due to food price crises last year while remaining unchanged in North SISH areas.

¹According to field reports that livestock export volume that Bossaso port handling has been decreasing since the peak Hajj period developed. The main factor behind the decrease is that traders especially export dealers from Somali region of Ethiopia had rerouted to Berbera port due to the proximity of Saudi market and lesser levies/taxes than Bossaso port and livestock holding ground (i.e; ground holding levy of Bossaso: Cattle- 23\$, camel: - 23\$, Sheep/goat - 7.5\$, while for Berbera Cattle - 19.5\$, camel -19\$, Sheep/goat - 7\$,. Port tax of Bossaso for cattle: 12.7\$; for sheep/goat: 2.4\$, while in Berbera was cattle: 12\$, sheep/goat: 2\$.)

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

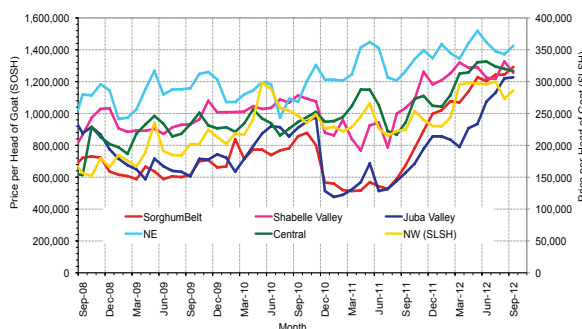
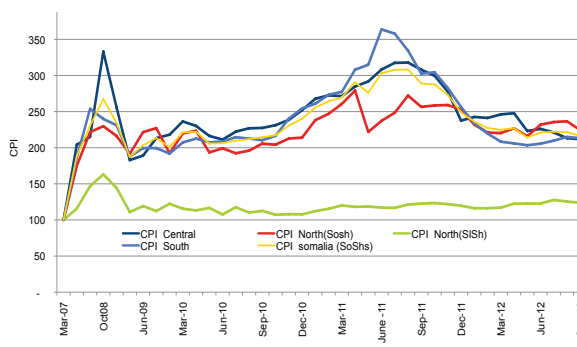


Figure 4: Monthly Trends in Consumer Price Index (CPI)



NUTRITION

The Nutrition Situation in September-October 2012

According to the World Health Organisation's (WHO) report "*Somalia Emergency Weekly Health Update, Oct 13-19, 2012*", despite the October floods in Beletweyne, "...the number of reported suspected cholera cases remained stable, with a cumulative daily reporting range of 17-22 cases from 4 MCHs in the district". WHO report further indicates outbreaks of suspected cholera across Somalia as stable for the season, except for Bay where the numbers are elevated (12 cases reported in 1 week). Seasonal outbreaks of acute watery diarrhea and suspected cholera are likely to aggravate the currently precarious situation in the South, especially in Beletweyne district and Bay region. In the South, the nutrition situation is likely in *Critical – Very Critical* phases, sustained from the *Gu* 2012.

Based on evolving food security trends, the nutrition situation in the North is likely *Serious*, except for West Golis/Guban and Nugal Valley livelihood zones, which are likely to have improved to *Critical* from *Very Critical* in *Gu* 2012. The health facility data for July-September 2012 on the numbers of malnourished children visiting the facilities indicates the following:

- West Golis' health facilities continue to show a high proportion (>20%) but fluctuating trends of acutely malnourished children (sustained since the *Gu* 2012).
- In Nugal Valley, over 10 percent of children visiting health facilities are acutely malnourished (sustained since the *Gu* 2012).
- In the Hawd of Northwest, more than 10 percent of children visiting health facilities are acutely malnourished, indicating a decrease from >15 percent in the *Gu* 2012.

The nutrition situation of the IDPs remains of concern due to their vulnerability considering low/ lack of assets, minimal income opportunities and heavy reliance on humanitarian assistance. In the *Gu* 2012, the nutrition situation in most of the assessed IDP settlements was identified as *Very Critical* (the exception was Hargeisa IDP settlement with *Critical* nutrition situation).

FSNAU is currently undertaking the Deyr 2012 nutrition surveys in northern and central urban and IDP populations. The nutrition surveys in the remaining livelihoods are scheduled in November-December 2012. For details please refer to the September-October Nutrition Update accessible on the following link: <http://www.fsnau.org/downloads/Nutrition-Update-September-October-2012.pdf>



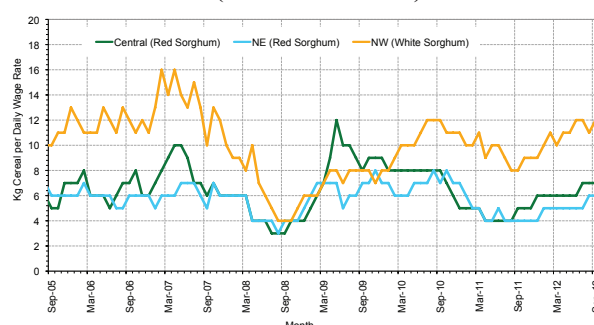
A severely malnourished child with MUAC < 11.5 cm

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

The urban food security situation remains unchanged in post-*Gu* 2012 with an estimated 530,000 people in food security crisis. The food price fluctuations have significant impact on urban food security given that most urbanites depend on markets for the largest part of their food intake. However, in the reporting period the cost of the minimum expenditure basket (MEB) has been relatively stable in most regions. Specifically, it has reduced slightly (2-6%) in the Jubas, Lower Shabelle, Galgaduud, parts of Mudug and in most regions of the North and increased slightly (1-5%) in Banadir, Bay, Gedo and Hiran. However, the cost of living increased in Bakool (17% increase in the food cost of the MEB) due to increase in food prices as a

Figure 5: Regional Trend in Terms of Trade Cereal to Labour (Central and North)



result of poor *Gu* cereal harvest in agropastoral areas and prevailing insecurity. Togdheer is the only region in the North that exhibited an increase in the cost of the MEB (11%) due to increased price of sorghum (23%) resulting from low supply from the South as well as from Ethiopia.

In September, the highest cost of the MEB was in the North SoSh zone (Sool, Sanaag, Bari and Nugaal), ranging between SoSh 3,565,000 and SoSh 4,595,000 (~US\$ 170-216); the lowest cost of the MEB is in the South, SoSh 1,720,000-2,474,000 (US\$ 77-111), particularly in the major producing regions Bay, Lower Shabelle and Middle Shabelle regions (US\$ 77-84), which have the lowest cereal prices in the country. The cost of the MEB in Central and Northwest were SoSh 2,652,000-3,209,000 (or US\$ 122-145) and SISH 912,000-1,060,000 (or US\$ 144-167), respectively.

Labour wage rates in most parts of the country were generally stable between July and October. However, relatively large decreases in wage rates were recorded in Juba regions (16-21%) due to ongoing conflict, dysfunctional Kismayo port which used to provide labour opportunities and poor seasonal performance that limited farm labour. In US dollar currency terms, the casual labour wages are highest in the northern regions, equivalent to US\$ 5-7 per day and are lowest in parts of South, particularly in the Shabelles, Bay and Bakool regions (US\$ 2-3 per day).

As the *Gu* 2012 urban surveys in the North and assessments in South-Central showed, about 28-30 percent of the urban population in the North and about 72-94 percent of the urban poor in the South-Central depend on casual labour. The purchasing power of the urban poor, expressed in the terms of trade (ToT) between daily labour wage and locally-produced cereal prices showed mixed trends in the country in July-October period (Figure 5 and 6). The ToT has increased in parts of the South, especially in the Shabelle regions, from 8 kg in July to 12 kg in September and October. The increase is attributed to decreased maize prices following good *Gu* cereal production (Middle Shabelle), some off-season maize harvest (Lower Shabelle) and stable labour wages. The ToT has not changed in other parts of the South (Gedo and Bakool), in Central (Galgaduud and Mudug) and in parts of the North (Nugaal, Sanaag, W.Galbeed and Awdal). A slight ToT decline of 1-2 kg/daily wage was observed in parts of the South (Hiran, Bay, Lower Juba and Banadir) and North (Togdheer and Bari) but the terms in these regions remain favourable (9-17 kg/daily wage). The lowest ToT among southern regions is recorded in Bakool (5 kg/daily labour wage) due to highest sorghum price (SoSh 10,125/kg) and lowest labour wages (SoSh 46,250/daily wage). The highest ToT, ranging 13-17 kg, was recorded in the markets of the southern regions (Lower Shabelle, Hiran, Banadir and Middle Juba). In October 2012, the ToT between daily labour wage rate and cereals was considerably higher (116 % in the South-Central; 66% in the North) compared to the same period last year.

RURAL

Northern Regions

Sporadic, localized light to moderate rains and flash floods resulted in regeneration of pasture, browse and water in the key pastoral livelihoods of the northern regions in Hawd and Golis-Guban of Togdheer, Sool Plateau of Bari, Kakaar Dharoor, East Golis, Coastal *Deeh* of Bari and upper Nugaal. Most of the main water sources such as *berkads*, *dams* and *ballies* are replenished and water prices remain stable from late September in these livelihoods. However, larger part of Sool Plateau of Sanaag and Sool regions and eastern part of the Nugaal valley received poor *Deyr* rains thus far. However, no significant improvements in browse and pasture conditions were observed in the concerned livelihoods of Golis-Guban of Awdal, W/Galbeed and Sanaag due to the negative impacts of poor rains in prior seasons and limited precipitation in the current *Deyr*. Migration of livestock is largely normal mostly occurring within the livelihood zones from less rained to better rained areas with good water sources.

Figure 6: Regional Trend in Terms of Trade Cereal to Labour (South)

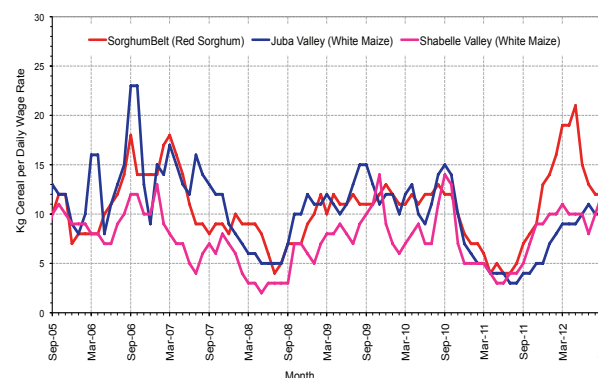
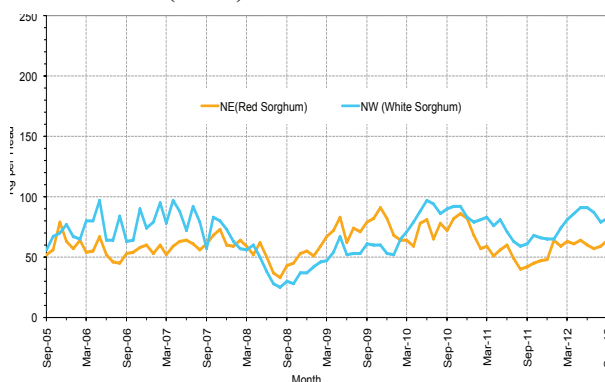


Figure 7: Regional Trend in Terms of Trade Cereal to Goat (North)



Livestock (camel, sheep and goat) body condition in most of the pastoral livelihoods is average to near average with the exception of concerned areas of Golis-Guban of Northwest, Coastal *Deeh* of Bari and Nugaal and Nugaal Valley of Sool where the body conditions have deteriorated from average to poor in July-September period. However, quick recovery is imminent as *Deyr* rains intensified during October. Milk production for all species is below average due to short lactation period of goat/sheep (2-3 months) and limited number of lactating camel with reduced milk yield during *Hagaa*. However, medium goat kidding and camel calving is anticipated from November 2012 up to early January 2013 in most livelihoods which will improve milk availability at household level. The gradual improvement in incomes from the frankincense in East Golis and from fishing in coastal areas of (Calula, Qandala, Bossaso, Lasqoray and parts of Iskushuban districts) is reported. The frankincense collection started in May and is going to continue up to November with gradual decline. Fishing activities started in October and will continue up to April 2013 (peak period of fishing). In Togdheer Agropastoral, flash floods received from the watershed zone encouraged farmers to plant sorghum and water melon crops. Average establishment of the planted crops is reported.



Poor camel body condition, Guban, Lughaya, Awdal, FSNAU, October 2012

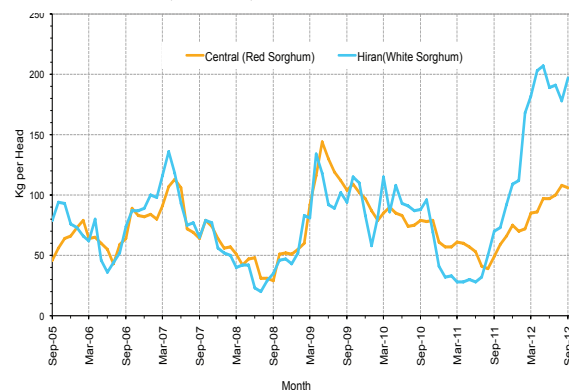
Reduced cereal flow from southern Somalia as a result of poor *Gu* harvest has curtailed availability of locally produced cereals on the markets leading to a moderate price inflation, particularly in the Northwest and in pockets of the Northeast. However, imported food commodities (rice and wheat flour) are available and the prices are stable in some markets or declined in others since July 2012. In September 2012, ToT between local quality goat and cereal (rice) increased in Northeast by 30 percent compared to July 2012 (from 61kg/head to 79kg/head) and is more than 50 percent higher than a year ago (Figure 7). October trend exhibited decline of 8 percent (from 79 to 73 kg/head). In contrast, in the Northwest, ToT between local quality goat and rice has dropped (11%) from 64kg/ head in July 2012 to 57kg/ head in September 2012 following a marginal decline of local quality goat prices (5%) as a result of oversupply from Ethiopia and increase in rice price (7%). However, the ToT in September was still 33 percent higher than the same month last year due to significantly higher local quality goat prices. October trend shows an increase of 11 percent (from 57 to 63 kg/head).

Central (Galgadud , Mudug) and Hiran Regions

Improvements in pasture and browse in the areas that received near normal rains (Hawd, most of Cowpea Belt and parts of Addun) during *Gu* 2012 season were short-lived due to livestock in-migration from rain deficit (Coastal *Deeh*) areas of central regions. As the *Deyr* rains have started effectively in central regions in the first *dekad* of October, pasture and water conditions improved in most parts of the pastoral livelihoods, easing the water crisis in many parts of the Cowpea Belt and *Addun* livelihood zones. In August, water price in the rural areas increased by 10 percent (from 3,000 to 3,312 SSh/20 litre jerrican) compared to June 2012. However, in October water price considerably declined (by 32%) compared to August. Normal livestock movement in search of better pasture/browse and water are common across the central regions.

In Coastal *Deeh* and parts of Addun, livestock body condition deteriorated to below average due to poor pasture within the livelihoods and overgrazing in neighboring livelihoods of Hawd and parts of Cowpea Belt where pasture and water were average during *Gu* 2012. However, rains received in late September and October improved the situation and quick livestock recovery is expected in most livelihoods. Land preparation and planting of cowpea and sorghum crops started in September-October in the Cowpea Belt. These crops are at the establishment stage. Kidding/ lambing were low to medium during *Hagaa* and the beginning of *Deyr* as conception of small ruminants was medium during the last *Gu* season. However, currently conception of sheep/ goat is average, hence average kidding/lambing could

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



be expected by March-April 2013. Camel calving was low in the last *Gu* 2012 as most of the camel conceived during *Deyr* 2011/12. Given 13 month gestation period, camel calving will occur from November onwards. Camel milk prices have declined in July-September (21%) due to increased supply and the prices will drop further in November with the expected camel calving. Milk prices are significantly lower compared to the same month last year (47%). In October trend indicate further decline of (17%).

Goat local quality price slightly declined (4%) in September 2012 compared to July 2012 following the end of *Ramadan* and deterioration of body condition in rain deficit areas, but the price is considerably higher (37%) compared to the same month of the previous year. The ToT for local quality goats to cereals (wheat, rice) have slightly decreased (3-4%) between July and September 2012 but is still very favourable. Specifically, the ToT of goat/ rice and goat/ wheat are currently standing at 61kg of rice/ head and 74kg of wheat/ head. In October, the respective ToT were 62kg (rice) and 76kg (wheat). ToT between local quality goat and red sorghum has also increased (6%) in July-September 2012 to 106kg of red sorghum/ head (Figure 8). In October, further increase of ToT (9%) is recorded. The annual comparison of the ToT between local quality goat and cereals (rice, wheat and red sorghum) indicate considerable increases (110%; 95% and 116%, respectively). The significantly improved ToT compared to previous year is due to tremendous increase in local quality goat price and decline in cereal prices.

Southern regions

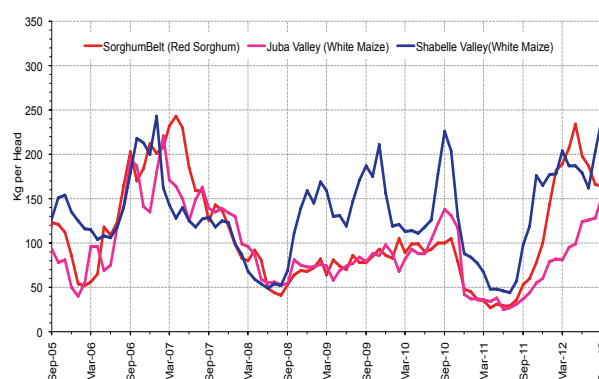
Poor performance of *Hagaa* rains (July–September 2012) resulted in a reduced off-season maize crop harvest in the riverine areas, with 89 percent of planted area being harvested. Off-season maize harvest was lower than projections made during *Gu* 2012 analysis in Lower Shabelle and Middle Juba. Average *Gu* plus off-season harvest of the two regions is 43 percent of the average *Gu* production for 1995-2011. Conversely, Gedo and Lower Juba regions received good off-season crops as a result of relatively better *Hagaa* rainfall performance and good irrigation. However, the combined *Gu* and off-season harvest in these two regions is only 28 percent of the average *Gu* production for 1995-2011. Sufficient cereal stocks are available until the next harvest in the maize producing regions of Middle and Lower Shabelle. However, sorghum supplies are diminishing in the Sorghum Belt due to poor *Gu* harvest (22% of the average of *Gu* harvest in 1995-2011).

Deyr rains enhanced pasture condition, replenished water catchments and improved livestock body condition, which currently are considered normal across the regions. Milk availability is average due to cattle calving that started during *Hagaa*, in July-August. As pasture was still poor during *Hagaa*, milk availability on the markets was still low. However, price of cattle milk indicate declining trend (8-15%) in October in most southern regions, with the exception of Shabelle which mostly supplies milk Mogadishu markets rather than local markets. Yearly cattle milk price is lower by (10%) in Sorghum belt and juba compared to October 2011, while Shabelle valley remained stable. Local quality goat prices have increased in July-September from 5 to 21 percent in all southern markets due to periodic high demand for *Hajj* with highest increase Middle Juba due restocking in agropastoral (Jilib district). October trend is either stable or increase in most markets of South. As field exhibited, *Deyr* planting is proceeding as normal across the southern regions, which is facilitated by the good start of *Deyr* rains. In light of the mild *El-Nino* projection the crop development is expected to be normal. As a result agriculture labor rate increased by (12-35%) with highest increase (36%) in Middle Shabelle as last *Gu* 2012 was average to above average and followed current normal *Deyr*.



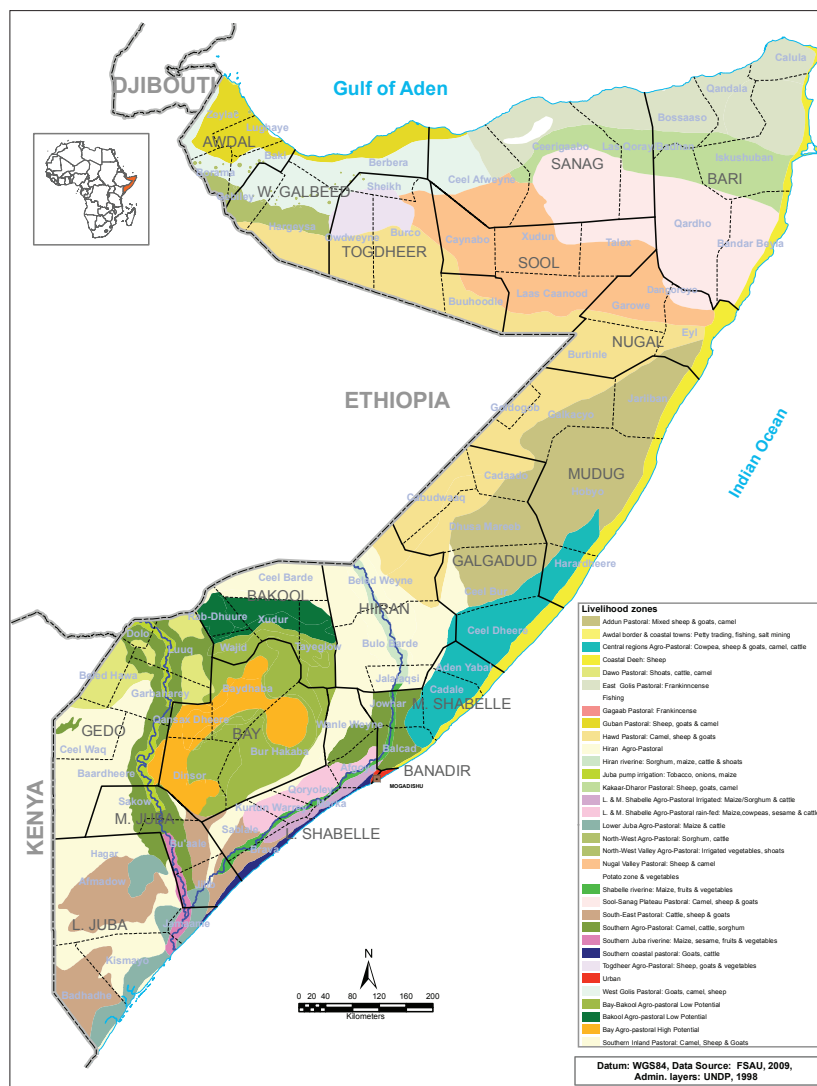
Replenished natural water catchment, Wargalo, Hobyo, Mudug region, FSNAU, October 2012

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



The purchasing power of poor households showed an improving trend as a result of decline in maize prices by 10 to 30 percent in September compared to July 2012 (Shabelle, Juba and Hiran), and trend in October indicate further decline. As a result, ToT labour/maize have increased in the range of 14 to 55 percent in most southern regions. A particularly high increase in ToT (55%) is recorded in Lower Shabelle. In October 2012, the ToT labour/maize in maize-producing regions is in the range of 10-12 kg/daily labor rate which is 70-150 percent higher compared to a year ago (Oct. '12), mainly due to decline of maize price (40-47%). The terms of trade (goat/sorghum) in most of the Sorghum Belt regions (Bay, Bakool and Gedo) has shown a declining trend, reducing from 187 kg in July to 164 kg in September. This is due to 6-17 percent increase in sorghum price in most markets. October trend indicate an increase of (9%) due to the goat price increase (5%) and sorghum price decline (4%) compared to preceding month. The ToT between maize and goat in September 2012 is double (204%) of the levels the same month last year (Figure 9). Cereal prices are likely to continue increasing trend until the next seasonal harvest, which will start from December.

SOMALIA LIVELIHOODS ZONE MAP



Recent and forthcoming publications and releases

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 FSNAU Nutrition Update (Sep-Oct 2012), November 2012
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