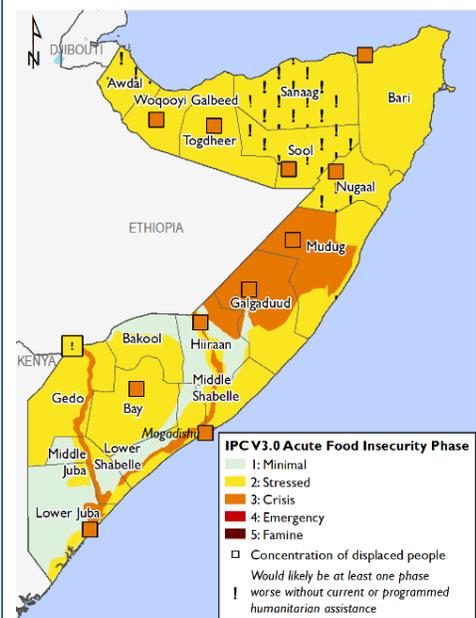


Below-average gu harvest, COVID-19, and deyr forecast drive Crisis (IPC Phase 3) through late 2020

KEY MESSAGES

- The economic impacts of COVID-19, an erratic *gu* rainfall season, and the desert locust upsurge are driving an increase in the food insecure population and the severity of food insecurity in Somalia. In June, Crisis (IPC Phase 3) or Stressed (IPC Phase 2) outcomes persist across the country. A significant scale-up of humanitarian food assistance in May reached 2.2 million people, reducing food consumption gaps at the household level and preventing worse area-level outcomes in parts of northern Somalia. However, nearly 20 percent of the total 2.7 million people in need of food assistance did not access it, including in riverine and rural areas of the South, where humanitarian access is low.
- The impact of the COVID-19 pandemic on the Somali economy is significant. Poor urban and IDP households, as well as pastoralists in northern Somalia, are likely to be most affected by an estimated 30-50 percent decline in annual external remittances, anticipated 25-35 percent decline in annual livestock exports, lower labor demand, and above-average imported staple food prices. In most IDP settlements and urban areas, at least 20 percent of the population still face food consumption gaps or are engaged in negative livelihoods coping strategies indicative of Crisis (IPC Phase 3) even after food assistance distributions. Additionally, Crisis (IPC Phase 3) outcomes are expected from June to September in parts of central Somalia, where livestock holdings are lowest, and in northeastern Somalia, where the economy is more dependent on livestock, seafood, and frankincense exports.
- The erratic distribution of rainfall during the April to June *gu* season has worsened *gu* cereal production prospects in south-central Somalia. Nationally, the *gu* harvest in July is now projected to be 30-40 percent below the long-term average. Severe floods in April/May inundated more than 54,000 hectares of farmland, equivalent to more than 20 percent of the 1995-2019 average planted area. In Beletweyne town, 115,000 people remain displaced by the floods. The early end of the *gu* rainfall season has also led to crop moisture stress in many areas. Although there are no reports of desert locust in the South, damage caused by crickets and other pests has been atypically high. Crop losses are highest in riverine areas and northern Bay Bakool Agropastoral livelihood zones, where Crisis (IPC Phase 3) outcomes are anticipated from June to September.
- During the July to September dry season, up to 3.5 million people are anticipated to be unable to meet their minimum food needs and in need of urgent humanitarian food assistance. Further, the NOAA/CPC NMME forecast predicts an increased likelihood of a below-average *deyr* rainfall season from October to December 2020. FEWS NET'S research shows the NMME forecast has a strong capability to predict below-average rainfall during the October to December rainfall season in eastern East Africa. Combined with the persistent threat of desert locust, the impact of below-average rains on crop and livestock production is expected to lead to widespread deterioration to Crisis (IPC Phase 3) in northern and central pastoral areas and southern agropastoral areas in the absence of sustained food assistance.
- While the 2021 *gu* rainfall season falls outside of the current projection period, preliminary climatological research suggests there is a possibility of a consecutive below-average rainfall season from March to May 2021. Past trends indicate that food security conditions can quickly deteriorate in Somalia in the event of two consecutive below-average seasons.

Current food security outcomes, June 2020



Source: FEWS NET and FSNAU

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

NATIONAL OVERVIEW

Current Situation

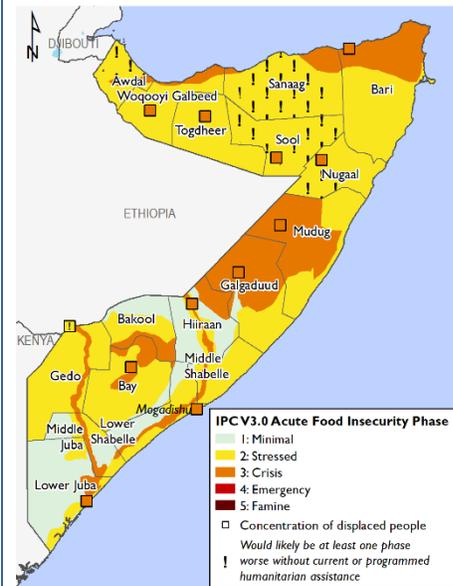
COVID-19: The COVID-19 pandemic presents direct and indirect impacts on food insecurity in Somalia. As of June 30, 2,904 cases of COVID-19 have been confirmed in Somalia. According to available information from OCHA in late June, the positive test rate is 43 percent, while the observed case fatality ratio is 3.1 percent. Due to low per capita testing, low access to health services, and low adherence to social distancing measures, the total case incidence is likely higher than known. However, daily case incidence reports of confirmed cases suggest cases are declining in the South and rising in north-central Somalia. There is also growing concern for the spread of COVID-19 within IDP settlements. While data on the direct impacts of COVID-19 on individuals who have contracted COVID-19 within Somalia are limited, health shocks are associated with increased difficulty earning income or engaging in livelihood activities. Further, the population’s vulnerability to the direct health impacts of COVID-19 is very high, based on existing high acute malnutrition prevalence and poor access to health services and WASH infrastructure.

The indirect effects of the pandemic on food security within Somalia are more visible, driven by the global economic downturn, supply chain disruptions in the Arabian Peninsula, and social distancing measures. International and local flight restrictions and port closures in Dubai disrupted import and export trade activities, while money vendors report steep declines in both external and internal remittances. Declines in business activities have affected the airline, construction, road transport, hospitality, petty trade, miraa/khat trade, and education and health services sectors. In the South, declines in business activity have affected labor demand. In Abudwaq and Kismayo, where wages have fallen most significantly, the daily labor wage fell to 30-40 percent below May 2019 and by 27-33 percent compared to the five-year average. In terms of regional cross-border trade, mandatory COVID-19 testing has led to significant delays in trade flows, according to anecdotal information from key informants. Cross-border livestock market closures in Kenya have also contributed to changing livestock export dynamics. The Garissa livestock market is still closed, though Dhagahley-Dhadhab/Garissa county and Dif-Wajir county livestock markets are operational. Overall, the impact of the pandemic on food security is most significant in urban areas, where poor urban and IDP households face declining daily labor wages, internal remittances, and social support. Pastoral households in the Northeast are also more affected due to higher dependence on exports of livestock, seafood, and frankincense.

Desert Locust upsurge: In June, reports from multiple sources, including government surveys and the FAO, confirm desert locust swarms, bands, and groups are present in Hawd Pastoral, Northern Inland Pastoral, East Golis Pastoral, Togdheer Agropastoral, Northwestern Agropastoral, and Guban Pastoral livelihood zones (Figure 1). No locusts have been reported in the South. While quantitative assessments of damage to pasture and crops are limited, key informants report damage is localized and limited so far, which is attributed to recent rainfall that regenerated vegetation and to a significant scale-up in control operations. The FAO reports that 10,245 hectares (ha) and 19,029 ha of land were treated in May and June, respectively, compared to a cumulative total of 1,812 ha from February to April. Despite the scale-up in control operations, however, desert locusts continue to breed and remain a high threat to livestock production in pastoral areas and crop production in agropastoral areas.

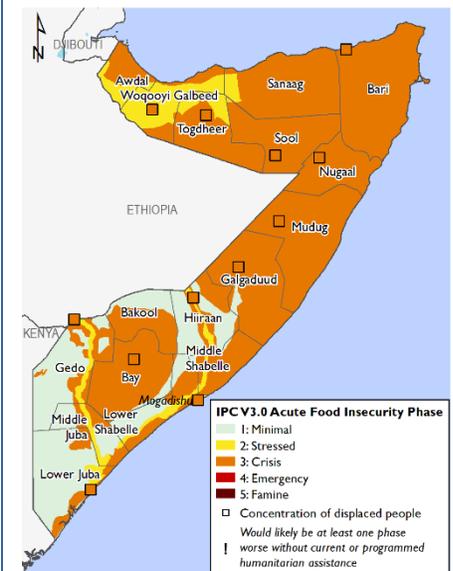
Seasonal performance and crop production: In south-central Somalia, an early onset of the April to June *gu* 2020 rainfall

Projected food security outcomes, June to October 2020



Source: FEWS NET and FSNAU

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET and FSNAU

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

season prompted farmers to engage in the timely planting of main season *gu* crops. Area planted broadly ranged from average to above average. However, *gu* rainfall was poorly distributed over time, characterized by severe floods in late April/early May, a dry spell in May, and an early end to the season. In many southern cropping zones, cumulative rainfall for the April to June season is less than 70 percent of average, according to satellite-derived rainfall data (Figure 2). In cropping zones in Gedo, Bakool, and Hiiraan, cumulative near-average to above-average rainfall is driven by surplus rainfall in April, which outpaced the rainfall deficits recorded in May and June.

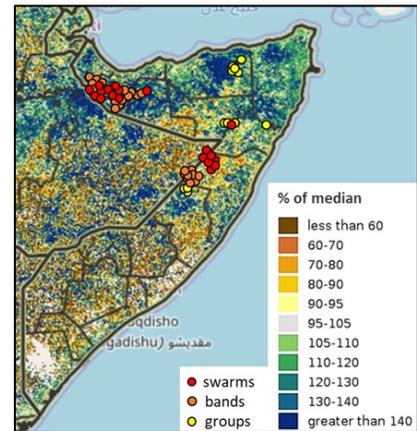
According to OCHA, the 2020 *gu* floods displaced 412,000 people, nearly 30 percent of whom were displaced from Beletweyne town in Hiiraan. In riverine areas, floods damaged irrigation infrastructure and inundated an estimated 54,000 ha of farmland in Hiiraan, Middle Shabelle, Middle Juba, Lower Juba, and Gedo, equivalent to roughly 21 percent of the 1995-2019 average planted area. Out of these totals, approximately 30,000 ha of planted off-season *deyr* and main season *gu* crops were destroyed, including maize, cowpea, sesame, and vegetables. The scale of floods prevented re-planting in May, but by June, the floodwaters are beginning to recede, which has allowed farmers to plant recessional crops gradually. In Hiiraan, poor households in flood-affected riverine areas have seed shortages and are seeking help from kin and friends.

Below-average rainfall in May and dry conditions in June have led to widespread crop moisture stress in most agropastoral areas, resulting in poor seed germination and crop wilting (Figure 3). Conditions are driest in parts of Lower and Middle Shabelle, where cumulative rainfall is less than 55 percent of normal in some areas. Southerly and southwesterly winds lowered the risk of desert locust infestation in Somalia, but heavy, early-season rains and subsequent dry conditions facilitated atypically high pest incidence, such as crickets, in riverine and agropastoral areas. In agropastoral areas of Bay and Bakool, for example, crickets infested sorghum crops at the seedling stage, forcing farmers to re-plant on a large scale. Additionally, ongoing conflict and insecurity in Lower Shabelle, Middle Juba, and Lower Juba caused some farmers to suspend farming activities altogether.

Due to multiple hazards, prospects for the main season *gu* harvest in June/July are below average (Table 1). Although assessments of crop damage are limited due to COVID-19 and insecurity, FSNAU and FEWS NET estimate that up to 45 percent of farmland in riverine areas was left uncultivated after the floods. Recessional cultivation is underway, but off-season crops will not be harvested until September or later. In agropastoral areas, current crop development progress is highly varied, due to the mixed timing of re-planting following earlier crop losses from floods and pests. Crop stages range from the vegetative stage in Bay, to establishment stages in Bakool, to maturation stages in parts of Lower Shabelle and Cowpea Belt Agropastoral livelihood zone. Crop production prospects are lowest in Southern Agropastoral livelihood zone of Gedo, where crop moisture stress has been most severe. In agropastoral areas adjacent to the coast, crop prospects will depend on the performance of the *hagaa* showers in July.

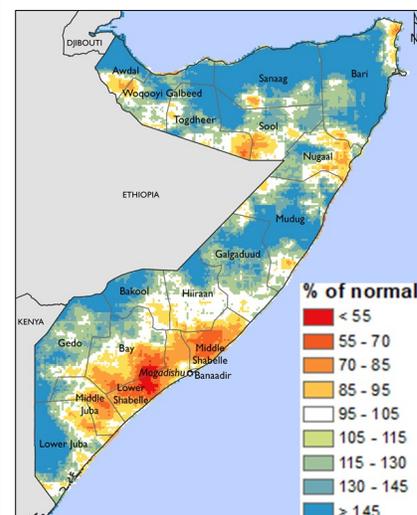
In Northwestern Agropastoral livelihood zone, farmers planted *gu* short-cycle maize planting at significantly below-normal levels due to a locally poor onset of the *gu* rains and high presence of desert locusts. However, farmers planted long-cycle sorghum on time in late May after rainfall improved, and crops are in good condition. In Togdheer Agropastoral livelihood zone, farmers planted 60-70 percent below normal levels as they had limited capacity to afford the cost of

Figure 1. Desert locust situation and Normalized Difference Vegetation Index as a percent of the 2003-2017 median, June 21-30, 2020



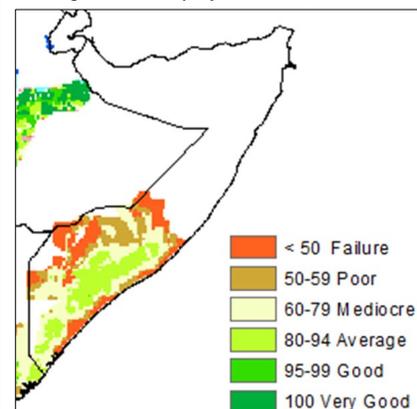
Source: FAO Desert Locust Watch; FEWS NET

Figure 2. CHIRPS prelim rainfall as a percent of the 1981-2010 average, April 1-June 25, 2020



Source: FEWS NET

Figure 3. Water Requirement Satisfaction Index, *gu* cereal crops, June 21-30, 2020



Source: FEWS NET

tractor tillage and are wary of desert locust damage to crops. Additionally, a long dry spell in late May/early June led to poor crop establishment, and desert locust reportedly caused localized damage in Oodweyne district of Togdheer region. However, grass fodder production is average to good, increasing access to income from labor and fodder sales.

Seasonal performance and livestock production: In pastoral areas across the country, rainfall was similarly erratic with heavy rainfall in April and light to moderate rainfall in May. In April, torrential rains in the Golis mountains and the hinterland led to significant flooding that caused fatalities, killed livestock, and damaged infrastructure and livelihood and commercial assets. In contrast from cropping zones, however, cumulative rainfall in north-central Somalia was largely favorable for vegetation regeneration. As a result, mixed pasture availability is observed across the country, based on satellite-derived data (Figure 3). Although desert locust swarms have caused pasture damage in north-central areas, rainfall has helped to regenerate pasture. As a result, pasture availability is above-normal in northern and much of central Somalia. Increasing levels of infestation with localized damage to pasture is reported in Northern Inland Pastoral, East Golis Pastoral, and Hawd Pastoral regions. In central Somalia, a considerable presence of desert locust is reported in Hawd Pastoral and Addun Pastoral livelihood zones of Adaado, Galkayo, and Hobyo districts.

Due to the heavy April rains, water availability and access are generally good, with free water available through natural sources. As a result, the price of a 20-liter jerry can is 30 percent below the five-year average in Northeast. However, the early cessation of the *gu* rains drove an increase in the price of water in May in several areas. In markets in central Somalia and in the Juba and Shabelle regions, the price of a jerry can is up to 45 percent above average. The highest price increase is observed in the Northwest, where prices are 40, 25, and 81 percent above April 2020, May 2019, and the five-year average.

Medium to high goat births occurred during the 2020 *gu*, driving modest growth in herd sizes among poor households in some livelihood zones. Low cattle and camel calving occurred in most areas, since medium to high conceptions already occurred in the 2019 *deyr* and the gestation period is 9-12 months. However, pastoral livelihoods in the Northwest (excluding Guban Pastoral), Hawd Pastoral of Hiiraan, and Southern Inland Pastoral livelihood zones reported medium camel births, while agropastoral households in Bay and Bakool reported low to medium cattle births. Despite some growth, herd sizes remain below baseline levels in most north-central pastoral livelihood zones. With recent livestock births, most poor households now have access to goat milk for consumption. In northern and central areas where the number of livestock giving birth is below baseline levels due to lower herd sizes, total milk availability improved this season but remains below average. In most southern regions, milk access is near normal. Medium rates of livestock conception took place between April and June in most areas, driven by the favorable *gu* rains and vegetation and seasonal herd dynamics.

Table 1. Factors affecting crop production prospects during the April to June *gu* 2020 season in southern Somalia

Livelihood zone	Factors	Impacts	Prospects
Cowpea Belt Agropastoral (SO10)	<ul style="list-style-type: none"> • Early cessation of <i>gu</i> rains • Atypically high pest infestation 	<ul style="list-style-type: none"> • Crop moisture stress • Early start of <i>hagaa</i> winds 	Below average
Southern Agropastoral (SO12)	<ul style="list-style-type: none"> • Early cessation of <i>gu</i> rains 	<ul style="list-style-type: none"> • Crop moisture stress • Early start of <i>hagaa</i> winds 	Significantly below average
Riverine Pump Irrigation (SO13)	<ul style="list-style-type: none"> • Floods in late April/May • Damage to irrigation infrastructure • Floodwaters receding in June 	<ul style="list-style-type: none"> • Crop losses include up to 16,000 ha in Hiiraan and 650 ha in Gedo • 30-40% of farmland waterlogged or fallow during main season • Gradual start of off-season planting 	Significantly below main season; below-average off-season
Riverine Gravity Irrigation (SO14)	<ul style="list-style-type: none"> • Floods in late April/May • Early cessation of <i>gu</i> rains • Insecurity • Atypically high pest infestation • Floodwaters receding in June 	<ul style="list-style-type: none"> • Crop losses include up to 11,000 ha in Shabelles and 20,000 ha in Jubas • 20-45% of farmland waterlogged or fallow during main season • Gradual start of off-season planting 	Significantly below main season; below-average off-season
Sorghum High Potential (SO15)	<ul style="list-style-type: none"> • Atypically high pest infestation • Early cessation of <i>gu</i> rains 	<ul style="list-style-type: none"> • Failed seed germination • Crop moisture stress 	Below average
Bay Bakool Low Potential (SO16)	<ul style="list-style-type: none"> • Atypically high pest infestation • Early cessation of <i>gu</i> rains 	<ul style="list-style-type: none"> • Failed seed germination • Crop moisture stress 	Below average
Southern Rainfed Agropastoral (SO17)	<ul style="list-style-type: none"> • Below-average <i>gu</i> and <i>hagaa</i> rains • Insecurity • Atypically high pest infestation 	<ul style="list-style-type: none"> • Some farmers suspended cultivation due to insecurity • Crop moisture stress 	Below average

Macroeconomic conditions: The economic impacts of COVID-19 on the global and Somali economy are leading to a decline in foreign exchange earnings from external remittances and exports of livestock and other products. External remittance flows from the Somali diaspora constitute 1.4-2 billion USD every year and contribute 23-32 percent of Gross Domestic Product, according to the World Bank. However, after the onset of COVID-19, money vendors report that the volume of cash transactions declined approximately 30-40 percent from March to May. Usually, remittances reach an estimated 40 percent of the population directly. Better-off households typically receive remittances, but redistribute them as social support, providing a lifeline for many poor urban, IDP, and pastoral households who face difficulty meeting their minimum food needs. Based on available baseline information, remittances are a more important source of income in rural areas of north-central Somalia than in rural areas of the south. Internal remittances have also been affected due to the impact of social distancing measures on business activity, leading to a decline in social support from middle and better-off households.

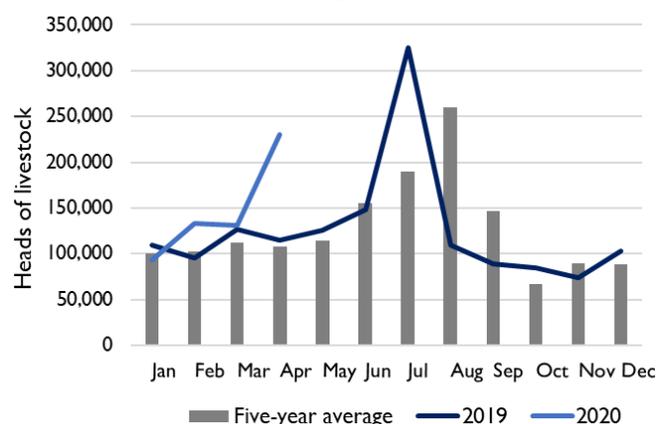
The effective cancellation of the *Hajj* has significant implications for the Somali economy. Somali exports are dominated by livestock export to Arabian countries; typically, 55-70 percent of annual livestock exports occur during the *Ramadhan* and *Hajj* season, peaking in August. At first, the onset of COVID-19 had little effect on livestock exports because of an increase in demand from Egypt, Pakistan, and Oman leading up to *Ramadhan* and because Saudi Arabia lifted their ban on Somali livestock exports in April. Livestock exports were better than forecast, with exports from Bossaso port rising 40 percent above exports during the same period of 2019 in March and April (Figure 4). In Berbera, exports increased by 14 percent. However, the cancellation of the *Hajj* is reportedly driving a decline in livestock exports in June. The loss of export income among better-off households who dominate the export trade affects poor households by reducing labor demand down the livestock value chain, including those who are involved in earn income from animal feeding, watering, holding, and marking. Other sectors affected by the COVID-19 pandemic include seafood and frankincense, which are important sources of income in East Golis and Coastal *Deeh* Pastoral and Fishing livelihood zones, due to collapsing demand in Arabian markets.

The decline in foreign exchange earnings has not notably affected the exchange rate of the Somali Shilling (SOS) against the USD in most SOS-using markets. In Mogadishu’s Bakaara market, for example, the USD traded at around 25,600 SOS in May, which is comparable to the March rate of SOS 25,360. In the Northeast, however, the issue of a new SOS note printed by Puntland authorities and rejected by other regions has continued to drive depreciation in the value of SOS locally since March 2019. The reduction in the dollar supply due to reduced trade activities accelerated the depreciation of the SOS locally, which lost about five percent of its value from March to May. The value of the Somaliland Shilling (SLS) is stable.

Markets and trade: The onset of the COVID-19 pandemic led to the closure of the Dubai port, which led to a reduction in imports of staple food items in Somalia. Imports of rice, wheat flour, and pasta declined by 16 percent from March to May. The decline in supply, combined with panic buying at the onset of the pandemic in March and a seasonal increase in demand during *Ramadan*, drove retail prices 8-20 percent above 2019 and roughly up to 40 percent above the five-year average. The steepest price increases occurred in Hargeysa and the Northeast. In the Northeast, depreciation of the SOS exacerbated the impact of supply and demand factors on the retail price. Northern and central Somalia depend on imported staple food items, while domestic supplies are more important in the South.

Locally and regionally produced cereal prices exhibit mixed patterns from April to May in agropastoral markets. The maize supply is seasonally low, while the *gu* floods closed roads, increased transportation costs, and wreaked havoc on the supply outlook from maize-producing riverine areas. As a result, the retail price of maize exhibited steep price increases of 20-30 percent compared to 2019, though prices are comparable to the five-year average. The sorghum supply is more stable, driven by better availability and release of old stocks from the preceding *deyr* harvest in agropastoral areas. The retail price of sorghum generally ranges from near the 2019 average to below the five-year average. In central and northern Somalia, maize and sorghum prices are seasonally stable, with market supply sourced from the 2019 *karan* harvest and imports from Ethiopia. In northwestern agropastoral markets, sorghum prices have declined 10-15 percent below 2019 and 7-10 percent below the five-year average.

Figure 4. Livestock exports from Bossasso in 2019 and 2020 compared to the 2015-2019 average



Source: data from Bossaso Port Authority

In most agropastoral and riverine areas in southern Somalia, labor demand and wage rates have atypically declined due to the floods and the early end of the *gu* rains. The declining wage combined with high maize prices is driving a decline in the labor-to-cereal terms of trade, such as in Beletweyne, Qorioley, and Bu’aaale markets, a key metric for poor households’ purchasing power (Figure 5). On average, the labor-to-cereal terms of trade (ToT) across major reference markets were 20-50 percent lower in May compared to May 2019 and 10-30 percent below the five-year average. Conflict and insecurity also affected labor demand and supply in the south. In Jamame and Jilib, for example, many farmers suspended farming due to the fear of conflict and sought labor in main towns in the region. In May, the average daily labor wage in Middle Juba dropped by 15 percent from May to April and by 9 percent compared to May 2019. In contrast, the labor wage in northwestern agropastoral areas remains high. Combined with below-average cereal prices, the labor-to-cereals ToT remain favorable.

In May, livestock prices ranged from slightly to modestly higher than 2019 and the five-year average. Livestock prices have been atypically high in Somalia since 2018 due to low local supply of livestock after the 2016/2017 drought. Further, prices in some markets have been boosted by improved livestock body conditions after two consecutive seasons of good rainfall in 2019/2020. The price of a local quality goat ranged from six to 32 percent above the five-year average in most major reference markets and ranged from near- to nine percent above May 2019. An exception is in the Northwest, where a relative increase in the livestock supply compared to 2019 pushed prices down by 10 percent on average compared to May 2019.

Despite good livestock prices, the high price of imported rice and local maize is diminishing the purchasing power of poor pastoralists (Figure 6). Typically, a household of six-seven people needs to purchase 90 kg of rice or cereal monthly. On average, the sale of a local quality goat in May could purchase 65-76 kg of cereal across key reference markets in central, northwestern, and northeastern Somalia, which is 7-20 percent May 2019. The fall is steepest in the Northwest due to the declining goat price, at 20 percent below the five-year average. In northeastern and central Somalia, the TOT remain near- to 10 percent above the five-year average, but the decline is significant for pastoralists who have below-normal saleable livestock holdings. In the South, where poor pastoralists’ livestock holdings are near- to above-baseline, a sale of local quality goat can purchase an average of 66 kg in the Juba regions, 96 kg in the Sorghum Belt (Bay, Bakool, Gedo, and Hiiraan), and 169 kg in the Shabelle regions. This represents a decline of 15 percent compared to 2019 and 37 percent compared to the five-year average in the Juba and Shabelle regions. In the Sorghum Belt, the average terms of trade remain near average.

Conflict and displacement: Protracted conflict across most of southern and central Somalia continues to periodically cause loss of life and assets, suspend cropping activities, disrupt trade and population movements, and impede access to humanitarian assistance. According to data collected by ACLED, the number of conflict events in Somalia in the first six months of 2020 is similar to the number of conflict events recorded in 2019 (+2 percent) and similar to conflict recorded over the preceding five years (-1 percent). Conflict and weather hazards continue to be the primary drivers of population displacement across Somalia in 2020. According to UNCHR, approximately 2.6 million people are internally displaced in a protracted situation in Somalia as of April. In terms of new or temporary displacement, the scale of displacement due to the 2020 *gu* floods (412,000) is comparable to the number of people displaced during the 2019 *deyr* floods (363,000 people). Of the

Figure 5. Labor to cereals terms of trade (ToT) in select key reference markets, January 2015 – May 2020

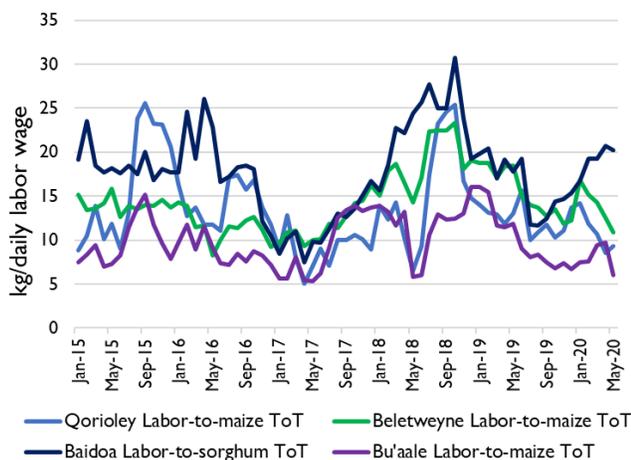
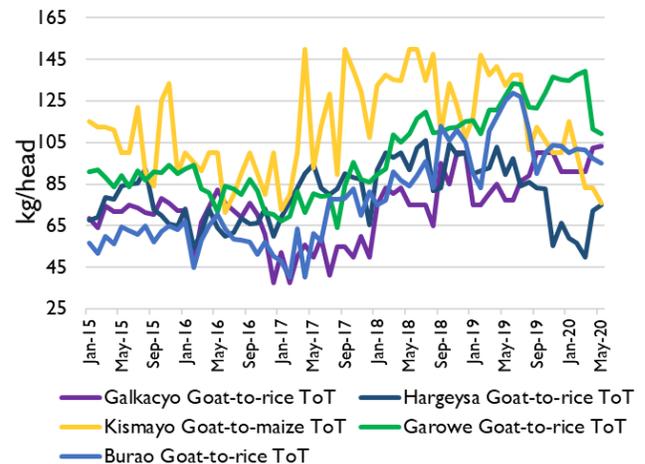


Figure 6. Livestock to cereals terms of trade (ToT) in select key reference markets, January 2015 – May 2020



Source: data from FSNAU

240,000 people displaced by the *gu* floods in Beletweyne town and surrounding riverine villages in Hiiraan, 181,000 that sheltered in the outskirts of Beletweyne town have since returned to their homes. Additionally, conflict-related displacement from January to May 2020 (131,144 people) rose by 60 percent compared to the same period of 2019.

Humanitarian food assistance: According to the Somalia Food Security Cluster (FSC), humanitarian food assistance increased from 0.7 million people per month from January to March 2020 to 1.6 million in April and 2.3 million in May. Cash and in-kind values scaled up to more than 50 percent of monthly kilocalorie needs, delivered in two-month distribution cycles in order to limit the risk of spreading COVID-19 among in-kind recipients. Additionally, the FSC confirmed that a rural safety net program of the Federal Government of Somalia, “Baxnana,” continued to reach 200,000 chronically poor rural households (1.2 million people) across 21 districts, providing predictable cash transfers of 20 USD per month in value since 2018. Similarly, an urban safety net program in Mogadishu is continuing to reach 20,833 poor urban and protracted IDP households (125,000 people) with 35 USD per month (equivalent to 50 percent of the normal Minimum Expenditure Basket).

Current Outcomes

Pastoral areas: In June, food security outcomes are somewhat better than previously projected in northern Somalia due to a scale-up of humanitarian food assistance and lower-than-anticipated damage to rangeland from desert locusts. These interventions helped to prevent unsustainable livestock sales during the *gu* and atypical migration in search of rangeland resources. However, while some herd growth has occurred, many poor pastoralists are still unable to afford all basic non-food needs from the sale of livestock and livestock products. Households routinely allocate a high portion of income from livestock sales to debt repayment, accumulated during recurrent droughts. Additionally, the impacts of COVID-19 on the Somali economy is weakening social support and leading to an increase in the livestock supply after the cancellation of the *Hajj*. Based on below-normal livestock holdings combined with eroding livestock-to-rice terms of trade, many poor pastoral households have difficulty affording both their essential food and non-food needs. In central pastoral livelihood zones, where livestock holdings are lowest, most poor households are in Crisis (IPC Phase 3). Pastoralists in central livelihood zones also face the highest risk of damage from growing desert locust populations and have low access to humanitarian assistance. In the North, including parts of Guban, East Golis, Hawd, and Northern Inland Pastoral livelihood zones, significant humanitarian assistance is leading to Stressed! (IPC Phase 2!). In other northern pastoral areas and Southern Inland Pastoral livelihood zone of Gedo, livestock holdings are relatively better and Stressed (IPC Phase 2) outcomes are likely. Conversely, poor households in most southern pastoral areas are experiencing Minimal (IPC Phase 1) acute food insecurity due to normal to above-normal livestock holdings, sufficient milk for consumption and sales, and high terms of trade for the sale of one goat.

Agropastoral and riverine areas: In agropastoral areas of Bakool, Bay, Hiiraan, Lower Shabelle, and Lower Juba, Stressed (IPC Phase 2) outcomes exist. Poor households are earning below-normal levels of income through agricultural labor due to reduced weeding activities because of the early end of the *gu* rains, making it more difficult to meet their non-food needs despite the affordable availability of sorghum. Additionally, poor households have few livestock with which to earn income from milk or sales. As a result, most are reducing non-food expenses in order to afford staple food purchases. In riverine areas of Hiiraan, Middle Shabelle, Lower Juba, and Middle Juba, where flooding caused significant crop damage, limited agricultural labor, displaced households, and increased water-borne disease incidence, poor households are in Crisis (IPC Phase 3). Most face food consumption gaps and spend much of their time working on other farms to earn some income to purchase food. In northwestern agropastoral areas, Stressed (IPC Phase 2) outcomes exist. Although poor households’ food stocks are below normal due to a minimal short-cycle maize harvest, they can meet their food needs through agricultural labor income from *karan* and fodder crop production, social support, and food assistance.

IDP settlements and urban areas: According to the results of the 2019 post-*deyr* IDP household survey, 18 percent of the total IDP population of 2.6 million were in Crisis (IPC Phase 3) or Emergency (IPC Phase 4). In urban areas, nearly 1.7 million people were also in Crisis (IPC Phase 3) or Emergency (IPC Phase 4). More than 75 percent of urban households in Crisis (IPC Phase 3) were located in Burao, Hargeisa, Kismayo, and Mogadishu. The magnitude of the IDP and urban population in Crisis (IPC Phase 3) or Emergency (IPC Phase 4) has most likely risen. In Beletweyne town of Hiiraan, consecutive seasons of large-scale displacement due to floods led to long periods in which they could not participate in productive livelihood activities, and the loss of productive assets has eroded their coping capacity. More broadly, the COVID-19 pandemic and erratic *gu* planting season have led to significant reductions in both agricultural and casual labor income among poor urban and IDP households. Households who rely on casual urban labor and small-scale self-employment – tea kiosk vendors and grocers – or remittances and gifts from kin have been particularly affected. Since food purchases typically comprise 75 percent of their total expenditures, poor urban households are especially vulnerable to a loss in income or purchasing power. Further, many IDPs have weak social and family/clan connections and struggle to access social support, which would typically offer vital forms of assistance in times of need. Even in the presence of sustained humanitarian food assistance, most IDP and poor

urban households are facing food consumption gaps indicative of Crisis (IPC Phase 3).

Assumptions

The most likely scenario from **June 2020 to January 2021** is based on the following national-level assumptions:

- Based on available information from the Ministry of Health and local and international health experts, including the WHO, the number of COVID-19 cases is likely to rise in the near term due to both the spread of the virus and increased testing. Available models from the London School of Hygiene & Tropical Medicine indicate daily case incidence may peak between July and August, though new cases are expected through January.
- Social distancing measures are expected to remain in place in the near- to medium term. However, international and local flight restrictions are expected to be lifted in July and August, respectively, based on government announcements.
- According to the NOAA/CPC NMME and ECMWF C3S probabilistic forecasts, the June to September *karan* rains in northwestern Somalia are forecast to be average. The July to August *hagaa* coastal showers in Lower and Middle Shabelle and Lower and Middle Juba are most likely to be below average.
- In the rest of Somalia, the June to September *hagaa* dry season will likely be drier-than-normal in south-central Somalia based on the early end of the *gu* rains and the above-average temperature forecast. In the North, the dry season is likely to be relatively mild given recent above-average to average *gu* rains, despite the above-average temperature forecast.
- According to the NOAA/CPC NMME and ECMWF C3S probabilistic forecasts, the October to December 2020 *deyr* rains are most likely to be below average. This assumption is driven by the slightly elevated likelihood of weak La Niña and negative IOD conditions and based on Indo-Pacific sea surface temperature anomalies. FEWS NET'S research shows the NMME forecast has a strong capability to predict below-average rainfall during the October to December rainfall season in eastern East Africa, specifically. However, uncertainty exists due to the long-term nature of this forecast.
- The December to January *xays* rains in Guban Pastoral livelihood zone in northwestern Somalia are likely to be average.
- Based on current climatic and ecological conditions and the short-term wind forecast, FAO's Desert Locust Watch and ICPAC project a low risk of desert locust invasion in southern Somalia and a high likelihood that desert locusts will accumulate in north-central Somalia. Based on ongoing breeding, wind climatology, and limited control operations within Yemen, the shift in the monsoon winds in October/November will likely lead to a new invasion of desert locusts from Yemen to Somalia by the October to December 2020 rainfall season. [Sixty percent](#) of donor funding has been committed for the Somalia desert locust response. Control operations are planned, funded, and likely through September and will be limited to northern and western-central Somalia due to insecurity.
- The national, main season *gu* cereal harvest in June/July is projected to be 30-40 percent below average, based on *gu* rainfall performance, reported crop losses, pest incidence, and current cropping conditions. In riverine livelihood zones, main season *gu* crop failure is anticipated. Cash crop cultivation is also expected to be below normal.
- The off-season *gu* harvest in riverine livelihood zones in September/October is also expected to be below-average. Although 20-45 percent of farmland was still flooded in June, recessionary cultivation will likely increase through September as water recedes and due to the forecast of below-average October to December *deyr* rainfall.
- The national, main season *deyr* harvest in January is expected to be below-average based on the below-average *deyr* rainfall forecast. However, off-season *deyr* production prospects are expected to benefit from a lower likelihood of river flooding, which will likely permit recessionary cropping activities through December.
- In south-central agropastoral areas, agricultural labor demand and the agricultural labor wage are expected to remain below normal through July due to below-average cash crop and *gu* cereal harvests. Although labor demand for land preparation and planting for the *deyr* season in September/October is likely to be constant, labor demand for weeding and harvesting is likely to be low based on the below-average *deyr* rainfall forecast.
- In all riverine areas, agricultural labor demand is expected to be below normal through July/August. In Riverine Gravity Irrigation livelihood zone, prospects for recessionary cultivation during the *hagaa* and *deyr* seasons are anticipated to lead to normal agricultural labor demand from September to January, especially in the Jubas and Middle Shabelle.
- In northwestern agropastoral areas, the *gu* maize harvest is most likely to be below average due to reduced area planted and damage from desert locust. The *karan* sorghum harvest in November will likely be near average, based on the

average rainfall forecast and desert locust control operations. Labor demand will likely be normal through November.

- Rangeland and water resources are projected to decline during the July to September dry *hagaa* season, except in the Northwest, where *karan* rainfall is expected to continue to regenerate vegetation despite potential desert locust damage. Based on the below-average October to December *deyr* rainfall forecast, rangeland and water resources are projected to exhibit mixed to below-normal anomalies through January.
- Based on current livestock conditions and water and dry pasture availability, livestock body conditions and productivity are expected to remain normal with seasonal deterioration during the dry season through September. Based on past trends, it is expected that below-average rainfall will be sufficient to generate enough pasture to support livestock health during the *deyr* rains season, though atypical migration patterns in search of green pasture and water are likely.
- Low to medium camel calving and medium cattle calving rates are expected in June/July in north-central Somalia and in January in the south based on camel and cattle conception rates during the 2019 *deyr*. Based on anticipated medium to high conceptions in the 2020 *gu* and *hagaa*, medium to high goat and sheep birth rates are expected in the *deyr*.
- Based on livestock births, milk availability is likely to increase seasonally through January in both pastoral and agropastoral areas. However, milk volumes per animal will likely be lower than usual, given below-average rainfall. In riverine areas, milk availability decreases as livestock are migrated away to wet-season grazing areas.
- According to the [World Bank](#), Somalia's economic growth outlook has been revised from 3.2 percent to 2.3 percent, driven by falling remittances, lower exports, and a potential slowdown in private investment due to the economic impact of COVID-19. Based on current trends and projections by the Federal Government of Somalia, annual remittances in 2020 are expected to be 30-50 percent below normal. Due to the cancellation of the *Hajj* pilgrimage, annual livestock exports in 2020 are expected to be nearly 25-35 percent below the five-year average. Projections remain highly uncertain.
- Based on lower remittances and exports, declining foreign exchange earnings, and increased demand for USD among traders, the Somali Shilling is likely to deteriorate somewhat, which will place pressure on the price of imported rice, oil, and sugar. Given a 7-13 percent increase in staple imported food prices from March to May, imported staple food prices is likely to remain above average in most of Somalia. In the Northwest, the Somaliland Shilling (SLS) is likely to be stable with slight fluctuations in the rates of SLS 8,000-8,500 per USD due to monetary interventions by the Somaliland authorities. Given the re-opening of Dubai ports and stable SLS, imported food prices are likely to return to normal.
- Based on current market supply and the below-average *gu* 2020 crop production season, the supply of sorghum and maize is expected to be tight through January. Nevertheless, maize from the *gu* harvest is expected to increase the maize supply, driving a decline in maize prices in agropastoral markets. Cross-border sorghum and maize imports from eastern Ethiopia are expected to continue to supplement food availability in central and northern markets. Sorghum and maize prices will likely range from near- to above the five-year average through January across most of Somalia.
- Although goat prices are currently above-average in most markets, the cancellation of the *Hajj* is anticipated to result in excess supply of export-quality livestock on the local market. This is likely to drive livestock prices downward through January. Prices in 2020/21 are expected to be below 2019/20 but remain above the five-year average in most markets.
- Household purchasing power measured by the goats-to-cereal terms of trade (ToT) is expected to be slightly below average to near average, driven by favorable but declining livestock prices, slight depreciation of SOS, and stable to rising rice prices. Labor-to-cereal ToT are expected to decline; while the terms of trade will likely remain near the five-year average, the average is driven by volatility between below- and above-average rainfall seasons. The labor-to-cereal ToT will peak in July-September after all market feeder roads re-open, trade flows normalize, and the *gu* harvest arrives.
- The Somalia Food Security Cluster plans to reach an average of 1.6 million beneficiaries monthly with cash assistance through September, based on receipt of over 80 percent of the total planned budget. Humanitarian assistance is expected to continue in urban and IDP settlements in areas currently controlled by the Federal Government of Somalia (FGS) supported by AMISOM, including most regional and district capitals in southern and central regions. Access to in-kind food assistance will likely be reduced due to sustained insecurity in rural south-central regions.
- Conflict between insurgents and the FGS – supported by AMISOM and other forces – and conflict between clans over the control of land and resource management is expected to continue to periodically restrict humanitarian access, cause loss of life and assets, cause displacement, and disrupt trade and population movements. Widening disagreement between the Somali federal authorities and regional states could further result in a failure in the provision of security services. Conflict is most likely to affect Bakool, Bay, Galgaduud, Gedo, Hiiraan, the Jubas, and the Shabelles regions.

- Based on historical trends, anticipated declines in food and milk consumption, and higher water-borne disease incidence after recent *gu* floods, the prevalence of global acute malnutrition (GAM) is expected to be higher than the same period of last year in urban areas and IDP settlements, riverine areas, pastoral areas of north-central Somalia, and in Bay Bakool Agropastoral livelihood zone. Among the urban and IDP population, it is possible that an increase in GAM could be driven by either the direct health impacts of COVID-19 or by household decisions to avoid seeking nutrition or health services out of fear of contracting COVID-19. Although the known number of COVID-19 cases is low, the high positive test rate and anecdotal evidence suggest cases are likely higher. GAM prevalence, measured by weight-for-height z-score (WHZ), is likely to deteriorate within 'Serious' (GAM(WHZ) 10.0-14.9 percent) levels or to Critical (GAM(WHZ) 15.0-29.9 levels).

Most Likely Food Security Outcomes

Pastoral areas: From June to September, Stressed (IPC Phase 2) outcomes will be widespread. Crisis (IPC Phase 3) remains most likely in **Addun Pastoral and Hawd Pastoral livelihood zones of central Somalia**, where poor households hold considerable debt and cannot finance their minimum food purchases without depleting the size of their herd. In parts of **Guban Pastoral, East Golis Pastoral, and Northern Inland Pastoral of Northwest livelihood zones**, below-normal income from low livestock holdings and low seafood and frankincense exports will drive Crisis (IPC Phase 3) outcomes; however, planned food assistance will likely sustain Stressed! (IPC Phase 2!) outcomes in some districts. Most poor pastoral households will rely on livestock sales, milk production, and sales of charcoal and firewood as their primary food and income sources. Based on good pasture and water availability as of June, and due to medium to high sheep/goat births during the *gu*, dry pasture availability is most likely to sustain relatively normal livestock productivity and value during the dry season. In north-central Somalia, however, livestock holdings will remain below normal to varying degrees, resulting in fewer saleable livestock and lower milk availability. Further, poor households in north-central Somalia typically depend on social support as a supplementary source of income or food, which is expected to be low through late 2020. Some households may also incur expenditures on migration to alternative dry-season grazing areas due to degradation of pasture by desert locusts. However, this is not expected to be large scale based on planned control operations and declining vegetation greenness that will reduce the locust population. As a result, most poor pastoral households will face difficulty earning enough income to purchase their minimum food and non-food needs despite anticipated slightly below to near-average goat-to-cereals terms of trade.

From October to January, below-average *deyr* rainfall, below-normal levels of social support, and declining goat-to-cereals terms of trade are most likely to drive deterioration to Crisis (IPC Phase 3) in most of north-central Somalia. On the one hand, medium to high sheep/goat births and some camel calving in central pastoral livelihood zones are anticipated, offsetting livestock sales and debt repayments that occur during this period and offering a seasonal increase in milk availability. Below-average rainfall will likely at least partially replenish rangeland and water availability in the short-term. On the other hand, below-average rainfall is associated with atypical migration patterns, which could be amplified in north-central Somalia by a new wave of desert locusts entering from Yemen. In the absence of planned and likely food assistance, which has played a critical role in preventing worse outcomes on the area level or on the household level, households will be more likely to engage in unsustainable livestock sales to purchase food or will face food consumption gaps. In contrast, most poor households in **Southern Inland Pastoral livelihood zone** and **Juba Pastoral livelihood zone** have near or above-baseline livestock holdings. They will likely continue to meet their minimum food and non-food needs through livestock sales and milk production, despite periodic disruptions to market access by conflict. Minimal (IPC Phase 1) outcomes will likely be sustained.

Agropastoral and riverine areas: From June to September, the below-average, main season *gu* harvest in July is expected to drive Stressed (IPC Phase 2) or Crisis (IPC Phase 3) outcomes. In most southern agropastoral livelihood zones, Stressed (IPC Phase 2) outcomes are most likely. The *gu* harvest will provide several months of food stocks along with some income from harvesting labor at below-normal levels. Households will also benefit from seasonal milk availability following livestock births in the *gu*. However, poor households will earn below-normal income from harvesting labor and crop sales, and will likely receive below-normal *zakat* in July due to economic hardship among middle and better-off households. As a result, most will face difficulty purchasing their non-food needs without engaging in stressed consumption strategies or purchasing food on credit. Crisis (IPC Phase 3) outcomes are expected in northern **Bay Bakool Low Potential Agropastoral livelihood zone**, where food and income sources are poorly diversified. Households will likely have only one month of food stocks from the *gu* harvest after debt repayment. Food security outcomes will be most severe in **Riverine Gravity Irrigation and Riverine Pump Irrigation livelihood zones**, where the main *gu* harvest is marginal. Crisis (IPC Phase 3) outcomes are expected, and some households may be in Emergency (IPC Phase 4). However, as floodwaters continue to recede, the increase in demand for recessionary cultivation labor and peak availability of wild foods will most likely provide enough income and food to prevent more severe Emergency (IPC Phase 4) outcomes on the area level. In **Northwestern Agropastoral and Togdheer Agropastoral livelihood zones**, where the *gu* harvest is only expected to provide 1-2 months of food stocks but livestock holdings are higher,

households will continue to earn labor income during the *karan* season or income from fodder production. Stressed (IPC Phase 2) outcomes are most likely.

From October to January, most agropastoral livelihood zones are most likely to deteriorate to Crisis (IPC Phase 3) during the agricultural lean season. Given that poor households will have already depleted their own-produced stocks, they will be heavily reliant on the market to buy their food. However, due to tight regional supply and declining labor demand and wages during the below-average *deyr* rainfall season, the declining labor-to-cereal terms of trade will limit both their level of income and their purchasing power. Most poor households are expected to experience food consumption gaps indicative of Crisis (IPC Phase 3) in **southern agropastoral livelihood zones** and in **Togdheer Agropastoral livelihood zone**. In **Bay-Bakool Low Potential Agropastoral livelihood zone**, where households are highly vulnerable to below-normal labor income, an increasing proportion of poor households will likely deteriorate to Emergency (IPC Phase 4). Overall, food availability and access are anticipated to only somewhat improve with the *deyr* harvest in January, due to below-average *deyr* production. In contrast, **riverine livelihood zones** will most likely improve to Stressed (IPC Phase 2), due to off-season harvests from September to December. Meanwhile, **Northwestern Agropastoral livelihood zone** is most likely to sustain Stressed (IPC Phase 2) due to the arrival of the *karan* harvest in November.

IDP settlements and urban areas: Social distancing measures, the decline in external remittances, and other negative impacts associated with the COVID-19 pandemic are expected to continue to suppress business activity. As a result, IDP and urban households are projected to face a 20-30 percent decline in their income through at least September. Rising staple food prices and below-normal daily income is most likely to drive an increase in the number of households experiencing acute food insecurity. From June to September, sustained humanitarian food assistance in many IDP settlements is expected to play a critical role in sustaining Stressed! (IPC Phase 2!) outcomes and preventing further deterioration in food insecurity. However, in the absence of planned assistance from October to January, widespread deterioration to Crisis (IPC Phase 3) is expected. In urban areas, poor households are likely to have food consumption gaps indicative of Crisis (IPC Phase 3) through January.

Events that Might Change the Outlook

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

Area	Event	Impact on food security outcomes
National	Failed <i>deyr</i> rainfall from October to December 2020	In the event that sea surface temperature anomalies in the Indo-Pacific strengthen and intensify the effect of the forecast weak La Niña, like in the 2016 <i>deyr</i> , or in the event that the forecast negative IOD strengthens to a strong negative IOD, like in the 1996 <i>deyr</i> , then the <i>deyr</i> rainfall season could fail (<80 mm). Crop failure would be likely in some livelihood zones, and net national production losses could range up to 50-80 percent below the long-term average. Atypical livestock abortions and deaths and an overall decline in livestock productivity and reproduction would be most likely. Emergency (IPC Phase 4) would be likely in Sorghum High Potential and Bay Bakool Low Potential Agropastoral livelihood zones. Crisis outcomes (IPC Phase 3) would be likely in all other agropastoral livelihood zones. In pastoral livelihood zones in central and northern Somalia, where Crisis (IPC Phase 3) outcomes would be widespread, some households would be in Emergency (IPC Phase 4). However, riverine areas would likely sustain Stressed (IPC Phase 2) outcomes due to <i>gu</i> - and <i>hagaa</i> -driven recessionary crop harvests.
	Average <i>deyr</i> rainfall with normal distribution from October to December 2020	In the event that ENSO and IOD conditions remain neutral, <i>deyr</i> rainfall would likely be near average. The rains would prove critical to preventing more widespread Crisis (IPC Phase 3) outcomes by sustaining good livestock body conditions and value, enhancing milk availability from new livestock births, reducing increased expenditures on water and atypical livestock migration, and increasing in-kind and cash gifts from camel milk produced by better-off households. Most pastoral areas would likely sustain or improve to Stressed (IPC Phase 2), even though income from casual labor, livestock labor, and remittances would remain below normal due to COVID-19. However, Addun and Hawd Pastoral of Central would likely remain in Crisis (IPC Phase 3) due to low saleable livestock holdings, which will take several seasons to recover. In agropastoral areas, the <i>deyr</i> harvest would likely be average, driving improvement to Stressed (IPC Phase 2). In riverine areas, however, a third consecutive season of floods – even at typical levels – would likely damage late-planted <i>gu</i> off-season crops and suspend <i>deyr</i> cropping activities. The loss of food, loss of income from agricultural labor, and displacement would likely lead to Emergency (IPC Phase 4).

AREAS OF CONCERN

Addun Pastoral livelihood zone of central Somalia (Figure 7)

Current Situation

Poor pastoral households in Addun Pastoral livelihood zone of central Somalia have yet to recover from the erosion of their main livelihood, livestock production, from recurrent droughts in 2016/17 and 2018/19. Although two consecutive seasons of above-average rainfall during the 2019 *deyr* and 2020 *gu* supported medium sheep/goat births and good milk productivity, the average herd size and composition remains too low to meet their essential food and non-food needs simultaneously and also grow the size of their herd back to sustainable levels. For the average poor household, the size of their herd has been stagnant since 2019, consisting of 2 camels and 27 sheep/goats (Figure 8). In the past three seasons, each new sheep/goat birth has been canceled out by sales to purchase food and pay down previous debt used to buy food. As a result, poor households’ livestock assets remain about 50 percent of the baseline year (2015). Poor households’ debt levels also remain high, ranging from 350-500 USD on average, which is roughly equivalent to the value of seven-ten goats.

Above-average rainfall in the 2020 *gu* led to marginal improvement in household food security compared to the 2019 *deyr*, as abundant pasture and water availability eliminated household expenditures on water trucking, eased livestock migration, and led to good livestock body conditions and productivity. However, household milk availability for consumption remains below normal only five-six sheep/goat births occurred this season compared to 8-10 in the baseline year. Low livestock holdings continue to be the main limiting factor for food access, even though prevailing livestock prices continue to offer broadly favorable terms of trade for cereals compared to the five-year average. Low livestock supply across the livelihood zone, coupled with good livestock health and body conditions, has thus far prevented steep declines in the livestock price despite the economic impacts of COVID-19 and the cancellation of the Hajj – both in rural key reference markets, such as Dhusamareb, and in Galkacyo, the main livestock trading hub in central Somalia.

Favorable livestock prices are mitigating the effect of above-average imported rice prices on household purchasing power. In Dhusamareb, a household could use the sale of a goat to purchase 54 kg of rice or 62 kg of sorghum, which is near the five-year averages. In Galkayo, the price of a goat is equivalent to 103 kg of rice and 202 kg of sorghum, which is 54-95 percent higher than the five-year average. However, poor households cannot capitalize on the above-average terms of trade due to the limited availability of saleable animals to cover their minimum food and non-food needs. Typically, the average household of six to seven must purchase 90 kg of cereals plus 25 kg of sugar, 3 kg of vegetable oil, and other essential non-food needs each month, requiring the sale of 1.5 goats/month in a normal year. With only five-six sheep/goats born each season over the past year, households face an annual shortfall of six-eight sheep/goat sales in 2020.

Labor income and social support are also below normal, due to the reduction in labor demand driven by declining remittance flows to urban areas and declining trade and investment. While most poor pastoral households in Addun do not receive remittances directly, they are indirectly affected as better-off households who do typically receive remittances are less able

Figure 7. Area of concern reference map: Addun Pastoral livelihood zone of central Somalia

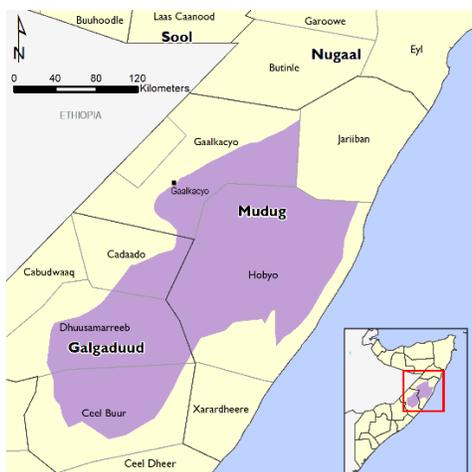
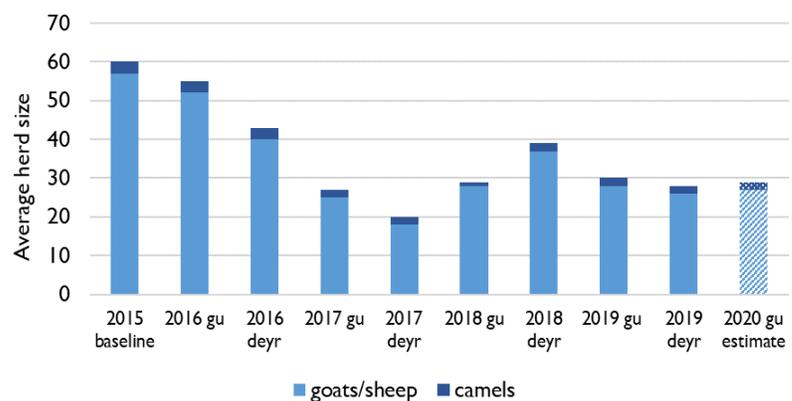


Figure 8. Average herd size among poor households, Addun Pastoral livelihood zone of central Somalia, 2015 - 2020



Source: FEWS NET and FSNAU

to provide social support or hire labor. Income from the sale of bush products, which remains normal, is not sufficient to fill the income gap. Further, according to the Food Security Cluster, the level of humanitarian food assistance delivered to this area has considerably declined since the final quarter of 2019. From March to May, food assistance reached only 9-11 percent of the population on average per month in Galgaduud and Mudug.

Based on persistently difficult food access due to low livestock holdings and other income sources, many poor households either have food consumption gaps or can only marginally meet their minimum food needs by selling animals at unsustainable levels. According to the results of FSNAU's nutrition survey in December 2019 and associated projections, Serious levels (GAM WHZ 10-14.9 percent) of acute malnutrition are anticipated in June based on below-normal milk and food consumption as well as non-food factors. Crisis (IPC Phase 3) outcomes are most likely.

Assumptions

In addition to the national assumptions, the most likely outcomes in Addun Pastoral livelihood zone are based on these assumptions:

- With locust infestation control measures ongoing in parts of central and due to the cumulative favorable outcomes from Deyr 2019 and Gu 2020 rainfalls, dry pasture and water availability are likely to be average to above average through September. However, due to forecast below-average *deyr* rainfall and persistent risk of desert locust damage, below-normal rangeland conditions are likely from October to December. This will diminish livestock body conditions and value.
- Income from self-employment activities, such as firewood and charcoal sales, are expected to be normal.
- Medium to high goat conceptions in the 2020 *gu* will likely lead to medium to high goat births in the 2020 *deyr*. Due to a below-normal number of lactating animals and lower pasture and water availability in the *deyr*, goat milk consumption and sales will remain below typical levels. However, the likelihood of one camel birth, on average, mid-way through the 2020 *deyr* season will likely improve households' access to milk for consumption and sales in December and January.

Most Likely Food Security Outcomes

From June to September, Crisis (IPC Phase 3) outcomes are expected to persist, and an increasing proportion of poor households are likely to experience large food consumption gaps indicative of Emergency (IPC 4) during the dry season. Despite improved livestock body conditions and goat births during the 2020 *gu*, poor households' food and income sources are expected to be limited through September. This will be driven by a below-normal number of saleable animals, as the current herd is composed of pregnant females, females that will conceive in the *deyr*, and lambs/kids less than one year old. Pressure to repay debt given current good livestock values will further constrain their remaining income to purchase food and other essential needs. Given low births in the *gu*, access to milk for consumption will also be minimal through September.

From October to December, the forecast below-average *deyr* rains is most likely to prevent any notable improvement in the food security situation. Although below-average rains will partially replenish rangeland resources, access to pasture and water is most likely to be below-normal and may require increased expenditures on water and atypical migration in search of pasture. The below-average rains would also reduce milk productivity among their livestock and reduce the amount of in-kind milk gifts from better-off households. The ongoing risk of desert locust damage to pasture in this livelihood zone could also exacerbate the situation, while limited control capacity due to clan conflict could further constrain access to pasture and water. However, poor households are anticipated to benefit from one camel birth, on average, toward the end of the *deyr* season. This will provide a critical source of additional milk for consumption and sale, preventing worse deterioration in food insecurity. Crisis (IPC Phase 3) outcomes and a Serious level of acute malnutrition will most likely be sustained.

Riverine Gravity Irrigation livelihood zone of Lower Juba, Middle Juba, and Middle Shabelle regions (Figure 9)

Current Situation

In riverine areas of Lower and Middle Juba and Middle Shabelle, poor households are facing their second consecutive season of below-average crop production due to severe river floods. In April/May, heavy rainfall in these areas as well as in the upstream river catchments displaced 268,000 people in this livelihood zone and destroyed approximately 22,000 ha of off-season 2019 *deyr* maize, sesame, and cowpea and recently planted 2020 *gu* crops. While most households have been able to return home, they face very limited cereal stock availability and reduced agricultural labor income. Despite below-average rainfall in May, the arrival of the *hagga* winds in June, and receding river water levels, most farms remain waterlogged. This prevented households from re-planting in time for the main *gu* harvest in July. In addition, the early end of the *gu* rains within the livelihood zone and in neighboring agropastoral areas diminished labor demand, reflected in a 26 percent decline in the

daily wage rate in Wanlaweyn of Lower Shabelle in May compared to the five-year average. Access to fishing and wild fruit/vegetable collection has also been below normal since May, due to an elevated risk of crocodile and snake attacks in inundated areas. At this time, poor households are only gradually beginning to engage in recessionary cultivation of off-season cash and cereal crops in areas where floodwaters are receding.

At a time when households are highly dependent on markets to purchase their food, purchasing power has declined. The price of a liter of cattle milk, which is already seasonally high since livestock migrate away from rivers to avoid water-borne diseases, was 8-10 percent above the five-year average in Jilib of Middle Juba and Jowhar of Middle Shabelle reference markets in May. Similarly, prevailing high maize prices and declines in the daily labor wage drove a decline in the sorghum-to-labor terms of trade in May. In Jilib, for example, a day's labor wage could only purchase 6 kg of maize, which is 50 percent below May 2019 and 33 percent below the five-year average. Although households rely heavily on credit to purchase food and receiving some gifts/social support, these sources alone are not enough to compensate for the loss of own-produced off-season crops for consumption and sales. As a result, most poor households are facing moderate to large food consumption gaps. Crisis (IPC Phase 3) outcomes are most likely on the area level, but around 10-15 percent of the population likely have large food consumption indicative of Emergency (IPC Phase 4).

Assumptions

In addition to the national assumptions, the most likely outcomes in Riverine Gravity Irrigation livelihood zone are based on the following assumptions:

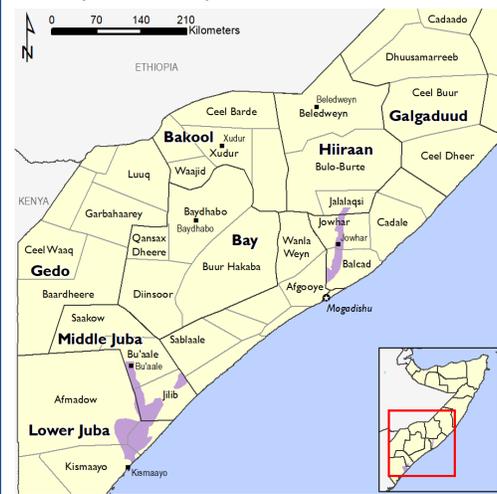
- Based on crop losses and area planted, the *gu* harvest in July will be significantly below average, prolonging the lean season until September. From June to September, many households will focus on off-season cereal crop production as flood waters recede. However, the *hagga* winds tend to accelerate depletion of soil moisture, even after waterlogging occurs. Due to below-average *hagaa* and *deyr* rains, the off-season harvest in September/October will likely be below average. The net main and off-season *gu* harvest is projected to be 25-30 percent below normal in this livelihood zone.
- From June to September, labor demand on local cash crop farms or on farms in neighboring agropastoral areas will most likely be below normal due to below-average production. From October to January, labor demand is expected to be normal based on combined labor demand for continuous recessionary cultivation and *deyr* land preparation and planting.
- As flood waters recede, households will regain access to fishing and wild vegetable gathering. From June to September, availability will be above normal following the floods. From October to December, availability is expected to remain high since below-average *deyr* rains tend to diminish the risk of river flooding while also replenishing these food sources.
- According to FEWS NET's integrated analysis, the price of maize in Jilib of Middle Juba, a key reference market, is projected to be 20-30 percent above the five-average throughout the scenario period. High maize prices will be driven by tight maize supplies due to below-average *gu* crop production. Although the below-average July harvest in agropastoral areas will somewhat improve market supply, it will likely only alleviate price pressures through September.

Most Likely Food Security Outcomes

From June to September, Crisis (IPC Phase 3) outcomes will most likely persist due to limited own-produced cereal stock availability, below-normal income, and below-normal purchasing power. Cash food purchases will decline due to diminished agriculture labor income, income from cash and cereal crop sales, and high cereal prices. Poor households' access to credit food purchases will also decline due to existing high debt burdens. Some households will likely be in Emergency, but more widespread deterioration on the area level will most likely be prevented by the start of the green maize and cowpea harvest by late August. Consumption of wild vegetables and fish will also provide a critical food source in the prolonged lean season, as will sales of bush products and grass fodder during the *hagaa* season.

From October to January, the timing of the off-season harvest and availability of multiple food and income sources is anticipated to drive improvement to Stressed (IPC Phase 2), though some households previously in Emergency (IPC Phase 4)

Figure 9. Area of concern reference map: Riverine Gravity Irrigation livelihood zone of Lower Juba, Middle Juba, and Middle Shabelle



Source: FEWS NET and FSNAU

may only improve to Crisis (IPC Phase 3). The availability of the below-average, off-season *gu* harvest will likely provide at least one month of cereal stocks in September/October, while the continuous recessionary cultivation is most likely to result in weekly availability of fresh maize and cowpeas through November. The off-season cash crop harvest (pumpkins, tomatoes, cowpea, and sesame) and a normal level of agricultural labor income will also provide cash for partial debt repayment and food purchases. In-kind *zakat* gifts from wealthier households with relatively better harvests are also typical during this period. Finally, households will supplement these food and income sources with fish and wild vegetable collection.

Sorghum High Potential and Low Potential Agropastoral livelihood zones of Bay and Bakool regions (Figure 10)

Current Situation

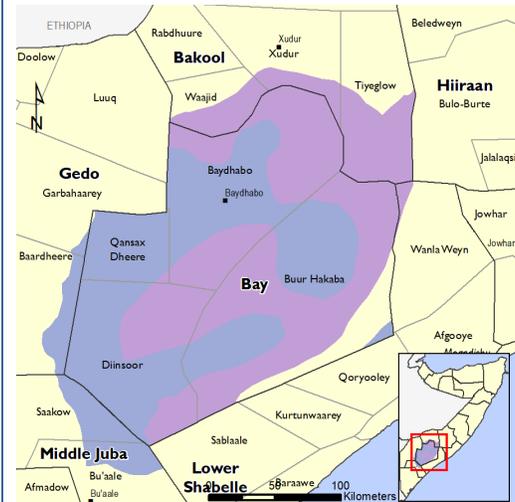
In Sorghum High Potential and Low Potential Agropastoral livelihood zones of Bay and Bakool regions, below-average *gu* rainfall and atypically high pest incidence (crickets, stalk borer) have reduced cereal and cash crop production prospects. Below-normal crop development led to reductions in weeding labor demand in May, though some improvement occurred in southern Bay in June due to favorable *hagaa* rains. In both livelihood zones, poor households earn nearly 50 percent of their annual income from agricultural labor; however, poor households in low potential areas have fewer productive assets or income sources relative to those in the high potential areas. In June, poor households are currently earning some income from milk and livestock sales, while reducing non-staple food purchases and other essential non-food expenses. While staple food prices have so far remained near the five-year average, a rising trend is observed as markets begin to anticipate a below-average harvest in July. In Baidoa, which is a key cereal market for both regions, a kilogram of red sorghum rose 12 percent between the first (SOS 5,200) and fourth (SOS 5,800) weeks of June. The June sorghum price is nine percent higher than June 2019, which was also a poor *gu* crop production season, but is eight percent below the five-year average. As a result, the daily wage-to-sorghum terms of trade in Baidoa started to fall from 20 kg per daily wage in May to nearly 18 kg in June, which is near the five-year average. Stressed (IPC Phase 2) outcomes are currently being sustained, but an increasing number of poor households are falling into Crisis (IPC Phase 3).

Most Likely Food Security Outcomes

From June to September, food security in northern Bay Bakool Low Potential Agropastoral livelihood zone is expected to deteriorate to Crisis (IPC Phase 3). In Bakool and in Baydhaba district of Bay, the harvest is expected to be 40-50 percent below the post-war average. Among poor households, the harvest is anticipated to provide only one-two months of cereal stocks, but half will likely go to repayment of debt incurred in the April-June lean season. In-kind *zakat* in July will provide additional food but will also be below-normal levels. In addition, income earned from harvesting and storing labor opportunities is expected to be low and poor households will face difficulty meeting both their food and non-food needs. Based on early depletion of *gu* stocks and a decline in income, poor households are most likely to experience food consumption gaps indicative of Crisis (IPC Phase 3) and Serious (GAM WHZ 10-14.9 percent) levels of acute malnutrition. In contrast, southern Bay Bakool Low Potential Agropastoral and Sorghum High Potential Agropastoral livelihood zones are expected to remain Stressed (IPC Phase 2), though some poor households may be in Crisis (IPC Phase 3). In these areas, the *gu* harvest is projected to be 10-20 percent below the post-war average due to better distribution of *hagaa* rainfall.

From October to December, food security is anticipated to deteriorate across both livelihood zones due to below-average *deyr* crop production prospects. In northern Bay Bakool Low Potential Agropastoral livelihood zone, the lack of *gu* carryover cereal stocks will render many households entirely reliant on food purchases. While *gu* stocks will last longer in southern low potential areas and in high potential areas, households will also rely on food purchases earlier than usual. At the same time, households will continue to earn below-normal income from agricultural labor even as they face weakening household purchasing power. As sorghum prices rise, the labor-to-cereal terms of trade will likely decline. As a result, Crisis (IPC Phase 3) outcomes are most likely in both livelihood zones. In Bay-Bakool Low Potential Agropastoral livelihood zone, particularly in the North, some poor households may deteriorate to Emergency (IPC Phase 4). Food security is likely to only marginally improve in January with the start of the below-average 2020 *deyr* harvest.

Figure 10. Area of concern reference map: Bay Bakool Low Potential and Sorghum High Potential Agropastoral livelihood zones of Bay and Bakool

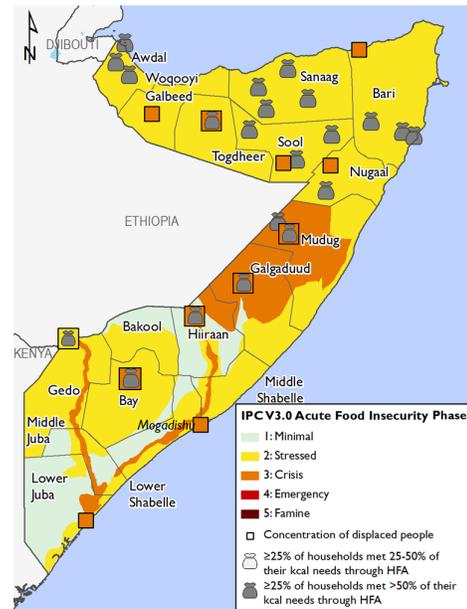


Source: FEWS NET and FSNAU

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

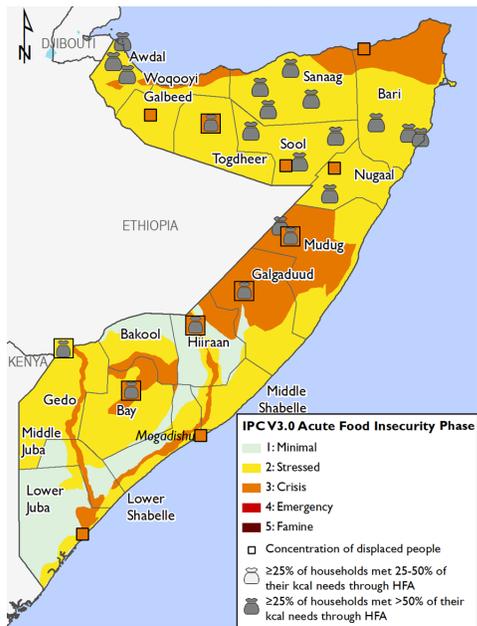
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☹️ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian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

Current, June 2020



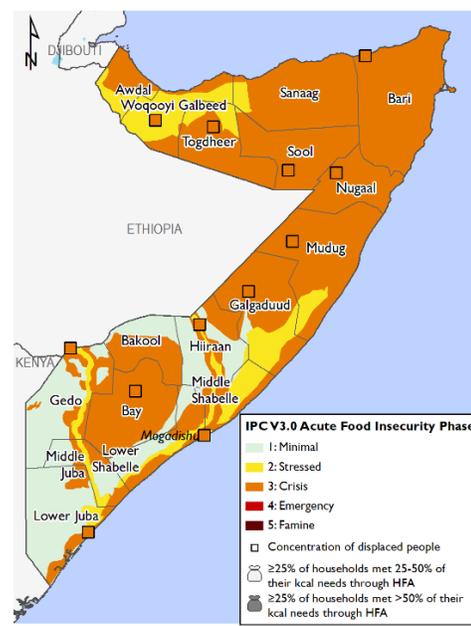
Source: FEWS NET and FSNAU

Projected food security outcomes, June to September 2020



Source: FEWS NET and FSNAU

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET and FSNAU

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

ABOUT SCENARIO DEVELOPMENT

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