

KEY FINDINGS

The food security situation in all livelihoods of Somalia remains as classified during the post *Gu* '09 assessment (June-July '09). The early *Deyr* rains have begun to improve the situation in the drought affected north and the central areas. There is a good off-season cereal and cash crop production in Juba regions in the south. Cereal prices have decreased in the south, except in areas that suffered from *Gu* '09 crop failure. The urban poor food security situation is showing improvement in the south, northeast and northwest, where declines in the cost of minimum basket are observed. However, for the urban poor the situation has deteriorated in central regions due to increased cereal prices and reduced social support. The central regions also have the largest number of population displaced due to the drought. The overall civil security situation has worsened in the south and central causing displacement of over 100,000 people since July '09.

Climate:

During *Hagaa* dry season scattered showers were received in parts of Juba, Shabelle and Bay regions in July-August. At the same time, *Karan* rains in the northwest were erratic, below average and ended early. The rest of Somalia remained dry up to September when early *Deyr* '09 rains started in the central and the northern regions. These rains continued into October. Substantial rainfall received in the Juba and Shabelle river catchment areas within Somalia and the Ethiopian highlands have led to localized and flash flooding along the Shabelle River in Hiran and Shabelle regions in last days of Oct. There is an increased risk of further flooding in the coming weeks for both the Juba and Shabelle rivers.

Civil Insecurity:

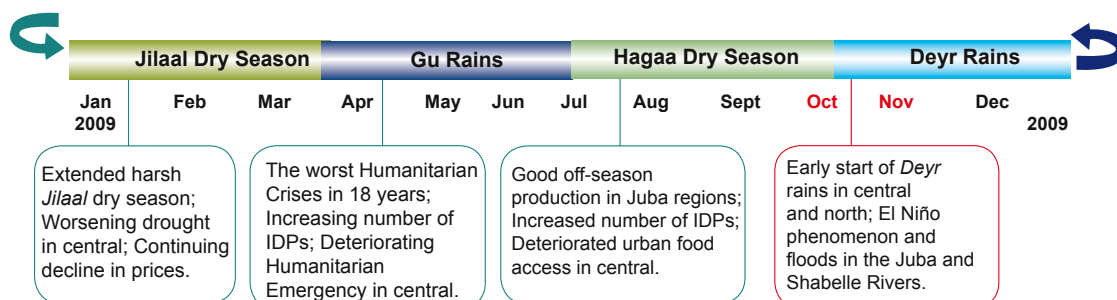
The security situation in the south and the central regions has deteriorated due to intensified clashes between government forces and insurgents, causing civilian casualties, injuries and population displacement. UNHCR estimated that 123,000 people were displaced in Somalia since July '09, mainly due to insecurity and conflict, while drought and loss of livelihood are the second main reason for displacement, mostly affecting central and southern regions. The deteriorated political situation in the northwest in view of presidential elections has stabilized after political rivals signed the agreement at the end of September.

Agriculture:

FSNAU off-season assessment estimated good off-season production of maize and cash crops (sesame, cowpea) in Juba regions. Early *Deyr* rains improved the conditions of established crops in the south, as well as in the northwest, and have encouraged farmers to accelerate *Deyr* planting. Cereal prices have decreased in the southern regions of Shabelle, Bay and Juba as a result of good *Gu* and off-season harvest. However, in Sorghum Belt markets of Gedo, Bakool and Hiran, sorghum prices have increased due to very poor *Gu* '09 production. Commercial cereal imports in July-Sept. '09 were 50% higher compared to the 3-year average (2006-2008) for the same period.

Livestock:

Pasture and water conditions have improved following the good *Deyr* rains. Although livestock body conditions show improvement, livestock reproduction is below average due to low calving and kidding due to low conception during the peak of the drought. Livestock sales increased in Aug.-Oct. because of the increased demand for Hajj. The level of livestock export during Aug.-Sept. '09 is 20% higher than the same period last year. Local quality goat prices have been stable in most regions, with a slight decrease in the Juba regions and increase in the central regions.



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

Markets:

The Somali Shilling has appreciated marginally (2-4%) in July-Sept. '09, but depreciation is still equivalent to 90-95% compared to the 5-year average. The Somaliland Shilling has also gained value slightly (6%) after several months of devaluation. The price of sugar increased throughout Somalia. Additionally, prices increased for vegetable oil in the central regions and for petrol and rice in the northwest. The Consumer Price Index (CPI) remained unchanged in most areas, with the exception of the central regions, where it increased by 21% since June '09, mostly due to the increased prices of sorghum and wheat flour.

Nutrition:

FSNAU and partner agencies are currently conducting livelihood based nutrition surveys in Central, Hiran and Togdheer regions. Nevertheless, the latest figures from selective feeding centres treating moderately and severely malnourished children in south and central Somalia report a varied picture with many locations seeing increasing trends of admissions in recent months as illustrated in the feeding centers in Bakool, Central and Mogadishu. As a result of the confirmed cases of cholera and the elevated cases of acute watery diarrhea in most parts of south Somalia, and concern that the ongoing cholera outbreak might spread due to the high proportion of IDPs in some of the regions, WHO and partners are intensifying preventive activities and case detection and management in the affected areas. More details are available in the *Somalia Health Cluster Bulletin Sept. '09 and the WHO Oct. 15, '09 Bulletin*.

Urban:

FSNAU carried out a seventh round of the rapid quarterly urban emergency assessment in main regional towns throughout Somalia. The analysis indicates that urban households' access to food has begun to improve since June '09 in most areas, with the exception of the central regions. Urban households in the south, the north and northwest are able to cover the cost of the Minimum Expenditure Basket (CMB), however, poor households are still reliant on either remittances, cash gifts or loans to cover between 20-25% of this minimum expenditure basket. In contrast, the deterioration in central regions is mainly caused by increased prices of cereals, subsequent increased cost of the minimum expenditure basket and reduced social support in these regions. Preliminary analysis of nutrition data from the urban assessment using MUAC conducted in Oct. '09 indicates concerning findings in Galkayo. Detailed nutrition analysis will be shared in the Sept.-Oct. '09 *FSNAU Nutrition Update*.

REAL-TIME FLOOD MONITORING & REPORTING

Southern Somalia is entering flood season and both the Juba and Shabelle Rivers are near flood stage. To help the humanitarian community better prepare for potential flooding, the information on reported floods will be verified and widely disseminated.

FSNAU, SWALIM and FEWSNET have formed a Flood Information Group to monitor the flood situation along the Shabelle and Juba rivers. This Group will review, triangulate and consolidate all incoming reports on floods and provide the best possible consensus on the real-time flooding situation and its impacts. The Group will issue daily updates, as required, on the status of flooding, which will be uploaded on the website: <http://www.faoswalim.org/subsites/frmis/index.php>.

We encourage everyone to submit all information on reported flooding to this Flood Information Group at the following e-mail address: floodinfo@fsnau.org.

Please submit the flood reports using the reporting format, which can be downloaded from the following link: <http://www.faoswalim.org/subsites/frmis/links.php>



Beletweyne District, Hiran, October '09



Flooded farmland, Jamaame District, Lower Juba, November '09

SECTOR HIGHLIGHTS

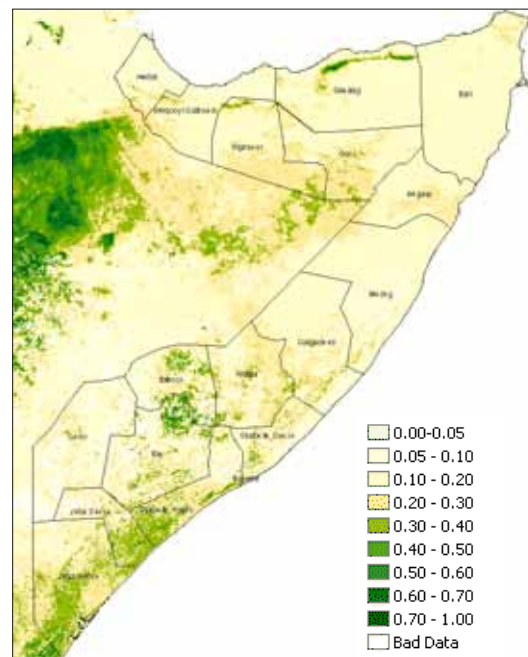
CLIMATE

Somalia was predominantly dry throughout the *Hagaa* dry season (mid-July – mid-October) with the exception of riverine and coastal areas of Lower Juba and Lower Shabelle, and some inland areas of Bay and Juba regions, which received scattered rain showers in July-Aug '09. In the northwest, the *Karan* rains started on time, but varied in intensity and coverage during July to Sept. '09. Field reports indicate that rains were erratic, below average and ended early. SWALIM rain gauge stations in Hargeisa and Borama also recorded below average rainfall.

The *Deyr* rainy season started early in the northern and central parts of the country, with rains recorded in the last two *dekads* of September. In particular, light localized showers fell in the central drought affected Hawd and Addun pastoral areas, as well as the agropastoral areas of south Mudug and east Galgaduud. In the north, rains fell in the pastoral areas of Bari region (Golis, Dharoor) and Nugal (Hawd livelihoods), as well as pastoral and agropastoral areas in the Golis of Awdal and Galbeed and the Hawd of Hargeisa. Moderate to heavy rainfall was observed in the grazing areas of the Sool Plateau of Qardho and Bandar-Beyla districts.

In contrast, most of the southern regions remained dry in September, with the exception of small pockets in Bay, Bakool and Middle Shabelle and the riverine and agropastoral areas of Jalaqasi and Beletweyne in Hiran, which received light localized showers. *Deyr* rains have continued into October with moderate to heavy rainfall in the central regions (pockets of Haradhere and Eldher), Hiran (most parts of pastoral areas of Beletweyne and Bulo-Burti, riverine areas of Bulo-Burti and parts of Jalaqasi) and most parts of the north (Galkayo, Garowe, Nugal valley, Golis and Guban livelihood zones of Awdal, Galbeed and Togdheer regions, Hawd of Hargeisa, Hawd and agropastoral livelihood of Togdheer). Substantial rainfall was reported in the south in the second *dekad* of October.

Map 1: NDVI 2nd Dekad October 2009



Source: JRC/MARS FOOD

climate

Vegetation Conditions

Rainfall in September and October has resulted in improved vegetation conditions across different livelihoods of the country. The Normalized Difference Vegetation Index (NDVI) data for the second *dekad* of October indicates normal to good vegetation conditions in parts of agropastoral livelihoods in Central (Haradere and Elder districts), in the south (Shabelle, Juba, Bay regions) and the north (Galbeed and Togdheer). Vegetation is also good in pastoral areas of Juba and Shabelle regions as well as in the parts of Hiran. In the north, normal vegetation is observed in East-Golis pastoral in Sanaag, pockets of Nugal (Lasanod, Hudun), Hawd pastoral in Togdheer and Sool regions. However, vegetation remains below normal in the rest of the country (Map 1).

Flood Watch

As a result of the El Niño rain effects during the September-December season, there is an increased risk of flooding along the Shabelle and Juba. SWLAIM, FSNAU, and FEWSNET are closely monitoring the river levels and field reports during this high risk flooding period. The last few days of October and first of November already flash floods and localized flooding are reported along the Shabelle river in Hiran and Shabelle regions, with reports of displaced populations and flood damages including river breakages, collapsed latrines and contaminated shallow wells. Most of the displaced populations so far have been able to move to the houses of relatives located in elevated places of settlements. Of increased concern are diseases outbreaks like watery diarrhea, dysentery, malaria, and eye infections if appropriate actions are not under taken on time.



Hiran Beletweyne Flooding, October '09

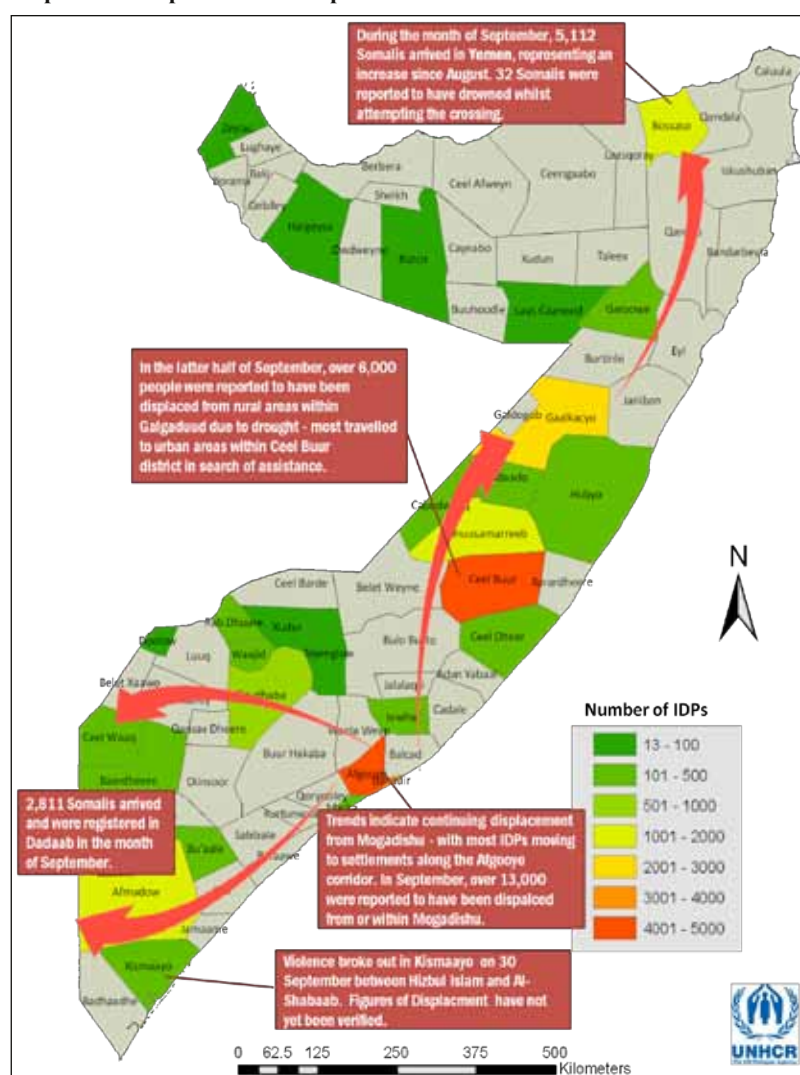
SWALIM river level monitoring system indicated that the Juba and Shabelle river levels remained below normal in September and the first two weeks of October. However, in the third week of October there were heavy rains in the Juba and Shabelle river catchment areas within Somalia and the Ethiopian highlands. As a result river levels increased significantly above the long term mean and are now following the rate increases and trajectory levels of the 2006 flood year (SWALIM Flood Bulletin, Oct. 27, 2009). SWALIM issued an early warning of a moderate risk of flooding (up to the 5 year return period) in the last week of Oct. and first weeks of November for the Shabelle river.

CIVIL INSECURITY

Since June, the security situation in Somalia has deteriorated significantly due to clashes between government forces and insurgents. The epicenter of fighting was in Mogadishu where a wave of armed conflicts, mortar attacks, roadside bombs, suicide bombings and indiscriminate shelling caused civilian casualties, injuries and population displacement. Military activities have also spread elsewhere in south and central Somalia, including Gedo, Lower Juba, Bay, Bakool, Hiran and Galgaduud regions. In September alone 166 people were reportedly killed as a result of violence and suicide attacks (*OCHA, Somalia Humanitarian Overview, Vol. 2, Issue 9, Sept. 2009*).

The political situation has also deteriorated in Somaliland as political disputes deepened between the ruling party and opposition over the presidential term extension and voter-registration. Riots that erupted in the capital of Hargeisa following the postponement of general elections scheduled for the Sept. 29, resulted in the death of three civilians. Somaliland's political rivals signed a six-point agreement on Sept. 30, thereby ending the election crisis. Reportedly, conflicts are likely to be renewed between two rival clans that have amassed a large number of weapons and positioned militia near disputed farmland in the district of Gabiley (W. Galbeed). In parts of the north and central regions, there was an increase in reports of conflicts over land and water resources. If water and pasture resources are not fully replenished in the coming weeks there is a risk of increased conflicts over limited resources in the coming months.

Map 2: IDP Displacement in September 2009



Source: UNHCR, September '09

Humanitarian activities continue to be impeded by the direct targeting of humanitarian workers. Three United Nations agencies (UNDP, UNDSS and UNPOS) were banned by Al Shabab in the areas under their control. Cases of UN and NGO property being looted and attacks on UN compounds were reported in Baidoa, Wajid, Jilib, Jamaame, resulting in suspension of a number of humanitarian activities in south and central Somalia. The number of international staff has decreased from 80 to 57 over the last two months.

Population Displacement

According to UNHCR, an estimated 123,000 people were displaced from July through the end of Sept. '09, mainly due to insecurity and conflict (Map 2). The majority of the displaced persons are from Mogadishu and surrounding areas. There are reports that a significant number of people are seeking refuge to neighboring countries, most notably overland to Kenya and Ethiopia or departing by sea for Yemen from Bossaso. Several Somali refugees drowned in three separate incidents in September after smugglers' boats carrying them from Somalia to Yemen capsized in the Gulf of Aden.

UNHCR also reports that drought and loss of livelihood are the second main reasons for displacement since July '09. About 22% of the total displaced or 27,157 people are displaced due to the drought (over 10,000) or loss of livelihood (16,000). Nearly 80% of the populations displaced due to drought in the past three months are from central regions, while the majority of those displaced due to loss of livelihoods come from conflict-affected areas in the south.

AGRICULTURE

Favourable *Hagaa* rains received in Juba regions from June to August led to off-season cereal (maize) and cash crop (sesame and cowpea) cultivation in agropastoral areas, dhesheks and riverine areas. This was beneficial, especially for those areas that suffered from a complete crop failure in *Gu* '09 season. To determine the final effects of *Hagaa* rains FSNAU conducted an off-season crop harvest assessment in Lower and Middle Juba regions (Kismayo, Jilib, Buale, Sakow, Badhadhe and *Dhesheks* Wamo in Afmadow) in Sept.-Oct. '09. Due to the fighting that erupted in Kismayo in early October, the field data in Lower Juba was collected through teleconferencing with enumerators and key informants.



Good Off-season Maize Cobs, Tafanya Village, Jilib, Middle Juba, October '09.

According to the assessment results, off-season maize production is estimated at 13,343MT, of which 88% is from riverine areas of Lower and Middle Juba regions. Jamaame accounts for about 84% of this maize production, while approximately 6% comes from Jilib. The remaining 10% of production is from other districts. Off-season maize production is 5% less than what was projected during the FSNAU all team *Gu* '09 analysis workshop. However, sesame and cowpea production is estimated at 2,020MT and 990MT, exceeding the projections made during the same workshop by 5% and 23%, respectively. This good off-season crop production has not only improved food access through increased own production, but also increased income opportunities through crop sales and agricultural labour.

In late September and early October '09, early moderate *Deyr* rains were received in agropastoral and riverine livelihoods in Shabelle, Juba, Bay, Bakool, Gedo and Hiran regions. These rains were beneficial for the early *Deyr* dry sowing in agropastoral livelihoods of these regions and encouraged farmers to accelerate land preparation and planting on rain-fed fields. The rains were also favorable to the crops established by early planting in the riverine areas of Lower Shabelle, Middle Shabelle and Hiran regions with functioning and easily accessible irrigation systems.

In the northwest, good rains were also received in late September and early October in agropastoral areas of which contributed to the development of crops planted during the *Karan* rains. The on-going land preparation and planting activities have enhanced access to agricultural labour and contributed to the increase of daily wage rates for poor households.

The Shabelle and Juba river levels have risen moderately due to good rains in the catchment areas of the Ethiopian highlands. It is predicted that Juba and Shabelle rivers may flood due to El Niño rains, which will inevitably damage standing crops, spoil underground pit cereal stocks, and submerge farmlands and villages. Further, the rains could slow crop development and production, thus reducing income accessibility and disrupting markets. There are more than 10 embankment breakages in the Shabelle River and 100 breakages along the Juba River. These breakages remain open and un-rehabilitated and will most likely increase flood severity in the Riverine livelihood. On the positive side, there is also an expectation that floods will provide an opportunity for off-season flood recessional crop planting and harvest, which was the case in the floods of 2006.

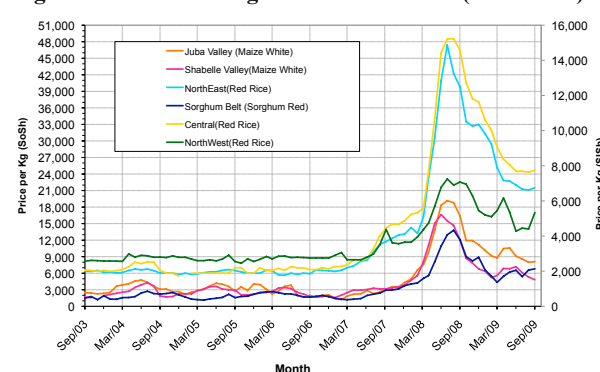
Cereal Availability, Prices and Terms of Trade

As expected and previously reported, cereal prices are continuing to decrease in Shabelle, Bay and Juba regions as a result of improved cereal stocks following the good *Gu* and off-season harvest.

In the Shabelle regions, the aggregated average maize prices for Sept. '09 are 20% lower than in July '09. In the sorghum producing areas of Wanla Weyne and parts of Afghoe, Marka and Qoryoley districts the aggregate sorghum prices have also decreased slightly (3%) due to the improved sorghum production and increased supply during *Gu* '09.

In the Juba regions, maize prices vary considerably across the regional markets. The lowest maize prices in September are recorded in riverine livelihoods of Jamaame and Buale markets (5,000 SoSh/kg), which had good *Gu* '09 and off-season maize productions.

Figure 1: Trends in Regional Cereal Prices (SoSh/SiSh)



However, the highest maize prices were observed in the main market of pastoral livelihood in Dhobley (14,000SoSh/kg) due to remoteness and higher transportation costs (Figure 1).

There are also substantial sorghum price differences between the Sorghum Belt markets. Sorghum prices continue to show an upward trend in most Sorghum Belt markets, while in Bay region they continue to decline. The highest sorghum prices in September were recorded in the Luuq (11,500 SoSh/kg) and Bardera markets (7,000SoSh/kg). These high prices were caused by the *Gu* '09 cereal production failure and low supply of sorghum. The lowest sorghum prices were recorded in Baidoa (4,500SoSh/kg) due to the good sorghum production in *Gu* '09. Generally, between July-Sept. '09 the terms of trade (TOT) between cereal and labour have improved in most major markets in the Shabelle, Juba and Bay regions, with labour gaining value against cereals. For instance, in the Shabelle regions, the TOT between labour and maize increased by 66%, and by Sept. '09 daily labour could be rewarded with 13kg maize.

The highest terms of trade in Shabelle markets were recorded in Qoryoley, showing a 170% increase from July (from 8kg/daily rate to 21kg/daily rate). In Juba regions and Bay (Baidoa market) region, the TOT between cereals and labour are 13% and 31% higher than in July '09, respectively. The daily labour in exchange for cereals in Juba and Bay (Baidoa market) regions are equivalent to 15kg of maize and 15kg of sorghum, respectively. The TOT between sorghum and labour has declined in most main markets in the Sorghum Belt due to very poor sorghum production in *Gu* '09 season and low sorghum supply into the markets (Figure 2).

In July-Sept. '09, Berbera and Bossaso ports received 117,493MT of commercial cereal imports, including rice, wheat and pasta, reflecting the increase by over 50% (from 76,064MT) compared to the 2006-2008 average for the same period. This increase is mainly attributed to the decreased global commodity prices, declining transportation costs and reduced piracy targets to commercial ships. Commercial cereal imports into the Mogadishu port also show similar trends for the same period, indicating an increase of 49% (from 31,538MT to 47,040MT).

LIVESTOCK

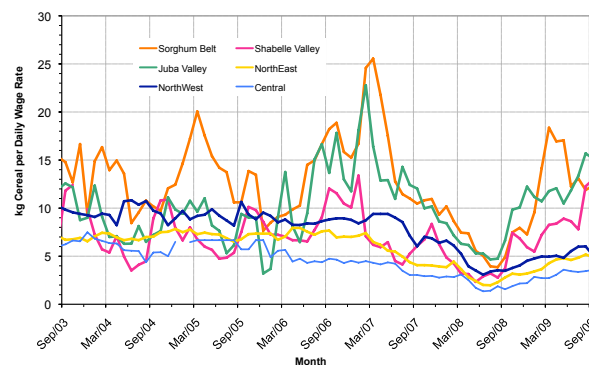
Pasture and Water Conditions

Following the early *Deyr* rains in the 3rd *dekad* of September, pasture/browse and water conditions improved in parts of the northwest, northeast, central and Hiran region. Initial rains have motivated intra-regional migration for many pastoralists and their herds. Further, the good start of *Deyr* rains in most southern regions (Shabelle, Bay, Bakool, Gedo and Juba), as well as in the north, contributed to the replenishment of the *berkads* and water catchments in drought-affected regions. This has alleviated water shortages and contributed to improvement of rangeland conditions.

Livestock Body Condition, Reproduction and Production

Livestock body conditions are showing an improvement in the drought-stricken and rain-deficit areas of the north, central, as well as Bakool and Gedo regions in the south because of the improved water and rangeland conditions. However, the full recovery of livestock will take 2-3 average seasons, particularly for the big ruminants. On the other hand, in the Juba regions the livestock body conditions have already shown significant improvement due to early livestock migration to the coastal and riverine livelihoods during the *Hagaa* rainy period. Livestock reproduction is below average due to low calving and kidding due to the recurrent droughts in most parts of the country.

Figure 2: Regional trends in Terms of Trade: Cereal to Labour



Good browsing, Hawd Livelihood Zone, Togdheer, October '09.



Good cattle body conditions, Juba riverine, October '09.

In Awdal/Galbeed, Lower Shabelle, Bay and Juba, livestock conceptions were good during *Gu* '09, *Hagaa* and *Karan* seasons. Therefore, kidding/calving is expected in the coming month, which will improve livestock herd sizes and increase the supply of milk in these areas.

Livestock Trade, Prices and Terms of Trade (TOT)

Despite the limited livestock supply due to poor body conditions and limited saleable animal heads, high volumes of livestock sales are observed in Aug.-Oct. '09 because of the increased demand for Hajj pilgrimage in November this year. Total livestock exports during August and September reached 499,340 heads, of which 59% (294,925 heads) were exported through Berbera Port and 41% (204,415 heads) through Bosasso Port. This level of livestock exports is 20% higher than the same period last year (416,816 heads). The livestock exports are expected to increase further in November. At the same time, exports of carcass meat have declined due to higher livestock prices as a result of the current high demand in live animals. For example, Beletweyne, Burao and Galkayo abattoirs exported 21,183 carcasses in August and September '09, which is 53% lower than the same time last year when only two abattoirs (Burao and Galkayo) were operational.

Local quality goat prices have been stable in July-Sept. '09 in the northeast, northwest and the Sorghum Belt, while they have reduced slightly in the Juba regions (10%) and increased (10%) in the central regions. Sept. '09 prices of the local quality goat in the northwest and central regions are 27% and 39% higher compared to the same month last year, respectively. Conversely, these are lower in the Sorghum Belt (17%) and the Juba valley (36%). Also, local quality cattle prices in the Juba regions showed 11% (from 2,700,000 SoSh/head to 3,000,000 SoSh/head) increase between July-Sept. '09 due to the improvement of cattle conditions (Figure 3).

Average terms of trade (TOT) between cereals and goat have increased in Shabelle (26%), Juba (4%) and Central (13%) regions between July-Sept. '09. The increase is due to a significant decline of cereal prices, although livestock prices are still above the long-term mean (Figure 4). However, there was a slight decrease of TOT in the northeast (4%), northwest (12%) and the Sorghum Belt (13%) areas, because of increases in the average prices of rice and sorghum. The highest TOT between cereal and local goat are recorded in the Shabelle regions (221kg of maize/head) and the Sorghum Belt (105kg of sorghum/head), while the lowest TOT are observed in Northwest (40kg of imported rice/head), Central (46kg of imported rice/head) and Northeast (58kg of imported rice/head).

MARKETS AND TRADE

The Somali Shilling (SoSh) has appreciated slightly against the US dollar (USD) between July and Sept. '09 (by 2-4%) in most markets. The average value of the currency over this period is 10% greater than in July-Sept. '08. However, the level of depreciation is still significant compared to the 5-year average (2003-2007), ranging from 90-95%. The Somaliland Shilling (SiSh) has also started gaining value in July-Sept. '09 (6%) after several months of progressive devaluation (Dec. '08-June '09). In September '09, the SiSh exchange rate of 6,500 SiSh/USD at Hargeisa market is comparable to the 5-year average (2003-2007) (Figure 5).

Commercial Import Commodity Prices

From July to Sept. '09, the supply of imported commodities was normal in most markets and the prices of red rice, vegetable oil and petrol stayed relatively stable. The exceptions are in the central and northwest markets where price increases were observed for vegetable oil (14%) in the former, and petrol (16%) and rice (25%) in the latter.

Figure 3: Regional Trend in Local Quality Goat Prices (US\$)

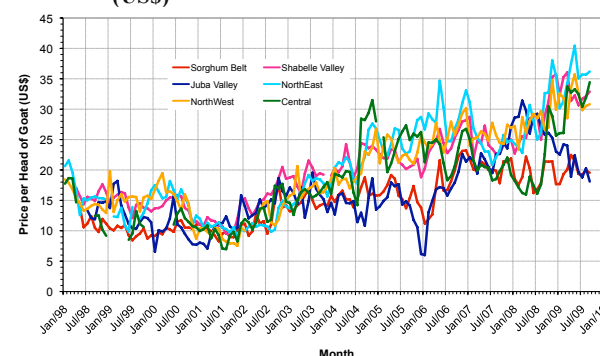


Figure 4: Regional Trends in Terms of Trade, Cereal to Local Quality Goat

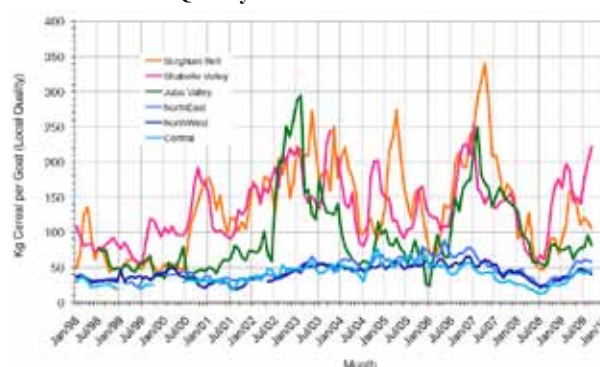
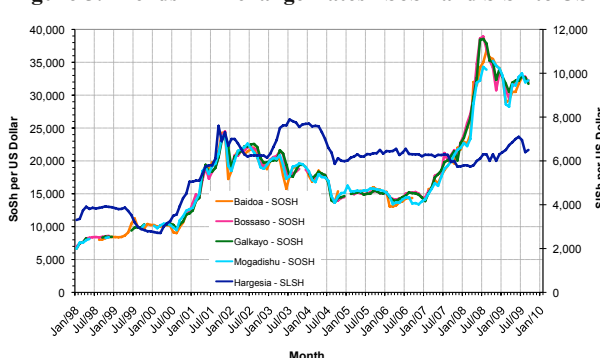


Figure 5: Trends in Exchange Rates - SoSh and SiSh to USD



Further, sugar prices increased in all market areas by 19-40%, with the largest rise recorded in the Juba valley. The northwest showed the highest average percentage increase in prices compared to the other regions with increases for most imported commodities (petrol, rice and sugar), except vegetable oil, which has declined by 10% since June '09 (Figure 6). In the Somali Shilling areas, the Juba regions had the highest prices for most commodities in July-Sept. '09, with the exception again being vegetable oil, which was second only to the central regions (Figure 7).

Compared to Sept. last year, the prices of all major imported commodities (petrol, red rice, and vegetable oil) are lower in the current month in all areas. The exception is the price of sugar, which increased (3-34%) over the past year (Sep. '08 – Sep '09), with the highest increase observed in the northwest and the lowest in the northeast. Overall, the prices of all commodities in Somali Shilling areas are considerably higher (103 - 251%) compared to the September 5-year average levels. The prices are also higher in Somaliland Shilling areas (16-77%), with the rice price showing the highest increment.

Cost of Living for Urban Poor

Between July and Sept. '09, the Consumer Price Index (CPI), calculated based on the Cost of the Minimum Expenditure Basket (CMB), remained unchanged in all regions except for the central region, where it showed a 20% increase. Also, compared to the same period last year there is a substantial decline in the CPI, in the range of 53-143%, in all areas, indicating reduced inflationary impact. Since the base period of March '07, however, the increase in the CPI is equivalent to 70 - 90% in all Somali Shilling areas and 10% in Somaliland Shilling areas.

As cereals account for the largest share (50-60%) in the Minimum Expenditure Basket (MEB) of the poor, CPI changes tend to correlate with the cereal price changes. In this regard, the increase in the CPI in the central regions is mainly attributed to the cereal price increase (20% for sorghum and 3% for wheat flour). Conversely, relatively large decrease of cereal prices in the markets of northeast (about 19%) is reflected in a larger short term CPI decline (Figure 8).

NUTRITION OVERVIEW

The Impact of Drought on Nutrition in July-Sept. '09

The Post Gu'09 integrated nutrition situation analysis indicated deterioration or a sustained poor nutrition situation in most parts of Somalia, with the exception of the West Golis/Guban livelihood zones in the northwest where an improvement was observed. The key driving factors in most of South and Central regions where the nutrition situation is above the emergency threshold of 15% (Figure 9), include food insecurity caused by prolonged drought in parts, civil insecurity and continuing high prices of basic commodities, including milk and livestock products.

Figure 9: Rates of Global Acute Malnutrition (WHO GS) Gu 2009

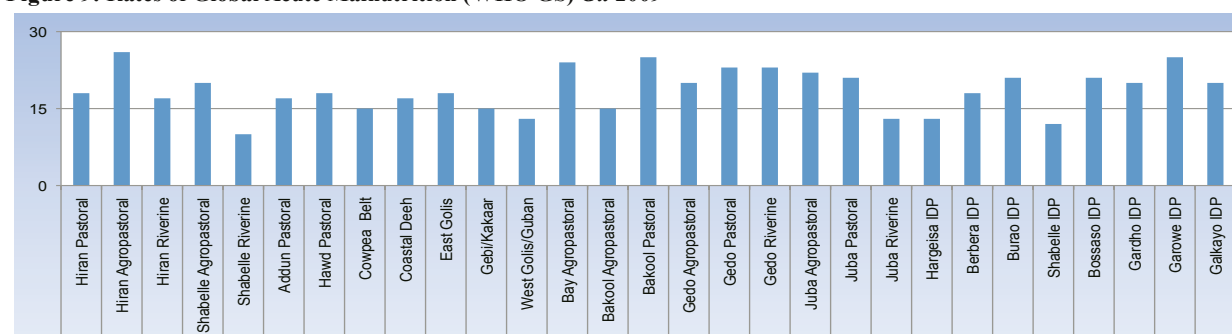


Figure 6: Northwest Imported Commodity Prices compared to Exchange Rate

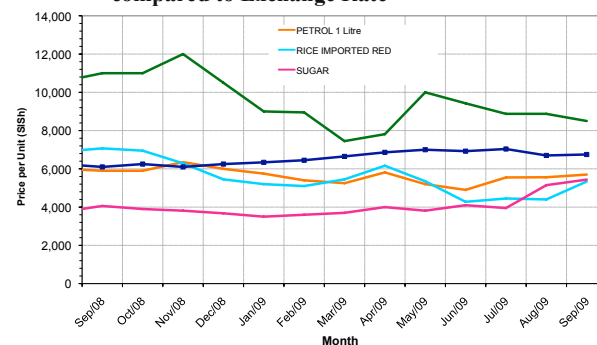


Figure 7: Imported Commodity Prices in Somali Shilling Areas (September '09)

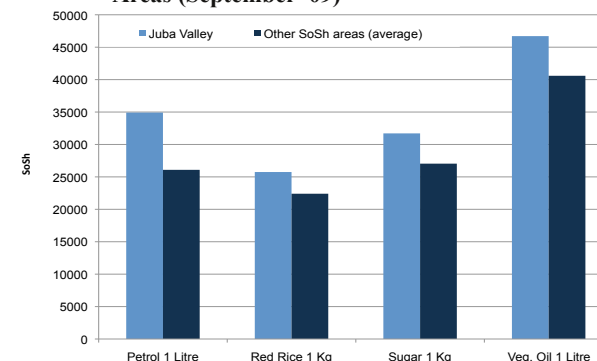
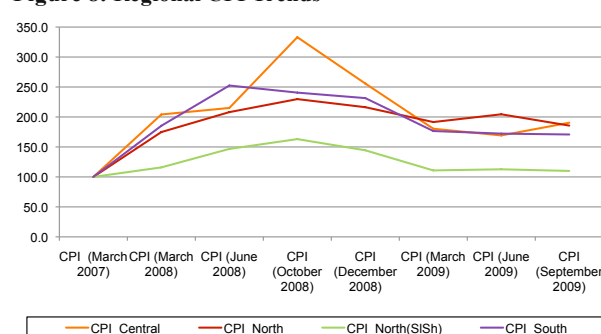


Figure 8: Regional CPI Trends



Recent research highlights the importance of milk as the main source of nutrition in the pastoralist population's diet for the young child and states that increasing milk intake (which provides energy as well as protein) is protective against wasting as well as stunting in young children." (Source: *'Milk Matters: A literature Review of Pastoralist Nutrition and Programming Responses – Kate Sadler et al, Feb 2009, page16*). Therefore, it is unsurprising that in Somalia when the availability of milk is reduced in pastoralist populations, wasting levels increase (current situation in Central and Bakool regions) and when access to milk increases, wasting levels reduce (current situation West Golis Guban livelihood).

In the southern regions, elevated disease incidence, caused by a poor public health environment and sub optimal Infant and Young Child Feeding Practices (IYCF) remain the main driving factors of the nutritional crisis and with the newly reported outbreak of Acute Watery Diarrhoea (AWD – see below) there are concerns that this will remain a risk factor for a further deterioration in the already fragile nutrition situation. The latest figures from selective feeding centres treating moderately and severely malnourished children in South and Central Somalia report a varied picture with many locations seeing increasing trends in recent months as illustrated in the feeding centers in Bakool with 751 children, Central with 379 children and Mogadishu with 564 malnourished children admitted.

Acute Water Diarrhoea Update

(Ref: *Communicable Diseases & Environmental Health Surveillance of Diarrheal Diseases/ Cholera, produced by the Health Cluster*)

Between 26 September and 2 October, 80 cases of AWD and 1 related death were reported in Banadir hospital in Mogadishu. 65% of all cases (52) were children under the age of 5 years. WHO conducted rumor verification and case investigation, and collected 10 stool samples (all from children under the age of 3 years) on 6 October. 2 of the samples tested positive for *Vibrio Cholerae*, serotype *inaba*.

In epidemiological weeks 35-38 (29th August - 25th September),

- Lower and Middle Juba: 435 cases of Acute Watery Diarrhoea (AWD) were reported. This is an increase of 34% compared to the previous month. Of all reported cases, 82% (356) were children under 5 years. Water chlorination and hygiene promotion activities are ongoing.
- Lower Shabelle: A total of 16,568 consultations were made. Acute Respiratory Infections (ARI) accounted for 20% (3,388), Diarrhoeal Diseases for 9% (i.e. 1,531 cases of which 141 were Acute Watery Diarrhoea and 327 bloody diarrhoea). Other common causes of morbidity included injuries (552); Malaria (345 cases of which 37 were laboratory confirmed).
- Middle Shabelle, in response to a renewed sudden increase of AWD cases in Warsheikh district, a cholera treatment center (CTC) was re-opened on 5th September 2009. Majority of the 44 cases admitted into the CTC were children aged below 5 years.
- WHO is investigating rumours of suspected AWD cases and related deaths, in Elwak District.
- One out of five samples taken in Burtinle (Mudug) tested positive *Vibrio Cholerae*, serotype *Inaba*.

As a result of the positive findings of cholera and the elevated cases of acute watery diarrhea, and that the ongoing cholera outbreak might spread due to the high proportion of IDPs in some of the regions, WHO and partners are intensifying preventive activities and case detection and management in the affected areas. More details available in the *Somalia Health Cluster Bulletin September 2009*, and the *WHO October 15th, 2009 Bulletin* at <http://www.emro.who.int/somalia/healthcluster.htm> and <http://www.emro.who.int/somalia/CollaborativeProgrammes-eha.htm>.

As part of the flood early warning preparedness, the Somalia health cluster recognizes that *displacement, AWD, respiratory infections, vector-borne-diseases, injuries, hampered access to health services, loss of health facilities infrastructures and zoonotic diseases*, as flood related risks and has developed a *Flood Response Preparedness/Contingency Plan* to sustain access to health services, communicable disease and vector control. (Source: *Somalia Flood Response Preparedness: Health Cluster Contingency Plans (draft), 10th October, 2009*).

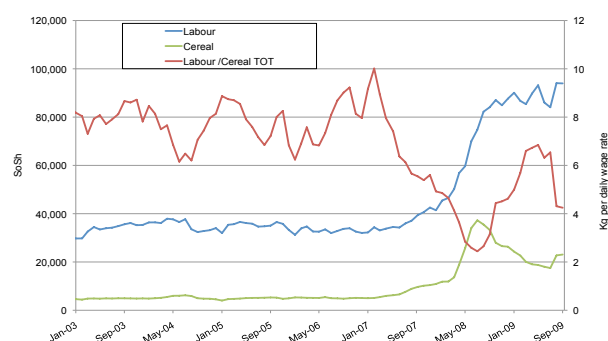
The FSNAU in collaboration with partners is scheduled to conduct 23 nutrition assessments from October – December 2009, to review the nutrition situation in the varied population groups. 19 of these are livelihood based, two are region specific while the other two will target IDPs. The two-stage cluster sampling methodology will be used in all the surveys, with probability proportionate to size being applied in at least eight, and the small sample cluster survey (together with the probability calculator) in 13 surveys. Surveys are on-going in the Hawd and Addun pastoral livelihood zones, Galgaduud and Mudug regions in central regions; Hiran pastoralists, agropastoralists and riverine livelihood zones and Togdheer pastoralists (Hawd) and agropastoralists. Findings from these and other scheduled surveys will be shared in the monthly interagency coordination meetings and through the bimonthly nutrition updates.

INTEGRATED FOOD SECURITY ANALYSIS

URBAN

In October '09, FSNAU carried out its seventh round of quarterly rapid urban emergency assessments in the main regional towns throughout Somalia. Two towns, which are normally included in the assessment, Kismayo and Dhobley, could not be accessed due to worsened civil insecurity. The analysis indicates that urban households' access to food has begun to improve since June '09 in most areas in Somalia, with the exception of the central regions. Urban households in the south, the north and northwest are able to cover the cost of the Minimum Expenditure Basket (CMB). However, poor households are still reliant on remittances, cash gifts or loans to cover between 20-25% of this minimum expenditure basket. In contrast, the deterioration in central regions is mainly caused by increased prices of cereals, subsequent increased cost of the minimum expenditure basket and reduced social support in these regions. Preliminary analysis of nutrition data from Galkayo urban assessment using MUAC conducted in Oct. '09 also indicates concerning. Detailed nutrition analysis will be shared in the Sept.-Oct. '09 FSNAU Nutrition Update.

Figure 10: Central, South, Northeast Average Wage Rate Cereal Prices and Terms of Trade Cereal to Labour



Urban food access is primarily determined by the ability to purchase food. The deterioration in urban food access in the central regions is mostly attributed to increased food prices. Since June '09, prices of local cereals and major imported food commodities of the minimum expenditure basket have increased in the main urban markets of the central regions. Namely, prices have increased for sorghum (25%), sugar (19%), and vegetable oil (14%). Conversely, overall red sorghum prices have declined in other areas (south, north and northwest), although there are substantial price differences among the regions. Reduced red sorghum prices are recorded in Baidoa (Bay) and Beletahawa (Gedo), while the prices have increased in the other urban markets of the Sorghum Belt. Maize prices have also reduced in Shabelle and Juba regions. In the northern regions where rice is the main staple food, prices stayed relatively stable in the North, while they have increased by 25% in the Somaliland Shilling areas in the northwest.

The sorghum price increases in the central regions (25%) are reflected in the increased cost of Minimum Expenditure Basket (CMB) since June '09. The average CMB increase in the main towns of the central regions is equivalent to 25% between July and Sept '09. Conversely, the CMB has reduced marginally (4-7%) in the rest of the country over the same period. Terms of Trade (TOT) between labour and cereals, an indicator of household purchasing power, has deteriorated in a number of main urban markets between July-Sept. '09. The central regions again show the largest decline (16-40%) in the TOT compared to the south (9-19%) and the northwest (5-12%). Conversely, the TOT remained stable in the northeast regions since the previous assessment. There are large variations in the TOT changes in the southern regions, with the greatest deterioration in Hiran (19%) and marked improvement in Baidoa (Bay - 67% increase) and Jowhar (Middle Shabelle - 38%). The deterioration in Hiran is mostly attributed to substantially increased sorghum price (33%). At the same time, the improvement in Baidoa is because of the reduced sorghum prices (by 20%), as well as considerable increase in daily labour wages (by 30%) due to the intensified agricultural activities for *Deyr* planting.

Overall, wage rates are stable since June '09 in most urban areas with the moderate decline observed in a number of markets in the south (Gedo -16%; Middle Juba -20%), central (Abudwak - 16%) and the north (Sanaag - 8%). The main reasons for the decline include drought (central and north) and worsened civil security (south and central). Conversely, wage rates have increased in the northwest (Borama - 30%), which is attributed to increased job opportunities during *Karan* planting.

As a result of high food prices compared to pre-inflation levels (March '07), urban households spend over three-quarters of their income on food. The expenditure pattern in the central regions is similar to that observed in June '09, with staples comprising more than half of the urban households' food expenditures, which accounts for over 80% of their total expenditures. Conversely, in the south spending on staples has decreased by 40% due to good *Gu* '09 and off-season cereal production in key cereal producing areas, increased food gifts and food aid. At the same time, in the north expenditure on cereals have doubled, while milk expenditure has also almost tripled (266% increase) due to significant increase in milk prices following the several seasons of drought. Consequently, the share of food in the total expenditures of urban households in the north increased from 57% in the previous assessment to 80% in the current. In the Somaliland Shilling areas, the urban households' average expenditures on cereals have decreased by 15% as households increased consumption of sorghum in lieu of the traditional rice due to the increased prices of imported rice. The incomes of urban households in the south, the north and northwest areas are sufficient to cover the CMB. However, about 20-25% of the poor households' expenditures in the north and northwest areas are covered by remittances, cash gifts and loans, respectively. Conversely, households in the central regions have an average expenditure gap of 10% as their incomes are not sufficient to meet the CMB, mostly due to the reduced social support (remittances, gifts, loans) in this region.

RURAL

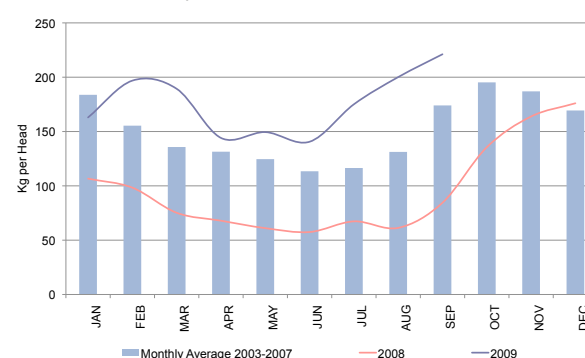
Southern Regions

The food security situation in the southern regions remains in crisis, despite the start of the *Deyr* '09 rains, especially for rural population in Gedo, Bakool, and Middle Shabelle. The situation is exacerbated by intensified armed conflicts in Lower Juba, Bakool, Mogahdishu and Gedo during the reporting period. Additionally, clan conflicts have broken out over scarce natural resources on the border between the Middle Shabelle and Hiran regions. These conflicts have caused population displacement and restricted cross-border trade. Furthermore, the conflict has caused the pull out of humanitarian agencies and restricted the delivery of much needed aid. However, the food security situation in Lower Shabelle, Bay, Middle Juba and parts of Lower Juba are experiencing improvement because of average to above average *Gu* '09 crop production and off-season crop production in areas of Juba.

The *Deyr* '09/10 rainy season began in all southern regions in the 2nd *dekad* of October. These rains have had beneficial impacts in key pastoral and agricultural areas. The rains have already mitigated the water crises by replenishing water catchments in most regions. Agricultural activities, such as land preparation and sowing, have begun in all southern regions, thus increasing agricultural labour opportunities and contributing to the increase in daily wage rates for poor households. Large numbers of animals are gradually returning to their livelihood settlements, particularly camels from Bakool, Gedo and elsewhere that migrated to Bay, Lower Shabelle and coastal and riverine livelihood zones in Juba. Livestock prices in the Sorghum Belt and Juba have declined by 2% and 10% respectively, between July-Sept. '09.

These declines have negative implications on the terms of trade between local quality goats and cereal, as sorghum and maize prices increased in most of the drought affected areas of Bakool, Gedo and Southeast Pastoral Livelihood in Lower Juba regions. In the areas not affected by drought, the terms of trade between local quality goats and cereals have significantly increased in the same period. For example, in the main markets of Lower Shabelle the terms of trade increased 20 to 25% between July-Sept. '09 (145 to 250 kg of maize/head of local quality goat) (Figure 11).

Figure 11: Shabelle Terms of Trade, Maize to Local Quality Goat

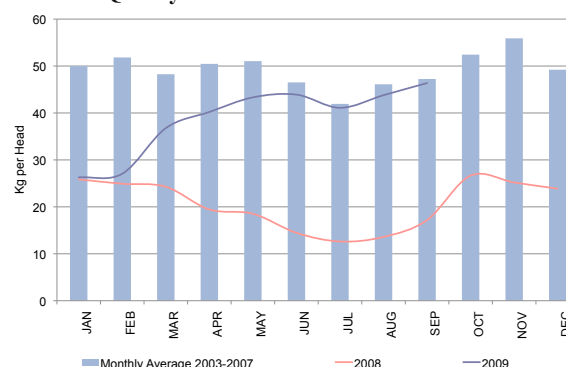


Central Regions

The food security situation in central regions has been deteriorating since *Deyr* '08/09 due to multiple factors, which include recurrent drought, hyperinflation and civil insecurity. The deepening effects of the drought are reflected in eroded incomes and weakened social support mechanisms, forcing households to adopt extreme distress coping strategies. The worsened food security situation has also prompted population migration to urban areas in search of assistance. According to the UNHCR reports, the central regions account for the largest share of displacement (80%) due to the drought observed in July-Sept. '09.

This internal migration towards urban areas affects urban poor in these regions through increased competition for jobs and social support system. During this reporting period the regions again suffered from civil insecurity, as well as increases in prices. Prices increased on all major import commodities, including sugar, vegetable oil and rice as well as the local cereals. Namely, the increment is observed for red sorghum (14%), wheat flour (7%) and white maize (24%). There was a slight increase in local quality goat price between Aug.-Sept. '09, caused by Hajj preparation. However, due to the increased cereal prices, the average terms of trade between local quality goat and cereals declined by 28% and 19% in Elder and Harardere markets (Figure 12).

Figure 12: Central Terms of Trade, Rice to Local Quality Goat



Calving, kidding, and lambing rates were still very low due to the scarcity of pasture and water resources, which resulted in weak body conditions and diseases. The low fertility rates have limited lactation for cows and camels. Consequently, cow and camel milk is scarce and the price of camel milk increased by 15% between July and September '09.

Climatic conditions have shown slight improvement, as light to moderate *Deyr* rains began early, starting on September 21st and 22nd in localized pockets in the agropastoral livelihood zone (cowpea belt) in south Mudug and east Galgadud. However, the impact of the rainfall has not been significant, as the areas were the epicentre of two and half years of ongoing drought. *Berkad* levels remain low due to the lack of run-off water. However, continuing rains are likely to improve pasture and browsing conditions. However, Hiran region has recently been affected by flash floods and more El-Nino-related floods can be expected in the region.

Given the current situation and the depth and severity of the ongoing crisis, even with good *Deyr* '09 rains, it will take several good seasons for the populations to recover.

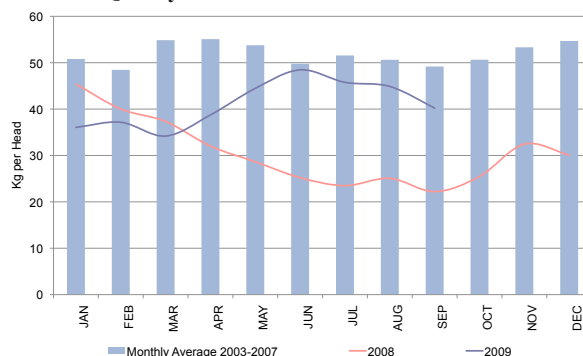
Northern Regions

In the northern regions, most pastoral and agropastoral areas were negatively affected by the cumulative effects of several consecutive seasons of scattered and below normal rains, poor *Gu* '09 rains and the below average *Karan* '09 rains. In particular, following the failure of the *Gu* '09 rains the situation had worsened in pastoral and agropastoral livelihoods of the Hawd, Sool Plateau, Nugaal Valley, Golis/Guban of Sanaag, Addun, coastal Deeh of north Mudug and Nugal. The *Karan* '09 rains began on time in July, but were scattered and limited in amount. There was some limited improvement to pasture following these showers, but the rains did not support the development of long cycle sorghum or the second cycle of maize in the agropastoral areas of northwest.

However, the situation in the north is beginning to improve with the early start of *Deyr* rains during the 3rd dekad of September. In addition, following the good rains in the first ten days of October, most *berkads* and water catchments have been replenished and as a result water trucking has nearly ceased and there has been a significant decrease in water prices. The rains should also improve pasture conditions and enable late season crop planting. If the *Deyr* rains continue and the overall performance is good, there will be a significant improvement in the food security situation for pastoralists and agropastoralists.

Terms of trade between local goat and cereal (rice) indicates a decreasing trend in the northern regions (4% in the northeast and 12% in the northwest) due to the increase of average price of rice, while the number of saleable animals has remained limited with stable prices since July '09 (Figure 13). The number of animals available for sale is limited because herd sizes and body conditions are below baseline norms and are still in the process of recovering from the drought. However, in the northwest (Awdal and Galbeed regions) livestock conceptions were good during *Gu* '09 and *Karan* seasons. Therefore, kidding/calving is expected in the coming month, which will improve livestock herd sizes and increase the supply of milk in these areas.

Figure 13: Northwest Terms of Trade, Rice to Local Quality Goat



Recent and forthcoming publications and releases

FSNAU/FEWSNET Market Data Update, September 2009

FSNAU/FEWSNET Climate Data Update, September 2009

FSNAU Technical Series Report Nutrition Situation, September 2009

FSNAU Technical Series Report, Post *Gu* '09 Analysis September 2009

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



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