

Climate

Markets

Nutrition

Agriculture

Livestock

Civil
Insecurity

Emerging
Regional
Issues

FSAU Project Phase V was officially launched September 1, 2006 with the continuing endorsement and funding by the European Commission (EC Press Release, 18 Sept. '06). During Phase V, FSAU will aim to continue to provide impartial and credible early warning and food and livelihood security analysis. The unit will also strive to consolidate the significant achievements made during Phase IV, and further strengthen technical capacity of FSAU staff and technical partners in food and livelihood security analysis.

In Phase V, FSAU is revising its report schedule to make the production of reports more strategic and timely. Food Security and Nutrition Briefs will be produced six times a year, two will provide highlights of the seasonal assessments (January and August), two will focus on risk factors (March and October), and two will focus on early warning (May and November). FSAU will continue to issue Press Releases as necessary and on a monthly basis, continue to provide updates on sector and integrated regional analysis on the FSAU website and in presentations to the Somalia Support Secretariat (SSS).

KEY

FINDINGS

Climate: Ongoing *Karan* rains in the northwest were normal to above normal for most of the region during August and September. Seasonal coastal *Hays* rains in the northeastern areas were reported to be poor. There were unusual moderate and scattered rains in several inland areas around Gardo, Golis, Erigavo, Nugal of Taleh, Jariban and Burtinle. Central regions, as well as Gedo, Bakool and Hiran regions remained dry over the last two months. Coastal *Hagai* rains were good along coastal areas of Juba and Shabelle Valley, and rains extended into inland areas (page 2).

The Climate Prediction and Application Centre (ICPAC) forecasts the likely occurrence of a neutral or weak El Niño conditions over the next two months for the Greater Horn of Africa. A weak El Niño, would translate into heavy rains in the region and potentially severe flooding in the Gedo region and Juba and Shabelle Valleys (page 2).

Civil Insecurity: As a result of recent events, insecurity and tensions are escalating in the South and Central regions. In the last two months there has been a significant and increasing trend in population movements within and outside Somalia (Kenya, Ethiopia and Yemen) due to the increased fear of an outbreak of conflict. As FSAU previously warned, if widespread conflict were to occur, the impact on the humanitarian crisis would be severe and could potentially lead to a doubling of the current number of people in need of humanitarian assistance (page 2).

Agriculture: Average to good *Hagai* rains in Shabelle and Juba Valleys enhanced crop conditions of late planted *Gu* crops and is encouraging farmers to plant fields previously left fallow. Flooding of the Shabelle River destroyed an estimated 1,000-1,500 ha of cropped area in Middle Shabelle and 400-500 ha in Lower Shabelle. River levels are still high, and there is an increased risk of further flooding in October and November. Off-season crop production is at or near harvesting stage in Juba Valley. Cereal prices throughout the south continued to drop between July and September, due to entry to the market of *Gu* cereal harvest and food aid distributions. Terms of trade (cereals to labour/livestock) also improved (page 3).

Livestock: In the south, cattle trade is increased due to the opening of the Garissa Livestock Market in September and the improved livestock body conditions in several areas. Cattle prices increased in Shabelle and Juba Valleys, but remained stable in other southern regions. Livestock body conditions continue to deteriorate in Hiran and Central regions, due to exhausted and depleting pasture and water conditions. In the northwest and northeast, livestock body conditions and prices continue to improve (page 4).

Markets: The opening of Mogadishu Port has led to an improved supply and decreased prices of imported commodities in Shabelle Valley. Many traders, as well as Humanitarian Agencies, are also benefiting from reduced handling costs and unloading time (page 4).

Nutrition: Findings of the Sool Plateau (August '06) and the Berdale District (September '06) nutrition assessments indicate that the nutrition situation in both areas has improved due primarily to improved dietary diversity. High morbidity levels and poor feeding practices, however, continue to negatively influence the nutrition situation in these areas (page 5).

Key Defining Issues and Implications for Response:

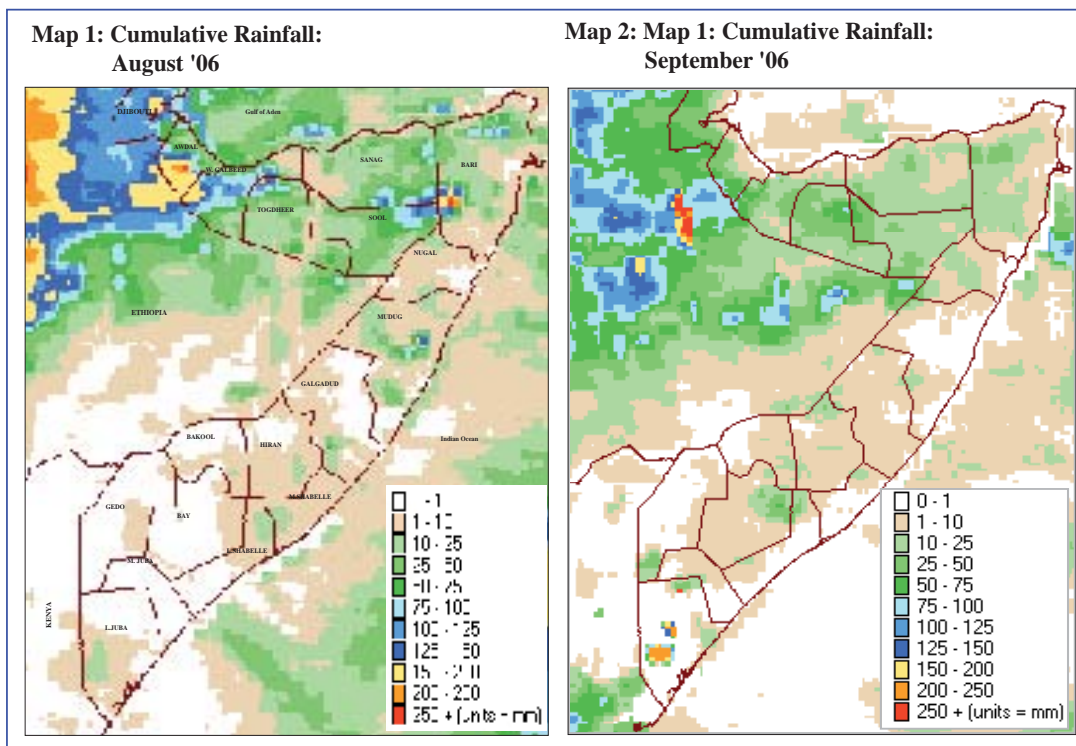
- **Early Warning for Floods in October and November**, due to already high river levels and forecasts for weak El Niño.
 - **Implications for Response:** Need for Increased Flood Preparedness and Flood Contingency Plans
- **Reconfirmation of previous early warning that, if wide spread conflict were to occur, the impact on the humanitarian crisis would be severe** and the number of people in need of humanitarian assistance could double
 - **Implications for Response:** Recommitment to and increased efforts for peace and conflict resolution by all national and international actors. Contingency Planning for this worse case scenario
- **Significantly Increased Population Displacement, within Somalia and across regional borders**
 - **Implications for Response:** Increased humanitarian response to cover adequately increased displaced population numbers
- **Shrinking 'humanitarian space' in areas of greatest need**
 - **Implications for Response:** Increased efforts and engagement to halt this trend and to improve humanitarian access
- **Need for continuing humanitarian assistance and livelihood support in areas identified in Humanitarian Emergency and Acute Food and Livelihood Crisis.**

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**SECTOR
HIGHLIGHTS**

climate/civil insecurity



Source: USGS/FEWS NET

CLIMATE

During the ongoing *Gu/Karan* rains (July-October) in the northwest were normal to above normal in August and September, particularly in Awdal, W. Galbeed, Golis, Guban, and the western part of Togdheer. Although satellite imagery for this period shows poor rainfall in W. Galbeed and parts of Togdheer (Map 1), field reports and rain gauge data confirm that rains were normal to above normal. The coastal *Hays* rains in northeastern areas are reported to be poor during August and September. There were moderate, unusual and fairly widespread rains in inland areas, including areas around Gardo, Golis, Gebi Valley, Erigavo, Nugal of Taleh, Jariban and Burtinle (Map 1). Moderate rains were received in parts of Iskushuban and Kandala, the Gagaab Pastoral area which was newly identified in a phase of Acute Food and Livelihood Crisis during the Post *Gu* Assessment.

In Central and Hiran regions, field reports confirm that light showers were only reported in localized areas, including 5-10 km vicinity around Belet Weyne town, and along coastal areas of Hobyo, Haradhere, and Ceel Dheere districts. In the South, during August and September, field reports confirm that the *Hagai* coastal rains were good along the coast, and even extended into inland areas of Shabelle and Juba Valley, reaching inland as far as Afmadow in Lower Juba. Moderate rains also fell in several parts of Bay region, while Bakool and Gedo received no rains during August and September.

Deyr rains, the second most important seasonal rains in the year, are expected to begin mid-October and run through mid-December. Already, in the first week of October, in some places field reports indicate that some light early rains have started, including parts of Bakool (Hudur, Wajid, and pockets of Tayeglow) and localized areas within Galgadud region. According to IGAD Climate Prediction and Application Centre (ICPAC), warmer than average Sea Surface Temperatures (SSTs) are projected over the central Indian Ocean and much of the Atlantic Ocean. These SST forecasts indicate the likely occurrence of neutral or weak El Nino conditions in the Greater Horn of Africa, which could translate into heavy rains and severe flooding in Juba and Shabelle Valleys.

CIVIL INSECURITY

As stated in previous early warning statements (FSAU Press Release, August 15, '06) and flagged in the Post *Gu* 2006 Integrated Phase Classification Projections for July – December (Map 5), if widespread conflict were to occur, the impact on the humanitarian situation of the entire Southern and Central regions would be severe, such that the 'total number of people facing humanitarian crisis could double'. Currently, the risk of widespread conflict is even greater than previous, as insecurity is growing and tensions are escalating.

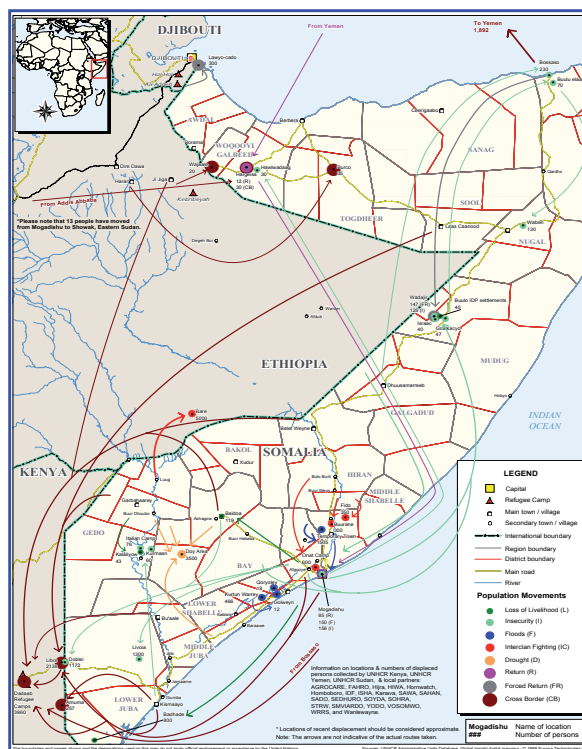
This heightened state of civil insecurity and tension is the result of the accumulated impact of a number of recent events, including the expansion of areas under the control of Union of Islamic Courts (UIC) (i.e. Lower and Middle Shabelle, Lower Juba, parts of Middle Juba, Hiran, parts of Galgadud and the southern part of Mudug), increased high level dialogue on the possibility of the deployment of regional peacekeeping forces (IGASOM), the assassination attempt of the TFG

President Abdullahi Yusuf by a suicide bomber, the assassination of an Italian nun in Mogadishu, the localized conflicts in several regions (i.e. Hiran, Juba, and Galgadud), the further reinforcement of division front lines in Hiran, Bay, Middle Juba, Galgadud (border with Ethiopia) and south Mudug, and the heightened tensions between Somaliland authorities and UIC.

In the last two months, there has been significant and increased population displacement within Somalia and across regional borders due to the fear of an outbreak of conflict. In areas under UIC control, although there has been a reduction of roadblocks, a general improvement in the security situation, and a consequent reduction in 'taxation', the fear of conflict continues to lead to population displacement. According to UNHCR Population Movement Tracking (Sept. '06), approximately 3,000 people crossed the border into Kenya in August and 6,255 crossed into Kenya in September. The majority of displaced people are coming from Mogadishu, Kismayo, Baidoa, Buale and Doble, while some are coming from Belet Weyne, Bosasso and Laas Caanod (Map 3).

Population displacement is occurring at a critical time for both agricultural and pastoral livelihoods: the period of land preparation for the coming *Deyr* season and livestock migration in search of *Hagai* or early *Deyr* rains. The UIC announced a ban on charcoal exports in areas under their control. In late August. This was welcomed by civil society groups, as the environmental impacts of charcoal production have been devastating in Somalia and its trade led to resource-based conflicts affecting negatively food and livelihood security. However, in the short-term this ban could negatively impact poor households who engage in charcoal production and trade as a survival coping strategy. Close monitoring of the impact on these households, especially in areas of Humanitarian Emergency and Acute Food and Livelihood Crisis is needed.

Map 3: Somalia - New displacement in September '06



Source: UNHCR Population Movement Tracking - Somalia

AGRICULTURE

In August and September '06, unusual average to good *Hagai* rains were received in most parts of Shabelle and Juba Valleys, which enhanced the conditions of late planted *Gu* cereal crops at standing stage and early *Deyr* stage established crops; these rains are also encouraging farmers to plant rainfed fields that were left fallow during the *Gu* '06 season. In Lower Shabelle, although preliminary and unconfirmed, the area of established crops is roughly estimated to be 35 to 40% of the normal total *Deyr* cropland.

The level of Shabelle River reached its full apex in the second half of August '06, which caused floods in Middle Shabelle (Jowhar) and down stream in Lower Shabelle (Kurtunwarey) due to heavy rains in Ethiopia highlands, poor structure of river banks and poor flood prevention gauges. The crops damaged by floods were in different stages, late *Gu* harvesting, late planted maize and sowing stage, as well as sesame crop. The impact of the floods on the crops has not yet been fully assessed; however, the scope of damage is roughly estimated at 1,000 – 1,500ha in Middle Shabelle and 400 – 500ha in Lower Shabelle, of *Gu* maize at harvest, early planted *Deyr* crops, and *Hagai* sesame.

Water levels of Shabelle and Juba rivers are still high, and if levels continue to remain high in combination with current climate predictions of a weak 'El Nino'(heavy rains) in the Greater Horn of Africa, means there is an elevated risk of more flooding, and possibly severe flooding in the coming weeks. Reports from upstream of both rivers indicate high and rising water levels and its normal to have floods in November, therefore, a flood impact crop assessment is premature at this time, as more floods are still imminent.

civil insecurity/agriculture

Figure 1: Regional Average Monthly Cereal Prices (US\$)

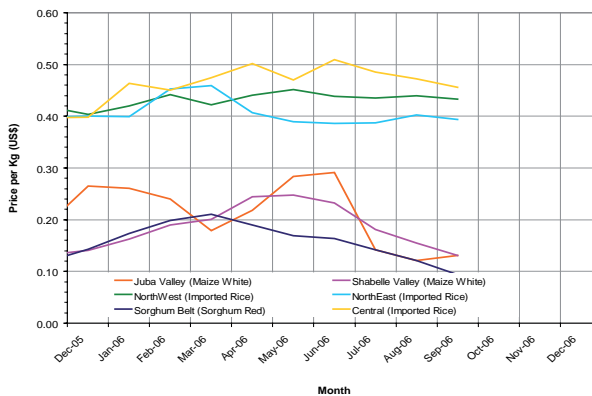
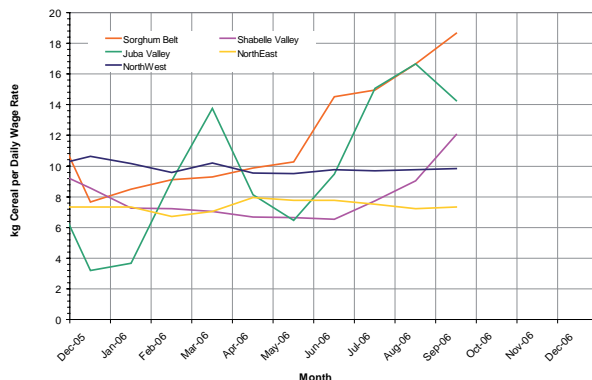


Figure 2: Regional Average Monthly Terms of Trade: Cereal to Labour



Off-season cereal production from the “*desheks*” in Juba Valley was roughly estimated at 3,200 MT in the Post Gu ‘06 assessment, which represents only 3% of *Gu* PWA with combination of *Gu* ‘06 cereal production. Standing off-season crops are in good condition, currently at flowering and harvesting stages. FSAU is planning to conduct an off-season crop harvest assessment from Oct. 14-27, if security and access allows. The *Karan* rains in the northwest were well distributed with good intensity; therefore, crop production is expected to be higher than crop establishment projections in the Post Gu ‘06. FSAU is planning to carry out a *Gu/Karan* post harvest crop assessment from Nov. 21 to Dec. 5.

In spite of poor *Gu* ‘06 cereal production, prices of maize dropped by 30% and 8% in Shabelle and Juba Valleys, respectively, and sorghum prices by 36% in Sorghum Belt between July and September 06, due to the entry of *Gu* ‘06 cereal production and relief food distributions into the main markets (Figure 1). However, maize prices increased by 8% in September in Juba Valley compared to August, due to smaller food aid distributions and limited supply of local cereals due to crop failure in *Gu* ‘06. Labour opportunities over the last two and half months were available due to the ongoing agricultural activities, such as harvesting, land preparation, and early planting. Therefore, there is an improvement in terms of trade (labour/cereals) between July and September 06, due to improved labour opportunities and decreased cereal prices. Terms of trade (cereal/labour) increased significantly from July ‘06 to Sept. ‘06 in Shabelle Valley and the Sorghum Belt, by 56% and 25%, respectively. On the other hand, terms of trade in Juba Valley during the same time declined by 5%, due to increased cereal prices (See Figure 2).

LIVESTOCK

In the South good *Hagai* rains fell in August and September ‘06 in Shabelle and Juba Valleys and most parts of Bay region, improving pasture and water availability. As a result livestock body conditions improved and the availability of camel milk increased. Gedo and Bakool regions did not receive *Hagai* rains, which lead to a further reduction in pasture and water. There is no unusual migration from Gedo and Bakool, but livestock body conditions are weakening and there is less camel milk availability.

In the Southern regions, cattle trade is increasing due to the opening of the Garissa Livestock Market in September and improved livestock body conditions in some areas. This is contributing to improved purchasing power of households. In Juba and Shabelle Valleys, cattle prices increased by 15-30% in September ‘06 compared to July ‘06 (Figure 3). However, in most markets in Gedo, Bakool, Bay and Hiran, cattle prices remained stable over this same period. Terms of trade (livestock to cereals) is improved in most markets, due to declining cereal prices (Figure 1). In areas of increased cattle prices (combined with reduced cereal prices), such as Juba and Shabelle Valley the gains in terms of trade are greater.

Livestock body conditions in Hiran and Central are continuing to deteriorate due to exhausted and depleting pasture and water conditions, with limited milk availability and increased water prices (increased 35-80% of normal, i.e. 1.4USD/barrel). Internal livestock movement in the Central regions and out-migration from Hiran to Shabelle Valley for pasture and water is unreasonably high. On the positive side, the demand for export goats is high due to Ramadan/Hajj, which has led to an increase in export goat prices of 18% in Sept. ‘06 compared to July ‘06, and increased terms of trade by 20% for the same period.

In northwest and northeast regions, livestock body conditions improved and camel milk production increased in the areas that received good *Karan* and *Hagai* rains, as a result of sufficient pasture and water availability. Also as a result of these rains, pastoralists from Hawd of Hargeisa who had previously moved to Zone V of Ethiopia, returned to their traditional grazing areas. Export goat/sheep prices increased by 16% in September ‘06 as compared to July ‘06 and terms of trade of goat to imported cereal increased by 18% in northwest and 21% in northeast. Livestock exports are expected to increase significantly from October to December, in response to the high demand season of the Hajj.

MARKETS

The Somali Shilling appreciated against the US dollar at 6% in September as compared to August in Mogadishu, but remained fairly stable in other markets (Baidoa, Galkayo, and Bossaso). The Somaliland Shilling appreciated against the US dollar at 1% during the same period. The opening of the Mogadishu seaport and the reduction of road blocks and tariffs in Shabelle Valley has led to the improved supply of imported commodities, as well as decreased prices in Shabelle Valley (Figure 4). Import commodity prices of red rice, sugar, and vegetable oil fell by 12%, 9%, and 5%, respectively, between August and September. Prices of imported commodities in other regions remained stable and high during this period (FSAU Market Update, Sept. ‘06).

Figure 3: Regional Average Monthly Prices Local Quality Cattle (US\$)

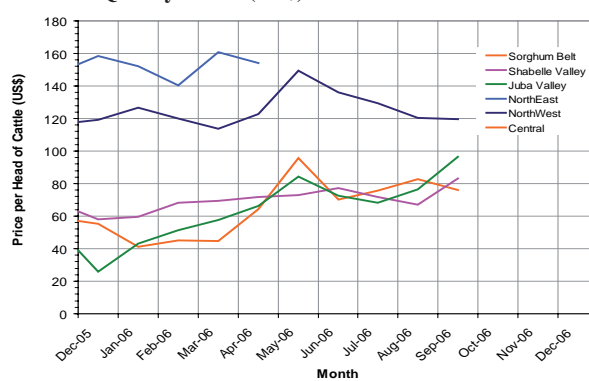
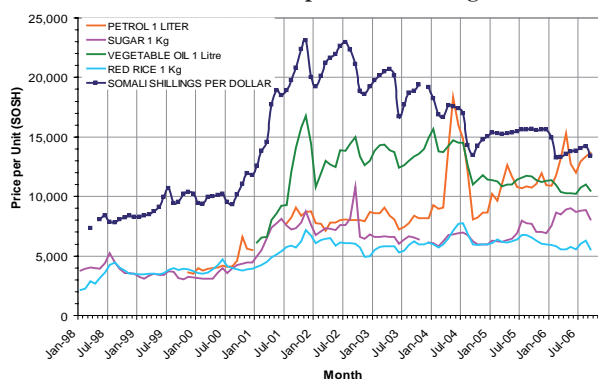


Figure 4: Shabelle Valley: Trend in Imported Commodity Prices compared to Exchange Rate



Many traders, as well as Humanitarian Agencies, are benefiting from reduced operation costs and unloading time, as a result of the opening of the Mogadishu Port. Previously, many traders were using small hardboard (Elmain) boats. Cranes were used to unload the commodities from the vessel onto smaller barges, and then they were ferried to the shallow seas, where porters waited to wade ashore with the bags and then load them onto lorries. This time-consuming operation resulted in high operation costs, which were then transferred to consumers through higher commodity prices.

Unless widespread conflict arises, it is expected that with the full operation of the Mogadishu Port, imported commodity prices would continue their moderate decline in Shabelle Valley, as well as in other regions served by this port.

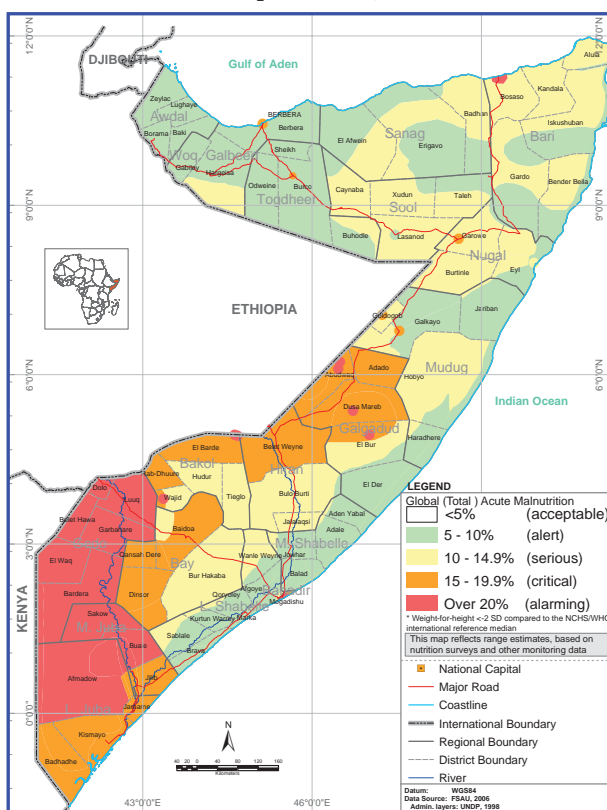
NUTRITION

Findings from the Sool Plateau assessment (August 2006) indicate global acute malnutrition (Weight-for-Height <-2 z scores or oedema) of 9.0% (CI: 7.3 – 11.0) and severe acute malnutrition of 0.7% (CI: 0.3- 1.6). This signifies an alert nutrition situation (FSAU, WHO), but an improvement compared to the long term levels (10-14.9%) for the area. The retrospective crude mortality rate (CMR) of 0.54 (CI: 0.40- 0.69), is acceptable according to WHO standards.

The Berdale district nutrition assessment (September 2006) indicates global acute malnutrition (weight for height <-2 Z score or oedema) of 11% (CI: 9.5-13.6) and severe acute malnutrition (weight for height <-3 Z score or oedema) of 2.6% (CI: 1.8-3.9). The results indicate a serious nutrition situation (WHO classification), but is an improvement above the long-term estimates (15-19.9%) of acute malnutrition for the district. The retrospective crude mortality rate is 1.28 (0.96-1.61).

The improved nutrition situation in Sool Plateau and Berdale is attributed to dietary diversity, with the majority of households consuming four or more food groups. High morbidity levels (36% in Sool Plateau and 29.5% in Berdale) and poor child feeding practices continue to negatively influence the nutrition status.

Map 4: Somalia - Current Range Estimates of Malnutrition September 21, '06



markets/nutrition/regional highlights

REGIONAL HIGHLIGHTS

SOUTHERN REGION

Juba and Shabelle Valley received good *Hagai* rains in August and September, especially in coastal areas. Rains, however, are also reported to have extended into inland areas and reached as far as southern Afmadow and Jilib in Juba, and parts of Bay Region. In areas that received rains, water, pasture and grazing conditions improved, leading to further improvements in livestock body conditions, production, and market values. No new livestock in-migration is reported, but internal migration (both local and the old in-migrated pastoralists) into the improved pasture-grazing areas is high. Livestock density per unit area is still high and concentrated along desheks (Juba) and riverine areas, which is continuing to increase the risk of resource-based conflict and disease outbreaks. Early *Deyr* rains were reported in Bakool in the first Dakad of October.

In August, an estimated 400-500ha of *Gu* off-season standing maize and sesame crops were destroyed by floods in Kurtunwarey district and an estimated 1,000-1,500 ha in Jowhar district of Lower and Middle Shabelle Regions respectively. Off-season crops in Juba Valley are in good condition and FSAU is planning to undertake an off-season post harvest crop assessment in October.

In Gedo, Bay and Bakool and Juba Valley regions the price of sorghum decreased between July and September; similarly, in Shabelle Valley the price of maize also decreased during the same period. These reductions are attributed to the release of the *Gu* '06 cereal harvest and food aid distributed by humanitarian agencies. However, in Juba Valley, maize prices increased by 8% in September compared to August, due to low market availability of local production and decreased food aid distributions.

The decrease in cereal prices and increase in the market value of livestock has led to a significant improvement in terms of trade (local quality goat to cereal); an increase of 79%, 53% and 30% respectively in the Sorghum Belt, Shabelle and Juba Valleys, in September compared to July.

HIRAN AND CENTRAL

In Hiran region, unusual localized rains in mid-September were reported in a 5-10 km vicinity around Belet Weyne town. These rains, however, had a negligible impact on rangeland and crop productivity, with rainfed crop and livestock conditions continuing to deteriorate, particularly for southern agro-pastoralists in Jalalaqsi district. This has led to continuing migration of cattle from Jalalaqsi and Bulo Burti districts to the Shabelle Valley.

In the riverine areas of Hiran, pump irrigation activities (for fruit, vegetable and sesame cash crops and fodder) have been helped by a reduction in the price of fuel (diesel) by 12% since August. Due to the poor *Gu* '06 harvest, household cereal stocks of locally produced red sorghum are low, increasing reliance on market purchases.

During September, there was no red sorghum available in the markets; therefore, households were forced to substitute sorghum with the less preferred maize. The price of cereals is now largely determined by the availability of commercial imports, food aid, and cereal supply from other regions, such as maize from the Shabelle Valley. Field reports indicate that in Belet Weyne, the price of maize declined by 17% between July and September due to food aid distributions. Since there is no price stabilization effect from local production, it is expected that cereal prices will increase until the next harvest affecting negatively terms of trade for poor and middle wealth groups.

Pockets in the coastal plains of Ceel Dheere, Hararadheere and Hobyo also received light *Hays* showers in September, improving grazing and water conditions there. However, most of central regions remained dry over the last two months, and pasture and water conditions are continuing to deteriorate. Extensive water trucking is ongoing and prices are 35-80% higher than normal (1.4 USD/200 litre barrel). This is further burdening households and increasing debt levels, especially for those who are already identified in a phase of Acute Food and Livelihood Crisis. On the positive side, terms of trade (livestock/cereal) have improved by 26% from July to September, due to a 5% decrease in the price of imported rice and a 22% increase in the price of export quality goats.

NORTHERN REGION

Ongoing *Karan* rains in the northwest and rains in inland areas in the northeast have regenerated pasture, increased water availability and improved livestock body conditions. These rains have particularly benefited pastoralists in the newly identified **Acute Food and Livelihood Crisis** areas of Alula, Kandala and Iskushuban in the northeast (Map 5). However, most parts of Mudug, parts of Sool plateau (*Sool region*), and Nugal region remain dry, with deteriorating pasture and/or water conditions which is further triggering high internal livestock movements. Along coastal areas of the northeast, the *Hays* rains are also reported to be poor. In the northwest, the *Karan* rains have not only improved rangeland conditions, but have improved *Gu/Karan* crop production prospects in agro-pastoral areas.

The purchasing power of pastoralists, throughout the north, has generally improved as indicated by increased terms of trade between export quality goat and imported cereals, 18% and 21% between July and Sept. for northwest and northeast, respectively. Purchasing power is expected to improve further in the next two months due to the peak export demand season of the Hajj. In addition, seasonal fishing activities (lobster and fish) in the northeast restarted in September, following the end of the monsoon tides (June-August). The increased fishing opportunities will provide diversified and improved income opportunities, not only for coastal communities, but also for neighbouring inland poor pastoralists, particularly benefiting areas in **Acute Food and Livelihood Crisis**.

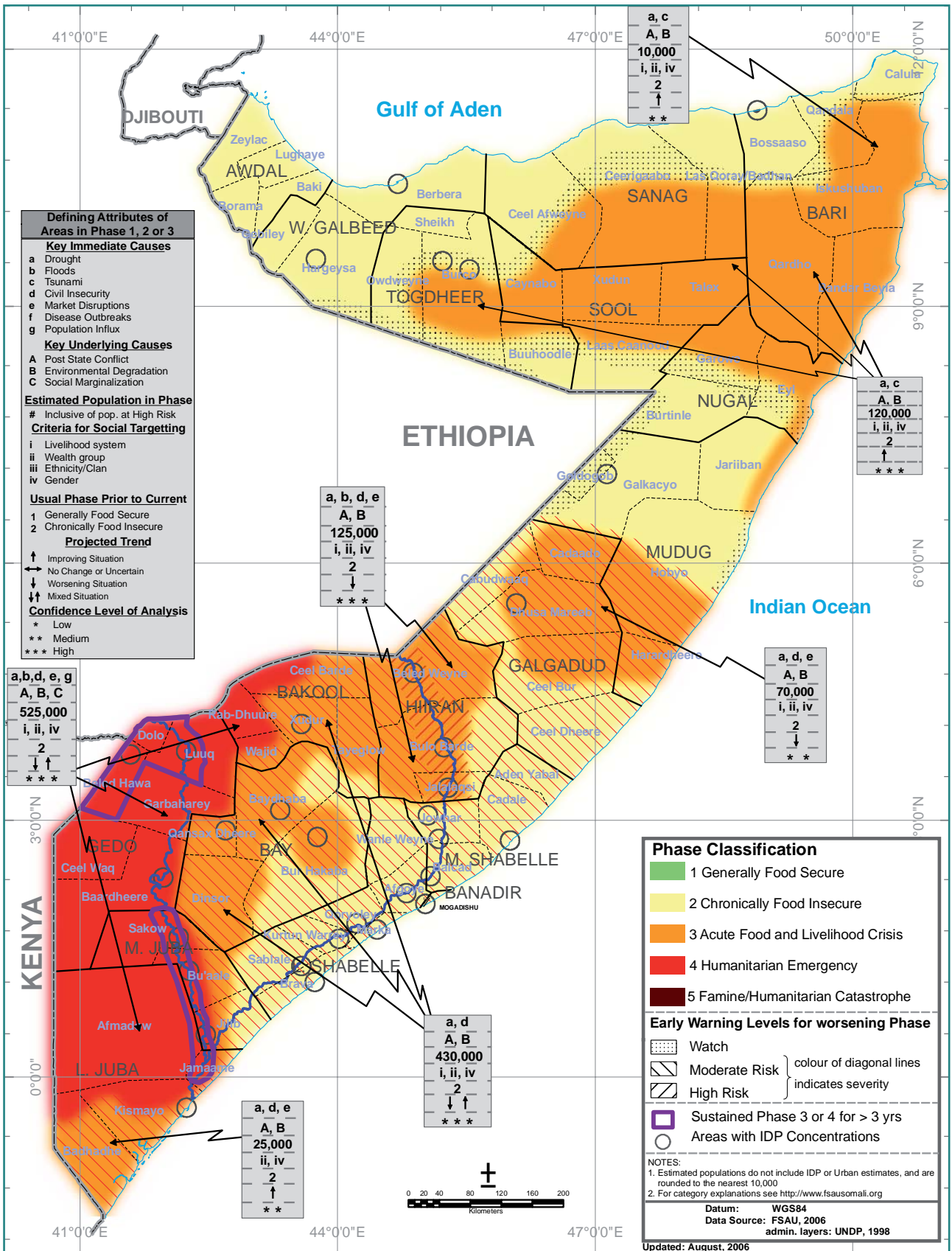
Field reports indicate that, in the last few weeks, there has been resumption in trade and commodity flows due to the improved security situation. Increasing tensions between the UIC and the newly formed Galmudug Administration in August and September previously led to disruptions in trade and population displacement.

Recent and forthcoming publications and releases

FSAU Nutrition Update, September, 2006
FSAU/FEWSNET Market Data Update, October 2006
FSAU/FEWSNET Climate Data Update, October 2006
FSAU Technical Series 2006 Post Gu Analysis, September 2006
FSAU Press Release, August 15, 2006
Sool Plateau Nutrition Assessment Report, October '06
Berdalle Nutrition Assessment Report, October '06
EC Press Release, September 15, 2006: EC Supports Food Security and Livelihood Monitoring in Somalia through FSAU.

NOTE: The above publications and releases are available on the FSAU website: www.fsasomali.org

Map 5: Somalia Food Security Situation Analysis: Post Gu Projection, July-December '06



phase classification map

Technical & Managerial Support



Funding Agencies



Technical Partners

