

Climate

Markets

Nutrition

Agriculture

Livestock

**Civil
Insecurity**

**Emerging
Regional
Issues**

KEY

ISSUES

The food security situation in all livelihood zones of Somalia remains unchanged with an estimated 870 000 people in Crisis and Emergency (IPC Phases 3 and 4 respectively), 72 percent of which represent Internally Displaced People (IDPs) concentrated in settlements across the country. Additionally, 2.3 million people remain Stressed (IPC Phase 2). Acute malnutrition levels are likely to remain at Serious to Critical levels across Somalia from

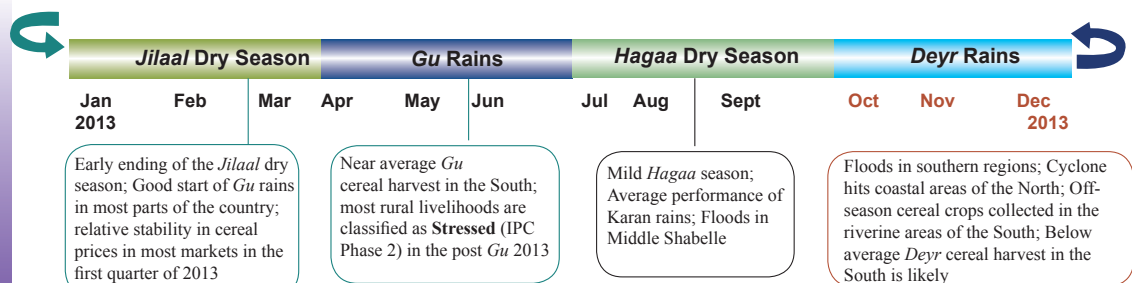
October to December, 2013 as indicated by the Health Information System (HIS) trends. Deterioration in the nutrition situation is expected in Addun livelihood of the Central region, while the East Golis livelihood and Baidoa IDPs are expected to show improvement. The nutrition situation is also likely to deteriorate in areas of South-Central following the withdrawal of Medecins Sans Frontieres (MSF) over security concerns a few months ago.

Preliminary estimates suggest overall below normal *Deyr* 2013/14 cereal harvest in southern Somalia, both for sorghum and maize. This is the result of moisture stress experienced in most crop-dependent livelihoods in the South during the October planting season, leading to poor crop germination and replanting of crops. The outlook is unlikely to change despite favourable rains forecasted up to the third week of November. In addition, floods in Middle Shabelle caused by river breakages resulted in inundation of about 18 percent of the irrigated crop fields. Sorghum crops normally account for 60 percent of the total *Deyr* cereal harvest in southern Somalia. In Bay region, which normally supplies more than half of the *Deyr* sorghum in the South, near normal *Deyr* sorghum harvest is expected. However, in other regions of the Sorghum Belt (Bakool, Gedo, Hiran), sorghum return is likely to be below normal. Meanwhile in the Shabelle maize producing areas, maize harvest is also expected to be below normal. The major reasons include a combination of hazards experienced in Middle Shabelle such as floods and recently erupted clan conflict in riverine areas of Jowhar as well as increased cultivation of the more profitable sesame in lieu of maize in Lower Shabelle. Both regions would normally account for about two-thirds of the total *Deyr* maize production of southern Somalia. In Juba regions, *Deyr* cereal harvest is likely to be poor but the regions may benefit from off-season harvest in early 2014. The outlook for white sorghum production in agropastoral areas of Northwest is positive on account of relatively good performance of Karan rains (Jul-Sep 2013). However, the contribution of the region to the total domestic annual cereal production of Somalia is not very significant (14%) compared to southern regions (86%).

The recent cyclone that hit parts of northeastern Somalia is reported to have caused loss of lives, damage to infrastructure and livestock losses. The cyclone-affected coastal areas of the Northeast have come out of food security crisis only a year ago. The new shock could cause a rapid deterioration of food security status of the affected population. The magnitude of deterioration will be assessed in the forthcoming FSNAU/ partner food security assessment in December 2013. Overall October rainfall performance was also significantly below average in pastoral areas of Juba and Gedo regions. In the rest of pastoral areas, *Deyr* rains in October 2013 and the first dekad of November 2013 performed well and resulted in the regeneration of pasture and improved water availability. Overall, livestock holding among poor pastoralists is lower than normal in most pastoral and agropastoral livelihoods, apart from camel pastoralists in Lower Juba. Currently, milk production is near normal to normal in most parts of the country and is expected to increase with an anticipated increase in livestock reproduction from November 2013 onwards.

Maize prices exhibited declines across southern Somalia since July 2013, as a result of near normal *Gu* and *Gu*-offseason harvests collected in August-September, 2013. However, sorghum prices show moderate increases (10-20%) in the same period due to below normal *Gu* sorghum harvest. Cereal prices also increased moderately on a year-to-year basis in all regions of the country apart from Juba regions, which recently enjoyed very good *Gu* harvest. Milk prices have increased over the *Hagaa* (Jul-Sep 2013) dry season, but were considerably lower in October compared to the levels a year ago (Oct 2012) in most areas of the country indicating improved availability. The Consumer Price Index (CPI) is moderately elevated in the South on account of moderate increase in sorghum price, which accounts for 32 percent of the CPI minimum consumption basket cost.

The United Nations Refugee Agency (UNHCR) estimates that 1.1 million people remain internally displaced in Somalia. UNHCR reports population movements of about 28 000 people over the past three months, mostly in the southern regions. The security situation is likely to remain volatile in most parts of South-central until the end of 2013 with persistent access challenges faced by humanitarian agencies.



Somalia Seasonal Timeline & Key Events

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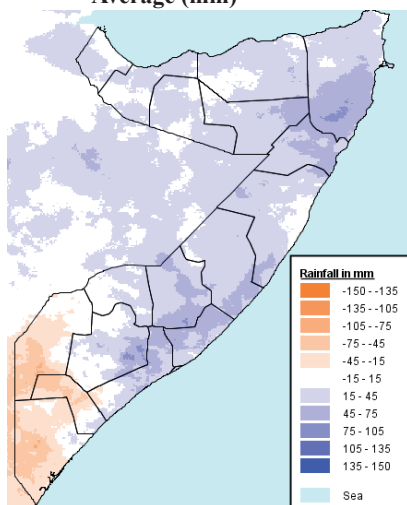
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SECTOR HIGHLIGHTS

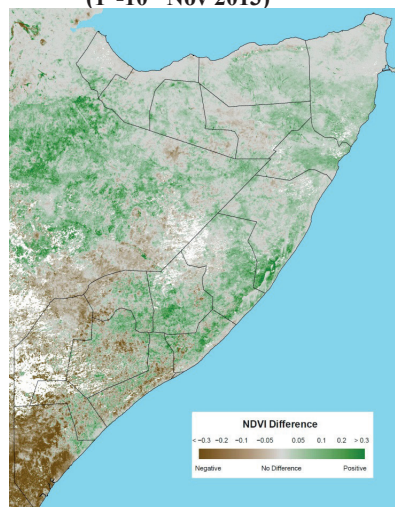
CLIMATE

**Map 1: October 2013 Rainfall
Difference from Long Term
Average (mm)**



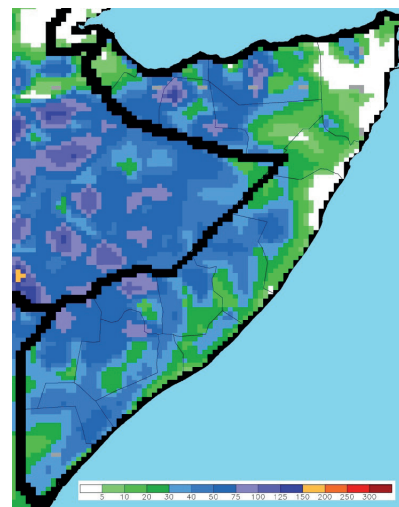
Source: TAMSAT

**Map 2: E-MODIS NDVI Difference
from Long Term Average
(1st-10th Nov 2013)**



Source: NOAA/FEWS NET

**Map 3: Rainfall Forecast for
11th-19th Nov 2013 (mm)**



Source: NOAA, Climate Prediction Center

The 2013 *Deyr* rainy season (Oct-Dec) started in early October with mixed trends in terms of amount, temporal and spatial distribution across the country. Light to moderate rains fell in most parts of the country in October with amounts ranging between 10 and 75 millimeters (mm). Rains were erratic and very low in Lower and Middle Juba, Bakool, parts of Gedo regions, pockets of Hiran (Beletweyne) and parts of Central the regions (Hawd and Addun zones). Comparison of the actual rainfall estimates for October 2013 and the October long-term mean (1983-2011) indicates generally enhanced rainfall in many parts of the country. Significant rainfall deficits are evident in large areas of Juba and Gedo regions (Map 1). *Karan* rains (July-Sep) were light to moderate throughout the season in Northwest. Moreover, unusual light to moderate rains continued into October in the Northwest (Awdal, W.Galbeed and, parts of Togdheer and Sanag regions).

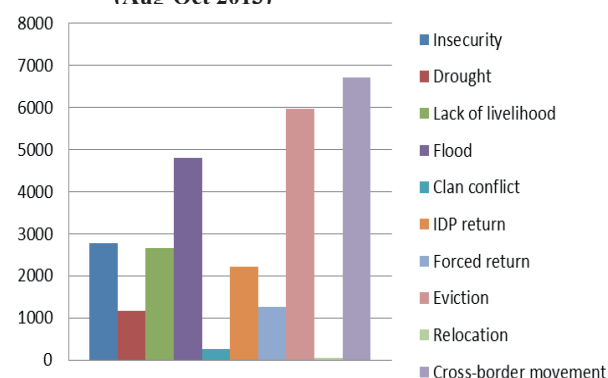
Meanwhile, the passage of a weak tropical disturbance in the north western Indian Ocean has brought moderate to heavy amounts of rainfall across the *Gulf of Aden* and parts of northern Somalia. These rains are likely to continue through the second dekad of November causing localized flooding in parts of Bari region and Nugal regions. In Middle Shabelle wide open river breakages have flooded parts of Jowhar and Balad districts. Running water from Middle Shabelle (Jowhar floods) is advancing towards Lower Shabelle and likely to inundate farms under Afgooye and WanlaWeyne districts. Minor floods occurred also south of Jalalaqsi in Hiran region in October. Heavy rains in Gedo region in the first dekad of November have led to increased river levels and subsequent inundation of farmland due to breakages.

Vegetation conditions are good in most regions of Central and North, as measured by the Normalized Difference Vegetation Index (NDVI) satellite imagery, due to the effect of recent rains. However, depressed vegetation compared to normal is depicted in pastoral areas of Lower Juba, Gedo and Bakool regions, which can be attributed to poor rains in October (Map 2). According to the Global Forecast System (GFS) seven-day rainfall forecast (11th to 19th of Nov, 2013) produced by the National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Centre, there is a likelihood of light to moderate rains in many parts of the country (10-70mm). However, localized areas in Northwest and South are predicted to receive heavy rainfall (Map 3).

CIVIL INSECURITY

During the third quarter of the year 2013 (Aug-Oct) incidences of violence such as suicide bomb explosions, land mines, targeted killings, and armed confrontations, have continued in the southern regions, particularly in Mogadishu, Hiran, Gedo, Bay, Bakool and Lower Juba. Most of these incidences were directed at government officials and their sympathisers, while scores of civilians have also been either injured or killed. International military operations (air raids) targeting the insurgents have been reported (Barawe and Jilib in Lower Shabelle and Middle Juba regions, respectively) but there were no reports of casualties of civilians. Isolated clan conflicts mainly involving revenge killings (central and Sool regions) and resource-based conflicts (mostly over agricultural land) have been reported in Middle Shabelle and Hiran regions.

Figure 1: Monthly Population Displacements Countrywide (Aug-Oct 2013)



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

UNHCR estimated population movements of about 28 000 over the last three months (August-October, 2013) in Somalia. The spontaneous returns of Somali refugees from Kenya, Ethiopia, Saudi Arabia and Yemen have been reported. Cross-border movements accounted for about 24 percent (6 700 people) of all population movements in the reporting period, followed by evictions from public/government buildings (21%), floods (17%), and loss of livelihoods and insecurity (10% in each case) [Figure 1]. Most of the movements reported occurred from and within the regions of Banadir, Lower Juba, Gedo, Shabelle, and Bay.

Apart from losses of lives and property, insecurity continued to hamper agricultural activities in Middle Shabelle on account of the clan-based resource conflicts in Gedo-Barkan villages of Jowhar district. Additionally, trade and market activities in South-Central are impeded; a typical example is the double taxation of goods moving from government-controlled areas to insurgent-controlled areas. Insecurity also affected the delivery of humanitarian assistance, with the most recent example being the withdrawal of MSF (Aug 2013) from the Southern regions (e.g. Bay, Middle Juba). In addition, clan disputes in Central and parts of Sool regions caused restricted pastoral migration. Insecurity is likely to sustain in parts of South-Central until the end of 2013 as military operations (Federal Governments supported by the African Union Mission in Somalia) are expected to continue.

AGRICULTURE

In October 2013, FSNAU undertook a rapid assessment to estimate off-season crop harvest (in Lower/Middle Shabelle, Gedo, Bay and Juba regions) and to assess *Deyr* planting activities. According to the assessment results, an estimated 4 050 tonnes of off-season crops, including maize (2 500 tonnes), sesame (1 500 tonnes) and cowpea (50 tonnes) was harvested from late September to early October 2013. The off-season maize harvest is in line with projections made during the *Gu* 2013 assessment. Estimates of the *Gu* 2013 plus off-season harvest in the above-mentioned regions are summarized in Table 1 below.

Table 1: *Gu* 2013 (*Gu* plus Off-season) Harvest

Region	<i>Gu</i> 2013 Harvest in Tonnes	<i>Gu</i> 2013 as % of <i>Gu</i> Average for 1995-2012
L/ Shabelle	50 300	84%
Middle Juba	9 900	108%
Lower Juba	7 600	132%
Gedo	5 800	118%
Bay	33 200	94%

In the Northwest, crop yield and overall cereal production for *Gu-Karan* harvest is likely to be higher than projected earlier. This is attributable to good performance of *Karan* rains (late Jul-Sep, 2013). Updated harvest estimates will be available by end of December 2013/ early January 2014 upon completion of the FSNAU crop assessment.

According to field reports, below average cereal production, particularly for maize, is expected in maize producing regions of Shabelle. The major reasons include: poor rains in October 2013, which resulted in low planting as well as poor crop germination; floods (Jowhar and Balad districts of Middle Shabelle) that led to inundation of about 8 000 hectares (2 500 hectares of established crops and 5 500 hectares of land prepared for planting); low maize prices that prompted cultivation of more profitable sesame (Lower Shabelle). In Juba regions, off-season planting

of maize/ sesame is expected in early 2014 in the *desheks*, which were purposefully inundated by local population through openings in river banks (breakages). However, the *Deyr* cereal harvest in Juba regions is likely to be poor. Despite the poor rains in October 2013, riverine areas of Hiran and Gedo are less of a concern due to irrigation prospects and normal planting which is going on, although high fuel costs for pump irrigation pose challenges for poor households. The impact of recent floods in Hiran and Gedo regions (*see Climate sector*) on crops was minimal.

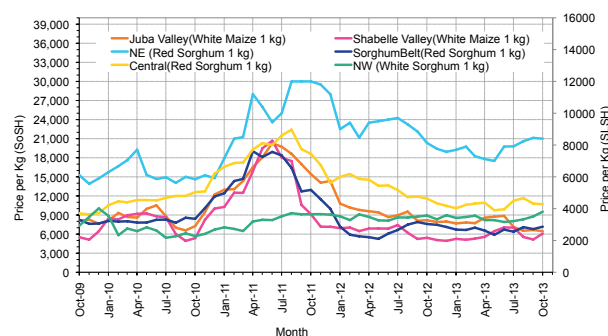
Despite the successive replanting due to moisture stress in October 2013, near normal sorghum is expected in the Bay region, the major sorghum producing region in Southern Somalia. The outlook is based on the assumption of normal rainfall performance in November 2013 and no pest outbreaks. Prospects of sorghum production are also positive in Shabelle regions. However, poor sorghum production is expected in Middle Juba, Bakool, northern part of Gedo, Hiran Agropastoral (particularly in Beletweyne) due to poor rainfall performance. The aforementioned regions normally account for about 20-25 percent of total sorghum production in southern Somalia. Over the last three months (Aug-Oct, 2013) maize prices exhibited decline in southern markets, while sorghum prices increased marginally in the Sorghum Belt. This trend is attributable to lower than normal sorghum production in *Gu* 2013 and normal maize production. Yearly comparisons show maize price increase in Shabelle (12%) and a decline in Juba (21%), while yearly sorghum price in Sorghum Belt regions (Bay, Bakool, Gedo, Hiran) declined marginally (6%). White sorghum price also shows some increase in the Northwest between October-August, 2013 (17%) as well as compared to 12-months ago (18%) [Figure 2].

LIVESTOCK

Pasture, browse and water conditions were average in most of the northern regions, as a result of average to above average *Gu* 2013 rains, prolonged *Karan* and near average to average *Deyr* rains. Despite poor and erratic rains in October 2013, pasture, browse and water availability improved in large parts of southern regions except pastoral and Southern Agropastoral livelihoods of Gedo. In central regions pasture, browse and water ranges from below average to average. Livestock migration is normal across the country.

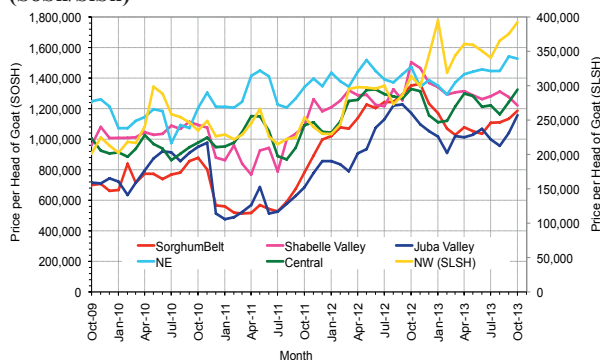
Livestock body condition for all species remain near normal to above normal (score 3-4 on a 5-point Pictorial Evaluation Tool [PET] scale for livestock) in most of the country as a result of improved rangeland conditions. Exception is Gedo region where livestock body condition was below average to average (PET score 2-3). Cattle and goats that conceived last *Jilaal* and *Gu* seasons (2013) respectively started calving and kidding from September 2013 and this is expected to progress during the course of *Deyr* season 2013. Similarly, small cohorts of camel are also expected to give birth in this *Deyr* season. Consequently, milk production is near normal to normal, but is expected to improve further from November 2013 onwards. Livestock prices were on the rise in Hiran, Central and Northern regions between July – September 2013 period due to high demand resulting from the *Hajj* festival. In southern Somalia livestock prices showed mixed trends, particularly for goats, while cattle prices increased in most of the southern markets in the same period. Yearly comparison of livestock prices in most markets indicate stable to increasing trends for all species (Figure 3).

Figure 2: Monthly Trends in Local Cereal Prices



Sorghum Planting, Sakow, Middle Juba. FSNAU, October, 2013

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

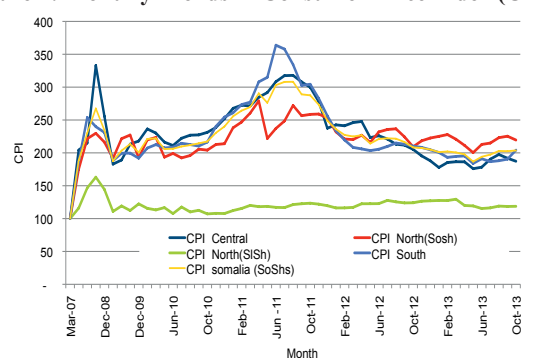


Improved Cattle Body Condition, Bu'ale, Middle Juba. FSNAU, October, 2013

MARKETS AND TRADE

From July to October 2013 the Somali shilling (SoSh) depreciated slightly against the U.S. dollar (USD) in the main markets of southern Somalia. At the end of October 2013, Banadir regional markets quoted the SoSh at 21 000 per USD, slightly depreciating from the July 2013 level of 19 240 per USD. The rates were stable in the Central and Northeast markets. Compared to a year ago (2012), the Somali shilling appreciated modestly (5-10%) in the South-Central while being stable in the Northeast. This is attributed to increased economic investments, particularly in Banadir region. From July 2013 to October 2013, the Somaliland shilling (SiSh) only appreciated slightly in the markets of SiSh zone due to the inflow of dollars from livestock exports revenues. However, the SiSh has remained stable over the past year.

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



In both, the SoSh and SiSh areas, prices of essential imported commodities such as diesel, vegetable oil, and wheat flour have generally remained stable in most markets on sustained imports and the stable/declining prices on the world markets. However, some of these commodities were slightly elevated in the Juba trade catchment primarily driven by increased conflict and taxation by various independent local authorities.

Annual price changes recorded in October 2013 indicate that the prices of these items are significantly lower in the Somali shillings using markets, largely underpinned by the strengthening of the shilling, improved Mogadishu port capacity and fairly stable international prices. Price movements for most commodities have generally followed international price trends.

During July-October 2013, CPI rose by nine percent in the South due to a peak in the price of sorghum, a key commodity in the minimum consumption basket. The CPI remained relatively stable in the other markets of the country. However, over the past one year the CPI decreased modestly (5%) throughout the country.

NUTRITION

HIS trends suggest **Serious** to **Critical** levels of acute malnutrition will likely persistent across Somalia from October to December 2013. Deterioration in the nutrition situation is expected in Addun livelihood of Central, while East Golis and Baidoa IDPs are expected to show some improvement. The nutrition situation is also likely to deteriorate in areas of South-Central following the withdrawal of MSF over security concerns a few months ago.

In Northwest, sustained **Serious** levels of acute malnutrition in Hawd, East Golis, West Golis, Nugal valley and Sool livelihoods and Alert levels of acute malnutrition in Northwest Agropastoral livelihoods are expected during October-December 2013. The stable nutrition situation in the Northwest is mainly linked to improved access to food, especially milk, due to good livestock production and strong purchasing power. In addition, field reports indicate no disease outbreak in the Northwest region, while immunization by the Ministry of Health in collaboration with World Health Organisation (WHO) and other health partners throughout the region is on-going. The relatively improved access by humanitarian agencies in Northwest also continues to act as a mitigating factor to prevent further deterioration of the nutrition situation.

A mixed picture of either sustained or improved nutrition situation in the Northeast livelihoods is expected in Hawd, Nugal, Sool and Coastal *Deeh* and East Golis because of improved food access, primarily milk. In Central region, sustained **Critical** phase among the populations of the Coastal *Deeh* livelihoods is likely. In the month of August, confirmed malaria was the leading cause of morbidity and 53 percent of the cases were reported from central zone, while the remaining 47 percent were from southern Somalia. Suspected measles increased by 53 percent from the month of July 2013, with 231 cases reported in August 2013. About 80 percent of these were children under the age of five.^[1] In southern Somalia, the post *Gu* 2013 nutrition situation in the pastoral and riverine livelihoods in northern

^[1] Somali Health Cluster Bulletin. August 2013



Mother with malnourished brothers in Huddur, FSNAU, 2013

Gedo region is expected to be sustained as **Critical** phase, while in Southern Gedo sustained **Very Critical** levels of malnutrition are likely among pastoral and riverine populations. Sustained **Serious** levels of acute malnutrition among pastoral and agropastoral population in Juba and Critical levels in riverine populations are expected because of low humanitarian response. **Very Critical** levels of acute malnutrition witnessed among pastoral population in Bakool and agropastorals in Bay region during *Gu* 2013 analysis, is expected to sustain until December 2013. No change is expected in the nutrition situation in Kismayo IDPs (**Critical**) as well as Dhobley IDPs (**Very Critical**). Improvement in the nutrition situation among Baidoa IDPs is projected given that no disease outbreaks were reported.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In the post-*Gu* 2013 (Aug-Dec) analysis an estimated 775 000 people in the urban areas of Somalia were classified as **Stressed** (IPC Phase 2). Of these, 57 percent are in the South, while the rest are concentrated in the North (37%) and Central (6%) regions. In addition, an estimated 45 000 people are in **Crisis** (IPC Phase 3) [Bari- 30 000, Lower Juba-10 000 and Hiran- 5 000]. The food security projections were based on assumptions of stable to reduced cost of living and strong purchasing power of the urban population in August-December 2013. The food security situation in most IDP settlements was classified as **Crisis** (IPC Phase 3), apart from Dhusamareb and Dhobley, which were classified as **Emergency** (IPC Phase 4). IDPs represent 72 percent of the total of 870 000 people projected to be in **Crisis** and **Emergency** phases across Somalia during August-December 2013.

A trend analysis of the last three months indicates relatively stable cost of the Minimum Expenditure Basket (MEB) in local currency terms in most regions of the country. The exceptions include moderate increases in Lower Shabelle (12%), Lower Juba (12%), Bakool (14%), Banadir (15%) and Middle Shabelle (21%) stemming from seasonal increases in local cereal prices. Compared to the same month last year (2012), the MEB cost was 3-12 percent lower in most regions but it was slightly elevated (3-11%) in Bari, Sanaag, Sool, W/Galbeed, Lower Juba, Banadir and Middle Shabelle. Reduced cost of living over the past twelve months was due to lower prices of local and imported food.

For the period July-October 2013, purchasing power, measured through Terms of Trade (ToT) between casual labor wage and most commonly consumed cereals exhibited mixed trends. ToT reduced by 1-5 kgs in most markets but remained stable or increased (1-3 kgs of cereals per daily labour) in Lower Shabelle, Lower Juba, Banadir markets and in a few markets in the North. An exceptionally high increase in labour wage/ maize ToT (by 12-16 kgs) is observed in Buale and Jamame cities of the Juba regions. The increase is mostly driven by significantly low maize prices due to exceptionally good *Gu* and off-season harvests in major cereal producing districts of Buale and Jamame of Juba regions. In most regions of Somalia, ToT is higher compared to a year ago (Oct '12) due to lower cereal prices (Figures 5 and 6).

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

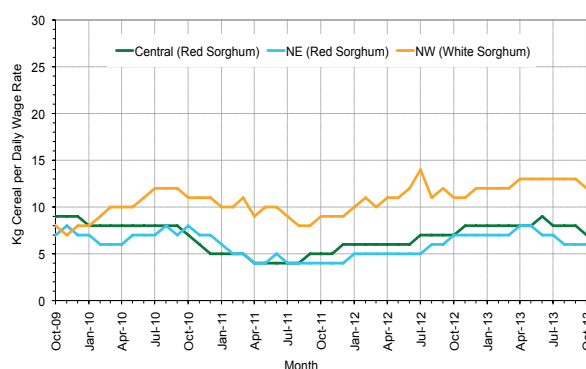
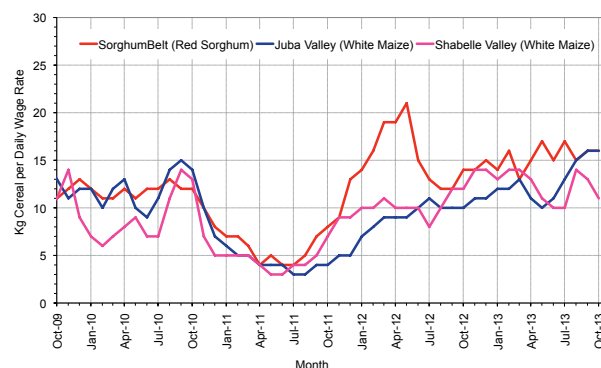


Figure 6: Regional Trend in Terms of Trade between Daily Labour Wage and Cereals (South)



Northern regions

In the July 2013 analysis, all rural livelihoods of the region were classified **Stressed** (IPC Phase 2) in the post *Gu* 2013 (Aug-Dec). The major assumption for this classification included improved milk production, livestock prices and purchasing power of the rural households during the projection period.

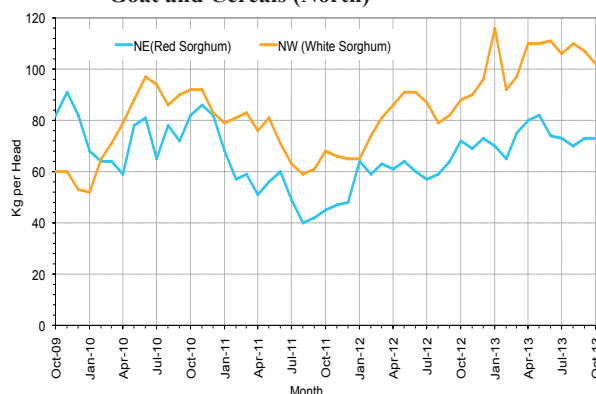
Pasture/browse and water conditions vary from near average to good in most parts of the North as a result of good *Gu* 2013 rains, prolonged *Karan* and early *Deyr* rains in September-October 2013. Livestock body condition in most of the pastoral livelihoods ranged from average to above average. Medium calving, kidding and lambing is progressing in the course of the *Deyr* season. Milk production for all species is average to near average with an improving trend in most of the northern regions. For instance, in October fresh camel milk declined by 11 and six percent in the Northeast and Northwest respectively, compared to the preceeding month. Exceptions include Coastal *Deeh* of Bari region and west *Guban* in Northwest where milk production remained low although camel calving, which is anticipated to start in late November is likely to lead to improved milk availability by end of 2013. On November 9, 2013, tropical cyclone hit the coast of the northeast regions of Somalia (Map 3). Various sources indicate possible human death and livestock (sheep and goat) losses as a result of the cyclone. FSNAU will verify the situation during Post *Deyr* preliminary assessment in late November.

Good performance of *Karan* rains is likely to result in improved sorghum and maize yield for the coming *Gu/Karan* harvest compared to FSNAU's earlier projections. The harvest is expected to start with some delay, from late November 2013, due to the delayed onset of *Karan* rains and poor *Gu* 2013 rains. In Togdheer region, farmers started planting of sorghum and vegetables and should benefit from grass fodder production. Terms of trade between goat and rice increased over the last three months as well as compared to a year ago (2012), following a marginal increase of local quality goat prices as a result of high demand for *Hajj* and stable/decline in rice price. The highest increase of 46 percent in ToT goat/rice was recorded in the border market in Togwajale, reflecting an increased demand for goats both from the Ethiopian as well as the Somali side (Figure 7).

Central regions

In the post-*Gu* 2013 period (Aug-Dec, 2013), most livelihoods of the region were classified as **Stressed** (IPC Phase 2) with the exception of Coastal *Deeh*, which was classified in **Crisis** (IPC Phase 3) due to improved livestock reproduction and prices as a result of favorable *Gu* rains. During the *Hagaa* dry season (Jul-Sep 2013), pasture and water conditions have declined in all livelihoods, and most significantly in the Coastal *Deeh* where *Gu* 2013 rains performed poorly. However, *Deyr* rains in October 2013 have improved water and pasture in the Coastal *Deeh* and other livelihoods of Central. Current livestock migration patterns were generally normal in all livelihoods.

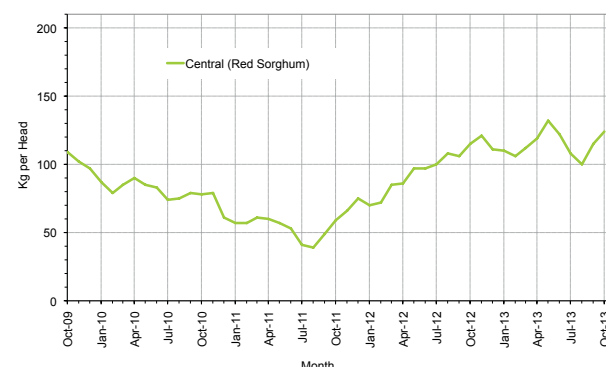
Figure 7: Regional Trend in Terms of Trade between Goat and Cereals (North)



Map 3: Area affected by Tropical Cyclone



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



Livestock body conditions remain largely normal in most areas of the central region. Field reports indicate medium kidding/ lambing of goats and sheep in September and October 2013, contributing to improved milk availability. However, livestock conception (all species) has been very low during *Hagaa* and at the start of the *Deyr* season. ToT between livestock and cereals (rice) improved in the last three months (Jul-Oct 2013) in most markets of central regions with the highest increase of 35 percent recorded in Galkáyo. The improvement in ToT is attributable to increased local quality goat price due to *Hajj* demands and a cereal price decline. Conversely, the ToT declined (by 22%) in Eldher due to increased insecurity and poor road access during the rainy season. On an annual basis, the ToT indicates a 10 percent increase across the markets of Central (Figure 8).

Southern regions

During August-December 2013 the food security situation in most rural livelihoods of the southern regions was classified as **Stressed** (IPC Phase 2) with the exception of Hiran Agropastoral - **Crisis** (IPC Phase 3) and Southern Inland Pastoral (camel pastoralists) livelihood of Lower Juba **Minimal** (IPC Phase 1). The forecast was premised on the assumptions of near normal *Deyr* rains, normal *Deyr* planting activities, cereal stock availability at household level in farming areas (except Hiran Agropastoral) and improved livestock production as a result of positive effects of several consecutive favorable seasons.

Currently, cereal stocks are available among poor households in Lower Shabelle and Bay regions for the year ending 2013, while cereal stocks for poor households in Gedo and Juba regions are likely to last up to mid-December 2013, two months longer than usual due to good *Gu* and *Gu* off-season harvests. Below average maize production is expected in maize producing areas of Shabelle. In Juba regions, *Deyr* cereal harvest is likely to be poor but the regions may benefit from off-season harvest in early 2014 (see *Agriculture sector*). Similarly, sorghum production is also likely to be below normal due to the anticipated poor crop performance in Middle Juba, Bakool, northern part of Gedo, Hiran Agropastoral (particularly in Beletweyne). However, near normal sorghum harvests are expected in Bay and agropastoral areas of Lower Shabelle regions.

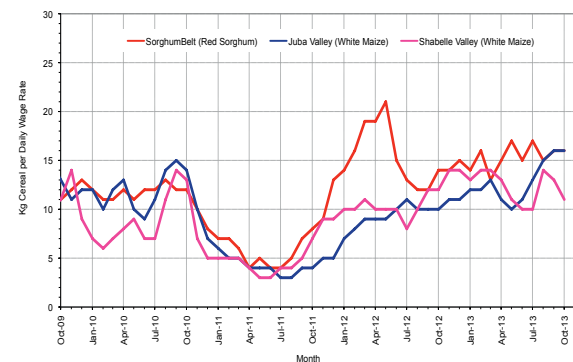
Over the last three months (Aug-Oct 2013), agriculture labour wages increased in riverine areas of Shabelle regions as well as Bay regions due to increased demand for *Deyr* planting. ToT between agriculture labour and cereals indicate mixed trends across crop-dependent livelihoods. The highest ToT (21kg) was recorded in Bay and Middle Juba, while the lowest was in Middle Shabelle (6kg) [Figure 9].

Deyr rains enhanced pasture and water conditions, although in some areas water catchments have been replenished only partially due to erratic rainfall. Normal livestock body condition (PET score 3-4) was reported across the regions, except Gedo (PET score 2). Milk availability was near average to average as a result of average cattle calving that started in August 2013 and average lambing/ kidding of sheep/goat in September 2013. Camel milk (lactating camel) yield has also improved with the improved pasture while more camel calving is expected from November 2013 onwards, which will further improve milk availability and access.



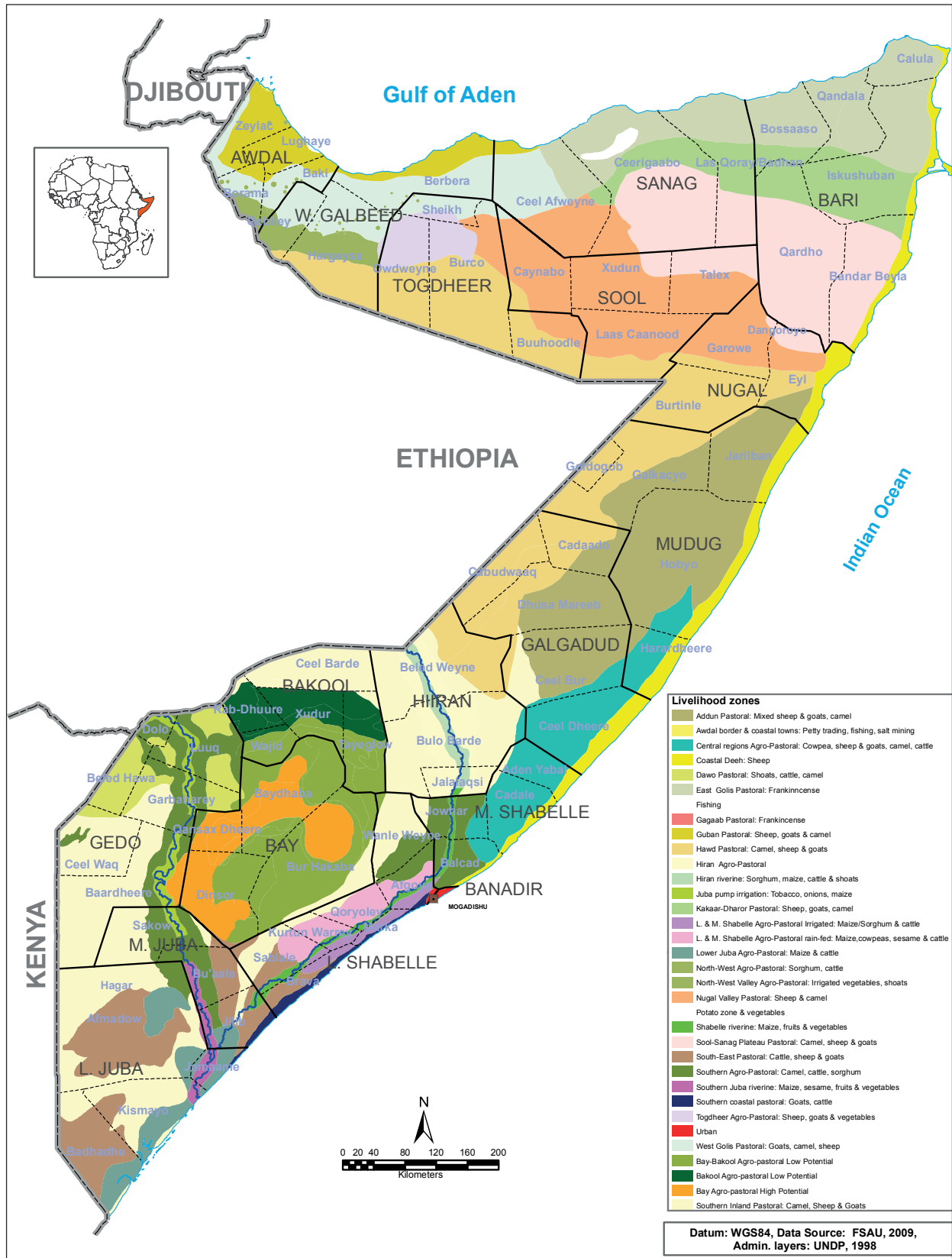
Poor Camel Body Condition, Addun, Mudug. FSNAU, September 2013

Figure 9: Regional Trend in Terms of Trade between Daily Labour Wage to Cereals (South)



Maize Off-Season Harvest, Luuq, Gedo Riverine. FSNAU September-October, 2013

SOMALIA LIVELIHOODS ZONE MAP



Recent and forthcoming publications and releases

Nutrition Update (November 2013) *forthcoming*

Nutrition Technical Report Post *Gu* 2013 (October 2013)

Food Security and Nutrition Analysis Technical Report Post *Gu* 2013 (October 2013)

NOTE: The above publications and releases are available on the FSNAU website: www.fsnau.org

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