FSNAU
Food Security and Nutrition Analysis Unit - Somalia

Food Security & Nutrition

FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

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Quarterly Brief - Focus on 2018 Post-*Deyr* Season Early Warning

KEY ISSUES

According to the consensus forecast from Greater Horn of Africa Climate outlook Forum (GHACOF50) issued at the end of August 2018, there was a greater likelihood of normal to above normal 2018 *Deyr* (October – December) rains across Somalia. Above-average *Deyr* rains were also expected to cause flooding in flood-prone low-lying and riverine livelihoods of the country. However, actual *Deyr* season rainfall between October and early December 2018 turned out to be below average in most parts of the country.

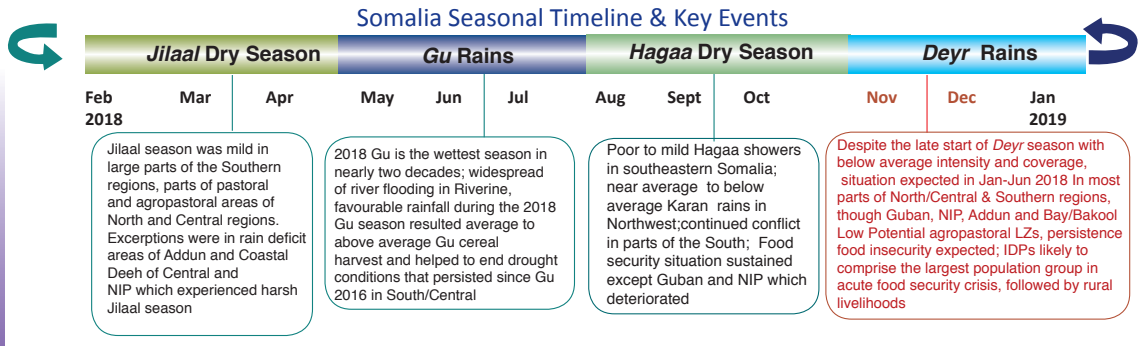
Livestock holdings among poor pastoral households in northeastern and central Somalia remain below baseline. Livestock body conditions, reproduction and milk production and availability are below average to poor in areas that received below average *Deyr* rains. With few saleable animals, poor pastoralists will not be able to meet their food needs, payback accumulated debt and cover increased expenditure on water during the forthcoming dry Jilaal (January – March 2019) season.

In Northwest Agropastoral livelihood zone, the 2018 Gu/Karan cereal harvest was estimated at 11 000 tonnes. This is 43 percent lower than the amount projected in July 2018 and 76 percent lower compared to the Gu/Karan average cereal production for 2011 – 2017. Main reasons for poor production are below average and poorly distributed Gu/Karan rains, dry spells, pest infestation and bird attacks.

Due to below average rainfall amounts and its poor temporal and spatial distribution during the current *Deyr* season, the overall cereal harvest in southern Somalia is expected to be 30-40 percent below the long-term average. In low potential agropastoral areas, production will be significantly below average to failed.

Prices of local and imported food commodities remain stable and there have been slight to moderate reductions in the cost of the Minimum Expenditure Basket (MEB). There have also been some improvements in the labor-to-cereal terms of trade which measures purchasing power among poor households. However, as market supplies from the forecast below-average 2019 *Deyr* harvest are expected to be short-lived, local food prices will likely start to increase in February 2019, which will likely adversely impact food security outcomes.

Current food security outcomes are broadly consistent with the food security outlook for August to December 2018 that was released in late August 2018, with most rural and urban livelihood zones of the country classified as Stressed (IPC Phase 2) or Minimal (IPC Phase 1). The major exceptions are Guban Pastoral, which is classified as Emergency (IPC phase 4), and Northern Inland Pastoral (NIP) of Northwest, which is classified as Crisis (IPC Phase 3). In addition, most of the main IDP settlements are classified as Crisis (IPC Phase 3), according to results of the integrated food security and nutrition assessments conducted by FSNAU in November 2018. However, food security conditions are expected to deteriorate to Crisis (IPC Phase 3) between January and May 2019 in Togdheer Agropastoral and NIP of Northeast livelihood zones in northern Somalia, Addun Pastoral and Coastal Deeh Pastoral and Fishing livelihood zones in central Somalia, and Bay-Bakool Low Potential Agropastoral livelihood zone in southern Somalia. The proportion of households facing food consumption gaps and therefore Crisis (IPC Phase 3) outcomes is also likely to increase in other agropastoral livelihood zones in Gedo, Hiraan, Bay and Bakool, as well as coastal areas of the Shabelle regions and riverine livelihood zones of Jamame district in Lower Juba. Food security outcomes in these areas, however, are expected to be Stressed (IPC Phase 2).



- Climate
- Civil Insecurity
- Livestock
- Agriculture
- Markets
- Nutrition
- Integrated Analysis

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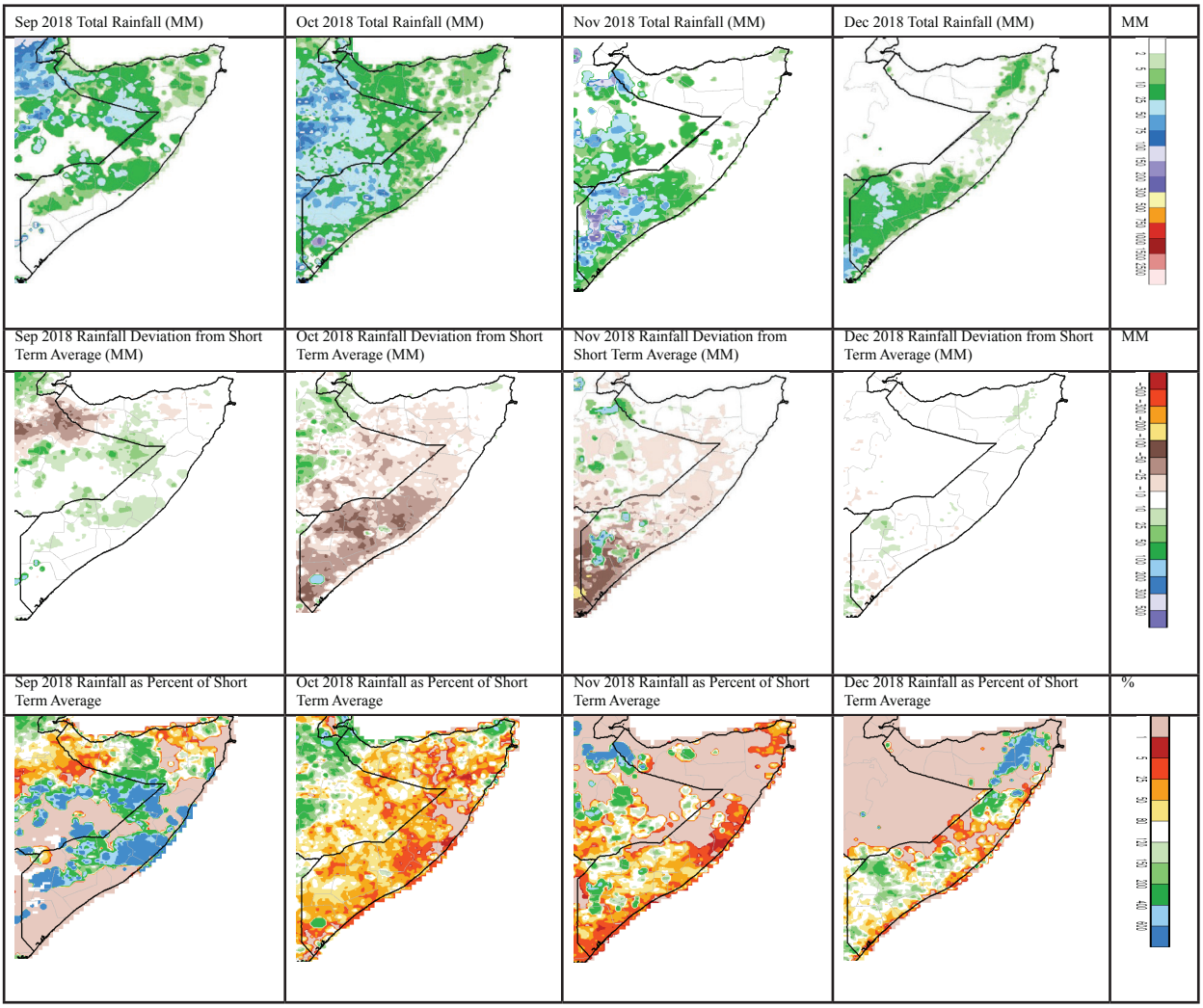
SECTOR HIGHLIGHTS

CLIMATE

Map 1: Rainfall Performance between 1st September and 12th December 2018



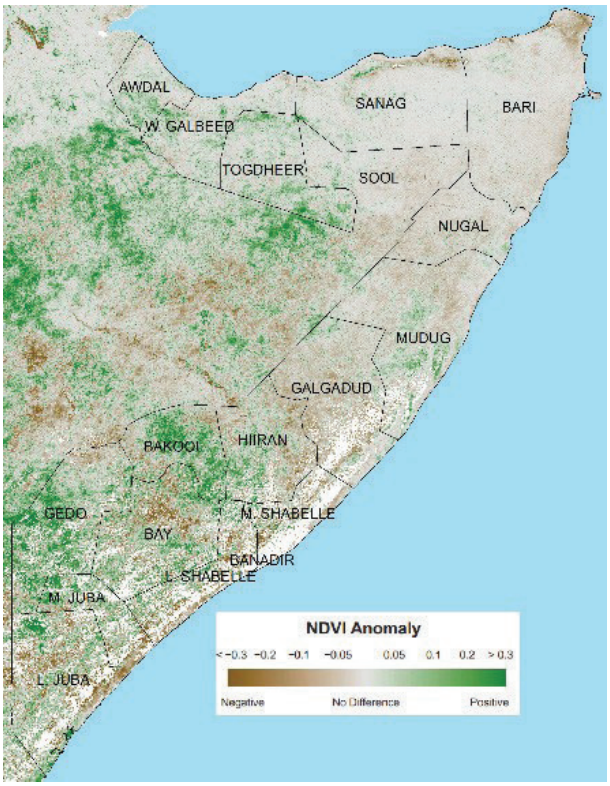
The 2018 *Deyr* (October-December) rains were delayed in many parts of Somalia. Rainfall in October and November was generally below average in terms of intensity and temporal and spatial distribution. Precipitation in October, which is normally the peak of *Deyr* season rainfall, was limited during the first two dekads of the month, except few localized areas in the South and Northwest. However, rains of moderate intensity and distribution were observed in most southern regions in late October. Likewise, localized light to moderate rains were reported in parts of central and northwestern Somalia although these were not visible on satellite images.

In November, little to no rainfall was recorded across the country in the first 10 days of the month. However, intensified moderate rains fell during the second ten-day period of November in large parts of the South, pockets of Hawd and Addun Pastoral livelihood zones in central Somalia, and West Golis livelihood zone of Borama (Awdal) and Hawd Pastoral livelihood zone of Hargeisa (Woqooyi Galbeed). Little to no rainfall was reported in most livelihood zones of the Northeast and large parts of central and northwestern Somalia. Cumulatively, most of the southern areas of the country received 50-250mm of rainfall during October and November, while most parts of central Somalia received 25-150mm. However, most of the northern regions of the country received less than 25 mm of rainfall, except parts of Togdheer, Sool, Sanaag and Nugaal regions, which received 25-100 mm of rainfall. Compared to average, the whole country, with the exception of localized areas in the South, experienced a deficit of 25 to 100mm of rainfall (Map 1). However, renewed moderate to heavy rains in some parts of the Northeast, northern parts of central Somalia, and parts of the South (Gedo, the Jubas and the Shabelles) received some rainfall in early December, and this is expected to rejuvenate rangeland resources.

In the North, rains started early or on time in some areas but were late in most regions. Rains were erratic and poorly distributed in most livelihood zones. In October, rains of moderate intensity and distribution fell in most livelihood zones of Awdal, Woqooyi Galbeed and Togdheer and some parts of Bari, Nugaal, Sool and Sanaag, including East Golis, parts of NIP, and Hawd Pastoral livelihood zones. However, other areas in the northern Somalia, including most of NIP, Addun Pastoral, and Coastal *Deeh* Pastoral and Fishing livelihood zones in the Northeast, received little to no rainfall. In November, rains were suppressed, and most livelihood zones experienced dry conditions. Only pockets of West Golis of Borama district, Hawd Pastoral of Hargeisa district, East and West Golis of Sanaag region, parts of Coastal Deeh Pastoral and Fishing and NIP of Bari region, and Hawd of Galkayo district received localized light to moderate rains. Overall, *Deyr* rainfall in northern Somalia was poor to below average in terms of frequency, amount and distribution, although livelihood zones in Awdal, Woqooyi Galbeed and western parts of Togdheer, Sool and Sanaag received relatively better rains than other areas.

In central Somalia, rains were generally below average in terms of amount and distribution. During October, only localized areas of Addun and Hawd Pastoral livelihood zone of Dhusamareb and Abudwaq and parts of Hobyo and Cowpea Belt livelihood zone of Harardhere district received moderate rainfall. Little to no precipitation was reported in the rest of Galgaduud and southern Mudug. Following a dry spell in the first ten days of November, moderate to heavy rains were reported in Coastal Deeh Pastoral and Fishing and Cowpea Belt livelihood zones in Elder, Elbur, Hobyo and Harardhere districts of Mudug and Galgadud regions.

Map 2: NDVI/Vegetation Cover Anomaly December 1-10, 2018



In the South, 2018 *Deyr* season rainfall was delayed, with rainfall starting in late October in most of regions. In addition, rainfall performance was generally poor in terms of intensity, distribution, frequency and coverage in most livelihood zones. Little to no rainfall was recorded in the first ten days of November. However, rainfall of average to below-average volumes (10-50mm) and coverage occurred in most regions during the second dekad of the month (November 10- 20), including Bay, Bakool, Shabelle, Juba, Gedo and Hiraan. Overall, most southern regions experienced rainfall deficits of 25 to 100 mm compared to the October-November short-term average. This has adversely affected crop growth and development in agropastoral livelihood zones.

In October and November, rainfall in the upper river catchments of the Shabelle and Juba rivers in the Ethiopian highlands led to rising river water levels along the Shabelle and Juba rivers, but river water levels remained below moderate flood-risk levels throughout the season. No riverine flooding was reported, contrary to earlier expectations. Below-average rainfall and low river levels are also expected to adversely impact off-season crop production in riverine livelihood zones. However, early-planted, pump-irrigated main season riverine production will likely be average.

According to the Normalized Difference Vegetation Index (NDVI)/vegetation cover anomaly map for the first dekad (1-10) of December, vegetation conditions have somewhat improved towards the end of the *Deyr* season in some areas, especially in parts of the Northwest, Galmudug and Hiran regions, and many parts of southern Somalia (Map 2). However, major portions northeastern and central regions and parts of southern Somalia experienced adeterioration in vegetation conditions. The rainfall forecast from the National Oceanic and Atmospheric Administration's Climate Prediction Center (NOAA/CPC), which is valid up to 28th December 2018, suggests that most parts of the country will receive little to no rainfall

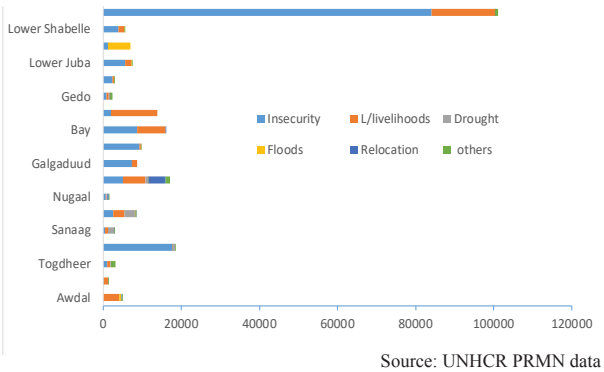
CIVIL INSECURITY

Between July and November 2018, armed conflict escalated in several parts of Somalia. Resource- and clan-based conflicts were reported in Lasaanod of Sool region and Balanbale and Guriel of Galgadud region. Other clan-related tensions also exist in Sanaag and Bari regions, emanating from clan rivalry or from unsettled clan disputes. In southern Somalia, military skirmishes between insurgents and the government of Somalia and allied African Union Mission in Somalia (AMISOM) have continued in most southern regions. On top of this, localized clan and resource-based clashes were reported in Lower Shabelle region.

The various conflicts resulted in loss of lives and properties, disruptions of livelihoods activities and market access, suspension or scaling down of humanitarian assistance, disruption of agricultural activities (Jamame district of Lower Juba), constraints to livestock migration options (Bari and Galgaduud regions) and population displacement. PRMN data from UNHCR indicates that, between July and October 2018, about 231,964 persons were displaced for various reasons: insecurity (66%), loss of livelihoods (24%), drought (3%) and floods (3%) [Figure 1].

One of the torched houses in Dhumay Village Hawd of Las Anod during the ongoing inter clan clashes FSNAU, Oct 22, 2018

Figure 1: Reasons for Displacement by regions (July-Oct 2018)



Source: UNHCR PRMN data

AGRICULTURE

Based on FSNAU's 2018 *Deyr* preliminary assessments conducted in November, the area planted for cereals (maize and sorghum) is below average in all crop growing areas regions of southern Somalia. The main driving factors included erratic rains, pest attacks and high temperatures leading to moisture stress on planted crops. Rainfall received in early December is not expected to have a significant positive impact on crop growth and development given rainfall deficits in October and November. Accordingly, overall cereal production prospects in most southern regions are likely to be below average. However, early-planted maize crops in the riverine areas are performing well and harvest are expected to be average, due to irrigation opportunities and favorable rains received in the first half of November. Harvesting of most of the established crops is expected beginning late January to February 2019. Based on the above constraints, approximately 70 percent of the total area planted with cereal is expected to be harvested from all southern Somalia. Consequently, overall *Deyr* 2018/19 cereal production will likely be 60-70 percent of the post-Deyr average for 2013-2017.

2018 *Deyr* area planted in Lower Shabelle, which is a major maize basket of Somalia, is below average. This is attributable to below normal *Deyr* 2018 rains and stiff competition for water for irrigation, leading to a significant decline in cropped area compared to the previous 2017/18 *Deyr* season. Specifically, area planted was reduced in the maize producing areas of Kurtuwarey, Sablale, and part of Qoryooley districts. However, riverine livelihood zones in Afgoye, Marka and Qoryooley districts are expected to have near-average maize harvests. Similarly, near-average harvest of sorghum is expected in Sorghum High Potential Agropastoral livelihood zone of Wanla-weyn district, which is among the few areas that received average *Deyr* 2018 rains in the Shabelle valley. Overall, cereal production in Lower Shabelle region is expected to decline by 20-25 percent compared to the post-war average.

In Bay region, which is a major sorghum producing area, most crop planting started in late October due to the late start of the *Deyr* rains and the crops are currently still in vegetative stages. Baydhabo and Burhakabo districts are major rain deficit areas and experienced significant pest attacks, and below-average cereal production is expected. Dinsor and Qansaxdhere districts received average rains in late September and crops are in good condition. However overall cereal production in Bay region is likely to be 15 -25 percent below the post war average.

Crop production prospects are poor in agropastoral livelihood zones of Hiran, Gedo, Bakool, Middle Juba, and Middle Shabelle regions due to poor and erratic *Deyr* rains compounded by high temperatures. Most of agropastoral areas have experienced widespread germination failure or severe moisture stress at early vegetative stages of crop growth. Riverine livelihood zones in Hiran, Middle Juba, Lower Juba, Middle Shabelle and Gedo regions were also affected by poor weather. Generally, rains have been erratic and below average, with intervals of long dry spells that coincided with critical stage of crop growth and development.

Good Sorghum Crop Conditions in Agropastoral Areas, Middle Shabelle-Jowar, FSNAU, November 3, 2018

Although early-planted maize harvest in riverine areas is likely to be average, off-season crop harvests in riverine areas of Juba, Shabelle and Gedo regions, expected in February/March 2019, are likely to be below average. Harvest prospects for other crops such as sesame, cowpea and vegetables are also poor because of below-average to poor *Deyr* season rainfall. For the same reason, the cowpea harvest in the Cowpea Belt livelihood zone in central Somalia is likely to be poor.

Based on assessments jointly conducted by FSNAU and the Somaliland Ministry of Agriculture Development in November, the 2018 Gu- Karan cereal harvest in Northwest Agropastoral livelihood zone in Hargeisa, Gebiley, Baki and Borama districts was estimated at 11 000 tonnes. This is 43 percent lower than the amount projected in July 2018 and 76 percent lower than the Gu/Karan average cereal production for 2011-2017. The poor cereal harvest mainly reflects below-average and poorly distributed Gu/Karan rains, dry spells, heavy insect infestation (stalk borer) and bird attacks.

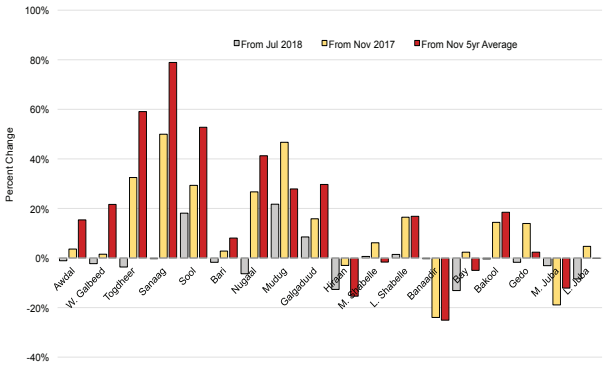
In southern regions, most poor households are currently dependent on market purchase to access food. In addition, the expected poor harvest will not be enough to fully replenish cereal stocks at the household level. In the major cereal producing regions of Lower Shabelle and Bay, cereal stocks among poor households will likely be exhausted earlier than normal. The harvest shortfall will trigger an early start of the lean season and raise cereal prices starting in February 2019. At the time of the assessment in early November, local cereals were still available in most markets due to off-season harvests collected in September/October in riverine areas and the release of carryover stocks by most middle and better-off wealth groups into the market. As a result, between July and November 2018 maize prices have declined in the riverine markets of Middle and Lower Shabelle (23%) and Middle and Lower Juba (7%). Similarly, sorghum prices decreased in Bay (4%), Bakool (13%) and Gedo (16%) but increased in Hiraan (10%) over the same period. In northwest Somalia, white sorghum prices remained stable due to the incoming 2018 Gu/Karan harvest, but prices will likely begin to increase in January as the new harvest becomes depleted.

Across the rest of Somalia, both maize and sorghum prices were lower in November 2018 compared to the same period last year. This is attributable to a combination of factors such as availability of cereals stocks from the 2018 Gu harvest and sustained humanitarian assistance.

LIVESTOCK

In most northern and central regions, both the Karan (July-September 2018) and *Deyr* 2018 (September-November 2018) rains were below-average, but rangeland conditions have been mixed. In most livelihood zones, pasture and water are below-average to poor, including large parts of Bari, Nugal, Sanaag, Sool and north Mudug regions and most pastoral and agropastoral areas in central regions. On the other hand, atypical rainfall in the Northwest in late September and October 2018 improved rangeland conditiona in Northwest Agropastoral, Guban Pastoral, Hawd Pastoral, West Golis Pastoral, and pockets of NIP and Addun Pastoral livelihood zones.

Figure 2: Regional Trends in Local Quality Goat Prices (SoSh/SlSh)



In the South, pasture, browse and water conditions are average to above average in many areas due to the lasting impact of the average to above-average Gu (April-June) 2018 rains, which mitigated the effect of near-average to below-average *Deyr* (September- November) rains. In parts of southern agropastoral of Gedo, Hiiran and Bakool regions, along the coast of Middle and Lower Juba and Middle and Lower Shabelle regions, conditions are below-average given below-average *Deyr* rainfall that depleted pasture and water resources earlier than usual. Currently, livestock migration is mostly normal across the country, but abnormal migration (moving from rain deficit areas to distant grazing areas that received better rainfall) was reported within parts of northern and central Somalia.

Unusual Conception Control Over Goat due to Drought Mitigation, NIP, Bari Region, FSNAU, November, 2018

Livestock body conditions for all species remain normal to above normal (score 3-4) in most of the northwest and southern regions of the country because of near average to above average rangeland conditions and availability of dry pasture in rain deficit areas. However, field reports indicate below average to poor body conditions (PET 3-2) in NIP of Sanaag, Bari and Nugaal, and Addun Pastoral and Coastal Deeh Pastoral and Fishing of central and northeastern regions, particularly among lactating animals. Medium cattle calving (August-September), goat and sheep kidding/lambing (October-November) are reported across the country. The low start of camel calving which started in November 2018 is expected to reach medium levels in December. As a result, milk availability and production has improved but remained below-average in most parts of central and northern Somalia. However, in most of the South, milk production is average and expected to increase, as most camel births will take place in December. According to the preliminary *Deyr* 2018 assessment, livestock holdings and herd sizes among poor households have generally increased across all species (camel, cattle and sheep/goat). However, most households are still recovering from the 2016/2017 drought and livestock holdings remain below baseline levels in northern and central regions. In most of the South, cattle holdings are also still below baseline levels, except in the Juba and Shabelle regions, where it is at baseline levels. In rain deficit areas in northern and central Somalia, herd growth will likely decline due to the anticipated prolonged Jilaal dry season, and households are likely to increase sales of breeding livestock to purchase expensive trucked water and high priced imported food.

In general, livestock prices have been stable or have increased due to several factors, including improved livestock body conditions, reduced supply because of low asset holdings, and increased demand for livestock for local consumption. Compared to July 2018, the price of a local quality goat in November 2018 changed by less than or equal to +/- 5% (Figure 2). In comparison to the annual and five-year average, goat prices increased moderately across most region. Compared to the five-year average, local goat prices increased most significantly in central regions, by 29%, and in the Northwest and Northeast, by 26%. However, goat prices declined slightly by 4% in the Juba region compared to average.

Cattle price performance has been mixed. Prices are lower than July 2018, lower than last year (November 2017) and lower than average in southern regions but remained mostly higher in the north.

MARKETS AND TRADE

Exchange Rate Trends

Between July and November 2018, both the Somali Shilling (SOS) and the Somaliland Shilling (SlS) were generally stable against the United States dollar (USD) in most reference markets. However, over the past year, the Somali Shilling depreciated significantly (20%) in the northeast/Puntland due to the cumulative effect of the increased supply of new currency introduced in the region since late 2016. The Somali Shilling also depreciated modestly (4-8%) in southern markets due to increased dollarization of economy and reduced demand for the Somali Shilling. November 2018 average retail exchange rates in some markets are as follows: SoS 24,300 per USD in Bakara market (Mogadishu) and SoS 34,125 per USD in northeast markets (Bosasso and Garowe). Meanwhile, the Somaliland Shilling was stable over the past year, after significant depreciation in 2017. In comparison to the 2013-2017 average, both the Somaliland Shilling and Somali Shilling have depreciated significantly (27-47%) in the northern markets, primarily driven by increased circulation of newly printed local currency notes in northern regions.

Cereal Imports and Commodity Price Trends

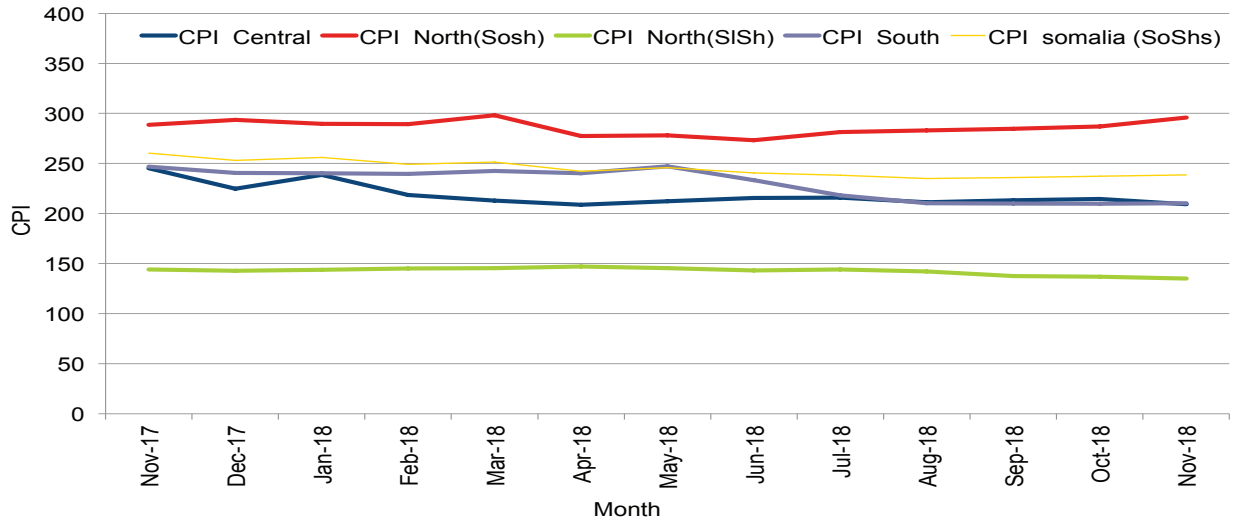
The prices of imported commodities (rice, wheat flour, sugar and vegetable oil) in in Somali Shilling (SOS) markets were either stable or slightly increased by less than 10% in most central and southern markets between July and November 2018 and compared to the annual average, due to a steady supply from the international markets and stable fuel prices. In the northeast, the prices of imported sugar, wheat flour, and rice in November were slightly above November 2017 prices and the 2013-2017 average, due to depreciation of the Somali Shilling in this region. Similarly, in Somaliland Shilling (SLS) markets, depreciation resulted in a larger increase of 20 to 30 percent in imported staple foods prices compared to the 2013-2017 average.

Approximately 3 493 MT of sorghum and maize were imported from July to November 2018 from Ethiopia to central and northern Somalia, representing an increase of 11 percent compared to cumulative imports over the same period in the previous year (July-November 2017). The increase was due to reduced tension along the central and northern border between Ethiopia and Somalia, leading to improved cross border trade and commodity movement.

Consumer Price Index (CPI)

Between July and December 2017, the Consumer Price Index (CPI) for poor urban households, measured through the changes in the cost of items in the Minimum Expenditure Basket (MEB), exhibited slight to moderate decreases in the Northwest (2-10%) and most central and southern markets across the country (2-13%), due to increased supply of sorghum, a key commodity in the MEB. However, the CPI increased 5 to 6 percent since July 2018 in northeastern markets and adjacent northwestern markets. Compared to one year ago, the CPI declined in most reference markets of the country although there have been slight increases in some northeastern markets (1-7%). Comparison of the November 2018 CPI with the 2013-2017 average paints a mixed picture with increases in CPI in most northern regions and declines in central and southern regions. The increase in CPI in northern regions is likely related to the cumulative impact of the inflationary pressure caused by the printing of local currency notes introduced in 2016/2017 (Figure 3).

Figure 3: Monthly Trends in Consumer Price Index (CPI)



NUTRITION

Levels of acute malnutrition are persistently high across most parts of Somalia. Based on the results of FSNAU nutrition assessments conducted in June and July 2018, the IPC acute malnutrition outcomes analysis projection for September to November indicated a Global Acute Malnutrition (GAM) prevalence of Serious (GAM of 10 to 14.9%) was likely among most rural and IDP population groups, while a Critical GAM prevalence (GAM ≥15%) was expected in some areas: Guban Pastoral, northeastern Northern Inland Pastoral (NIP), Hawd Pastoral of northeast and central, Gedo and Juba riverine areas, and IDPs in the Northeast, Galkacyo, Mogadishu, Baidoa and Doolow.

Results from the 2018 *Deyr* nutrition assessment conducted across Somalia in November 2018 among 15 displaced and urban population groups showed a Critical prevalence of Global Acute Malnutrition (GAM ≥ 15%) in 2 out of 15 population groups surveyed: Qardho IDPs and Mogadishu IDPs. Overall, the 2018 *Deyr* nutrition situation among IDPs in Somalia indicates sustained Serious (GAM 10-14.9%) levels of malnutrition since the 2017 *Deyr* (i.e. 13.9% during the 2017 Deyr, 14.4% in the 2018 Gu and 11.9% in the 2018 Deyr), but with a modest improvement in median nutrition levels among IDPs. However, these improvements are not statistically significant.

On the other hand, there are statistically significant improvements in the nutrition situation among some IDP populations during 2018 *Deyr* season compared to 2017 *Deyr* (November 2017) in Galkacyo, Dhusamareeb and Kismayo. Statistically significant decreases in GAM and SAM prevalence have also been observed among IDPs in Bossaso, Dhusamareb, Baidoa, Dolow and Kismayo when comparing results between the 2018 Gu (June) and 2018 *Deyr* (November). This is attributed to increased humanitarian assistance that was scaled up from August 2017, declining acute watery diarrhoea (AWD) outbreaks and improvement of food the security situation. Between the 2018 *Deyr* and 2017 Deyr, decreases in GAM and Severe Acute Malnutrition (SAM) prevalence were also observed among IDPs in Berbera and Burao in the northwest; Bossaso and Garowe IDPs In the northeast; and Baidoa and Dolow IDPs in southern and central Somalia. However, these were not statistically significant.

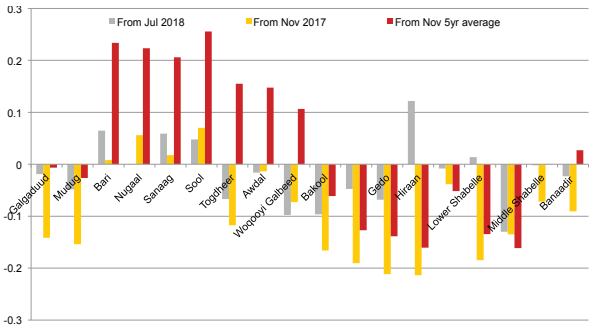
INTEGRATED FOOD SECURITY ANALYSIS

URBAN

Poor urban populations in Somalia are highly dependent on food purchases from the market, making them vulnerable to significant increases in their Minimum Expenditure Basket (MEB). As poor urban households also rely on income from wage labor, their purchasing power and food security status are usually affected by the relative changes between labor wages and the price of cereal staples and access to humanitarian assistance.

The cost of MEB in November 2018 indicated declines compared to both July 2018 and November 2017 in most Figure 4: Percentage change in Monthly Expenditure Basket regions due to lower cereal prices that resulted from the 2018 Gu season bumper harvest. The MEB exhibited slight to moderate decreases in the northwest (2-10%) and most central and southern markets across the country (2-13%) due to increased supply of sorghum, a key commodity in the MEB. However, the MEB increased 5 to 6 percent since July 2018 in northeastern markets and adjacent northwest markets and 12 percent in Hiran region. MEB cost is higher in November 2018 compared to the 5-year average in northern region but still lower in southern regions.

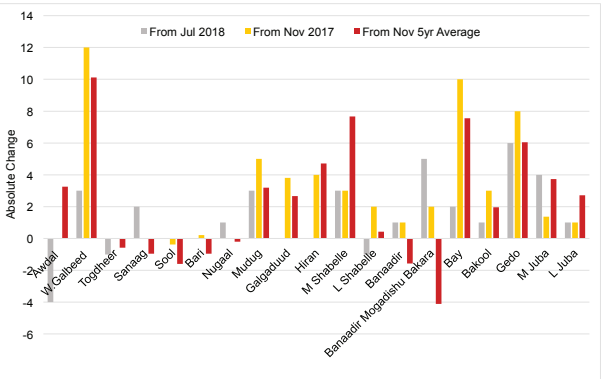
Figure 4: Percentage change in Monthly Expenditure Basket



Casual labour constitutes the main source of income for poor urban households. In November 2018, casual labor wage rates in urban areas exhibited mild to moderate increases in most regions of the country in all the comparison periods. The increases are attributed to increased seasonal agricultural activities (planting, weeding etc.) in neighboring rural areas. However, labor wage rates declined moderately compared to July 2018 (13-28%) and five-year average (26%) in the Shabelle Valley due to a reduction in agricultural employment opportunities on account of the below-average 2018 *Deyr* rains.

In November 2018, the purchasing power among poor households, as measured by the terms of trade (TOT) between the casual labour wage and cereal prices, remained relatively stable with regard to all comparison periods in northern and central regions. It was moderately higher in most southern regions due to increased labour wage rates and/or decreased cereal prices (Figures 4 and 5).

Figure 5: Absolute change in Terms of Trade Labour to Cereal



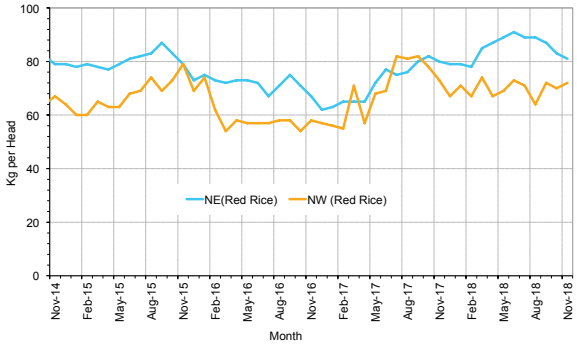
The food security outlook for August to December 2018 based on the 2018 Post-Gu IPC acute analysis indicated that food security outcomes for most of the urban population across Somalia would be either Stressed (IPC Phases 2) or Minimal (IPC Phase 1). Exceptions are Bossaso (Bari Region) and Beletweyne (Hiran Region) districts, which have been classified as Crisis (IPC Phase 3). Prices of local and imported food commodities are stable, slight to moderate reductions in MEB, and some improvements in the labor to cereal TOT. However, as market supplies from the forecast below average 2019 *Deyr* harvest are expected to be short-lived, local food prices will likely start to increase in February 2019, with likely adverse impact on food security outcomes. Therefore, the above urban food security outcome classifications will remain through May 2019 as no improvements are expected in the contributing factors.

RURAL

Northern regions

As a result of below-average 2018 Karan (July-September) rains which were followed by below-average 2018 *Deyr* (October-November) rains, pasture/browse and water condition showed mixed patterns in the northern regions. Specifically, pasture, browse and water availability are average in large parts of Guban, Hawd and West Golis pastoral and Northwest agropastoral. Pasture, browse and water are below average to poor in most parts of Togdheer Agropastoral, large parts of the Northern Inland Pastoral (NIP), Addun Pastoral, East Golis and Coastal Deeh Pastoral (Sool, Sanaag, Bari and Nugaal regions) due to below average to poor performance of the *Deyr* rains. Livestock migration from rain deficit areas to areas that received better rainfall has been reported in parts of northern pastoral areas. Abnormal camel migration from NIP of Bari region to Sanaag region (El-afweyn) was also reported. In areas where large numbers of livestock migrated to, grazing resources are being consumed at a faster rate than usual and early depletion of pasture and water is likely in the course of forthcoming Jilaal (January to March 2019) dry season. Water shortages have already been reported in large parts of berkad-dependent livelihoods of NIP, East Golis Pastoral of Bari region and Addun Pastoral of central regions. Body condition of livestock is mostly average (PET: Score 3), owing to sufficient dry pasture availability and better migration option in most livelihoods of northern regions. However, livestock body conditions in parts of NIP, Addun, Coastal Deeh and East Golis are average to below average (PET: Score 3-2), with likely further deterioration in the course of forthcoming Jilaal dry season (Figure 6).

Figure 6: Regional Trend in Terms of Trade: Goat to Cereal (North)



In northern pastoral areas, livestock off-take was within the normal range between July and November due to availability of adequate pasture, migration options and continued access to humanitarian assistance. Medium to low goat kidding took place in October in most livelihood zones, temporarily improving milk availability for household consumption. However, this was short-lived and milk availability declined as the *Deyr* rains subsided. In Guban Pastoral livelihood zone, which was severely affected by Cyclone Sagar in May 2018, goat kidding and milk availability was low to none due to substantial livestock losses and prolonged dry conditions.

Camel calving has started in late November and is expected to reach medium levels through December. This has improved availability of camel milk for household consumption and sale, including through gifts to poor households. However, milk availability will likely decline during the dry Jilaal season as pasture conditions deteriorate further in most livelihoods.

Livestock holdings among poor households in all livelihoods of the north mostly remain below baseline and is likely to decline in the forthcoming Jilaal dry season as households sell more livestock to finance food purchase and water expenses. Pastoral households still have significant accumulated debt burden and reductions in the levels of humanitarian assistance in recent months is likely to lead to further indebtedness. Due to the low number of saleable animals they currently own, the overall food security and livelihood situation of poor pastoral households in northern pastoral livelihood zones is likely to deteriorate at least up to May 2019. Guban Pastoral, Northern Inland Pastoral, Addun Pastoral, Coastal Deeh Pastoral and Fishing, and Togdher Agropastoral livelihood zoness are likely to be most affected.

Average Pasture/Body Condition, Hawd, Togdher Region, Odweyne, FSNAU, November 2018

The ToT between goat and rice showed mixed trends between July and November 2018, but were mostly stable or slightly increased or declined by less than 10%. Annual comparisons indicate stability of ToT in both the Northwest and Northeast. Similarly, compared to the November 5-year average (2013-2017), the ToT in the Northeast and Northwest showed a mild increase of 5-6%. This has slightly improved household purchasing power.

Based on assessments jointly conducted by FSNAU and the Somaliland Ministry of Agriculture Development in November in Northwest Agropastoral livelihood zone in Hargeisa, Gebiley, Baki and Borama districts, the 2018 Gu-Karan cereal harvest was estimated at 11 000 tonnes. This is 43 percent 76 percent lower than the the Gu/Karan average cereal production for 2011-2017. The poor cereal harvest mainly reflects below average Gu/Karan and poorly distributed rains and dry spells, higher than average temperatures, heavy insect infestation (stalk borer) and Quelea quelea birds. Poor households in Togdheer Agropastoral livelihood zone are currently dependent on food purchases as they have consumed all their cereal stocks from the 2018 Gu harvest. Grass fodder regeneration, which is their main income source, is poor to below average. They also have limited livestock assets to sell. Therefore, the food security situation among poor households in Togdheer will likely deteriorate from January onwards.

In summary, current food security outcomes are consistent with the food security outlook for August to December 2018 from the 2018 Post-Gu IPC acute analysis, with most northern livelihood zones classified as Stressed (IPC 2), Guban Pastoral classified as Emergency (IPC phase 4) and Northern Inland Pastoral (NIP) of northwest classified as Crisis (IPC Phase 3). These outcomes are expected to be maintained through May 2019. However, food security conditions are expected to deteriorate in Togdheer Agropastoral and NIP of northeast to Crisis (IPC Phase 3) between January and May 2019.

Central regions

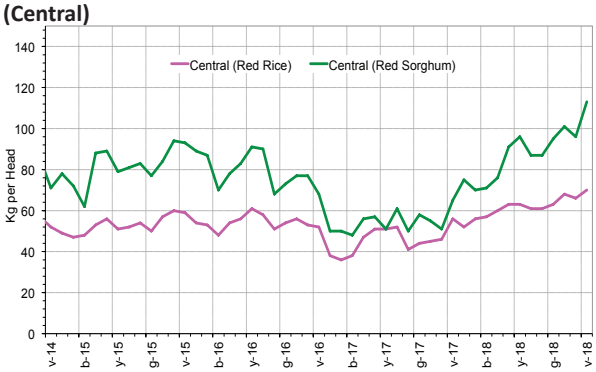
Deyr seasonal rainfall in October and November in central livelihood zones was mostly below average to poor. However, localized areas in Cowpea Belt and Hawd Pastoral livelihood zones received light to moderate rains, which improved pasture and water availability in these few areas. Despite poor rainfall, dry pasture from the 2018 Gu season is still available in most pastoral livelihood zones in central Somalia. The major concern is water availability, particularly in berkad-dependent Hawd and Addun Pastoral livelihood zones as current *Deyr* rains have not replenished berkads and natural water catchments.

Current livestock migration in central regions is normal, with livestock migrating from rainfall deficit areas to other areas within the zone that received better rainfall. Livestock body condition is largely normal (PET score 3) given available dry pasture in most livelihood zones, with the exception of Hobyo and Adaado districts in Addun Pastoral livelihood zone where body condition is below average (PET score 2) due to scarcity of range resources. Further deterioration of livestock body condition is expected during the forthcoming dry Jilaal (January to March) season.

Conception rates among all livestock species were low during the 2017 *Deyr* and medium during the 2018 Gu seasons. Medium kidding/lambing of goats and sheep and low camel calving is reported in central regions between September and November 2018. Milk availability and access at the household level is low in most of the central livelihood zones due to limited fresh pasture and low camel calving. Below average to poor *Deyr* rains with unevenly temporal and

spatial distribution have also adversely affected most parts of the Cowpea Belt Agropastoral livelihood zone. Cowpea crops planted during the current *Deyr* season are not performing well and expected production is likely to be below average to poor in most of the districts.

Figure 7: Regional Trend in Terms of Trade: Cereal to Goat (Central)



Pastoral livelihood zones sustained major livestock losses during the severe 2016/2017 drought and current livestock assets holding among poor households are below baseline levels. As a result, poor households have few saleable animals. The ToT between local quality goat and imported rice, the major staple in pastoral livelihoodsFigure 7: Regional Trend in Terms of Trade: Cereal to Goat (Central) in central regions, showed a moderate increase between July and November 2018 and compared to the five- year average (2013-2017) in most markets of the central regions. The increase in TOT is mostly the result of higher prices for a local quality goat, caused by reduced availability and supply of sellable animals and by improved livestock body conditions. Comparison between current TOT with TOT last year (November 2017) and the November five-year average (2013-2017) depicts a moderate increase of 25 percent (Figure7).

Improved Pasture in Pockets Hawd, Galkayo, Mudug Region, FSNAU, November 2018

The food security outlook for August to December 2018 based on the 2018 Post-Gu IPC acute analysis indicated that food security outcomes for all rural livelihoods in central Somalia would be Stressed (IPC Phase2). This was in part based on the climate forecast available in late August 2018, which indicated a greater probability of average to above-average 2018 *Deyr* rains, which in turn was expected to lead to improvements in rangeland resources (pasture, browse and water), livestock body conditions, livestock reproduction and production (milk and meat) and crop production. Although these assumptions have not fully materialized, current food security outcomes in most livelihood zones are consistent with the food security outlook for August to December 2018, remaining Stressed (IPC Phase 2) given low to medium access to milk, better livestock prices and improvements in TOT, and Stressed (IPC Phase 2) is expected to be maintained from January to May. However, given fewer saleable animals coupled with faster depletion of pasture and water resources as well as the expected below-average cowpea harvest in January, poor households in some livelihood zones are expected to face food consumption gaps as early as January to February 2019. As a result, food security outcomes are expected to deteriorate to Crisis (IPC Phase 3) in Addun Pastoral and Coastal Deeh Pastoral and Fishing livelihood zones of central Somalia between January to May 2019.

Southern Regions

Pasture, browse and water conditions have improved in pastoral areas of southern regions. However, water and pasture conditions are expected to deteriorate at faster than normal rates, particularly in Southern Rainfed Agropastoral livelihood zone of Hiran and Gedo and along the coastal areas of Middle and Lower Shabelle regions. Consequently, livestock migration remained normal and livestock body conditions remained average to above average (PET score of 3-4). Milk production and availability is near average to average.

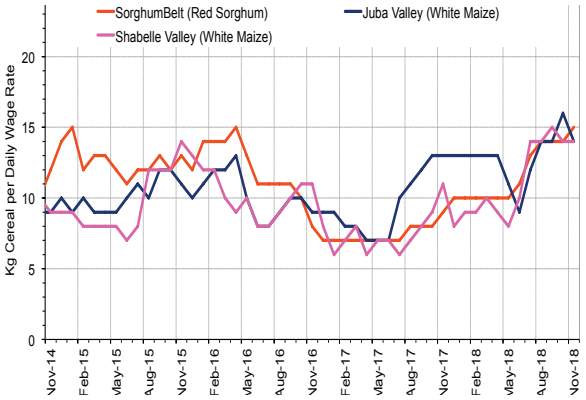
Livestock holdings, particularly small ruminants and cattle, are likely to increase in the coming months in all pastoral and agropastoral livelihoods zones, although herd sizes will most likely remain near baseline or at baseline levels in most areas with herd growth outpacing or just covering off-livestock take rates. The exception is the size of camel herds in Southern Inland Pastoral livelihood zone of Middle and Lower Juba and Gedo regions, where herds of camel are currently above baseline levels.

The local quality goat to cereals ToT in November 2018 increased in most regions compared to one year ago (November 2017). ToT in November 2018 was also higher in most regions compared to the 5-year-average for 2013-2017 and in terms of annual comparisons.

Similarly, the ToT showed an increasing trend in Shabelle and Juba regions between July and November 2018. ToT remained stable in Sorghum Belt and Lower Juba regions. The improved ToT are due to improved livestock prices and decreased cereal prices. The exceptions are in Banadir and Middle Juba where TOT declined slightly (10-11%). However, in all regions, TOT in November 2018 remained above the five-year average for 2013-2017.

Cereal stocks from the 2018 Gu and off-season harvests among poor households in most riverine and agro-pastoral areas have already been exhausted. The exceptions are the major cereal producing regions of Lower Shabelle and Bay, where poor households still have some cereal stocks in November. However, due to below average *Deyr* rainfall amounts and its poor temporal and spatial distribution, total *Deyr* cereal harvests in southern Somalia are expected to be 30 to 40 percent below the long-term average. Off-season cereal harvest in riverine livelihoods, which is typically collected at the end of February/early March, is also expected to be poor due to lack of flood-recession agriculture possibilities and low river levels (Shabelle and Juba) [Figure 8]. However, early-planted, pump-irrigated main season riverine production will likely be average.

Figure 8: Regional Trend in Terms of Trade: Labour to Cereals (South)



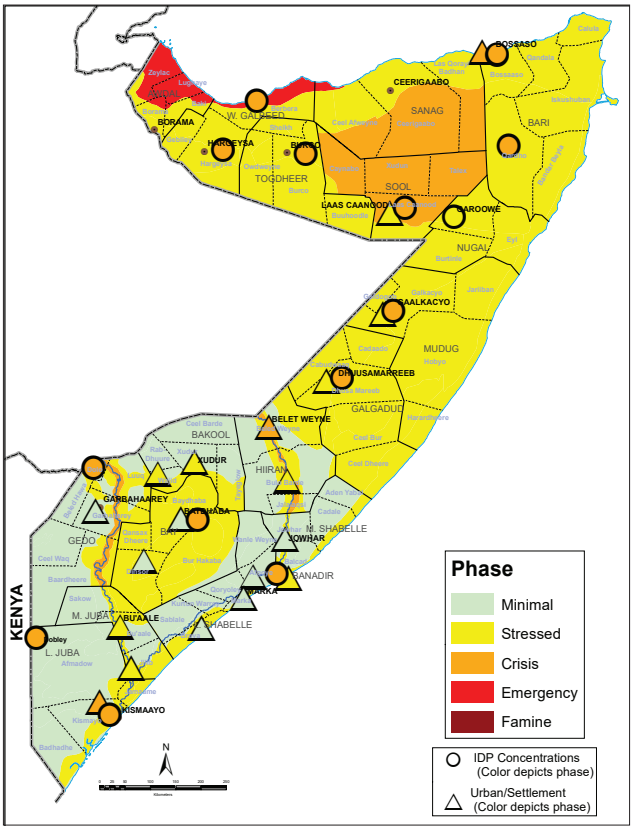
Land Tillage Agro Pastoral Middle Shabelle, Jowhar District, FSNAU, November 2018

Although *Deyr* rains were mostly below average, poor households in riverine and agro-pastoral areas in the sorghum belt and Juba regions had access to seasonal agricultural employment (land preparation, planting, weeding). As a result, the purchasing power of poor households measured through the terms of trade (ToT) between daily labour wage and cereals (sorghum and maize) has improved (by 2kgs/daily wage) in November compared to July 2018. The improvement is driven by declines in cereal prices and increases in wage rates during the 2018 *Deyr* season, despite anticipated below-average harvests. Food prices are expected to remain below-average through May 2019, maintaining favorable ToT.

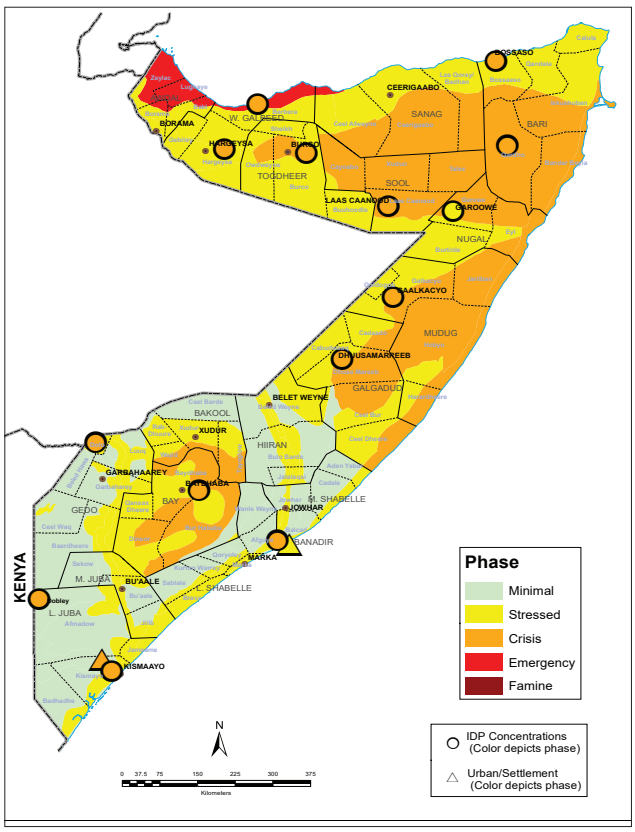
The food security outlook for August to December 2018 based on the IPC acute analysis of August 2018 indicated that food security outcomes for nearly all rural livelihoods in southern Somalia would be Stressed (IPC Phase 2) or Minimal (IPC Phase 1), except in Riverine Pump Irrigation livelihood zones in Gedo and Hiran regions, which were classified as Crisis (IPC Phase 3) due to the impacts of flooding during the Gu. These classifications are mostly consistent with current food security outcomes in southern Somalia and most are expected to be maintained through May 2019. However, poor households in Bay-Bakool Low Potential Agropastoral livelihood zone are expected to face food consumption gaps, given poor Deyr season cereal harvest prospects, and food security outcomes in this livelihood zone are expected to deteriorate to Crisis (IPC Phase 3) between January and May 2019. Riverine Pump Irrigation livelihood zones in Gedo and Hiran are expected to improve to Stressed (IPC Phase 2) through May 2019, given anticipated average early-planted maize production. The proportion of households facing food consumption gaps, which are indicative of Crisis (IPC Phase 3), is likely to increase in agropastoral livelihood zones of Gedo, Hiran, Bay and Bakool, coastal areas of Middle and Lower Shabelle regions and Riverine Gravity Irrigation livelihood of Jamame district of Lower Juba, though overall food security outcomes in these areas are expected to sustain or deteriorate to Stressed (IPC Phase 2).

Somalia Acute Food Insecurity Situation Overview

Map 5: December 2018



Map 6: January-May 2019, Most Likely Scenario



Source: FSNAU and FEWS NET

Recent publications and releases

- *FSNAU Climate Update, November 2018*
- *FSNAU Market Update, November 2018*
- *Joint FEWS NET/FSNAU, Somalia Food Security Outlook, November 2018*

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

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