

Food Security & Nutrition

Issued October 17, 2014

Quarterly Brief - Focus on *Hagaa* Dry Season Impact

KEY ISSUES

The Food Security and Nutrition Analysis unit (FSNAU) and partners reported that an estimated 1 025 000 people are in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) for the period of August-December 2014. A majority (62%) of the numbers of people in **Crisis** and **Emergency** represent Internally Displaced People (IDPs); the rest includes rural (27%) and urban (11%). Over 2.1 million additional people are classified as Stressed (IPC Phase 2). The July 2014 nutrition surveys revealed that an estimated 218 000 children under the age of five were acutely malnourished, of which 43 800 were severely malnourished facing high risk of morbidity and death. A majority of the acutely malnourished children (over 70%) are located in South-Central Region.

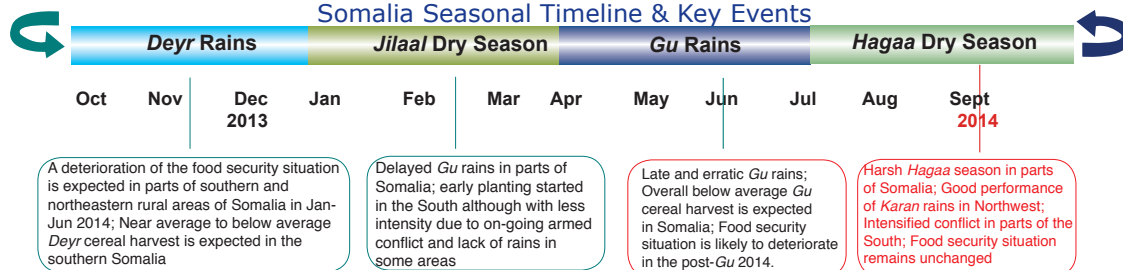
The FSNAU projected continued food security deterioration until the start of the *Deyr* rains in October, which is forecasted as average to above average in South-Central and average to below average in the North. Based on FSNAU's monthly monitoring and the results of recent rapid Hagaa dry season (July-September) assessment carried out in September 2014, the food security situation remains unchanged from earlier projections. Hagaa dry season was harsh in parts of the country where performance of recent *Gu* rains was poor. Among the affected areas are north Gedo, parts of Bakool, pastoral/ agropastoral livelihoods of Middle Juba and Hiran as well as parts of Central and Northeast (coastal of Bari region). Prevailing dry conditions in these areas have resulted in deteriorated rangeland conditions (pasture/water), worsening of livestock conditions and reduced milk production. On the other hand, early *Deyr* rains (mid-September) in parts of Bari region have alleviated severe water stress and ended expensive water trucking. The seven-day climate forecast suggests increased *Deyr* rainfall activity for the next seven days in South-Central, which will result in regeneration of pasture and improve water availability.

In September-October off-season harvest of crops (maize, sesame, cowpea) has been collected in parts of riverine livelihoods in the South (Middle Shabelle, Middle and Lower Juba and Gedo regions). Overall off-season maize harvest, which is estimated at 4 000 tonnes, is slightly lower (7%) than earlier projections made by the FSNAU. Preparation for *Deyr* planting has started in late September in most parts of the South. However, a military offensive carried out by Somalia's National Army and allied forces against the insurgent in the South, has adversely affected land preparation activities in parts of Lower and Middle Shabelle regions. Localised flooding in the riverine of Middle Shabelle has also affected some farmlands. In the agropastoral areas of Northwest, *Karan* rainfall performance has been good, which improved prospects of *Gu-Karan* harvest expected in November.

Despite overall below average *Gu* cereal harvest (65% of the *Gu* long-term average), the rapid increase in cereal prices over the last 12 months has started to slow down in most regions as locally produced cereals increased supplies to markets from recently collected harvest. However, cereal prices remained significantly higher than a year ago due to shortage of supply from local production and humanitarian assistance. In most southern regions, cereal stocks among the poor households have already been exhausted or will run out within the next one month. Civil insecurity is continuing to reduce movement of people and goods, including food commodities, impacting negatively on trade and income opportunities in most parts of the South. In Bakool and parts of Gedo, food prices (both local cereals and imported food) exhibit upward trend due to prevailing trade disruptions as access roads to parts of these regions remain under insurgent control. According to the United Nations High Commissioner for Refugees (UNHCR) data, 42 900 Somalis were displaced internally, mostly due to forced evictions and insecurity during July-September.

FSNAU will continue close monitoring of the food security situation across the country, including the performance of the *Deyr* rains and impact of recent conflict, and will provide periodic update of any significant changes.

Somalia Seasonal Timeline & Key Events



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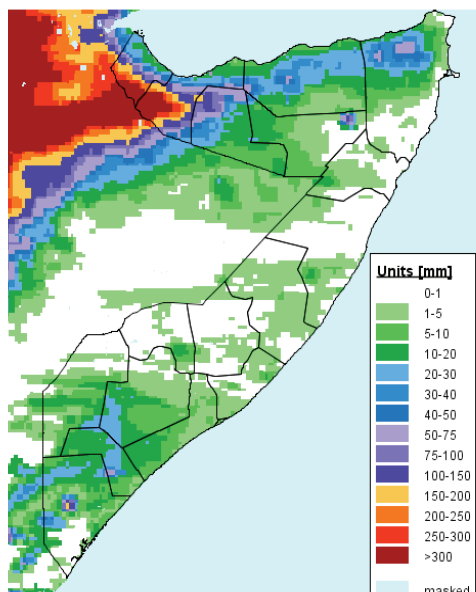
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SECTOR HIGHLIGHTS

CLIMATE

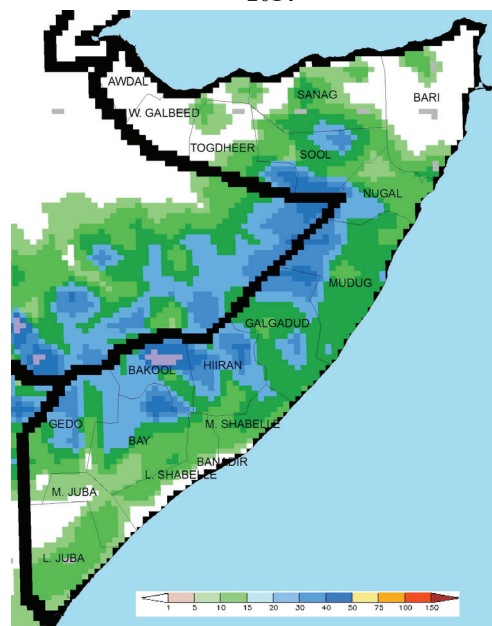
Map 1: July-September 2014 Cumulative Rainfall Estimates (RFE)



Generally, dry conditions prevailed in most parts of Somalia during the *Hagaa* dry season in (July-September) [Map 1]. The exceptions are parts of Northwest (West Golis Pastoral and Northwest Agropastoral livelihood zones) where average to good *Karan* rains precipitated during July-September. In the second dekad of September, light to moderate rains (early *Deyr*) were received in parts of East Golis and Karkaar-Dharoor of Bari and Hawd Pastoral of Nugal; Hawd and Nugal Valley Pastoral of Sool region; and East Golis of Sanag region. In the South, Coastal *Deeh* and adjacent agropastoral and riverine livelihoods of Lower Shabelle and Lower Juba regions received poor *Hagaa* rains between July and September. However, near normal *Hagaa* rains precipitated in Adale district (Middle Shabelle) and in southern parts of Bay. The *Hagaa* dry conditions ceased with the early start of moderate/good intensity *Deyr* rains in most parts of northern regions in the first week of October. The rains significantly supported rangeland rejuvenation, replenished most of *berkads*, water catchments and communal dams. However, dry weather prevails in the South-Central regions with only localised light to moderate showers reported in parts of Gedo and Bakool during late September 2014. The October 14-21 forecast from The National Oceanic and Atmospheric Administration (NOAA) indicates increase in rainfall intensity in most parts of central and southern regions and diminished rainfall activities in large parts of northern regions (Map 2).

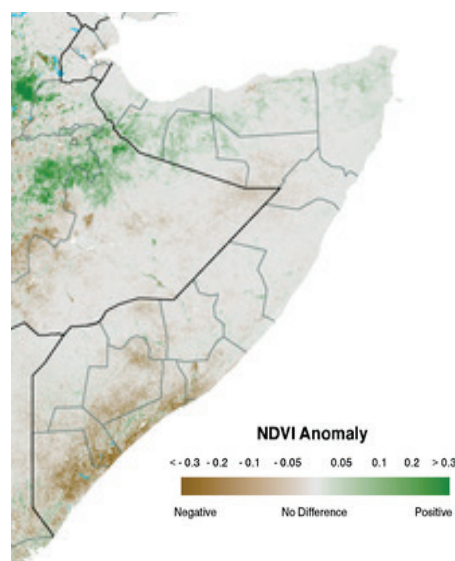
According to E-modis Normalised Difference Vegetation Index (NDVI) for the 2nd dekad of September (21-30c), the vegetation conditions in most of northern and central Somalia are close to normal to above normal (Map 3). However, most of the southern agricultural areas of Bay, Bakool, Juba, Middle and Lower Shabelle, as well as parts of Hiran and Gedo regions show below average vegetation

Map 2: One week RFE Forecast Valid to 21 October 2014



Source: NOAA

Map 3: September 21-30, 2014 eMODIS NDVI Anomaly, Short Term Mean (2001-2010)



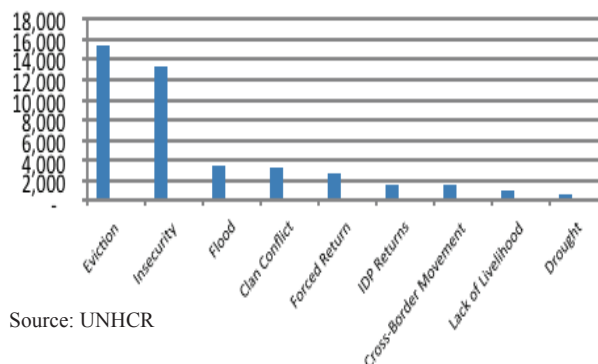
conditions compared to the short-term mean (STM) as a result of poor *Gu* and *Hagaa* rainfall performance as well as the start of *Deyr* planting season.

According to the 38th Forum of the Greater Horn of Africa Climate Outlook (25-26th of August 2014) for the coming *Deyr* season (October-December 2014), central and southern regions of Somalia, including Mudug, Galgadud, Hiran, Bakool, Bay, Gedo, Jubas and Shabelles are likely to receive near normal *Deyr* to above normal rains. However, in the North, there is an increased likelihood of near normal to below normal rainfall. The December-February *Hays* rains are projected as near average in Guban and East Golis livelihoods of northern regions.

CIVIL INSECURITY

In late August, Somali National Army (SNA) and African Union Mission in Somalia (AMISOM) forces started a second phase of the military offensive against Al-Shabaab militant groups across southern Somalia. The objective of the military offensive is to expand government control over major towns and other areas currently controlled by insurgents. In the first phase of the military offensive earlier this year government-aligned forces have liberated several towns in southern Somalia (Bay, Bakool, Hiraan, parts of the Middle and Lower Shabelle regions). In the period July-September, 42 900 Somalis fled their homes and were displaced within Somalia according to the UNHCR population movement data (<http://data.unhcr.org/horn-of-africa/country.php?id=197>). The main causes of these displacements included forced evictions (35%) and insecurity (31%). Evictions of the IDPs from the private and government-owned premises affected mostly the IDPs in Mogadishu and in the port-city of Kismayo (Figure 1). Displacements due to conflicts are likely to be temporary until the security situation in the conflict-affected areas becomes stable. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) for Somalia, about 1.5 million people currently live in areas, which could be directly affected by the military offensive (<http://www.unocha.org/somalia/reports-media/ocha-reports/humanitarian-bulletins>).

Figure 1: Monthly Population Displacements Countrywide (July-September 2014)



Source: UNHCR

Humanitarian access to the areas affected by the military offensive are hampered with airlifts often being the only way to get supplies to displaced people in need (<http://www.unocha.org/somalia/reports-media/ocha-reports/humanitarian-bulletins>). Trade disruption due to armed groups' blocking of main supply routes has exacerbated food security in urban areas. Particularly affected are Wajid and Hudur towns in Bakool region, and Bullo-Burte in Hiran region, which have been under siege by insurgents for several months. In addition, newly liberated towns of Garbaharey and Burdhubo of Gedo region have also been affected by trade disruptions created by insurgents, resulting in reduced access to food and non-food items by households in the affected towns. The insurgents continue blocking of all the roads leading to the towns of the above-mentioned districts and prevent movement of people and commercial goods. Since late August 2014, Tieglow district of Bakool region has also been affected by trade embargo from insurgents.

AGRICULTURE

In late September 2014, FSNAU undertook a rapid assessment to evaluate the *Hagaa* dry season impact on livelihoods of Somalia; and assess off-season crop harvest and *Deyr* planting activities (land tillage, sowing, irrigation, etc.) in southern regions. According to the assessment results, a total of 6 800 tonnes of off-season crops, including maize (3 950 tonnes), sesame (2 700 tonnes) and cowpea (150 tonnes) were harvested in four southern regions (Middle Shabelle, Gedo, Lower and Middle Juba regions) from late September to early October 2014. The off-season maize production is seven percent lower than the projections made during the *Gu* 2014 assessment (4 250 tonnes). This decline is mostly attributed to lower harvests in Lower Juba (by 29%) and Gedo (by 8%) regions due to erratic and insufficient *Gu* and *Hagaa* rains. Conversely, in Middle Juba, latest estimates show significantly higher (by 40%) off-season maize production (1 200 tonnes) compared to the previous projections (850 tonnes), which is attributable to higher crop yield per unit area achieved through intense use of pump irrigation facilities available in the region. Table 1 summarises estimates of the *Gu* 2014 off-season harvest in the above-mentioned regions.

Table 1: *Gu* 2014 Off-season Harvest

Regions	Estimated off-season harvest in post-Gu 2014			Actual production of off-season harvest		
	maize	sesame	cowpea	maize	sesame	cowpea
Lower Juba	2 400	3 200	0	1 700	2 500	0
Middle Juba	850	150	100	1 200	200	150
Gedo	800	0	0	750	0	0
Middle Shabelle	200	0	0	300	0	0
Total	4 250	3 350	100	3 950	2 700	150

In the Northwest, crop yield and overall *Gu-Karan* cereal harvest prospects have improved since the projections made during the *Gu* 2014 assessment, which is attributable to good performance of *Karan* rains (late July-September 2014). Updated harvest estimates will be available in December 2014 upon completion of the FSNAU/ government *Gu-Karan* crop assessment planned in November 2014.

According to field reports, *Deyr* 2014 seasonal agricultural activities began in late September in most of the South, the Cowpea Belt of Central and agropastoral livelihoods of Northwest. The main activities included land preparation, seed planting, ridging for rainwater harvest and early irrigations in riverine areas. However, farming activities have been constrained in parts of Lower Shabelle and Middle Shabelle by ongoing armed conflicts in Barawe, Sablale, Kurtunwarey and Adale districts. FSNAU field reports also indicate localised flooding in parts of Middle Shabelle (including farmlands) due to heavy rains in Ethiopia.

Increased farming activities have created job opportunities for poor households in southern regions. As a result, daily labor wage rates increased (4-14%) in September 2014 compared to the previous month in most regions of the South. The rates of increase were minor in the regions of Lower Shabelle, Gedo and Hiran due to continuous availability of labour opportunities for cash crop (banana, onions, etc.) farming activities.

Cereal availability has improved in most markets due to increased supplies from *Gu* 2014 and recent off-season harvests. As a result, between July and September 2014 maize prices have declined in the riverine markets of Shabelle (27%) and Juba (6%). In September 2014, the lowest maize prices (5 275-7 600 SoSh/kg) were recorded in the main cereal-producing districts of Lower Shabelle (Qoryoley and Marka), while the highest prices were noted in Hudur of Bakool region (15 800 SoSh/kg) and Dolow of Gedo (14 400 SoSh/kg). Notably, low prices in Qoryoley district, where the *Gu* 2014 harvest was very poor (see FSNAU Post-*Gu* Technical Series report, October 2014), is due to supplies from neighboring regions with good *Gu* harvest (Kurtunwarey district) as a result of ended trade blockage in the district.

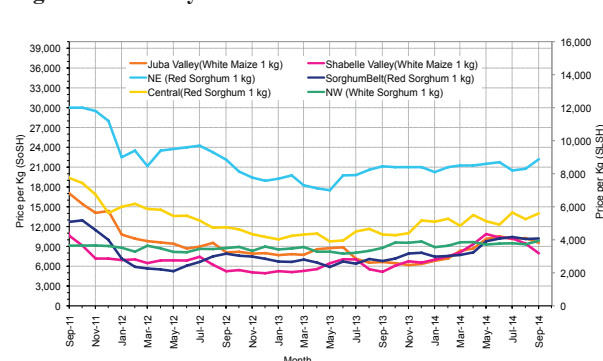
Sorghum prices decreased moderately Bay (19%) and Hiran (17%) in the third quarter of the year. However, the prices have increased in Bakool (4%) due to continued trade disruptions. Similarly, prices of sorghum increased slightly (2%) above their levels in July in Gedo region as a result of ongoing conflict. In the Northwest, sorghum prices have been mostly stable over the last three months in Awdal, W.Galbeed and Togdheer regions. In September 2014, the lowest retail price of sorghum was reported in Dinsor district (4 060 SoSh/kg) of Bay region, while the highest price were recorded in Adanyabal district of Middle Shabelle (22 000 SoSh/kg). The high prices in Adanyabal are due to limited local production and lack of humanitarian access.

Year-on-year comparisons show a significant increase in maize prices in the regions of Shabelle (32% in Middle Shabelle and 62% in Lower Shabelle) and Juba (90% in Middle Juba and 30% in Lower Juba) due to below normal *Gu* 2014 cereal production, high demand from cereal-deficit regions and reduced humanitarian interventions (Figure 2). Similarly, the price of sorghum has increased significantly over the past 12 months in the Sorghum Belt regions (Bay, Bakool, Gedo, Hiran). For example, in Bay region the price was 82 percent higher compared to the previous year (September 2013) due to significantly below average *Gu* 2014 harvest, increased demand from neighboring regions with below average/poor harvest and reduced humanitarian food assistance. Similarly, the sorghum prices have increased annually in Bakool (66%), Gedo (38%) and Hiran (7%). White sorghum price have shown an annual increase (by 16%) in the cereal-producing districts of Northwest.



Off-season harvest. Bardera District, Gedo Region, FSNAU, September 2014

Figure 2: Monthly Trends in Local Cereal Prices



LIVESTOCK

During *Hagaa* dry season, pasture/browse and water conditions were mixed in agropastoral and pastoral livelihoods of the country. In the Northwest, water and pasture remained average in most livelihoods due to near average *Gu* rains and good *Karan* (July-September) rains. The exceptions are parts of Hawd (Togdheer/ Lasanod districts), Gebi valley/ Sool Plateau (Sanaag region) and Nugaal Valley (Sool region), where pasture and water deteriorated to below average/ poor conditions due to below average *Gu* rains and delayed *Deyr* rains. In the Northeast and Central, the *Hagaa* dry season was harsh due to poor *Gu* rains and delayed *Deyr* rains, which resulted in deteriorated pasture/browse and water resources to below average/ poor conditions in most livelihoods. The exceptions are East Golis and Karkaar livelihoods in the Northeast where early *Deyr* rains that commenced in early September 2014 have slightly improved rangeland conditions alleviated water shortages and ended water trucking that has been going on since July. In southern regions, pasture/water conditions are poor in parts of Hiran (agropastoral livelihood), northern Gedo (Dawa and Southern Agropastoral livelihoods), Bakool (Southern Inland Pastoral [SIP] and parts of Bakool Agropastoral livelihoods), Middle Juba (Southern Agropastoral livelihood), large parts of Middle Shabelle, Coastal *Deeh* of Lower Shabelle and parts of Lower Juba (Southeast Pastoral [SEP] and SIP livelihoods). Extreme water shortage, water trucking for cattle, livestock hand-feeding and cases of death of small ruminants have been reported in parts of Hiran, Bakool, Lower Shabelle and north Gedo. For instance, between July-September 2014, the price of 20 litre jerrycan of water increased by 28, 31 and 20 percent in rural markets of Gedo, Bakool and Lower Shabelle respectively.

During *Hagaa* dry season, typical livestock migration within dry land grazing areas has been going on in most parts of the country. Livestock body condition is mostly average to below average in the country (Pictorial Evaluation Tool [PET] scores of 2-3 on a 1-5 scale). In particular, average livestock conditions (PET score of 3) are reported in most of the Northwest and parts of the South. However, in the rain-deficit livelihoods (see above) livestock conditions are below average to poor (PET score 1-2) due to the lack of pasture. Milk production is average to below average in most livelihoods apart from the rain-deficit areas where it is poor. Between July-September 2014, milk prices (fresh camel) showed mixed trend across the country. Milk prices remained relatively stable or declined moderately in most of the northern regions, with the exception of rain-deficit areas (Sool, Togdheer, Nugal regions and border town of Wajale), where price rose moderately (10-21%). In central and parts of southern regions (Juba, Gedo and Lower Shabelle), the price of camel milk declined (3-15%) but it has (4-12%) increased in other rain-deficit areas in the South over the last three months. The highest milk price increase was recorded in Bay (51%) due to high demand and less supply to the markets because of prevailing insecurity.

Local quality goat price showed mild changes over the last three months (July-September 2014) in most regions (Figure 3). In the markets of Northeast, Northwest and Central regions, local quality goat price has either remained stable or increased marginally, while increasing moderately (9-17%) in most of the southern markets in the last three months. Annual comparisons indicate marginal to moderate declines in values of livestock (local quality goat) in Northwest, Northeast, Central, Sorghum Belt and Juba regions, and moderate increase (22%) in Shabelle regions. Local quality cattle price increased at mild to moderate rates in Juba (4%), Shabelle (8%) and Northwest (14%), but showed a mild decline in the Sorghum Belt regions (6%) between July and September 2014. Annual comparison indicates marginal declines (of less than 5%) markets in the North

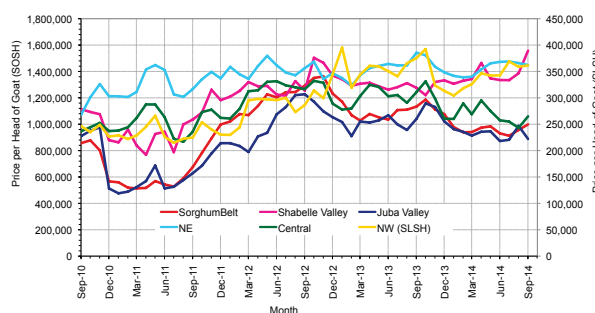
MARKETS AND TRADE

From July to September 2014, the Somali shilling (SoSh) depreciated slightly against the U.S. dollar (USD) in the main markets of southern Somalia. At the end of September 2014, Banadir regional markets quoted the SoSh at 20 846 per U.S.D, a slight depreciation from the July 2014 level of 20 487 per USD. This is attributed to increased demand for the dollar during the *Hajj* season (in relation to travels to Mecca). The rates were stable in the markets of Central and Northeast. Compared to a year ago (September 2013), the Somali shilling was stable across the SoSh-using areas (South,



Good pasture in Agropastoral. Gabiley District, W Galbeed Region, FSNAU, September 2014

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



Central and Northeast). The Somaliland shilling (SlSh) remained stable in the third quarter of the year across the main markets of Northwest but depreciated slightly over the past year.

In July–September 2014, prices of food items (both locally produced cereals and imported food commodities such as rice, sugar, wheat flour, vegetable oil, etc.) were generally stable or declined modestly in most parts of the country. This trend is also applicable to parts of Lower Shabelle region where trade blockade by insurgents has recently been lifted. For example, in Bay and Lower Shabelle regions, prices of red sorghum and white maize have decreased by 19 percent on average for each respective region as the *Gu* harvest entered markets. However, September sorghum and maize prices in these markets are significantly higher (82% and 62% respectively) when compared to September last year. This trend is attributable to lower *Gu* 2014 cereal (sorghum and maize) harvest compared to *Gu* 2013 and reduced humanitarian assistance.

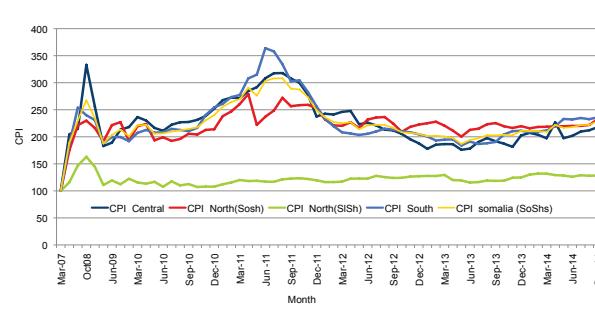
The average prices of imported commodity items show stable trends in the last three months as well as over the past year on account of stable/declining prices on the export markets and relatively stable exchange rates. Price movements for most commodities have followed international price trends. However, in Bakool region prices of food items continued an upward trend due to conflict-related trade disruption.

Cross-border trade between Somalia and neighbouring Kenya and Ethiopia has increased over the last three months. Imports of sorghum and maize from Ethiopia to Somalia have amounted to 1 519 tonnes, which is 132 percent higher than the same period last year. This trend is attributable to decreased cereal availability in Somalia. In addition, cross-border livestock imports from Ethiopia have gradually increased since June this year for re-exports to Arab countries during the recently concluded *Hajj* season in October. Re-exports of rice, sugar and wheat flour from Somalia to Ethiopia and Kenya have also increased by nearly 50 percent over this period due to relatively higher prices in Kenya and Ethiopia.

The **Consumer Price Index (CPI)** has elevated slightly (6%) in the Northeast in the third quarter of the year due to a seasonal peak in the price of sorghum, a key commodity in the basket (Figure 4). The CPI remained relatively stable in other zones of the country. However, over the past one year the average cost of the basket has risen in South (24%), Central (14%) and Northwest (8%), mostly as a result of by increased local cereal prices in the context of reduced production and humanitarian assistance. The CPI has been relatively stable in the Northeast region over the past year.

Cereal prices are likely to increase in October as stocks from the recent *Gu* harvest dwindle, while farmers typically retain some stocks for own consumption during the lean period of October–December. In addition, due to below average sorghum and maize production, prices are anticipated to remain high and even increase from November. However, in the Northwest, favourable prospects for *Gu-Karan* cereal production in November (see Agriculture sector), could help bring down high cereal prices in the north. Price of essential imported commodities (rice, sugar, wheat flour, vegetable oil and diesel) is expected to be stable or decline modestly through at least December as supplies from source markets remain positive.

Figure 4: Monthly Trends in Consumer Price Index



INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In the post-*Gu* 2014 (August – December 2014), FSNAU/ partners have estimated 846 000 urban people in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4). Lower Shabelle (Qoryoley district) and Middle Juba were identified in **Crisis** (IPC Phase 3); while Hiran (Bulo-Burte district) and Bakool (Wajid & Hudur districts) regions were classified in **Emergency** (IPC Phase 4). All the other regions were categorised as **Stressed** (IPC Phase 2) apart from Sanaag, W. Galbeed and Awdal that were classified as **Minimal** (IPC Phase 1). All major IDP settlements were identified in **Crisis** (IPC Phase 3) with an estimated 635 000 people in this phase during August-December 2014.

The FSNAU monitors trends in major indicators that determine food security situation in urban areas in Somalia. These include cost of living, measured through the cost of Minimum Expenditure Basket (MEB); purchasing power measured through terms of trade between labour and cereals; security conditions, which affect economic activities and humanitarian access and often causes population displacement.

In the last three months (July-September, 2014), the MEB cost (in local currency terms) has been relatively stable in most regions of the country but increased moderately (6-8%) in Bari, Sool and Sanag. The highest cost (in USD terms) of the MEB in September 2014 was registered in Sanaag (~225 USD), while the lowest was in Bay (88 USD). Compared to the same month last year (September, 2013), the MEB cost increased significantly (15-45%) in most regions of South-Central with the highest increase (45%) recorded in Bakool. The MEB cost has also increased at mild to moderate rates (4-14%) in most northern regions over the past one year.

In July-September 2014, the ToT between casual labor wage and most commonly consumed cereals increased (1-3 kgs of cereals per daily wage) in most southern regions. The ToT increase was driven by increased labour wage opportunities and decline in cereal prices in most regions, following the *Gu* seasonal harvest. In September 2014, the highest ToT was recorded in Bay and Gedo (14kg/ wage) while the lowest was in Bakool (3kg/ wage). Compared to a year ago (September 2013), the ToT fell in most regions; particularly large drops were observed in Middle Juba (17 kgs) and Bay (8 kgs) mainly due to escalated cereal prices (see Agriculture Section) [Figures 5 and 6].

In the regions that are categorised in **Crisis** (IPC Phase 3) and **Emergency** (IPC Phase 4) in the post-*Gu* 2014, the ToTs (labour wage to cereal) increased by 1-3kg but were lower compared to the levels a year ago (September 2013) and to their respective September five-year average levels. The cost of MEB remained stable in most of these regions in the last three months, but increased compared to September last year. Restricted trade and economic activities continue to persist in urban areas of Bakool and Hiran since March 2014. Urban areas of Garbaharey and Burdubo districts of Gedo region and Tieglow of Bakool region that have been recently liberated by the government forces and AMISOM (see Civil Insecurity article), have also been experiencing trade disruptions caused by the insurgents. FSNAU will continue close monitoring of food security situation in these districts.

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

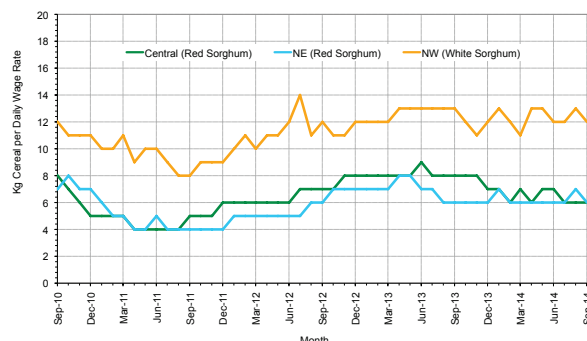
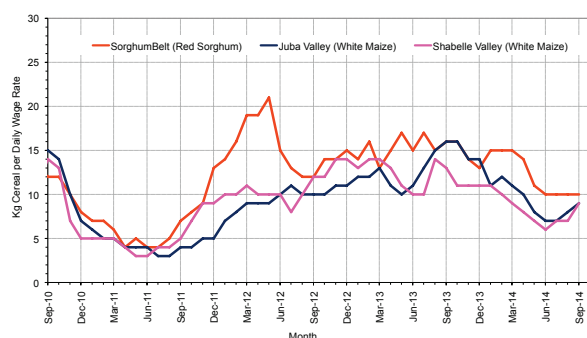


Figure 6: Regional Trend in Terms of Trade between Daily Labour Wage and Cereals (South)



Northern regions

The food security situation has remained stable since the post-*Deyr* 2013/14 season in most pastoral livelihoods of Northern regions, but slightly deteriorated in the agropastoral livelihood. In August-December 2014, most livelihoods of the region were classified as **Stressed** (IPC Phase 2) with the exception of the parts of the Coastal *Deeh* classified in **Crisis** (IPC Phase 3). *Hagaa* dry season (July-September 2014) was mild in most livelihoods of the Northwest and in parts of the Northeast due to near average *Gu* rains, good *Karan* rains in the Northwest and early start of *Deyr* rains in parts of Bari region (*East Golis* and *Karkaar* livelihoods). Therefore, pasture and water are near average to average in most livelihoods. The exceptions are parts of Hawd (Togdheer/ Lasanod districts), Gebi Valley/ Sool Plateau (Sanaag region), Nugaal Valley (Sool region) and parts of Sool Plateau and Coastal *Deeh* of Northeast where pasture and water deteriorated to below average/ poor conditions due to below average *Gu* rains and delayed *Deyr* rains. Opportunistic livestock migration from rain deficit areas (see above) to neighbouring areas with better pasture/ water has been reported over the last two months (August-September 2014). Livestock body condition remains average (PET score 3) in most livelihoods with the exception of rain deficit areas where it has deteriorated to below average (PET score 2). Milk production is average to below average in most livelihoods apart from the rain-deficit areas where it is low.

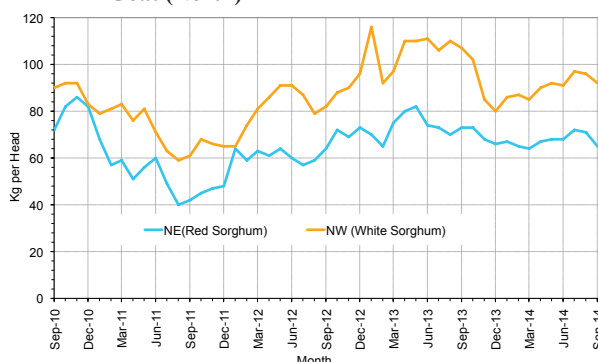
Good performance of *Karan* rains is likely to result in improved sorghum and maize yield for the coming *Gu/Karan* harvest compared to the earlier projections made by FSNAU. The *Gu/Karan* crop assessment will be carried out in the second dekad of November 2014. In Togdheer region, early *Deyr* rains received in the Golis Mountains have caused beneficial flash floods in the lowland areas in the second dekad of September, which is expected to improve natural grass fodder conditions.

Terms of trade between goat and rice remained stable over the last three months in most of the northern markets (average of 85kg/head in the Northeast and 71kg/head in the Northwest) due to stable prices for both commodities (Figure 7). Yearly comparison of the ToT indicates stable rates in the Northeast and moderate decline (8%) [from 77 to 71 kg/head] in the Northwest. Conversely, ToT goat/sorghum declined across the northern regions during both comparison periods due to increased sorghum (red/white) price. In September 2014, the ToT was equivalent to 65kg of red sorghum /head in the Northeast and 92kg of white sorghum /head in the Northwest.

Central Regions

The food security situation has slightly deteriorated in central regions in the post-*Gu* 2014 when compared to the post-*Deyr* 2013/14 mostly due to poor performance of *Gu* 2014 rains. In August-December 2014, **Crisis** (IPC Phase 3) situation prevail in the Coastal *Deeh*, while other livelihoods of the region remain **Stressed** (IPC Phase 2) as in the post-*Deyr* 2013/14. The *Hagaa* dry season (July-September 2014) was harsh in most parts of central regions as pasture and water availability has deteriorated to below average/ poor conditions across the livelihoods. Severe water shortages in *berkad*-dependent livelihoods of Hawd, Addun and parts of Cowpea Belt and Coastal *Deeh* have triggered water trucking in July 2014. Consequently, livestock migration has intensified although mostly remained within the traditional dry season grazing areas.

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

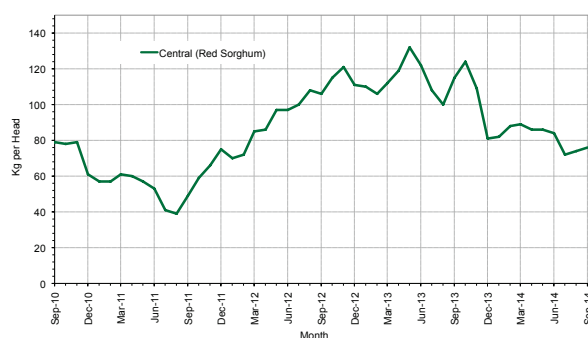


Improved pasture and water. East Golis, Qandala District, Bari Region, FSNAU, September 2014

Livestock body conditions currently are below average to poor in most livelihoods (PET score 2-1) due to insufficient pasture. FSNAU field reports indicate low kidding/ lambing of goats and sheep in September 2014 due to low conception during *Gu* season. This resulted in low milk availability for consumption at household level. Milk yield of lactating camel has also declined seasonally due to deteriorated rangeland conditions. Nevertheless, milk prices have declined moderately (9%) between July and September in main markets as lactating camels are congregated at water points in the main towns due to water shortages in pastoral areas. Poor agropastoralists resorted to purchases of food on credit during *Hagaa* due to poor cowpea production and lack of cereal stocks.

Terms of trade between livestock and cereals (rice) remained stable or increased slightly in the last three months (July-September 2014) in most markets of central regions (Figure 8). For instance, in September 2014, the ToT goat/rice increased (10%) to 57kg/head in Hawd/Addun and remained stable at 61 kg/head in other livelihoods compared July 2014. The ToT improvement is attributable to recent local quality goat price increase due to *Hajj* demand and stable to slightly declined red rice price. Similarly, ToT goat/red sorghum increased (22%) to 104kg/head in Coastal *Deeh*/Cowpea Belt and remained stable at 70kg/head in other livelihoods in the same comparison periods. Annual comparison indicates decline (9%) in the ToT goat/rice across the markets of Central, mainly due to lower goat price.

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



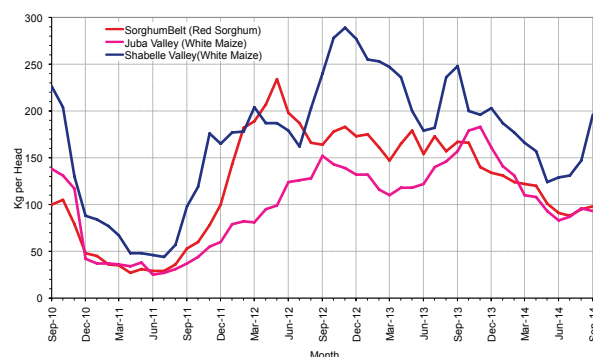
Poor body condition of lactating camel. Hawd Pastoral, Central Regions, FSNAU, September 2014

Southern Regions

In the post-*Gu* 2014 (August-December 2014), the food security situation in most rural livelihoods of southern regions was classified as **Stressed** (IPC Phase 2) with the exception of Southern Agropastoral of Middle Juba, which was categorized as **Crisis** (IPC Phase 3) and Southern Inland Pastoral of Lower Juba categorized as Minimal (IPC Phase 1). The forecast was based on the assumptions of average/ above average *Deyr* rains, normal off-season crop harvest and *Deyr* farming activities, improved livestock production during short-rainy season and cereal stock availability at household level in some of the agricultural areas.

Based on the latest assessment results (September 2014), poor *Hagaa* rains (July–September 2014) and dry weather have contributed to contraction of off-season crop harvests in the riverine areas and to deterioration of pasture conditions in grazing lands. The off-season crop estimates indicate lower output of maize in Lower Juba and Gedo regions compared to earlier projections made in July 2014. In Lower Juba, *Gu* 2014 maize harvest (including off-season) is estimated at 53 percent of the long-term average [LTA] (1995-2013), while in Gedo the harvest (*Gu* plus off-season) is slightly above (by 3%) the LTA. Currently, cereal stocks among poor households are available up to the end of the year in riverine livelihoods of Shabelle and Gedo regions, while it will last for about two months in riverine of Middle and Lower Juba regions. In Agropastoral livelihoods of Bay, Gedo and Lower Shabelle regions, cereal stocks among poor households are expected to run out by November 2014, while in Middle Juba and Middle Shabelle the stocks are expected to last till the end of October.

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



Rangeland conditions have deteriorated during the *Hagaa* dry season (July-September) in agropastoral and pastoral areas of Hiran (northeastern parts of Beletweyne – SIP and Hawd livelihoods), north Gedo (Dolow, Garbaharey, Luuq) and Bakool regions. Significant water shortages were also reported in some of the above mentioned livelihoods, particularly in the pastoral areas of north Gedo region. This situation led to increased livestock outmigration and worsening of livestock body conditions, thereby elevating their susceptibility to diseases. However, *Deyr* rains that are expected to intensify in southern regions in October, will enhance pasture condition, replenish water catchments and contribute to improved livestock body condition.

In other southern regions, the dry season was relatively mild as pasture and water were available in most livelihoods of Bay, Middle Juba, Lower and Middle Shabelle (with the exception of Coastal *Deeh* areas) and some pockets of Juba regions. Normal livestock body condition (PET score 3-4) was reported across these regions. Also, unusual *Hagaa* rains in Bay have contributed to improved pasture and water conditions where milk availability is near average to average as a result of average cattle calving occurring since August.

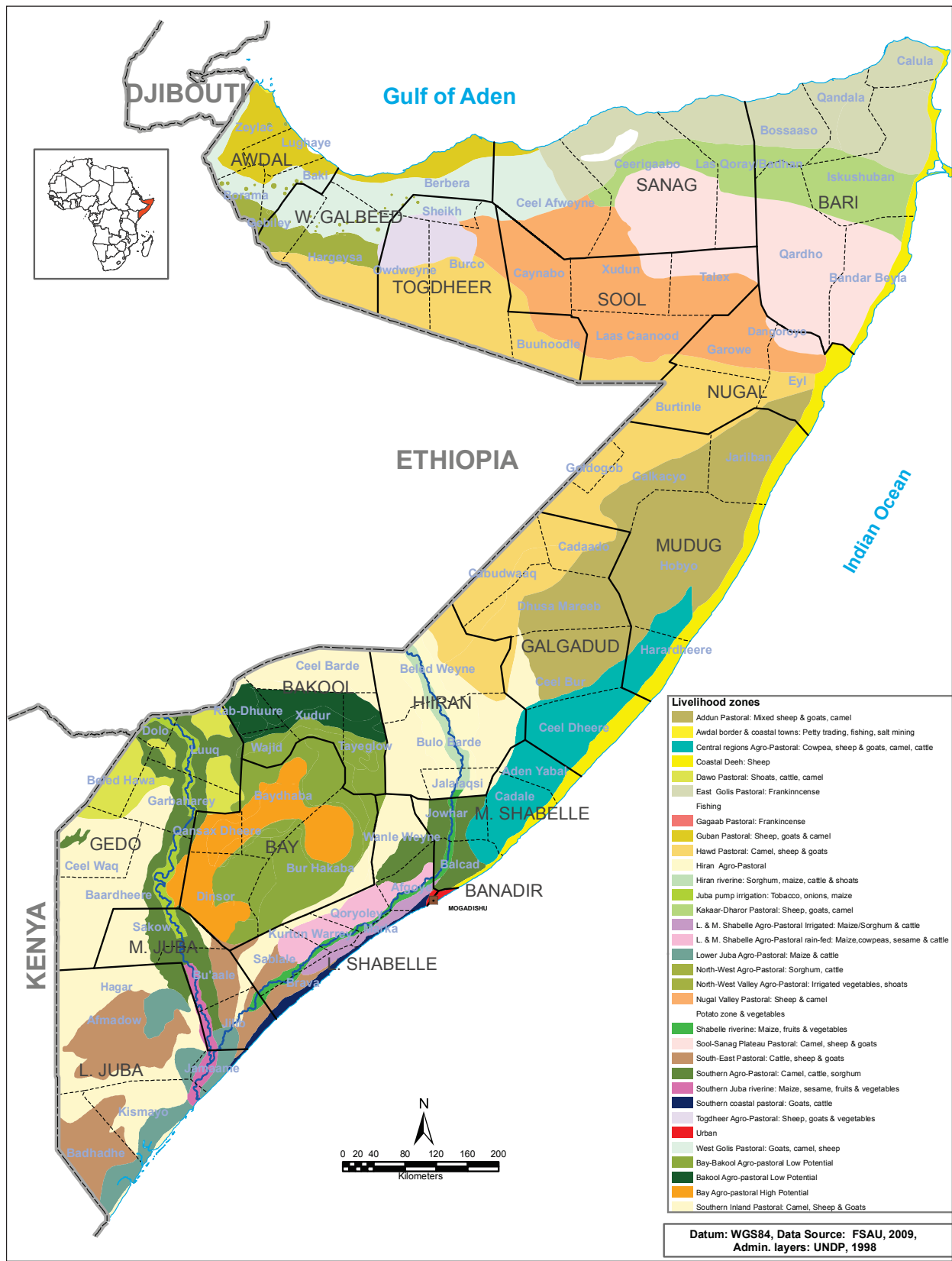
Over the last two months (August-September), agriculture labour wages increased in riverine areas of southern Gedo, Lower Shabelle and Juba regions due to increased demand for *Deyr* planting. However, ongoing conflicts and violence in parts of Lower Shabelle (Barawe, Sablale, Kurtunwarey), Middle Shabelle (Cadale and northern part of Jowhar) and parts of Juba regions (Bulogudud) have caused temporary population displacement, which may affect *Deyr* farming activities in these areas.

ToT between agriculture labour and cereals in rural livelihoods during last two months (August & September) indicated mixed trends: the ToT increased in Hiran (25%), Shabelle valley (29%), Gedo (17%) and Juba valley (13%); decreased in Bakool (-25%) and remained stable in Bay. The highest ToT (14kg) were recorded in Bay and Gedo regions, while the lowest was in Bakool (3kg) [Figure 9].



Land preparation for Deyr 2014. Afgoye District, Lower Shabelle Region, FSNAU, September 2014

SOMALIA LIVELIHOODS ZONE MAP



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