

SOMALIA Food Security Outlook

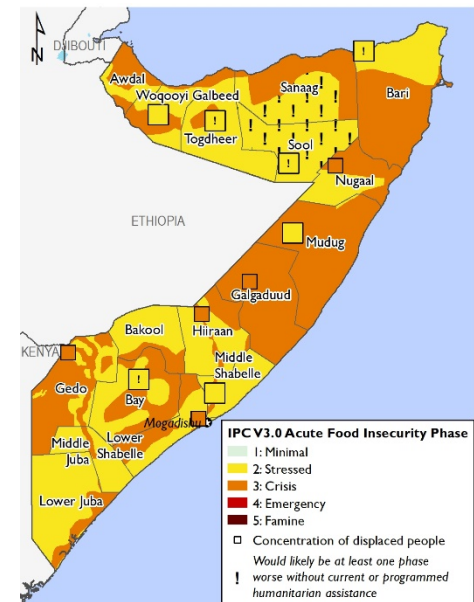
June 2021 to January 2022

Multi-season drought is expected to drive high food assistance needs through early 2022

KEY MESSAGES

- The impacts of two consecutive below-average rainfall seasons on crop and livestock production in late 2020 and early 2021 have driven a sharp increase in the food insecure population in Somalia, especially in rural areas. Drought conditions led to some livestock losses in northern and central Somalia in early 2021 and increased household spending on animal feed and water. Dry spells and the early end of the *gu* rainfall season also caused crop losses and reduced agricultural labor income. Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes are widespread.
- The food insecure population is expected to remain elevated until at least January. Based on FSNAU and FEWS NET's preliminary estimates, the 2021 *gu* cereal harvest in July will be at least 30-40 percent below the long-term average (1995-2020), which will diminish a key source of food and income for farmers and drive an increase in local staple food prices in both rural and urban areas. Additionally, poor pastoral households will likely sell more livestock than usual to repay debt and fund food and water purchases during the upcoming prolonged dry season, eroding their livelihoods and coping capacity. Furthermore, long-term forecasts indicate a third consecutive season of below-average rainfall in late 2021, which would likely result in a three-season drought.
- Humanitarian food assistance plans are significantly under-funded in Somalia, resulting in a 25 percent decline in beneficiaries since January, even as the population in need of food assistance increased. Although an average of 1.52 million people received food assistance monthly from March to May, current and anticipated levels of food assistance are inadequate to prevent Crisis (IPC Phase 3) in many areas. The shortfall in funding is of urgent concern, as past trends show the severity of food insecurity in Somalia can rapidly worsen during multi-season droughts. In a worst-case scenario of rainfall failure, more extreme food security outcomes would be likely. A scale-up in food, water, and livelihoods support is needed to prevent Crisis (IPC Phase 3) or worse outcomes through at least the end of 2021.

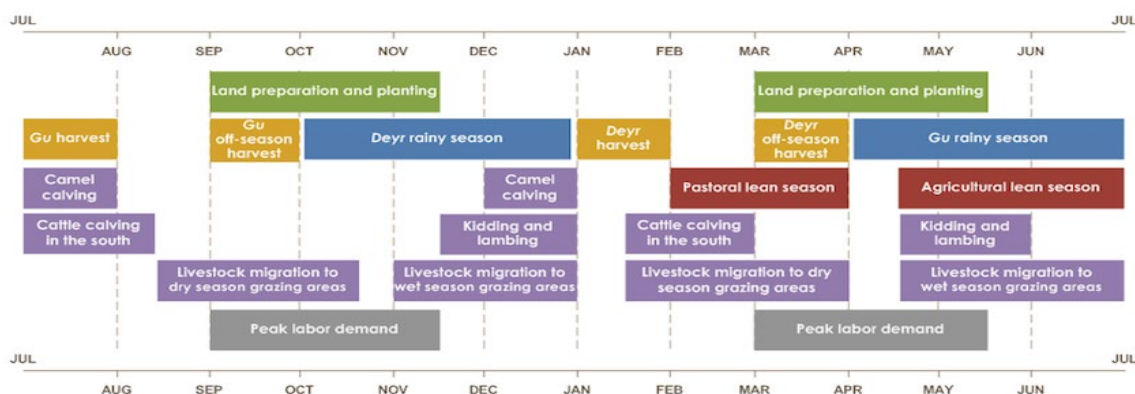
Current food security outcomes, June 2021



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.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

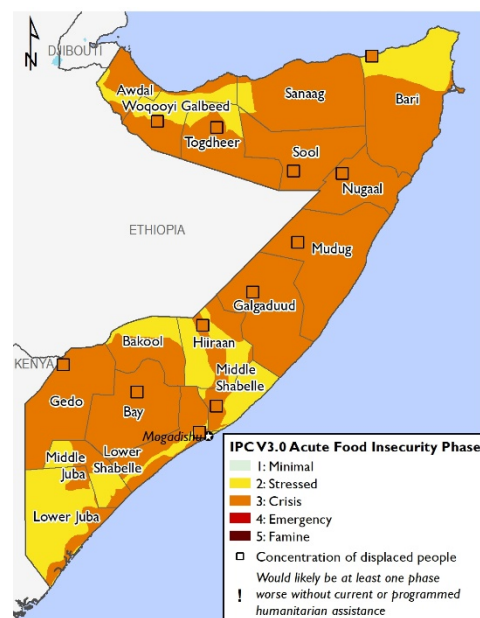
Rainfall performance: The April to June 2021 *gu* rainfall season began late, performed erratically, and concluded early. This is the second consecutive season of poor rainfall performance in Somalia, where the below-average 2020 *deyr* triggered widespread drought in late 2020. Subsequently, a three- to four-week delay in the onset of the 2021 *gu* prolonged drought conditions through mid-April 2021, which is typically a peak rainfall month for crop production in the South. When the *gu* season finally began, most rainfall accumulation occurred within a short timeframe between late April and early May, which caused localized riverine floods in Beletweyne and Jowhar and flash floods in the Northwest. The rains also created conducive breeding conditions for Desert Locust, particularly in the Northwest, though air and ground control operations are underway to limit their growth. Rainfall then subsided atypically early in many areas in mid-May.

Although the mid-season rains alleviated rainfall deficits in the Northwest and parts of central Somalia, total rainfall accumulation is 20-50 percent below average in much of the South and parts of northeastern and central Somalia. According to CHIRPS satellite-derived data, rainfall deficits range up to 100 mm or more in key crop-producing regions, including Lower and Middle Shabelle, Lower and Middle Juba, Bay, and Bakool (Figure 1). Ground reports in the pastoral Northeast suggest rainfall performed worse than indicated by satellite imagery, especially in Coastal Deeh Pastoral and Fishing, Northern Inland Pastoral, and Addun Pastoral livelihood zones. Furthermore, the start of the June to August *hagaa* rains, which are localized to southern Bay and southern coastal districts, began with low intensity in late June and are so far below average.

Agricultural production: Poor rainfall performance and other factors have resulted in significantly below average 2021 *gu* cereal production prospects in the South and the central Cowpea Belt. Due to the late onset of rainfall, which farmers foresaw would shorten the growing season, area planted for the 2021 *gu* is below average. The short and below-average rains then inhibited seed germination and crop development. According to the satellite-derived Water Requirement Satisfaction Index, inadequate water availability has resulted in mediocre to failed cropping conditions (Figure 2). Furthermore, farmers in the key sorghum-producing regions of Bay and Bakool opted to plant more maize than sorghum to prevent sorghum crop losses caused by quelea birds. Maize requires more water than sorghum, however, and crops in rainfall-deficit parts of the region are experiencing severe moisture stress. Overall, preliminary field assessments and analysis of historical crop data suggest the 2021 *gu* cereal harvest in central and southern Somalia is at least 30-40 percent below the long-term average (1995-2020). However, a larger deficit is possible, and a final estimate will be available after the July post-*gu* field assessment.

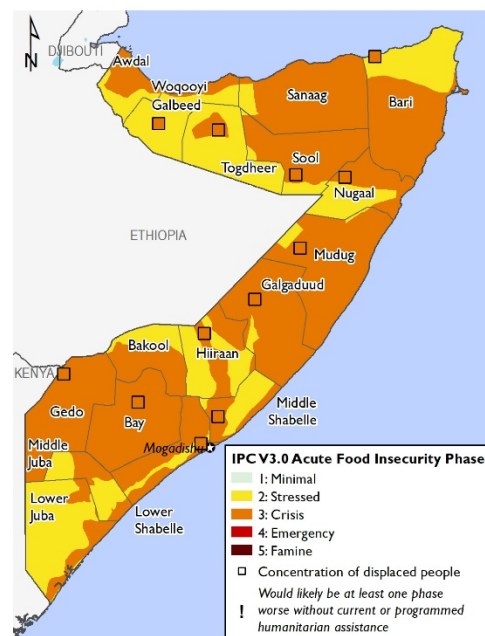
In southern and central agropastoral areas, cropping conditions are poorest in Bakool, Gedo, Hiraaan, and Middle and Lower Juba and in the Cowpea Belt. Most of these areas are marginal cereal producers, and the early end of season reduced both cereal and fodder prospects. Cereal production prospects are also below normal in Lower and Middle Shabelle, which typically account for a large proportion of Somalia's annual cereal production. Cultivation was not only affected by below-average rainfall, but also by frequent confrontations between

Projected food security outcomes, June to September 2021



Source: FEWS NET and FSNAU

Projected food security outcomes, October 2021 to January 2022



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.

insurgents, clan militias, and the national army supported by AMISOM. Although the June to August *hagaa* rains typically support late-planted crops, prospects depend on access to irrigation and rainfall performance in July and August. Currently, access to irrigation is low. The Shabelle River is low in most regions due to the destruction of the Qoryooley main barrage in 2019, which previously facilitated river water flows to the downstream districts in Lower Shabelle region. Without this barrage, poor rainfall has suspended irrigation activities in Kurtunwarrey, Qoryoley, and Sablale districts of Lower Shabelle.

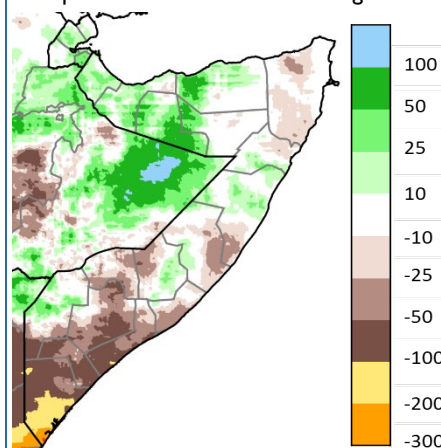
Localized flooding, poor rainfall, and insufficient irrigation infrastructure have reduced both main season *gu* cereal prospects and off-season recessional cultivation prospects in the riverine areas of Gedo, Hiiraan, and Middle and Lower Juba. In late April and early May, an unrepaired river breakage at Baarey village in Jowhar district village of Lower Shabelle region caused severe floods that affected an estimated 25,000-35,000 ha of cultivable land in nearly 40 villages. In Hiraan, river floods in northern Beletweyn district displaced approximately 1,000-1,500 households and inundated 3,000-4,000 ha of cultivated farmland and 4,500-5,300 ha of uncultivated farmland. In Riverine Pump Irrigation livelihood zone in Gedo and Hiiraan, irrigation was only briefly available in late May and early June due to low river water levels; overall, little to no off-season cultivation is possible. In the Juba regions, strong winds and poor rainfall have also affected late-planted crops and standing off-season crops, causing losses and stunting crop growth.

In the Northwest, inadequate rainfall led farmers in Northwestern Agropastoral livelihood zone to forego yellow maize planting and no maize harvest is expected in July. However, this area also receives the July to September *karan* rains. Land preparation is ongoing and some farmers have already started to plant long-cycle white sorghum for the *karan* harvest in November. Desert Locusts, which are present in Awdal region, have so far caused limited crop damage. In Togdheer Agropastoral livelihood zone, where poor rainfall has raised the likelihood of failure of the short-cycle red sorghum crop, farmers are pursuing grass fodder production instead. Fodder is performing normally and offers labor and self-employment income.

Livestock production: As a result of erratically distributed rainfall, the availability of pasture and water varies throughout the country. In the Northwest, ground reports and satellite imagery indicate pasture is above to near normal levels, which has encouraged out-migrated livestock to return (Figure 3). In the Northeast, ground reports are more pessimistic than available satellite imagery and suggest pasture and water availability is below normal levels, especially in Coastal Deeh Pastoral, Northern Inland Pastoral, and Addun Pastoral livelihood zones in Bari and northern Mudug. Ground information also indicates that water sources in most areas were only partially refilled, making access to water below normal. In central regions, pasture and water availability range from normal in most of Hawd Pastoral and western Addun Pastoral livelihood zones to below normal in all other areas. In the South, pasture and water availability are normal in most of Hiiraan and Bakool, but range from below normal to normal across Bay, Gedo, and the Juba and Shabelle regions.

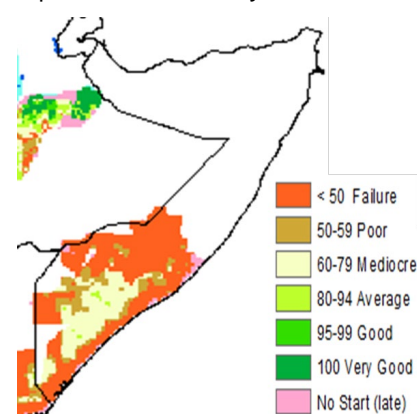
With water available in most reservoirs, water prices have declined in most areas but remain atypically high. Between March and May, the price of a 20-liter jerry can of water decreased by an average of 55 percent across northeastern markets, an average of 9 percent across central markets, and between 12 and 33 percent in most of the South. Overall, prices still remain above normal (Figure 4). Meanwhile, prices remained the same in the

Figure 1. Difference in total rainfall (mm) received from April 1 to June 30, 2021, compared to the 1981-2020 average



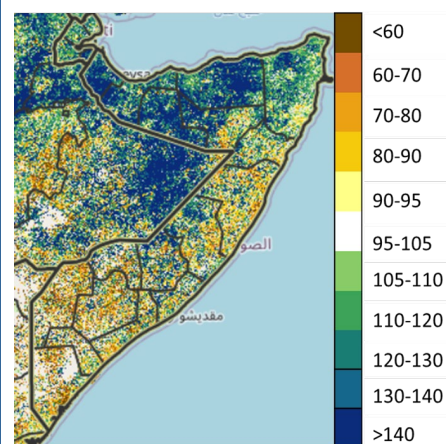
Source: *Climate Hazards Center, UC Santa Barbara*

Figure 2. Cropping conditions based on the satellite-derived Water Satisfaction Requirement Index as of June 30, 2021



Source: *FEWS NET*

Figure 3. Vegetation conditions compared to the 2003-2017 median based on the eMODIS Normalized Difference Vegetation Index as of June 20, 2021



Source: *FEWS NET*

Northwest. However, water prices have double in Caadale district of Middle Shabelle.

Due to relative improvement in access to pasture and water since late April, livestock body conditions are currently normal in most southern, central, and northern regions. However, livestock body conditions have improved less significantly and remain somewhat below average in parts of Gedo, Hiraan, northern Mudug, Nugaal, and Bari regions. Most pastoralists in these areas are pursuing both normal and atypical migration patterns, moving short-to-long distances within and outside their livelihood zones.

The mid-season boost in rangeland conditions supported a normal, medium level of conception of sheep and goats in most areas. However, cattle and camel conception is low, mainly due to the timing of reproduction cycles with many females either currently lactating or already conceived from previous seasons.

The exceptions include Coastal Deeh Pastoral, Addun Pastoral, and pastoral and agropastoral areas in Gedo, where the conception of all livestock species was low. Furthermore, sheep and goat herds in most pastoral livelihood zones in the central and northern regions remain well below baseline levels due to high offtake during the January to March *jilaal* dry season, including miscarriages and culling of weak off-spring that were born during the *jilaal* in some areas.

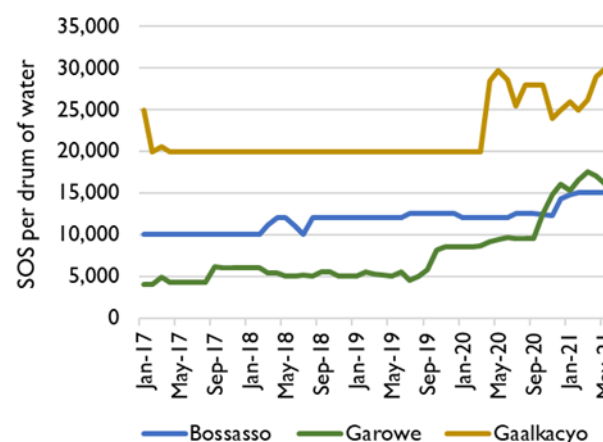
Macroeconomic conditions: According to analyses by the African Development Bank (AfDB) and the World Bank, the impacts of multiple weather shocks and the COVID-19 pandemic on agricultural production, external remittances, supply and value chain functioning, and other economic activity led to 1.5 percent contraction in real GDP in 2020. Sluggish economic activity has also been driven by a reduction in foreign direct investment corresponding to the uncertain investment environment following the postponed national elections, as well as the partial ban on livestock exports by the Gulf countries.¹ Dollarization and currency counterfeiting continue to limit monetary policy options to stimulate economic activity. However, the government's decision to provide tax relief on food commodities is estimated to have driven a slight decline in annual inflation from 4.7 percent in 2019 to 4 percent in 2020, according to the AfDB's calculations.

In 2021, the relaxation of COVID-19 movements restrictions within Somalia and abroad has assisted in economic recovery, driven by the re-opening of all sectors, partial recovery of livestock exports, and recovery of formal remittances. Available livestock export data from Bossasso port authorities show that cumulative exports from January through May 2021 already exceed exports during the same periods of 2018 and 2019 by 15-30 percent, though this is partly due to the earlier start of Ramadan. However, multiple analyses by the World Bank, the IOM, and FSNAU conclude informal remittances likely remain below pre-pandemic levels. Based on the World Bank's data, official remittance inflows rose year on year by an estimated 18 percent in 2020 largely due to improvements in the recording of official flows, but it is likely that informal remittances have declined. GDP growth is expected to recover to 2.9 percent in 2021 and 3.2 percent in 2022; however, the World Bank estimates that an increase in unemployment and the significant loss of wages and remittances during 2020 has led to an overall increase in poverty, reaching 71 percent compared to 69 percent in 2017.

The value of the Somali shilling (SOS) remains stable in most areas, while the value of the Somaliland shilling (SLS) has appreciated. From March to May 2021, the SOS to USD exchange rate was stable across southern and central Somalia and most of northeastern Somalia, with a few exceptions, such as Bossasso where the SOS slightly depreciated. Meanwhile, the Somaliland shilling (SLS), which is used in the Northwest, gained by about 5-10 percent compared to May 2020 due to the increased supply of dollars in the markets related to an influx of funding for Somaliland election campaigns.

Markets and trade: Due to below-average domestic crop production in 2020/21, the market supply of staple cereals is significantly below normal and prices are increasing (Figure 5). Although imports of sorghum and maize from Ethiopia (4,115 metric tons) to central and northern Somalia remained stable from March to May compared to the same period of 2020, the contribution of these imports to the total cereal supply is relatively low. For instance, the retail price of a kilogram (kg) of red sorghum in Baidoa in Bay region is 35 and 20 percent higher than last year and the five-year average, respectively, while the price of a kg of white maize in Qoryoley in Lower Shabelle is 20 percent above both reference periods. In agropastoral areas

Figure 4. Price of a drum of water in select reference markets in northeastern and central Somalia, January 2017-May 2021



Source: FEWS NET and FSNAU

¹ A ban placed by the Saudi Arabian government on livestock imports from Somalia has been in place since 2016, due to the detection of Rift Valley Fever. However, the Kingdom has allowed imports during the *Hajj* seasons.

of the Northwest, the retail price of a kg of sorghum was, on average, 10-12 percent above last year and the five-year average.

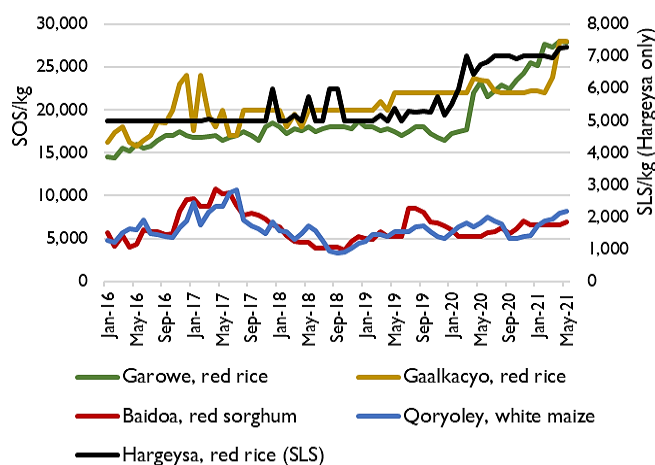
Meanwhile, the average price of most essential imported commodities (rice, wheat flour, diesel, sugar, and vegetable oil) has risen in local currency terms across most reference markets since March (Figure 5). Year-on-year comparisons indicate mild to moderate (6-18 percent) price increases, but significant price hikes (10-40 percent) above the five-year average across most of the country. Generally, the trend is driven by rising global food prices, increased transportation costs related to rising global fuel prices, and supply-side logistical constraints. To a lesser extent, a seasonal increase in demand during Ramadan (April/May) also contributed. The highest price increases were observed in Puntland, due to earlier depreciation of the local currency against the USD, and in parts of the southern Sorghum Belt, due to insecurity-related trade disruptions.

Livestock prices have seasonally increased since March, driven by improving body conditions and rising demand for restocking leading up to the *Hajj* season in August. Livestock prices, especially goats, are above last year and the five-year average in most regions due to low supply since 2016/2017 and consistent, seasonal demand. In May, the price of a local quality goat was ranged from 5 to 15 percent above the 2020 average and 10 to 20 percent above the five-year average in monitored markets across the country. Above-average livestock prices have kept pace with or exceeded above-average cereal prices, maintaining or boosting household purchasing power (Figure 6). However, many poor households are constrained in their ability to take advantage of this, given that their livestock holdings remain low after multiple droughts since 2016.

In most agropastoral and riverine areas, agricultural labor demand and wage rates are below normal due to the effects of below-average rainfall on *gu* harvest prospects. As a result, purchasing power among labor-dependent households has declined. On average, the labor-to-cereal terms of trade declined by 10-20 percent below the five-year average, including in Baidoa, for example (Figure 6). The exception to this trend is in northwestern agropastoral areas, where the labor wage remains normal and locally-produced cereal prices remain favorable, maintaining household purchasing power.

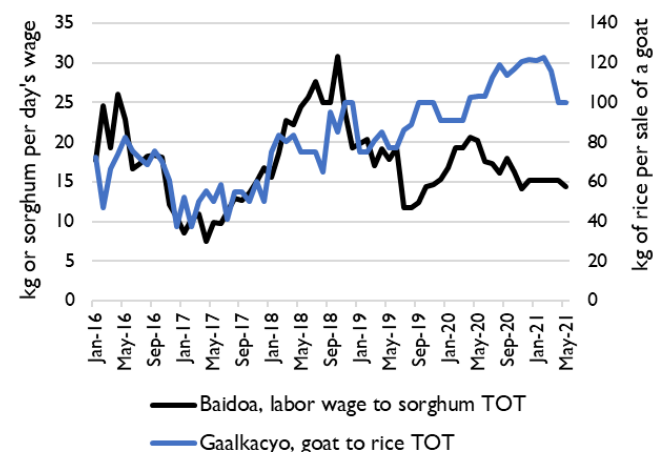
Conflict, insecurity, and displacement: Conflict and insecurity in southern and central Somalia significantly increased during the first quarter of the year, driving cycles of displacement, disruptions to livelihood activities, and constraints on trade and humanitarian access. Based on conflict event data captured by [The Armed Conflict Location & Event Data Project](#), a total of 850 security-related incidents were reported across Somalia between January and April 2021, reflecting a 7.3 percent increase in events compared to the same period of 2020. Most incidents happened in Lower Shabelle, Banadir, Lower Juba, and Bay regions. The increase in conflict during this period is attributed to both increased insurgent activity and political instability. Namely, the repositioning of Somali National Army (SNA) forces in recent months, coupled with the clan fault-lines among federal forces that this has exposed, created a wider security vacuum in south-central and central Somalia. At the same time, political instability reached a peak during this period, driven by uncertainty regarding the trajectory of the delayed national elections. Since April, the immediate risk of widespread political violence and/or civil war in Mogadishu has declined following President Farmaajo's retraction of plans to extend his term by two more years, and there is steady progress towards elections scheduled to take place in August 2021.

Figure 5. Price per kg of imported rice and domestic maize and sorghum in various reference markets, January 2016-May 2021



Source: FEWS NET and FSNAU

Figure 6. Labor-to-sorghum terms of trade in Baidoa, Bay, and goat-to-rice terms of trade in Gaalkacyo, January 2016-May 2021

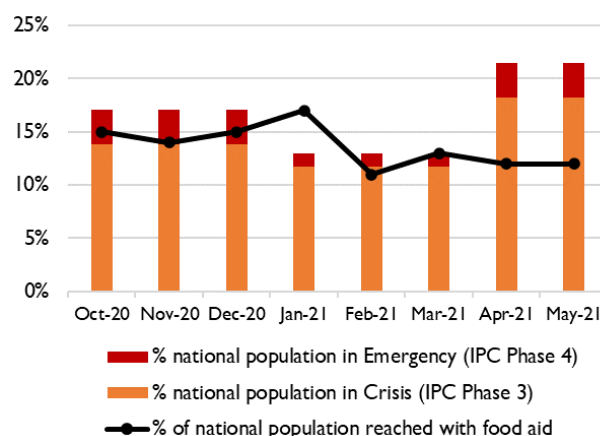


Source: FEWS NET and FSNAU

According to the **UNHCR Protection and Return Monitoring Network (PRMN)**, more than **492,000 people were displaced across Somalia between January and June 2021, primarily due to conflict (73 percent), drought (14 percent), and floods (11 percent)**. The highest levels of displacement occurred in Banadir, which accounted for 39 percent of new displacements, followed by Bay (14 percent), Gedo (8 percent), Middle Shabelle (8 percent) and Lower Shabelle (7 percent). Given the increase in armed clashes, periodic disruptions to trade flows mainly affected Bakool, Bay, and Hiiraan regions. Insurgents also torched many villages in Wanlaweyn and Burhakaba districts, where they confiscated assets and forcefully took livestock and other transportable assets.

There are also concerning reports of severe acute malnutrition among refugees that have fled Somalia to Dollo Ado settlement in Ethiopia. According to the data from humanitarian partners shared with the Food Security and Nutrition Working Group, there was a Global Acute Malnutrition (GAM) prevalence of 26 percent, including a Severe Acute Malnutrition prevalence of 11 percent, among 728 children under five. This sample was drawn from a total of 2,417 Somali refugee arrivals from Gedo, Bay, Banadir, Bakool, and Hiiraan. The level of GAM is well above the lower bound for 'Critical' (GAM weight for height z-score of 15-29.9 percent).

Figure 7. Percent of the Somali population that received food assistance compared to the percent of the Somali population that needs food assistance



Source: FEWS NET and FSNAU using data from the 2020-2021 Somalia IPC workshops and the Somalia Food Security Cluster

Humanitarian food assistance: Food assistance levels have fallen by 25 percent since January due to inadequate funding, according to distribution data from the Somalia Food Security Cluster. Although humanitarian agencies planned to deliver food assistance to over 2.1 million people, actual levels of assistance decreased from 2.05 million people in January to a monthly average of 1.52 million people from March through May. The combination of insufficient funding and limited humanitarian access means that only 12 percent of the national population has received food assistance monthly since February, which is below the estimated 18 percent of the population that the **January 2021 Somalia IPC** projected would need food assistance to prevent Crisis (IPC Phase 3) or worse outcomes between April and June. While food assistance is likely mitigating the severity of food security at the household level in many areas, current levels are inadequate to prevent Crisis (IPC Phase 3) outcomes in many areas. Not only is assistance below the current level of need, but it is also concentrated in urban areas and IDP settlements, leaving many rural populations underserved due to conflict and insecurity. In rural areas, the share of the population receiving food assistance is highest in Sool and Sanaag and lowest in Bakool, Banadir, Bari, Lower Shabelle, Middle Juba, and Nugaal, where food assistance has reached ≤ 10 percent of the regional population.

Current Outcomes

The impacts of the late 2020/early 2021 drought and the below-average 2021 *gu* rains on crop and livestock production are driving widespread Crisis (IPC Phase 3) outcomes. Areas in Crisis (IPC Phase 3) include many north-central pastoral areas, pastoral areas of Gedo, most agropastoral areas, and several riverine areas. Furthermore, an atypically high number of households are in Emergency (IPC Phase 4) in areas of highest concern, including in Bay Bakool Low Potential Agropastoral, Addun Pastoral, Coastal Deeh Pastoral, and central Hawd Pastoral livelihood zones, as well as parts of Gedo and the Northwest. Current levels of humanitarian food assistance remain below the total national population in need, especially in rural areas. However, significant levels of food assistance are likely preventing worse outcomes in Northern Inland Pastoral livelihood zone in Sool and Sanaag, where Stressed! (IPC Phase 2!) outcomes are most likely in June. Given the distribution of food assistance, Stressed! (IPC Phase 2!) outcomes are also likely in urban areas and urban IDP settlements in June, mitigating the effect of rising cereal prices, limited income-earning activities, and high food expenditures as a share of total income.

In northern and central pastoral areas, below-average to poor rainfall significantly affected livestock health and saleability, reducing a critical source of food and income. Although some herd recovery occurred in 2020, most poor households have yet to recover their livestock herd sizes due to the impacts of recurrent drought on livestock reproduction and sales. In the livelihood zones where drought conditions were most severe through April, including in Addun Pastoral and Coastal Deeh Pastoral, livestock losses due to hunger-related diseases and malnourishment further reduced herd sizes. Given the recent regeneration in pasture and water that helped restore livestock body conditions, many poor households have seized the opportunity to sell more livestock than usual in order to repay debts incurred for water, animal feed, and food purchases during the prolonged dry season. Pastoralists currently hold an estimated average of USD 400-500 in debt. The combination

of household debt accrual, low livestock saleability, stagnant or declining herd sizes, and low household milk consumption and sales have all contributed to Crisis (IPC Phase 3) outcomes. In localized pastoral areas in southern and northern Somalia, however, Stressed (IPC Phase 2) outcomes have been sustained due to higher herd sizes, improved access to milk, and higher *gu* rainfall totals that regenerated pasture and water. Similarly, East Golis Pastoral livelihood zone of Bari is likely Stressed (IPC Phase 2) due to supplementary cash income obtained from frankincense labor and product sales.

Almost all poor households in agropastoral livelihood zones have depleted their own cereal stocks and have been purchasing food from the market throughout the agricultural lean season, which overlaps the *gu* rainfall season from April to June. However, their income from agricultural labor is also significantly below normal, making it difficult to purchase their minimum food needs. Furthermore, purchasing power has declined due to both high cereal prices and declining labor demand and wages. As a result, most agropastoral areas in southern and northwestern Somalia are in Crisis (IPC Phase 3).

Food security outcomes in riverine areas are more varied, driven by rainfall performance and access to irrigation, levels of conflict and insecurity, carryover stocks from the *deyr* off-season harvests, and the local availability of fish and wild foods. Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are likely in riverine areas of Lower and Middle Juba and Middle Shabelle, where households have local maize and cowpea crops from *deyr* off-season harvests, some access to seasonal fish and wild foods, and some agricultural labor income. However, high food prices and significant displacement have elevated the population in Crisis (IPC Phase 3), especially in Jamaame district of Lower Juba. In riverine areas of Hiiraan and Gedo, Crisis (IPC Phase 3) outcomes are likely due to significant losses in agricultural labor income and crop production, caused by low river water levels and suspension of irrigation. In riverine areas of Lower Shabelle, Stressed (IPC Phase 2) outcomes with households in Crisis (IPC Phase 3) are likely. Although households have poor access to irrigation, the start of the *hagaa* showers offers some relief for crop growth, and households are also benefitting from the local citrus fruit harvest, which provides income from sales and labor. Seasonal fish and wild food availability are also mitigating worse outcomes.

Assumptions

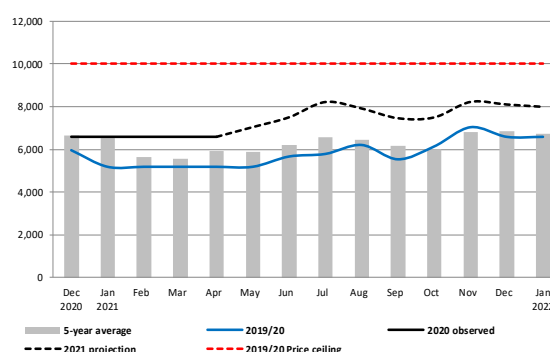
The most likely scenario from June 2021 to January 2022 is based on the following national-level assumptions:

- According to the NOAA/CPC and WMO forecasts, the June to August coastal *xagaa* rains in Lower and Middle Shabelle, Lower Juba, and parts of Bay and Middle Juba regions are most likely to be below the 40-year average. Poor *xagaa* rainfall will likely constrain water and pasture availability and negatively affect the growth of late-planted and off-season crops. In the rest of Somalia, windy, dry, and hotter-than-normal temperatures are forecast during the July to September *xagaa* season, accelerating water and pasture depletion.
- Based on findings from FSNAU's preliminary *gu* field assessments, the main season *gu* cereal harvest in July is projected to be at least 30-40 percent below the long-term average. A larger deficit is possible, pending the findings of the post-*gu* field assessment in July. The off-season *gu* harvest in Lower and Middle Shabelle, Lower Juba, and parts of Bay and Middle Juba in August/September will also be below average since below-average *xagaa* rainfall increases the likelihood of pests and crop moisture stress.
- In riverine areas of the South, the off-season *gu* harvest is most likely to be below average. Although mid-season rainfall increased river levels, soil moisture is low due to hot temperature and winds. Continuous irrigation will be required from May to August, significantly increasing the costs of production. Although agricultural labor demand will likely seasonally rise through September, labor demand is expected to be below normal.
- According to the NOAA/CPC NMME and WMO forecasts, the July to September *karan* rains in northwestern Somalia are expected to be above the 40-year average. In northwestern agropastoral areas that cultivate *gu/karan* crops, the maize harvest in July is expected to fail due to delayed planting and poor performance of the *gu* rains. However, the long-cycle sorghum harvest in October/November will likely be near average based on the favorable *karan* forecast.
- Based on ongoing desert locust hatching and band formation in northwestern Somalia, presence of mature swarms in northeastern Somalia, and recent rainfall that is conducive to breeding, there remains a risk of some damage to *gu/karan* crops in the Northwest and damage to green pasture in northern and central Somalia. However, control operations in the Northwest and progressively dry conditions in northeastern and central Somalia from July to September will likely continue to mitigate the situation.
- In riverine areas of the South, the off-season *gu* harvest is most likely to be below average due to low river water levels and due to above-average temperatures and hot winds during the *hagaa*. Continuous irrigation will be required

from May to August, increasing production costs. Although labor demand will seasonally rise until through the off-season harvest in September, labor demand will be lower than normal.

- According to the IRI/CPC ENSO forecast, there is a greater than 50 percent probability that weak La Niña conditions will re-emerge in late 2021. Consequently, the NOAA/CPC NMME and WMO forecasts indicate moderately below-average rainfall during the October to December *deyr* season. Uncertainty exists due to the long-term nature of the forecast, but the forecast of below-average rainfall elevates the likelihood of a three-season drought, particularly in southern and central Somalia.
- Based on below-average *gu* crop production prospects and below-average *deyr* rainfall, agricultural labor demand is expected to remain below normal in most cropping zones through January 2022.
- To take advantage of high and rising cereal prices, farmers in most agropastoral areas in southern and central Somalia are expected to utilize debt/credit options to increase cereal cultivation during the October to December 2021 *deyr* season. Farmers will also likely increase second planting of sesame in December to January.
- Water shortages and significant pasture and browse deficits are likely to occur in central and northeastern Somalia as the dry season progresses through September. Relatively better availability is likely in the South, where total rainfall amounts and replenishment of vegetation during the *gu* was higher. From October to January, vegetation and water will likely be below normal due to below-average *deyr* rainfall. In the Northwest, however, the anticipated, above-average *karan* rains will likely enhance resources in Northwestern Agropastoral and West Golis Pastoral zones.
- Based on breeding cycles, livestock health, and conception rates in preceding seasons, low to medium levels of camel and cattle calving are expected through July, with the lowest levels occurring in central, northeastern, Bakool, Lower and Middle Shabelle, and Gedo regions. Due to current supportive rangeland conditions that permitted conceptions during the 2020 *gu*, medium to low levels of goat/sheep births are likely in late October and November.
- Overall, livestock health and body conditions are expected to range from near normal to below normal, with the worst-affected livestock likely to be located in parts of central and northeastern Somalia. Based on the likelihood of multi-season drought in rainfall-deficit areas, atypical livestock migration and atypical livestock deaths are anticipated in several pastoral areas of northern and central Somalia during the 2021 *hagaa* and start of the 2021 *deyr*.
- Milk availability will most likely remain below normal through January across much of the country, despite the typical seasonal peak in June/July and Oct./Nov. Exceptions include areas where water and pasture availability is higher, such as riverine areas, parts of Bay, Hiiraan, the Jubas, and parts of the Northwest.
- Based on below-normal water regeneration and the likelihood of accelerated water depletion during the dry season, an earlier-than-normal start of household reliance on water trucking is expected in northeastern and central regions. Based on past trends, prices will likely rebound from June through September and remain above average in most markets. In the South, where water availability is somewhat higher, livestock are likely to congregate near manmade water sources (boreholes and shallow wells) where pasture is typically more scarce.
- Based on FEWS NET's price projections for the reference markets of Baidoa and Qorioley, retail maize and sorghum prices – the main staple foods in southern Somalia – are projected to remain well above the five-year average through the end of 2021. In Baidoa, sorghum is projected to range from 10 to 25 percent above average, peaking at around 8,000 SOS (USD 0.32) in July and Nov./Dec (Figure 8). In Qorioley, maize is projected to range from 30-60 percent above average, peaking in July at around 9,950 SOS (USD 0.40). Local price dynamics are driven by below-average domestic *gu* and *deyr* cereal production. In the Northwest, local sorghum prices are similarly expected to remain above average until the November *karan* harvest, with steeper increases mitigated by imports from Ethiopia.
- According to FEWS NET's integrated analysis, the agricultural daily labor wage is likely to remain below average in agropastoral areas due to below-average *gu* and *deyr* crop production. FEWS NET projects that the labor wage in

Figure 8. Observed and projected price of a kg of sorghum in Baidoa, Bay region, December 2020-January 2022 compared to last year and the five-year average



Source: data from FSNAU, projection by FEWS NET

Walamoy of Middle Shabelle, for example, will range from 20 to 30 percent below the five-average through January, fluctuating between SOS 43,000 and SOS 52,000.

- Imported commodity prices are likely to increase moderately through at least September, driven both by a typical, seasonal decline in international imports during the mid-year monsoon season and by rising international food and fuel prices. Although the expectations of below-average 2021 harvests in Somalia will likely encourage more cross-border imports from Ethiopia to central and northern Somalia, import volumes are too low to have a significant effect on staple food prices. Following the end of the monsoon winds, the seasonal increase in imports may somewhat alleviate prices, but prices will most likely trend average to slightly above average through the end of 2021.
- Based on FEWS NET's price projections for the reference markets of Galkacyo, Burao, and Baidoa, the price of a local goat is projected to remain above the five-year average but similar to last year through the end of 2021, driven by low market supply and seasonally high demand from May to September. Goat prices are expected to be highest in northeastern and central Somalia, ranging from 50-70 percent above average, while northwestern and southern Somalia are likely to see prices range from 10-20 percent above average. Despite favorable market prices, the health and saleability of livestock will remain a limiting factor for poor households.
- According to the Somalia Food Security Cluster and information from OCHA on secured funding, funding for humanitarian food assistance plans is not available and district-level targeting has not been confirmed. As a result, this scenario does not consider the impact of food assistance from July through January.
- Based on President Farmaajo's retraction of plans to extend his term by two more years, and steady progress towards elections scheduled to take place in August 2021, the immediate risk of widespread political violence and/or civil war in Mogadishu has declined since April 2021. However, based on current trends following the repositioning of Somali National Army (SNA) forces towards Mogadishu to support election-related activity and al-Shabaab's stated intention to disrupt election activities, it is expected that the level of al-Shabaab attacks against SNA and African Union Mission to Somalia (AMISOM) bases in southern and central rural areas and against government and security targets in Mogadishu will increase. Small-scale attacks will likely continue in contested territories in Lower and Middle Shabelle, Lower and Middle Juba, Bay, Bakool, Hiiraan, Gedo, Galgaduud and south Mudug regions, resulting in continued loss of life, displacement, disruption to livelihoods, and restrictions on access to trade and humanitarian assistance.

Most Likely Food Security Outcomes

Pastoral areas: In the absence of humanitarian assistance, Crisis (IPC Phase 3) outcomes are expected to become widespread in most pastoral areas during the July to September dry season. Herd sizes increased only slightly during the *gu* season in most livelihood zones and stagnated in Addun Pastoral, Coastal Deeh Pastoral, and the region of Gedo. Given low herd sizes, debt accumulation, and high expenditures on animal feed, water, and migration costs, most poor pastoral households are unable to fully cover their food and essential non-food needs. It is likely that a notable share of income from livestock sales that occur during the peak period of demand for *haji* restocking (June to August) will be used to repay debts. At the same time, milk consumption and sales will largely decline, and other income sources remain too low to cover the cost of rising cereal prices. In the few pastoral areas where Stressed (IPC Phase 2) are expected to be maintained – including East Golis of Bari region, West Golis Pastoral, Juba Cattle Pastoral, and parts of Southern Inland Pastoral – livestock herd recovery has been stronger since 2016/2017. Although milk availability is still lower than normal and livestock production costs have increased, most households will be able to cover their food needs due to the high livestock-to-cereals terms of trade.

Crisis (IPC Phase 3) outcomes are expected to persist from October to January in most pastoral areas. Medium to low births will not adequately offset livestock offtake during the dry season, and livestock holdings will remain below normal. Furthermore, household debt levels are likely to remain high due to increased food, animal feed, water, and migration purchases on credit during the multi-season drought. However, the below-average *deyr* rains should provide marginal relief for livestock health, allowing poor households to sell an additional 1-2 gifted livestock towards the end of the year and consume or sell some milk. Nevertheless, it is likely that poor households will reach a point where they are unlikely to sell additional livestock, as doing so would reduce their remaining livestock assets to unsustainable levels and lead to destitution. As a result, many households will likely experience food consumption gaps indicative of Crisis (IPC Phase 3). However, marginal improvement is expected in parts of the Northwest and in central Hawd Pastoral livelihood zone, where Stressed (IPC Phase 2) outcomes are most likely. In these areas, the onset of the *deyr* rains and expected birth of an average of 6-10 goats is expected to permit a seasonal increase in income from livestock sales as well as an increase in milk consumption.

Agropastoral areas: Crisis (IPC Phase 3) outcomes are likely to persist in most agropastoral areas from June to September,

driven by the significantly below-average availability of household and market stocks from the 2021 *gu* cereal harvest, the reduction in agricultural labor income and income from crop and fodder sales, and rising food prices. Household food stocks are expected to be adequate for only one to two months in most livelihood zones, and localized areas will likely harvest even less or experience crop production failure, leading to an increase in the number of households in Emergency (IPC Phase 4). Areas of greatest concern include Bay Bakool Low Potential, Cowpea Belt, Northwestern, Southern Rainfed Agropastoral, and Togdheer Agropastoral livelihood zones, where this will be the third consecutive below-average *gu* season. In Togdheer Agropastoral, where the *gu* harvest has failed, the severity of the impact will be partially mitigated by near-normal grass fodder production, which requires less rainfall and provides poor households with labor income.

Crisis (IPC Phase 3) outcomes are also expected in southern agropastoral livelihood zones from October to January, which overlaps the agricultural lean season. Households will not have any remaining own-produced cereal stocks and will be purchase dependent, while high food prices will push household purchasing power below normal levels. However, during this time, the availability of some agricultural labor income and the consumption and sales of milk will stabilize the food security situation and prevent more severe deterioration in outcomes. *Deyr* green crop harvests will not become available until late December, pending the start of the rainfall season, and harvests will likely be below average, only marginally mitigating food deficits. However, the anticipated *karan* harvest in Northwestern Agropastoral livelihood zone in November is anticipated to drive more notable improvement in food availability and access from Crisis (IPC Phase 3) to Stressed (IPC Phase 2).

Riverine areas: Overall, most areas in the Riverine Pump Irrigation livelihood zone (Hiiraan and Gedo) and the Riverine Gravity Irrigation livelihood zone (Juba and Shabelle regions) are expected to face Crisis (IPC Phase 3) outcomes through January. Poor *gu* rainfall and extremely limited access to irrigation is expected to result in a significantly low to failed *gu* main season harvest in July and below-average off-season harvest in September among poor households, with reduced prospects for recessionary cultivation. However, during the off-season and during the *deyr* season, more severe deterioration in acute food insecurity will likely be mitigated by the peak availability of wild foods income from agriculture labor, since middle and better-off households will likely be able to afford irrigation activities and will continue to cultivate throughout the *hagaa* season. Poor households are also expected to supplement their income by engaging in distressed livestock sales, eroding their coping capacity as they have few livestock, and seek social gifts and food loans. Food security outcomes will be most severe in Riverine Gravity Irrigation livelihood zones in Middle Shabelle and Lower Juba, where the main *gu* harvest is marginal. Crisis (IPC Phase 3) outcomes are expected, and some households may be in Emergency (IPC Phase 4).

In contrast, households along the Shabelle River in Lower Shabelle region and parts of Middle Juba region are expected to sustain Stressed (IPC Phase 2) outcomes through January. These areas rely more heavily on cash crop production, and the below-average *hagaa* showers are anticipated to sustain minimally adequate river water levels for cash crop production. In Lower Shabelle, in particular, poor households are expected to access minimally adequate agricultural labor income and will be able to meet their minimum food needs with the use of stressed coping strategies, such as purchasing food or inputs on credit. In Middle Juba, increasing income from fodder sales and declining milk prices as a huge influx of livestock entering into the riverine area will play a role in maintaining Stressed (IPC Phase 2) outcomes. However, in both areas, an atypically high number of households will likely be in Crisis (IPC Phase 3).

Urban IDP settlements and urban areas: In the absence of planned assistance, widespread deterioration to Crisis (IPC Phase 3) is expected in urban IDP settlements and urban areas. The decline of economic activities, 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 local cereal prices and below-normal daily income is most likely to drive an increase in the number of households experiencing acute food insecurity.

Events that Might Change the Outlook

Table 1. Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Bay Bakool Low Potential Agropastoral, Addun Pastoral, and Coastal Deeh Pastoral livelihood zones	Significantly below average to failed <i>deyr</i> rains	In agropastoral areas of Bay and Bakool, poor to failed production, significantly below-average labor income, and steep increases in staple food prices would be likely. To cope, households would likely liquidate livestock assets to repay debts and purchase food and seek food gifts. Displacement due to drought would also be possible. A prolonged period of purchasing food on credit would also lead to increased difficulty accessing credit to purchase food. Without food assistance, Emergency (IPC Phase 4) would be possible.

		Well below average or failed rainfall <i>deyr</i> rainfall in Addun Pastoral and Coastal <i>Deeh</i> Pastoral livelihood zones in central Somalia would likely lead to increased livestock culling, miscarriages, and limited livestock conceptions. Poor households would have little to no access to milk for consumption or sales and few to no saleable livestock to sell to purchase food and repay debts. Further pastoral destitution and displacement would be likely. Without food assistance, these areas would deteriorate to Emergency (IPC Phase 4).
Pastoral areas in northern and central Somalia	Average <i>deyr</i> rainfall from October to December	Pasture and water resources would improve more significantly, improving livestock body conditions, productivity, reproductivity, and value. Poor households herd size will likely increase improving access to saleable animals. Livestock prices and milk sales income would improve, and with the expected stability of imported commodity prices, the ToT would improve. However, due to the extended impacts of previous droughts, poor households would need to sell some of their productive livestock to repay debts and it is expected the food consumption gaps would still exist as they will continue credit food purchase. Due to low livestock holdings, Addun pastoral of Central and Coastal <i>deeh</i> pastoral livelihood zone would remain in Crisis (IPC Phase 3) while the rest would improve to Stressed IPC Phase 2).
Urban areas and IDP settlements	Spread of COVID-19 variants leading to renewed COVID-19 restrictions	Internal remittance flows, diaspora investments, exports, and food imports would likely decline significantly, escalating imported food prices, reducing labor demand and income, and reducing food access. Although Crisis (IPC Phase 3) outcomes would likely be sustained in urban areas, an atypical increase in the share of the urban population in Emergency (IPC Phase 4) would be likely. IDP households in urban areas would be more affected, given fewer income sources, sensitivity to price shocks, and low coping capacity. Most urban IDP settlements would likely deteriorate to Emergency (IPC Phase 4).
Mogadishu, Bay, Bakool, Shabelle, Gedo regions	Delays or changes to planned elections, with outcomes that lead to increased conflict (<i>election is planned to happen in October</i>)	Any undesired delays or violations to the election schedule coupled with disagreements on the outcome of the electoral process will likely re-escalate tensions and increase political violence to levels observed in April 2021, driven by clan-based schisms among federal security forces and a suspicion from his opponents that President Farmaajo does not intend to oversee free and fair elections. Such a re-escalation in political tensions and violence would primarily impact Mogadishu, cause displacement, casualties and loss of livelihood assets, market and trade disruptions, and lapses in the provision of security services and humanitarian assistance. In a worst-case scenario, all markets, Mogadishu port, and airports would be closed, food prices would escalate, and trade movements between the port town and Bay, Bakool, Gedo, Hiraa and Shabelle regions would be suspended. Under this scenario, significant population movement/displacement out of Mogadishu to other areas of relative safety is likely. As a result, poor and lower-middle households would likely experience widening food consumption gaps, with a significant increase in the population in Emergency (IPC Phase 4) expected.

AREAS OF CONCERN

Bay Bakool Low Potential Agropastoral Livelihood Zone (Figure 9)

Current Situation

Below-average and poorly distributed rainfall during the April to June *gu* season has led to crop production losses, reduced agricultural labor demand, and rising cereal prices in Bay Bakool Low Potential Agropastoral livelihood zone. In the northern and central part of the livelihood zone, rainfall deficits ranged from 25 to 100 mm below the historical average, with most rainfall accumulating between late April and early May. Consequently, the growing season was much shorter than normal. In southern Bay, heavy rainfall in late June eased deficits to result in near average totals, but the rain occurred too late to recover stressed and wilted crops from the impact of the earlier dry spell. Overall, remote sensing imagery suggests cropping conditions – as measured by the Water Requirement Satisfaction Index and Soil Water Index – are poor to failed in Bakool region and mediocre to poor in most of Bay. Field reports indicate significant losses in both regions.

Poor households' ability to purchase food is significantly affected by the loss of agricultural labor income and related reduction in purchasing power. In this livelihood zone, poor households typically earn 35-50 percent of their annual income from agricultural labor during the *gu* and *deyr* seasons and off-farm labor, such as portage and construction, during the dry seasons. Given limited own-produced stocks, they typically purchase most of their food between the *gu* and *deyr* harvests. Given the May dry spell and early end of the season, labor demand for weeding and harvesting is well below normal.

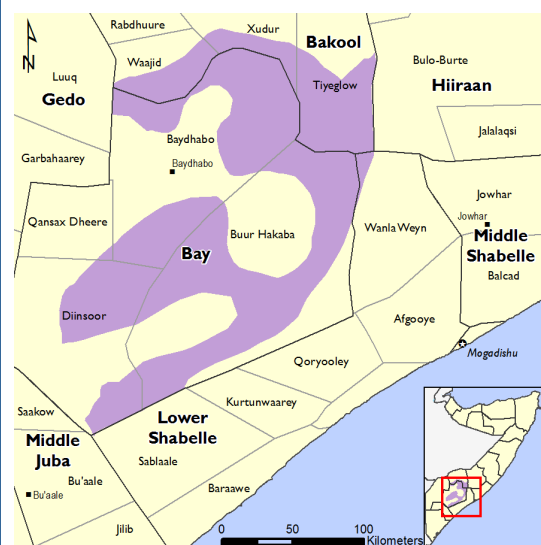
Additionally, local cereal prices are above average due to below-average domestic crop production in 2020. In May, the retail price of a kilogram (kg) of sorghum in Baidoa was 6,960 SOS, which is 34 percent above May 2020 and 18 percent above the five-year average. In Bakool, the price of a kg of sorghum in Xudur was 13,500 SOS, which is 29 percent above last year and similar to the five-year average. As a result, household purchasing power as measured by the amount of sorghum purchased with the daily labor wage was only 14 kg in Baidoa, Bay, in May, which is 26 and 30 percent below May 2020 and the five-year average, respectively. Although the terms of trade in Xudur, Bakool, is near the five-year average at 9 kg, the value is among the lowest in the region due to the detrimental effects of conflict and insecurity on local market supply in Bakool. Further, the value in Xudur has declined by 25 percent compared to May 2020.

Livestock production conditions are adequate, and the livestock-to-cereal terms of trade remain favorable. However, poor households have low livestock holdings consisting of around five cattle and 5-6 goats, and this source of income is too small to compensate for the loss of labor income. Rainfall was minimally adequate to refill seasonal water catchments, which reduced water prices and alleviated household spending on water-trucking operations that had commenced during the *jilaal* season. Currently, pasture availability as measured by satellite-derived data is below the historical median but is still minimally adequate to maintain average to good livestock body conditions. Based on preliminary information from the FSNAU mid-*gu* field assessment, favorable rangeland conditions have supported medium livestock births and conceptions, providing some milk for the household. The amount of sorghum that can be purchased with the sale of a local quality goat remains quite high in Baidoa at 174 kg per goat and at a fair level in Xudur at 88 kg per goat as of May. This trend is mainly driven by the low livestock supply in Somalia since the 2016/2017 drought, which has maintained high livestock prices. While favorable, the terms of trade have nonetheless fallen by 22 percent in Baidoa and 20 percent in Bakool compared to May 2020 because of the increase in the price of local sorghum. Cattle are not usually sold but are kept for milk production.

Both the impacts of poor rainfall and conflict and insecurity continue to drive cycles of displacement and disrupt livelihood activities and trade, among other issues. Key informants report that some previously displaced households that returned to their areas origin to plant for the *gu* season have already returned to displacement sites due to the failure of their crops. Meanwhile, according to monthly displacement data from the Protection and Return Monitoring Network (PRMN), an estimated 66,000 people have been displaced through May 2021 from Bay region due to conflict/insecurity (80%) and drought (18%). Most households were displaced (88%) within the region, while the remainder migrated to other regions, including Middle and Lower Juba, Banadir, and Bari. In Bakool, a total of 7,000 people have been displaced, roughly equally driven by insecurity and drought. About 71% of displacement occurred within the region, while the remainder moved to other regions, including Bay, Gedo, and Hiiraan. Furthermore, according to UN OCHA's Somalia Humanitarian Bulletin for May, "conflict-related displacement has escalated with an estimated 4,950 households (29,700 people) displaced to Xudur town in Southwest State following a directive from non-state armed actors to vacate 42 villages surrounding the town."

Amid worsening trends in the drivers of food insecurity, the distribution of humanitarian food assistance has declined significantly since the beginning of 2021. According to distribution data from the Somalia Food Security Cluster², an average of 23,320 people received assistance in Bakool region (8 percent of the regional population) and an average of 156,300 people received assistance in Bay region (18 percent of the regional population) monthly from March through May. The level of assistance is below the population projected to be in Crisis (IPC Phase 3) or worse, which is 18 percent of the Bakool population and 25 percent of the Bay population, according to the [January 2021 Somalia IPC](#). The level of assistance also represents a significant decrease compared to January, when 65,240 people in Bakool and 260,147 people in Bay received assistance. Additionally, most of the population that receives this assistance is concentrated in the districts of Baidoa in Bay and Xudur in Bakool. Due to humanitarian access constraints, less than 15 percent of the population in other districts of Bay

Figure 9. Area of concern reference map: Bay Bakool Low Potential Agropastoral livelihood zone



Source: FEWS NET and FSNAU

² Food assistance distribution data is only available at the regional and district level, and not at the livelihood zone level.

and less than 5 percent of the population in other districts of Bakool have received assistance. .

Due to the above factors, food insecurity has significantly deteriorated within Bay Bakool Agropastoral livelihood zone since January, and Crisis (IPC Phase 3) outcomes are likely occurring in June. In December, food security data collected in this livelihood zone during the FSNAU post-*deyr* household survey converged to Stressed (IPC Phase 2). However, 12 percent of households were experiencing moderate hunger (HHS=2-3) and, given the depletion of household food stocks, loss of labor income, and declines in the labor-to-cereals terms of trade and levels of food assistance since January, it is likely that the share of households experiencing moderate hunger or utilizing crisis livelihoods coping strategies to maintain minimally adequate food consumption has increased to significant levels. For example, there are key informant reports that poor households have relocated to main towns in search of income-earning opportunities and social and humanitarian support due to the lack of food and income sources in their villages. Most concerning is the number of reports of household displacement related to drought, which reflects the lack of coping capacity among the poorest households.

Assumptions

In addition to the national assumptions listed on pages 7-9 of this report, the most likely scenario for Bay Bakool Low Potential Agropastoral livelihood zone is based on the following assumptions:

- Similar to other southern agropastoral areas, below-average and erratic gu rainfall and anticipated below-average *hagaa* rainfall (typically received in the southern part of the livelihood zone) is expected to result in a significantly below average gu harvest in July. Relatedly, seasonal agricultural labor demand and income will remain below normal through July.
- Similar to other southern agropastoral areas, anticipated below-average *deyr* rainfall is expected to lead to a third consecutive season of below-average crop production in January 2022. Based on past trends, agricultural labor demand and income are expected to be normal during the land preparation and planting period in September and October, since farmers will purchase inputs on credit or loans. However, labor demand and income for weeding and harvesting from November to January will most likely be below normal.
- Based on FEWS NET's integrated price projection utilizing historical price data in Baidoa, the retail price of sorghum is expected to range between 7,050 and 8,230 SOS/kg, which is approximately 15-30 percent above the 2020 average and 15-25 percent above the five-year average. Prices are likely to peak in July, then moderately decline with the gu harvest, and then rise and peak again in December prior to the *deyr* harvest in January.
- Based on past trends observed in multi-season droughts, the monthly level of internal displacement from rural areas to main towns will likely be atypically high, driven by the loss of household food and income over three consecutive seasons.

Most Likely Food Security Outcomes

Significant reductions in household income from agricultural labor and household food stocks for consumption from gu crops, followed by a third consecutive season of below-average crop production in late 2021/early 2022, will be the main driver of sustained Crisis (IPC Phase 3) outcomes. The July harvest will offer most poor households less than two months of food stocks for food and income, a portion of which will go toward repayment of debt that households accumulated to purchase inputs for cultivation or purchase food and non-food needs. From August to December, the main source of food will continue to be the market. Yet, cereal prices are expected to reach up to 25 percent above the five-year average, and poor households have limited sources of income, especially during the dry season. Below-average wage rates and high cereal prices will likely continue to undermine household purchasing power, even in September/October when labor demand for *deyr* planting is at its peak. Some households may opt to sell a few of their few goats in order to purchase food, but this will constitute accelerated depletion of assets given the small size of their herds. Finally, community and kinship support, such as livestock and crop *zakaat*, will be limited given that consecutive, below-average crop production seasons have also reduced the capacity of middle and better-off households to offer cash and in-kind gifts to the poor. In the absence of food assistance, most poor households will likely experience food consumption gaps or engage in livelihoods coping indicative of Crisis (IPC Phase 3) throughout the scenario period. Some of poorest households, including those who become displaced by drought or conflict, may be in Emergency (IPC Phase 4). Food insecurity will peak from September to December, during the extended agricultural lean season. Marginal improvement is likely in July and January with the *gu* and *deyr* harvests, respectively.

Addun Pastoral Livelihood Zone (Figure 10)

Current Situation

Drought conditions from late 2020 through April 2021 led to significant livestock production losses in this livelihood zone, where poor households' herds had yet to fully recover from the impacts of the 2016/2017 and 2018/2019 droughts. Low pasture availability, water scarcity, and above-average temperatures marked the January to March *jilaal* dry season, which persisted into late April due to the delayed onset of the 2021 *gu* rains. Many households reported an atypical number of livestock deaths among their herds between early March and late April, especially young or newborn kids and lambs. Many households also sold more livestock than usual to offset the heightened costs of fodder, water, and migration and to repay debt accumulated for essential food and non-food expenses. As a result, the average livestock holding reported by poor households in focus group discussions is around 31 sheep and goats, which is 46 percent below baseline (2010) levels. Most of the herd consists of immature animals and lactating or recently conceived female livestock, which are not typically sold.

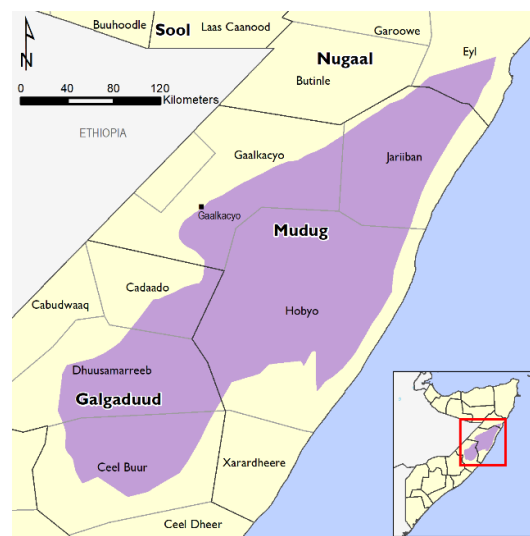
The delayed onset of the 2021 *gu* rains in late April brought some relief, but the early end of the rains in May have again led to below-normal rangeland conditions. Rainfall totals were minimally adequate to alleviate the severity of water shortages in May and June, regenerate some pasture and browse, and support some recovery in livestock health. However, water availability and vegetation vigor remain below normal levels based on field information and remote-sensing data. Pasture losses have been further exacerbated by the persistent presence of desert locusts. In May, the price of one drum of water was 27,500 SoS in Gaalkacyo and 30,000 SoS in Dhusamareb, which is 35 and 45 percent above the five-year average, respectively. Most households have depended on water trucking to a varying degree since mid-February.

Livestock body conditions exhibit an improving trend in June, but household income from livestock sales and household milk consumption are below normal due to the impacts of poor rainfall on livestock herd sizes and reproductive cycles. Typically, households need to sell 6-11 goats annually. However, livestock births were limited in the 2021 *gu* due to the low level of conceptions during the preceding, below-average 2020 *deyr* rains as well as livestock losses during the 2021 *jilaal*. Conceptions in the current season are also estimated to be limited. Under these conditions, poor households sold more livestock than they usually would as a coping strategy to purchase food and non-food needs. Although individual sale values depend on the health and quality of the livestock for sale, especially in a drought year, the average market price of a goat remains favorable and above average due to low market supply. In June, a local quality goat in the main market of Dhusamareb in Galgaduud sold for SOS 1,145,000, which is 19 and 16 percent above five-year averages, respectively. Similar improvements were observed in other rural markets.

Above-average livestock prices have kept pace with the rising price of imported rice, which is the main staple food consumed in this livelihood zone; however, as noted above, the main constraint to household food access is the limited number of saleable livestock. Pastoral households in Addun Pastoral livelihood zone typically purchase 80 percent of their food. In May, the price of a kilogram of rice rose to 26,600 SOS/kg in Dhusamareb, reflecting a 40 percent increase since February, 20 percent increase compared to May 2020, and 27 percent increase compared to the five-year average. The sharp increase is mainly due to increasing international food and fuel prices. Despite stability in the goat-to-rice terms of trade, which are near average at roughly 50 kg, poor households have faced the difficult choice between safeguarding the long-term viability of their herds and meeting the short-term necessity of purchasing their immediate food needs and adequate water and fodder to maintain livestock health in dry conditions.

Other sources of income remain limited, while household debt levels remain above normal. Income from casual labor and self-employment activities (e.g., the sale of bush products) and cash and in-kind gifts received during *Ramadan* and *Eid-el-Fitr* are not adequate to fill the gap left by lost income from livestock production. Consequently, the estimated average debt held by a poor household is around USD 500-600 compared to a typical level of USD 200-300. Typically, household debt is at least partially repaid with livestock sales after the rainy season, but most poor households accrued further debt during the

Figure 10. Area of concern reference map: Addun Pastoral livelihood zone



Source: FEWS NET and FSNAU

jilaal dry season in order to cover increased expenditures on animal feed and water. Given increased debt levels and limited ability to repay, access to credit and loans is now limited.

Given the unforeseen severity of the *jilaal* in this livelihood zone, planned levels of food assistance to Galgaduud and Mudug regions have likely not kept pace with the population that is need of food assistance. Previously, an estimated 20-30 percent of the regional population was projected to be in Crisis (IPC Phase 3) or worse, according to the January 2021 Somalia IPC estimates. This figure is now likely higher. According to food assistance distribution data from the Somalia Food Security Cluster, humanitarians reached 21 percent of the regional population in Galgaduud and 20 percent of the regional population in Mudug with food assistance monthly from March to May. However, assistance is primarily delivered to the main urban centers, including Dhusamareb and Gaalkacyo, and to the districts along the Ethiopian border, which are not located within Addun Pastoral livelihood zone (e.g., Cabudwak and Galdogob). In addition to inadequate funding, food assistance delivery remains constrained by limited humanitarian access, political instability, and chronic clan conflicts.

As result of inadequate income to cover poor households' minimum food needs and essential non-food needs, Crisis (IPC Phase 3) outcomes are likely occurring in Addun Pastoral livelihood zone. In December, food security data collected during the FSNAU post-*deyr* households survey converged to Stressed (IPC Phase 2), with 73 percent of households already engaged in stressed livelihood coping strategies – such as increased debt and above-normal livestock sales in or der to purchase food. Due to the additional loss of livestock since December and reduced purchasing capacity, most poor households likely face at least slight to moderate food consumption gaps.

Assumptions

In addition to the national assumptions listed on pages 7-9 of this report, the most likely scenario in Addun Pastoral livelihood zone is based on the following assumptions:

- Based on current and anticipated below-normal pasture and water availability and the low level of livestock conceptions during the 2021 *gu*, livestock health, births, and milk production are expected to remain below normal. The likelihood of multi-season drought raises the risk of atypical livestock migration patterns in search of pasture and water, with consequences for livestock health and body conditions particularly at the peak of the July to September dry season. Slight improvement in milk availability is anticipated by October, when births usually occur.
- Based on FEWS NET's integrated price projections based on price data from Gaalkacyo markets, the price of a local quality goat is expected to be roughly similar to last year and range up to 60 percent above the five-year average. High goat prices will continue to be driven by low supply coupled with consistent demand.
- Similar to the rest of Somalia, the price of imported rice and other imported commodities, such as wheat flour, will likely increase and remain above average due to rising international food and freight costs and below normal availability of local cereals produced in southern Somalia.

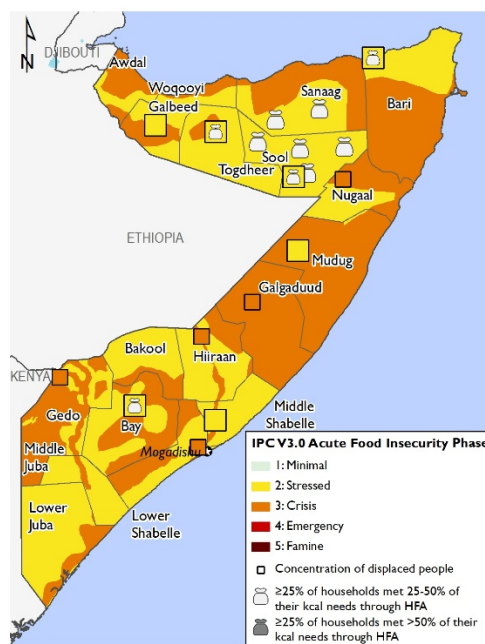
Most Likely Food Security Outcomes

Crisis (IPC Phase 3) outcomes are expected to persist in Addun Pastoral livelihood zone from June to January, driven by the impacts of poor rainfall on livestock productivity, inadequate income from livestock production, and high staple food prices. Although livestock body conditions have recently improved and livestock prices will remain high, few births and low herd sizes will continue to limit household purchasing capacity for essential food and non-food needs in the near term. In the medium term, the anticipated harshness of the *hagaa* dry season, followed by the likelihood of a third below-average rainfall season from October to December, will likely lead to another cycle of increased expenditures on migration, animal feed, and water coupled with declines in livestock health. Consumption of milk at the household level will also remain below normal due to limited births, despite a slight seasonal peak around October/November. Given that poor households typically depend on livestock sales to earn 70 percent of their annual income and purchase up to 80 percent of their annual food needs, the significant loss of income from livestock production cannot be compensated with the few remaining sources of income, such as casual labor, self-employment, and gifts from the community. Furthermore, poor households will face some pressure to pay down existing levels of debt after the next round of livestock births in October/November, though cultural and religious norms will allow some extension of debt repayment until further herd recovery occurs. The lack of income will be exacerbated by the elevated cost of key staple foods, including rice and wheat flour. In the absence of significant food, water, or livelihoods assistance, poor households will likely experience food consumption gaps and seek to fill the gap with food gifts, borrowing or purchasing food on credit, and unsustainable sales of livestock. Based on historical trends, 'Serious' levels (GAM WHZ 10-14.9 percent) of acute malnutrition are likely to be maintained through January.

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

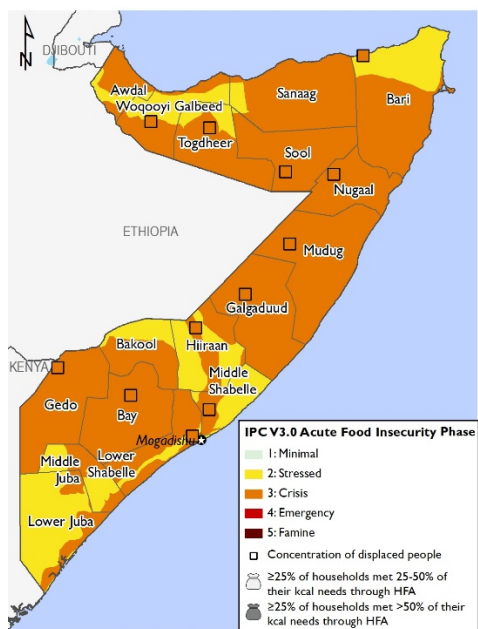
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☐ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian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

Current food security outcomes, June 2021



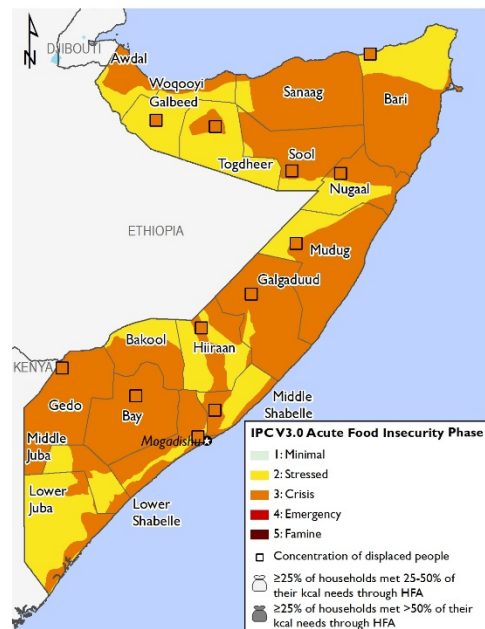
Source: FEWS NET and FSNAU

Projected food security outcomes, June to September 2021



Source: FEWS NET and FSNAU

Projected food security outcomes, October 2021 to January 2022



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.](#)