

Climate

Civil Insecurity

Livestock

Agriculture

Markets

Nutrition

Integrated Analysis

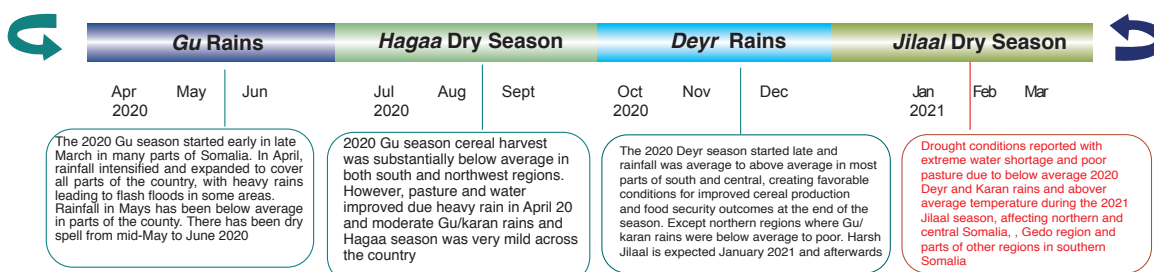
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KEY ISSUES

- Between December 2020 and late April 2021, most parts of Somalia experienced moderate to severe drought as a result of below-average Deyr season rainfall from October to December 2020, warmer-than-normal temperatures during the January to March 2021 Jilaal season and a delayed, poor start and performance of 2021 Gu (March/April to June) season rainfall. Further rainfall is expected through mid-May, covering many parts of the country. However, cumulative rainfall amounts are likely to remain below average in many parts of central and southern Somalia. Moreover continuation of the *Gu* rains in late May through June is uncertain. Accordingly, the 2021 Gu season cereal production in Somalia is expected to be 20-40 percent below average.
- Pasture, browse and water availability continued to deteriorate/or deplete in most of northern and central Somalia and large parts of southern Somalia. Extreme water shortages, widespread reliance on water trucking, and high water prices have been reported in most pastoral and agro-pastoral livelihood zones since January. Most livestock are concentrated near water points with limited migration options. Cases of abortion and livestock death among small ruminants have occurred due to insufficient feed, water, and drought-induced disease in several regions in northern and central Somalia.
- Due to the extended impact of the drought between late December 2020 and late April 2021, the food security situation in most rural livelihoods of northern and central Somalia has deteriorated. Due to limited herd size, lack of saleable animals, lack of access to milk, increased expenditures and high debt levels, most poor pastoral households in northern and central regions face food consumption gaps and are classified as Crisis (IPC Phase 3) between April and September 2021.
- The food security situation in southern Somalia has also continued to deteriorate since the beginning of 2021, driven by the negative impacts of below average 2020 Deyr season main and off-season harvests, a harsh Jilaal that evolved into drought conditions, the delayed, poor start of 2021 Gu season rainfall, and insecurity on agricultural employment opportunities, crop development, and livestock production. Accordingly, most livelihood zones of southern Somalia are currently classified as Stressed (IPC Phase 2). However, a rising share of poor households in these livelihood zones face food consumption gaps, and several areas are projected to be classified as Crisis (IPC Phase 3) between July and September 2021.
- Most of the IDPs in the main settlements and the urban poor are currently facing food consumption gaps due to limited income-generating activities and rising staple food prices that have reduced household purchasing power. As a result, they have been classified as Crisis (IPC Phase 3) between April and June 2021. Given rising food prices and reduced income and employment opportunities, food security outcomes are likely to remain in Crisis (IPC Phase 3) among IDPs in the main settlements and among poor urban households between July and September 2021.
- Approximately 2.73 million to 2.83 million people across Somalia are expected to face Crisis (IPC Phase 3) or worse outcomes between April and September 2021, reflecting the deteriorating food security situation in the country.
- Food assistance reached an average of 1.6 million people per month between January and April 2021. Humanitarian assistance is preventing further deterioration of food security outcomes at the household level in many areas. However, given the scale of need, current level of food assistance is inadequate to prevent widespread Crisis (IPC Phase 3) outcomes. Given the worsening food security situation across Somalia, assistance must be scaled up and sustained through the end of the year.

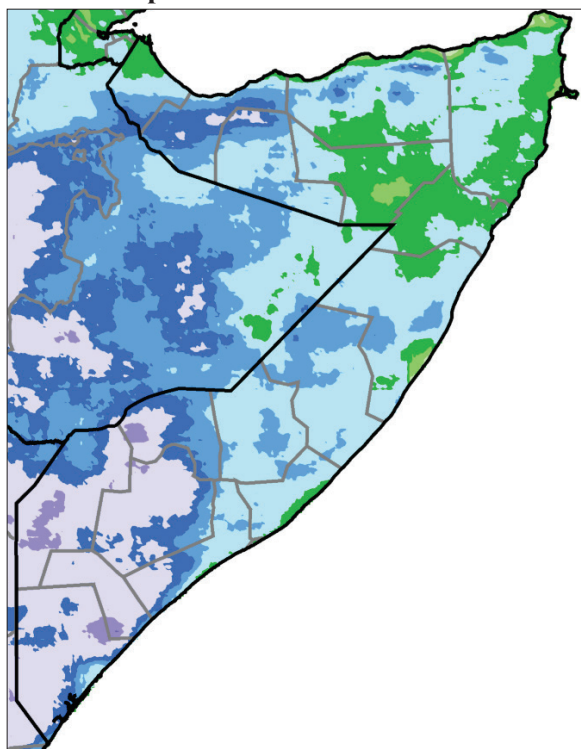
Somalia Seasonal Timeline & Key Events



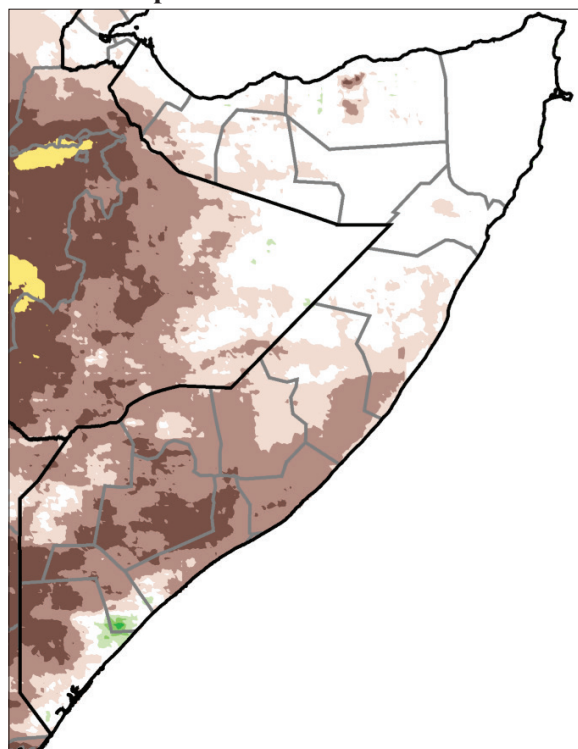
SECTOR HIGHLIGHTS

CLIMATE

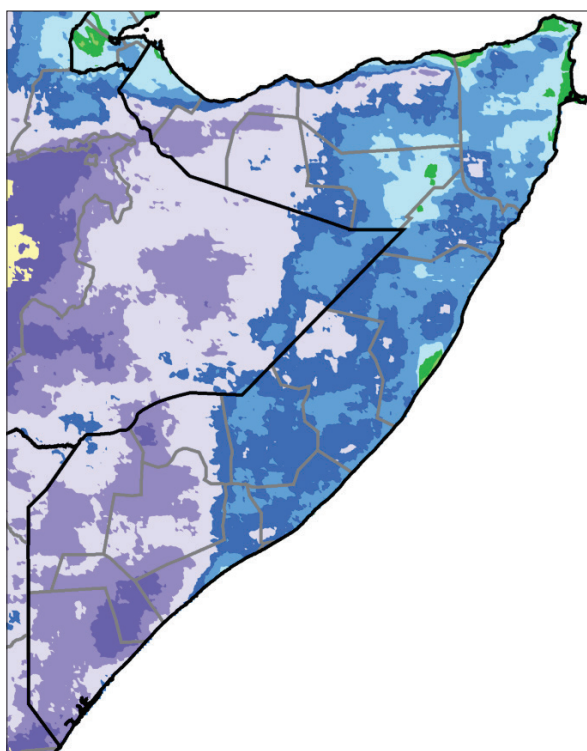
Map 1: Rainfall Total (mm): 1 Mar – to 30 Apr 2021



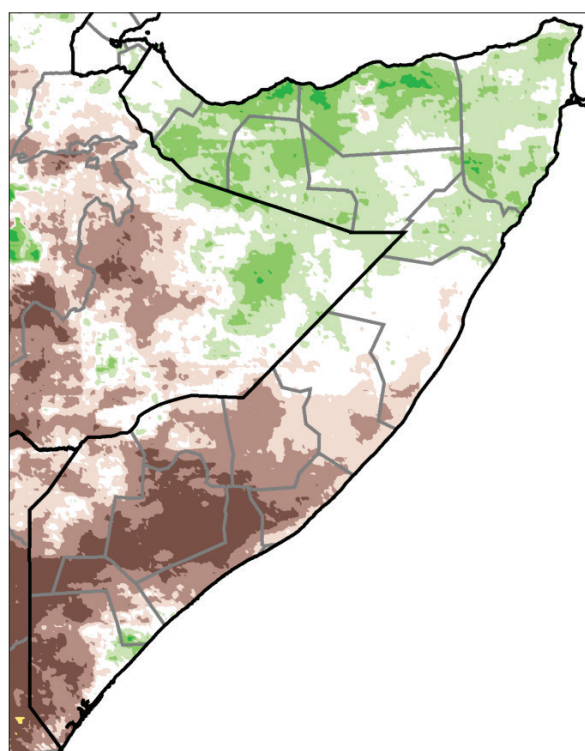
Map 2: Rainfall Anomaly (mm): 1 Mar to 30 Apr 2021



**Map 3: Rainfall Total (mm): 1 Mar to 15 May 2021
(includes forecast data for 1 to 15 May)**



**Map 4: Rainfall Anomaly (mm): 1 Mar to 15 May
(includes forecast data for 1 to 15 May)**



Gu season rainfall typically starts between late March and early April in northwestern and southern parts of Somalia and expands eastwards to cover central and northeastern regions by mid-April. This year, observed rain gauge and satellite data indicate that sunny and dry weather conditions characterized by higher than average daytime temperatures prevailed in most regions of the country in March. Exceptions are some southern districts (Beletweyne, Qanzaadhere, Bardale, parts of Baidoa and Juba regions) that recorded some rainfall of poor distribution and low intensity, mainly in the 2nd dekad of April.

A combination of below average 2020 Deyr (October-December) season rainfall, warmer than normal temperatures during the typically dry 2021 Jilaal (January to March) season and a delayed and poor start of the current (March/April to June 2021) Gu season, worsening drought conditions gripped many parts of the country between late December 2020 and late April 2021.

Rainfall conditions started to improve in late April with most parts of Somalia receiving some rainfall of varying amounts and intensities (Map 1). However, cumulative rainfall between 1 March and 30 April remained below average across most of the country, especially in parts of northwestern and central Somalia and most of southern Somalia (Map 2). Based on available forecasts, further rainfall is expected through mid-May, covering many parts of the country (Map 3). Heavy rainfall is also likely to cause flash floods in some areas. However, cumulative rainfall amounts are likely to remain below average in parts of central and most parts of southern Somalia through May 15 (Map 4). Continuation of Gu rains in late May through June is uncertain. *Hagaa* (July-September 2021) seasonal rainfall in southern Somalia is likely to be below average.

Vegetation cover measured through the Normalized Difference Vegetation Index (NDVI) of 21-30 April indicates significant vegetation deficits in West Golis Pastoral and parts of Hawd Pastoral livelihood zones in the Northwest and most parts of rural central and southern Somalia (Map 5).

Following increased rainfall since the last week of April, water levels of the Shabelle and Juba rivers have increased sharply to exceed the long-term average by early May (Figures 1 & 2). Flooding has already been reported in some parts of Jowhar district. Through at least mid-May, the Shabelle and Juba river water levels are expected to increase further due to the anticipated increase in rainfall amounts in the upper catchments of the two rivers in the southeastern Ethiopian highlands as well as due to increased rainfall inside Somalia. This could trigger further flooding along the Shabelle and Juba river basins.

Map 5: NDVI Percent of Median: 21–30 Apr 2021

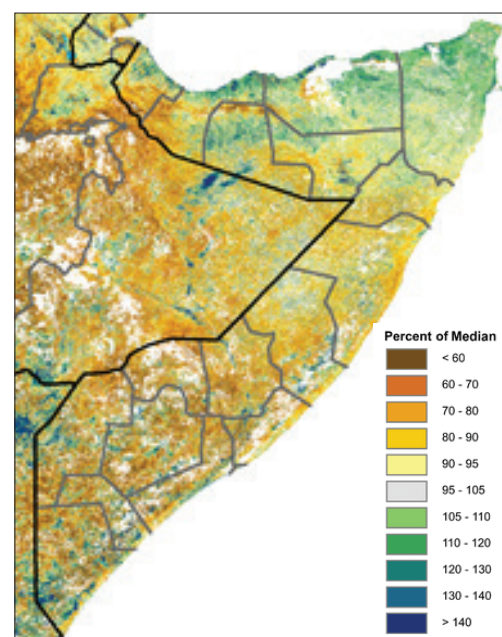


Figure 1: Shabelle River Levels at Beletweyne, Hiran Region

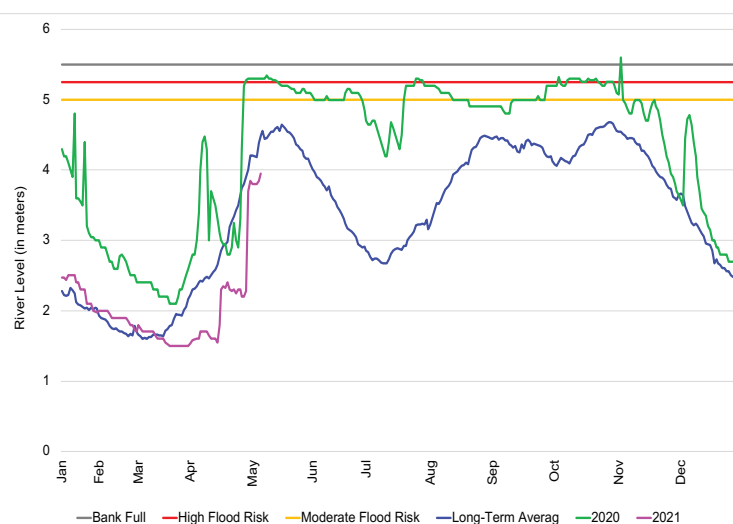
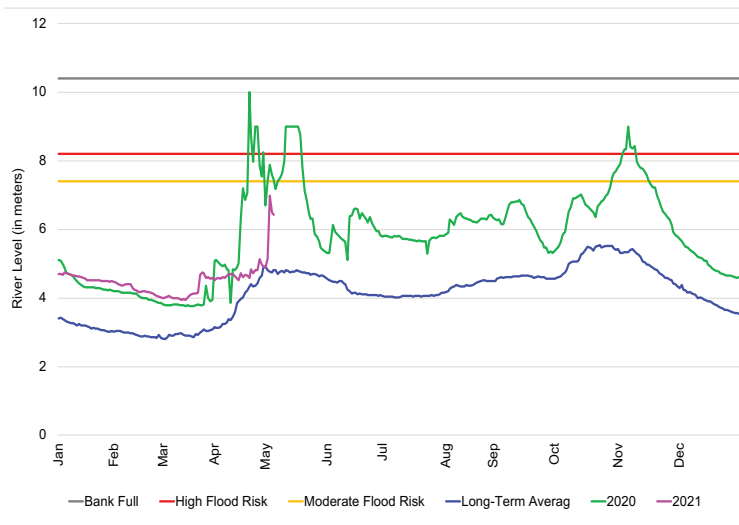


Figure 2: Juba River Levels at Bardhere, Gedo Region



CIVIL INSECURITY

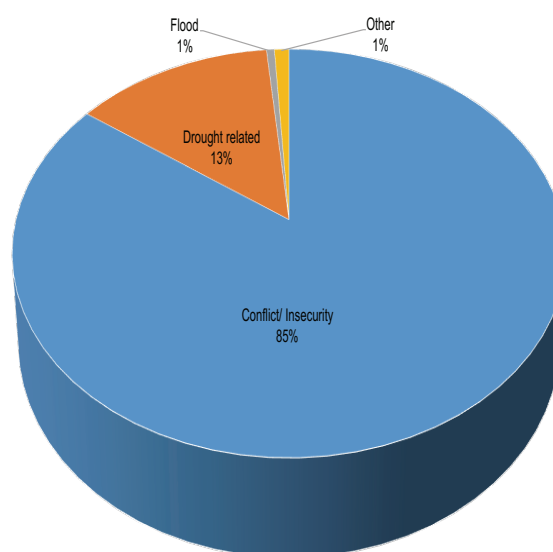
In the first quarter of 2021 (Jan-March), Somalia witnessed political tensions and increased violence due to disagreements over delayed parliamentary and presidential elections. Civil insecurity continued to deteriorate, mostly in the central and southern regions of the country due to attacks by insurgents targeting Somali government forces and African Union Mission in Somalia (AMISOM) bases. Moreover, clashes have also been reported between insurgents and clan militias in Lower Shabelle (Wanlaweyne district) that resulted in the confiscation of livestock from pastoralists and the torching of their settlements and assets by insurgents. Other effects of insecurity include disruptions of trade flows, mainly in Bay (Dinsor and Qansah-dheere districts) and Bakool (Hudur and Wajid districts) regions and parts of Hiran (Buloburte and Jalalaqsi districts). Insurgents continue to collect forced Zakat and illegal taxation in areas under their control.

Additionally, clan and resource-based conflict prevailed in Dhusamareb, Cadaado and Abudwak districts (Galgaduud), Beletweyne and Mataban districts (Hiran), and Wanlaweyne district (Lower Shabelle). Cocalized inter-clan violence was also reported in parts of Sool region.

Based on data obtained from ACLED (The Armed Conflict Location & Event Data Project), a total of 850 security-related incidents were reported across Somalia between 1 January and 30 April 2021, reflecting a 7.3 percent increase in events compared to the same period of 2020. The majority of incidents occurred in Lower Shabelle (27.8%), Banadir (19.2%), Lower Juba (10.7%) and Bay (8.5%) regions. These incidents caused a total of 1,019 fatalities over the same period, with most of the fatalities reported in Lower Shabelle (24.7%), Banadir (16.0%), Lower Juba (10.1%) and Bay (7.6%) regions.

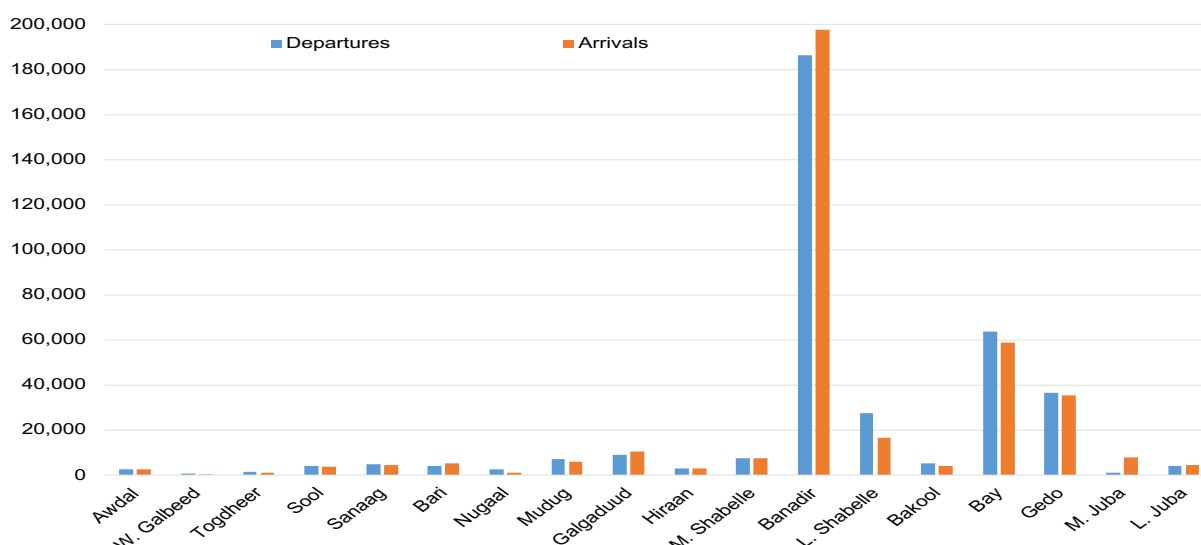
Data from UNHCR's PRMN indicates that approximately 369 700 people have been displaced across Somalia between January and April 2021, mainly due to insecurity (85%) and drought (13%) - Figure 3. Most of the displacements occurred in Banadir (50%), Bay (17%), Gedo (10%) and Lower Shabelle (7%) regions. Most of the displacements have occurred internally within the respective regions (Figure 4).

Figure 3: Main Reasons of Population Displacement, January-April 2021



Data source: UNHCR-PRMN

Figure 4: Population Displacement by Region, January-April 2021



AGRICULTURE

Between late March and early April 2021, FSNAU conducted a rapid food security, livelihoods and off-season crop harvest assessment across Somalia. Based on the results of this assessment, the 2020/2021 Deyr off-season crop harvest is estimated at 12 800 MT harvested in riverine livelihoods of southern Somalia between late February and early March, including 4 100 MT of maize, 1 100 MT of cowpea and 7 750 MT of sesame (see Table 1).

Above-average temperatures in January and February and pest infestations (desert locust, stalk borer, aphids, black field earwig and crickets) have contributed to low crop yields, particularly in Middle and Lower Shabelle, Middle Juba and Gedo regions. Increased off-season production of sesame in Middle Shabelle was mainly attributed to favorable climate (sunny and high temperature), which accelerated floodwater recession in January and February in Jowhar and Mahadey districts, thereby facilitating more recessional cultivation. The 2020/2021 off-season harvests have provided some cereal stocks at the household level and increased cereal availability in the market in these five regions.

Table 1: 2020/2021 Deyr Off-Season Crop Harvest Estimates (in Metric Tons-MT)

Region	Maize	Cowpea	Sesame	All Crops
Lower Shabelle	700	0	100	800
Middle Shabelle	500	200	4 900	5 600
Lower Juba	1 300	400	1 000	2 700
Middle Juba	1 200	500	1 600	3 300
Gedo	400	0	0	400
Total	4 100	1 100	7 750	12 800

Source: FSNAU

The 2021 Gu (April-June) season agricultural activities (land preparation, dry planting and ridging for rainwater harvesting) started in mid-March in most of the main crop growing areas of southern Somalia in anticipation of the onset of the Gu rains. However, farming activities have been impeded by the delayed and poor start of the 2021 Gu season rainfall and low level of the Shabelle river. Extreme temperatures also adversely affected fruit and cash crops as well as early irrigated maize crops in riverine areas. However, land preparation and planting are underway in Cowpea Belt Agropastoral livelihood zone of central Somalia as of late March. In general, seasonal farming activities have created some job opportunities for poor households in agricultural areas of southern Somalia, but labor demand is broadly below normal. Limited income from agricultural labor is expected throughout the remainder of the 2021 Gu season, due to the impact of poor rainfall on seasonal labor demand for land preparation, planting/replanting, weeding, and harvesting.



Land preparation, riverine livelihood, Jowhar, Middle Shabelle region, FSNAU, April 2021

In northwestern agro-pastoral (Awdal and Woqooyi Galbeed), land preparation and planting for first cycle maize for the 2021 Gu/Karan season has been missed due to delayed Gu season rainfall. However, land preparation for long cycle sorghum and second short cycle maize will start in late May, followed by planting in June.

In conclusion, the 2021 Gu season cereal production in Somalia is expected to be 20-40 percent below average.

DESERT LOCUST

After limited damage to pasture was reported in localized areas of Puntland and Somaliland in February, the ongoing Desert Locust upsurge had significantly declined in March. Ongoing control operations, coupled with poor rainfall that was less conducive to hatching, led to declining Desert Locust swarms. However, some swarms and adult groups were reported in April, including in Puntland (near Garowe, Qardho and Galkacyo) and in Somaliland (near Erigavo, Burao, and the plateau between Hargeisa and Borama).

The latest forecasts indicate that Desert Locust swarm breeding is likely to continue during May in parts of northern Somalia that received recent rainfall. This will give rise to hatching and band formation from mid-May onwards, thereby posing a risk to Gu season crop production and pasture availability which have already been adversely impacted by drought conditions. However, the Somali coastal jet stream off the southern coast will likely continue to mitigate the spread of locusts in the Shabelle, Juba and Bay regions.

Figure 5: Desert Locust Infestation, January-April 2021

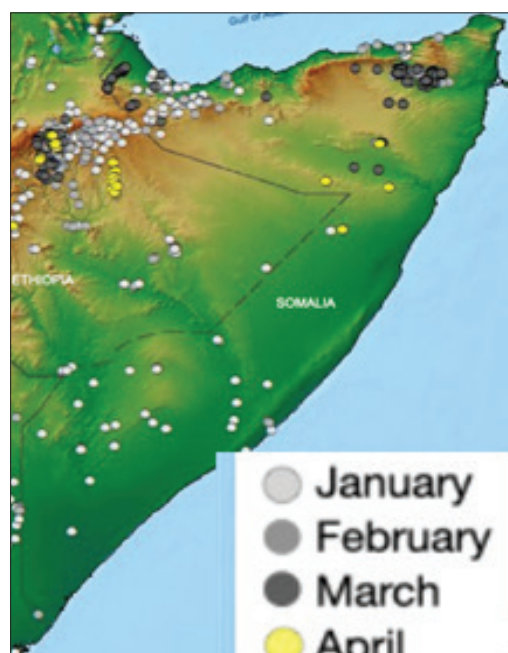
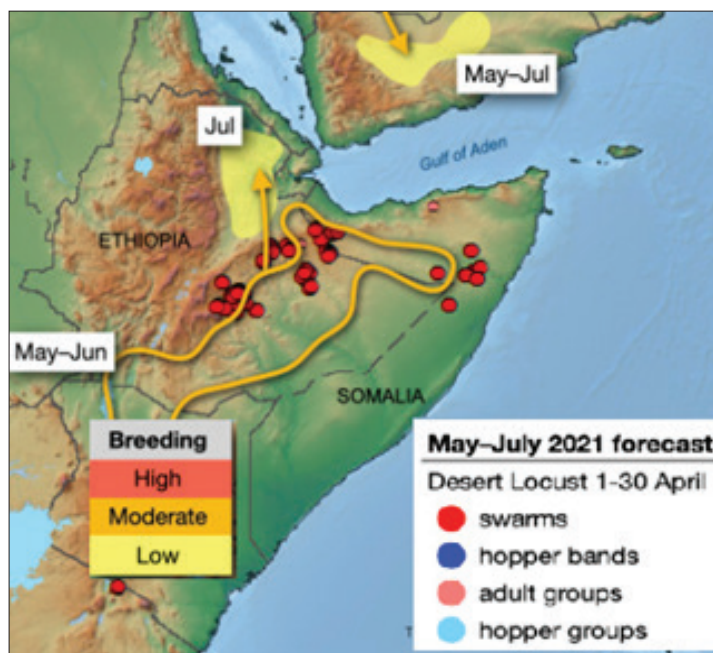


Figure 6: Desert Locust Forecast, May-July 2021



Source of Maps: FAO Desert Locust Watch

LIVESTOCK

Pasture, Water and Livestock Migration

Pasture, browse and water availability continued to deteriorate/or deplete in most of northern and central Somalia and in large parts of southern Somalia as of April, driven by below average to poor rainfall during the 2020 Gu/ Karam and Deyr rains, a harsh 2021 Jilaal (January – March) and a delayed start of the 2021 Gu season rainfall. The worst-affected livelihood zones are Northern Inland Pastoral, Hawd Pastoral, Addun Pastoral, and Coastal Deeh Pastoral. Rapid deterioration and depletion of pasture and browse have also been reported in Southern Agropastoral and Hawd Pastoral of Hiraan, Cowpea Belt Agropastoral and Coastal Deeh Pastoral of Middle Shabelle and all livelihood zones in Gedo region.

Extreme water shortages and widespread reliance on water trucking, resulting in high water prices, have been reported in most of pastoral and agro-pastoral livelihood zones across the country. Most of the natural water catchments and berkeds have dried up, while shallow wells either dried up or have very low water yield due to declined ground-water tables and overuse during the dry and harsh Jilaal season.

Most livestock are concentrated near water points with limited grazing and migration options. In addition, most rural livelihood zones in northern and central Somalia have resorted to an expensive form of livestock feeding using cereal purchased commercially, while crop fodder is being used in southern regions to feed livestock as dry pasture and browse become increasingly scarce.

Livestock Conditions, Production and Reproduction

Due to the harsh Jilaal season, current livestock body conditions range from below average to near average (PET score 2-3) with a deteriorating trend. Body conditions of livestock in rain-deficit areas and body conditions of lactating livestock are poor (PET score 2), while livestock body conditions are near average to average (PET score 3) in areas that have received relatively better rainfall in the South and in localized areas in the North.

In the worst-affected areas, there are cases of abortion and livestock death among small ruminants, as well as culling of goat/sheep kids to save the lives of the mothers. The atypical cases are due to insufficient feed and water and due to drought-induced disease incidence in several regions in northern and central Somalia (Woqooyi Galbeed, Sanaag, northern Mudug, and Galgaduud) and in some regions in the South (Hiran and Gedo). The situation is relatively better in other parts of the North (West Golis Pastoral, Coastal Deeh Pastoral and East Golis of Bari region) and most parts of the South due to relatively better 2020 Deyr season rainfall.

Low camel calving is likely to start in late April and continue up to June 2021. However, medium calving was reported in January and February 2021 for cattle that conceived during the 2020 Gu season.

Livestock Trade and Prices

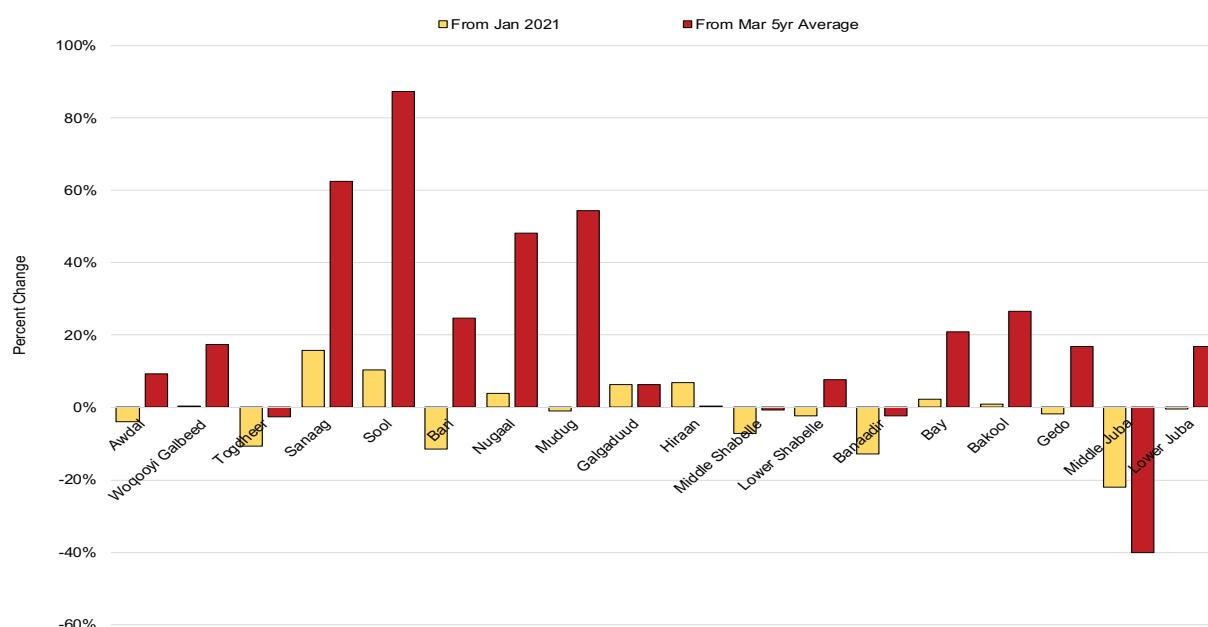
March 2021 livestock prices generally declined slightly or remained stable ($\leq \pm 10\%$ change) in most markets compared to January. The observed price decline is mainly attributed to oversupply in response to increased costs of migration, water trucking and livestock feed. However, livestock prices rose moderately when compared to the March five-year average, except in Middle Juba where prices declined significantly (40%).



Deteriorated body condition- Northern Inland Pastoral- Isku-Shuban- Bari regions, FSNAU, April 2021

Local quality cattle prices in southern Somalia showed a mild decline of less than 10% in March compared to January 2021 due to seasonal increase in market supply and deteriorated livestock body conditions. However, March 2021 cattle prices are still moderately higher (2-61%) compared to the five-year-average in most regions of the country.

Figure 7: Local Quality Goat Price Trends by Region, March 2021



MARKETS AND TRADE

Exchange Rate Trends

From January to March 2021, both the Somaliland Shilling (SLS) in Somaliland and the Somali Shilling (SOS) in the rest of Somalia were stable against the United States Dollar (US\$). However, in comparison to the five-year average, the SOS depreciated at moderate rates (9-14%) in southern and central regions of the country. The depreciation against the US\$ was highest in northeast regions (42%) due to the continued circulation of a large amount of locally printed SOS currency notes in these markets. In contrast, the exchange rate between the SLS and US\$ exhibited relative stability compared to the five-year average.

Cereal Imports and Commodity Price Trends

Prices of most imported food items (rice, wheat flour, sugar and vegetable oil) showed mild changes (mostly increases) in most markets across Somalia in March 2021 compared to January 2021. With respect to last year and the five-year average, the prices of imported commodities changed at mild rates in most markets. Exceptions are markets in Puntland, which has been affected by depreciation of the local Somali Shilling, as well as parts of Sorghum Belt regions

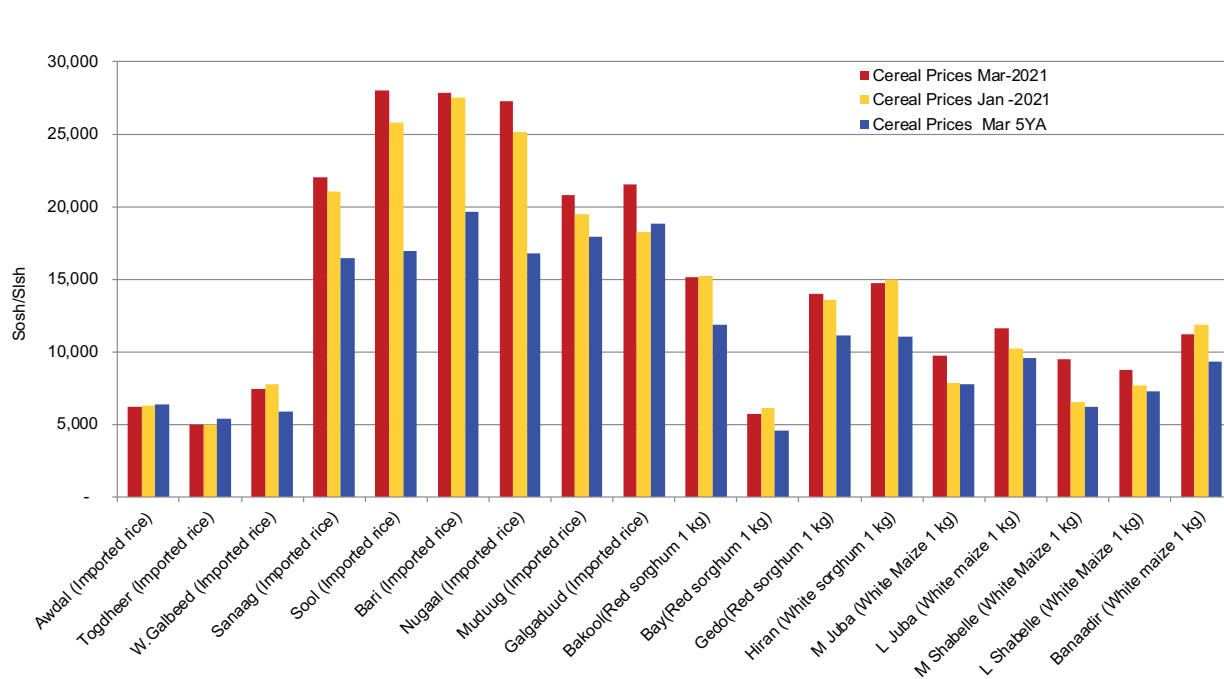
(Bay, Bakool and Hiran regions) that have been adversely affected by trade and movement restrictions imposed by the insurgents. In these areas, most of the above commodities have increased significantly (30-40%) in the last year and compared to the five-year averages.

From January to March 2021, a total of 2 200 metric tons of sorghum and maize was imported from Ethiopia to central and northern Somalia. This is lower (8%) when compared to cross-border imports for the same period last year (January to March 2020), attributed to clan conflicts along the cross-border trade routes. In addition, 30 136 metric tons of food items (mainly sugar, wheat flour and rice) were imported through the ports of Somalia and re-exported to Ethiopia and Kenya. This is also slightly lower (4%) when compared to re-export volumes during the same period of last year.

Consumer Price Index (CPI)

The Consumer Price Index (CPI) for the main reference markets across Somalia, measured through changes in the cost of items in the Minimum Expenditure Basket (MEB), increased slightly (3-7%) in southern, central and northeastern markets due to the reduced supply of sorghum from the 2020 Deyr season harvest as well as reduced cross-border imports from Ethiopia. Meanwhile, the CPI remained relatively stable in the Northwest. The annual comparison (March 2021-March 2020) indicates an increase in the CPI (9-21%) throughout the country due to the below-average 2020 Karan and Deyr cereal harvests and the depreciation of the local currency in Puntland markets.

Figure 8: Regional Trends in Cereal Prices, March 2021



NUTRITION

In Somalia, high levels of acute malnutrition tend to persist across most population groups due to several factors, including high morbidity, low immunization and Vitamin-A supplementation, poor care practices and widespread acute food insecurity.

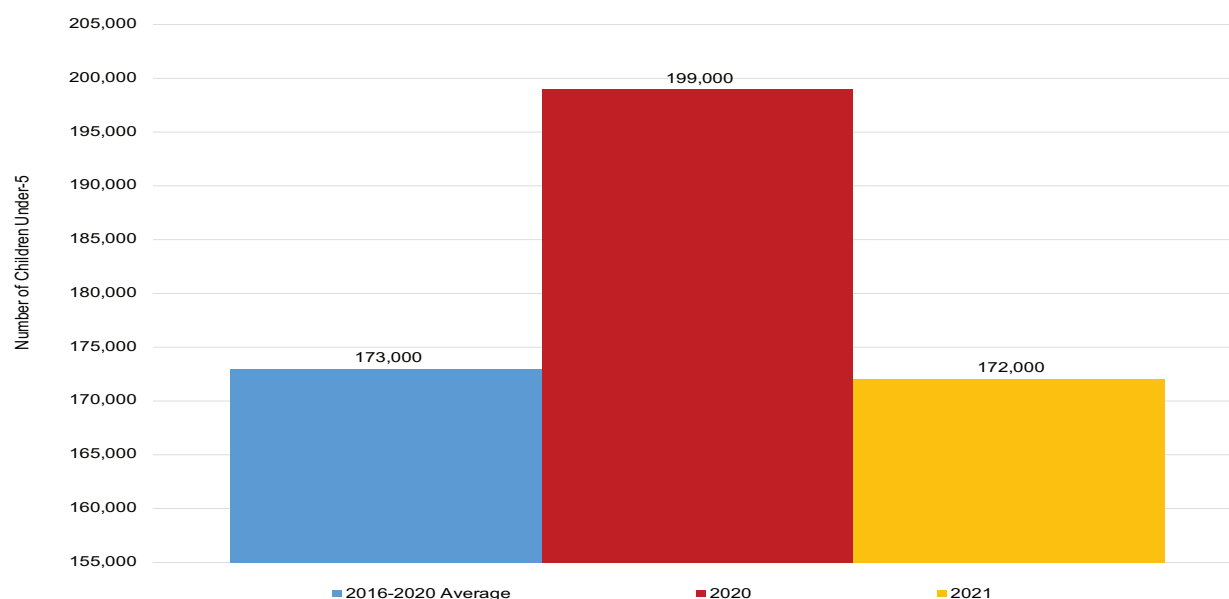
In January 2021, FSNAU and partners estimated that nearly 838 900 children under the age of five years (total acute malnutrition burden) face acute malnutrition between January and December 2021, including 143 200 likely to be severely malnourished.

Data obtained from the Somalia Nutrition Cluster and its partners indicate that new admissions of acutely malnourished children for treatment between January and April 2021 were more or less similar to the January to April average for 2016-2020. However, admissions were 13.6 percent lower compared to the levels for the same period in 2020 (Figure 9). Levels of acute malnutrition could increase through the end of the year in line with seasonal trends and due to the extended combined impacts of drought, floods and insecurity.

Data obtained from the Somalia Health Cluster and WHO, between January and April 2021, indicate 89 percent decline in AWD/cholera cases across Somalia compared to the January-April average for 2016-2020. (Figure 10). The largest number of AWD/cholera cases (≥ 100 cases) were reported in the following regions: Bay (256 cases), Gedo (154 cases), Galgadud (125 cases) and Banadir (102 cases). AWD/ cholera could increase at least through the end of May 2021 in Hiran and Middle Shabelle as well as other riverine regions due to possible flooding of the Shabelle and Juba rivers, which would reduce access to clean water and sanitation.

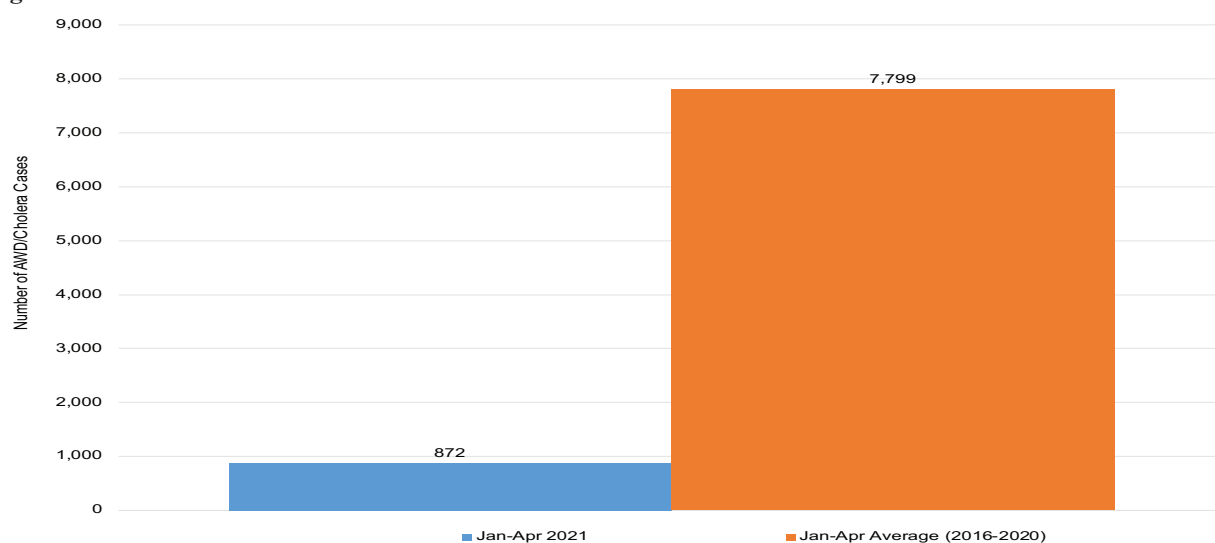
According to data obtained from the Somalia Health Cluster and WHO, there has also been a 63 percent decrease in reported measles cases across Somalia compared to the January-April average for 2016-2020 (Figure 11). The largest number of measles cases ($\geq 99/100$ cases) were reported in Banadir (280 cases). Middle Juba (225 cases), Middle Shabelle (206 cases), Bay (198 cases) and Lower Juba (99 cases) regions.

Figure 9: Somalia: Trends in New Monthly Admissions of Acutely Malnourished Children for Treatment



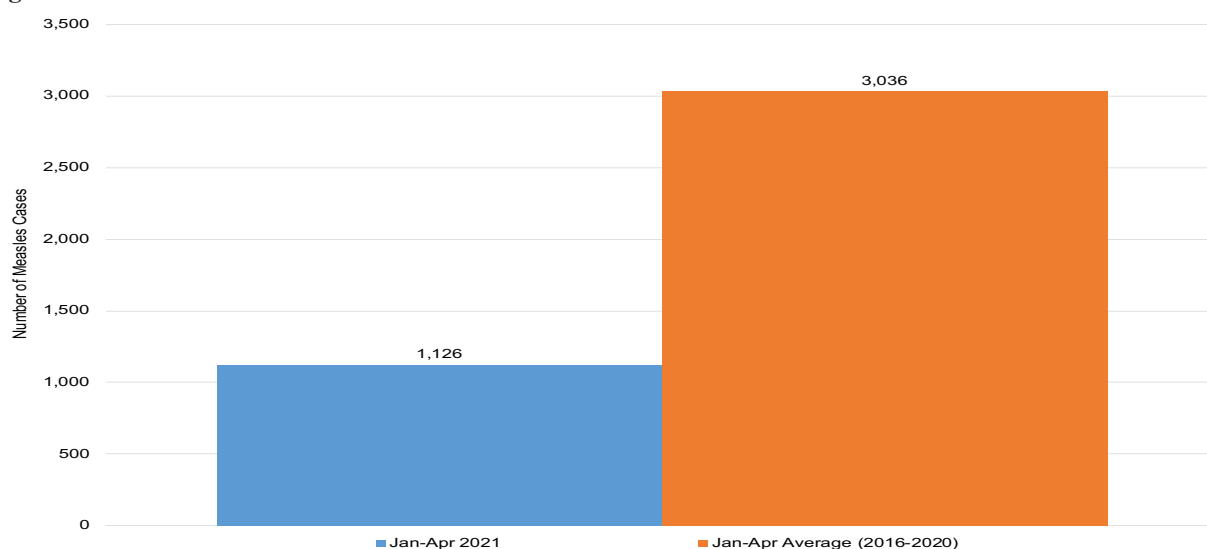
The socio-economic impacts of COVID-19 (mainly declines in remittances and household employment and incomes) are likely to lead worsening nutrition outcomes among vulnerable groups, including poor households in urban areas and among Internally Displaced Persons (IDPs) who live in crowded, unhygienic conditions and makeshift shelters in the context of increasing food prices, declining remittances as well as reduced employment and income-earning opportunities.

Figure 10: Trends in AWD/Cholera Cases in Somalia



Data Source: Somalia Health Cluster/WHO

Figure 11: Trends in Measles Cases in Somalia



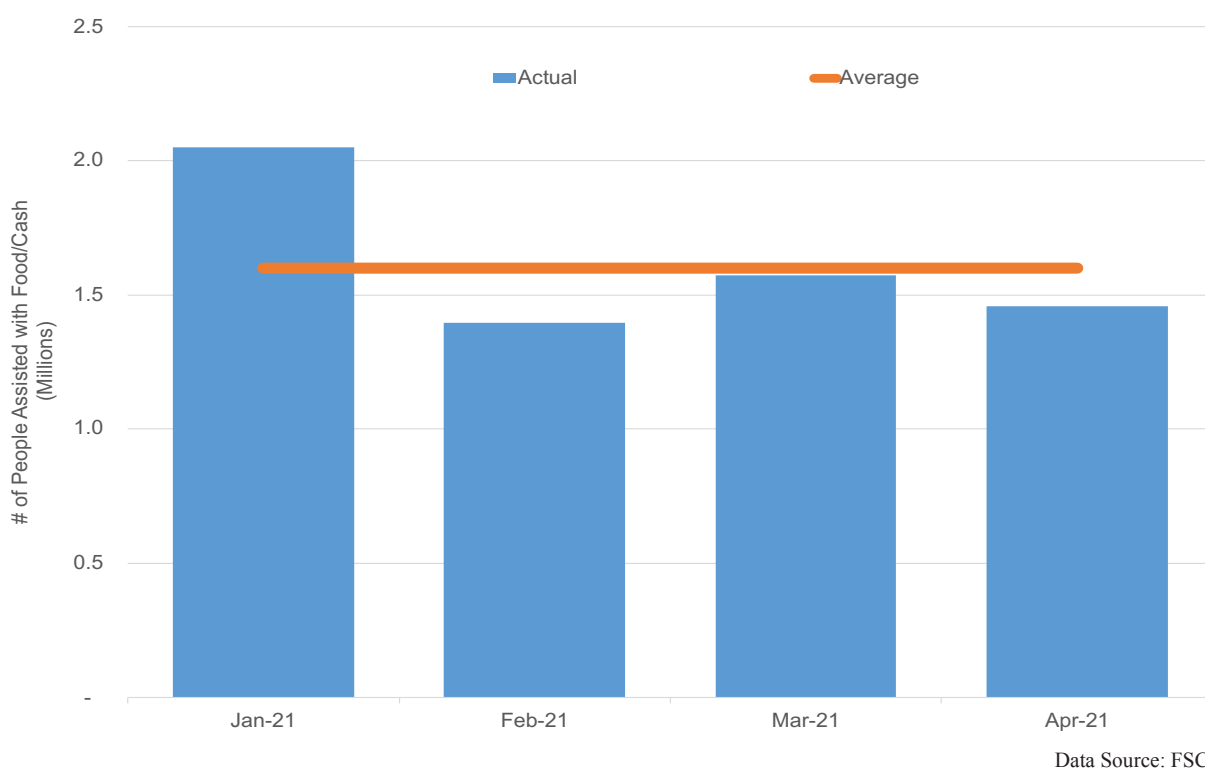
HUMANITARIAN ASSISTANCE

Based on data obtained from the Somalia Food Security Cluster (FSC), food assistance reached 1.4 million to 2.1 million people between January and April 2021 or an average of 1.6 million people per month (Figure 12).

Sustained humanitarian assistance is further deterioration of food security outcomes across many parts of Somalia. However, given the scale of need, current level of food is inadequate to prevent widespread Crisis (IPC Phase 3) outcomes.

Given the worsening of food security situation across Somalia, assistance must be scaled up and sustained through the end of the year.

Figure 12: Food/Cash Assistance Across Somalia, January to March 2021



URBAN

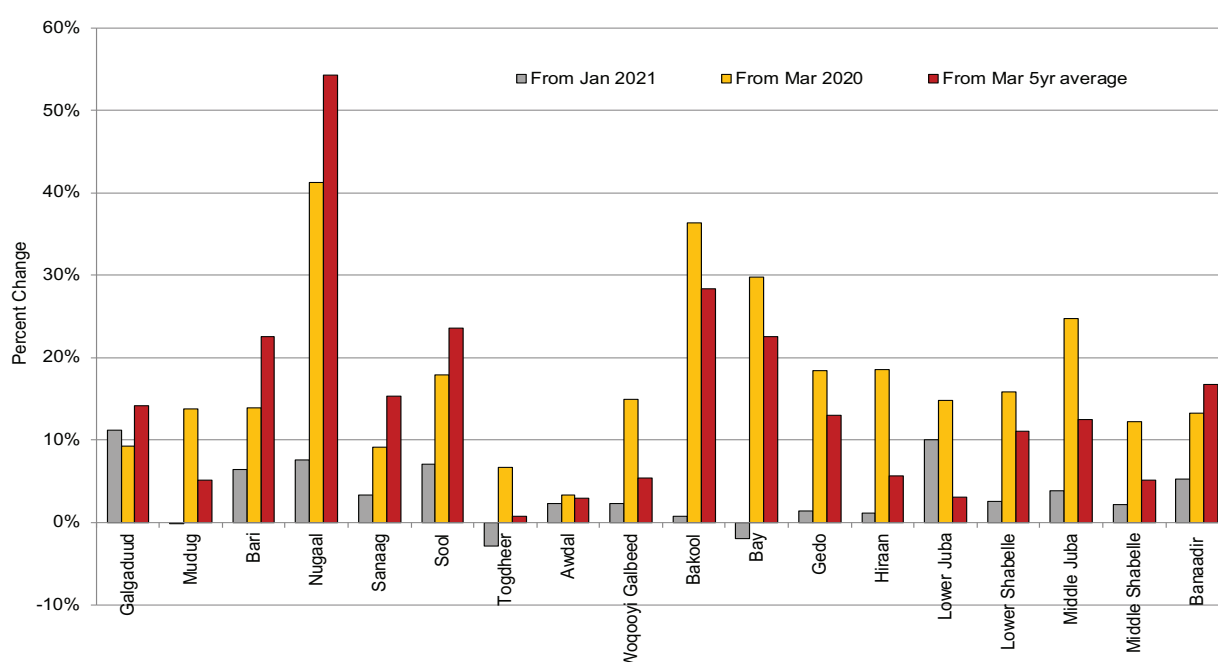
Urban populations across Somalia, including a large proportion of the 2.6 million Internally Displaced People (IDPs) are mostly dependent on market purchases to access food. Additionally, IDPs access food through humanitarian assistance. Poor urban households, and almost all IDPs, typically spend a large proportion of their income on food purchases. With limited income diversification, both groups are vulnerable to increases in food prices. Terms of Trade (TOT) between daily wage labor rates (the main source of income among poor urban households, including IDPs) and staple food prices as well as changes in the Cost of a Minimum Expenditure Basket (CMEB) are used by FSNAU and FEWS NET to assess changes in the purchasing power (food access) among the urban poor and IDPs. The MEB consists of essential food and non-food items.

Between January and March 2021, CMEB exhibited low ($\leq \pm 10\%$) to moderate (10-19%) increases in most regions. Moderate CMEB increases were reported in Nugaal, Galgaduud and Middle Juba, mainly due to increases in local cereal prices. Similarly, comparisons to both the annual and five-year average indicate moderate (17-40%) to high ($>40\%$) increases in the CMEB, reflecting the erosion of purchasing power among poor urban households and IDPs and thereby affecting their access to food.

The prices of most imported food commodities (rice, sugar, wheat flour and vegetable oil) indicated mild changes (mostly increases) in March 2021 compared to January 2021 in most regions of the country due to increasing international prices. Compared to both last year and the five-year average, prices of imported food items exhibited moderate to high increases with the highest increases (34-80%) reported in the Northeast (due to depreciation of the local currency in recent years) and in Bay and Bakool regions (due to illegal taxation and restricted trade flow imposed by insurgents in these regions in recent months).

In most regions, local cereal prices (maize/sorghum) indicated mild changes (mostly increases) between January and March 2021, with the exception of Shabelle and Juba regions where local cereal prices increased moderately (14-46%) due to reduced supply. Similarly, March 2021 local cereal prices are higher (by 13-40%) compared to both last year and five-year-average in most regions of the country. Further increases in local cereal prices are expected in the coming months as traders and farmers hold to their stocks due to concerns over prospects for the 2021 Gu harvest.

Figure 12: Cost of Minimum Expenditure Basket (CMEB): March 2021 compared to Jan 2021 and Mar Five-Year Average



The ToT between the daily labor rate and the relevant staple cereal price either remained stable or showed a decline (by 1-3 kg of cereals/daily wage) across most regions of Somalia between January and March 2021. The exception to this trend is Middle Shabelle, where the ToT declined significantly (by 7 kg/daily wage) due to a sharp increase in local white maize prices and a concurrent decrease in the local daily labor wage. Comparisons to the annual and five-year average indicate lower ToT (by 1-6 kgs/daily wage) for March 2021 due to rising cereal prices and/or a decline in the daily labor wage rates this year.

Based on the above, most of the IDPs in the main settlements and the urban poor are currently facing food consumption gaps. As a result, they have been classified as Crisis (IPC Phase 3) between April and June 2021. Given, rising local and imported food prices and poor 2021 Gu season harvest prospects, food security outcomes are likely to remain in Crisis (IPC Phase 3) among IDPs in the main settlements and among poor urban households between July and September 2021.

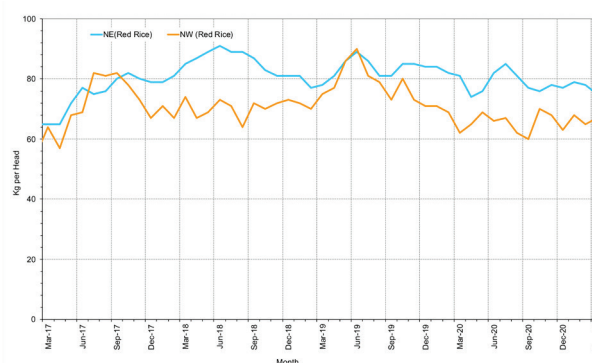
RURAL

Northern regions

Drought conditions have prevailed between December 2020 and late April 2021 in most northern rural livelihood zones. Drought conditions were the result of below- average rainfall during the preceding Deyr (October-December 2020) season, above-average temperatures during the 2021 Jilaal (January-March) season and a delayed and poor start of the 2021 Gu (March/April-June) season. Drought, coupled with desert locust damage in some areas, led to the rapid depletion of pasture and browse in most pastoral and agro-pastoral livelihood zones.

Pasture and browse depleted earlier than anticipated in parts of the Northeast, where Cyclone Gati brought heavy rainfall in late November 2020. The depletion is due to the abnormal in-migration of a large number of livestock into the area from adjacent regions. Extreme water shortages and widespread water trucking with sharp increases in water prices were reported among the berkad-dependent pastoral livelihoods (Northern Inland Pastoral, Addun Pastoral, parts of Hawd Pastoral, Northwest Agropastoral and Toghdeer Agropastoral), Southern Inland Pastoral of Gedo and parts of Juba regions. Field reports indicated that water prices increased two- to three-fold compared to the five-year average in some of the worst-affected, remote areas. For instance, in Huddun (Sool region), the water price increased 144% in March compared to January 2021 and 158% against the five-year average (2016-2020).

Figure 13: Trends in the Goat to Cereal Terms of Trade in Northern Regions



Source: FSNAU and FEWS NET

Most livestock are concentrated near water points, with limited migration options. Exceptions are livestock owned by wealthier households who kept their livestock far away from water points to benefit from leftover dry pasture and purchased expensive water trucking for their livestock. In addition, pastoral households are also engaged in hand-feeding (using boiled cereals) of breeding/lactating and weak animals.

In most drought-affected areas of northern Somalia, livestock body conditions are poor to average (PET score 2-3). The worst-affected animals are those that gave birth during the past six months (2020 Deyr and 2021 Jilaal seasons) and have a PET score of 2 (poor). Cases of abortion and culling of kids of small ruminants to save mothers have been reported due to insufficient feed and water. Drought-induced livestock diseases were reported in Northern Inland Pastoral, parts of Hawd Pastoral and Addun Pastoral livelihood zones. As drought conditions worsened through mid-April, more livestock deaths (mostly young kids/lambs and milking animals) were reported. Drought conditions have also adversely affected livestock births (kidding/lambing/calving), herd growth and milk production. However, low to medium kidding and lambing were reported in some areas, particularly areas that received better rainfall in the preceding 2020 Deyr season. Low camel calving is likely to start in late April and continue up to June 2021. Among poor pastoral households of the North, access to milk and income from the sale of milk is expected to improve slightly

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but will remain below average due to limited livestock holdings. Livestock holdings among poor households of northern Somalia were already below baseline and have declined further due to increased off-take, related to increased livestock sales as well as culling, deaths and low births during the drought.

In agro-pastoral areas of the North (Wogooyi Galbeed and Toghdeer regions), land preparation and planting for first cycle maize for the 2021 Gu/Karan season has been missed due to delayed Gu season rainfall. However, land preparation for long cycle sorghum and second short cycle maize will start in late May, followed by planting in June. However, due to the delayed and poor start of the Gu rains as well as pest infestations such as desert locust, the 2021 Gu/Karan season cereal production is likely to be below average. The first cycle maize planting has already failed, and only second cycle maize and long-cycle sorghum will be harvested in November under the assumption that Gu/Karan season rainfall will continue through September.



Water trucking. Northern Inland pastoral, Hudun district, Sool region, FSNAU, March 2021

The average goat price declined mildly (2-4%) in both northeastern and northwestern regions between January and March 2020. Similarly, local quality cattle prices in the Northwest showed a mild decline (2%) over the same period. These price declines are attributed to deteriorated livestock body conditions. However, local quality goat prices are higher compared to the five-year average in most of the northern markets, mainly reflecting limited supply. Cattle prices are also higher (by 35-61%) compared to the five-year average in both northwestern and northeastern regions due to limited supply.

Imported rice is the main staple food among pastoral communities in northern Somalia. In the northeastern reference markets, the price of rice increased (4%) between January and March 2021 and 47 percent compared to the five-year average for March (2016-2020). In the northwestern reference markets, the price of rice declined (3%) in the first quarter of 2021 but showed an 8 percent increase compared to the five-year average. As a result, the ToT between goat and rice decreased slightly in both the Northwest (1%) and Northeast (5%), mainly due to the decline of goat prices in March compared to January 2021. The ToT between goat and white sorghum in the Northwest showed an 8 percent decline between January and March 2021 but an 11 percent increase compared to the five-year average, mainly due to an increase in goat prices this year. In the Northeast, the ToT between goat and red sorghum indicates an 8 percent decline in the first quarter of 2021 but an 8 percent increase compared to the five-year average. However, poor households with limited livestock holding are not expected to benefit from favorable ToT as they own few saleable animals due to the impact of recurrent drought since 2016/2017, including increased sales and losses during the drought. The drought has also adversely affected milk access (both for consumption and as a source of income) among poor pastoral households of the North.

Due to the extended impact of the drought (reduced milk production, fewer sealable animals, increased indebtedness), the food security situation in most northern livelihood zones has deteriorated. Accordingly, most rural livelihood zones of the North currently face food consumption gaps and are classified as Crisis (IPC Phase 3) between April and June 2021. However, West Golis Pastoral, Hawd Pastoral of Northwest and Northeast and East Golis Pastoral of Northeast are classified as Stressed (IPC Phase 2) due to relatively better livestock holding and access to milk among pastoral households in these livelihoods. Crisis (IPC Phase 3) food security outcomes are expected to become more widespread in the North through September 2021 due to the extended and expanded impact of the drought, with only West Golis Pastoral of Northwest and East Golis Pastoral of Northeast likely to remain Stressed (IPC Phase 2).

Central regions

Drought conditions have also affected key pastoral livelihood zones of central regions. As of early April, pasture and water sources have been almost depleted. The worst affected livelihood zones include Hawd Pastoral of Cabudwaq district, Coastal Deeh Pastoral of Hobyo district and the entire Addun Pastoral livelihood zone. Drought conditions in central Somalia have been exacerbated by desert locust infestation during the October to December 2020 Deyr season and limited migration options due to persistent insecurity.

Field reports confirmed high indebtedness among poor pastoral households due to extended and expensive trucked water purchases for livestock and human consumption and feeding of livestock using commercially purchased cereals since February 2021. High water prices have been widely reported across most herder dependent areas of Hawd Pastoral and Addun Pastoral livelihoods. As a result, livestock body conditions in central regions ranged from below average to poor (PET 2 -1). Cases of livestock abortion and death (lactating and newly born kids of the small ruminants) have been reported. Livestock reproduction, milk availability and availability of saleable animals are limited among poor pastoral households in these livelihood zones. Livestock holdings among poor households in most of the livelihood zones in central Somalia remain well below baseline. Now, holdings are declining further due to low conception in the preceding 2020 Deyr season as well as increased abortion and deaths during the 2021 Jilaal (January-March) period.



Death of Kids. Dhusa mareeb, Galgadud, FSNAU, March- April 2021

Land preparation and dry planting of cowpea and sorghum crops were reported in most of Cowpea Agropastoral of central Somalia. However, due to the delayed and poor start of the Gu rains and the persistent threat of desert locust, 2021 Gu season cereal production in central Somalia is likely to be below average.

Debt levels among poor pastoral households remain high in all central livelihoods. On average, poor households report their debt is US\$ 440 in Hawd Pastoral, US\$ 450 in Addun Pastoral, US\$ 350 in Coastal Deeh Pastoral and US\$ 550 in Cowpea Belt Agropastoral due to increased expenditures on water trucking and livestock feed purchases. These debts are unlikely to be paid this year.

Local quality goat prices exhibited mild increases (2%) between January and March 2021 in central regions. Local quality goat prices in March 2021 moderately increased (27%) compared to the five-year average (2016-2020) due to reduced supply this year. However, rice prices in March 2021 increased moderately (13%) compared to January 2021 and 15 percent compared to the five-year average. As a result, in March 2021, the ToT between local quality goat and rice declined by 10 percent due to rising rice prices. However, the goat to rice ToT was 12 percent higher compared to the five-year average, mainly due to high goat prices this year. Similarly, ToT between local quality goat and red sorghum showed a mild decline (3%) in the first quarter of 2021 and a moderate (22%) increase compared to the five-year average.

Due to limited herd size and lack of saleable animals, lack of access to milk and increased expenditure and debt levels, most poor pastoral households in central regions face moderate food consumption gaps. As a result, Addun Pastoral, Hawd Pastoral and Coastal Deeh Pastoral are classified as Crisis (IPC phase 3) between April and June 2021. In the Cowpea Agropastoral livelihood zone of central Somalia, poor agropastoral households face moderate food consumption gaps due to the failed 2020 Deyr season crop harvest coupled with a delayed and poor start of the current Gu season. Accordingly, the Cowpea Belt Agropastoral livelihood zone of central region is classified as Crisis (IPC phase 3) between April and June 2021. Due to the extended impact of the drought all livelihoods of central regions are expected to remain in Crisis (IPC Phase 3) through September 2021.

Southern Regions

The Shabelle River is the main water source for riverine communities in Hiran and Lower and Middle Shabelle regions. Based on assessments conducted by FSNAU between late March and early April, low Shabelle river water levels during the Jilaal season resulted in severe water shortages for irrigation and human consumption during the Jilaal season. Accordingly, the 2020/2021 Deyr off-season crop production is estimated at 12 800 MT, including 4 100 MT of maize, 1 100 MT of cowpea and 7 750 MT of sesame. The off-season maize crop harvest was somewhat lower than earlier projections made in January 2021, especially in the Middle Juba, Lower Juba, Gedo and Middle Shabelle regions. This low production resulted from high temperature with hot and dry winds in February and March, and locust damages on early-germinated off-season crops. Nevertheless, the off-season maize production has contributed to local cereal availability at the household and local market levels. However, supplies have started to decline as stocks dwindle.

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Farm labor demand during the first quarter of 2021 was low in most rural areas as this period coincided with the lean season when agricultural activities were limited, with the exception of cash crop and off-season cereal harvests in riverine areas. Normally, agriculture labor demand would improve between April to July due to the Gu cropping season agricultural activities (land preparation, planting and replanting, weeding and harvesting). Although agricultural activities have created some employment opportunities for poor households in these regions, the scope of seasonal agricultural activities and casual labor demand in most agropastoral and riverine livelihood zones are below normal due to the delayed, poor start of 2021 Gu season rainfall coupled with low river levels.

Consequently, agricultural labor wage rates declined in most southern regions between January and March 2021. The daily agricultural wage rate declined in Juba (19%), Bakool (16%), Shabelle (6%), Hiran regions (6%) and Gedo (5%). However, the rate increased in Bay (18%). Consequently, the ToT between the agricultural labor rate and cereals has declined in most southern regions compared to three months ago (January 2021). The ToT declined from January to March 2021 in Shabelle Valley (by 2kg/daily wage), Juba Valley (by 1kg/daily wage), and Gedo (1kg), but remains stable in Hiran & Bakool. In contrast, the wage increased in Bay (1kg/wage). Compared to the five-year average, the ToT was higher in Sorghum Belt (by 2kg/daily wage), but was lower in Shabelle (by 1kg / daily wage).



Harvested Sesame crop at riverine Balcad, Middle Shabelle, FSNAU, March 2021

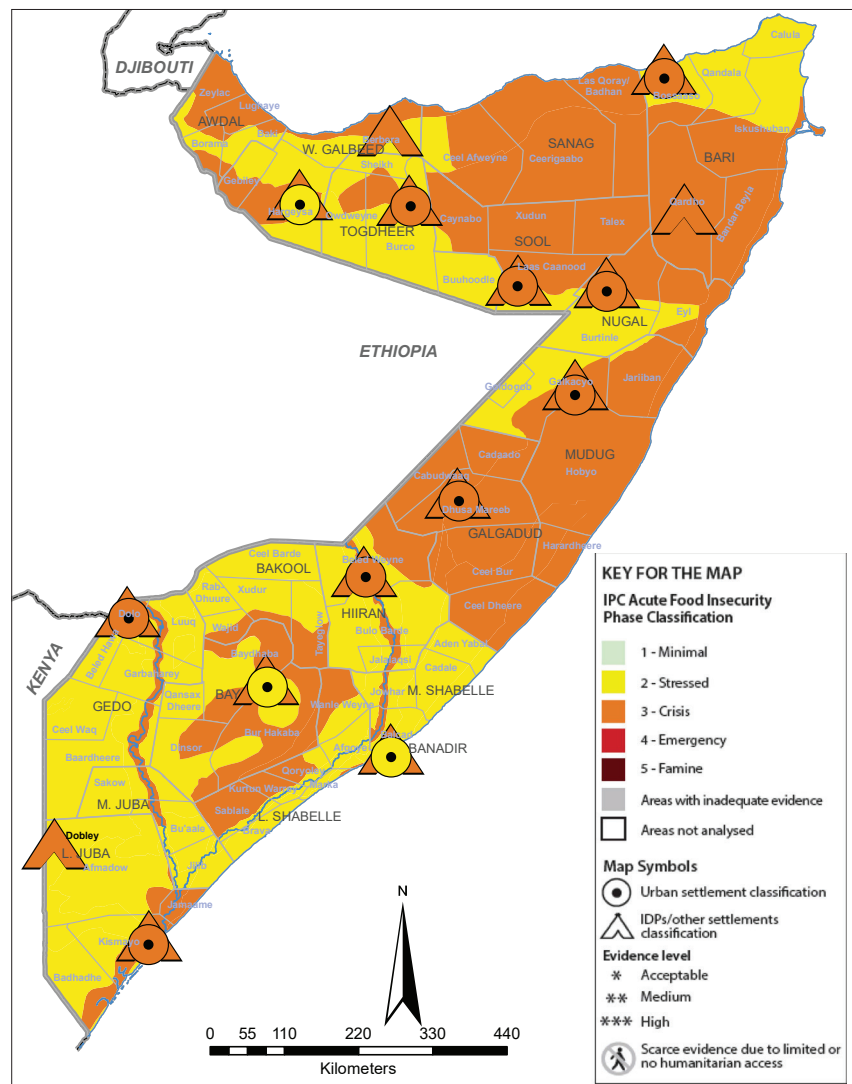
The FSNAU assessment results indicated a deterioration of pasture and browse in most parts of southern Somalia. During the first half of April, pasture conditions ranged from near to below average to poor in most of the rural livelihood zones. Moreover, significant water shortages were reported in parts of Gedo, Middle Juba, Lower Shabelle and Hiran region (mostly in Hawd Pastoral, Juba Cattle Pastoral and Southern Inland Pastoral livelihood zones). This situation has led to increased livestock outmigration towards riverine and remote grazing areas. Livestock body conditions are average (PET score 3) in most of the South, except in Gedo and Hiraan regions where livestock body conditions are below average (PET score 2). However, sporadic rainfall in March and April has slightly improved pasture conditions and partially replenished water catchments in parts of Juba, Bakool and Bay regions. There have been no reports of livestock disease outbreaks in southern Somalia since the start of the year.

Due to the delayed and poor start of the current Gu season rainfall and a likely below average Hagaa (July-September) rainfall, the 2021 Gu season cereal production is expected to be below average across most parts of southern Somalia.

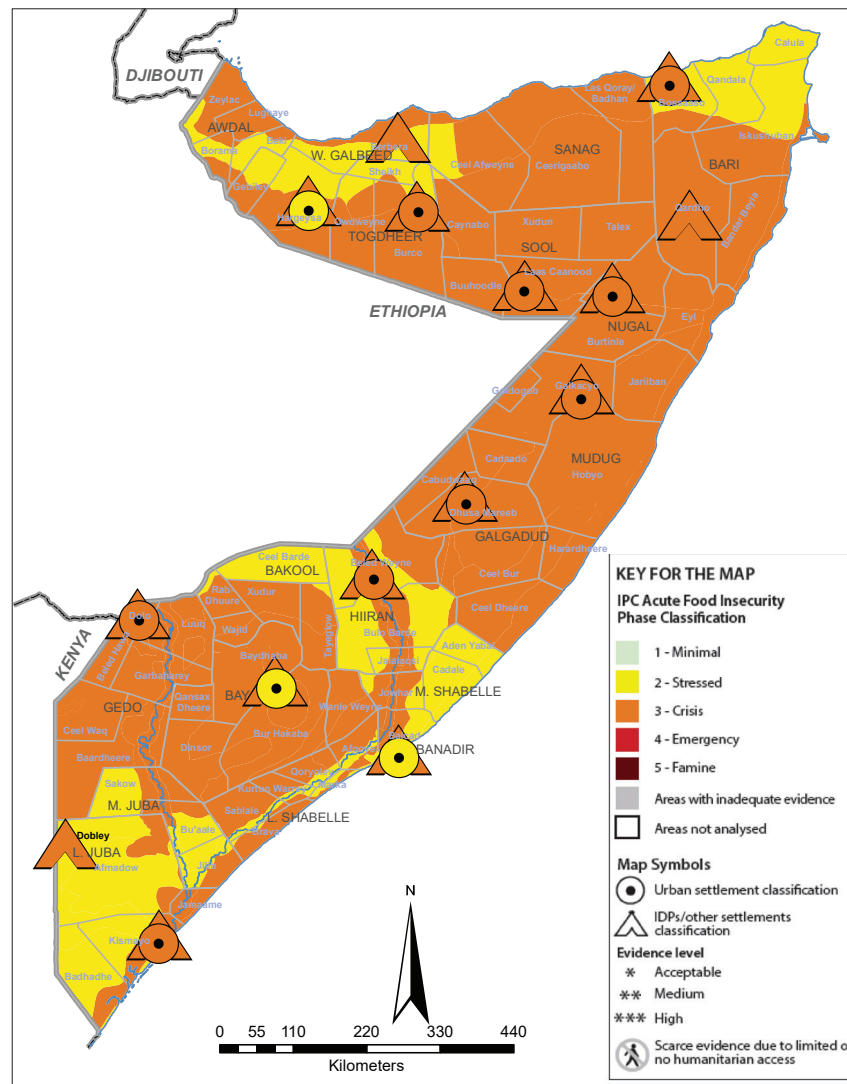
Due to below average 2020 Deyr main and off-season harvests, a harsh Jilaal dry period that evolved into drought conditions, a delayed and poor start of the 2021 Gu season rainfall, insecurity and reduced agricultural employment opportunities, the food security situation has continued to deteriorate in the South since the beginning of 2021. Accordingly, most livelihoods of southern Somalia are classified as Stressed (IPC Phase 2), while Bay-Bakool Low Potential Agropastoral, Southern Rainfed Agropastoral of Lower Juba, Riverine Pump Irrigation and Riverine Gravity Irrigation of Hiran, Middle Shabelle, Gedo and Lower Juba are classified as Crisis (IPC Phase 3) between April and June 2021. Further deterioration is anticipated due to the extended impact of the drought, the delayed and poor start of the 2021 Gu season rainfall and its adverse impact on crop production prospects and agricultural income, with most poor households expected to face moderate food consumption gaps in many rural livelihood zones. Crisis (IPC Phase 3) outcomes are expected between July and September 2021 in Cowpea Belt of Middle Shabelle, Southern Agropastoral, Sorghum High Potential Agropastoral, Bay-Bakool Low Potential Agropastoral, Southern Rainfed Agropastoral of Lower Juba, riverine areas of Hiran, Middle Shabelle, Gedo and Middle Juba, and Southern Inland Pastoral of Lower Shabelle, Bay and Gedo regions. The remaining pastoral livelihood zones are classified as Stressed (IPC Phase 2) from July to September.

Somalia Acute Food Insecurity Situation Overview

Map 6: Projected food security outcomes, April-June 2021



Map 7: Projected food security outcomes, July-September 2021



FSNAU Managed by Food and Agriculture Organization of the United Nations		FSNAU Technical Partners FEWS NET WFP World Food Programme World Health Organization UNICEF JRC UNHCR		FSNAU Resource Partners USAID UKaid European Union SWEDEN Schweizerische Eidgenossenschaft Confédération suisse Confederazione Svizzera Confederaziun svizra	
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