

SOMALIA Food Security Outlook

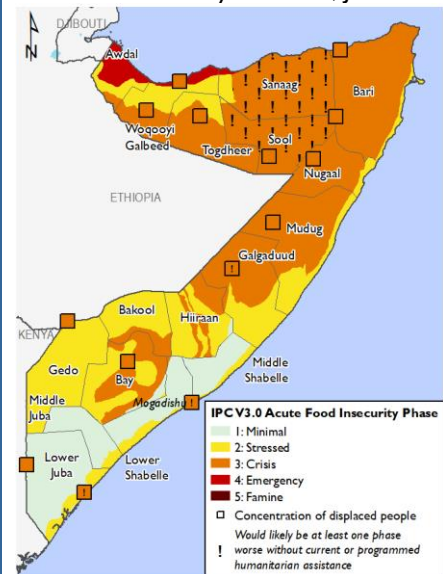
June 2019 to January 2020

Emergency (IPC Phase 4) expected in north-central areas after second consecutive poor rainfall season

KEY MESSAGES

- In April and May, FEWS NET and FSNAU released two alerts and multiple analyses to the donor community detailing the poor start of the April-June 2019 *Gu* rainfall season and expected deterioration in food security conditions across the region. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes were anticipated in June-September 2019. Although heavy rains in mid-May to early-June significantly improved pasture and water availability and restored livestock body conditions, previously projected outcomes remain most likely due to significantly below-average food and income sources resulting in large food consumption gaps and widespread, high acute malnutrition prevalence.
- An estimated 2.2 million people are expected to experience Crisis (IPC Phase 3) or Emergency (IPC Phase 4) outcomes through September and are urgently in need of humanitarian food assistance and interventions to prevent high levels of acute malnutrition. This number could increase as the dry season progresses. The average number of beneficiaries reached with food assistance from January to May 2019 declined 47 percent compared to those reached from August to December 2018.
- In north-central pastoral areas, where most households are still recovering from the extended impact of the 2016/17 severe drought, food security outcomes are driven by stagnated or declining herd sizes. In areas of greatest concern, poor households have maximized debt and credit and are unwilling or unable to engage in extreme depletion of productive livestock assets. As a result, they are expected to have large food deficits reflected by heightened acute malnutrition and excess mortality risk through October, when current livestock conceptions lead to herd size increases. Emergency (IPC Phase 4) is expected in Northern Inland Pastoral, East Golis Pastoral of Sanaag, northeastern and central Hawd Pastoral, and Addun Pastoral livelihood zones in July through September and will be sustained in Guban Pastoral through January.
- In agropastoral areas, national maize and sorghum *Gu* production deficits are anticipated to be approximately 50 percent of normal. Crop failure is likely in Togdheer Agropastoral livelihood zone and localized areas of Bay and Hiiraan. In Hiiraan, severely reduced access to irrigated water prevented timely cultivation, and harvests are not expected until September. As a result of anticipated poor harvests and below-average labor income, Emergency (IPC Phase 4) is expected in Southern Agropastoral livelihood zone of Hiiraan through September, while Crisis (IPC Phase 3) is anticipated in High and Low Potential Agropastoral, Riverine Pump Irrigation of Hiiraan, and Southern Rainfed Agropastoral livelihood zones.
- The October-December 2019 *Deyr* rains, which are forecast to be average, are expected to usher in some food security improvements. In pastoral areas of greatest concern, livestock births are anticipated to increase herd sizes, enabling poor households to engage in some distressed sales of livestock. As households would be able to marginally meet their minimum food needs through livelihoods coping, improvement to Crisis (IPC Phase 3) is expected. The exception is Guban Pastoral livelihood zone, where herd sizes are lowest and Emergency (IPC Phase 4) is likely to persist. In agropastoral areas of concern, access to agricultural labor income and milk is expected to improve during the *Deyr*. However, since green *Deyr* harvests will not become available until late December, Crisis (IPC Phase 3) is expected in Southern Agropastoral of Hiiraan, Bay-Bakool Low Potential Agropastoral, and Southern Rainfed Agropastoral livelihood zones.

Current food security outcomes, June 2019



Source: FEWS NET/FSNAU

FEWS NET and FSNAU classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

NATIONAL OVERVIEW

Current Situation

The delayed and poor start of the 2019 *Gu* (April-June) rains resulted in severe to exceptional drought conditions across Somalia through early May. Following the below-average 2018/19 *Deyr* (October-December) rains and hotter-than-normal 2019 *Jilaal* (January-March) dry season, the onset of the *Gu* was two to three weeks late. In April, satellite-derived rainfall estimates indicated that most of Somalia received less than 50 percent of normal rainfall, while worst-affected areas such as Bari, Galgaduud, and Nugaal received less than 25 percent of normal rainfall (Figure 1). By early May, rainfall deficits had led to widespread pasture and water scarcity, with vegetation measured by the Normalized Difference Vegetation Index (NDVI) falling to less than 60 percent of normal in most of the South and less than 80 percent of normal in the North (Figure 2). Prior to the typical peak of the rainy season, exceptional drought conditions were prevalent in the northeast, the northwest, and parts of the south (Figure 3). In agropastoral and riverine livelihood zones, drought conditions also adversely affected crop cultivation, planting, and germination.

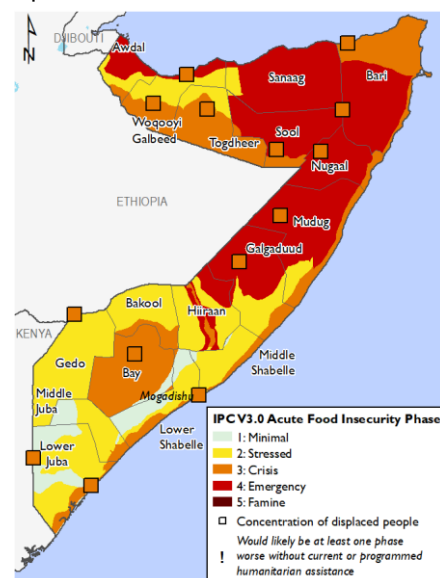
Moderate to heavy rainfall from mid-May to early-June significantly improved the trajectory of *Gu* seasonal performance. By the end of May, cumulative rainfall increased seasonal totals to 60-80 percent of normal in most areas. Now, total cumulative rainfall combined with the 10-day forecast indicate the season is concluding at near-average levels, though parts of Awdal, Bari, Middle and Lower Shabelle, Bay-Bakool, and lower Gedo have sustained notable deficits (Figure 1). The heavy rains broke the drought cycle in most areas, apart from Bari and the Shabelles, according to a comparison of the CHIRPS Standardized Precipitation Index Drought Monitor for the two-month period of March 6 to May 5 against the three-month period of March 16 to May 15 (Figure 3). However, excessive rainfall also caused flash floods, damage to roads and homes, and some livestock mortalities, especially in Nugaal and Bari.

As a result of increased rainfall, pasture and water availability has drastically improved, though localized areas are still experiencing below average conditions (Figure 2). Water prices have declined significantly overall, except in localized areas where water shortages persist, especially in Coastal Deeh Pastoral and Fishing and East and West Golis Pastoral livelihood zones. From April to May, the price of a 20-liter jerry can of water decreased by approximately 40 percent in the Northeast and 50 percent in the Northwest and prices are now near average levels. Prices are similarly near average in central regions, but remain 15-20 percent above average in the South.

Extremely poor livestock body conditions were observed across Somalia during FSNAU and FEWS NET's post-*Jilaal* assessment in April, but field observations in May and June confirmed significant improvements. Livestock body conditions are normal in Awdal, Bay, Hiiraan, Lower and Middle Juba, Lower and Middle Shabelle, and Woqoyi Galbeed regions. In areas recovering from more severe drought, livestock body conditions remain somewhat below average but are trending towards optimal body weight, in Bari, Galgaduud, Mudug, Nugaal, Sanaag, Sool, and Togdheer. Most pastoralists have returned to pursuing normal seasonal migration patterns, moving short distances within their livelihood zones.

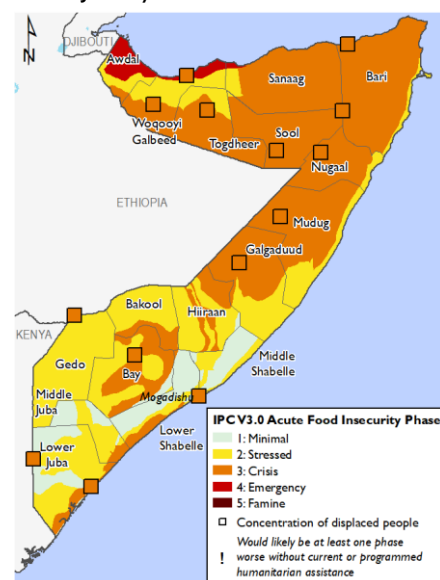
In north-central pastoral areas, prior drought conditions led to some livestock loss, most often due to hunger-induced abortions and culling practices to protect productive female livestock. Consequently, livestock births are medium to low,

Projected food security outcomes, June – September 2019



Source: FEWS NET/FSNAU

Projected food security outcomes, October 2019 – January 2020



Source: FEWS NET/FSNAU

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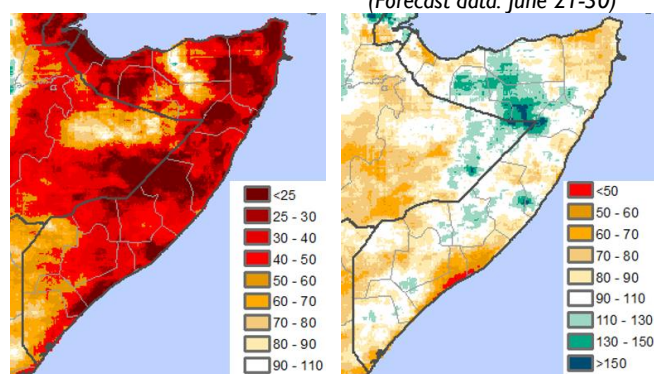
despite medium livestock conception levels in the 2018/19 *Deyr* and access to milk is extremely limited. Due to livestock loss, fewer births, and distressed sales of livestock during the 2019 *Jilaal*, herd sizes have stagnated or slightly declined since December 2018 and largely remain below baseline levels. In the South, livestock births occurred at medium levels, providing some milk for poor households. Though some distressed sales have occurred, this has generally permitted herd sizes to increase to slightly below baseline levels in agropastoral areas and to baseline levels in pastoral areas. Across the country, reported birth levels are inclusive of camel and cattle; in areas where only middle and better-off households own camels, this is providing some milk gifts for the poor. The late start of *Gu* rains delayed livestock conceptions to May/June, but medium to high sheep/goat conceptions and medium camel and cattle conceptions are reportedly ongoing.

In rainfed agropastoral livelihood zones in the South, the poor onset of the *Gu* delayed planting by two-three weeks. Since the rains are subsiding on time in June, this means the growing season is shorter than usual. Erratic rainfall distribution led to reduced area planted, negatively affected seed germination and crop development, and caused localized crop failure. Area planted is largely below average. In Bay, a major sorghum-producing region, estimated area planted with sorghum, cowpeas, and maize is 40 percent below average. In most regions, seed germination failed or crops wilted from moisture stress. Crop damage is most significant in Hiiraan as well as in regions where the contribution to total national production is minimal, including Gedo, Bakool, Lower Juba, and parts of Lower Shabelle. In coastal and adjacent inland areas of the Lower Shabelle and Lower and Middle Juba, farmers suspended *Gu* planting in favor of dry planting for the June-September *Xagaa* showers. Conversely, crop development has performed well in the districts of Afgoye, Wanlaweyn, Qansaxdheere, Diisnaoor, Balad, Jowhar, and Marka.

In riverine areas, area planted for the main harvest is estimated to be 30-40 percent of normal and little-to-no off-season cultivation has occurred in flood recession zones. Many riverine farmers have delayed planting in anticipation of average *Xagaa* showers, which would support cash crops and some maize. Until early May, poor *Gu* rainfall in upper river catchments of the Ethiopian highlands and in river basins in Somalia caused the rivers to nearly dry up and sources of irrigation were completely suspended. Currently, observed river levels now range from below- to above-average but remain well below flood risk at observation stations, except for some localized flood damage in Jowhar district that destroyed roughly 2,000 ha of crops (Figure 4).

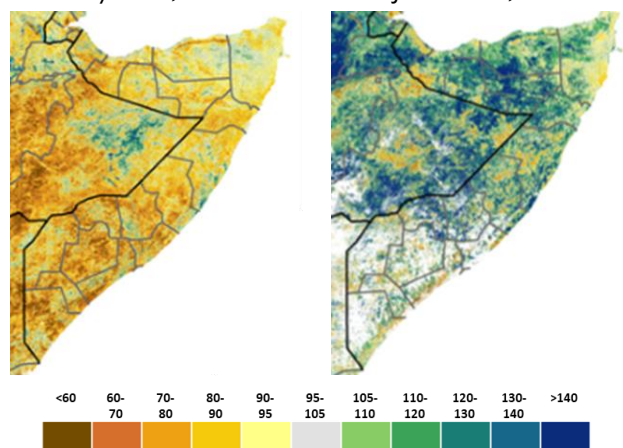
In central Cowpea Belt livelihood zone, area planted was similarly below normal, but relatively better rainfall performance has support normal sorghum and cowpea crop development. In Northwestern Agropastoral livelihood zone, farmers had to forego the first round of short-cycle maize cultivation. Late-planted long-cycle sorghum is in the early stages of growth and harvest prospects will be largely determined by the performance of forecast average *Karan* (June-September) season rainfall.

Figure 1. CHIRPS rainfall as percent of the 1981-2010 average
April 1 - 30, 2019



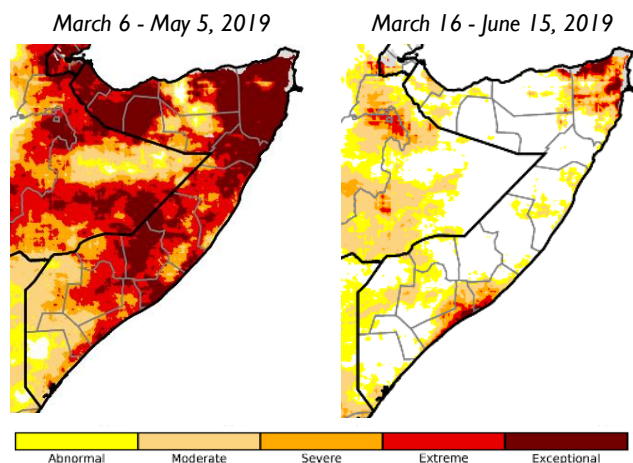
Source: FEWS NET/Climate Hazards Group

Figure 2. eMODIS NDVI as a percent of 2003-2017 median
May 1 - 10, 2019



Source: FEWS NET/USGS

Figure 3. CHIRPS Standard Precipitation Index Drought Monitor



Source: FEWS NET/Climate Hazards Group

An outbreak of desert locust has been reported in late June in coastal areas and this poses additional risk to crop harvest prospects in northwest agropastoral livelihoods. In Togdheer Agropastoral livelihood zone, planting and crop germination was significantly delayed until May. Later, flash floods from the Golis Mountains then destroyed most standing sorghum crops and grass fodder, leading to crop failure.

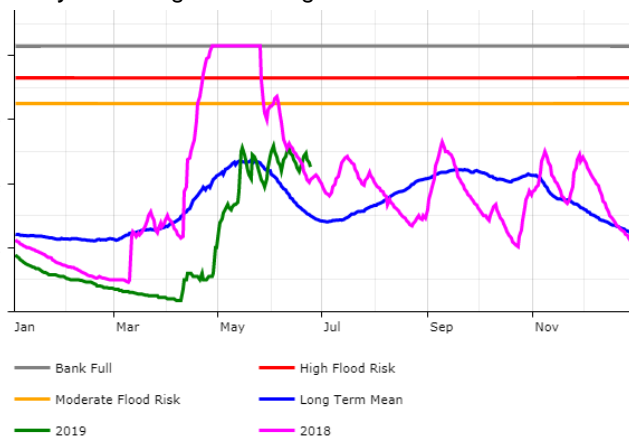
Staple cereal prices have exhibited a stable to increasing trend during the ongoing lean season (April-June) (Figure 5). In May, the retail price of a kilogram of red sorghum in Baidoa reference markets in Bay was SOS 5,200, which is 16 percent higher than May 2018 average but 14 percent below the five-year average. The price of a kilogram of white maize in Qoryoley reference markets in Lower Shabelle was SOS 5,775, which 11 and 23 percent lower than the May 2018 and five-year averages, respectively. In agropastoral areas in the North, the retail price of a kilogram of sorghum is 10 and 20 percent above the May 2018 and five-year averages, respectively, due to low supply because of below-average 2018 *Karan* production.

The prices of imported commodities remained generally stable with respect to last year and the average in most south-central regions. In the Northwest, however, essential imported food items are 5-10 percent above average mainly due to inflation but are same or slightly below last year prices. In May, in the northeast regions imported food items were 10 and 18 percent higher than last year and the recent five-year average price, respectively, due to depreciation of the local currency coupled with recent heavy rains which hampered transport networks in parts of Sool and Nugaal.

Driven by low supply and a seasonal peak in export demand during the Ramadan and Hajj periods, livestock prices range from near to above average. In the Northeast, Northwest, and central regions, the price of a local quality goat was on average 16-30 percent above the five-year average in May. In the South, livestock prices are comparable to the five-year average. As a result of current livestock and food price trends, the goat-to-cereals terms of trade continue to remain generally near to above average. In the Northwest, the current ToT are an average 86kg/local quality goat, which is 25 and 32 percent above the regional 2018 and five-year averages, respectively. In the Northeast, the ToT are also an average 86kg/local quality goat, which is near the regional 2018 and five-year average. In central areas, the ToT are an average 70kg/local quality goat, which is 11 and 25 percent above the regional 2018 and five-year averages, respectively. However, poor pastoralists are limited in their ability to take advantage of these ToT without depleting their livestock assets, as their herds are primarily composed of productive females and livestock less than one year old.

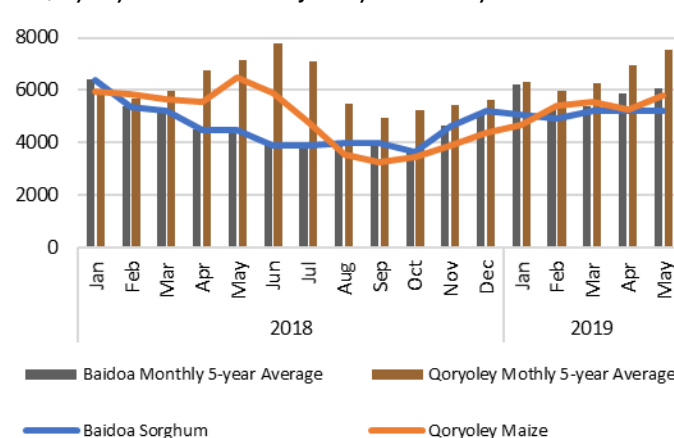
In the South, the labor-to-cereals terms of trade (TOT) increased from April to May, largely due to a seasonal increase in demand for agricultural labor when the current *Gu* agricultural season gained momentum in May. In addition, growing economic activity in most major towns especially in the construction sector has also contributed to increased urban wage rates, except in the southern sorghum belt where increased labor competition has caused wages to slightly decline. In Bay region, for instance, a day of casual labor in May 2019 could buy 18 kg of red sorghum on average and is 5 percent lower than last year but is 13 percent above the five-year average. In Lower Juba, one day of labor wage could fetch 12 kg of white maize compared to 7 kg in 2018 and against the five-year average. Similar trends have been seen in Middle and Lower Juba, Lower Shabelle and Gedo Regions.

Figure 4. Shabelle river level in meters, Beletweyn station, January 2018 – June 2019 against the long-term mean and flood risk levels



Source: FAO SWALIM

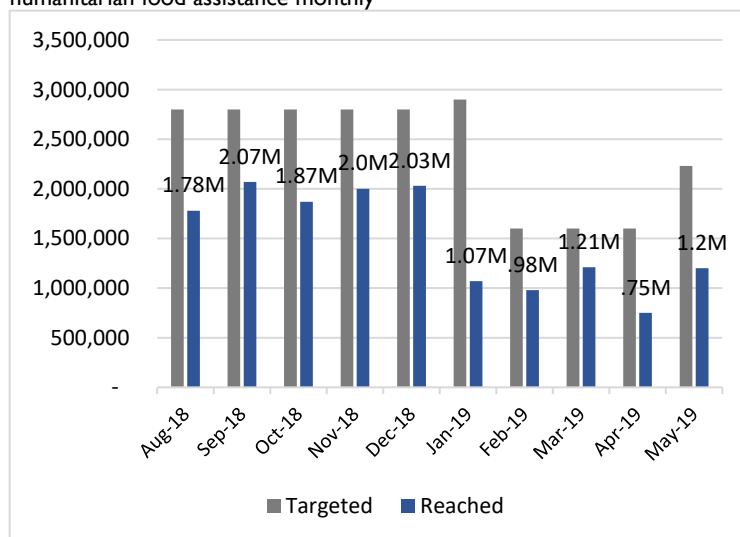
Figure 5. Observed price in SOS of sorghum in Bay and of maize in Qoryoley, Lower Shabelle, January 2018 – May 2019



Source: FSNAU and FEWS NET

According to UNHCR, 2.6 million people are internally displaced within Somalia, due to armed conflict, insecurity, and/or drought. An estimated 162,000 people were displaced from January to May 2019, which represents a 70 percent decline compared to the number of people displaced in the same period of 2018. Out of those displaced in 2019, 56 percent cite conflict and 31 percent cite drought-related causes. Approximately 5,000 people were displaced due to riverine and flash floods in May 2019 (mostly in Middle Shabelle and Hiran regions). Most internally displaced persons (IDPs) have left rural areas in Lower Shabelle, Bakool, Bay, and Sanaag to areas within or outside their region of origin. Top arrival regions include Banadir, Middle Shabelle, and Bakool. An estimated 80 percent of the total IDP population live in urban areas, which is placing pressure on limited labor opportunities and access to social support and services, including health, education and housing.

Figure 6. Targeted versus reported number of beneficiaries reached with humanitarian food assistance monthly



Source: Somalia Food Security Cluster

The number of conflict-related incidents between the Federal Government of Somalia (FGS) and insurgents has increased in 2019, most notably in Mogadishu (Banadir region) and in Bossaso (Bari region). Other areas disrupted by insecurity include Mudug, Galgaduud, Bay, Bakool, Hiiraan, Lower Juba, and Middle and Lower Shabelle, due to resurfaced clan-based conflicts over resources and land ownership in addition to the violent and prolonged armed conflict. In Banadir and Lower and Middle Shabelle, targeted assassinations, roadside bombs and armed clashes between militants and Government forces, backed by the African Union Mission to Somalia (AMISOM), have been commonly reported in 2019. Conflict is driving double taxation of commodities, increased travel distance to avoid roadblocks or illegal tax payments resulting in increased transportation cost, and localized food price increases in rural markets. This adds additional strain to household purchasing power and impedes food access.

Funding shortfalls for humanitarian food assistance (in-kind/cash) led to a 47 percent decline in the average number of people reached with a 30-day ration in 2019 compared to the end of 2018. An average of 1,041,000 people were reached per month from January to May 2019, which is 68 percent of the target population (Figure 6). Nearly 60 percent of the population reached were located in north-central regions and 20 percent were located in Banadir. In June, it is expected that humanitarian assistance continued to reach more than 25 percent of the population in northwest Northern Inland Pastoral and northwest East Golis Pastoral livelihood zones. Conflict continues to inhibit delivery of humanitarian in-kind assistance in south-central rural Somalia.

Extrapolating from nutrition survey results conducted by FSNAU in the December 2018 post-*Deyr* analysis, it is assumed that 'Critical' levels of global acute malnutrition (GAM) are now present in most areas, driven by lower-than-normal food access, increased waterborne illness during the rainy season, and poor access to health services. From January to April, admissions of severely malnourished children to health posts for treatment increased 92 percent, reaching a total of 148,277 cases. 45 percent of admission cases occurred in Mogadishu. In addition, around 1,728 cases of acute watery diarrhea were reported from January to April 2019, attributed in part to limited access to safe water and to prevalent food insecurity, according to the Somali Ministry of Health. The majority (46 percent) were reported in Mogadishu then followed by Bay (23 percent).

In central and northern pastoral areas, Emergency (IPC Phase 4) outcomes persist in Guban Pastoral livelihood zone and Crisis (IPC Phase 3) outcomes exist in Addun Pastoral, northeastern Northern Inland Pastoral (NIP), Hawd Pastoral, and northeastern East Golis Pastoral livelihood zones. In northwestern NIP and northwestern East Golis Pastoral, humanitarian food assistance is mitigating worse outcomes, resulting in Crisis! (IPC Phase 3!). Although rice prices are stable and the goat-to-cereals ToT are favorable, most households have been engaging in distressed livelihoods coping or are facing moderate, widening food gaps. Milk consumption is also below-average to none. Most pastoralists have few to no non-productive animals after losing or selling a large proportion of their herds during the 2016/2017 drought years and this year's *Jilaal* season. Current herd sizes have stagnated or declined since December 2018, and herds are composed of pregnant or lactating females, the next cohort of productive females, and lambs/kids less than one year old. It is expected that most poor

households are willing to sell one more female and her kid to marginally meet their food needs in June, indicative of Crisis (IPC Phase 3). Where households are unwilling or unable to do this, humanitarian assistance and social support is driving Crisis! (IPC Phase 3!). In Guban Pastoral, despite the delivery of humanitarian assistance to approximately 18 percent of the population in May, large food consumption deficits persist due to unsustainable livestock holdings, extremely limited income from livestock and milk sales, and high indebtedness.

In southern pastoral areas, food security has widely deteriorated to Stressed (IPC Phase 2), driving by the impact of drought conditions during the *Jilaal*. Due to deterioration of livestock body conditions during that period, poor herd saleability caused household income to decline. However, improved body conditions, relatively larger herd sizes, and some access to milk is allowing most households to meet their minimum food needs. Poor households are continuing to engage in livestock and livestock product sales, though they have had to increase sales of non-productive livestock to compensate for the cost of atypical migration during the *Jilaal*. The exception is Southern Inland Pastoral livelihood zone of the Juba and Shabelle regions, where poor households have above-baseline livestock assets. Due to medium calving and milk production, households are now able to access adequate income, sustaining Minimal (IPC Phase 1) outcomes.

In Northwestern and Togdheer Agropastoral livelihood zones, households are facing their third below-average production season after two consecutive poor production seasons in 2018. Furthermore, flash floods from Golis Mountains destroyed most of standing sorghum and grass fodder crops. With no household food stocks and below-average agricultural labor income, poor households are relying primarily on markets to access food and are experiencing food consumption gaps. Most areas are in Crisis (IPC Phase 3) but Emergency (IPC Phase 4) outcomes exist in some areas of Togdheer Agropastoral where large flood destruction occurred. In Southern agropastoral areas, areas of greatest concern are Bay-Bakool Low Potential Agropastoral and Southern Agropastoral of Hiiraan, where 2018/2019 *Deyr* crop production and current *Gu* crop cultivation has been very poor and income from agriculture activities are limited. Although sorghum prices remain below average, prices are increasing and household income is significantly below average, limiting households' access to food. As poor households have below-baseline livestock holdings and access to milk is currently low, livelihoods coping strategies are limited and these households are sustaining food gaps indicative of Crisis (IPC Phase 3). In other agropastoral and riverine areas, Stressed (IPC Phase 2) or Minimal (IPC Phase 1) outcomes prevail.

Assumptions

The June 2019 to January 2020 most likely scenario is based on the following national-level assumptions:

- According to the NOAA/CPC forecast, the June to August *Xagaa* rains in coastal and adjacent inland areas of Lower and Middle Shabelle, Lower and Middle Juba, and southern Bay are most likely to be below average. In the northwest, the June to September *Karan* rains is most likely to be average.
- According to the NOAA/CPC forecast, October to December *Deyr* rainfall is most likely to be average. However, uncertainty exists associated with the long-term likelihood of El Niño and positive Indian Ocean Dipole.
- Based on rainfall performance to date, below-average area planted, anticipated crop loss, and diversion of some crops for fodder sales, national *Gu* maize and sorghum production is likely to be 50 percent below average. Of this, the only areas where local production is likely to be near average is Sorghum High Potential livelihood zone of Lower and Middle Shabelle. In Southern Agropastoral of Hiiraan and Togdheer Agropastoral, *Gu* crop failure is expected. However, Togdheer is expected to realize average to high grass fodder production due to the recent flash floods.
- Based on rainfall performance to date, below-average area planted, and forecast average *Karan* rainfall, *Gu/Karan* production in Northwestern Agropastoral is likely to be below average.
- Based on anticipated average *Deyr* rainfall and in order to recoup losses in the *Gu*, area planted in southern agricultural areas are likely to be above average. Farmers will rely on kinship and loans to access seeds for planting.
- Agricultural labor demand in southern agropastoral areas is expected to be below-average through the end of the *Xagaa* season in August/September. In the *Deyr*, labor demand is expected to be average despite above-average area planted.
- Based on current vegetation conditions and forecast average *Karan* rainfall, rangelands resources throughout most of Somalia are likely to last through August or September. However, local areas still affected by drought in the northeast and along the coast, given below-average *Xagaa* rainfall, are likely to remain below average. Anticipated *Deyr* rainfall is likely to seasonally replenish pasture and water resources in November to January.

- Given improved vegetation, livestock body conditions are expected to be optimal through July, then seasonally decline through October. Average *Deyr* rainfall is expected to lead to seasonal improvement again in November to January.
- Based on conceptions during the *Gu*, medium cattle calving is likely in January in the South. Medium to low camel births are expected in July and November. Sheep/goat births are expected to be medium to high across the country in October. As a result, poor households are expected to access some camel milk gifts through January. Though current milk production is below average, milk is expected to return to typical levels by October.
- Given low livestock supply, livestock prices are expected to be near to above average through January. A contributing factor is increased national and export demand due to seasonal Ramadan and Hajj activities through at least September.
- As a result of two consecutive below-average production seasons, the low domestic staple cereal supply is expected to lead to an increase in sorghum and maize prices through November. Local cereals prices will likely be slightly below their 5-year average but above last year levels.
- Imported volumes of staple foods and diesel are expected to decline through September, due to limited maritime trade during the Indian Ocean monsoon season. Anticipated insecurity in the Middle East is also likely to cause volatility in oil prices, contributing to an increase in transport costs. As a result, the price of imported food commodities in the North, including rice, wheat flour, vegetable oil, and sugar, are expected to be above average.

- The Somali shilling (SOS) is generally likely to be stable against major foreign currencies but will somewhat be influenced by reduced imports during the monsoon high sea closure season between April and September, high demand for shilling related to the expected livestock exports, and the limited supply of the paper Somali shilling notes in circulation. The Somaliland Shilling (SLS) is also likely to be stable with slight fluctuations around the rates of SLS 9,000 to 10,000 against one United States dollar in the outlook period.
- Household purchasing power measured by the goats-to-cereal terms of trade (ToT) is expected to be average to slightly above average, driven favorable livestock prices, the stable SOS and SLS, and anticipated cereal prices. Labor-to-cereal ToT is expected to follow seasonal trends at near- to slightly above-average levels. The labor-to-cereal ToT will likely peak in July-September after the arrival of cereals from *Gu* production.
- Based on current trends, conflict between the governments of Somalia supported by AMISOM and other International partners and clan conflict over land and resource management is expected to continue to contribute to loss of life, displacement, disruption to livelihoods, and restrictions on access to trade and humanitarian assistance. Disagreement between the Somali federal and regional states could further result in a lapse in the provision of security services. Conflict is most likely to affect the Shabelles, Jubas, Bay, Bakool, Hiiraan, Gedo and Galgaduud regions.
- According to the Somalia Food Security Cluster, planned humanitarian food assistance would reach 1.9 million people or 15 percent of the population from July to September, but funding has not been fully secured. Assistance would consist of in-kind/cash equivalent 30-day rations. Since funding cannot be confirmed, an absence of food assistance is assumed.

Most Likely Food Security Outcomes

Pastoral areas

In the absence of large-scale humanitarian assistance, food security is expected to rapidly worsen to Emergency (IPC Phase 4) through September in Northern Inland Pastoral, East Golis Pastoral of Sanaag, northeastern and central Hawd Pastoral,

Figure 7. Observed and projected goat prices in SOS/goat in Garowe, Nugaal region, December 2018 – January 2020

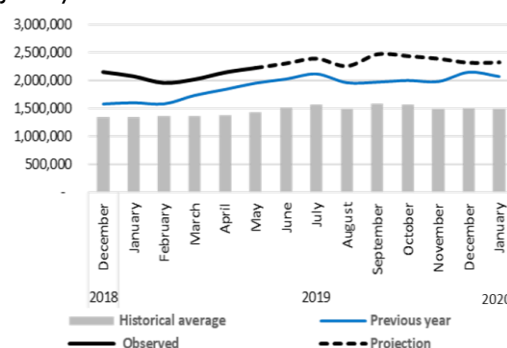
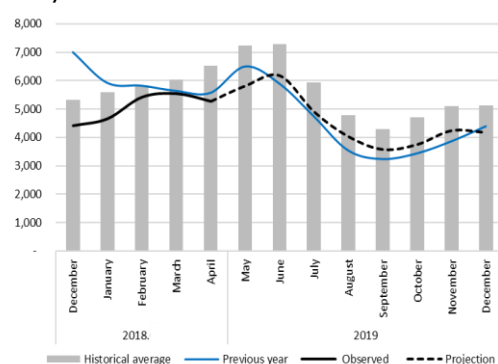


Figure 8. Observed and projected red sorghum prices in SOS/kg in Baidoa, Bay region, December 2018 – January 2020



Source: FEWS NET/FSNAU

and Addun Pastoral, while Guban Pastoral is expected to sustain Emergency (IPC Phase 4). Although most poor households are expected to sell one female goat and her kid in June to finance food purchases, it is expected that they are unwilling or unable to sell enough productive female livestock to marginally meet their minimum food needs from July to September. Although some camel milk gifts are expected from middle and better-off households, this is likely to seasonally decline during the dry season. Further, little to no own goat milk is expected to be available for consumption due to low births. It is also expected that poor households, who were already heavily indebted due to the prolonged impact of the 2016/17 drought on livestock assets, have maximized their debt and credit options due to the impact of the 2019 drought. In order to access additional debt or credit, households would have to sell more livestock to pay off existing debt. Given very limited income from livestock sales and few other food and income sources, households are expected to experience large food gaps despite favorable terms of trade. The prevalence of acute malnutrition is expected to be sustained at 'Serious' (GAM WHZ 10-14.9) or 'Critical' (GAM WHZ 15-29.9) levels in most areas through September, due to increased waterborne disease incidence in the *Gu*, limited milk availability, and food deficits. Risk of excess mortality associated with Emergency (IPC Phase 4) is likely.

In East Golis Pastoral of Bari, Coastal Deeh Pastoral and Fishing, and Hawd Pastoral of Northwest, poor households are expected to be able to sell some livestock and milk, but not enough to prevent moderate food gaps. In Coastal Deeh, fishing opportunities will also be seasonally low during the Indian Ocean Monsoon season. Given low food and income sources and high debt levels, most poor households will likely be unable to purchase or borrow enough quantities of food and are expected to face Crisis (IPC Phase 3) outcomes. The poorest households may fall into Emergency (IPC Phase 4). In Juba Pastoral, West Golis Pastoral, and Southern Inland Pastoral of Bakool, Gedo, and Hiiraan livelihood zones, livestock herd sizes are relatively sustainable but still below baseline levels, permitting poor households to meet their basic food needs. However, given higher cereal prices, households are expected to remain Stressed (IPC Phase 2). In Southern Inland Pastoral of Juba and Lower Shabelle regions, where livestock assets are normal, Minimal (IPC Phase 1) is likely.

From October to January, medium to high livestock births are expected to lead to sufficient herd growth and access to milk in areas of greatest concern to permit poor households to marginally meet their minimum food needs. Increased livestock sales and milk consumption are expected to minimize food gaps, as poor households will be able to repay and take on more debt/credit or will be able to purchase food. This is expected to drive improvement from Emergency (IPC Phase 4) to Crisis (IPC Phase 3), with the exception of Guban Pastoral livelihood zone. In Hawd Pastoral of Northwest and East Golis of Bari, Crisis (IPC Phase 3) outcomes are expected to persist since pastoralists are expected to divert income from livestock sales to repay large debts accrued in late 2017/18 and early 2019. However, Coastal Deeh Pastoral and Fishing is expected to improve to Stressed (IPC Phase 2) given resumed access to and income from fishing.

Agropastoral Areas

From June to September, food security is expected to deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) in Southern Agropastoral of Hiiraan and from Stressed (IPC Phase 2) to Crisis (IPC Phase 3) in High Potential Sorghum Agropastoral, Riverine Pump Irrigation of Hiiraan, and Southern Rainfed Agropastoral livelihood zones. Crisis (IPC Phase 3) is expected to be sustained in Bay-Bakool Low Potential, Northwestern, and Togdheer Agropastoral livelihood zones. Food insecurity is expected to be driven by significantly below-average *Gu* production, resulting in below-average household and market food stocks and below-average household income. Household food stocks are expected to be sufficient for only one to two months in most areas. However, localized crop failure is expected to drive more severe outcomes in some areas. Needs will be greatest in Southern Agropastoral of Hiiraan, as this will be the third successive season of crop failure. In Togdheer Agropastoral, the failed *Gu* harvest is likely to be partially mitigated by average to good grass fodder production. In Riverine Pump Irrigation of Hiiraan, due to extremely limited access to irrigated water, poor households will only harvest off-season *Gu* crops in September. Throughout these areas, many households are expected to engage in distressed livestock sales, eroding their coping capacity since most herds remain below baseline levels. In contrast, as households along the Juba river rely more heavily on cash crop production that is more drought tolerant, poor households are expected to be able meet their food needs and be Stressed (IPC Phase 2). The prevalence of acute malnutrition is expected to be sustained at 'Serious' (GAM WHZ 10-14.9) or 'Critical' (GAM WHZ 15-29.9) levels through September, as a result of increased waterborne disease incidence from the *Gu*, suspected cases of measles, confirmed malaria cases, and reduced food availability and access.

From October to January, access to agricultural labor income and milk is expected to improve during the *Deyr*. However, household cereal stocks will be limited and quickly depleted. Although staple food prices are expected to remain below the five-year average, prices are likely to rise to above the 2018 average, straining household purchasing power. Due to below-baseline herd sizes, improved milk is unlikely to reach average levels and livestock sales would still constitute distressed sales. Given that net food and income sources are expected to remain below average, and that green *Deyr* harvests will not become available until late December, Crisis (IPC Phase 3) is expected to be sustained in Togdheer Agropastoral, Bay-Bakool Low

Potential Agropastoral, and Southern Rainfed Agropastoral livelihood zones. Southern Agropastoral of Hiiraan is expected to improve from Emergency (IPC Phase 4) to Crisis (IPC Phase 3). In Northwestern Agropastoral livelihood zones, the *Gu/Karan* harvest is expected in November, improving food availability and access for many households. However, as the harvest is expected to be below average, Crisis (IPC Phase 3) is expected to be sustained.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Delayed onset of October-December 2019 Deyr rainfall in the October-January projection period	Should the onset of the forecast average Deyr rains be delayed by 20-30 days, agropastoral households in South/Central would experience a third consecutive season of below-average production due to the shortened crop growing period. This would also extend the lean season to January, increase cereal prices to above average, and reduce agriculture labor income. Herd sizes would likely be further depleted through distressed sales and low productivity and reproduction. Emergency (IPC Phase 4) would be sustained in agropastoral of Hiiraan and Crisis (IPC Phase 3) would be widespread.
Agropastoral areas in south-central Somalia	Above-average October-December Deyr rainfall in the October-January projection period	<p>In northern and central Somalia, pasture and water would exceptionally improve, and this would lead to high livestock conception rates. Expected medium to high livestock births would further increase herd sizes, although they would remain below baseline levels. Pastoral households in Addun, NIP, Hawd Pastoral, Coastal Deeh Pastoral, and East Golis Pastoral would still face food consumption gaps due to limited livestock to sell, but milk consumption would be significantly higher than currently expected. Crisis (IPC Phase 3) would still be most likely, but food gaps would be minimized.</p> <p>In agropastoral areas and in the South, the rains would support above-average Deyr harvests and labor, improving food access. More households would improve to Minimal (IPC Phase 1) or Stressed (IPC Phase 2). However, above-average rainfall in riverine areas would cause flooding, resulting in reduced food and income sources. Poor households and even some middle-income households could enter Emergency (IPC Phase 4) with few options for coping, no access to labor markets, and an extreme curtailment of trade.</p>
National	Scaled up assistance at levels similar to 2017/18	Sustained, large-scale humanitarian assistance would improve food security outcomes and could lead to further improvements in many areas. Stressed! (IPC Phase 2!) and Crisis! (IPC Phase 3!) outcomes would be likely.

AREAS OF CONCERN

Northern Inland Pastoral livelihood zone

Current Situation

Below-average 2018/19 Deyr rainfall, above-average land surface temperatures during the 2019 *Jilaal* season, and the poor start of the 2019 *Gu* rainfall resulted in extreme to exceptional drought conditions that persisted through early May in most of Northern Inland Pastoral livelihood zone and through early June in many parts of Bari region. By May 10th, just prior to the typical peak of the *Gu* rainy season, the area had only accumulated 10-25 mm of rain since January 1st, which was 50-70 percent below the 2000-2018 mean of 35-60 mm according to CHIRPS. This caused severe depletion of pasture and water resources, resulting in extremely poor livestock body conditions and atypical livestock migration to neighboring Hawd Pastoral livelihood zone. Water prices rapidly increased, reaching twice the five-year average in March.

During this timeframe, poor households maximized their debt and credit options to meet the cost of water trucking, livestock hand-feeding, sustained migration, and food. Poor households currently report an average household debt of US\$489, which is equivalent to 9 goats. Due to a combination of distressed sales of productive livestock, low-to-medium livestock births, some livestock losses, and the impact of extremely poor body conditions on saleability, poor households' herd sizes have stagnated since February. Based on the 2019 preliminary post-*Gu* assessment conducted by FSNAU and FEWS NET in May, it is estimated that the average poor household currently holds 0 camels and 35 sheep/goats. This is equivalent to the average herd size estimated during the 2018/19 post-Deyr assessment and remains 40 percent below the baseline herd size of 0 camels and 57 sheep/goats. It is further expected that poor households located in Northwestern NIP of Sanaag and Sool have relatively fewer livestock compared to poor households in Northeastern NIP of Bari and Nugaal.

The performance of the *Gu* reached a turning point between mid-May and early June, when moderate to heavy rainfall increased cumulative totals to 70-125 percent of average, though the rains have now subsided. This rainfall coupled with flash floods in highland areas fully replenished most water sources and has rejuvenated pasture and browse to above-average levels, though some dryness persists in eastern Bari. In response, all out-migrated livestock returned to normal wet season grazing areas near the homesteads, and pastoralists are now accessing free water from natural ponds and communal dams. The average price of a 20-liter jerry can of water declined by 42 percent from April to May to 3,350 SOS in rural markets, which is 3 percent below the five-year average but 37 percent above the May 2018 average.

The renewed availability and accessibility of varied pasture and browse varieties is driving improvements in livestock production, reversing the deterioration observed in the *Jilaal* (Figure 10). All livestock species are now reportedly improving to prime body condition, weight, and fecundity. Although only low to medium goat/sheep kidding/lambing has occurred in the *Gu*, high levels of goat/sheep conception are ongoing. Pastoralists intentionally permitted unrestricted goat/sheep mating due to current pasture and water availability, which is unusual as mating is typically strategically controlled in relation to limited natural resource availability. Among better-off households with camel holdings, low to medium camel calving in the *Gu* is being followed by medium levels of camel conception. As a result, goat and camel milk yields are increasing and poor households are accessing some camel milk gifts from relatives. However, total goat and camel milk consumption remains below average given below-normal herd sizes and current birth levels.

In May, goat prices in rural reference markets in Bari, Nugaal, Sanaag, and Sool were 6 and 25 percent above last year and five-year average. This is due to improved body conditions and reduced livestock market supply, as well as increased demand for Ramadhan restocking in light of adequate pasture and water availability. Imported food commodity prices are somewhat above average in most markets. The price of imported rice in May declined from April but was 19,750 SOS/kg, which is 10 and 17 percent higher than the May 2018 and the five-year averages. As a result of these price trends, the goat-to-rice ToT is currently 85kg/head, which is comparable to May 2018 and 21 percent above the five-year average and provides approximately one month of food for an average household of seven.

According to the Food Security Cluster, humanitarian food assistance reached an average 299,186 beneficiaries per month with a 30-day ration or cash/voucher equivalent from March to May, representing 13 percent of the population in Bari, Sanaag, Sool, and Nugaal. Within the regions of this livelihood zone, the proportion of the population reached was highest in Sanaag and Sool, and it is expected assistance reached at least 25 percent of the population in these areas.

Despite improving livestock production trends in June and favorable goat-to-rice ToT, most poor households are only able to mitigate large food consumption gaps by engaging in distressed sales of productive female livestock. Households were already in a period of recovery after the 2016/2017 drought, and the consecutive impact of the below-average 2018/19 *Deyr*, harsh 2019 *Jilaal*, and poor start of the 2019 *Gu* severely strained their coping capacity. Currently, an estimated 50 percent of the average herd size consists of juveniles less than one-year old or pregnant females, while the remaining 50 percent consists of productive females that would conceive in the 2019/20 *Deyr* cohort. It is expected that poor households in northwestern NIP have less livestock on average than those in northeastern NIP. Given maximized debt levels, below-average milk consumption and sales, and overstretched social support, poor households are only able to purchase food by selling a productive goat to finance the purchase or to pay off some debt in order to buy food on credit. The last nutrition survey conducted by FSNAU in

Figure 9. Area of concern reference map, Northern Inland Pastoral livelihood zone



Source: FEWS NET and FSNAU

Figure 10. Poor goat body conditions in Dahar/Badhan, Sanaag region, March 2019



Source: FEWS NET

December 2018, acute malnutrition prevalence was 16.5 (12.5-21.4) percent in Northwest NIP, which is indicative of Critical (GAM WHZ 15-29.9 percent), and 11.0 (8.6-14.0) percent in Northeast NIP, which is indicative of Serious (GAM WHZ 10-14.9 percent). While a more recent nutrition survey has not yet been conducted, it is assumed acute malnutrition levels have deteriorated further due to low access to milk and below-normal food consumption. Due to existing food gaps, depleted livestock holdings, and above-normal acute malnutrition prevalence, mitigated by humanitarian food assistance, Crisis! (IPC Phase 3!) outcomes are expected in Northwestern NIP of Sool and Sanaag and Crisis (IPC Phase 3) is expected in Northeastern NIP of Bari and Nugaal.

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about Northern Inland Pastoral livelihood zone:

- Due to the regeneration of pasture and water resources to above-average levels in most of the livelihood zone, and given low grazing pressure due to below-baseline herd sizes and good herd distribution throughout the zone, pasture and water resources are expected to last through September. The forecast average *Deyr* is expected to replenish these resources again from October to January.
- Poor households' herd sizes are expected to increase by an average of five goats in October-January (Table 1). Medium to high rates of goat kidding are expected in October-November, representing an average 8-10 births. However, households are also likely to sell up to five female goats. Given forecast average *Deyr* 2019/20 rains, medium livestock conception is expected from October to January.
- Household access to goat milk from own livestock is expected to be below-average through September due to below-baseline herd sizes. Milk consumption is likely to improve to normal in the October-January period due to the high proportion of anticipated goat births. Access to camel milk is expected to be low, due to low to medium camel calving in the *Gu* and anticipated low camel calving in the 2019/20 *Deyr* as a result of low 2018/19 *Deyr* conceptions.
- Based on FEWS NET's integrated price projections in Garowe reference market, goat prices are expected to remain 50 to 56 percent above the five-average due to improved livestock body condition and value, the impact of low livestock holdings on market supply, and high demand driven by Ramadan and Hajj restocking efforts.
- Camel and goat milk availability is likely to increase to average during the outlook period as current good pasture and water and expected average *Deyr* rains will lead to sufficient pasture to maintain average to good livestock body conditions.
- Casual labor demand driven by seaborne trade, which provides some migratory labor opportunities, is expected to seasonally decline through September due to the Indian Ocean monsoon season.
- The current ban on charcoal collection is expected to remain in place throughout the scenario period.

Table 1. Observed and projected average goat/sheep herd size reported by poor households

<i>Post- Deyr</i> 2017/18	<i>Post- Jilaal</i> 2018	<i>Post- Gu</i> 2018	<i>Post- Deyr</i> 2018/19	<i>Post- Jilaal</i> 2019	<i>Post-Gu 2019</i>	<i>Post-Deyr 2019/20</i>
20	18	28	35	33	35 ≈ 8 less than 1-year old ≈ 10 pregnant females ≈ 17 adult females	40 ≈ 18 less than 1-year old ≈ 10-12 adult females likely to conceive ≈ 10-12 adult females

Most Likely Food Security Outcomes

From June to September, food security is expected to rapidly deteriorate to Emergency (ICP Phase 4), despite adequate availability of rangeland resources. Poor households are expected to prioritize protecting their already depleted herd assets, and household income and food sources will be additionally constrained by their inability to take on new debt without first paying down existing debt. Limited to no own milk for consumption is expected as most female goats are conceived or will conceive in the next cohort, although some camel milk gifts from better-off households are expected. Although imported

food commodity prices are expected to remain stable and livestock prices are likely to increase due to demand for Hajj restocking, driving increased livestock-to-cereal ToT, poor households are not expected have very limited benefit from this due to few to no livestock sales. In the absence of humanitarian assistance, and under the assumption that households are unable or unwilling to engage further deplete their livestock assets, it is expected that poor households will face large food consumption gaps, high acute malnutrition, and a risk of excess mortality.

Due to the forecast average October to December *Deyr* rainfall, it is expected that seasonal improvements in pasture and water resources and livestock body conditions will be average to good. A medium to high number of sheep and goat offspring are expected in October, increasing livestock herd sizes and household access to milk. Poor households will likely sell some animals to repay previous debts, benefitting from a seasonal increase in livestock prices due to average to good body conditions and stable local demand for restocking. Driven by these crisis coping strategies, food consumption gaps are expected to be reduced to moderate levels, and most poor households would improve to Crisis (IPC Phase 3). However, some poor households whose livestock herds are smaller than average and are relying solely on borrowing and gifts to access food will likely remain in Emergency (IPC Phase 4).

Addun Pastoral livelihood zone

Current Situation

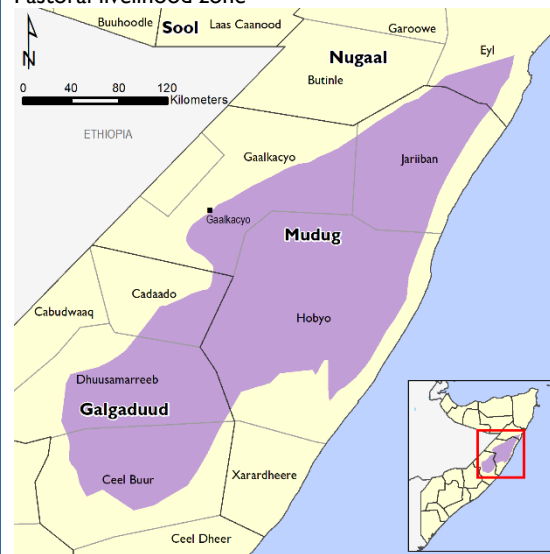
Similar to Northern Inland Pastoral livelihood zone, Addun Pastoral livelihood zone sustained less severe but extremely dry drought conditions through early May. Cumulative rainfall through May 10th was only 40-50 percent of average, resulting in extremely limited pasture and water access and prompting atypical migration. In March and April, water prices were higher than average due to the increased cost of water trucking. This led to excess sheep and goat mortalities in late April and early May, in part due to culling of newborn animals to save mothers since most births occurred late March to late April.

Heavy rainfall from mid- to late-May increased cumulative rainfall to slightly above average levels, though rainfall subsided by early June. Western areas of Addun received relatively more rainfall than eastern areas adjacent to the coast, which has attracted livestock migration to the west from the east. The alleviation of acute drought brought a rapid increase in water, pasture, and browse availability, which is now generally above average. As a result, water trucking activities in rural areas have stopped and water is accessible at communal seasonal ponds and shallow wells in main villages. However, water prices in Jariiban rural market remain SOS 4100 per 20-liter jerrycan from April but is 82 and 41 percent higher than May 2018 and 5-year average due to poor to below average Gu 2019 rainfall received.

Heavy rainfall and enhanced rangeland conditions are driving some improvements in livestock production, but herd sizes have stagnated or declined since February. Livestock body conditions rebounded to near-normal levels in June, and a medium level of conceptions are ongoing across all species in most of the livelihood zone. However, sheep and goat births during the *Gu* were low due to low conceptions in the preceding below-average 2018/19 *Deyr* and due to hunger-driven abortions. As these births occurred earlier in the season, goats that gave birth have already stopped lactating. Camel calving among poor households was low to none, due to very low conceptions in the 2018 *Gu* season; however, medium calving occurred among middle and better-off households. As a result, poor households' access to goat and camel milk is significantly below average, though some camel milk is available for sale or gifts. Although data on herd sizes was not collected during the preliminary 2019 post-*Gu* assessment, it is estimated that the average herd size among poor households is in the range of 34-38 sheep and goats and 2 camels, compared to 38 sheep and goats and 2 camels reported in the post-*Deyr* and baseline levels of 57 goats and 4 camels. This is attributed to lower than normal reproductivity, abortions, and mortalities as well as some distressed sales of productive livestock.

Given stagnating growth of the livestock population after the losses incurred during the 2016/2017 drought, local livestock

Figure 11. Area of concern reference map, Addun Pastoral livelihood zone



Source: FEWS NET and FSNAU

market supply remains significantly below typical levels even though demand remains high, particularly given restocking efforts following Ramadan. In May, the average price of a local quality goat in key reference markets of Dhusamareb and Galkayo was SOS 1,450,000, which is 12 and 31 percent above the May 2018 and five-year averages, respectively. At the same time, staple food prices were marginally to moderately above average, attributed to devaluation of the Shilling. The price of rice, one of the staple foods in this area, was SOS 21,000 per kg in May, representing a five and 12 percent increase compared to the May 2018 and five-year averages. Despite the increase in food prices, the goat-to-rice and goat-to-sorghum terms of trade remain favorable at 69 kg of rice and 94 kg of red sorghum per goat, which is 8 and 27 percent above the five-year average, respectively. This would provide approximately one month to 40 days' worth of food needs for an average family of seven.

According to the Food Security Cluster, humanitarian assistance has considerably declined since the final quarter of 2019. From March to May, food assistance reached an average 5-6 percent of the population per month with a 30-day ration in Galgaduud and Mudug, compared to 18-23 percent in October-December 2018.

Given the impact of recurrent drought on livestock production and the decline in humanitarian assistance, poor households' food and income sources remain significantly below average. Although data on current debt levels has not been collected since December, poor households have heavily relied on debt and credit to meet the cost of water trucking, livestock hand-feeding, and migration, in addition to food expenditures. It is assumed average household debt exceeds US\$375, which is equivalent to 7 goats. Stagnating or declining livestock asset holdings, coupled with very poor livestock body conditions until late-May/early-June, has limited livestock saleability and negatively affected household food access, despite persistent favorable terms of trade. Access to milk is also drastically reduced compared to a normal year. At the same time, increased competition to exploit natural resource and oversupply of labor has reduced income from causal labor and bush product sales, which normally contribute less than 10 percent of their income. According to FSNAU's nutrition survey in December 2018 and subsequent projections, it is assumed that acute malnutrition prevalence had deteriorated from Alert levels (GAM WHZ 5-9.9 percent) to Serious levels (GAM WHZ 10-14.9 percent) due to reduced milk and food consumption. As households are only marginally able to meet their food needs through distressed sales of livestock and are experiencing above-normal acute malnutrition, Crisis (IPC Phase 3) outcomes are present in this livelihood zone.

Assumptions

In addition to the national assumptions described above, the following assumptions are made about Addun Pastoral livelihood zone:

- Due to the regeneration of pasture and water resources to above-average levels in most of the livelihood zone, and given low grazing pressure due to below-baseline herd sizes, pasture and water resources are expected to last through September. However, the eastern part of the livelihood zone will be relatively drier than the west, with more livestock movement expected. The forecast average *Deyr* is expected to replenish these resources again from October to January.
- Poor households' herd sizes are expected to increase by an average of five goats through January. Medium rates of goat/sheep kidding/lambing are expected in October-November, representing an average 8-10 births. However, households are also likely to sell up to five female goats. Given forecast average *Deyr* 2019/20 rains, medium livestock conception is expected from October to January.
- Household access to goat milk from own livestock is expected to be below-average through September due to below-baseline herd sizes. Milk consumption is likely to improve to normal in the October-January period due to the high proportion of anticipated goat births. Access to camel milk is expected to be low, due to low to medium camel calving in the *Gu* and anticipated low camel calving in the 2019/20 *Deyr* as a result of low 2018/19 *Deyr* conceptions.
- Based on FEWS NET's integrated price projections in Galkayo reference market, goat prices are expected to remain 35 to 2 percent above the five-average due to improved livestock body condition and value, the impact of low livestock

Figure 12. Near-average goat body conditions Bali-Busle/ Jarriban, Mudug region, May 2019



Source: FEWS NET

holdings on market supply, and high demand driven by Ramadan and Hajj restocking efforts.

- Based on FEWS NET's integrated price projections in Galkayo reference market, the price of imported rice and wheat flour are likely to follow seasonal trends but remain slightly elevated. The price of imported rice is likely to range from SOS 22,000 to SOS 25,000 through December, 23 to 25 percent above the five-year average.
- Camel and goat milk availability is likely to increase to average by October-December as current good pasture and water and expected average *Deyr* rains will lead to sufficient pasture to maintain average to good livestock body conditions.

Most Likely Food Security Outcomes

Despite improved improvements to rangeland resources and livestock body conditions, poor households' food and income sources are expected to remain extremely limited through October. Similar to NIP, this will be driven by few to no sales of livestock, given that the entirety of the herd is composed of pregnant females, females that will conceive in the *Deyr*, and lambs/kids less than one year old. Given low births in the *Gu*, access to milk for consumption will also be minimal through September. As a result, the food security situation will rapidly deteriorate from July to September to Emergency (IPC 4), and poor households will be subject to large food gaps, high acute malnutrition prevalence, and an increased risk of excess mortality.

From October to December, average *Deyr* season rainfall is likely and expected to lead to modest food security improvements. Enhanced rangeland conditions, medium sheep and goat births, and improved access to milk is expected to enable poor households to sell up to five mature goats to repay loans and purchase food. Food consumption gaps are thus expected to decline to moderate levels, and acute malnutrition is expected to decline but remain above normal. Crisis (IPC 3) outcomes are expected.

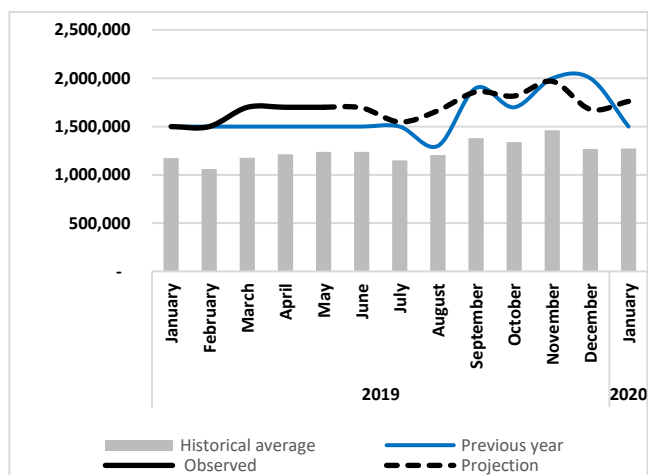
Bay-Bakool Low Potential Agropastoral livelihood zone

Current Situation

The onset of *Gu* rainfall was delayed until late April in Bay and Bakool, leading to two-week delays in planting. Despite heavy rainfall in April, rainfall in the remainder of the season has been poorly distributed, especially in Bakool. Although cumulative totals had approached near-average levels by mid-May according to CHIRPS, the rains subsided to typical, minimal amounts in June (<10 mm). Given its erratic and brief performance, rainfall has not been sufficient to support crop establishment and growth in most areas. Although late May rainfall enabled some sorghum crop germination, many planted crops were unable to grow due to moisture stress. In some cases, farmers reported subsequent crop wilting and had to replant. Based on June field reports, it is estimated that area planted is 40 percent below average.

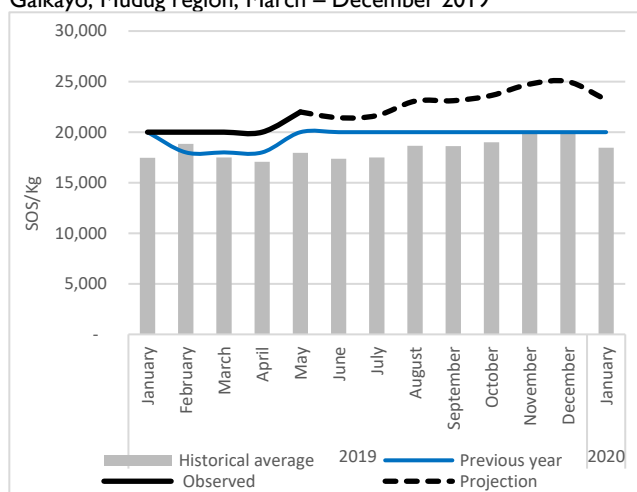
Pasture and water availability has increased average levels in response to May rainfall, according to NDVI, and this has driven positive improvements in livestock body condition and productivity. Most seasonal water catchments have been at least partially replenished, leading to gradual declines in water prices. However, although water prices declined by an average of 20-30 percent in May in most markets compared to April, prices remain 12-13 percent above average. Seasonal goat kidding

Figure 13. Observed and projected goat price in SOS, Galkayo, Mudug region, March – December 2019



Source: FEWS NET and FSNAU

Figure 14. Observed and projected rice price in SOS/kg, Galkayo, Mudug region, March – December 2019



Source: FEWS NET and FSNAU

and cattle calving are ongoing at medium levels for this livelihood zone, while the conception of goats and cattle are also medium. As a result, household milk consumption is estimated to be near average at approximately 1 liter per day, but little is left over for milk sales. The price of a local quality goat exhibits mixed patterns across markets, but is generally increasing due to improving body weight and higher demand during the Ramadan and Hajj season. In May, the goat price in Bay and Bakool was SOS 988,000 (US\$39). In comparison to the five-year average, this reflected a decline of 10 percent in Bay but an increase of 21 percent in Bakool.

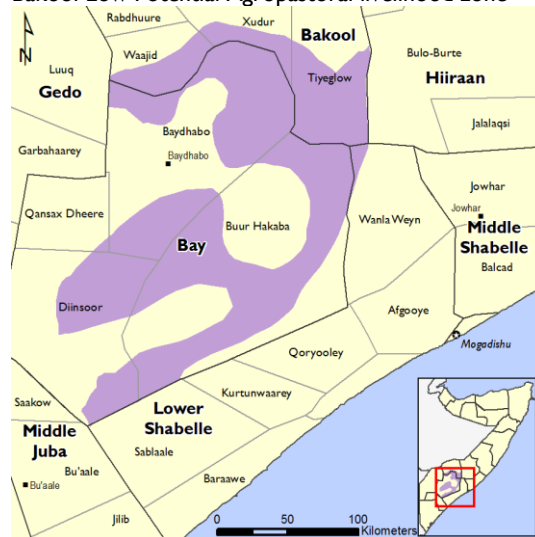
Low market supply due to below-average 2018/19 *Deyr* crop production, combined with insecurity, has limited cereal outflows from high potential to low potential areas and led to atypical increases in the price of sorghum in all reference markets. In May 2019, the price of sorghum in Bay regional markets was SOS 5,200/kg (US\$0.21/kg), which is 16 percent higher than May 2018 but 14 percent below than 5-year average. In Bakool, the sorghum price was SOS 13,000/kg (US\$0.50/kg), a decline of 7 percent compared to May 2018 but similar to the five-year average. The doubled price of sorghum in Bakool relative to Bay is due to a structural deficit and restricted trade because of insecurity.

Poor households' purchasing power is declining as shown by the declining terms of trade (ToT) between daily wage and sorghum. The agricultural labor wage has exhibited a declining trend in Bakool but has remained near-average in Bay. In Bay, the labor-to-sorghum ToT for May 2019 was 18kgs and is down by 5 percent from last year but is 6 and 13 percent above the previous month and the 5-year average. In Bakool, the labor-to-sorghum ToT is much lower at 4 kg per daily wage rate and is similar to last year and the average. There is however, good ToT between local quality goat and sorghum in both regions but largely favors the middle and the better off households. In Bay region on average, the sale of one local quality goat can buy 248kgs of sorghum, which is slightly above the average but slightly lower than last year. In Bakool, the goat-to-sorghum ToT is 76kgs in April 2019, up 19 percent and 15 percent from May 2018 and the 5-year average. However, due small herd size for poor households, they are unlikely to benefit from sale of livestock. Rural households outside of main markets, particularly where insecurity restricts trade, are also more likely to realize lower terms of trade.

Field observations during a May rapid assessment conducted by FEWS NET suggest that there is no significant population displacement ongoing from parts of Bay and Bakool toward urban towns within the regions, and to Mogadishu and other IDP locations such as Dolow in Ethiopia. There is, however, typical opportunistic migration in search of better water and pasture within the zone. Insecurity remains a challenge to agropastoral food security, limiting trade flow and mobility, increasing multiple illegal taxations, and restricting access to humanitarian assistance within and across these regions.

Poor households' food and income sources are significantly below average. Household cereal stocks were already exhausted by March or April, signifying an early start to the lean season. *Deyr* 2018 cereal production in Bay and Bakool was 23 and 25 percent below the five-year average, respectively; however, it is estimated that local production deficits in the Low Potential Agropastoral livelihood zone were up to 50 percent of average. The early exhaustion of food stocks has been compounded by poor availability of wild fruits and vegetables, due to erratic *Gu* rains. At the same time, household income is significantly below average. Due to reduced area planted and localized crop failure, agricultural labor demand is low, a source of income that usually accounts for 34-50 percent of their usual annual income. Non-agricultural daily wages in Baidoa, such as portering or construction work, have declined 16 percent compared to May 2018 and 6 percent from the five-year average.

Figure 15. Area of concern reference map, Bay-Bakool Low Potential Agropastoral livelihood zone



Source: FEWS NET and FSNAU

Figure 16. Failed sorghum crop in Baidoa, Bay region, June 2019



Source: FEWS NET

as an increasing number of urban poor and IDPs are competing for these opportunities. Most poor households keep very small herds, primarily rely on livestock for milk, and infrequently sell livestock. Although herd size data has not yet been collected since December 2018, it is assumed some poor households may have sold one goat and the average herd size remains similar to or has slightly increased from the *Deyr* at 6 sheep/goats and 3 cattle. According to FSNAU's nutrition survey in December 2018 and subsequent projections, it is assumed that acute malnutrition prevalence had deteriorated from Serious (GAM WHZ 10-14.9 percent) to Critical (GAM WHZ 15-29.9 percent) due to reduced milk and food consumption. With little or no food stocks, below-average income from farm labor, and declines in the terms of trade, it is expected that poor households face moderate food consumption gaps indicative of Crisis (IPC Phase 3) outcomes.

Assumptions

In addition to the national assumptions described above, the following assumptions are made about Bay-Bakool Low Potential Agropastoral livelihood zone:

- 50 percent of average *Gu* production is likely in July /August 2019 and will be delayed but at least one month.
- Based on current trends, the agricultural labor wage is expected to be near- to below average and the non-agricultural labor wage is expected to be below average.
- Based on current herd size and conception levels during the *Gu*, an average of one goat and one calf is expected to be born in November-December.
- Above average cereal prices through the outlook period in low potential rural markets due to below average *Gu* 2019 production and extended lean season and insecurity. According to FEWS NET's integrated price analysis in Baidoa reference market in Bay region, sorghum prices are expected to be 16 to 17 percent below the five-year average. Prices are projected to range from SOS 4886 to 5537/kg, peaking in November and then gradually declining through January.
- Driven by enhanced demand during May-August religious holidays livestock prices will likely follow seasonal trends through at least August. In addition, goat prices will likely be slightly above their 5-year average but close to last year levels. According to FEWS NET's integrated price projection in Baidoa reference market in Bay region, one local quality goat prices are expected to be 4 to 10 percent above the five-year average. Prices are projected to range from SOS 960, 118 to SOS 1,251, 083/kg, peaking in September and then gradually declining through February.

Most Likely Food Security Outcomes

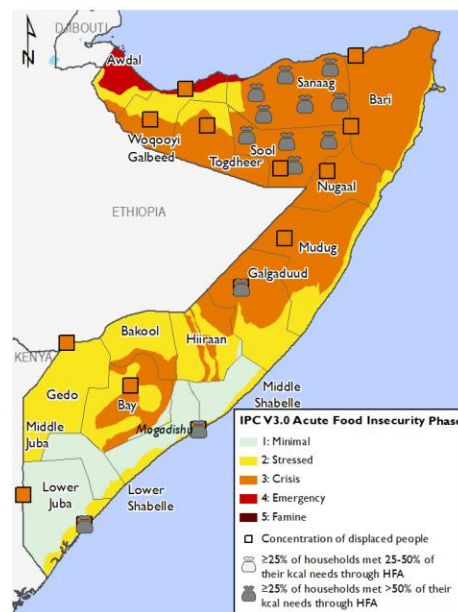
The availability of the *Gu* harvest is expected to provide only one to two months of food stocks for poor households beginning in July and August. With few food stocks and limited livestock/livestock product sales and milk consumption, households will maximize the use of credit facilities as well as seek support in the form of cash and food gifts from relatives. However, *zakat* in September is expected to be very limited due to crop failure and poor harvests. Debt levels are currently estimated at USD 88, compared to normal debt levels of USD 50. With constrained food and income sources, households are expected to increase the use and frequency of consumption coping strategies and increasingly engage in crisis coping strategies. Crisis (IPC Phase 3) outcomes are expected to be sustained, and it is anticipated that households in and/or on the border with Bakool will be worse off due to distance restricted access to markets and labor opportunities in high potential areas. It is also expected that acute malnutrition prevalence will be sustained at 'Critical' (GAM WHZ 15-29.9 percent) levels.

With the projected average Oct-Dec *Deyr* rains, households are expected to access normal agricultural labor opportunities when planting begins in October and are expected to cultivate average area planted. Both camel milk gifts and goat milk consumption and sales are expected to be available at typical levels, improving access to food purchases. However, moderate food consumption gaps are expected to persist throughout the lean season (Oct-Nov) due to the early exhaustion of household food stocks. Crisis (IPC Phase 3) is expected to be sustained until households begin to harvest green crops in late December, consisting of green maize and cowpeas. Wild food availability is also expected to increase. More substantial improvements in food security and acute malnutrition are not anticipated until the main harvests begin in mid-January.

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

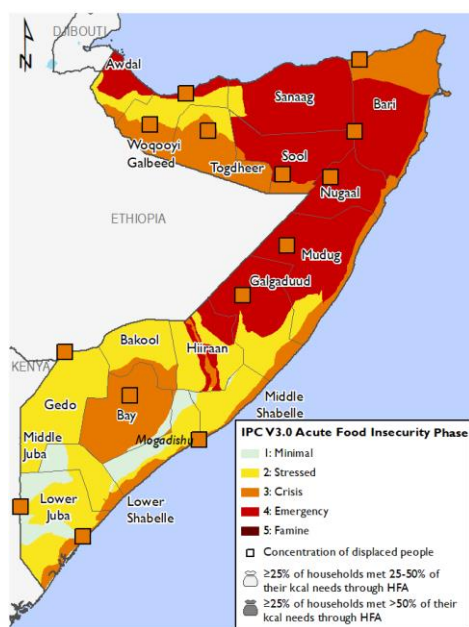
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☐ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). ☐ indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, June 2019



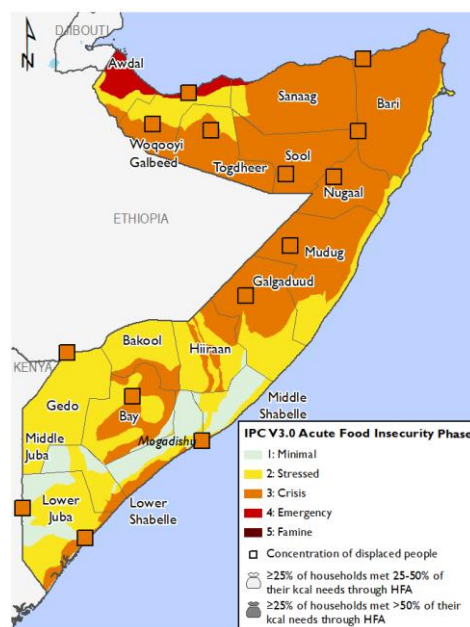
Source: FEWS NET/FSNAU

Projected food security outcomes, June – September 2019



Source: FEWS NET/FSNAU

Projected food security outcomes, October 2019 – January 2020



Source: FEWS NET/FSNAU

FEWS NET and FSNAU classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.