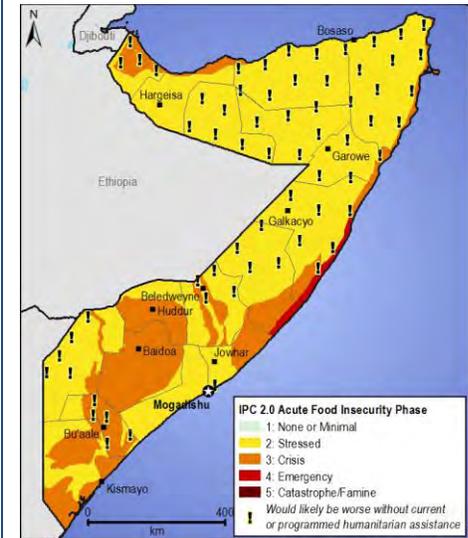


Off-season harvest in September very poor due to poor Hagaa rains

KEY MESSAGES

- Due to the poor *Gu* harvest in July, the very poor off-season harvest in September, rising prices, and continued **Very Critical** nutrition situation, an estimated 2.12 million people will remain in a food security Crisis (IPC Phase 3 or higher) through December 2012. Agropastoral areas of southern Somalia remain in Crisis (IPC Phase 3) following the poor *Gu* season.
- Average to above average October to December *Deyr* rains are expected and input supply is expected to be moderately above usual. The *Deyr* crop harvest in southern Somalia should be near average to above average. There may be delays in the harvest due to flooding. However, flooded areas will likely practice recession cultivation and eventually have a harvest, but it may be as late as in March.
- Expected intensified conflict in Gedo, Bakol, and Lower and Middle Juba and Shabelle Regions will likely reduce planting and crop production and disrupt livestock migration patterns, population movements, and market supplies. The conflict will likely result in increased numbers of internally displaced persons (IDPs) and refugees, and will limit both trade and humanitarian access, resulting in escalating food insecurity.
- Forecasted average to above average October to December *Deyr* rains are likely to lead to flooding along the Shabelle and Juba Rivers. The Shabelle River already flooded around Beledweyne in Hirán Region in early October. As the riverine *Deyr* harvest will likely be below average and delayed by localized flooding, poor riverine households are projected to be in Crisis (IPC Phase 3) from January to March 2013.

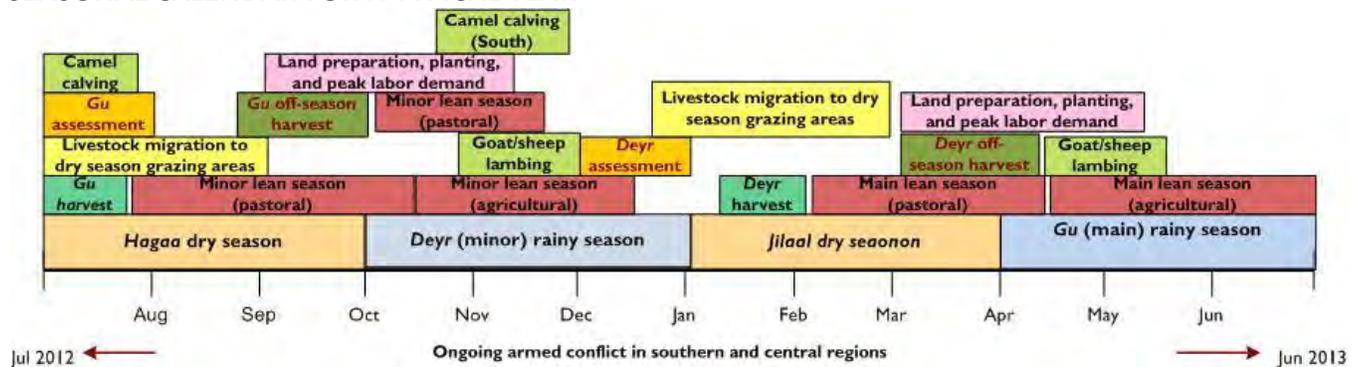
Figure 1. Current food security outcomes, October 2012



Source: FSNAU/FEWS NET Somalia

This map represents acute food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect chronic food insecurity. Visit www.fews.net/FoodInsecurity/Scale for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET Somalia

Figure 2. Projected food security outcomes, October to December 2012

NATIONAL OVERVIEW

Current Situation

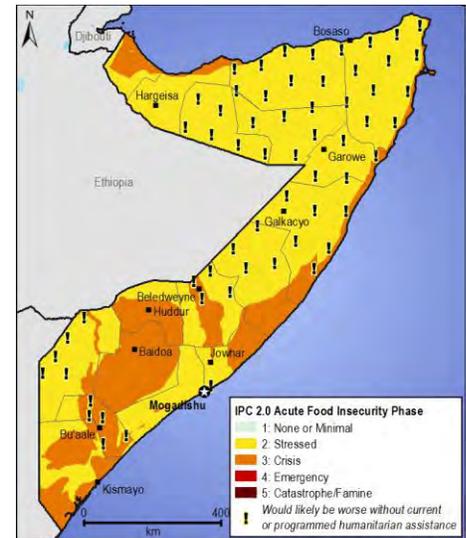
Based on the Food Security and Nutrition Analysis Unit-Somalia’s (FSNAU), FEWS NET’s, and partners’ joint assessment and analysis in July and August, 2.085 million people were food insecure in Somalia in July, and 2.12 million people were projected to be food insecure from August to December 2012.

The July to September *Hagaa* rains in the South were significantly below average. In some areas, it did not rain at all. The rain failure caused off-season staple crops to wilt and die in most areas. Only 30 percent of the planted area for off-season cereals were harvested in Lower and Middle Shabelle and Juba Regions.

Currently, dry pasture is available and accessible in most pastoral livelihood zones, resulting in average livestock body conditions. Exceptions with poor pasture conditions to this include Guban pastoral livelihood zone in the Northwest and the Coastal *Deeh* livelihood zone along the Indian Ocean coast. Seasonal livestock migration has been occurring in primarily usual patterns. However, livestock concentration has occurred in remote *barkad*-dependent areas of Sool, Sanag, and the Nugal Valley. August water prices, particularly in Sool, increased by 36 and 9 percent compared to last year and the five-year average, respectively. Despite water shortages in these areas, the dry pasture conditions remain sufficient, and income from livestock sales has increased since the beginning of 2012. Livestock prices in these livelihoods are above last year and the five-year average. Staple food prices have declined, mainly starting in March, hence improving access to food. Milk availability remains below average in all livelihood zones due to reduced cow milk and limited camel milk availability, as it has been during all of 2012. So far, during the October to December *Deyr* rainy season, especially heavy rains fell in Hiran, in some parts of the central regions, and in the lowlands of Hawd pastoral livelihood zone in the Northwest. Due to heavy rains in Ethiopia in areas which feed the Shabelle River and local torrential rains from thunderstorms, flash floods and river flooding along the Shabelle have occurred in Hiran including in Beledweyne.

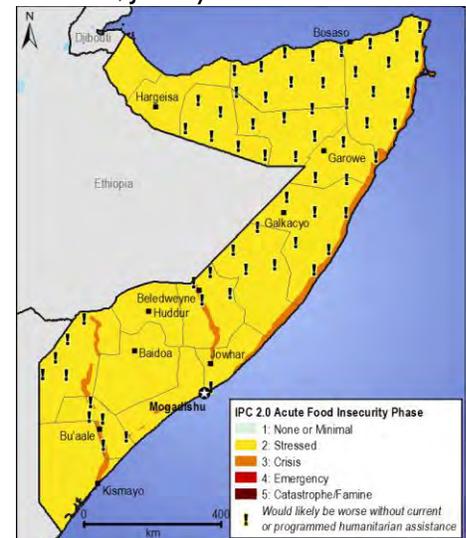
Prices of sorghum in the sorghum belt in Bay, Gedo, Bakol, and Hiran Regions have increased from June 2012 to August 2012. Maize prices in Middle and Lower Juba increased from June 2012 to August 2012. The increases are atypical and not along the seasonal trend, indicating more limited stocks than usual at this point in the year. The imported red rice prices in the South are increasing due to a seasonal supply decrease that occurs when the monsoon winds close some of the smaller ports, but in the Northeast and the Northwest, prices of imported red rice have remained stable since March. Livestock prices are high as is seasonally normal in September due to high demand for exports before and during the Hajj season.

According to the FSNAU’s post-*Gu* nutrition surveys and health information systems (HIS) data from June and July, the nutrition situation improved since December 2011 due to increased purchasing power, improved livestock productivity, and sustained humanitarian support. However, some areas had relatively poorer nutritional outcomes including the coastal strip of West Golis and Guban in the Northwest, the Coastal *Deeh* livelihood zone in the North and the central regions, the cowpea belt (central agropastoral) livelihood zone, Bay Region, and parts of Gedo and Middle and Lower Juba Regions. The nutrition situation as classified using the FSNAU nutrition situation categorization framework in the Hawd pastoral livelihood zone of the Northwest, in the Nugal Valley livelihood zone, and in west Golis and Guban pastoral livelihood zones



Source: FEWS NET Somalia

Figure 3. Projected food security outcomes, January to March 2013



Source: FEWS NET Somalia; These maps represent acute food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect chronic food insecurity. Visit www.fews.net/IPC for more on this scale.

deteriorated from **Critical** or **Serious** in December 2011 to the **Very Critical** level in June and July. Some of the deterioration can be attributed to seasonal factors and patterns.

Assumptions

The October 2012 to March 2013 outlook is based on the following, national-level assumptions:

Agroclimatology

- With continued likelihood of a mild El Niño starting between now and December and sea surface temperatures (SSTs) in the Indian Ocean remaining favorable for continuing rain in the eastern Horn of Africa, the October to December *Deyr* rains are likely to be average to above average in terms of total amounts. However, they are unlikely to be evenly spatially distributed as the *Deyr* is typically poorly distributed with some areas receiving more rain than others. The rains have had a near normal onset, and they are expected to peak in November and December.
- Further flooding in riverine livelihood zones and in agropastoral areas of Lower and Middle Shabelle and Juba Regions is likely from October to December. During the mild El Niño of the 2006 to 2007 *Deyr*, river floods reached some agropastoral areas of Lower and Middle Shabelle, Lower and Middle Juba, and Gedo Regions.
- As flood water recede, recession cultivation will be practiced, but this will delay some areas from harvesting considerably, expecting to push back some of the *Deyr* harvest from January to as late as March.
- Near average December to February *Hays* rains are likely to relieve drought conditions in areas of the Northwest along the Gulf of Aden, effectively ending the drought in Guban pastoral livelihood zone.

Agricultural labor

- Demand for agricultural labor will be seasonally normal with high demand for land preparation and weeding for the *Deyr* season in October and November. Agricultural labor wage rates will increase in October and November due to high agricultural labor demand.
- Agricultural input provision, including offering of free seeds and of tools by humanitarian partners are expected to increase area planted in non-flooded, agropastoral areas of the South.

Livestock

- Overall, milk availability will increase both for household consumption and sale due to the expected camel calving. Average camel calving in November and December along with seasonal in-migration of livestock closer to settlements will improve household access to milk. Cow milk availability, however, will decline from October to March.
- Due to poor cattle conceptions during the April to June *Gu* rains, high conception rates for cattle are expected during the October to December *Deyr* rains. However, the resulting calving would not start until July 2013.
- Livestock prices across the country will seasonally increase in October for the peak demand for Hajj exports to the Middle East. However, after October, prices and total exports will decline through March in their normal seasonal pattern, but prices are not expected to decline to particularly low levels.

Markets and trade

- Local cereal prices will likely increase from now until December due to the seasonal price rise during the October to December agricultural lean season, the below average 2012 *Gu* harvest, and the poor off-season harvest in September. However, prices are highly unlikely to approach their peaks from 2011. Local cereal prices will likely peak in November before green consumption of *Deyr* crops begins in December. Prices of the locally produced cereals are likely to decline from January through March 2013 after fresh supplies from the *Deyr* harvest enter the market.
- The Somali shilling (SOS) is likely to continue to very slightly appreciate against foreign currencies due to continued growth of the economy of Mogadishu and other inward investments. The Somaliland shilling (SLSH) is unlikely to significantly depreciate as foreign currency earnings in the Somaliland shilling-using zone of the Northwest peak during the livestock export period in September and October that precedes the Hajj.
- International rice prices are likely to remain relatively stable. Prospects for rice in international markets have improved over the past several months as yields have increased in the U.S. and India. Late season monsoon rains in August have improved both the prospects of the September to January *khariif* rice harvest in India and have provided moisture for

land preparation and planting for the April and May *rabi* harvest in both India and Pakistan. Imported rice prices in Somalia will likely continue to be relatively stable.

Conflict:

- Intensified conflict in Gedo, Bakol, and Lower and Middle Juba and Shabelle Regions will likely reduce planting and crop production and disrupt typical livestock migration patterns, population movements, and market supplies. The conflict will likely result in increased numbers of internally displaced persons (IDPs) and refugees, and will limit both trade and humanitarian access in southwestern Somalia.
- Conflict will limit cross-border trade both with Kenya and with Ethiopia through at least March.

Humanitarian assistance

- In central and southern Somalia, humanitarian access will be reduced as insecurity and fighting increases. However, humanitarian assistance is expected to increase between January and March in the areas of the South which are newly under the control of the Government of Somalia and the African Union Mission in Somalia (AMISOM).
- Humanitarian support may increase in some areas of the North, particularly in Sanag, Bari, and Woqooyi Galbeed Regions, which are relatively more secure and accessible to humanitarian agencies.

Most Likely Food Security Outcomes

Due to the poor and significantly below average *Gu* 2012 crop harvest, the very poor *Hagaa* season in the South, atypical cereal price increases, food security outcomes in Somalia still remain precarious. An estimated 2.12 million people will remain in a food security Crisis (IPC Phase 3 or higher) through December 2012. However, as average to above average October to December *Deyr* rains are expected and input supply is expected to be moderately above usual, the *Deyr* crop harvest in southern Somalia should be near average to above average. There may be delays in the harvest due to flooding. However, flooded areas will likely practice recession cultivation and eventually have a harvest, but it may be as late as in March. Flooding risk remains high, so riverine areas will likely have a slightly below average harvest due to flood damage and delay of some cultivation into the off-season in April or May. Agropastoral and pastoral areas will generally be Stressed (IPC Phase 2) from January to March, but due to the flooding and associated delays, many riverine areas will remain in Crisis (IPC Phase 3) for the January to March period.

Expected improved camel milk availability and reduced cereal prices after December will improve food security in pastoral and agropastoral areas from January through March 2013. Nevertheless, due to possible river flooding and flash floods, the riverine livelihood zones will have deteriorating food access through March. In the North, the *Gu* and *Karan* season harvest takes place starting in October, and this cereal harvest is likely to be both above the post-war (15-year) average and the five-year average due to average to above average June to September *Karan* rains.

Nutrition Outcomes

- In the South, the projected nutrition situation to December 2012 is likely to remain **Critical** to **Very Critical** as classified using the FSNAU nutrition situation categorization framework.
- In the North, the situation is likely to remain unchanged from October to December across all rural livelihood zones except for West Golis-Guban pastoral livelihood zone and the Nugal Valley pastoral livelihood zone where it is projected to improve to **Critical**.
- Waterborne disease incidence is likely to increase from October to December due to floods mainly in riverine areas and nearby agropastoral areas.

AREAS OF CONCERN

Agropastoral livelihood zones in Gedo and Lower and Middle Juba Regions

Current Situation

The July to September *Hagaa* rains failed in most of the southern agropastoral livelihood zones of Gedo and Middle Juba. They were generally poor and erratic in terms of amount, timing, and spatial distribution in Lower Juba. The off-season crop harvest that was expected in September wilted due to severe moisture stress.

In Gedo region, the regional average water prices were 140 and 137 percent above six months ago and last year, respectively. However, in Lower and Middle Juba, the Juba Valley trade basin average for water prices only marginally increased by four and eight percent from six months ago and last year, respectively. Reduced pasture availability around water sources areas has extended trekking distances for pasture and water.

Despite high water prices in some areas and poor rainfall conditions, a medium rate of cattle calving was reported in July and a high kidding and lambing rate was reported during March and April due to the high number of conceptions at the end of the 2011 to 2012 *Deyr* season in December and January. Births have increased livestock holdings at the household level, improved milk consumption, and increased milk and livestock sales.

In August, the Juba Valley trade basin average cow milk price decreased by 13 percent compared to July, and the price was seven percent higher than last year. The August camel milk price increased by two percent from July and decreased by 14 percent over the last six months, but August prices were still 31 percent higher than at the same time last year. In Gedo, cow milk prices were unchanged in August compare to July, but they were 23 percent higher than March 2012. They were nine percent lower than same time last year. In Gedo, the regional average camel milk price increased by five, 41, and seven percent compared to July, March, and last year, respectively.

In August, local quality goat prices in all agropastoral areas of Gedo and Lower and Middle Juba had increased between nine and 55 percent since March 2012. The prices were lower in Gedo, and higher in Middle and Lower Juba. The local goat price was also higher than the five-year average by 80 and 113 percent in Middle and Lower Juba and Gedo, respectively. Livestock prices are following the seasonal, increasing trend due to the Hajj export period which will raise the income of agropastoral households in Gedo and Middle and Lower Juba who are able to sell some small stock to traders.

Locally produced staples including sorghum and maize started increasing in price in May this year, atypically rising unlike the usual seasonal pattern of decreases between July and August. However, cereal prices are still lower than prices from last year or five-year average (Figure 4). Below average cereal prices are partially a result of the incredibly high 2011 cereal prices pulling up the five-year averages.

Due to lack of their own cereal stocks from the *Gu*, households are currently depending on food purchases. Marketing of cereals and of livestock have been curtailed by insecurity, especially in Middle and Lower Juba where key roads have been blocked by armed groups. Despite these limiting factors, agricultural land preparation has already started in most of the agropastoral areas, and the moderate increase in labor opportunities has improved incomes from labor. However, income from cash crop production significantly declined compared to the previous *Deyr* season in January and February 2012 due to the poor *Hagaa* harvest in September. This has reduced households' purchasing power.

Figure 4: Food commodity prices, regional averages, August 2012

Commodity	Middle and Lower Juba			
	Price in SOS/kg or liter	Percentage change from March 2012	Percentage change from July 2012	Percentage change from August 2011
Red sorghum	6,500	N/A	N/A	N/A
White maize	9,535	6	-3	-49
Imported rice	18,035	3	-9	-27
Wheat flour	17,142	4	-6	-32
Sugar	22,857	-1	-1	-38
Vegetable oil	37,500	5	-1	-35
	Gedo			
Red sorghum	9,050	28	1	-51
White maize	10,000	29	3	-43
Imported rice	20,600	-3	-6	-31
Wheat flour	19,200	-6	-5	-25
Sugar	23,200	-3	-4	-37
Vegetable oil	48,000	4	4	-3

Source: FSNAU and FEWS NET Somalia

Purchasing power measured by the terms of trade (ToT) between the Gedo regional average local quality goat and locally produced cereals decreased in August by eight percent compared to March 2012 with one local quality goat in August worth 125 kilograms (kg) of cereal. The terms of trade in August were 67 percent higher than the five-year average. The labor wage rate in Gedo in August was 26 percent lower than six months before, falling from one day of labor earning the equivalent of 22 kg of cereal to one day of labor earning the equivalent of 15 kg of cereal. In Middle and Lower Juba, the labor wage rate increased from March to August by 11 percent, from one day of labor being the equivalent of nine kg of cereal to being the equivalent of 10 kg of cereal.

Large-scale conflict and fighting are ongoing in Gedo and Lower and Middle Juba, limiting humanitarian assistance and decreasing market supplies. Humanitarian assistance is minimal in agropastoral areas of Gedo and Middle and Lower Juba, and humanitarian access is incredibly limited in Lower and Middle Juba.

With low milk availability and no cereal stocks remaining from their own production from the January to March harvest, poor households are relying on market purchases of food funded, primarily, by selling livestock. The debt level of poor households remains high across the southern, agropastoral regions. Poor households are carrying debts estimated to be around USD 100 to USD 200. In addition, the results of the recent nutrition survey by FSNAU in July found very high malnutrition rates. In agropastoral areas of Gedo and Lower and Middle Juba, the survey found the global acute malnutrition (GAM) rate was 25.1 percent (with a 95 percent confidence interval (CI) of 22.2-28.3), and the severe acute malnutrition (SAM) rate was 5.8 percent (CI 4.4- 7.7). In Gedo Region, no survey was conducted due to insecurity, however, the health information system (HIS) data suggests that the child malnutrition rate was greater than 30 percent but had decreased over the last six months. These areas were classified **Likely Very Critical** by FSNAU and partners. In agropastoral areas of Middle and Lower Juba, the crude death rate (CDR) was 0.25 per every 10,000 persons per day (CI 0.07-0.88). The under-five death rate (<5DR) was 0.85 per 10,000 under-five children per day (CI 0.41-1.78), but there were suspected measles cases in Juba agropastoral areas. Based on these factors, coupled with intensified insecurity and limited humanitarian assistance, poor households have significant food consumption gaps, so they are in Crisis (IPC Phase 3).

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about agropastoral areas in Gedo, Middle Juba, and Lower Juba:

- Increased insecurity and intensified armed clashes will lead to losses of life and assets as the Government of Somalia supported by AMISOM tries to capture and retain control over Kismayo and Bardhera.
- Humanitarian access is expected to decline due to increasing clashes between armed group and the Kenya Defense Forces (KDF) supporting AMISOM and the Government of Somalia.
- Trader movement will be reduced due to increased conflict. Cereal supplies in local markets will decrease, and prices will increase due to the reduced volume of trade.
- Displacement will increase, primarily due to intensified conflict in Lower and Middle Juba and Gedo, leading to increasing numbers of IDPs and refugees.

Most Likely Food Security Outcomes

Agropastoral areas in Gedo Region are more livestock-dependent than crop-dependent, so milk availability and favorable livestock prices will allow poor households to access food. These areas will improve from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) for the October to December period. However, the poorer half of the poor households will remain in Crisis (IPC Phase 3) between October and December. Agropastoral areas in Middle and Lower Juba are more crop-dependent than livestock-dependent, and these areas will likely have more disruptions to trade from conflict and flooding. Disease outbreaks including malaria and diarrhea are also most likely. Thus, these areas will likely remain in Crisis (IPC Phase 3) through December.

Between January and March 2013, agropastoralists in both Juba and Gedo are expected to access their own crop production from *Deyr* crops. This will cover a substantial amount of consumption starting with green consumption in

December. Poor households will receive *zakat* from better off and middle income households. Camel milk availability is expected to be stable from January to March. Small ruminants' kidding and lambing are expected to increase in November, increasing milk access at household level. Cereal prices are expected to decline following the *Deyr* harvest in January, and most of the poor households will access at least four food groups out of 12 from January to March. As poor households' access to food improves, their food security will improve to Stressed (IPC Phase 2) throughout the agropastoral areas.

Bay and Bakol Agropastoral Livelihood Zones

Current Situations

In high-potential agropastoral areas of Bay, the lack of July and August *Hagaa* rains caused the failure of much of the late planted grain crop that was expected to be harvested in September during the off-season. Unusually, moderate rains fell during the fourth week of September which replenished water catchments. Dry grass is available in Bay and Bakol, resulting in average livestock body conditions. Medium cattle calving was reported in July, and the nursing animals sustained both households' milk consumption and milk sales. However, milk availability started to decline from August. Household cereal stocks have declined since the 2011-12 *Deyr* harvest in January and February, so poor households currently are purchasing staples from the market. With decreasing cattle and camel milk production, the poor are selling less milk, which has decreased their income. Also, social support remains limited, further limiting the purchasing power of the poor. As is seasonally typical, land preparation for the *Deyr* season has already started, so income from agricultural labor wages has started to resume.

In markets in Bay and Bakol serving agropastoral areas, water prices slightly increased from July to August by between one and 11 percent, but water in August remained nine to 19 percent lower than last year. In Bay in August, local sorghum and maize prices increased by 20 and 47 percent, respectively, compared to six months before. However sorghum and maize prices remain significantly lower, by between 60 and 70 percent than last year across Bay region. In Bakol, local sorghum and maize prices increased by 52 and 40 percent, respectively, compared to March 2012. In August in Bakol, the regional average sorghum prices were 26 percent lower than last year.

In Bay in August, the regional average was that each local quality goat was worth 403 kg of red sorghum, and generally terms of trade have been relatively stable since the beginning of the year. However, the terms of trade between a local quality goat and red sorghum in August were 908 percent higher than in August 2011. In Bakol in August, the regional average for one local quality goat sold was the equivalent of 128 kg of red sorghum. The August local quality goat to red sorghum terms of trade decreased by 12 and 23 percent since July and March, respectively, but they remained 184 percent higher than last year. The regional average daily labor wage rate in August in Bay in nominal terms declined by 21 and 12 percent since six months ago and last year, respectively. In Bakol, the same trend has been noticed as the daily wage rate in August had declined by 32 and 22 percent since March 2012 and last year, respectively. In the Bay and Bakol agropastoral livelihood zones, over half of the income of the poor comes from daily wage labor. The decline in labor rates reflects the poor *Gu* season and off-season, and it has significantly decreased the purchasing power of the poor.

Bakol and Bay remain fairly insecure. Armed conflict in Gedo, Middle and Lower Juba, and the central regions of the country, as well as in northwestern Bakol has reduced humanitarian access and limited trade flows, limiting market supply. The reduced market supplies, have reduced poor households' access to staple foods by increasing prices. Improving access to food and non-food assistance programs and livelihoods investment activities have been planned by implementing agencies. However, due to the escalating insecurity, humanitarian access remains limited, making it difficult to reach all poor agropastoral areas.

The nutrition situation remains **Very Critical** in Bay agropastoral high-potential livelihood zone with a GAM rate of 20.4 percent (CI 16.7-24.5) and a SAM rate of 0.9 percent (CI 5.0-9.4) according to FSNAU and partners' July survey. Mortality is also **Serious**. The CDR was 1.4 deaths per 10,000 people per day (CI 0.93-2.10), with the under-five death rate (<5DR) being 2.7 deaths per 10,000 under-five children per day (CI 1.89-3.89). In Bakol, data from health facilities (HIS) indicated that acute malnutrition may affect over 45 percent of children under the age of five, and the trend was largely stable. Despite the improvement of agricultural labor and livestock sales income since last year, poor households still have significant food consumption gaps and remain in Crisis (IPC Phase 3).

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about Bay and Bakol agropastoral livelihood zones:

- Imported commodity prices are likely to decline in major towns from October to December as trade resumes after the end of the monsoon winds season when smaller ports are again inaccessible. However, in markets further from major roads, during the October to December *Deyr* wet season, some roads may become impassable, reducing fresh supplies into markets and driving prices higher.
- Agricultural inputs will be available both on markets and through some humanitarian channels in these regions.
- Camel milk availability will increase as a medium camel calving rate is expected in neighboring pastoral livelihoods in November.

Most Likely Food Security Outcomes

Despite the expected labor income improvement associated with *Deyr* season agricultural activities, high debt levels from the previous season coupled with high morbidity and limited humanitarian assistance in the agropastoral areas of Bay and Bakol will prolong the poor nutrition outcomes. Poor households still face significant food gaps, and they will remain in Crisis (IPC Phase 3) from October to December.

A near average to above average *Deyr* harvest is expected in January and February 2013 due to the expected average to above-average October to December *Deyr* rains, slightly above average availability of agricultural inputs, and average availability of agricultural labor. In areas that experience flash floods, the land will likely be planted or replanted using recession cultivation which may delay the harvest up to a month in those areas. From January through March 2013, agropastoral households are expected to meet their basic food needs primarily through accessing their own harvested crops from the *Deyr* season starting with green consumption in December and dry consumption with the harvest in January and February. Milk availability will likely increase which will contribute to reducing the malnutrition rate. Post-harvest sales will also help pay off debts. From January to March, poor households' food security is expected to improve to Stressed (IPC Phase 2).

Riverine Livelihood Zones of Middle and Lower Juba, Gedo, Middle and Lower Shabelle, and Hiran Regions

Current Situations

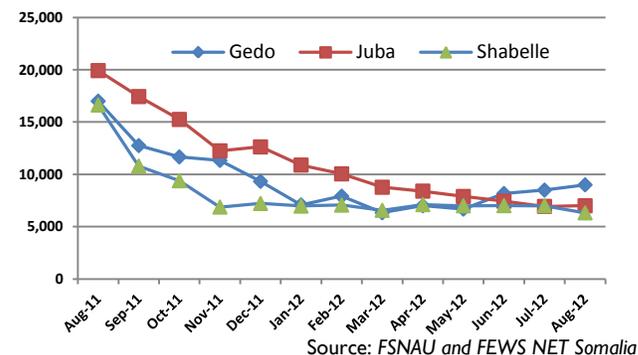
On most of the riverine, rainfed farms a late harvest was expected during the off-season in September. Due to flooding in some areas and late planting due to the late start of the April to June *Gu* rains, much of the harvest was delayed. However, very few *Hagaa* rains fell in July and August. This significantly reduced the expected harvest in September. Cash crops including sesame and cowpeas were affected by severe moisture stress, and, in general, production was not enough to even cover the households' own consumption needs. However, the irrigated farms in Lower Shabelle and in Sakow district of Middle Juba performed more normally, and there was some off-season harvest in September, both of grain and of cash crops.

Between July and August, the price of cow milk decreased in both Lower and Middle Shabelle and Lower and Middle Juba riverine markets, but in Gedo's riverine markets, the price was steady. This price decline is attributable to the influx of cattle from outside the area seeking green pasture and crop residue as well as river water. In August, cow milk prices in riverine markets of Middle and Lower Juba decreased by 16, eight, and 10 percent compared to July, March, and last year, respectively.

The August monthly white maize price in riverine markets of Middle and Lower Juba was the second lowest monthly average since November 2010. This price decline is mainly due to the late *Gu* crop harvested in September, and to conflict blocking cereal outflows from these regions. However, cereal prices in Gedo atypically increased from June to August and

are at their highest since December 2011 (Figure 5). In a typical year, cereal prices decline after the *Gu* harvest in July and August, and then they remain stable during the October and November lean season. Poor riverine households have exhausted their cereal stocks from the April 2012 off-season harvest, and they are currently purchasing food from markets. Agricultural labor, self-employment, and gifts are the current main sources of income, but these alone are not enough to meet the households' food needs. Between July and August, imported commodity prices fell, likely due to the end of the monsoon winds in August, as the winds blocked imports through smaller ports in July and early August. The appreciation of the Somali shilling may also play a role in the decreasing prices. The prices of sugar are one to 12 percent and 30 to 40 percent lower than March and last year, respectively. Imported red rice, wheat flour, and vegetable oil prices have also declined between March and August.

Figure 5: Locally produced regional average cereal (white maize or red sorghum) prices



Labor wage rates have fluctuated over the past few months due to changes in the season such as the delay in the harvest and problems with the off-season harvest in September. However, the terms of trade between one day of agricultural labor and white maize in riverine areas in August remained between 11 and 13 kg of maize per day of labor, which remained among the highest levels since October 2010.

Efforts by the government and AMISOM to control more of the southern regions have led to an intensification of the armed conflict in Gedo, Lower and Middle Juba, and Lower and Middle Shabelle including in riverine areas. The active, ongoing fighting in Lower and Middle Juba has limited the access some households have to their land and has caused some households to invest less of their own labor in their land for fear of being targeted while working on or walking to and from their land. The violence has curtailed trade and population movements. It has also led to reduced humanitarian access, and some households have been unable to reach humanitarian interventions or are afraid to seek out assistance.

In southern Juba riverine livelihood zone, FSNAU and partners in July found the GAM rate to be 34.5 percent (CI 29.9-39.5) and a SAM rate of 11.8 percent (CI 9.4-14.8). In Juba pump irrigated livelihood zone in the northern part of Gedo region, the GAM rate in July was 22.5 percent (CI 19.2-26.1), and the SAM rate was 6.1 percent (CI 1.3-8.9). In riverine areas of Lower and Middle Shabelle Regions, no surveys were conducted due to insecurity. However, HIS data showed that the child malnutrition rate was likely over ten percent, but it had been decreasing since December. These areas were classified **Likely Critical** by FSNAU and partners. In Hiran region, most of the riverine livelihood zone was inaccessible due to insecurity. However, in Beletweyne District, the nutrition survey conducted by FSNAU and partners in July indicated a **Critical** nutrition situation. In Beledweyne District, the GAM rate was 16.6 percent (CI 11.7-22.9). The SAM rate was 3.3 percent (CI 1.7-6.3), and HIS data suggested child malnutrition rates were above 20 percent and had been on an increasing trend since December.

Poor households are likely not able to meet their basic food needs despite improvements in milk availability and from the September off-season harvests. Income from agricultural labor and self-employment alone are insufficient to cover basic food needs. Access to food loans has considerably declined, as the debt levels of poor households have increased beyond the value of their remaining assets due to poor income during the 2012 *Gu* and *Hagaa* seasons. Based on these factors, together with increased insecurity and limited external assistance, poor households have significant food consumption gaps and are classified as being in Crisis (IPC Phase 3).

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about riverine areas:

- Cow milk availability will decrease from October to March in the riverine areas, as a large number of cows will conceive in November and December 2012 during the *Deyr* rains.
- As an impact of likely flooding, outbreaks of water born diseases such as acute watery diarrhea (AWD), cholera, malaria, pneumonia, and measles are likely.
- The river floods and civil insecurity will limit access to basic services including water points and health and sanitation facilities. This will further contribute to high morbidity and acute malnutrition levels.

Most Likely Food Security Outcomes

The projected mild El Niño performance will likely result in normal to above normal October to December *Deyr* rains in both the upper rivers catchment in the Ethiopian highlands and in the South. Due to the weak river embankments and open breakages, localized floods are likely to inundate some of the rainfed farms of the riverine areas in Jowhar, Kurtunwarey, and Sablale Districts in Middle and Lower Shabelle Regions, Beletweyne District in Hiran Region, and Jilib and Jamame districts of Middle and Lower Juba Regions. These floods will likely damage some of the standing crop, inundate some of the farms, and reduce agricultural labor opportunities. In-migrated livestock will return to the highlands to avoid the dampness and insects, thus reducing milk availability in riverine areas. The outbreak of water born diseases and poor sanitation coupled with poor food consumption will likely lead to increasing incidence of acute malnutrition. Continued conflict will also push up food prices.

Riverine areas of the South will likely have access to some labor income, and based on the current cereal prices which indicate some continued cereal availability in markets, the riverine areas from October through December will remain in Crisis (IPC Phase 3).

Between January and March 2013, most riverine communities in Jowhar, Kurtunwarey, and Sablale Districts in Middle and Lower Shabelle Region, Beletweyne and Jalalaqsi Districts in Hiran Region, Lugh and Bardhere Districts in Gedo Region, and Jilib and Jamame Districts of Middle and Lower Juba Regions will harvest a below average crop. However, they will then be able to access some of their own production for both sale and consumption. Of course, some of the crop will be reduced by localized floods. However, many flooded areas will be replanted using recession cultivation as long as households retain access to inputs. While the overall *Deyr* harvest will be delayed, the national-level harvest will likely be near average. Debt levels will most likely not to be reduced during this period due to limited cash incomes and pressing needs to purchase food. Own production and market purchases funded by labor and self-employment between January and March will be limited. They are unlikely to fully cover poor households' food needs, thus many poor households are likely to have food gaps. Households' food insecurity is not expected to significantly decrease and will likely remain in Crisis (IPC Phase 3).

Central and Northern Somalia

The food security and livelihood conditions in the central and northern regions are expected to remain stable or improve slightly between now and March. The positive impacts of average *Gu/Karan* rainfall performance contributed to a mild July to September *Hagaa* season in pastoral areas. This meant normal livestock migrations patterns occurred. In addition to the limited deterioration of conditions in most areas over the course of the July to September *Hagaa* season, localized light to moderate rains in the central regions and some parts of the North in September and October have already improved rangeland conditions and partially recharged water sources. The physical body conditions of most livestock species are near average, and even poor pastoralist have some saleable animals. Kidding and calving is expected during the *Deyr* season. Milk production and accessibility decreased during the July to September *Hagaa* season due to the poor quality of pasture resources, but increased milk is expected over the course of the October to December *Deyr* season. The relatively stable prices of imported food commodities such as rice and the modest decreases of local sorghum prices along with increasing livestock prices have strengthened the purchasing power of pastoralists since January 2012. In September 2012, in the

central and northern markets, one local goat fetched more than a single sack of rice, which weight between 61 and 83 kg. However, many pastoral households are still recovering from reduced herd sizes due to past droughts, so the number of saleable livestock remains somewhat limited.

Exceptions to these general improvements include the pastoralists in parts of Coastal *Deeh*, Guban pastoral livelihood zone in the Northwest, and the central agropastoral (cowpea belt) livelihood zone which continue to face significant food gaps in October. The poor in the Coastal *Deeh* have very limited livestock holdings, high debt levels, exhausted social support systems, and limited access to humanitarian support. There are extreme water shortages in parts of the Coastal *Deeh* livelihood zone of Bari Region. Water expenditures on are increasing the debt levels of the poor households. Poor pastoralists in Guban pastoral livelihood zone are expected to remain in Crises (IPC Phase 3) at least until December when the December to February *Hays* rains are expected. The cowpea belt (central agropastoral livelihood zone) will be in its lean season from October to December, and no improvement is anticipated until December when green cowpea consumption starts.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1: Possible events over the next six months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Riverine areas of Middle and Lower Shabelle and Juba Regions	Moderate El Niño	A moderate El Niño coinciding with the October to December <i>Deyr</i> rainy season could result in additional, excessive flooding along both the Juba and Shabelle Rivers. Flash floods could extend to other areas as well. Intense flooding would destroy standing crops, inundate much arable land, limit agricultural labor opportunities, disrupt trade and population movements, reduce food market supply from trade disruptions, and thus significantly increase food prices. Outbreaks of water born diseases and poor sanitation could result in increased acute malnutrition. With an extreme deterioration in food security, many households would likely reach Emergency (IPC Phase 4).
Southern and central Somalia	A large-scale offensive by the Government of Somalia and AMISOM forces against Al-Shabab	Agricultural activities could be incredibly curtailed in the cereal-producing areas of Bay, Lower and Middle Shabelle and Juba, and Gedo. Expected crop production could be well below average, and food security outcomes could deteriorate to Crisis (IPC Phase 3) or Emergency (IPC Phase 4) levels due to rising prices, poor labor opportunities, and the reduction in national cereal supply.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario. To learn more about this approach to scenario development, visit

http://reliefweb.int/sites/reliefweb.int/files/resources/BE147AE613E2ACCD852577A4005F1D7A-FEWS_Scenario_development_Aug2010.pdf