

Climate

Markets

Nutrition

Agriculture

Livestock

**Civil
Insecurity**

**Emerging
Regional
Issues**

FSNAU - Somalia

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KEY ISSUES

According to the latest findings from a joint countrywide seasonal assessment by the Food Security and Nutrition Analysis Unit (FSNAU) and partners, updated based on the new population estimates for Somalia published by UNFPA (October 2014), 1 014 000 people across Somalia will be in Crisis and Emergency (IPC Phases 3 and 4) through December 2015. Internally Displaced Persons (IDPs) constitute 62 percent of the total number of people in Crisis and Emergency (IPC Phases 3 and 4), followed by rural (28 %) and urban (10 %) populations. Approximately 3.9 million additional people are classified as Stressed (IPC Phase 2) through December 2015. The above analysis and projections have factored into account the likely food security impacts of a moderate El Nino leading to heavy rains and flooding in riverine and low-lying areas of Somalia.

Based on prevalence estimates from nutrition surveys conducted by FSNAU, an estimated 308 000¹ children under the age of five are acutely malnourished (56 000 of them severely malnourished). FSNAU nutrition surveillance in Buloburto town (Hiran Region) Xudur town (Bakool Region) showed sustained prevalence of Very Critical levels of acute malnutrition in both towns during September 2015.

Hagaa (July-September) dry season impact assessment conducted by FSNAU in September 2015 indicates an estimated 5 035 tonnes of off-season crop harvest in southern Somalia, 17 percent lower than earlier projections, mainly due to erratic and insufficient Hagaa rains. In the Northwest, overall Gu-Karan cereal harvest prospects have improved due to near average to average performance of Karan rains (late August-September 2015).

During the Hagaa season, water and pasture were poor in parts of Togdheer, Sanag, Bari, Juba and Gedo Regions; and very poor in the drought affected parts of Awdal Region. Livestock deaths and goat abortions have been reported in most of these areas. On the other hand, Karan rains (August/September 2015) have improved rangeland conditions in Northwest agro pastoral livelihood zone.

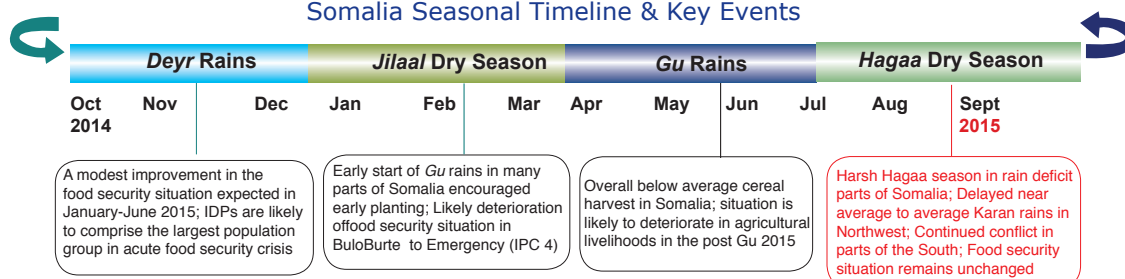
Cereal availability has improved in most markets due to increased supplies from Gu 2015 and recent off-season harvests. In most parts of the country, availability of imported staple and non-staple food commodities is normal, owing to sustained supply with low prices which are in stable or declining trend. The effects of continued trade disruption due to insurgent activities in some urban areas in Southern regions have persisted albeit some improvement in recent months.

Climate forecasts indicate that southern and central regions of Somalia are likely to receive above normal to normal rains for the current Deyr season (October-December 2015), with below normal to normal rains expected in the northern regions of the country. Deyr rains have started in October in most parts of the country, with seasonal agricultural activities already underway in some of the main crop producing southern regions. However, farming activities are likely to be constrained in some areas due to on-going conflicts between government troops and insurgents.

According to UNHCR, 52 344 people were displaced between July to September 2015 as a result of insecurity due to military offensive (31%), eviction (24 %) and due to other security related reasons (23%). Humanitarian operations remain constrained due to insecurity.

¹ For operational response planning and programming purposes, these acute prevalence estimates need to be translated into estimated acute malnutrition burden by taking into account a number of factors such as the prevalence, the incidence correction factor and the population figure.

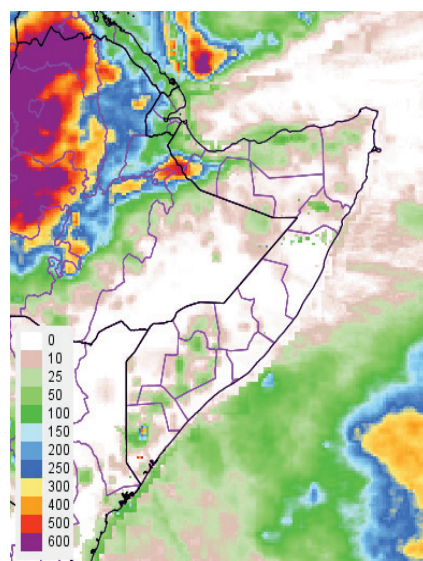
Somalia Seasonal Timeline & Key Events



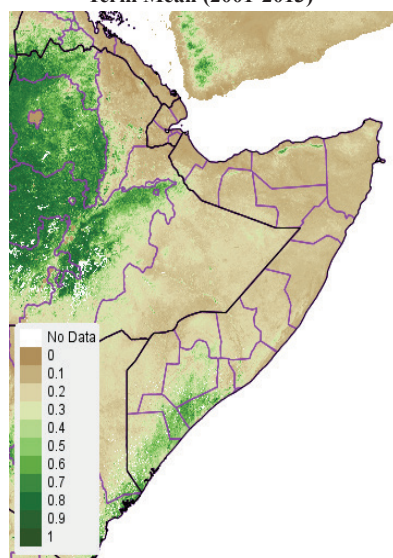
SECTOR HIGHLIGHTS

CLIMATE

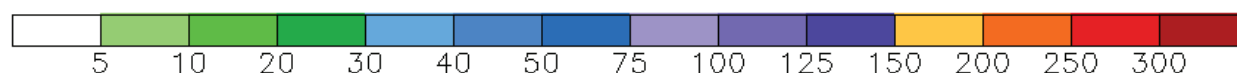
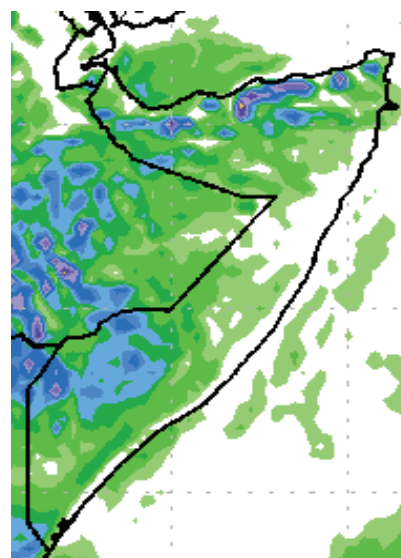
Map 1: July-September 2015 Cumulative Rainfall Estimates (RFE)



Map 2: September 21-30 2015 eMODIS 250sq. mt NDVI Anomaly, Short Term Mean (2001-2013)



Map 3: One week RFE Forecast Valid to 6 November 2015



Generally, the Hagaa season (July-September) was typically dry in most parts of the country. However, there were some showers in areas that normally receive Hagaa rains (Lower Shabelle, Lower Juba and Middle Juba, and Bay Regions) as well as in areas that receive Karan rains (Northwest Regions) - See Map 1. The Hagaa rains were beneficial to standing off-season cash crops in the above areas in the South. Similarly, pastoral and agro-pastoral areas in the Northwest (West Golis, Northern Inland Pastoral and Northwest Agro-pastoral) received Karan rains (July-September) which were vital for crop development and pasture regeneration. Unusual but moderate rains were also reported during September in few pockets in the northeast, particularly in the Northern Inland Pastoral livelihood of Qandala and Qardho. The rest of the country remained seasonably dry. This includes Guban pastoral in the Northwest; the whole of northeast, central and the southern regions of Hiraan, Bakool, Gedo and Middle Shabelle.

Some parts of the country received early Deyr rains during the first dekad of October with below-average to average spatial and temporal distribution. These rains were mostly confined to the key crop producing regions in the South, particularly in Lower Shabelle, Middle and Lower Jubba and Bay regions. However, normal Deyr rains started in the second dekad of October with average to above-average rains received in riverine and agro-pastoral areas of Shabelle, Jubas and Bay region as well as pastoral and cowpea areas of Central. In the Northeast and Northwest, Deyr rains were light to moderate. Satellite-generated rainfall estimates (RFE) confirmed this.

The Normalized Difference Vegetation Index (NDVI) for the third dekad of September (21-30), indicates average vegetation conditions in northern and central regions and above-average vegetation conditions in many parts in Jubas, Shabelles, Bay Regions in the South as well as pocket areas in Sanaag and Woqooyi Galbeed Regions of the Northwest (Map 2).

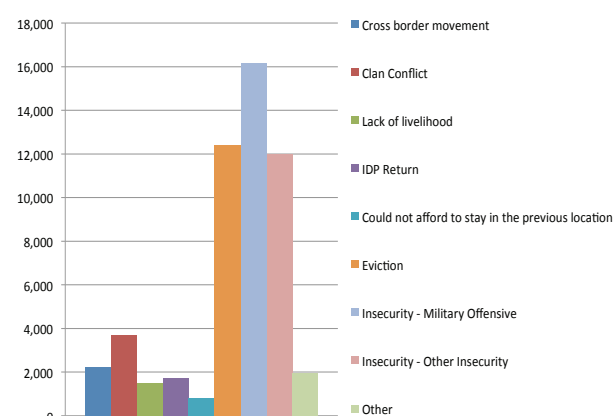
According to the 41st Greater Horn of Africa Climate Outlook Forum outlook for the ongoing Deyr season (October-December 2014), southern and central regions of Somalia are likely to receive above normal to normal rains during the 2015 Deyr season. However, there is an increased likelihood of below normal to normal rains in the northern regions of the country. Guban and East Golis livelihoods in the northern regions are projected to receive near average December-February Hays rains. The current seven-day rain forecast (30 October-6 November) indicates wet conditions in most parts of the country except parts of northeast and central that are likely to experience dry conditions (Map 3).

CIVIL INSECURITY

Between August to October 2015, 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 the incidences were directed at the Somalia Federal Government officials, regional authorities and partners, with scores of civilians were injured or killed. On the other hand, the Government of Somalia together with its allied African Union Mission to Somalia (AMISOM) forces remained in control of the major commercial and administrative towns in the South except Middle Juba region. The withdrawal of government and AMISOM forces from several locations in Lower Shabelle such as Kurten-warey and Janaale and subsequent takeover of these areas by the insurgents has created uncertainty among the residents leading to temporary displacements.

The effects of continued trade disruption in areas that came under government control in 2014 in the Southern regions of Bakool (Wajid and Hudur), Bay (Qansahdhere), Gedo (Bardhere and Burdhubo) and Hiran (Bulo-Burte,) have persisted although there have been some improvement in recent months. Prices of essential staple commodities in these areas have stabilized due to food aid delivered to the affected areas through an organized military convoy (Bulo-Burte); opening up of secondary supply routes (in Hudur through El-Barde) and adjustments made by local traders to bring food to the areas, including through the use of donkey carts and medium sized trucks. However, there are new trade disruptions in Jalalalqsi (Hiran) where the effects are yet to be established. Recent military offensive against insurgent (July 2015) in Bardhere of Gedo region and Qansahdhere and Dinsor in Bay and parts of Rabdure and Tieglow district in Bakool had limited adverse impact on trade routes and livelihoods activities.

FIGURE 1: Population movement, July-Sept 2015 (UNHCR)



Politically motivated clan conflicts in Abudwak (Galgadud) that existed following the successful establishment of Gal-Mudug State (July 2015) have culminated in armed confrontations between Ahlu Sunnah and Galmudug State on 8th -9th of September 2015 leading to loss of lives and widespread displacements for a period of a week. However, the conflicts have subsided now with Galmudug State taking full control of Abudwak town and normal business activities have resumed. In Qoriley (Eastern Hawd of Lasanod district) clashes between two clans were reported. Small scale and localized incidents of insecurity in other location were also reported with limited impact on food security in the affected areas.

According to UNHCR, 52 344 people were displaced between July to September 2015. The main reasons for displacement were insecurity by military offensive (31%), eviction (24 %), due to other insecurity (23%), clan conflicts (7%), cross border movements (4%).

Humanitarian operations remain fraught with difficulties and risks and humanitarian workers continue to be targeted with violence. As a result, complete access to vulnerable people is not yet practical.

AGRICULTURE

In early October 2015, FSNAU undertook a rapid assessment to evaluate the *Hagga* dry season impact on livelihoods of Somalia; assess off-season crop harvest and *Deyr* planting activities (land tillage, sowing, irrigation, etc.) in southern regions. Results from these assessments indicate a total off-season crop harvest of 5 035 tonnes, including maize (3 230 tonnes), sesame (1540 tonnes) and cowpea (265 tonnes) across four southern regions (Middle Shabelle, Gedo, Lower and Middle Juba). The off-season maize production is 17 percent lower than the projections made during the Gu 2015 assessment. This decline is mostly attributed to lower than expected harvest in Middle Shabelle and Lower Juba regions due to erratic and insufficient *Hagga* rains. This is despite higher than previously estimated off-season maize harvest in Middle Juba, attributable to better *Hagga* rains and intensive use of pump irrigation facilities. Estimates of the Gu 2015 off-season harvest in the above-mentioned regions are summarized in Table 1 below.

Table 1: Gu 2015 Maize Off-season Harvest

Region	Planted Areas (ha)	Harvested Areas (ha)	Production (MT)
Lower Juba	2200	1800	1080
Middle Juba	900	450	450
Middle Shabelle	2500	2200	880
Gedo	1520	1270	820
Total	7120	5720	3230

In the Northwest, overall Gu-Karan cereal harvest prospects have improved since the projections made during the Gu 2015 assessment, which is attributed to near average to average performance of Karan rains (late August-September 2015). Updated harvest estimates will be available upon completion of FSNAU/government Gu-Karan crop assessment planned for November 2015.

Seasonal Deyr 2015/16 agricultural activities are already underway in some southern areas, including the Cowpea Belt of Central. These include land preparation, seed planting, ridging for rainwater harvest and early irrigations in riverine areas. The early preparations were prompted by recent forecasts of normal to above normal Deyr rains and the good start of Deyr rains in October. However, farming activities are likely to be constrained in parts of Lower Shabelle (Marka and Barawe), Hiran (Bulo-Burte), Gedo (Garbaharey/Burdhubo) and Bakool (Hudur and Elbarde) regions due to on-going conflicts between government troops and insurgents. Input constraints and soaring costs of agricultural inputs in Hiran may also affect land cultivation in this season. In agropastoral areas of Northwest (Awdal and W. Galbeed), land preparations activities have not begun at a normal pace due to current hot and dry weather conditions. This is expected to exacerbate food insecurity among poor households that have already been affected by very poor Gu harvest.

Cereal availability has improved in most markets due to increased supplies from Gu 2015 and recent off-season harvests. As a result, between July and September 2015 maize prices have declined in the riverine markets of Shabelle (31%) and Juba (10%). However, due to high demand of cereals from neighboring regions as well as central and northern regions, limited humanitarian intervention and below average crop production of Gu 2015 in the regions, the observed low price of local cereals will not be sustained in the coming months as supplies dwindle. In September 2015, the lowest retail maize prices were recorded in the main cereal-producing districts of Lower Shabelle (Qoryoley, 4100 SoSh/kg), while the highest prices were noted in Elwak of Gedo region (13 375 SoSh/kg).

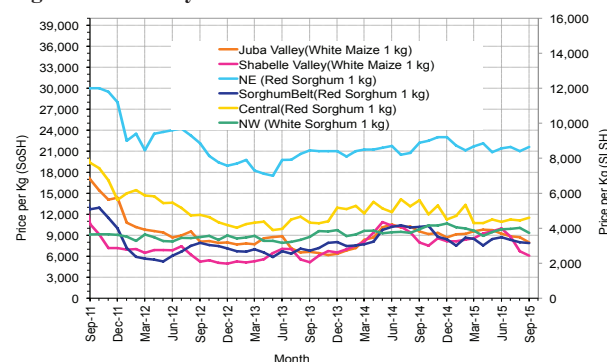
Sorghum 2015 prices have also decreased moderately in Bakool (25%) and Hiran (17%) compared to their levels in July 2015 as a result of increased supply in markets. However, Sorghum prices have increased slightly in Gedo (6%) and Bay (4%) between July and September mainly in response to the below average Gu 2015 harvests and disruption of trade activities caused by recently intensified conflict in these regions. In the Northwest regions, sorghum prices remained mostly stable between July and September 2015 in Awdal, W.Galbeed and Togdheer. In September 2015, the lowest retail price of sorghum was reported in Dinsor (4 500 SoSh/kg) and Qansahdere (4 500 SoSh/kg) of Bay region, while the highest price were recorded in Adanyabal district of Middle Shabelle (24 000 SoSh/kg). The high prices in Adanyabal are due to limited local cereal production, poor roads and lack of humanitarian access.

Year-on-year comparisons show a significant decrease in maize prices in the regions of Shabelle (18% in Middle Shabelle and 25% in Lower Shabelle) and Juba (20% in Middle Juba and 15% in Lower Juba) due to availability of Gu 2015 cereal and offseason harvests in local markets this season compared to Gu 2014. Similarly, the price of sorghum has also declined significantly over the past 12 months in the Sorghum Belt regions (Bay, Bakool, Gedo, Hiran). For example, in Bay region the price was nine percent lower compared to the previous year (September 2014) as a result of relatively better cereal harvest this year and decreased transport costs (decreased fuel prices and road blocks). Similarly, sorghum prices were lower in Bakool (49%), Hiran (55%) and Gedo (2%) compared to September 2014. In northern regions, white sorghum prices were lower (3-5%) compared to their levels in September 2014 owing to availability of imported cereals from Ethiopia.



Husked maize, Tugarey, Jowhar, FSNAU, October 2015

Figure 2: Monthly Trends in Local Cereal Prices



LIVESTOCK

During the typically dry *Hagaa* season (July-September), availability of pasture/browse and water conditions were mixed in agropastoral and pastoral livelihoods of Somalia. Water and pasture remained average in most agro pastoral and pastoral livelihoods of the country due to average to near average Gu rains, which were followed by average to good Karan rains (Northwest) and below average *Hagaa* rains in South. However, availability of water and pasture was poor in parts of Hawd/East Golis in Togdheer, Northern Inland Pastoral (NIP) of Sanag and Bari, upper Coastal Deeh of Bari, parts of Hawd/Addun in Central and parts of Southern Inland Pastoral (SIP) of Juba and Gedo regions due to below average Gu 2015 rains.

In the drought affected Guban Pastoral livelihoods (Awdal region) pasture/browse is very poor across the livelihood as a result of the failed uni-modal Hays rains (December 2014–February 2015). High livestock deaths have been reported in these areas and drought resistant tree species remain the only source of browse for the surviving camels and goats.

Early depletion of pasture with earlier than normal water trucking and consequent increase in water price have been reported in many areas affected by poor rainfall except Guban and upper Coastal Deeh that have permanent water sources (shallow wells and boreholes). Livestock deaths and goat abortions have been reported in most of the above-mentioned rainfall deficit areas.

On the other hand, in Northwest agro pastoral, late Karan rains (August/September 2015) have improved rangeland conditions and led to cessation of water trucking that has been ongoing since July 2015.

During the 2015 *Hagaa* season, livestock migration was normal in most parts of the country, with livestock migrating to local dry season grazing areas. However, there has been abnormal out-migration of livestock from Guban Pastoral and Northern Inland Pastoral livelihood of Bari region.

Livestock body condition remained near average to average (PET score 3) in most livelihoods with the exception of rainfall deficit areas where it is below average. In particular, the body condition of lactating animals was poor to below average (PET score 1-2) due to insufficient pasture. Milk availability and access are average to below average in most livelihoods apart from the rainfall deficit areas where it is poor.

Between July and September 2015, fresh camel milk prices showed a mixed trend across the country. Generally, fresh camel milk prices remained relatively stable or increased moderately in most of parts of the country due to low calving of Camel in last Gu and reduction of milk yield from lactating animals due to seasonal deterioration of rangeland condition.

Local quality goat price showed mild changes between July and September 2015 in most regions. In the markets of Northeast, Northwest, Juba, Shebelle and Central regions, local quality goat price either remained stable or increased marginally, whereas local goat prices increased moderately (by 13%) in Sorghum Belt markets. Annual comparisons indicate marginal to moderate declines in the prices of livestock (local quality goat) in Northwest, Northeast, Central and Southern region, while prices remained stable in Sorghum Belt markets.

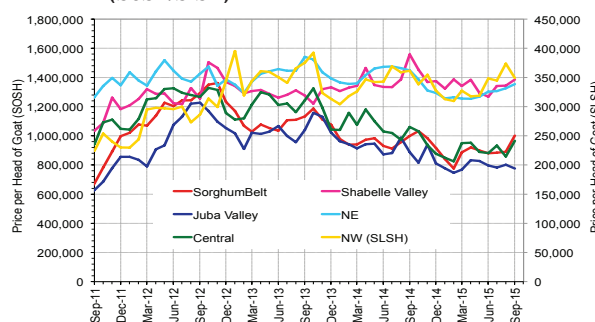
Local quality cattle price increased at mild to moderate rates or remained stable, in Juba, Shabelle, Sorghum Belt and Northwest between July and September 2015. Annual comparison indicates moderate declines in Shabelle and Juba, but increases in Sorghum Belt and Northwest.

According to officially available statistics from Port Authorities, 2 913 820 heads of livestock were exported through northern ports between July and September 2015 (73% through Berbera and 27 % though Bossaso). This figure is 12 percent higher compared to the same period last year (July–September 2014).



Near average Camel body condition, Bossaso.
FSNAU October 2015

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



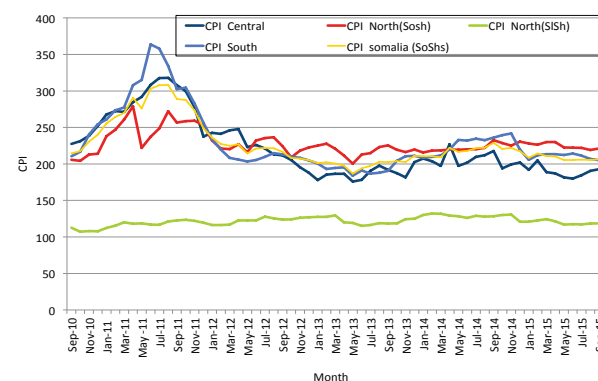
MARKETS AND TRADE

Between July and September 2015 both Somali Shilling (SoSh) and Somaliland Shilling (SiSh) either remained relatively stable or depreciated marginally against the United States dollar (USD) in most of the major markets of Somalia except in Bakool and Banadir where the SoSh appreciated slightly against the dollar. However, compared to last year, both SoSh and SiSh depreciated (6-10%) against the dollar due to reduced flow of dollars in to Somalia in recent months.

In most parts of the country, availability of imported staple and non-staple food commodities is normal, owing to sustained supply with low prices which are in stable or declining trend. Over the July–September 2015 period, prices of rice, sugar, wheat flour and vegetable oil remained mostly stable or declined slightly due to steady supply of imported food items from Bosaso, Berbera and Mogadishu ports supported by favorable international source market prices. The Sorghum Belt zone in particular experienced modest decreases (5-13%) in imported food commodities as a result of increased humanitarian distribution as well as reduction in the number of check points (where illegal taxes are collected) and more areas coming under the control of Government and allied AMISOM forces. Compared to a year ago, the prices of imported items, including diesel, declined in most regions of Somalia at mild to moderate rates (5-15%) due to favorable global market prices. Prices of most imported commodities have generally followed price trends on the international market.

Between July and September 2015, the Consumer Price Index (CPI) remained relatively stable across Somalia reflecting the generally stable prices of major commodities in the Minimum Expenditure Basket-MEB (e.g. local sorghum and wheat flour). Annual inflation rates measured through changes in the CPI decreased significantly in the South (-13%), Central (-12%) and Northeastern (-8%) parts of the country due to reduced local cereal prices as a result of increased local cereal production during the Gu 2015 compared to Gu 2014 and also due to the declining prices of imported food items in the consumption basket of the urban poor.

Figure 4: Consumer Price Index



NUTRITION SITUATION

The integrated nutrition situation analysis conducted by the FSNAU and partners in August 2015 indicated a **Serious** nutrition situation across northern and central parts of Somalia through October 2015, with the exception Northwest Agropastoral livelihood zone, Guban pastoral livelihood zones and urban populations in Bari Region where the nutrition situation was **Critical**.

In the rest of Somalia, the nutrition situation has been classified as **Critical** in the following regions and population groups: Gedo Region (pastoral, agropastoral and riverine populations and Dollow IDPs), Hiran Region (Beletweyne and Mataban Districts), Bay Region (Baidoa IDPs), Lower Juba Region (Dhobley IDPs), Mudug Region (Galkayo IDPs), Mudug and Galgaduud Regions (Coastal Deeh Pastoral and Cowpea Belt Agropastoral livelihood zones).

FSNAU monthly nutrition surveillance in Buloburto town (Hiran Region) Xudur town (Bakool Region) based on Mid-Upper Arm Circumference (MUAC) showed sustained prevalence of **Very Critical** levels of acute malnutrition in both towns during September 2015.



An enumerator taking MUAC measurement

Prevalence of high levels of acute malnutrition (GAM >15%) for the period (July- September 2015) is reported by the health facilities from all livelihoods of Juba. Deterioration in nutrition situation with increasing trends of acute malnutrition among Riverine (from 23.5 % in July 2015 to 31.2% in September 2015) is of concern compared to stable though high levels of acute malnutrition observed by health facilities in Agro pastorals livelihoods (23.2-22.7 %) or Pastoral livelihoods (15.3-18.6%) of Juba Region.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

FSNAU Post-Gu 2015 analysis indicates that most urban populations across Somalia were projected to face Minimal or Stressed acute food insecurity (IPC Phases 1 or 2) with the exception of urban areas in southern Somalia that have been affected by continued trade disruptions due to insurgent activities (Hudur and Wajid in Bakool Region and Buloburto in Hiran Region) which were projected to face acute food security Crisis (IPC Phase 3) through the end of the year.

The majority of the internally displaced population (IDPs) who live in the main IDP settlements have been classified as facing acute food security Crisis (IPC Phase 3), except IDPs in Dollow who are experiencing Emergency (IPC Phase 4) through the end of 2015.

Between July and September 2015, the cost of the Minimum Expenditure Basket (MEB) in local currency terms has shown a slight decrease (3-5%) in most South-Central regions, and moderate declines of 10 percent in Bakool and 14 percent in Middle Shabelle regions. MEB cost also declined (9- 27%) in most South-Central regions compared to one year ago (September 2014), with the highest decline (27%) recorded in Bakool.

MEB cost has also declined in regions that have urban populations categorized as Crises in post Gu 2015 (Bakool and Hiran) compared to July 2015, last year (September 2014) and the five-year average. On the other hand, the MEB cost remained stable in most Northern regions over the three month period since July 2015, despite increases at mild to moderate rates (3- 14%) compared to September 2014.

In July-September 2015, the purchasing power of the urban poor measured in terms of the terms of trade (TOT) between daily labour wage and cereal prices remained stable or slightly increased (1-5kg) in most South-Central regions, due to increased daily labour wages and a decline in the prices of cereals, consistent with improved market supply following the *Gu* seasonal/off-season harvest. In September 2015, the highest TOT was recorded in Bay (16kg) while the lowest was reported in Bakool (5kg). Compared to a year ago (September 2014), TOT increased slightly (2- 5kg/daily wage) in most South-Central regions [Figure 5].

In the urban areas of Bakool Region (Hudur and Wajid) that have been classified as facing acute food security Crisis (IPC Phase 3), TOT has increased by 1-2kg since July 2015, one year ago (September 2014) and is currently at par with the five-year average TOT. On the other hand, TOT declined by 1-3kg in Hiran Region (Bulobuurto) over the same period. In Jalalaqsi which has also been affected by recent trade disruptions due to insurgent activities, the impact is not yet reflected in market data monitored by FSNAU.

RURAL

Northern regions

In the most likely scenario, the food security projection for August to December 2015 for northern regions has been classified as Minimal (IPC Phase 1) for Hawd, West Golis and Northern Inland Pastoral (NIP) livelihoods; Stressed (IPC Phase 2) for Togdheer Agropastoral, Coastal Deeh and East Golis Pastoral; and Crisis (IPC Phase 3) in the drought affected Guban Pastoral and Northwest Agropastoral livelihoods.

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

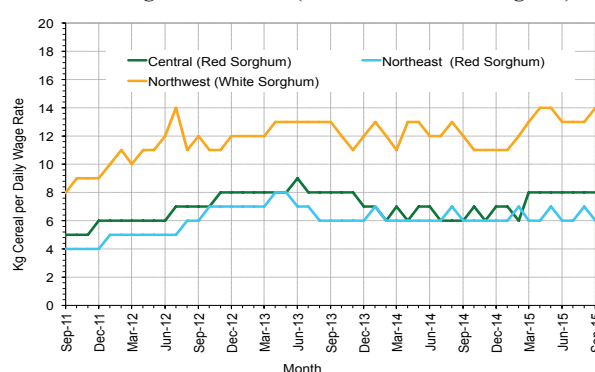
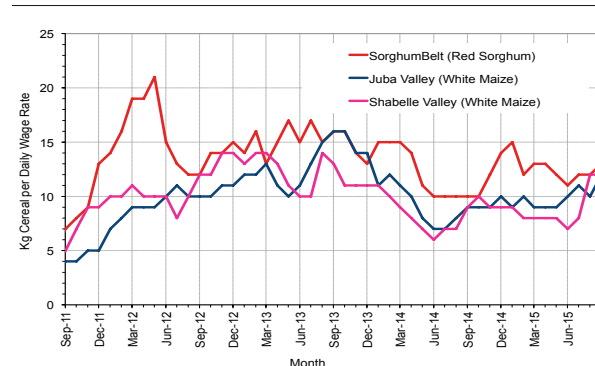


Figure 6: Trends in Terms of Trade between Daily Labour Wage and Cereals (Southern Regions)



Hagaa dry season (July-September 2015) was mild in most livelihoods of the Northwest and in parts of the Northeast due to average to near average *Gu* (April-June) rains which were followed by good *Karan* rains in the Northwest and start of light to moderate Deyr rains in parts of Northeast. As a result, pasture and water are near average to average in most livelihoods of the north, with the exception of parts of Hawd/East Golis in Togdheer, Northern Inland Pastoral (NIP) of Sanag and Bari and upper Coastal Deeh of Bari, where pasture/water are poor due to below average to poor *Gu* 2015 rains.

In the drought affected Guban Pastoral livelihoods (Awdal region) pasture/browse is very poor across the livelihood as a result of the failed uni-modal Hays rains (December 2014–February 2015). High livestock deaths have been reported in these areas and drought resistant tree species remain the only source of browse for the surviving camels and goats.

Early depletion of pasture with earlier than normal water trucking and consequent increase in water price have been reported in many areas affected by poor rainfall except Guban and upper Coastal Deeh that have permanent water sources (shallow wells and boreholes). Livestock deaths and goat abortions have been reported in most of the above-mentioned rainfall deficit areas. On the other hand, in Northwest agro pastoral, late *Karan* rains (August/September 2015) have improved rangeland conditions and led to cessation of water trucking that has been ongoing since July 2015.

Abnormal out-migration of livestock from Guban Pastoral and Northern Inland Pastoral livelihood of Bari Region to neighbouring areas with slightly better pasture/water has been reported in September 2015. Livestock body condition remained near average to average (PET score 3) in most livelihoods with the exception of rainfall deficit areas where it is below average. In particular, the body condition of lactating animals was poor to below average (PET score 1-2) due to insufficient pasture.

Milk availability for consumption and sales has declined seasonally across most of the pastoral livelihoods. In the drought affected areas, however, milk prices have increased as a result of lactating goat/sheep having stopped producing milk and reduced milk yield among lactating camels. Average to good performance of *Karan* rains is likely to result in improved sorghum yield for the upcoming *Gu/Karan* harvest expected in November. Despite being a secondary agricultural season for Togdheer Region, crop failure during the last 2015 *Gu* season fuelled early land preparation in Od-weyne district in anticipation of Deyr rains.

Terms of trade between the prices of local quality goat and rice remained stable or showed mild increase between July to September 2015 in most of the northern markets (average of 87kg in the Northeast and 69kg in the Northwest) due to stable/declining rice prices and a rise in the price of goat due to increased demand during the Hajj pilgrimage and Eid holiday periods. Compared to one year ago (September 2014) TOT increased slightly (2kg) in the Northeast but declined by 3kg in the Northwest.

The September 2015 TOT between local quality goat and sorghum also increased or showed a mild decline across northern regions both compared to July 2015 and one year ago (September 2014) due to a decline in sorghum prices. In September 2015, TOT was equivalent to 63kg of red sorghum/head in the Northeast and 93kg of white sorghum/head in the Northwest.

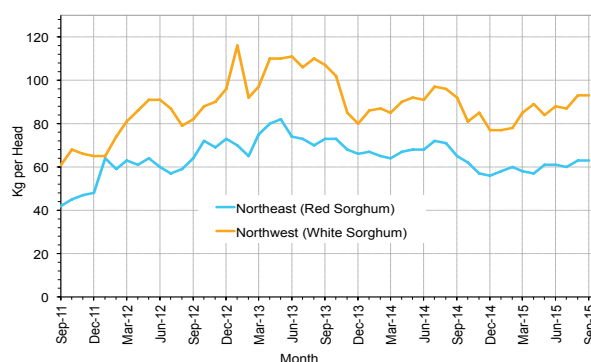
Central Regions

The food security projection for most rural livelihoods of Central Regions for the August-December 2015 has been classified as Stressed (IPC Phase 2) with the exception of Hawd Pastoral livelihood zone, Addun Pastoral livelihood zone of Mudug Region and Southern Inland Pastoral (SIP) of Galgadud Region that have been classified as Minimal (IPC Phase 1).



Average goat body condition- Northern Inland Pastoral (NIP) livelihood of Qardho, Bari Region, FSNAU, October 2015.

Figure 7: Trends in Terms of Trade Cereal to Goat (Northern Regions)



The *Hagaa* dry season (July-September 2015) was mild in most of the Central Regions as pasture and water availability was near normal to normal in most livelihoods. However, severe water shortage and poor pasture has been reported in areas that experienced poor rainfall during the *Gu* (April-June 2015) season, particularly parts of Addun and Hawd. In these areas, the severe water shortage triggered water trucking as early as July 2015. Consequently, livestock migration has intensified in the above areas. However, livestock migration in other areas remained normal and has been mostly confined to traditional dry season grazing areas.

Livestock body conditions currently are near average to average (PET score 3) in most livelihoods due to sufficient dry pasture in most livelihoods. However, the body condition of livestock, including that of lactating animals, in areas that have experienced water shortage are poor to below average (PET score 1-2).

FSNAU field reports indicate start of medium kidding/lambing for goats and sheep during September 2015 due to medium conception during the 2015 *Gu* season. However, milk availability and access are below average due to the low calving of camels during the 2015 *Gu* season and seasonal deterioration of rangeland conditions. As a result, milk prices have increased moderately between July and September 2015 (by 16%) and compared to a year ago (by 9%), but showed mild decline of compared to the five-year average (by 7%) in the main markets of Central regions.

Poor agropastoralists in the Cowpea-Belt agropastoral livelihood zone have already started to purchase food on credit during *Hagaa* due to poor cowpea production during the 2015 *Gu* season and depletion of household food stocks from their own production.

Terms of trade (TOT) between livestock and cereals (rice) remained stable or showed mild increase between July and September 2015 in most markets of Central Regions: by 2.3kg in Hawd/Addun and by 3.3 kg in other livelihoods. The improvement in TOT is attributable to increased price of local quality goat due to increased demand during the *Hajj* period and stable to mild decline of the price for red rice. Similarly, local quality goat to red sorghum TOT increased by 2.3 kg in Coastal *Deeh*/Cowpea Belt but remained stable in other livelihoods between July and September 2015. Annual comparison indicates a mild decline (by 1.1 kg) in the TOT across Central Regions mainly due to a moderate decrease in goat prices compare to one year ago (September 2014).

Southern Regions

In the post-*Gu* 2015 (August-December 2015), the food security situation in most rural livelihoods of southern regions is classified as Minimal (IPC Phase 1) or Stressed (IPC Phase 2) with the exception Riverine Gravity Irrigation livelihood zone of Middle Shabelle Region that has been categorized as facing acute food security Crisis (IPC Phase 3) through the end of 2015. The projections for IPC classification were based on the assumptions of average and above average *Deyr* 2015 rains, normal off-season crop harvest and *Deyr* farming activities, improved livestock production and cereal stock availability at household level in some of the farming areas.

Latest assessment results (October 2015), Results from these assessments indicate a total off-season crop harvest of 5 035 tonnes, which includes maize (64%), sesame (31%) and cowpea (5%) across four southern regions (Middle



Poor goat body condition- Addun livelihood of Hobyo, Mudug Region, FSNAU, September 2015.

Figure 8: Trends in Terms of Trade Goat to Cereal (Central Regions)

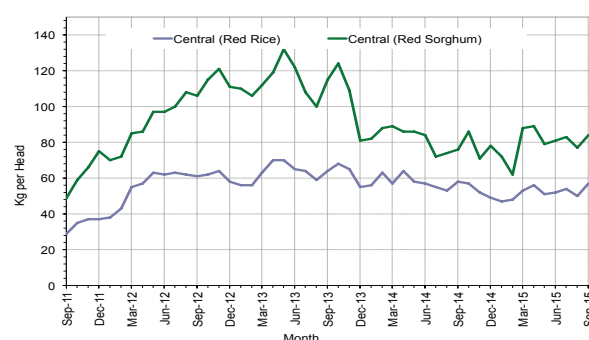
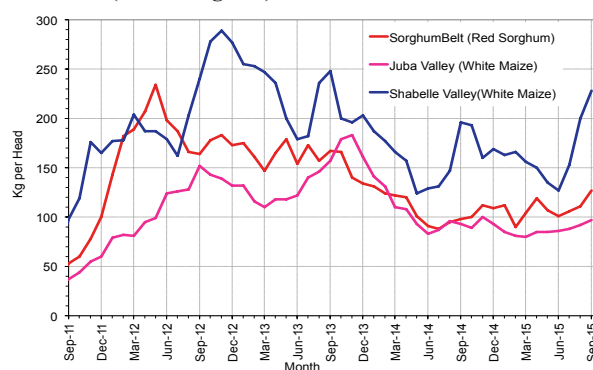


Figure 9: Trends in Terms of Trade Cereal to Labour (South Regions)



Shabelle, Gedo, Lower and Middle Juba). The off-season maize production is 17 percent lower than the projections made during the Gu 2015 assessment. This decline is mostly attributed to lower than expected harvest in Middle Shabelle and Lower Juba regions. This is despite higher than previously estimated off-season maize harvest in Middle Juba. Thus, the current cereal stocks among poor households of riverine livelihoods will last for about two months in Middle Shabelle, Middle and Lower Juba Regions (September-October). In the agropastoral livelihoods of Bay, Gedo and Lower Shabelle regions, cereal stocks are expected last for about three months and run out by November 2015. Hagga dry season was relatively mild as dry pasture and water for livestock were available in most livelihoods with the exception of Bay (Dinsor, Bay and Burhakaba districts), pockets of Lower Shabelle (southern rain-fed maize agropastoral areas) and Juba region which received Hagga showers in August and September 2015, thereby contributing to the improvement of pasture/browse availability as well as livestock body condition. In Hiran, reports indicate that livestock body condition has deteriorated seasonally as a result of prevailing hash dry conditions and increased water prices.



Poor crop harvested as fodder in Agropastoral areas of Beletwein, Hiran Region FSNAU 2015

Increased agricultural activities have created job opportunities for poor households in riverine and agropastoral areas of southern Somalia and this is likely to increase further in the coming months. As a result, the purchasing power of poor households measured through TOT between daily labor wage rate and cereal prices increased in September 2015 compared to July 2015 in Hiran (25%), Lower Shabelle (8%), Middle Juba (15%), Lower Juba (11%) and Bay (14%). TOT remained stable in Bakool and Gedo regions. Annual comparison of TOT showed an increase in most regions, with significant increase reported in Juba (33%) and Shabelle (33%) regions. TOT between the prices of local quality goat and cereals showed mixed trend in the Sorghum Belt regions between July and September 2015. TOT increased (29%) in Bay Region as a result of sustained livestock prices and decreased cereal prices.

TOT remained stable in Gedo Region but increased significantly in Hiran (32%) and Bakool (37) regions due to declining cereal prices (*see Agriculture Sector*). Similarly, TOT increased in Shabelle (49%) and Juba (7%) regions following seasonal trends. In September 2015, the lowest local quality goat to cereals TOT was reported in Gedo (85kg) and Lower Juba (88kg) regions, while the highest TOTs were reported in major cereal producing regions of Bay (275 kg) and Lower Shabelle (260kg). Compared to a year ago, TOT between local goat and locally produced cereals increased slightly in Shabelle (16%), Bay (11%) and Juba (2%), while TOT doubled in Bakool Region (100% increase) and more than doubled in Hiran Region (137% increase). However, TOT is expected to decline in these regions over the coming months due to anticipated decline of livestock demand in local and international markets when the Haj season concluded in late September 2015.

Recent publications and releases

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- *FSNAU Post Gu 2015 Food Security and Nutrition Technical Report, October 2015*
- *FSNAU Post Deyr 2014 Nutrition Technical Report, October 2015*
- *FSNAU Special Nutrition Update, September 2015*
- *FSNAU Climate Update, September 2015*
- *FSNAU Market Data Update, September 2015*

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

