

Food Security & Nutrition

Quarterly Brief - Focus on Post *Deyr* 11/12 Season Early Warning

KEY FINDINGS

The preliminary analysis of the post-*Deyr* food security situation in Somalia is based on the early indication of the outcome of the *Deyr* season performance, humanitarian accessibility and international price trends. The current analysis indicates that the large scale severe crisis will sustain in most parts of southern Somalia given recent restrictions on humanitarian interventions despite the overall favourable *Deyr* season performance. Although the current outlook for crop and livestock performance is rather positive, the role of humanitarian assistance is paramount in the food-deficit country like Somalia, which produces only slightly above 40 percent of its domestic cereal requirement. Further, of great concern, is the availability of basic services such as health nutrition and water, which are likely to be significantly affected with recent restrictions on humanitarian access and could undermine the gains made in these sectors in recent months.

Southern Regions Cereal Production:

- Given the *Deyr* provides only 30-40 percent of the annual cereal production of Somalia, poor and very poor farmers in the South are unlikely to have enough food till the next harvest. Recent restriction to access in southern Somalia for humanitarian agencies, hence likely reduction in the delivery of assistance into the area will exacerbate the situation. Thus, large numbers of poor and very poor population in the South, particularly in farming livelihoods, will remain in crisis. However, a portion of the population representing middle wealth group may see some improvements in their food security status. Of particular concern are Juba regions, where the food security situation will continue to deteriorate through March in most livelihoods, given the prevailing insecurity and crop damage due to the floods (flash and river). However, in March they will benefit from a late harvest.
- The preliminary indication of *Deyr* 2011/12 harvest points towards normal crop production in most crop-producing areas of southern and central Somalia due to good and evenly distributed rainfall as well as average planted area. In contrast, poor *Deyr* crop production is expected in the riverine of Juba and Gedo regions due to the significant damage to standing crops as a result of the floods, which have also prevented *Deyr* season cultivation in inundated areas. However, these regions will benefit from off-season production in depression areas (*desheks*) by March-April 2012. At the same time, in most regions of southern Somalia, the *Deyr* crop harvest will be carried out in stages, between January and March 2011, as planting has extended up to the end of November due to continuous heavy rains. According to the current *Deyr* production outlook, the major producing regions of Lower Shabelle and Bay will likely have sufficient cereal stocks at least up to the start of the *Gu* 2012 harvest. The prospects with stock availability are also good in Middle Shabelle, Hiran, Bakool and agropastoral of Gedo as well as in parts of Juba. However, in the flood affected areas of Juba and Gedo riverine stocks will be very limited in the *coming* three months.

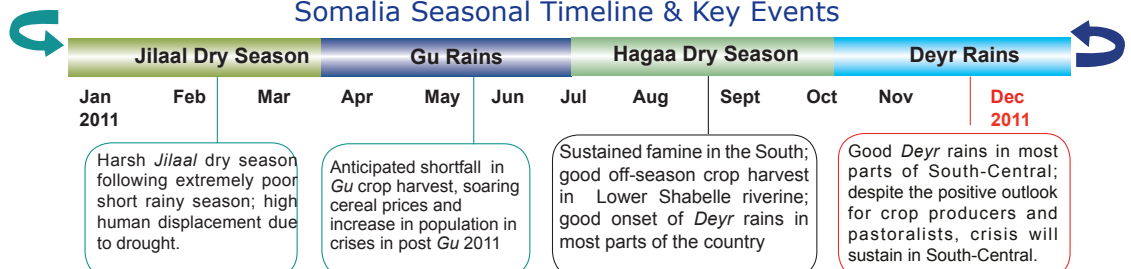
Southern Regions Cereal Prices

- Since June 2011, local cereal prices have declined considerably across southern Somalia as a result of increased supplies from humanitarian interventions as well as limited local production (*Gu* and off-season). The declines in cereal prices combined with an increase in labour wages given high demand for intense farming activities (Sep-Dec) improved purchasing power of the poor in southern and central Somalia. However, the purchasing power is still very weak compared to the same time last year in Juba regions largely due to hindered economic activities attributable to prevailing insecurity in the area. The positive impact of the favourable *Deyr* crop harvest on local cereal prices is likely to be compromised by imminently shrinking humanitarian space and interruptions to commodity movements in South-Central given deteriorating security situation. The food price dynamics in Somalia will also be determined by fuel prices on international markets, which are forecasted to be volatile.

Central and Northern Regions

- Most parts of central and northern regions of the country will benefit from the positive effects of the *Deyr* rains on livestock and crops as well as free humanitarian access. However, the rain-deficit livelihoods of Bari and Sanaag regions, as well as Nugal Valley of Sool region will remain in crisis. The crisis will also sustain in coastal areas of Central where livestock asset holding is very limited due to previous successive seasons of rain failure, while the livelihood hosts a large number of pastoral destitute. In northwestern regions the recent crop assessment (Oct-Nov) estimates of 68,000MT of cereal production following good *Karan* rains (Aug-Oct), ranks it as a 2nd highest since 1998.

Somalia Seasonal Timeline & Key Events



Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

Integrated
Food Security
Analysis

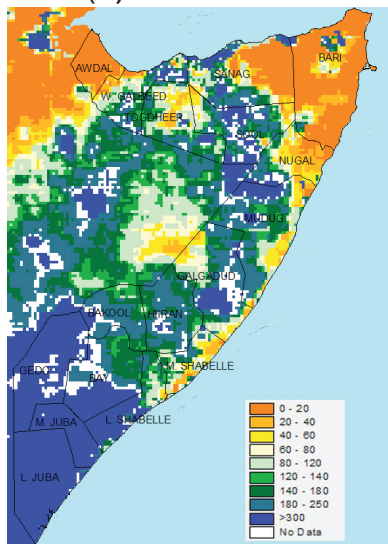
FSNAU - Somalia

United Nations Somalia,
Ngecha Road Campus
Box 1230, Village Market,
Nairobi, Kenya
Tel: +254-20-4000500
Cell: +254-722-202146
/ 733-616881
Fax: +254-20-4000555
Email: info@fsnau.org
Website: www.fsnau.org

SECTOR HIGHLIGHTS

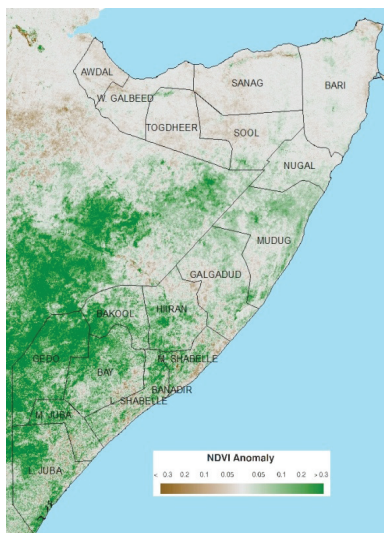
CLIMATE

Map 1: NOAA RFE Percent of Normal (%)
1 Oct -10 Dec 2011



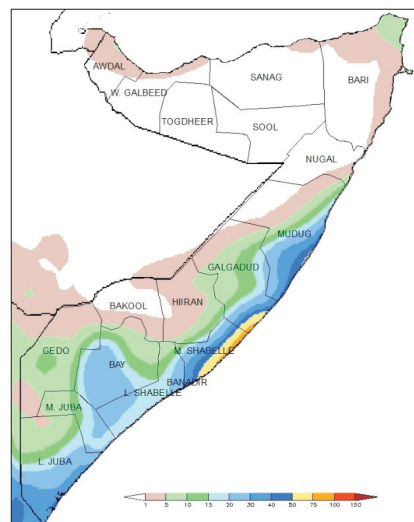
Source: NOAA

Map 2: E-Modis NDVI Anomaly
Dec 1-11, 2011



Source: JRC/MARS FOOD

Map 3: NOAA 7 day precipitation
forecast valid up to Dec. 19th, 2011



Source: NOAA

The overall *Deyr* 2011/12 season rainfall performance was mixed in terms of the amount, coverage, temporal and spatial distribution across Somalia. The rains were normal to above normal in South-Central and parts of the North but below normal in most areas in the Northeast and parts of Togdheer region in the Northwest. The excessive rainfall led to flash and river floods in most regions of southern Somalia, impacting more severely Juba and Gedo regions (see the callout-box on pg. 3). The Normalized Difference Vegetation Index (NDVI) for the first dekad of December depicts good vegetation conditions in most parts of South-Central with some decreases from normal in flood affected areas. The short-term outlook indicates a decrease in precipitation in most parts of the South, with moderate rainfall predicted in coastal areas of Middle Shabelle and Galgaduud regions.

- In October–December 2011, above 300 percent of the Long-Term Mean (LTM)¹ rainfall was received in the regions of Gedo, Lower Juba and Middle Juba and large areas in L. Shabelle and Bay. The rains were also above normal, in the range of 140 to 180 percent of LTM, in most parts of Bakool and Hiran, as well as some areas in Bay and Middle Shabelle (Map 1). The above normal rains in the South led to flash and river floods in Juba valley and Gedo region as well as localized areas of Bay and Shabelle regions. Poor rainfall was received in coastal areas of Middle Shabelle and Hawd of Hiran.
- In the North, the *Deyr* rains started in mid-October. However, as the season advanced the rains became light to moderate, inconsistent, localized and ended earlier than expected in November. Less than 40 percent of normal *Deyr* rainfall was received in the entire Bari region, larger part of Sanaag, Nugaal Valley of Sool region and some parts of Togdheer. Most areas of the central regions received normal to above normal rains, except the Hawd Pastoral of Dhusmareb (Galgaduud), where the short rains were below normal.
- The E-Modis satellite derived NDVI anomaly indicates normal to above normal vegetation in most parts of South-Central. However, the satellite image depicts slight deterioration of biomass in the North, which is due to a long dry spell in November. Below normal vegetation conditions are evident in isolated pockets of Bay, Shabelle and Juba regions, which could be attributable to inundation of crop fields by the floods (Map 2).
- The seven-day weather forecast (valid up to Dec. 19) by the North Oceanic Atlantic Administration (NOAA) indicates light rains in the inlands of Juba, Shabelle, Gedo and Bay regions. The same source predicts light to moderate rains (up to 75mm) in coastal areas of Middle Shabelle and Galgaduud regions. In addition, most of the northern and central regions are expected to remain dry during this period. According to FAO SWALIM's Flood Watch Bulletin (13 Dec. 2011) the river levels declined drastically for both Juba and Shabelle Rivers in the first dekad of December. Thus, the risk of flooding remains minimal (Map 3).

¹ LTM (1983-2010) Climate Prediction Center, Africa Rainfall Estimate Climatology, NOAA

SOUTHERN SOMALIA: DEYR 2011/12 FLOODS

Flash and river floods occurred in most southern regions in October-December 2011 following heavy rains within the Juba and Shabelle River basins both inside Somalia and the Ethiopian highlands. The floods were exacerbated by weak river embankments and artificial river breakages especially in the lower reaches of the two rivers. The flooding subsequently led to crop field inundation and/or destruction of standing crops in parts of Juba valley, Middle and Lower Shabelle, Bay and Gedo regions. Normally, in southern Somalia surface runoff resulting from heavy rains in the Ethiopian highlands contribute immensely to high river levels inside Somalia leading to river spillages. However, in this *Deyr* season, flash floods were more common as opposed to natural river flooding due to heavy storms experienced inside Somalia.

Several flash floods were reported in Lower and Middle Shabelle in late September to mid-November. Flash floods in the Kurtunwarey area (L.Shabelle) were mainly attributable to the antecedent soil moisture conditions and the weak river banks in the areas. However, the destruction to standing crops (maize and sesame) within the limited flooded areas is insignificant, about 140ha of maize and 100ha of sesame. This district is expected to benefit from off-season harvest. In Jowhar area (Middle Shabelle), flooding of maize farms was managed through diverting river overflow into the rangeland or agropastoral areas by creating a river breakage. As a result, the effects of flooding in this region is insignificant compared to area planted. Furthermore, the breakage is still active and the water that extends to non-agricultural areas (Mahaday zone) could benefit late planting of sesame, maize or beans.

In October, all the riverine *desheks* of Middle Juba experienced devastating floods affecting planted areas. Only a small portion of cultivated maize did survive the flooding in Sakow (4%), Buale (7%) and Jilib (17%). However, the floods provided opportunity for recession cultivation, which started in December. In Jammame district of Lower Juba, flooding of the river adjacent lowlands and some of the main *desheks* (Janbarow, Burgaan and Dashek wamo) were mainly human induced to facilitate recede cultivation. However, the targeted arable lands submerged as a result of uncontrolled flooding following an increase in river levels and weak river embankments. Almost 50 percent of the land under early planting were destroyed and had to be re-planted.

In Bay region, flash flood incidences affected crop fields planted under maize (nearly 2,000ha). The percent of affected cropped areas is higher in Qansahdere (20%) and Bur Hakaba (15%) compared to Baidoa (10%) and Dinsor (5%). Of concern to crop development in this region is the high weed infestation and effects of water logging.

The riverine areas of Gedo region experienced flooding during the first week of December following heavy rains in the upper reaches of the basin. However, most of the inundated land at the time of flooding was fallow, hence damage to standing crops (maize and vegetables) was limited (10%). Off-season crop production is expected from recede cultivation in Gedo region.

The table below summarizes the *Deyr* 2011 flood information in southern Somalia verified by Flood Information Group (FSNAU, SWALIM and FEWSNET).

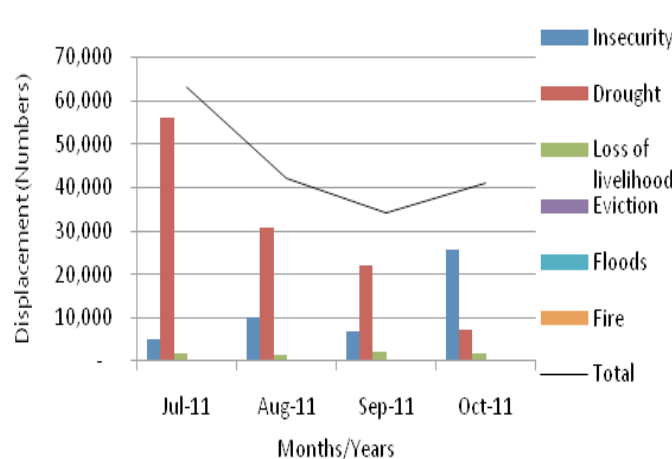
	Region/District	Type of Flood	Effects of Floods	Flooding Period
Juba River Basin	Gedo Region			
	Luuq Dolow Baardheere	Flash floods	<ul style="list-style-type: none"> Area cultivated reduced, significantly Inundation of fallow farmlands Insignificant crop loss 	Oct 2011 1st week of Dec 2011
	Buurdhuub (Garboharey) riverine areas			
	Lower Juba			
	Afmadow (Jiira plain)	Flash floods	<ul style="list-style-type: none"> Limited crop field flooding and destruction 	Oct 2011
	Hagar district	Flash floods	<ul style="list-style-type: none"> Flooded crop fields 50ha of crops destroyed Considerable disruption of access to most of the roads leading to key inland settlements 	
	Jammame	Flash floods and human induced river floods	<ul style="list-style-type: none"> 10,000ha-15,000ha of farming land flooded 2,000ha-3000ha of maize, sesame, cowpeas and vegetables destroyed 	
	Middle Juba			
	Sakow, Sagale, Buale, Jilib.	Flash, human induced and natural river flooding	Severe devastation of standing crops and seedlings. <ul style="list-style-type: none"> Sakow: Riverine - out of the 2400ha of the cultivated maize area about 100ha survived flooding while the rest were inundated; Agropastoral – 6,400 out of 10,600ha survived Buale: Riverine – out of the 3000ha of planted maize areas 200ha survived; Agropastoral – out of 1600 planted, 1200ha survived Jilib: Riverine – out of 6500ha of planted maize areas 1,100ha survived from the floods; Agropastoral – out of 1500ha planted 1200 ha survived the floods 	Oct 2011
Shabelle River Basin	Bay region			
	Agropastoral and urban areas (Qansahdere, Baidoa)	Flash floods	<ul style="list-style-type: none"> Minimal destruction in the urban areas Field inundations and crop destruction (maize) in the agropastoral areas Maize cropped areas destroyed: Baidoa (830ha), Dinsor (230ha), Qansahdere (750ha), Bur Hakaba (170ha) ; 2,000ha in total 	Nov 2011
	Lower Shabelle			
	Kurtun Waarey district (Dhayaney and Degaguroow)	Flash floods	<ul style="list-style-type: none"> Crop fields flooded (400ha of maize field and 300ha of sesame field). 140ha of maize and 100ha damaged Water logging remains a major concern 	Late Oct and mid Nov 2011
	Middle Shabelle			
	Jowhar (Diinlow, Duduble, Mansuur and Dinlawe)	Human induced and natural river flooding	<ul style="list-style-type: none"> Insignificant flooding of crop fields Flooding beneficial to rangeland and agropastoral areas owing to diversion of the floods through river breakages 	Late Sep 2011

CIVIL INSECURITY

In the last six months, fighting continued in South-Central among warring parties, including the Transitional Federal Government (TFG), rival armed groups and insurgents. The epicenters of conflicts were Banadir (Mogadishu), Lower Juba, Gedo, Hiran and Galgaduud regions. Kenya's military incursion into Lower Juba in November 2011 has exacerbated the insecurity in that area. Displacements have continued from the hotspot areas while trade routes were disrupted, particularly those from Kismayo port into districts of Juba and Gedo regions. In October-November 2011, sporadic and recurrent clan conflicts over land ownership, access to rangeland resources as well as on the ground of revenge continued in some rural settlements of central and northern regions. In November 2011, following a ban imposed by a Somalia militia group, key humanitarian agencies suspended their operations in parts of southern and central Somalia. This will have negative implications on the food security situation in these areas given a high concentration of population in crisis there (see call-out box Humanitarian Assistance Levels in 2011, pg. 5).

- Drought was the leading cause of population displacement (65-90%) between July and September 2011 (Figure 1). However, in October, the escalating conflict in South-Central was a primary reason of displacement for 60 percent of the internally displaced people (IDP). According to the monthly population movement report by the United Nations High Commissioner for Refugees (UNHCR) for Somalia, a total of 41,000 persons were displaced in October 2011.
- Violence continued to impact trade activities and commodity movements across the regions in parts of the South (e.g., from the port town of Kismayo to hinterland areas of Juba and Gedo). This led to reduced labour opportunities amongst the poor households, shortages of supplies and high prices of food/non-food items, particularly in Juba regions.
- The volatile security situation also remains a limiting factor for the humanitarian operations in South-Central. According to the Situation Report (Issue No. 12, Nov. 2011) by the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) for Somalia, 16 United Nations (UN) and International Non-governmental Organizations (INGOs) suspended operations in late November 2011.

Figure 1. Population Movement (July - December 2011)



- A number of resource and revenge-based conflicts as well as clan tensions were reported in the rural livelihoods of central and northern regions, particularly in Dhusamareb, Abudwaq and Galkayo (Galgaduud/Mudug), rural areas bordering Burco and Buhodle (Togdheer) and Med-dhebi area in Bari region. These conflicts have resulted in human casualties, displacements and restricted access to rangeland resources and markets.
- Given the on-ongoing militarization and mobilization among the warring parties, particularly in Juba, Gedo and Galgaduud regions, the security situation in these areas is likely to worsen in the coming 3-6 months. Thus, more human casualties and displacements will possibly be seen, while humanitarian space will shrink in most parts for southern Somalia.

HUMANITARIAN ASSISTANCE LEVELS IN 2011

Despite a myriad of complexities involved in providing emergency interventions in Somalia, there has been a massive multi-sectoral response since the declaration of famine in southern regions. The responses were geared towards mitigating extreme food deficits as well as reducing mortality level. The table¹ below summarizes the progress made in terms of the number of beneficiaries reached against the targets set.

Intervention	Targeted Beneficiaries by end of 2011	Beneficiaries Reached from Jan-Oct 2011
Food Aid Assistance	4,045,000 million people	65% (2,644,828) out of 4 million assisted with various modalities of food access.
Nutrition Assistance	450,000 malnourished children	98% (439,824) of 450,000 malnourished children assisted with nutrition interventions.
	1,200,000 preventive blanket feeding	42% (507,042) of targeted 1.2 million covered with blanket supplementary feeding.
Education	436,000 children	78% (338,581) of 436,000 targeted children covered by cluster.
Livelihoods and Agriculture	2.6 million people	62% (1,594,977) of targeted 2.6 million people assisted with vouchers, cash, seeds and fertilizer.
Health	2,300,000 children	51% (1,168,072) of targeted children immunized against measles by end October in measles campaign.
Transitional Shelter	151,000 people	36% (54,726) of 150,899 targeted received transitional shelter.
Emergency Assistance Package (EAP) and Non Food Item (NFI) kits	1,300,000 people	50% (649,962) of 1.3 million target population received EAPs
Sanitation and Water	Sustainable water - 3.3 million people	Of targeted 3.3 million people, 36% (1,201,704) assisted with sustainable water; 1,881,933 people without access to sustained water provided with temporary water; latrines provided to 40% (517,000) of 1.3 million targeted people
	Latrines- 3 million targeted people	
Protection	154,000 people	47% (71,718) victims of protection violations out of target 154,000 assisted.

In spite of continued substantial scaling up of relief operations to meet the needs of people in crisis in southern Somalia, insecurity still remains a key challenge for humanitarian access in most areas. The recent ban imposed on key humanitarian agencies by the Somali militant groups, may quickly reverse the gains made towards alleviating food and nutrition security in southern Somalia. An estimated 3 million people remain in crisis in the South. Nearly 250,000 people continue facing imminent starvation in parts of the Middle Shabelle region as well as Mogadishu and the Afgoye corridor.

¹ October Monthly Humanitarian Dashboard Somalia (First Monthly Dashboard-Revised 5 Dec 2011)

AGRICULTURE

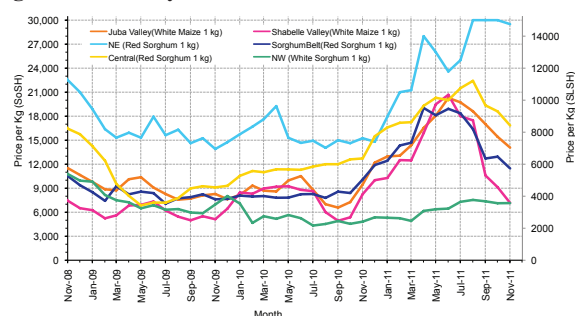
The current outlook for the *Deyr* 2011/12 cereal production is rather positive in southern and central Somalia. However, in most areas in the South, the *Deyr* harvest will be collected gradually, between January and March 2012, due to intermittent planting owing to heavy rainfall. *Deyr* harvest will be minimal in the riverine areas of Gedo and Juba due to significant flood damage to standing crops, although off-season harvest will be collected by end March to early April 2012. The *Deyr* and off-season harvests will considerably increase the local cereal stock availability in most southern regions, including Bay and Lower Shabelle, the major producers of cereals. In the Northwest, the cereal stocks from good *Gu-Karan* harvest (Oct - Nov '11) are likely to extend up to the next year's seasonal harvest. The local cereal prices (maize and sorghum) decreased significantly over the last six months (Jun - Nov '11) in most of the main markets of South-Central as a result of increased supply from a combination of sources such as relief food distributions, limited *Gu* 2011 and off-season harvests (Sep - Oct 2011) and limited cross-border trade.

- The area planted under cereals is average in most farming areas of southern and central regions. The exceptions are Juba and Gedo riverine and Juba agropastoral where river and flash floods (late Oct. to early Dec. 2011) damaged considerable areas with standing crops. Significant population outflow into refugee camps in Kenya and Ethiopia earlier this year, due to drought and conflicts also had an impact on planting levels¹. The overall good planting in the South is a result of abundant rainfall and agricultural package interventions. In the depression areas (*desheks*) of the flood-affected riverine livelihoods of Juba and Gedo, flood-recession cultivation of maize and cash crops has been carried out. Re-planting was also done in localised areas of other regions (Lower Shabelle, Bay) affected by the floods.²
- Current analysis point to an average *Deyr* 2011/12 cereal production in southern and central Somalia, except in flood-affected riverine areas of Gedo and Juba regions. The latter will benefit from off-season crop harvest by end March-early April 2012. The *Deyr* harvest in most southern regions will be collected progressively, from January and March, due to intermittent cultivation attributable to heavy rains. The stocks of local cereals will increase in most crop-producing areas of southern Somalia as a result of average *Deyr* and off-season cereal harvest. In Lower Shabelle and Bay regions, the stocks are likely to last at least up to the start of the *Gu* 2012 harvest. The *Gu/Karan* 2011 crop harvest in the Northwest Agropastoral³ is estimated at 68,000MT with most of it (66%) coming from Gabiley district. This is the second highest harvest in the last 13 years (next to *Gu/Karan* 2010), which is a result of very good and well-distributed *Karan* rains that encouraged cultivation and helped crop development. In the Northwest, the cereal stocks will be available up until the next harvest (Oct - Nov 2012).
- Intense agricultural activities in southern regions for *Deyr* planting season increased demand for labour. As a result, wage rates increased considerably, by 65-90 percent, over the last six months. The farming activities included sowing, first and second weeding, irrigation as well as canal rehabilitation under the on-going cash for work programmes. Labour opportunities for planting, harvesting, weeding, guarding, threshing, etc. are expected to extend up to March - early April 2012 in parts of Shabelle and Bay regions and the riverine areas of Juba and Gedo.
- The local cereal prices in southern Somalia have declined considerably since June, both for maize (riverine markets of Shabelle - 62-72%, Juba - 39-49%) as well as the sorghum (Bay - 32%; Bakool - 34%; Hiran - 52%; Gedo - 58%). This trend is attributable to increased supplies of cereals from various sources, including relief food distributions, limited local production in *Gu* 2011 and the recent off-season harvest (Sep-Oct '11). In November, the lowest maize and sorghum prices were recorded in Lower Shabelle region, in the markets of Qoryoley (5,325 SoSh/kg of maize) and Wanlaweyne (8,000 SoSh/kg of sorghum). This is due to good off-season, relatively better *Gu* 2011 harvest in Wanlaweyne and availability of relief food. In the same month, the highest maize and sorghum prices were recorded in Hagar in Lower Juba (19,500 SoSh/kg) and Adan Yabal (30,000 SoSh/kg) in Middle Shabelle, respectively, due to poor harvests and limited humanitarian interventions. In the North, the highest red sorghum prices in November were in the markets in Bossaso (30,000 SoS/kg) and Garowe (29,000 SoSh/kg) (Figure 2).



Good Sorghum Crop. Wanlaweyn, Lower Shabelle.
FSNAU Nov. 2011

Figure 2: Monthly Trends in Local Cereal Prices



1 UNHCR (Regional Support Hub) estimates as of 18th August 2011 provide that 61,621 people from Gedo, 1,262 from Middle Juba and 389 from Lower Juba moved to refugee camps of Kenya and Ethiopia this year

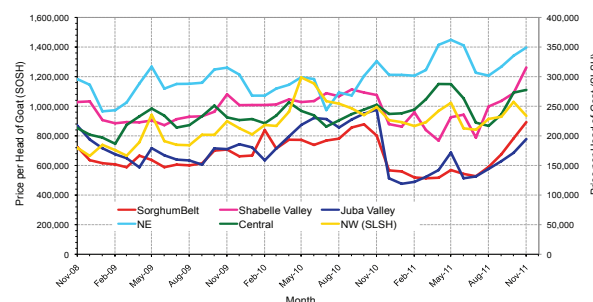
2 See the call-out box on floods on pg. 3

3 The assessment was carried out in Awdal, W. Galbeed and Togdheer regions on 24th Oct - 6th Nov 2011 by FAO/FSNAU, in collaboration with the Ministry of Agriculture of Somaliland, using Pictorial Evaluation Tool (PET).

LIVESTOCK

Deyr 2011/12 rains substantially improved the rangeland conditions in most parts of Somalia. Consequently, water prices have reduced, pastoral migration gone back to normal and livestock body condition is average to good (PET Condition Score CS 3 and CS 4¹) across the country for all species. Exceptions are parts of Bari and Sanaag regions where poor *Deyr* rains affected pasture and water conditions. Reproduction is low, particularly among the big ruminants (cattle and camel), due to low conception rates in the past drought periods as well as high death among the cattle. The goat herd size increased in parts of Central and North as a result of kidding occurred in late *Hagaa*. Also, high conception is reported in the *Deyr* season with kidding expected in February-March. However, the herd size of all livestock species remains below baseline levels across most livelihoods except in W.Galbeed and Awdal regions and in Golis and Karkaar livelihoods in the North. Milk production improved among goat and camel (calved last *Gu* 2011) in parts of the North (W.Galbeed, Awdal, Togdheer, Nugaal, North Mudug and part of Sool), Central (Galgadud and South Mudug) and the South (Juba and Lower Shabelle). This has led to a slight decline in prices in some markets. Livestock prices (export and local quality) have improved in most parts of the country in the last six months and compared to a year ago following the improved body condition and high demand for export in the current year.

Figure 3: Regional Trends in Local Quality Goat Prices (SOSH/SLSH)



- Normal to above-normal rains received in the key pastoral and agropastoral livelihoods improved pasture/browse to average and above average conditions in most parts of the country. Exceptions are parts of Bari and Sanaag regions (Sool Plateau, Coastal *Deeh* and East Golis of Qandala) where pasture and water are unlikely to sustain till the next rainy season due to poor condition as a result of below average *Deyr* rains.
- Rains have largely replenished most of the efficient *berkads*, natural and man-made dams and streams in the country. As a result, water prices in the rural settlements declined since June 2011 in all southern regions (15-25% in Hiran, Middle Shabelle and Gedo; 30% in Lower Shabelle; 45% in Bay). In the same period, a considerable 78 percent drop in water prices is recorded in Nugaal and North Mudug regions as most of the pastoral households access free water from the natural ponds. Conversely, water prices increased (over 30%) in rural areas of Bari and Sanaag due to poor rainfall. No change in water prices is observed in the remaining areas.
- Livestock migration is mostly normal, within the traditional wet season grazing areas, throughout the country. Pastoral households who out-migrated to long distances during the dry seasons (*Hagaa* and *Jilaal*) have started returning to their places of origin. Exceptions are camel herders from Bakool and parts of Hawd of Togdheer region, who are in out-migration to Ethiopia, due to *Qaniin* (seasonal biting insects) and poor rains in November, respectively.
- Livestock body condition is normal to above normal (PET grade 3-4) across the country. This continues to improve owing to good rangeland conditions and absence of any major livestock diseases. In this *Deyr*, overall kidding is low to medium in all the key pastoral livelihoods, while lambing is low due to poor conception in the previous *Gu* 2011. However, high sheep conception rates is reported in the northern regions, although herd sizes of all species are still below baseline with full recovery expected only after 2-3 repeated good seasons. In most parts of the country, conception and calving of camel is low to none because of low-medium calving reported in *Gu* 2011, while in the southern regions, low cattle calving and high conception is reported this *Deyr* season.
- In June-November 2011, local quality goat prices remained unchanged in the Northeast but showed a slight increase (5%) in central regions (Figure 3). The prices in these zones are 7 and 10 percent higher compared to November last year, respectively, which is a result of improved livestock body condition and steady livestock demand. However, the price of export quality goat in the Northwest declined slightly (5%) in the last six months in line with seasonal trends. However, the price is 17 percent lower than a year ago, which is due to an oversupply in the markets from neighbouring Ethiopia and W.Galbeed and Awdal where the livestock herds are at baseline levels. In November 2011, the prices of local quality cattle and goat in southern Somalia increased compared to June 2011 due to improved livestock body condition.



Good Body Condition. Tula, Oman, Garowe.
FSNAU Nov. 2011

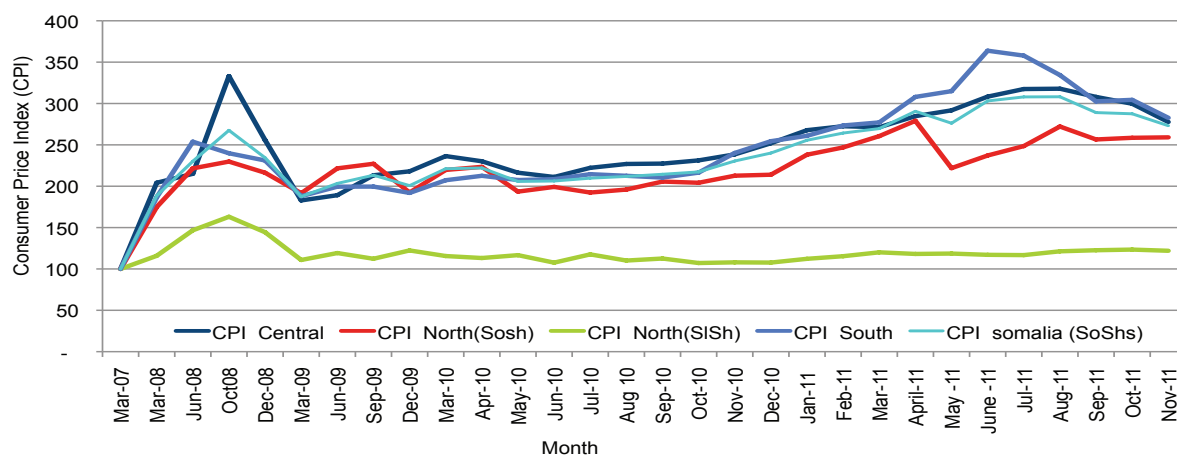
¹ Pictorial Evaluation Tool (PET) is a photo indication scoring method used to score livestock body condition: CS 1 refers to Very Poor, CS 2 - Poor, CS 3 - Average, CS 4 - Good and CS 5 - Very Good body condition. CS 3-4 indicate adequate condition for livestock selling and reproduction.

MARKETS AND TRADE

Local currencies (Somali shilling and Somaliland shilling) have strengthened against the US dollar as a result of increased dollar inflows through humanitarian interventions and livestock export earnings during the *Hajj* period. Prices of most imported commodities showed mixed trends in the second part of the year, decreasing slightly in most SISh markets while remaining relatively stable in the SoSh markets. In Juba regions, however, the prices increased significantly following interruptions of Kismayo Port activities occasioned by the ongoing military operations as well as heavy rainfall disrupting transport links with the Mogadishu Port. Locally produced cereals showed a considerable downward trend due to increased supplies from relief food distributions, some limited stocks from *Gu* and off-season harvest and cross-border cereal inflows. Nevertheless, local cereal prices remain considerably high compared to a year ago in the entire country, with a more pronounced inflation in the southern regions. The consumer price index slowed down moderately in the southern and central regions while increasing slightly in northern regions. Yearly inflation accelerated moderately in the whole country. The changes in the cost of living were in tandem with price trends in cereal and other imported food commodities.

- The Somali Shilling continued its gaining streak that started in June 2011 on the back of increased dollar inflow from the humanitarian community coupled with increased livestock exports from just concluded *Hajj* season. Over the last six months (June-November), retail foreign exchange dealers quoted Somali Shilling (SoSh) at SoSh 24,445-28,843 against the US dollar in most main markets of Somalia with the highest appreciation of 27 percent being recorded in Banadir regional markets. In the same period, the value of the Somali Shilling (SISh) appreciated modestly (4-5%) in the SISh zone markets, which was traded at 5,675 per USD in Hargeisa in November this year. Annual comparisons indicate significant gains in SoSh in the South (up to 25% in some areas) and slight appreciation (5-10%) in Central and Northeast. The SISh, on the other hand, remained relative stable in the main markets of Northwest.
- Prices of most essential imported commodities (red rice, sugar, diesel, vegetable oil and wheat flour) slightly decreased over the last six months in most SISh markets as a result of increased imports at the end of the monsoon season (Jun-Sep). On the other hand, the prices of these commodities remained relatively stable in most SoSh markets apart from Juba regions where moderate increases were recorded for sugar (25%) and diesel (16%). This is mainly due to disrupted port activities (Kismayo) as a result of ongoing military operations as well as heavy rainfall hindering land transportation of goods. The annual price comparisons indicate moderate increases for red rice (10-16%), diesel and vegetable oil (13-44%) in most markets of the country. The highest price increments are observed in the Juba valley trade catchments. However, some price decreases are recorded in Shabelle and Banadir regions for sugar (14-21%) and wheat flour (4-8%). The main underlying factors shaping price patterns in this reporting period and in the short-run include: international food commodity and oil prices, the exchange rates (shilling/dollar), level of humanitarian interventions and ease of trade flows.
- In the last six months, inflation decelerated by 10-22 percent in South-Central, mostly as a result of reduced cereal (sorghum) prices following increased supply from humanitarian food interventions, small *Gu* 2011 and off-season harvests and cross-border cereal inflows. However, in the northern regions the Consumer Price Index (CPI) has increased moderately (4-9%) due to increases in red sorghum prices (Figure 4). Yearly comparison indicates a 13-22 percent increase in inflation this year throughout the country. Compared to the base period (March 2007=100) the CPI is 159-183 percent higher in SoSh markets and 22 percent higher in SISh markets.

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



NUTRITION

The latest round of nutrition and mortality surveys conducted in October 2011 in southern Somalia indicate extremely high levels of global acute malnutrition and mortality compared to normal levels for this time of year, yet show some improvements from the round of surveys from August 2011. In most of the southern regions the rates of acute malnutrition remain near or above 30%, and depict a **Very Critical** nutrition phase. In the north, nutrition surveys conducted in IDP camps in November 2011 depict a sustained worrying situation in Garowe and Burao IDPs, and Serious levels in Hargeisa IDPs.

- In the south the current rates of acute malnutrition are well above the median rate of 15.9% for global, and 4.9% for severe acute malnutrition for the south for this time of year in a normal season. Mortality rates show a similar pattern, though marked reductions are noted in some regions, with less improvements in others. Again compared to the baseline rate of 0.7 for crude and 1.3 for under 5 years mortality, current rates in most regions remain above 1 for crude and above 4 for under 5 years and indicate continued excessive deaths illustrating the fragility of the situation.
- The Global Acute Malnutrition (GAM, WHZ<-2 or oedema) rates from the October 2011 southern surveys now range between **20-34.5%**, and the Severe Acute Malnutrition (SAM, WHZ<-3 or oedema) rates between **6-11%**, with a reduced number of oedema cases, signifying an improving trend from July/August, however still a **Very Critical** and unacceptable situation.
- The crude death rates in southern regions range between **0.9-2.8/10,000/day**. The under five death rates still remain very high, with all the rates still remaining well above the worst Deyr seasons U5DR median rate of 1.3/10,00/day, ranging between **2.7-7.4/10,00/day**.



Internally Displaced Child. Kismayo Town. FSNAU, Oct. 2011

For more details, refer to the FSNAU Nutrition Update, September-November 2011, at <http://www.fsnau.org/downloads/FSNAU-Nutrition-Update-September-November-2011.pdf>

Health Overview

The WHO, *November 26-December 2011 Somalia emergency health update* indicates that:

- For the second week in row, the number of AWD cases in Banadir hospital, Mogadishu, are going down by 35% for week 46 and 10% for week 47 respectively. This is probably attributed to better access to health services in various districts surrounding Medina district. However, the case fatality rate remains high with 2.66, indicating the need for enhanced early community case detection and referral to hospitals.
- The current suspension of humanitarian agencies, including those in health, could have a significant negative impact on access to health services.

For more details, refer to the WHO Somalia Emergency Health Bulletin, November 26-December 2, 2011

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

A large portion of the urban population continues to be in crisis although some improvements were observed in the southern and central regions in the last six months. The cost of living dropped substantially in the South and marginally in the Central following moderate to large declines in maize and sorghum prices. Non-staple food prices (sugar, vegetable oil, wheat flour, etc.) have also reduced in parts of these zones following appreciation of the Somali Shilling and price trends on international markets. In the North, the cost of living remained relatively stable in some regions but exhibited a slight to moderate increases in others due to rising local cereal prices. Average Deyr 2011/12 crop harvest is expected to induce a further fall in cereal prices, which will improve food access among the urban population, particularly in South-Central. However, possible deterioration of security situation in much of the southern and central regions and shrinking humanitarian space could reverse the positive trend of urban food security.

- The cost of living, measured through the cost of the minimum expenditure basket (CMB), reduced by 15-30 percent in the South and 7-15 percent in the Central between June and November mostly due to price declines for local cereals (50% in the South; 12-16% in Central) and some of the imported food commodities (sugar, vegetable oil, etc.). Conversely, in the North, the CMB has increased by 10-12 percent following the rising cereal prices (12-19%) resulting from low supplies from the South and reducing stocks of local cereals. Compared to the same month last year, however, the CMB is high in all urban areas - by 18-19 percent in the South and Central and 22-28 percent in the North.
- The urban poor derive their income mostly from casual labour in portage and construction activities. The market monitoring data indicates increase in wage rates in most regions of the South between June and November. The increase is in the range of 15-30 percent in most urban areas in the South and over 50 percent in Mogadishu and Baidoa. The higher increases in these two cities are stemming from high demand for casual labour due to ongoing intense humanitarian and construction activities (Mogadishu). In contrast, in the Juba regions the wages have declined slightly (6-8%) due to intensified conflicts and tensions that hindered economic activities, hence demand for labour. The wage rates remained stable in the Central and North in the last six months. Compared to a year ago, the wage rates are higher in Central (7-19%) and South (12-22%) with the exception of Gedo and Juba regions where they have declined (7 and 20-34%, respectively) due to the unstable security situation. In the North, wages remained generally stable, except for Awdal and Galbeed regions where they are 14 and 21 percent higher, respectively.
- The significant declines in cereal (maize and sorghum) prices and increases in labour wage rates led to strengthening of the urban poor's purchasing power in June-November 2011 period. On average, the terms of trade (ToT) in the South increased from 3-4 kgs per daily labour wage in June 2011 to 5-9 kgs in November (Figure 1). The ToT has also improved in the Central, from 4kg to 5 kg (Figure 2). In the North, the ToT remained stable in some regions (Bari – 3kg, Sool – 5kg, W. Galbeed - 11 kg) while exhibiting marginal decreases in others (Nugaal, Sanaag, Togdheer and Awdal from 5-9 kg to 4-8 kg) as a result of increased cereal prices (Figure 2). However, the ToT remains low in most regions of the country, with particularly large decreases seen in Juba regions.

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

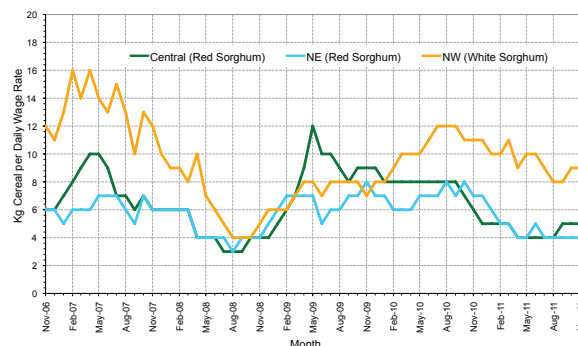
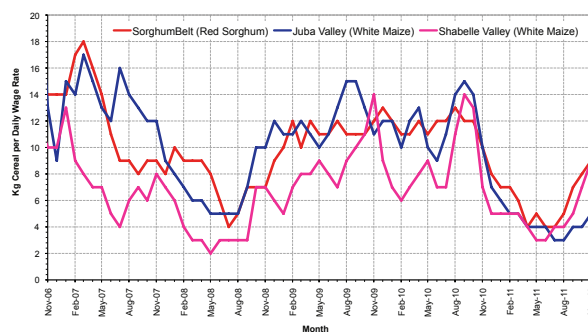


Figure 6: Regional Trend in Terms of Trade Cereal to Labour (South)

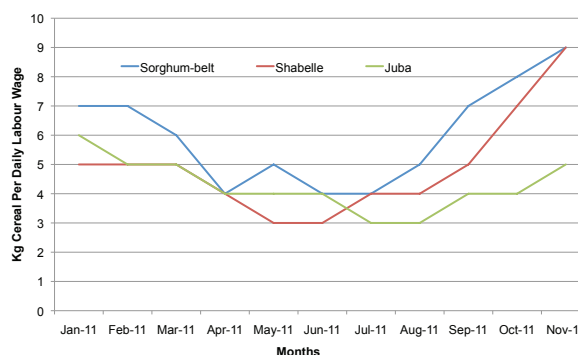


RURAL

Southern Regions

The food security status of the majority of households in southern Somalia has shown some improvements owing to on-going humanitarian interventions, as well as the impact of current good *Deyr* season. Namely, the cereal prices reduced following the increased supply (relief food, limited local production, cross-border); casual labour wages have increased in response to high labour demand for farming activities; livestock production/re-production and prices increased due to improved livestock body condition as a result of good seasonal performance. Further, the positive outlook for *Deyr* crop production suggests improved food access in most farming communities (agropastoral and riverine). However, flood-affected Juba and Gedo riverine areas will experience food shortages in the next three months, i.e. prior to the off-season harvest collection by end March-early April 2012. The pastoralists will continue to benefit from livestock/livestock product sales although the herd sizes for all species are still below baseline levels in most pastoral livelihoods. The positive impact of good *Deyr* season may be compromised by likely reduction of humanitarian interventions due to access constraints imposed by local militia groups. Thus, the majority of poor and very poor households will remain in crisis although some improvements may occur among the middle wealth groups.

Figure 7: Regional Trend in Terms of Trade Cereal to Labour

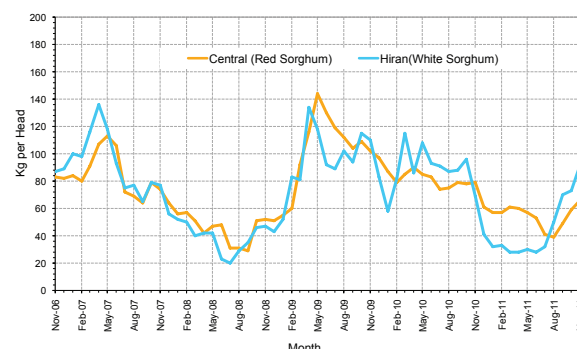


- *Deyr* 2011/12 crop production is expected to be average in most southern regions as a result of good seasonal performance and interventions in support of farming activities (seeds, fertilizers, tractor hours, canal rehabilitations). However, floods damaged standing crops and inundated cultivated land in parts of southern regions. In the worst-hit areas of Juba and Gedo riverine *Deyr* crop production is expected to be well below average. However, these regions will benefit from off-season production by March-April 2012 as a result of recession cultivation in *desheks*. The *Deyr* and off-season cereal harvest will improve the cereal stock availability in most regions. In the major cereal producing regions of Shabelle and Bay the cereal stocks are expected to extend at least up to the next *Gu* harvest.
- November 2011 field reports indicate that the livestock body condition is good across the southern regions. However, calving and kidding is low to medium due to poor conception rates in the last two seasons. However, conception was high for sheep, goats and cattle in most parts of the region and low to medium for camel in this *Deyr* season. The kidding of small ruminants is expected in late February and/or early March 2012, while the calving of cattle will occur in June 2012. Hence, livestock herds, particularly small ruminants, will continue recovering in the coming months. However, the herd sizes will generally remain below baseline for all species in most pastoral livelihoods as the recovery requires several normal seasons. The exceptions are camel herders in Juba and Gedo regions, where herds of camel are near the baseline levels (above 90% of the baseline level).
- Given good outlook for *Deyr* and off-season production the cereal prices will continue reducing in most regions of southern Somalia as harvested cereals start entering the main markets. However, given that harvest is going to be collected intermittently the decline in prices will also be gradual. The prices are expected to start increasing by June, following a seasonal pattern depending on the flow of relief food, which may impact the seasonal price behavior. The recent declines in cereal prices and increase in labour wages and livestock prices improved the purchasing power of population in southern Somalia. The highest ToT between labour wage and cereals in November was recorded in Hiran (12kg), Gedo (12kg) and Shabelle (9kg), while in other regions the ToT was equivalent to 5-6kg (Figure 7). The highest ToT for local goat/cereals was in Shabelle regions (204kg of maize/head). The purchasing power will continue improving given the anticipated decrease of cereal prices and relative stability of livestock prices and daily labour wage rates.

Central Regions

Slight improvement in the food security situation is reported in central regions, which is attributable to several factors: enhanced livestock production and reproduction, improved social support from better-off households and increased food assistance. Gradual recovery of herd size (small ruminants) is reported in all livelihoods as a result of near average *Gu* 2011 and good *Deyr* 2011/12 seasonal performance. Reportedly, an estimated 25-30 percent of destitute pastoralists from the Coastal *Deeh*, Cowpea Belt and parts of Addun are returning to pastoralism with support from kinship and/or friends. However, the livestock holding amongst these pastoralists is far below the baseline levels, hence they are foreseen to remain in crisis. Similarly, the poor households in Coastal *Deeh* and the Cowpea Belt have not yet recovered from the past seasons of drought and hold very low number of livestock assets. Therefore, both livelihoods will sustain in crisis although the expected average crop production in Cowpea Belt will improve food accessibility in a short-term. In Hawd and Addun pastoral livelihoods, the food security situation is expected to improve over the coming six months although the livestock assets are still below the baseline levels (camel - 70% and sheep/goat - 60%) in both livelihoods. These pastoralists will benefit from increased access to saleable animals, livestock prices and improved milk production given good body condition of the livestock; likely decline in cereal prices, hence improved ToT; and some access to food assistance.

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



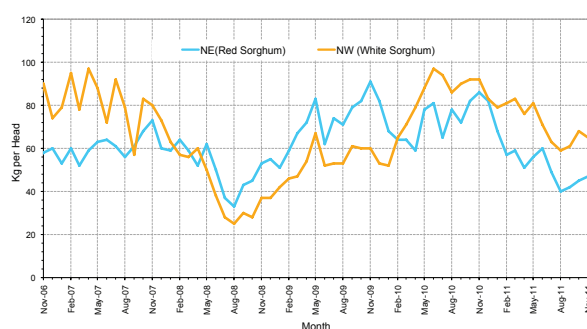
- *Deyr* 2011/12 rains improved the pasture and water conditions in most livelihoods of central regions. As a result, livestock body condition improved and slight increase in livestock prices is recorded across the livelihoods. The purchasing power of the pastoralists in Coastal *Deeh* and Cowpea Belt has shown a significant 83 percent increase in June-November 2011 period (from 41 to 75 kg /local goat) and 44 percent increase from a year ago (52kg in Nov '10), resulting from increased goat price and reduced cereal price. Conversely, in Hawd and Addun livelihoods the ToT (48 kg in Nov '11) declined in the same periods of comparison by 8 percent (52kg/head in Jun '11) and 31 percent (70kg in Nov '10) respectively, as a result of reduced goat price due to disrupted trade activities in conflict areas of Abudwak and Dhusamareb district (Galgadud region) (Figure 8).
- Camel milk availability in Hawd and Addun livelihoods is improving, which is reflected in the decline of camel milk prices in November 2011 compared to June 2011 (25%) and the same month last year (17%). Camel conception and calving is low to none because of medium to high calving during *Gu* 2011 and low to none conception during the *Deyr* 2011.
- Herd size of small ruminants (goat/sheep) is gradually recovering following the low to medium kidding and high to medium conception in *Deyr* 2011 across the livelihoods. In the coming six months, the herd size of small ruminants is likely to increase to near baseline levels in Hawd and Addun. However, in Coastal *Deeh* and the Cowpea Belt the herd size will remain well below the baseline levels.
- Average crop production is expected in Cowpea Belt following the average planting and evenly distributed good rainfall that enabled normal crop development. The production will increase food availability in the livelihood. However, given the large amount of accumulated debts, the stocks will not last up to the next season as large part of the harvest will be sold for debt repayment.

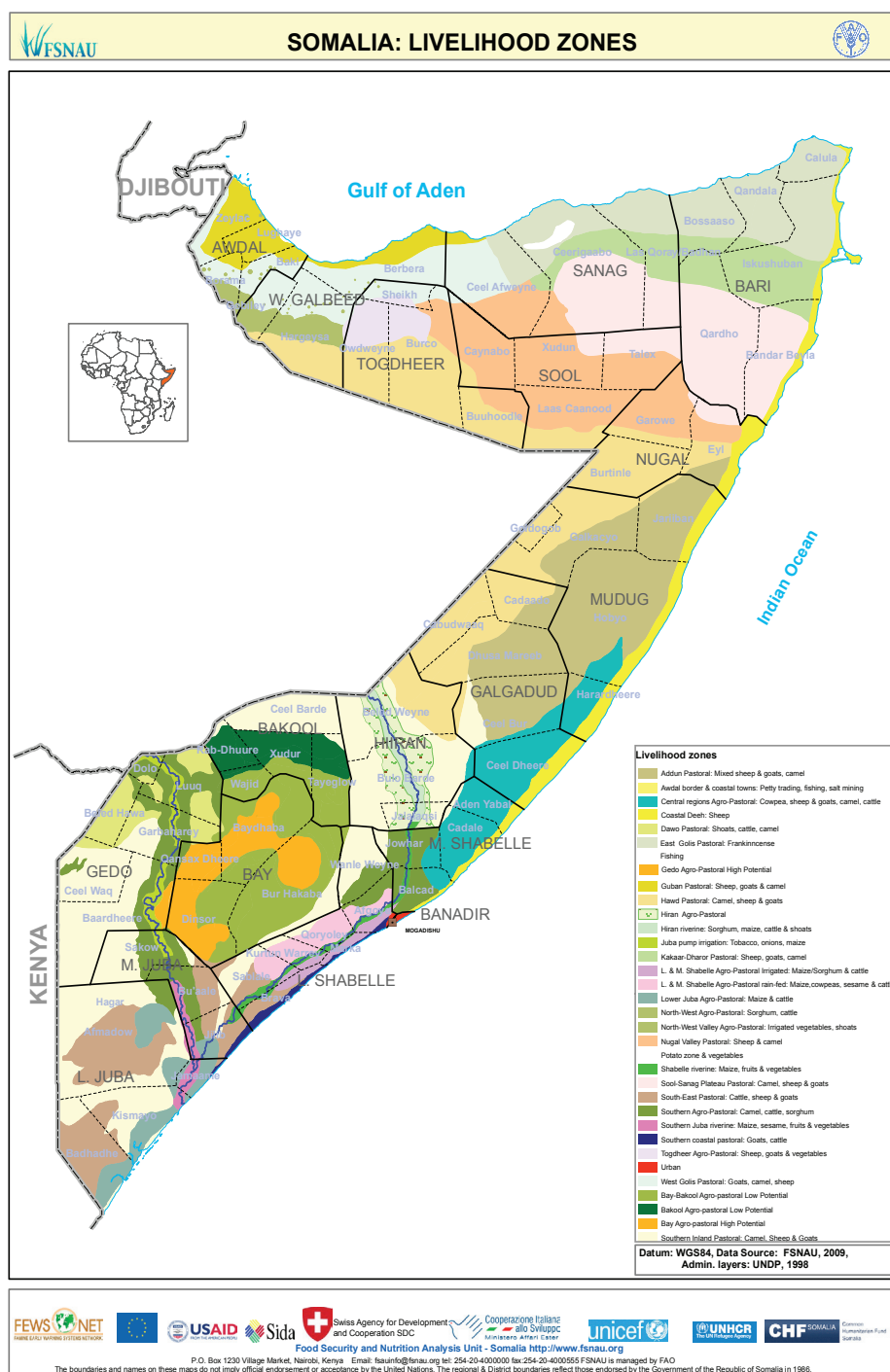
Northern Regions

The food security situation is likely to improve in Hawd and Addun livelihoods as a result of combined effects of near average *Gu* 2011 and the current average *Deyr* 2011/12 seasonal performance. The improvements discerned in these livelihoods are attributable to a number of factors: increased number of sellable animals and milk production due to good rangeland/water resources and improved livestock body condition; strengthened purchasing power; increased social support (milk and live animals); and access to humanitarian interventions albeit limited. On the other hand, Sool Plateau, Nugal Valley, Coastal *Deeh* and East Golis of Qandala livelihoods are likely to remain in crisis due to poor seasonal performance in the last three seasons, accumulated debts and reduced livestock assets. The livestock holding among the poor pastoralists remain below the baseline levels in all the livelihoods except W.Galbeed and Awdal regions. Hence, the poor pastoralists in most livelihoods in the North benefitted only marginally from increased livestock exports in the current year.

- Availability and access to pasture, browse and water improved in the key pastoral areas of the northern regions. No abnormal migration is reported except for parts of Bari and Sanaag regions where pasture and water availability is limited. The body condition of all livestock species is average to good (PET grade of 3-4) due to improved rangeland condition and mostly normal migration
- There is gradual recovery of small ruminants (goat/sheep) as a result of low to medium kidding and high to medium conception in all livelihoods. However, the poor pastoralists' herd size is below the baseline levels for all livestock species across the livelihoods, with the exception of Galbeed and Awdal regions. In *Deyr* 2011, conception and calving of camel is low to none in all livelihoods because of high-medium calving during *Gu* 2011. Livestock assets are considerably reduced in Sool Plateau, Nugal Valley, Coastal *Deeh* and East Golis of Qandala due to prior seasons of droughts.
- Supply of export quality livestock as well as its prices have reduced in the Northwest markets with the end of *Hajj* period. In contrast, the demand remains high for local quality livestock, resulting in price increase in November (10%). The better-off and middle households have benefitted from the livestock trade and started repaying the cumulative debts. Livestock prices are likely to remain steady or decline slightly during the coming *Jilaal* dry season following a normal seasonal trend. In November, the ToT for goat local quality to rice increased in June-November 2011 by 7 and 17 percent in Northeast (61kg rice/head) and Northwest (50kg/head) respectively, while maintaining relative stability compared to November 2010 (Figure 9).
- Improved frankincense production in East Golis enhanced labour opportunities of poor population in this livelihood since September this year. However, this income source will decline over the coming six months following the seasonal trend. At the same time, Coastal *Deeh* and the neighboring parts of Sool livelihoods of Bari region have been benefitting from seasonal fishing activities since September. The fishing season will continue up to end of April next year.

**Figure 9: Regional Trend in Terms of Trade
Cereal to Goat**





Recent and forthcoming publications and releases

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FSNAU Nutrition Technical Series Report, Post Gu '11 Analysis, October 2011

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