

Climate

Markets

Nutrition

Agriculture

Livestock

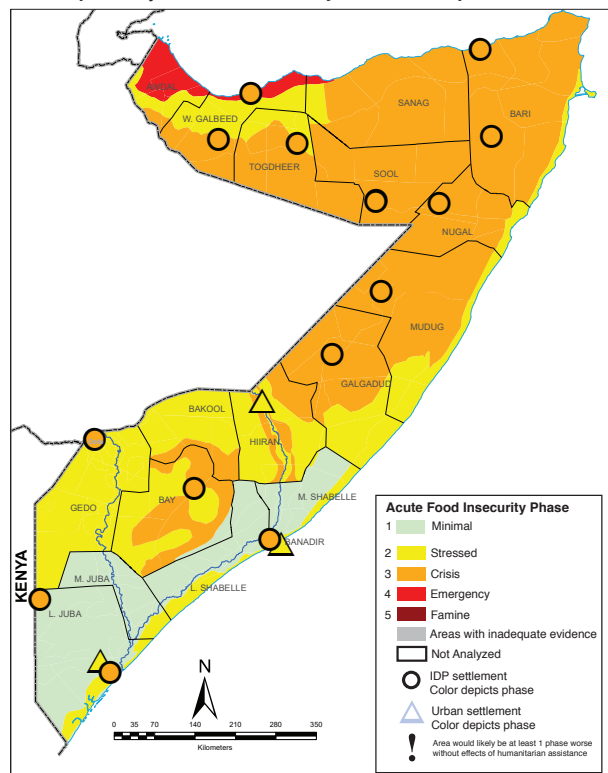
Civil  
Insecurity

Emerging  
Regional  
Issues

## KEY ISSUES

- Below-average rains across most of Somalia during the 2018 Deyr (October-December), followed by harsh weather conditions during the dry Jilaal (January-March 2019) season and the poor performance of the Gu (April-June 2019) rains in April, has led to worsening drought conditions in many parts of the country.
- This has caused deterioration in pasture availability and widespread water shortages in most pastoral and agropastoral livelihood zones, leading to earlier-than-normal water trucking, atypical livestock movements to watering points, and declines in livestock body conditions and milk production.
- The worst-affected areas include Northern Inland Pastoral (NIP), East Golis Pastoral, Addun Pastoral and Hawd Pastoral livelihood zones. In these areas, severe pasture and water deficits and early water trucking have been reported. The harsh Jilaal has also affected rural livelihoods in southern Somalia including Bay/Bakool Agropastoral and Southern Agropastoral of Hiran, although the impact is less severe compared to central and northern regions.

Map 1: Projected Food Security Outcomes, Apr-Jun 2019

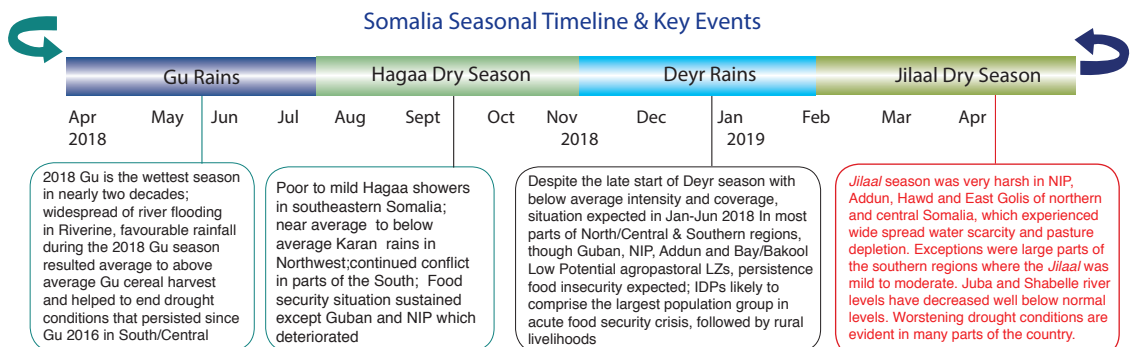


Source: FSNAU/FEWS NET

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- Limited saleable livestock assets, poor livestock body conditions, reduced access to milk, increased household expenditures on the rising cost of food and water, and overstretched social support networks have led to reduced food access. Further, humanitarian food assistance levels have significantly declined compared to the final quarter of 2018. As a result, food insecurity is worsening among pastoralists in northern and central Somalia.
- Since February 2019, both upstream and downstream water levels of the Shabelle and Juba rivers have remained very low. In some areas, river beds have dried out completely, due to prevailing drier-than-normal weather and high temperatures. This has led to extreme water scarcity for riverine communities. Off-season production in riverine areas was also 11 percent lower than estimates in January 2019.

### Somalia Seasonal Timeline & Key Events



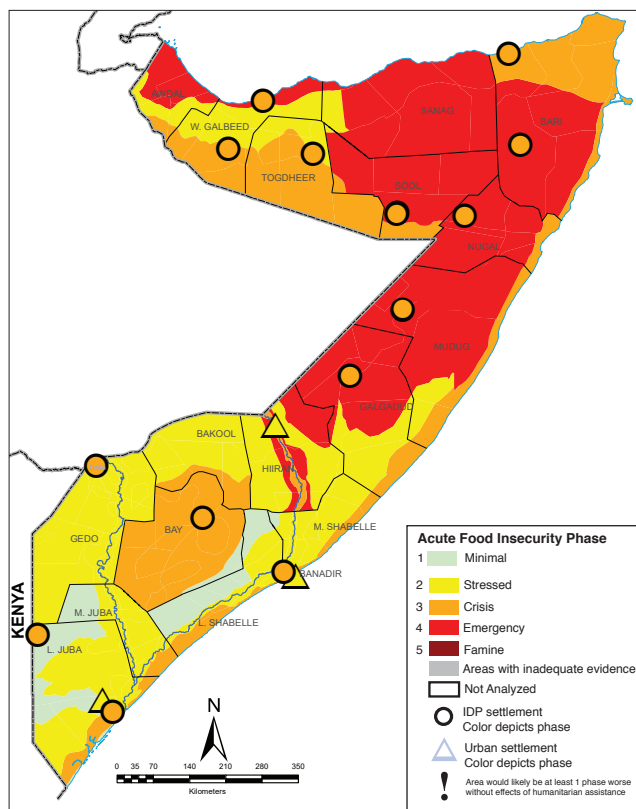
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- The delayed and poor start of the Gu rainfall season has shortened the length of the crop growing season. Given the shortened season, below-average Gu rainfall performance, and very low river levels to date, a significant reduction of 40-50 percent in aggregate seasonal cereal output is expected in July 2019. This scenario assumes the forecast of average to near-average rainfall in May-June in the crop growing areas of northwest and southern Somalia materializes.

- Consequently, food security outcomes in East Golis Pastoral of Bari; Hawd Pastoral of Nugaal, Mudug, Galgaduud and Hiiraan; and Addun Pastoral of Mudug have deteriorated from Stressed (IPC Phase 2) to Crisis (IPC Phase 3), as more households are expected to experience food consumption gaps through June 2019. Most southern regions remain Minimal (IPC Phase 1) or Stressed (IPC Phase 2), due to relatively better 2018 Deyr rains that supported crop production and near-average livestock holdings, though Stressed (IPC Phase 2) outcomes have become more widespread. The exceptions include Bay Bakool Low Potential Agropastoral and Southern Agropastoral of Hiiraan, where significantly below-average Deyr crop production led to Crisis (IPC Phase 3) outcomes (Map 1). Approximately 1.7 million people are now estimated to be in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) between April and June 2019, an increase of 10 percent from the previous projection of 1.55 million for February-June 2019. The number of people classified as Stressed (IPC Phase 2) remains 3.4 million.

Map 2: Projected food security outcomes, July-September 2019



Source: FSNAU/FEWS NET  
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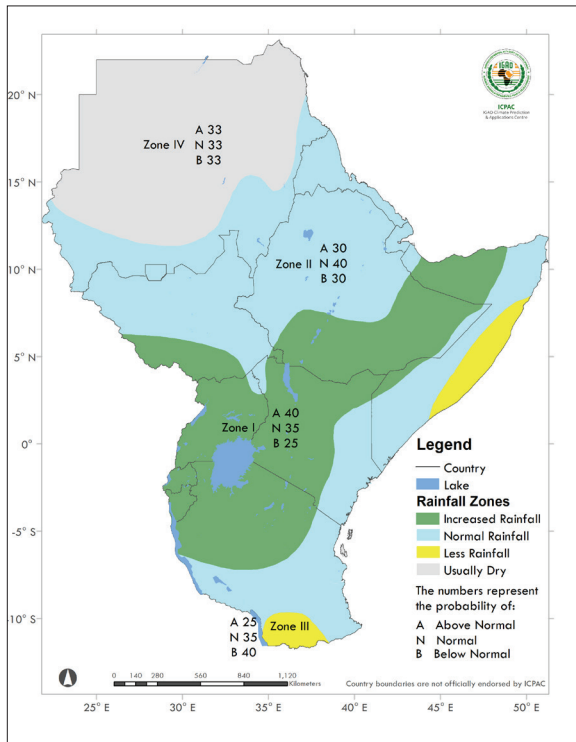
- Food security outcomes are expected to further deteriorate between July and September 2019, driven by the extensive impacts of the poor performance of *Gu* seasonal rainfall on resource availability and crop and livestock production (Map 2). In the most likely scenario, East Golis Pastoral of Sanaag, Northern Inland Pastoral, Addun Pastoral, Hawd Pastoral of northeast and central regions, and Southern Agropastoral livelihood of Hiiraan region will deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) as food consumption gaps grow, due to significant reductions in food and income sources coupled with progressive erosion of people’s coping capacities. Emergency (IPC Phase 4) will also persist in Guban Pastoral. Meanwhile, East Golis Pastoral of Bari, Coastal Deeh Pastoral and Fishing, Sorghum High-Potential Agropastoral of Bay, Southern Rainfed Agropastoral livelihood zones will deteriorate from Stressed (IPC Phase 2) to Crisis (IPC Phase 3). Most of the rest of the country is classified as Stressed (IPC Phase 2). Accordingly, the overall number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) is expected to increase to approximately 2.2 million through September 2019, with an additional 3.2 million people classified as Stressed (IPC Phase 2).
- In the worst case scenario where the Gu rains continue to perform poorly through the remainder of the season in May and June, further worsening of food security and nutrition outcomes would be likely due to widespread crop failure resulting in deficits of more than 50 percent, a significant increase in livestock losses and significant population displacement. As a result, food security outcomes would likely deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) in Sorghum High-Potential Agropastoral of Bay and Bakool and from Stressed (IPC Phase 2) to Crisis (IPC Phase 3) in Southern Agropastoral, Riverine Pump-Irrigation and Riverine Gravity Irrigation livelihood zones, leading to further increases in the number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4).

# SECTOR HIGHLIGHTS

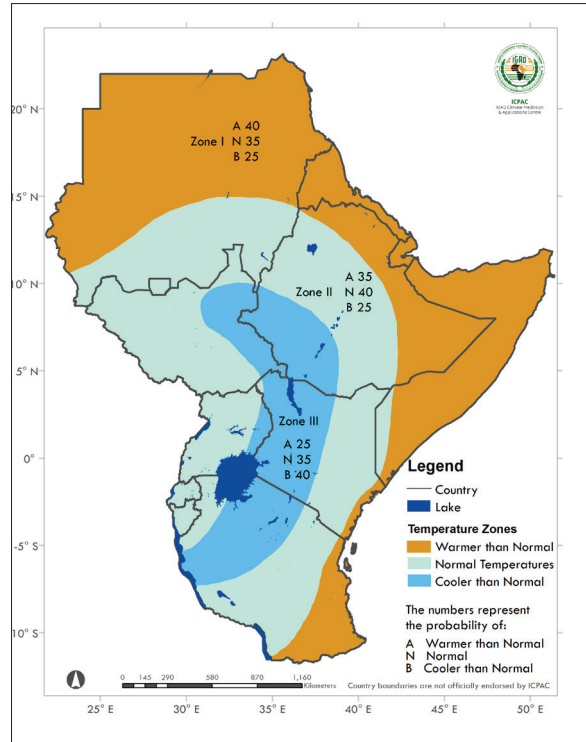
## CLIMATE

The Greater Horn of Africa Climate Outlook Forum (GHACOF51) statement, issued on 12 February 2019, had indicated a greater likelihood of near-normal to above-normal rainfall in most of northern and southern Somalia between March and May 2019 (Map 3), with near-normal to below-normal rainfall expected in coastal and adjacent parts of Nugaal, Mudug, Galgadud, Middle and Lower Shabelle regions. GHACOF51 had also forecast warmer-than-normal temperatures across most parts of Somalia between March and May 2019 (Map 4).

**Map 3: March-May 2019 Rainfall Outlook**



**Map 4: March-May 2019 Temperature Outlook**

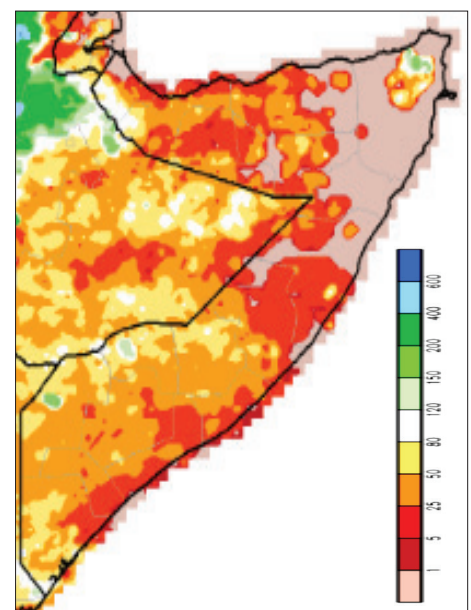


Source: GHACOF51/IGAD

The 2019 January-March Jilaal was much drier than normal due to the below-average October-December 2018 Deyr short rains in most parts of Somalia. Central and northern regions experienced extreme temperatures, while in the South the Jilaal was relatively less severe. Above-average temperatures led to accelerated depletion of water and deterioration of rangeland resources which negatively impacted livestock body conditions, production and reproduction. The worst-affected areas include Northern Inland Pastoral (NIP), East Golis Pastoral, Addun Pastoral and Hawd Pastoral livelihood zones. In these areas, drastic pasture deterioration and water scarcity and early water trucking at abnormally high prices were reported. The harsh Jilaal season has also affected rural livelihoods in southern Somalia, although the impact is less severe compared to central and northern regions.

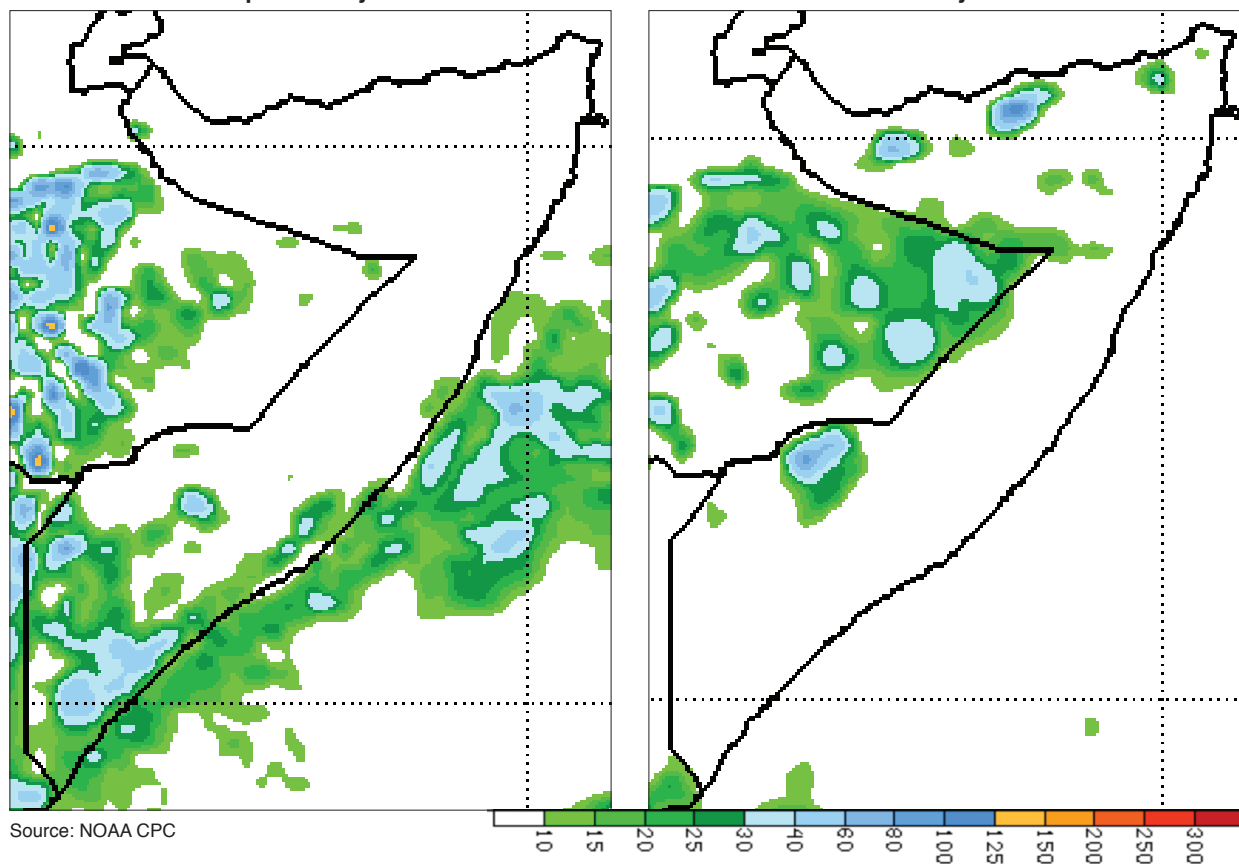
Contrary to the original forecast, Gu (April-June) seasonal rainfall started late and through the first three and half weeks of April performed poorly across the country (Map 3). According to the IGAD Climate Prediction and Application Center (ICPAC), a tropical cyclone observed across the coast of Mozambique during the first and second week of March 2019 partially contributed to the current dry conditions observed in the horn of Africa region, including Somalia, by redirecting precipitation away from East Africa. FSNAU field reports and satellite-derived rainfall estimates (RFE) confirm that localized light to moderate showers fell in Awdal, Woqooyi Galbeed, Shabelle, Gedo and Juba regions between late March and late April. Although the two-week forecast ending on the 9th of May indicates little rainfall between late April and the first week of May across most parts of the country (Map 4). Extremely low water levels have been reported in riverine livelihood zones along the Shabelle and Juba rivers, especially starting from Jowhar of Middle Shabelle upto the downstream areas of Lower Shabelle

**Map 5: Actual Rainfall as Percent of Normal, 27 March-25 April 2019**



Source: NOAA CPC

**Map 6: Rainfall Forecast (mm)**  
25 April - 2 May 2019



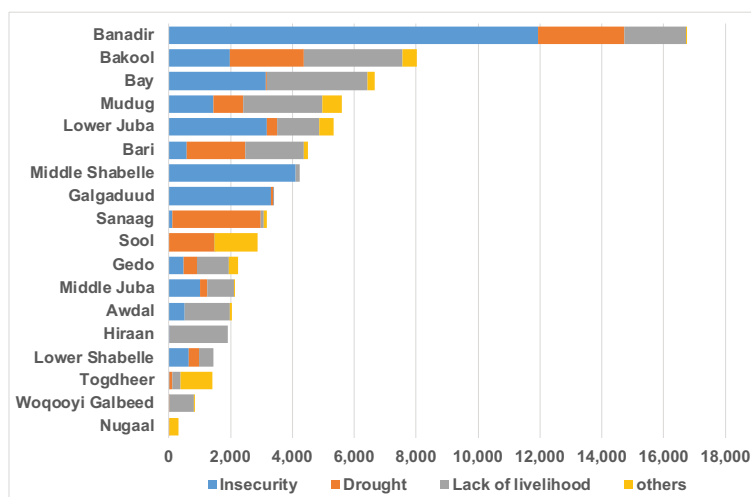
**CIVIL INSECURITY**

Between January and March 2019, incidences of insecurity from military engagements (armed confrontation), targeted killings of prominent politicians, suicide bomb explosions which targeted state and civilian institutions and installations have escalated in southern Somalia, especially in Mogadishu (Banadir Region) and Bossaso (Bari Region). Other areas affected by insecurity include Mudug, Galgaduud, Bay, Bakool, Hiraan, Lower Juba, and Middle and Lower Shabelle that have been affected by renewed clan based conflicts in addition to the violent and protracted insurgency that has plagued these regions.

Insecurity has resulted in disruptions of trade flows (mainly in Bakool region—Hudur and Wajid and parts of Lower Shabelle), forced collection of zakat and illegal taxation including extortion and kidnapping of elders and humanitarian workers for ransom. According to UN-OCHA, the volatile and unpredictable situation in the country continues to hamper the ability of humanitarians to reach people in need and sustain their operations among the affected populations.

Data from UNHCR indicates that an estimated 72 869 people were displaced between January to March 2019. A majority (45%) have cited insecurity as the main cause, mainly affecting rural areas of Middle and Lower Shabelle, Galgaduud, Bay, Bakool and Juba regions. Other major reasons for the reported level of displacement are lack of livelihoods (29%) and drought (19%).

**Figure 1: Population Movement: Arrivals, January-March 2019**



Data Source: UNHCR/PRMN

## AGRICULTURE

An assessment conducted by FSNAU in March 2019 indicated that a total of 6 600 tonnes of off-season maize, sesame and cowpea crops were harvested in riverine livelihoods of southern Somalia between late February and early March 2019 (Table 1). The 2018 *Deyr* off-season maize harvest is lower compared to the average for 2013-2017 in Lower Juba (-25%), Gedo (-22%) and Middle Juba (-64%) mainly due to the abnormal decrease in river water levels that occurred towards the end of the growing season.

**Table 1: 2018/19 *Deyr* Off-Season Crop Harvest Estimates, March 2019**

Region	Maize		Cowpea	Sesame
	Production (MT)	5-years- Average Production (MT)	Production (MT)	Production (MT)
Low Juba	300	400	350	450
Gedo	700	900		
Middle Juba	500	1,400	100	1 300
Middle Shabelle	2 600	500		400
<b>Total</b>	<b>4 100</b>	<b>3 200</b>	<b>450</b>	<b>2 150</b>

Data Source: FSNAU

The 2019 *Gu* (April-June) season agricultural activities (land preparation, dry planting and ridging for rainwater harvesting) have started in late March in most of the main crop growing areas of southern Somalia in anticipation of the normal start of *Gu* rains in April. However, farming activities in riverine areas of Shabelle and Juba were hampered due to unusual high temperatures and the severe water shortage in the Shabelle and Juba Rivers. The very low river level has affected fruit trees and vegetables as well as early irrigation of maize in riverine livelihood zones. In the crop-growing areas of agropastoral livelihood zones of the Northwest (Awdal and Woqooyi Galbeed), where the *Gu/Karan* harvest has been poor for several consecutive seasons over the past two years, land preparation activities began at a normal pace with the start of the *Gu* rainy season in late March. In the crop-growing areas in Cowpea Belt Agropastoral livelihood zone of central Somalia, land preparation and planting have been significantly delayed.

The *Gu* rains which started late in many areas have performed poorly in the first three weeks of April. Although available monthly forecasts indicate average to near-average rainfall in May-June in the crop growing areas of northwest and southern Somalia, recent weekly rainfall forecasts through the first week of May only show a minor improvement in the situation although the monthly forecast for May and June. Even if *Gu* season rainfall improves starting in the second week of May, the negative impact poor rainfall performance thus far has effectively shortened the length of the crop growing season. In all crop growing areas of the country, the amount and spatial and temporal distribution of *Gu* season rainfall thus far has been poor, with crop germination reported in less than a third of the area planted with cereal crops across the country by late April. With limited seed reserves, many farmers have also been reluctant to plant crops during the current *Gu* season due to the delayed start and erratic nature of the rainfall. As a result, a significant production decline (40-50 percent) is expected in the July/August aggregate cereal harvest compared to the long-term average for 1995-2018. In a worst-case scenario in which the *Gu* rains continue to perform poorly in May, widespread crop failure would be likely in many areas, with aggregate cereal production declines of more than 50 percent compared to the long-term average.



*Land prepared for 2019 Gu crop planting in riverine, Beletwein - Hiran region, FSNAU, March 2019*

## LIVESTOCK SECTOR

As a result of below average to poor 2018 *Deyr* rains and warmer-than-normal temperatures since January, the impact of the dry *Jilaal* (January – March 2019) season was much worse than previously anticipated in most of the pastoral and agropastoral livelihood zones of Somalia. Atypical high temperatures since late January led to accelerated depletion of pasture and water resources in most of the rural livelihood zones, particularly in northern and central regions. Several parts of southern Somalia have also been adversely affected.

Rapid deterioration and depletion of pasture and browse was reported in Hawd Pastoral, Addun Pastoral, East Golis Pastoral, Southern Agropastoral of Hiiraan and Juba, Bay/Bakool Low Potential Agropastoral, Coastal Deeh Pastoral of Middle Shabelle, Rainfed Agropastoral of Shabelle and Juba, and Cattle and Goats Juba Pastoral livelihood zones. The worst-affected livelihood zones are Hawd Pastoral, Addun Pastoral and East Golis Pastoral.

Water scarcity has been reported in many parts of the country, in both rural and urban areas. Widespread water trucking at abnormally high prices were reported in many of the pastoral, agropastoral and urban centers of the country. At the end of March, most of the natural water catchment and *Berkeds* have dried up, while shallow wells have also dried up or the water yield has shrunk due to the reduced ground-water table and overuse during the harsh *Jilaal* season.

Most livestock are concentrated near water points, with limited migration options. Exceptions are livestock that belong to wealthier households, who have kept their livestock near dry pasture grazing areas and are able to afford water trucking for their animals. Pastoralists have also resorted to an expensive form of livestock feeding, providing animals with cereal grains in northern and central regions and crop fodder in southern regions due to increasing scarcity of dry pasture. Cases of livestock abortion and death of small ruminants due to insufficient feed, water and drought-induced disease have been reported in parts of northern (Bari and Sanaag) and central (Galgaduud) regions.

In some parts of the county, including West Golis Pastoral, parts of Hawd Pastoral of Toghddeer and Sool regions, Cowpea Belt and Coastal Deeh Pastoral of central regions and most parts of southern regions that had relatively better rainfall performance during the 2018 *Deyr* season, the *Jilaal* was relatively less severe in terms of pasture and water availability. In these areas, observed declines in livestock body condition and milk production during the *Jilaal* season are only slightly worse than normal seasonal trends.

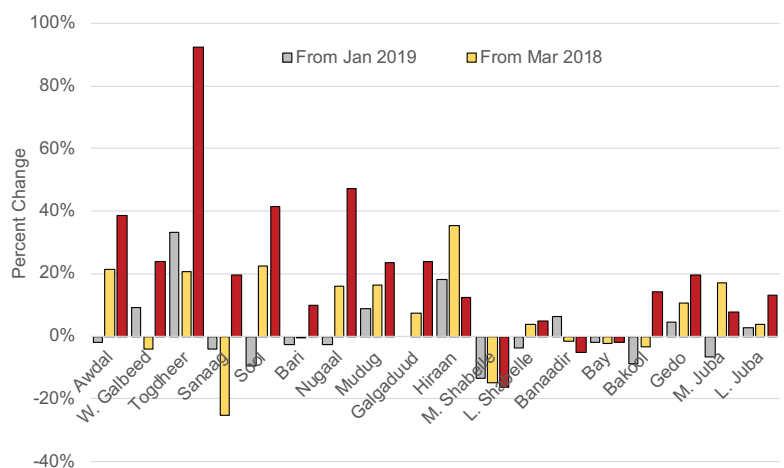
In general, current livestock body conditions are mostly below average to near average (PET scores 2-3) and exhibit a deteriorating trend. The body condition of livestock in northern and central regions affected by poor rainfall and the body condition of lactating livestock are poor in general (PET score 2). In parts of northern and central regions that have experienced severed water and pasture shortages, low kidding/lambing of small ruminants was reported at the end of the *Jilaal* season, in contrast to the medium kidding/lambing that was anticipated based on the outcome of the 2018 post-*Deyr* analysis. Livestock abortions and culling of newborns have also been reported in some of these areas.



Poor Body condition ( PET 1), East Golis Pastoral, Laas-qoray district, Sanaag region, FSNAU, April 2019

Between January and March 2019, livestock prices showed mild to moderate increases in most markets. Goat prices increased mildly (less than 10 percent) in most parts of the country, apart from Hiiraan region where goat prices showed a moderate increase of 18 percent. These price increases are mainly attributed to reduced supply of livestock in the market, driven by below-average livestock holdings in northern and central regions and exacerbated by the declining availability of livestock with good body conditions. Compared to the five-year average, goat prices mostly showed a mild to moderate increase, with the highest increase (42 percent) reported in the northwest.

Figure 2 . Changes in Local Quality Goat Prices for March 2019 (%)



Source: FSNAU and FEWS NET

Local quality cattle prices in southern Somalia showed moderate increases (10-17 percent) in Middle and Lower Shabelle during the first quarter of 2019, consistent with seasonal trends. Elsewhere, prices mildly declined (less than 8 percent) during the same period. Compared to the five-year average, prices of local cattle in southern Somalia mostly showed mild declines (less than 12 percent), except in Middle Shabelle where cattle prices increased moderately (15 percent). In the northwest, the price of local quality cattle declined by 6 percent between January and March 2019 but increased by 29 percent compared to the five-year average.

## MARKETS AND TRADE

### Exchange Rate Trends

Between January and March 2019, the Somali Shilling (SOS) was stable against the U.S. dollar (USD). In Mogadishu's Bakaara, for example, 1 USD was traded at around 24 400 SOS in March 2019, which is similar to levels observed in January 2019 (24,375 SOS). On the other hand, the Somaliland Shilling (SLS) gained about 5 percent against the USD between January-March 2019 due to measures taken by government to boost the Somaliland Shilling (e.g. ban on dollar transfer amounts of less than USD 100 over mobile phone platforms).

### Cereal Imports and Commodity Price Trends

Cereal availability remains relatively stable in most southern reference markets, due to continuing availability of stocks from the 2018 Deyr main and off-season harvests. Despite this, cereal prices have shown mixed trends in the crop-producing regions of southern Somalia. Between January and March 2019, maize prices increased moderately in Lower Shabelle (by 17 percent), Middle Shabelle (by 28 percent) and Juba (by 13 percent). In March 2019, the lowest maize prices were recorded in Diinsor (3 100 SOS/kg) and Qansaxdhere (5 000 SOS/kg) of Bay Region, while the highest prices were in Belet Hawa (15 000 SOS/kg) of Gedo region. In contrast, sorghum prices decreased slightly in Hiiran (5 percent) between January and March 2019, while sorghum prices remained relatively stable in Bay and Bakool region over the same period. However, below-average harvests and limited trade movement due to prevailing insecurity has resulted in sorghum price increases in Gedo region (17 percent) since January 2019. In northwest regions (Awdal, Woqooyi Galbeed and Togdheer), sorghum prices remained mostly stable between January and March 2019. In March 2019, the lowest sorghum price was reported in Dinsor (2 350 SOS/kg) of Bay region, while the highest prices were recorded in Elbarde of Bakool (18 000 SOS/kg).

In the first quarter of the year, most imported food items were stable in most markets of the country, except in some northern markets that have been affected by depreciation of the Somali Shilling against the U.S. Dollar. The prices of imported food commodities (rice, wheat flour, sugar and vegetable oil) were either stable or changed at mild rates in most markets since January 2019 due to stable supply as well as continued humanitarian food distribution.

Between January and March 2019, imports through cross-border trade from Ethiopia to central and northern Somalia were estimated at 2,392 tons of sorghum and maize. Stable supply from eastern Ethiopia to central and northern Somalia contributed to normal availability of sorghum in these regions. During the first quarter of 2019, an estimated 28 651 tons of food items (sugar, wheat flour and rice) that were originally imported through the ports of Somalia were re-exported to Ethiopia and Kenya.

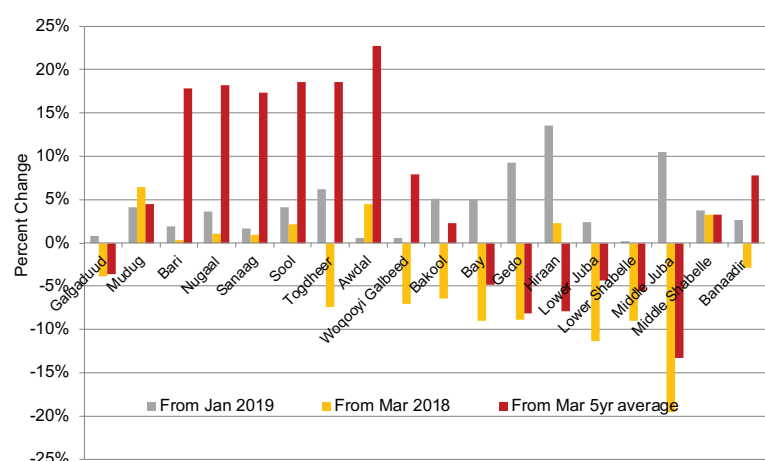
### Consumer Price Index (CPI)

The Consumer Price Index (CPI), measured through changes in the cost of items in the Minimum Expenditure Basket (CMEB) in the main markets across Somalia increased slightly (2-6 percent) during the first three months of 2019. This is due to increased cereal prices as a result of below average 2018 Deyr cereal harvest and the increased price of water

### HUMANITARIAN ASSISTANCE

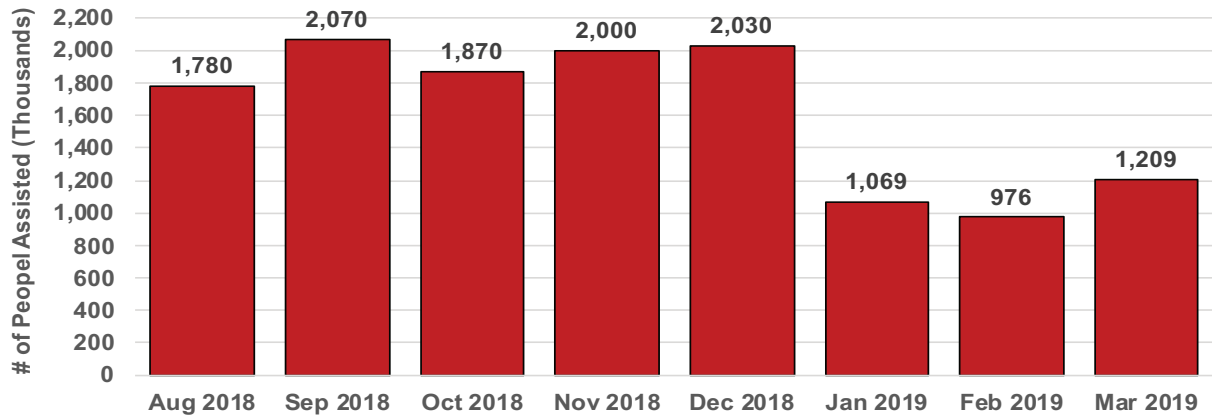
Due to funding constraints, the number people receiving food assistance has declined by as much as 50 percent since the beginning of 2019 compared to the level of assistance provided between July and December 2018. Data from the Somalia Food Security Cluster indicates that an average of 1.1 million received humanitarian food assistance during the first quarter of 2019, down from an average of 2 million between July and December 2018. This level of food assistance is far below what is needed to cover the large and growing needs in Somalia.

Figure 3. March 2019 Cost of Minimum Expenditure Basket (CMEB): % Change



Source: FSNAU and FEWS NET

**Figure 4: Food Assistance, August 2018-March 2019**



Source: Somalia Food Security Cluster

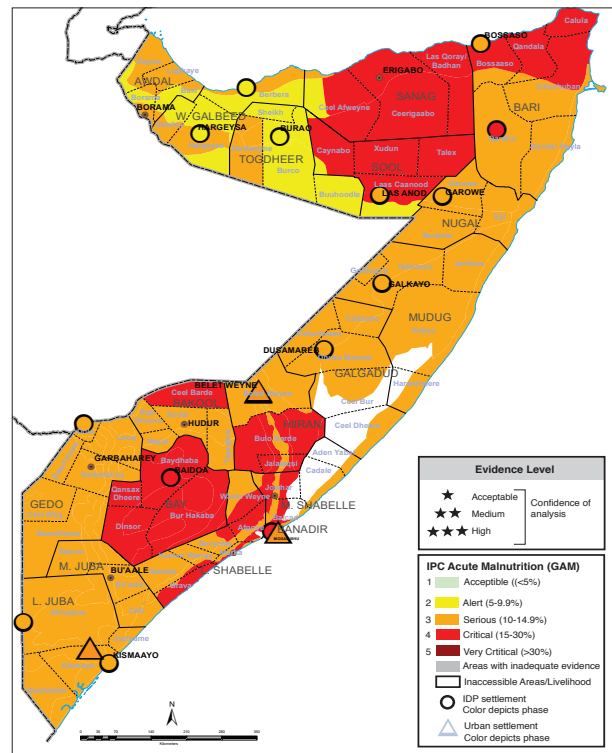
**NUTRITION**

Consistent with the analysis made in January 2019 by FSNAU and partners, the nutrition situation outlook for February to April 2019 is likely to have deteriorated in Guban Pastoral livelihood zone from Alert (Global Acute Malnutrition-GAM 5-9.9percent) to Serious (GAM 10-14.9percent) due to poor 2018 Xays rains (December-January), limited humanitarian assistance and a harsh *Jilaal* that led to reduced access to milk. Similar deteriorations are expected in Northwest Agro-pastoral, Addun Pastoral, and Buloburte and Jalalaqsi districts of Hiran region. In Bay Agro-pastoral livelihood where the nutrition situation was Serious (GAM 10-14.9 percent) in January 2019, malnutrition is likely to have deteriorated to Critical (GAM 15-29.9 percent) between February and April 2019, due to reduced access to food on account of the below-average 2018 *Deyr* harvest, declining humanitarian assistance, and increasing morbidity levels related to water shortages.

Based on Early Warning-Early Action data obtained from the Somalia Nutrition Cluster, abnormal increases in the monthly admission of acutely malnourished children has been reported in the following districts: Addado and Elbur (Galgadud), Buloburto (Hiran), Jowhar (Middle Shabelle) and Mogadishu (Banadir).

Somalia is currently experiencing worsening drought conditions. If the situation does not improve, widespread water shortages across most parts of the county, coupled with high water prices, is likely to compromise water and sanitation and contribute to outbreak of diseases such as Acute Watery Diarrhea (AWD) and cholera. This in turn could lead to worse nutrition outcomes and increased mortality.

**Map 7: Projected Nutrition Situation: February-April 2019**



*Donkey carts in queue for water collection point in the center of Baidoa town Bay region, FSNAU –March 2019*



## INTEGRATED FOOD SECURITY ANALYSIS

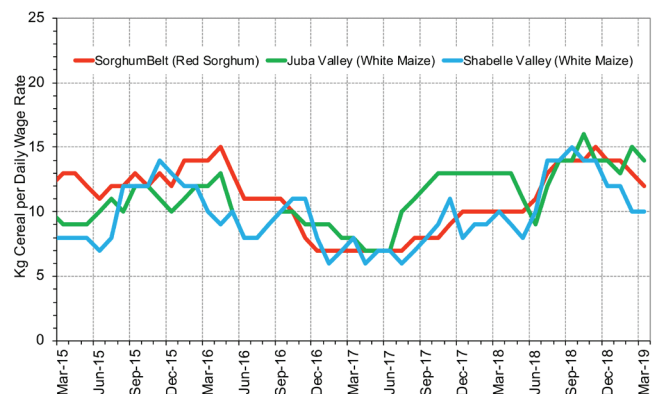
### URBAN

Due to high dependence on food access through market purchases, the main determining factor for urban food security in Somalia is the cost of living as measured by the Cost of Minimum Expenditure Basket (CMEB) and by the terms of trade (ToT) between the daily casual labor wage and cereal prices. Between January and March 2019, there have been mild (less than 10 percent) increases in CMEB in most regions of the country, except in Hiiraan and Middle Juba where moderate increases have been reported (11 percent and 14 percent, respectively). These increases in CMEB are due to increases in the price of cereals and water. Compared to five-year average, March 2019 CMEB has exhibited a mixed trend with mild to moderate decreases in most central and southern regions (<15percent) but moderate increases (19-23percent) in most of the northern regions.

Daily casual labor wages changed at mild rates (by less than 10 percent) in most regions of the country in the first quarter of 2019. Compared to the five-year average, casual labor wages rates have increased (15-49 percent) in most regions, with the exception of the Shabelle Valley and the Sorghum Belt (Hiraan, Bakool, Bay and Gedo) where wage rates remained relatively stable. The increase is attributed to increased construction activities in urban areas and relatively improved agricultural employment opportunities (land preparation and dry sowing works) in the surrounding rural areas.

In the first quarter of 2019, the purchasing power of urban households in southern regions – as measured by the terms of trade (ToT) between daily casual labor wages and cereal prices – has mostly declined at mild to moderate levels (by 1-4 kgs/daily wage), mainly due to increasing cereal prices. However, ToT has remained relatively stable or changed at mild rates (by +/-1 kgs/daily wage) in most central and northern regions. A comparison with the five-year average indicates relative stability or mild increases in ToT in most regions of the country, apart from Banadir (Mogadishu) where ToT declined moderately (by 8 kgs/daily wage) due to declining labor wage rates due to increasing completion for casual labor employment within Mogadishu.

**Figure 5: Regional Trends in Casual Labor Wage to Cereal Terms of Trade**



Source: FSNAU and FEWS NET

Since the 2018 *Deyr* cereal harvest was below average and prospects for the 2019 *Gu* cereal harvest are poor, cereal prices are likely to increase further in the coming months. This in turn is expected to lead to both deterioration in the casual labor-to-cereals ToT and an increase in the CMEB, thereby adversely affecting the food security of market-dependent urban and displaced populations.

The worsening drought condition has also adversely affected some of the Internally Displaced Persons (IDPs) in both urban and rural areas as they experience declining incomes and rising costs of food and water, exacerbated by reduced access to humanitarian assistance.

As reflected in the February to June 2019 IPC consensus food security outcome projection, acute food insecurity in urban areas of Somalia has either remained relatively stable or has slightly deteriorated since February 2019.

Rising costs of food and water, limited employment opportunities and reduced access to humanitarian assistance are also affecting Internally Displaced Persons (IIDs). Most of the major IDP settlements across Somalia have been classified as Crisis (IPC Phase 3), in the 2018 post-Deyr analysis will remain in Crisis (IPC Phase 3) through June 2019. However, because of the deteriorating conditions, Garowe IDPs that have been previously classified as Stressed (IPC Phase 2) are currently in Crisis (IPC Phase 3). However, increases in the number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) are expected in IDP settlements affected by the drought (i.e. IDP settlements in northern and central Somalia, including Mogadishu) through June 2019.

In the most likely scenario for July to September 2019, further increases are expected in the number of IDPs in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) across Somalia as the overall food security and nutrition situation in the country worsens.

**RURAL**

**NORTHERN REGIONS**

The dry Jilaal season was harsh in most rural livelihood zones in northern regions, which were already affected by poor rainfall during the 2018 Deyr season. Water and pasture scarcity is evident in most of the northern pastoral and agropastoral livelihoods. Earlier-than-normal and widespread water-trucking have been reported in all Berkad-dependent pastoralist livelihood zones (Northern Inland Pastoral, Addun Pastoral, parts of Hawd Pastoral, East Golis Pastoral) and Toghdeer Agropastoral livelihood zones.

In most northern regions, water prices have increased two to three times (\$7 to \$ 8 per 200-liter barrel) compared to typical water prices (\$2 to \$3). Most livestock are concentrated near water points, with limited migration options. Exceptions are wealthier households who have kept their livestock in areas where dry pasture and is still available and they are able to afford expensive trucked water for both human and livestock consumption. In addition, pastoralists in northern regions have also resorted to feeding cereal grains in northern regions as available dry pasture has become scarce. Cases of livestock abortion and death of small ruminants due to insufficient feed, water and drought-induced disease have been reported in parts of northern regions (Bari and Sanaag).

Some northern livelihood zones including West Golis Pastoral and parts of Hawd Pastoral of Toghdeer and Sool regions that had better rainfall performance during the 2018 Deyr season have experienced a relatively less severe Jilaal in terms of pasture and water availability. Therefore, observed declines in livestock body condition and milk production during the Jilaal season are only slightly worse than normal seasonal trends.

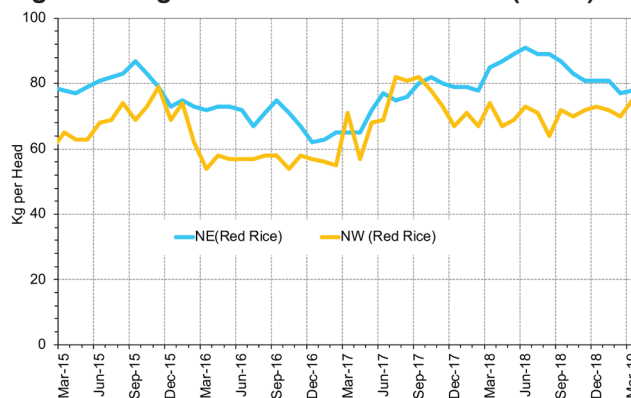


*Poor Body Condition. Northern Inland Pastoral, Qardho district, Bari region, FSNAU, March 2019*

Livestock conditions are poor to average (PET score 2-3) in most parts of the north. In the worst-affected areas, lactating livestock have poor (PET score 2) body condition due to shortage of water and pasture. Cases of abortion and livestock death/small ruminants due to insufficient feed, water and drought related disease have been reported in Northern Inland Pastoral, parts of Hawd Pastoral and East Golis Pastoral. Livestock mortality is likely to increase if the Gu rains continue to perform poorly as weak animals (young kids/lambs and milking animals with poor body condition) will start to die in large numbers.

In March 2019, most of the livestock prices increased compared to all reference periods (January 2019, March 2018 and five-year average). Goat prices increased by 9 percent in the northwest but declined by 4 percent in the northeast during the first quarter of 2019. The price increases are symptomatic of tight supply, driven by reduced livestock holdings and deteriorated livestock body conditions. Similarly, local quality goat prices are higher compared to a year ago and to the five-year average in most northern markets. Similarly, local quality cattle price in the northwest showed a mild increase of 2 percent between January and March 2019. March 2019 local quality cattle prices in the northwest are also 29 percent higher compared to the five-year average, due to the limited supply.

**Figure 6: Regional Trends Cereal to Goat (North)**



Source: FSNAU and FEWS NET

March 2019 rice prices indicate a mild to moderate increase in most of the northwest markets compared to prices in

January 2019 and the five-year average, whereas rice prices in the northeast remained stable in the first quarter of the year but showed moderate increases (19 percent) compared to the five-year average. As a result, ToT between goats and rice increased by 4 percent (from 72 to 75 kg/head) in the northwest but declined 4 percent (from 81 to 78 kg/head) in northeast, mainly due to the aforementioned decline in goat prices in the northeast in March compared to January 2019. The ToT for goats to white sorghum increased 7 to 20 percent (i.e. from 96-99 to 86-103 kg/head) in the two comparison periods in the northwest, mainly due to the increase of goat prices. Likewise, the March 2019 ToT between goats and red sorghum in the northeast showed a mild decline of 3 percent since January 2019, but an increase of 19 percent (from 53 to 63 kg/head) compared to the five-year average.

Land preparation and planting for the Gu/Karan 2019 cropping season was in progress in Northwest Agropastoral of Woqooyi Galbeed and Toghdeer Agropastoral in anticipation of the start of the Gu rains in April. However, the Gu rains which started in localized areas in late March have performed poorly so far and this is expected to adversely affect sorghum and maize production that is expected in July (maize) and October/November (sorghum). The extent of damage will depend on whether the Gu rains continue into May and June and the performance of Karan rains in August/September.

Based on the outcome of the 2018 post-Deyr analysis, northern livelihood zones that were classified as Crisis (IPC 3) include Northwest and Togdheer Agropastoral, Hawd Pastoral, Northern Inland Pastoral, and East Golis Pastoral of Sanaag region and Addun Pastoral. Exceptions were West Golis Pastoral of northwest regions and East Golis of Bari region, which were classified as Stressed (IPC 2), and Guban Pastoral, which was classified as Emergency (IPC 4). However, drought-affected poor pastoralists in northern regions have experienced reduced access to milk, and they are now spending more on food and water and have few saleable animals to finance their purchases. As a result, they are currently experiencing food consumption gaps. Accordingly, food security outcomes in some northern rural livelihoods have deteriorated from Stressed (IPC 2) to Crisis (IPC 3) in East Golis of Bari region. In all rural livelihoods that have been classified in Crisis (IPC Phase 3), increases in the number of people classified in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) are expected.

In the worst case scenario where the Gu rains continue to perform poorly through the remainder of the season in June, food security and nutrition outcomes would deteriorate further in northern rural livelihoods.

## CENTRAL REGIONS

In the *Jilaal* period, key pastoral livelihoods of central regions have experienced prolonged harsh *Jilaal* season. Pasture and water sources are almost depleted in Hawd of Adado, Dhusa-mareeb and Cabud-waq districts and Addun of Dhusamareeb district due to poor rainfall during the 2018 *Deyr*, high temperature and limited migration options. Field reports confirmed high indebtedness of poor pastoral households due to earlier than normal and prolonged water trucking that started from mid-February 2019, coupled with high water prices in most *Berked* dependent areas of Hawd, parts of agro pastoral Cowpea Belt and Addun livelihood zones. Due to the harsh *Jilaal*, livestock body conditions deteriorated to poor or are below average (PET 2-3). In areas that experienced rainfall deficits, cases of abortion and livestock deaths have been reported, particularly among lactating livestock and offspring of small ruminants. More livestock losses are likely if 2019 *Gu* rains continue to perform poorly. Livestock reproduction, milk availability and saleable animals are very limited among poor pastoral households of these livelihood zones.

Conversely, a moderate *Jilaal* was reported in Coastal Deeh Pastoral and large parts of Cowpea Belt Agropastoral due to favorable 2018 *Deyr* rains. In these livelihoods, observed declines in pasture and water availability, livestock body condition and milk production are only slightly worse than normal seasonal trends. Livestock holding of the poor households in most of the livelihoods in central region remains well below baseline levels due to low conception of among small ruminants during the 2018 *Deyr*, abortion and deaths reported during the current *Jilaal*. Debt levels are still high in all livelihoods: Hawd (USD 550), Addun (USD 450), Coastal Deeh (USD 500) and Cowpea-Belt (USD 533), with limited possibility of repayment before the end of 2019.

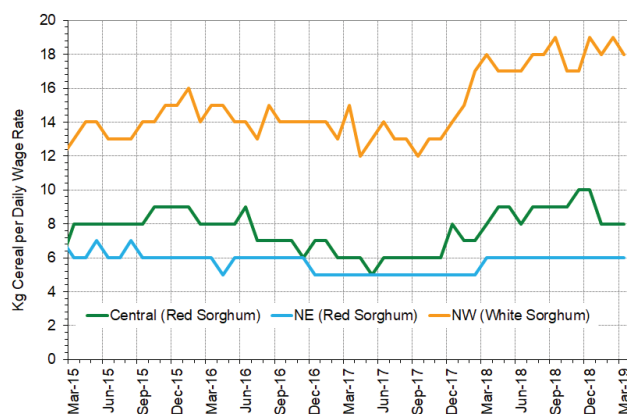


*Average body condition, Addun Pastoral, Hobyo district, Mudug region, FSNAU, March 2019*

Land preparation and dry planting of the cowpea and sorghum crops was reported in most of the agropastoral Cowpea Belt of central regions in anticipation of the start of the *Gu* rains in April. However, the *Gu* rains were delayed and have performed poorly so far, which is expected to adversely affect cowpea and sorghum production that is expected in July. The extent of damage will depend on whether the *Gu* rains continue into May or not.

In the combined markets of central Somalia, local quality goat prices exhibited mild increases (less than 11 percent) between January and March 2019 but increased moderately compared to five-year average (24 percent). This is due to reduced supply to the market on account of fewer saleable animals (reduced livestock holdings) and deteriorated body conditions. Rice prices declined mildly (2 percent) between January and March 2019 and in comparison to the five-year average (3 percent). As a result, in March 2019, the ToT between local quality goat and rice has showed a moderate increase of 20 percent (from 54 to 65 kg/head) compared to the five-year average, mainly due to high goat prices (as a result of limited supply). Similarly, ToT between local quality goat and red sorghum showed mild increase (4 percent) in the first three months of 2019 and moderate increase of 22 percent compared to the five-year average.

**Figure 7: Regional Trends in Casual Labor Wage to Cereal Terms of Trade**



Source: FSNAU and FEWS NET

In the projection period (February-June 2019), Hawd Pastoral, Coastal Deeh Pastoral and Cowpea Belt livelihoods of central regions were classified as Stressed (IPC 2), while Addun Pastoral was classified in Crisis (IPC 3). However, the impact of the worsening drought has affected poor pastoralists in central regions due to reduced access to milk, increased expenditure on food and water and ownership of few saleable animals. As a result, these livelihoods are currently experiencing food consumption gaps. Accordingly, food security outcomes of Hawd Pastoral of central region has deteriorated from Stressed (IPC 2) to Crisis (IPC 3) while Addun Pastoral sustains Crisis (IPC Phase 3). In all of the central rural livelihoods that have been classified in Crisis (IPC 3), some increase in the number of people classified in Crisis (IPC 3) is expected.

Should the *Gu* rains continue to perform poorly during the rest of the season through June, further worsening of food security outcomes would be likely in central rural livelihood zones, leading to further increases in the number of people in Crisis (IPC Phase 3).

**SOUTHERN REGIONS**

The February/March 2019 off-season harvest, collected in the regions of Middle and Lower Juba, Gedo and Middle Shabelle was 11 percent lower than previously estimated in January. This was a result of hotter and drier weather and low river levels during the seed filling and maturity stage of crop growth and development. Nevertheless, the off-season maize harvest has contributed to local cereal availability at the household level and, to a limited extent, at the market level. Towards the end of the *Jilaal* season, cereal stocks from the 2018 *Deyr* harvest have nearly been exhausted.

The cereal stocks of poor households in the marginal cropping areas in southern regions are nearly exhausted. These include peasant farmers in Rain-fed Agropastoral, Southern Agropastoral of Hiiraan and Gedo, and agropastoral areas in Middle Shabelle. Reduced water levels in Juba and Shabelle Rivers is impacting seasonal agricultural activities in Hiiraan, Juba, Gedo, Middle and Lower Shabelle regions. Water shortages and a significant increase in water prices have been reported in these regions (two to threefold increases compared to normal).



*Dried up Shabelle river bed in Jowhar district, Middle Shabelle region, FSNAU, March 2019*

Although agricultural activities have created some employment opportunities for poor households in these regions, dry weather conditions and dried-up riverine areas have reduced agricultural activities and casual labor employment opportunities. Consequently, agricultural labor wage rates in most southern regions are low, indicating low demand for farm laborers. Between January and March 2019, agricultural daily labor wage rates have declined in Bay (16 percent), Shabelle (14 percent) and Bakool (17 percent) regions. As result, the purchasing power of poor households measured through the ToT between daily labor wage rate and cereal prices has declined in Sorghum Belt (7 percent), Shabelle Valley (25 percent) and Juba regions (33 percent) between January and March 2019. This unfavorable ToT reflects substantial erosion in the purchasing power of poor households.

Pasture conditions in most of the southern pastoral and agropastoral livelihoods have deteriorated because of below-average 2018 *Deyr* seasonal rainfall, the harsh *Jilaal* dry season and the delayed and poor start of the 2019 *Gu* season. Pasture conditions are currently below average in most pastoral livelihood zones of southern Somalia. Water shortages have also been reported in parts of agropastoral and pastoral areas of Lower Shabelle, Middle Shabelle, Juba, Gedo and Hiirran regions as well in urban centers.

Livestock body conditions are currently below average to average (PET score 2-3) throughout the regions. Livestock kidding/calving rates were below average for goat/sheep and cattle in some livelihood zones, and due to poor pasture and harsh weather, the milk yield per animal declined. No outbreak of livestock disease was reported during *Jilaal*. Localized *Gu* rains that precipitated in pockets of Shabelle regions have slightly improved pasture, browse conditions and partially replenished water catchments.

The ToT between local quality goat and cereals showed a slight decrease in the Sorghum Belt (6 percent) and Juba regions (4 percent) but a moderate decrease in the Shabelle regions (21 percent) between January and March 2019, primarily driven by increasing cereal prices and contraction of livestock prices due to deteriorated body conditions.

*Gu* season agricultural activities (land preparation, dry planting and ridging for rainwater harvesting) have started in late March in most of the main crop growing areas of southern Somalia in anticipation of the normal start of *Gu* rains in April. However, farming activities in riverine areas of Shabelle and Juba were hampered due to unusually high temperatures and severe water shortages in Shabelle River. The very low river level has affected fruit trees and vegetable as well as early irrigation of maize in riverine livelihoods. The *Gu* rains were delayed and have performed poorly so far which is expected to adversely affect sorghum and maize harvest that is expected in July. Based on the damages so far, a decline of 30 to 40 percent is expected in aggregate cereal production in the main crop growing areas of southern Somalia. If *Gu* rains continue to perform poorly during the rest of the season in May and June, aggregate cereal production is likely to be lower by 50 or more compared the long-term average for 1995-2018.

In the post-*Deyr* 2018 analysis, most rural livelihoods of southern regions were classified as Stressed (IPC 2) and Minimal (IPC 1) in the food security outcome projection for February-June 2019, with the exception of Southern Agropastoral (SAP) of Hiirran and Bay/Bakool Low Potential Agro-pastoral livelihoods, which were classified as Crisis (IPC 3). These food security outcomes are not expected to change through the end of June 2019. Pastoral livelihoods in southern Somalia have relatively better livelihood assets, diverse income sources (fruit trees, cash crops, vegetables) and have received a relatively higher level of rainfall compared to northern and central regions. Given relatively better 2018 *Deyr* season rainfall, the impact of the *Jilaal* was mild compared to northern and central regions. If the *Gu* rains continue to perform poorly during the rest of the season through June, however, then a worsening of food security outcomes would be likely in most southern rural livelihoods. Further increases in the number of people in Crisis (IPC Phase 3) would be a strong possibility.

### **Most Likely Scenario, July-September**

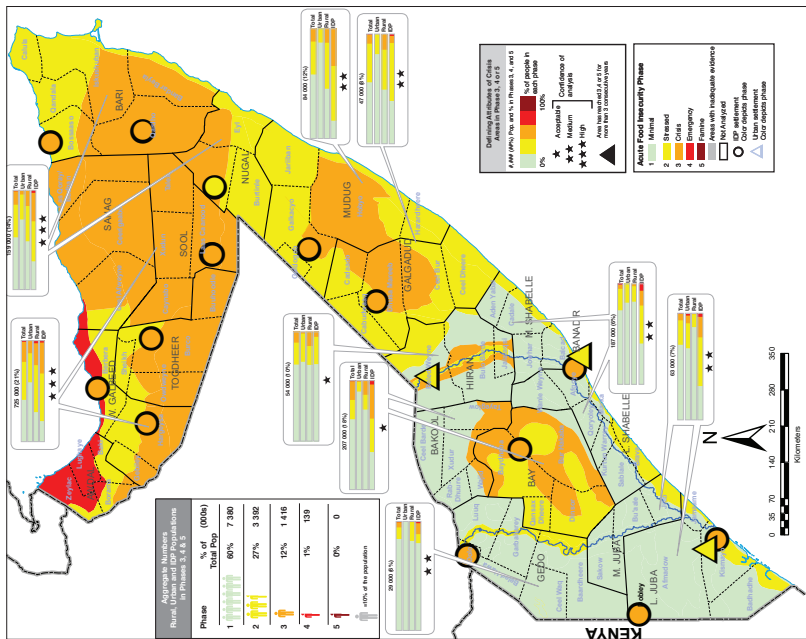
The extended impact of the poor performance of *Gu* season rainfall on food security outcomes is likely to be experienced between July and September 2019. In the most likely scenario, East Golis Pastoral of Sanaag, Northern Inland Pastoral, Addun Pastoral, Hawd Pastoral of northeast and central regions and Southern Agropastoral livelihood of Hirran region will deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) as food consumption gaps grow due to significant reductions in food and income sources coupled with progressive erosion of people's coping capacities. Similarly, East Golis Pastoral of Bari, Coastal Deeh Pastoral and Fishing, Sorghum High-Potential Agropastoral of Bay, Southern Rainfed Agropastoral livelihood zones will deteriorate from Stressed (IPC Phase 2) to Crisis (IPC Phase 3) with most of the rest of the country classified as Stressed (IPC Phase 2). Accordingly, the overall number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) is expected to increase to approximately 2.2 million through September 2019, with an additional 3.2 million people classified as Stressed (IPC Phase 2).

### **Worst-case Scenario, July-September**

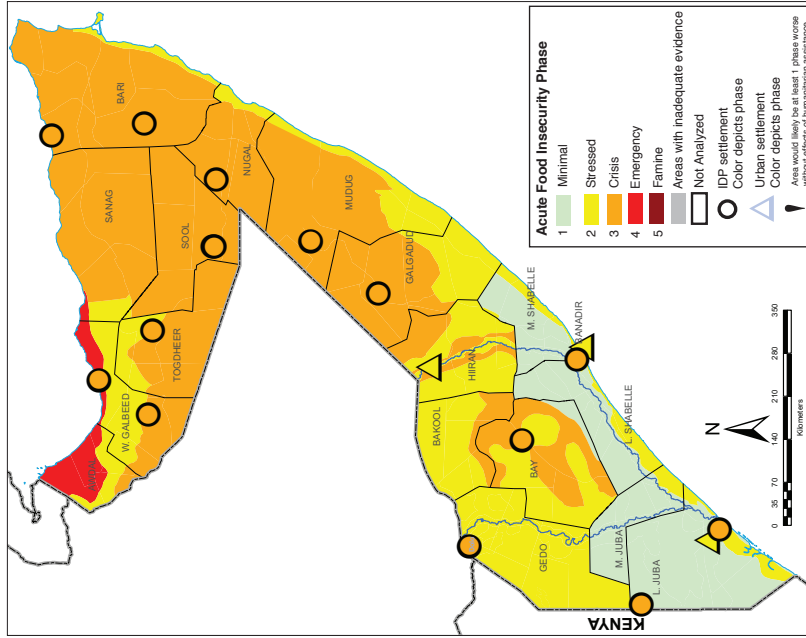
In the worst case scenario where the *Gu* rains continue to perform poorly through the remainder of the season in May and June, further worsening of food security and nutrition outcomes would be likely due to widespread crop failure resulting in deficits of more than 50 percent, a significant increase in livestock losses and significant population displacement. As a result, food security outcomes would likely deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4) in Sorghum High-Potential Agropastoral of Bay and Bakool and from Stressed (IPC Phase 2) to Crisis (IPC Phase 3) in Southern Agropastoral, Riverine Pump-Irrigation and Riverine Gravity Irrigation livelihood zones, leading to further increases in the number of people in Crisis (IPC Phase 3) and Emergency (IPC Phase 4). Food security and nutrition outcomes among displaced populations are also expected to worsen across the country, with main IDP settlements in Baidoa, Dollow and Mogadishu likely to deteriorate from Crisis (IPC Phase 3) to Emergency (IPC Phase 4).

RECENT TRENDS IN FOOD SECURITY OUTCOMES

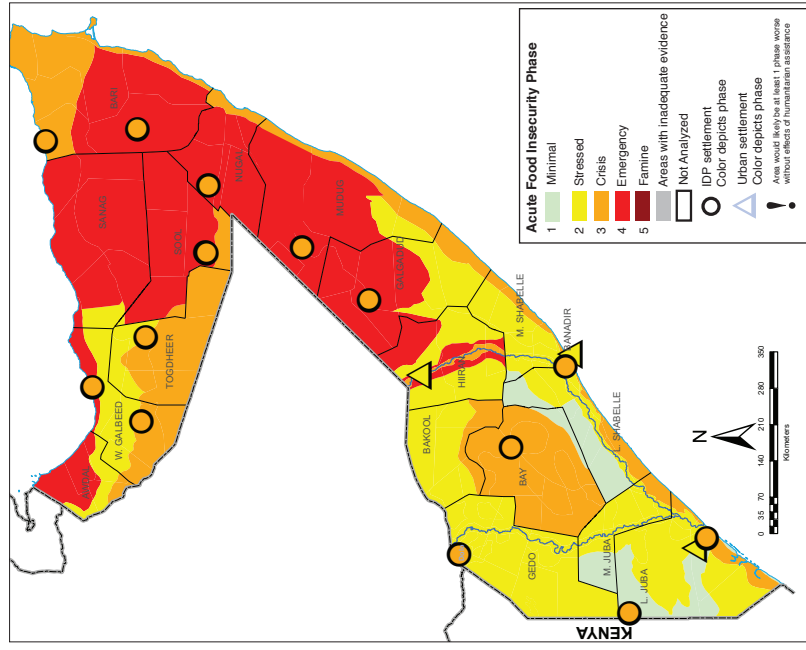
Food Security Situation Most Likely Situation: February-June 2019



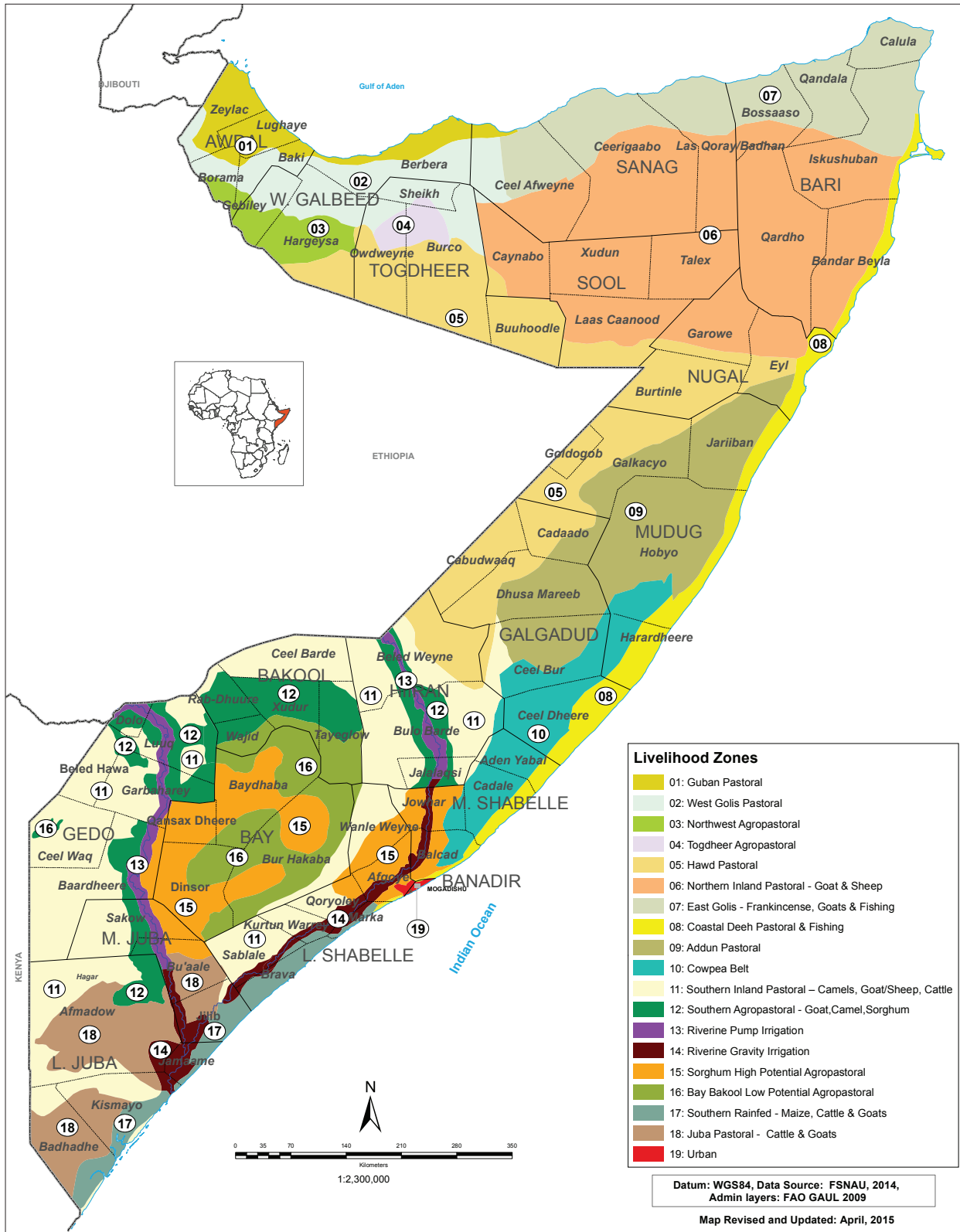
Projected Food Security Outcomes, April-June 2019



Projected food security outcomes, July-September 2019



### SOMALIA LIVELIHOOD ZONES MAP



#### Recent publications and releases

- *FSNAU-FEWS NET Technical Release January 2019*
- *FSNAU-FEWS NET Somalia Food Security Outlook February 2019*
- *Early Warning - Early Action Dashboard and Map, March 2019*
- *Timeseries Rainfall and Vegetation Cover Maps, March 2019*
- *Climate Update, March 2019*
- *Market Update, March 2019*

*NOTE: The above publications and releases are available on the FSNAU website: [www.fsnau.org](http://www.fsnau.org)*

