

SOMALIA Food Security Outlook

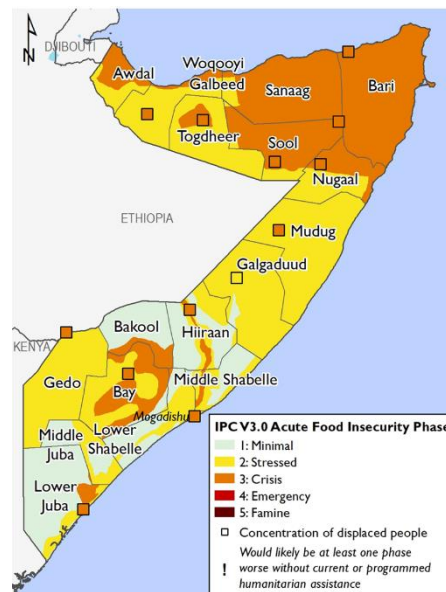
October 2020 to May 2021

Weather shocks, desert locust, and COVID-19 economic contraction lead to Crisis (IPC Phase 3) outcomes

KEY MESSAGES

- Acute food insecurity is expected to remain high in Somalia through May 2021, driven by the varying impacts of localized floods and below-average rainfall, a worsening desert locust infestation in central and parts of southern Somalia, and the economic contraction linked to the COVID-19 pandemic. In late 2020, the population facing food consumption gaps indicative of Crisis (IPC Phase 3) or worse outcomes is likely to reach 2.1 million. In early to mid-2021, the acutely food insecure population is likely to rise over 2.5 million due to the impact of consecutive, below-average rainfall seasons on crop and livestock production. Sustained humanitarian food assistance is required to prevent Crisis (IPC Phase 3) or worse outcomes and protect livelihoods.
- The October to December 2020 *deyr* rainfall season is performing better than previously forecast in central and parts of southern Somalia, but cumulative rainfall in the North and much of the South is below 55 percent of the 30-year average. The rains will mitigate crop losses in southern agropastoral areas and benefit livestock production in south-central pastoral areas, but the likelihood of a third consecutive season of flooding will erode crop production in riverine areas. In the north, livestock production conditions are still favorable but pasture and water will likely become scarce during the January to March 2021 *jilaal* dry season.
- Desert locust hatching and band formation are widespread in central Somalia and swarms are present in Hiiraan, Bay, Bakool, and Middle and Lower Shabelle regions. Significant damage to germinating crops has been reported in these areas, including *Cowpea Belt Agropastoral* and *Bay Bakool Low Potential* livelihood zones. Due to the presence of swarms and reports of breeding in the South at this stage of crop development, as well as the likelihood of erratic rainfall at the end of the *deyr* season, crop and pasture losses from desert locust will be higher than last year. On the other hand, aerial control operations in the Northwest are reducing local swarms. Pasture losses in the North remain localized, permitting opportunities for livestock migration.
- Urban and displaced households across Somalia, as well as pastoral households in *East Golis Pastoral* livelihood zone who heavily rely on frankincense exports, are most affected by the economic contraction linked to the impacts of the COVID-19 pandemic. The pandemic led to a temporary decline in staple food imports and livestock and frankincense exports, curtailed remittances to households and small and medium businesses, and increased unemployment in urban areas. According to the latest World Bank economic forecast, Somalia's economy is expected to rebound in 2021 due to a dollarized economy, low fuel prices, recovery in remittances, and fiscal reforms. However, poor households with limited coping capacity and high vulnerability will likely continue to struggle to meet their minimum food and non-food needs.
- FEWS NET's analysis of historical rainfall performance indicates that [waning La Niña conditions](#) will most likely result in below-average rainfall during the April to June 2021 *gu* season. Due to the cumulative impacts of multiple weather shocks and persistent desert locust infestation, coupled with the ongoing recovery from the 2020 economic contraction, food assistance needs are expected to rise through at least May 2021. Crisis (IPC Phase 3) outcomes are expected in many northern pastoral areas, riverine areas, and several agropastoral areas, as well as in most urban areas and IDP settlements. On the household level, it is likely that some worst-affected households will be in Emergency (IPC Phase 4).

Current food security outcomes, October 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

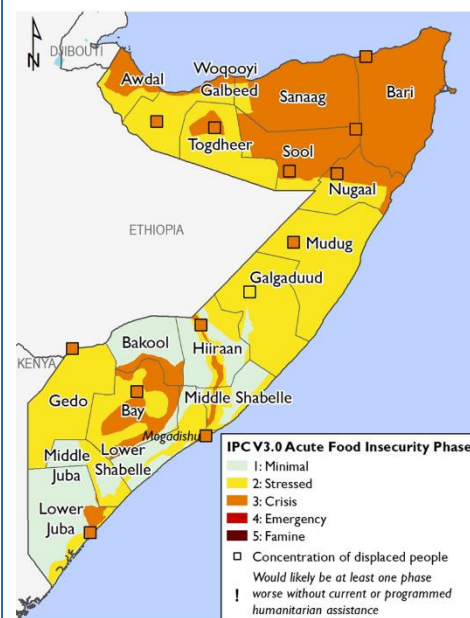
Current Situation

2020 post-*gu* summary: Based on the [post-*gu* IPC analysis conducted in September 2020](#), an estimated 1.7 million people are expected to be in Crisis (IPC Phase 3) and 0.4 million are expected to be in Emergency (IPC Phase 4) in late 2020 in the absence of humanitarian food assistance. An additional 3.0 million people are expected to be Stressed (IPC Phase 2). Food security outcome indicator data collected by FSNAU in June/July among rural, urban, and IDP populations provided evidence of deterioration in food security outcomes compared to the post-*deyr* results of January 2020. While most rural, urban, and IDP populations exhibited outcomes indicative of Stressed (IPC Phase 2), the population experiencing food consumption gaps or using negative coping strategies increased (Figure 1). Global Acute Malnutrition (GAM) measured by weight-for-height z-score (WHZ) was 'Critical' (GAM WHZ 15-29.9 percent) in 7 out of 37 population groups surveyed.

The key drivers of acute food insecurity include recent weather shocks, the socio-economic impacts of COVID-19, and pest infestations in the context of protracted conflict, displacement, and recurrent drought. During the April to June 2020 *gu* rainfall season, severe flooding in riverine areas destroyed off-season and main season crops. Erratic rainfall distribution in agropastoral areas, a bush cricket infestation in the south, and a desert locust infestation in north-central Somalia also led to significant crop losses. Although above-average rainfall from June to September partially offset crop and pasture losses in the Northwest and along the southern coast, total 2020 *gu* cereal production in southern Somalia was approximately 40 percent below the 1995-2019 average (Figure 2). At the same time, the impact of the pandemic led to a slowdown in economic activity marked by a temporary decline in remittances, dip in livestock exports, and short-term spike in imported staple food prices. Finally, conflict has continued to periodically disrupt trade flows, displace households, and interrupt cropping activities. The impact of conflict on cropping activities was highest in Wanlaweyn, Marka, and Qoryoley districts of Lower Shabelle. Despite multiple shocks in 2020, high levels of humanitarian food assistance and government support have played a critical role in preventing worse acute food insecurity outcomes in Somalia.

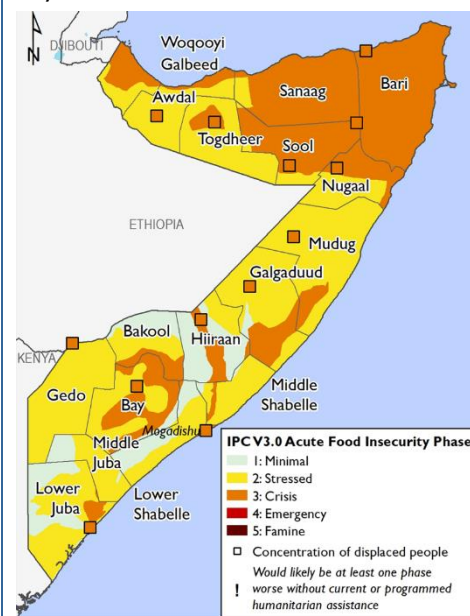
Off-season *gu* and *karan* crop production: In October, multiple agricultural activities are ongoing including the off-season *gu* harvest in riverine areas in the South, the start of the *karan* harvest in northwestern agropastoral areas, and the start of the main *deyr* cropping season. In riverine areas, off-season *gu* production is below average due to multiple flood events since July that inundated tens of thousands of hectares (ha) of farmland and displaced tens of thousands of people. Upstream areas of the Shabelle River are worst affected, along with downstream areas of the Juba River in Jamaame and Kismayo of Lower Juba. In August, for example, floods damaged 15,000 to 20,000 ha of sorghum, maize, and sesame in Hiiraan, of which 80 percent was lost in Beletweyne. Floods also inundated 10,000-12,000 ha in Jowhar and Balcad Districts of Middle Shabelle and in Afgoye of Lower Shabelle. As a result, only 3,560 MT of off-season maize has been harvested in Middle and Lower Shabelle regions. Currently, large areas of farmland remain inundated, which is delaying cultivation for the main *deyr* season. At the end of October, river station data reported by the Somali Water and Land Information Management (SWALIM) system showed a varying risk of flooding along the Shabelle and Juba rivers, including a moderate risk in Jowhar and in Bardheere of Gedo.

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET and FSNAU

Projected food security outcomes, February to May 2021



Source: FEWS NET and FSNAU

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

Off-season *gu* production is performing better in downstream areas of the Shabelle river – specifically in Qoryoley and Kurtunwarrey districts of Lower Shabelle – and in upstream areas of Middle Juba and Gedo. Receding river levels provided improved access to water for irrigation and permitted farmers to plant cash crops, including citrus fruits, and offered poor farmers crop-sharing opportunities and labor income. The harvest began in September, while additional recessionary planting, desilting, and canal rehabilitation activities are underway in preparation for the *deyr*. Poor households in riverine areas as well as in neighboring agropastoral areas are benefitting from an increase in demand for agricultural labor, boosting their income in September and October.

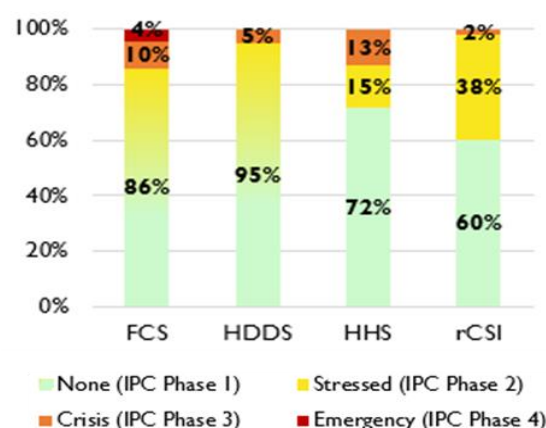
In northwestern agropastoral areas, prospects for the short-cycle maize and sorghum harvest in November have significantly improved. Earlier this year, planted area was low since farmers were fearful of desert locust. However, cumulative *karan* rainfall ranged from near average to 200 percent above average from June to September, improving crop yields and encouraging late planting of short-cycle crops. As a result, the sorghum and maize harvest in Northwestern Agropastoral livelihood zone is likely to be higher than previously projections, which predicted a shortfall of 45 percent compared to the 2010-2019 average. However, an updated estimate is currently unavailable. Similarly, rainfall supported ratooning of sorghum and grass in Togdheer Agropastoral livelihood zone, mainly for livestock fodder.

2020 *deyr* rainfall performance: To date, *deyr* rainfall performance is mixed across the country. Strong La Niña conditions are driving delayed and below-average rainfall in the North and parts of the South, including in the Northeast where previous forecasts had predicted average rainfall. In contrast, rainfall began early and is above average in central Somalia, which is better than previously forecasted and may reflect the influence of the transition from a negative to neutral Indian Ocean Dipole. According to satellite-derived data in late October, *deyr* rainfall is less than 55 percent of normal across the Northwest, most of the Northeast, and in Gedo and Lower Juba in the South (Figure 3). However, it should be noted that Guban Pastoral livelihood zone does not usually receive *deyr* rainfall and field reports indicate the area received localized, light precipitation in early October. Meanwhile, *deyr* rainfall was near average in the rest of the South and ranged from near average to 200 percent above average in central regions. Despite cumulative average performance, field reports indicate the *deyr* rains were delayed in most southern agropastoral areas with erratic distribution. The key exceptions are Bay and Bakool, parts of Hiiraan, and parts of Shabelle and Gedo, where light to heavy rain is reported.

***Deyr* crop production:** Despite an erratic start of the *deyr* rains, land preparation and planting are ongoing across Somalia's cropping zones. There are reports of extensive land preparation and wet planting of cereals in most southern and central agropastoral and riverine areas. In agropastoral areas, most farmers completed planting and report adequate seed germination has already occurred, while early planted crops are at first weeding stage.

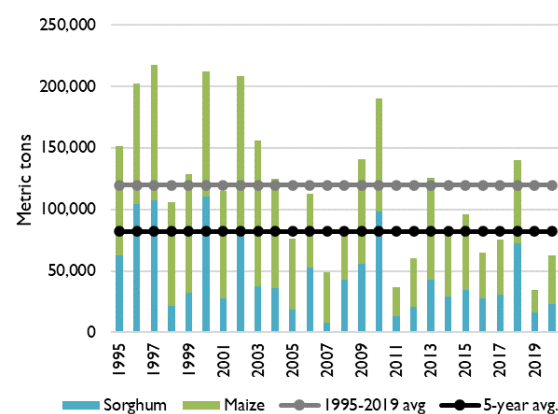
Currently, the risk of desert locust to crop production in southern agropastoral areas is high and rising due to the southward movement of swarms from northern Somalia into Southern through central Somalia. According to FSNAU field analysts and FAO Desert Locust Watch, the desert locust infestation – which was mostly confined in northern and central regions since the beginning of 2020 – has now expanded further to toward the South. Significant damage is reported to early *deyr* crops in Hiiraan and Middle Shabelle regions, while early germinated cowpea and sorghum at seedling stages have been damaged in Cowpea Belt (Hobyo, Xaradheere, Ceeldheer, Ceel-buur; Adend Yabaal of Middle Shabelle; Maxaas/Belet-weyn in Hiiraan and Tieglow and Baidoa districts in Bay).

Figure 1. Percent of rural households in each IPC phase according to IPC thresholds for outcome indicators, based on household survey data collected in July 2020 (n=4,084): Food Consumption Score (FCS), Household Dietary Diversity (HDDS), Household Hunger Score (HHS), and Reduced Coping Strategies Index (rCSI)



Source: FEWS NET and FSNAU

Figure 2. *Gu* main and off-season cereal production in metric tons in southern Somalia, 1995-2020



Source: FSNAU

Livestock production: According to field reports, dry pasture and water availability is broadly sufficient to support healthy livestock body conditions as of late October. However, vegetation conditions are mixed across the country and field information suggests an increasing number of mature desert locust swarms are depleting pasture and browse resources across all livelihood zones (Figure 4). On the one hand, the impact of the above-average *gu* and *karan* rains is still visible in the North, where the satellite-derived eMODIS Normalized Difference Vegetation Index (NDVI) reflects broadly above-normal vegetation (Figure 5). Yet localized deficits are visible in parts of eastern Sool and Sanaag, Qardho and Iskushuban of Bari, and parts of northern Mudug and Galgaduud, where desert locust is accelerating pasture losses. On the other hand, vegetation conditions in central Somalia reflect the mixed impact of the recent *deyr* rains, preceding *xagaa* dry season and expanding desert locust swarms. Finally, vegetation deficits are visible in the South according to both satellite imagery and field reports, reflecting the impact of the dry season and delayed start of the *deyr* rains, as well as localized but significant pasture loss from desert locust in Aden Yabaal district of Middle Shabelle and Maxaas sub settlement of Beletweyne. In Bay, Bakool, Hiiraan, and Middle Shabelle, which received rain in late October, there is a time lag between rainfall onset and pasture regeneration.

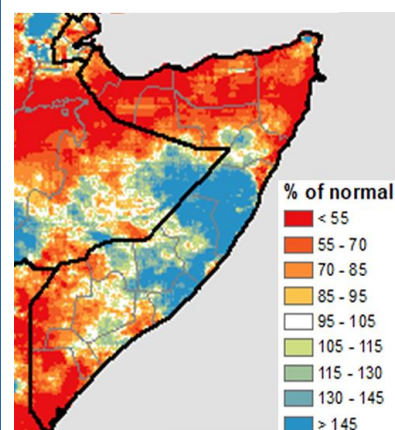
Given the availability of dry pasture, livestock body conditions range from near to above average. Key exceptions are localized areas in the Northeast, including in Bari, Nugaal, and northern Mudug, due to the seasonal decline of pasture during the dry season, poor *deyr* rains, and desert locust. In these areas, livestock body conditions range from near average. Another exception is in Gedo and Middle Juba, where body conditions of small ruminants are average to below average due to below average or dry rangeland conditions. To cope, livestock in these areas have opportunistically migrated to riverine areas to access pasture and water.

At this point in the season, livestock births and milk production are seasonally rising but have yet to reach their peak. In the Northwest, milk production is below average to average due to medium kidding and calving, except Guban Pastoral zone where births are low. In the Northeast and central Somalia, due to the below-average camel calving in the last two seasons, milk production is below average in all livelihood zones. In the South, milk production is average in most livelihood zones except in Gedo, where milk production is below average due to below-average 2020 *gu* and start of 2020 *deyr* rainfall as well as low cattle and camel calving during the 2020 *gu*.

Labor wage rate: Despite the below-average *gu* harvest and delayed start of the *deyr*, the agricultural labor wage is trending above average in key reference markets in the South. On the one hand, labor demand is higher than normal due to locally average *gu* harvests in some high potential areas, the timing of the delayed off-season *gu* harvest in riverine areas, and seasonal demand for *deyr* land preparation and planting. Additionally, an increase in conflict incidents in 2020 has affected labor movements in parts of the South, especially in Bay and Lower Shabelle. As a result, the daily agricultural labor wage rate reached 102,500 SOS/day in Bullo-Mareer rural market in Qoryoley of Lower Shabelle in September, which is the third highest wage recorded in the past 22 years, 14 percent above September 2019, and 44 percent above the five-year average. In Burhakaba market of Bay, the daily agricultural labor wage rate rose to 80,000 SOS/day in September, which is 14 percent above the five-year average.

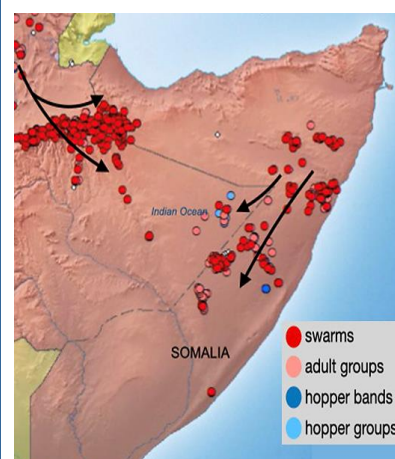
Livestock prices: Livestock prices are high across the country, reflecting persistently low supply in north-central Somalia, a recovery in export demand and sustained local demand since the start of the COVID-19 pandemic, and generally healthy livestock body conditions (Figure 6).

Figure 3. CHIRPS rainfall accumulation as a percent of the 1981-2010 average, October 1-30, 2020



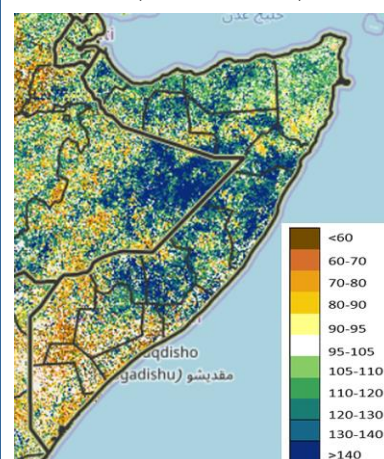
Source: FEWS NET

Figure 4. Desert locust situation as of late October 2020



Source: FAO Desert Locust Watch

Figure 5. Normalized Difference Vegetation Index as a percent of the 2003-2017 median, October 21-30, 2020



Source: FEWS NET

Additionally, the increase in conflict events in 2020 contributes to above-average prices in the South as it disrupts supply and marketing operations, even though overall livestock supply in the South is normal to above normal levels. Livestock prices have exhibited a rising trend since April 2020, staying resilient despite prior concerns regarding the impact of the pandemic on *hajj*-related livestock exports. Goat prices in most regions are similar or higher than both last year and the five-year average. For example, in September 2020, the price of one local quality goat in Dhusamareb of Galgaduud was SOS 887,500 (or US\$ 44.4), which is similar near last year and the five-year average. In Burao of Togdheer, the average price of SOS 485,000 (or US\$ 57.1) is 8 percent and 23 percent higher than last year and the five-year average, respectively.

Staple food prices: In September, sorghum and maize prices ranged from below average to slightly above average in most key reference markets. Although the 2020 *gu* harvest is below the long-term average, cereal production performed much better than during the 2019 *gu* and has replenished market supply, driving a seasonal decrease in prices. Significant humanitarian food assistance through the lean season and post-harvest periods has likely also contributed to stabilizing prices. In Hargeisa in the Northwest, the price of sorghum is 31 and 20 percent lower than September 2019 and the previous five-year average, respectively. In Galkayo, a market representative of northeastern and central Somalia, the price of sorghum is 21,000 SOS/kg, which is 5 and 7 percent above the September 2019 and five-year average, respectively. The maize price is 13,000 SOS/kg, which is near last year and the five-year average. In high potential areas of the South, including Qoryoley of Lower Shabelle and Baidoa of Bay, the price was 23-30 percent below last year and 2-9 percent below the five-year average. In contrast, however, are flood- and conflict-affected areas. These areas had poor local production, flood affected farms and conflict-related disruptions to trade movements, driving prices to significantly above-average levels. Maize and sorghum prices in September in Beletweyne of Hiiraan reached SOS 11,000/kg and SOS 14,250/kg, respectively, which is 18-21 percent higher than the 5-year average. Similarly, September prices of sorghum and maize in Wajid of Bakool and Sakow of Middle Juba were SOS 12,000/kg and SOS 13,125/kg, respectively, reaching 38-70 percent above the five-year average.

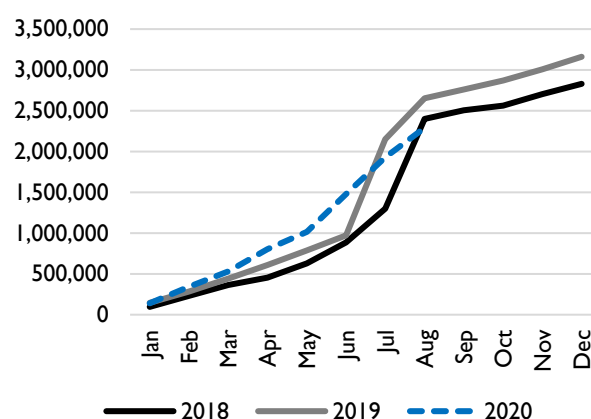
In September, the price of imported foods such as vegetable oil, wheat flour, and rice were stable in the last one month in most of the south and close to previous year and the average. This is due to steady supplies from Mogadishu and Kismayo ports and low fuel prices. In the North, however, imported food prices have been elevated since March 2020 due to supply disruptions associated with COVID-19 and the rehabilitation of Bossasso port, coupled with lingering effect of depreciation of the Shilling in the northeast regions. In Bossasso port, for example, total cereal import in March- September 2020 was estimated at 103,696 MT, a decline of 13 percent and 55 percent from last year and the recent 5 year-average. Although import flows are starting to recover, these items range from 10-20 percent above last year and the five-year average.

Household purchasing power: Terms of trade (ToT) were generally favorable in key markets in September, reflecting the high labor wage and high livestock prices. In Baidoa of Bay, for example, the daily labor rate could purchase 18 kg of red sorghum, compared to 9 kg in 2019 and the five-year average of 17 kg. In Bardheere of Gedo, the daily labor wage bought 20 kg of red sorghum compared to 15 kg in 2019 and the five-year average of 16 kg. Similar trends exist in Hiiraan, Middle Shabelle, Lower Shabelle, and Gedo, as well as central and northern Somalia. However, there are some exceptions such as in Bakool region, which is detailed on pages 10-12.

Income from livestock sales in rural areas have also either remained stable or increased over the past year. The goat-to-cereal ToT in most pastoral areas in the central and northern regions were similar to September of last year, but close to their five-year averages. In September in Burao market of Togdheer, the sale of local quality goat bought 92 kg of rice, up from 90 and 79 kg in September 2019 and the five-year average. Similarly, in Galkayo, the sale of a goat bought 114 kg of rice, up from 100 kg and 79 kg from last year and the five-year average. A few exceptions are observed in parts of the South in Juba and Gedo, where a significant decline in purchasing power is attributed to high cereal prices and stable or declining livestock prices. In Jilib of middle Juba and Bardera of Gedo, the ToT declined by 10-45 percent compared to the five-year average.

Conflict: Conflict in southern and central regions has increased from last year. According to data collected by the Armed Conflict Location & Event Data Project (ACLED), the number of Al Shabaab-directed remote violence from January to July

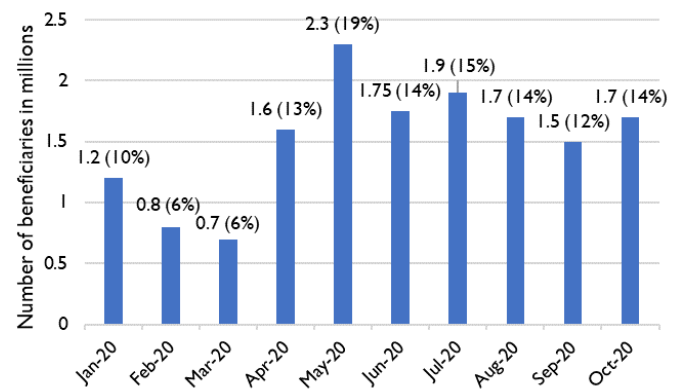
Figure 6. Number of live animals exported from Bossasso and Berbera ports in 2020 compared to 2019 and 2018



Source: Bossasso and Berbera port authority data

2020 increased by 49 percent when compared with the first seven months of 2019. ACLED also records a 28 percent increase in the number of battles involving Al Shabaab. FSNAU evaluates interclan conflict related to resources or retaliation as low to medium risk in Sanaag (Elafweyn and Erigabo), Galgaduud (Cabudwak and Cadaado), Hiiraan (Defow north of Beletweyne) and Lower Shabelle (Wanlaweyne), where conflict has caused loss of lives and assets and disrupted socio-economic activities, trade, and population movements. From January to September, UNHCR's Protection and Return Monitoring Network recorded 193,000 people displaced by conflict, with the highest displacement of 75,000 and 42,000 people occurring in Lower Shabelle and Bay regions, respectively.

Figure 7. Total recipients and percent of the total national population who received food assistance, January–October 2020



Source: Somalia Food Security Cluster

Humanitarian food assistance: According to the Somalia Food Security Cluster (FSC), an average of 1.6 million beneficiaries per month received cash/voucher or in-kind assistance between August and October (Figure 7). The monthly number of beneficiaries peaked in May, when more than 2.3 million beneficiaries received assistance. Recent distribution reports suggest that deliveries in September/October were approximately 75 percent of the monthly target, with the shortfall in delivery driven by humanitarian access constraints in Bakool, Lower Shabelle, and Middle Juba as well as inadequate funding. During the 2020 post-*gu* assessment in July/August, field enumerators also observed most food assistance was delivered to IDP settlements in south/central, rather than rural areas, due to insecurity.

Current outcomes

Pastoral areas: Pastoral areas in central Somalia, *Hawd Pastoral* and *West Golis Pastoral* livelihood zones in the Northwest, and *Southern Inland Pastoral* livelihood zone of Gedo are Stressed (IPC Phase 2), due to either below-normal herd sizes in central Somalia or due to reduced livestock productivity in rainfall-deficit areas. Typically, the consumption of livestock products improves in October with the onset of goat births; however, below-average rainfall in the North and in Gedo is causing milk production to be atypically low. In *Coastal Deeh Pastoral* and *Fishing* of Northeast, *East Golis Pastoral*, and *Guban Pastoral* livelihood zones, Crisis (IPC Phase 3) outcomes are likely due to low livestock holdings resulting from prior droughts, which limit their number of saleable animals to fund food and water purchases. Conversely, Minimal (IPC Phase 1) outcomes are likely in southern pastoral areas, where households' livestock holdings are near-to-above baseline levels and milk production for consumption and sale is seasonally normal.

Agropastoral and riverine areas: In *Riverine Gravity Irrigation* livelihood zone of Middle Shabelle and Lower Juba regions and *Riverine Pump Irrigation* livelihood zone of Hiiraan, poor households have limited maize stocks from a below-average *gu* main harvest and low off-season harvest. In addition, since many fields remain inundated, households are also earning less income from agricultural labor. Most households have difficulty purchasing adequate food and are currently in Crisis (IPC Phase 3). Food insecurity is similarly high in *Bay-Bakool Low Potential Agropastoral* livelihood zone, where most poor households have significantly below-average cereal stocks from the *gu* harvest and few livestock or other assets to help them cope. In the Northwest, *Togdheer Agropastoral* livelihood zone is in Crisis (IPC Phase 3) due to poor fodder and crop production and low livestock holdings after several consecutive poor rainfall seasons. Poor *deyr* rainfall in October and limited flash floods from the Golis Mountains impeded the development of the ratoons of sorghum and grass. As a result, household income from crop and fodder sales is below normal. Since household income from livestock and crop sales is also low, many households in agropastoral areas are facing difficulty purchasing adequate food from markets.

In most other southern and central agropastoral areas, Stressed (IPC Phase 2) outcomes are likely. Even though the *gu* harvests were relatively better – but still below-average – in these areas, poor households have limited cereal stocks. Seasonal labor income from *deyr* cultivation, seasonal milk production, and income from livestock and milk sales are preventing worse outcomes. In the remaining southern agropastoral areas, above-average livestock holdings, average pasture and water availability, and more favorable *gu* harvests are driving Minimal (IPC Phase 1) outcomes.

Urban areas and internally displaced person (IDP) settlements: Many poor urban and IDP households continue to struggle to meet their minimum food and non-food needs, according to the results of the 2020 post-*gu* household survey conducted by FSNAU and partners among urban and IDP households in July/August. On average, 21 percent of surveyed households

reported a Household Hunger Score (HHS) indicative of moderate hunger (HHS 2-3) and three percent reported an HHS indicative of severe hunger (HHS 4-6). Most poor households typically spend a high proportion of their income on food expenditures, and the economic impact of the COVID-19 pandemic had a significant impact on their ability to purchase food. Many households reported a decline in remittances, increased food prices, and a decline in employment and other income-earning opportunities. Among 11 assessed areas, up to 15 percent of urban and IDP households said they received external remittances between April and June, with the exception of urban households in Hargeisa (28 percent) and Beletweyne (18 percent). During this period, urban households were more likely to receive remittances and to receive higher amounts than IDP households, with totals ranging from USD 75-379 among urban households compared to only USD 0-200 among IDP households. Overall, urban and IDP household reported a 10-30 percent decline in the amount that they typically receive.

IDPs, a majority of whom are poor and live in urban areas with limited livelihood assets and employment options due to limited skills, have a greater reliance on external humanitarian assistance. While food assistance plays a significant role in preventing worse outcomes for many households, a significant proportion of IDPs continue to face moderate to large food consumption gaps. Of the estimated 2.6 million IDPs in Somalia, approximately 24 percent are in Crisis (IPC Phase 3) and an additional eight percent are likely in Emergency (IPC Phase 4). Acute malnutrition levels ranged from 'Critical' (GAM WHZ 15-29.9 percent) to 'Serious' (GAM WHZ 10-14.9 percent) in 10 of the largest IDP settlements where FSNAU and partners collected GAM WHZ measurements. Meanwhile, most urban areas are Stressed (IPC Phase 2), though an estimated 10-18 percent of the urban population has food consumption gaps indicative of Crisis (IPC Phase 3) or worse, including some households in Emergency (IPC Phase 4).

Assumptions

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

- Although the Somalia Ministry of Humanitarian and Disaster Management anticipates official COVID-19 daily case incidence will spike in the near term, movement restrictions are expected to remain minimal based on current directives.
- The economic impact of the COVID-19 pandemic is expected to wane over the medium term, supported by recovery in remittances and livestock exports, new social protection measures such as the *Baxnaano* program, and anticipated fiscal reforms. According to [the latest World Bank forecast](#), economic growth is expected to rebound in the last quarter of 2020 and grow by 2.9 percent in 2021. Remittances are projected to recover to normal levels, contributing 30 percent of Gross Domestic Product, while low fuel prices are likely to offset household expenditures.
- Based on rainfall accumulated to date and the NOAA and ECMWF probabilistic forecast models, cumulative *deyr* rainfall from October to December will most likely be below average in the northern and far southern regions of Somalia. In contrast, cumulative rainfall will likely be average to above average in central and south-central Somalia; however, there is a likelihood of poor distribution of rainfall in November and December.
- According to the NOAA/CPC NMME precipitation anomaly forecast, the December to January *xays* rains in *East Golis Pastoral* and *Guban Pastoral* livelihood zones will most likely be below average.
- In areas that accumulate below-average *deyr* rainfall in the north and far south, the January to March *jilaal* dry season will most likely be hotter and drier than normal. However, conditions will likely be near normal in Northwestern Agropastoral livelihood zone, which received near-average *karan* rainfall in 2020.
- Based on FEWS NET's analysis of rainfall performance in years with [waning La Niña conditions](#), the transition from La Niña to ENSO neutral conditions in early 2021 (with a 65 percent likelihood of La Niña from March to May 2021) is most likely to result in below-average *gu* rains from April to June.
- Desert locust will continue to cause crop and pasture losses, especially in central and south-central Somalia. Breeding and swarm development in central Somalia and southward winds during the *deyr* render these areas most vulnerable to damage. Hatching and band formation from the Northeast to parts of the South are expected to lead to substantial swarm formation from early December onwards, coinciding with the maturity and harvest periods of *deyr* season crops in the South. However, aerial control operations will likely reduce desert locust populations in the Northwest. During the 2021 *gu*, the northward shift of the winds and the coastal Somali jet stream will lower the risk in the South.
- Given average to above-average *karan* rains and improved crop performance to date, the *karan* harvest in Northwestern Agropastoral livelihood zone in November is expected to be moderately below average. Revised estimates will be available following FSNAU's post-*deyr* assessment in November 2020.
- Based on the *deyr* rainfall forecast and anticipated crop losses from desert locust swarms, the main *deyr* cereal harvest

in agropastoral areas in January/February will most likely be below average. Although agricultural labor demand is near normal for planting, demand will likely decline to below-normal levels during the weeding and harvesting periods. Some farmers may shift to cash crop planting to offset losses, though the cash crop harvest is also likely to be below average.

- The main *deyr* harvest in riverine areas is also most likely to be below average, but this will be driven by anticipated flooding resulting from average to above-average *deyr* rainfall in the Shabelle and Juba river catchments in southern Somalia and the Ethiopia highlands. However, a moderate *deyr* off-season harvest is expected in March/April 2021, since earlier river flooding will permit recessionary cultivation during the 2021 *jilaal* (January-March) dry season.
- Initially, the impact of below-average rainfall in northern Somalia and expanding desert locust swarms in central Somalia on pasture and water resources will be mitigated by dry pasture availability in the North and above-average *deyr* rainfall in central Somalia, respectively. From December to May, however, the increase in desert locust swarms combined with below-average 2021 *gu* rainfall will likely lead to atypical depletion of rangeland in the Northeast, central Somalia, and parts of the South. In the Northwest, aerial control operations will continue to combat desert locust impacts.
- Reflecting anticipated pasture and water availability, livestock body conditions in much of the North and in the far South are expected to deteriorate during the *jilaal* and remain below normal during the *gu*. In parts of the Northwest, central Somalia, and south-central Somalia, livestock body conditions are expected to remain normal.
- Based on observed and projected herd dynamics from the 2020 *gu* through the 2021 *gu*, low camel and medium cattle calving rates are expected in the 2021 *deyr* and medium camel and cattle calving is expected in the 2021 *gu*. Goat and sheep kidding/lambing rates will range from medium to low across the country in the *deyr* and the *gu*.
- Based on anticipated livestock births and pasture availability, milk production is generally expected to be seasonally high and near average through January. From February to May, milk availability will likely be lower, with the highest levels available in central and south-central pastoral livelihood zones. Overall, milk production is projected to provide sufficient supply to maintain slightly below-average prices throughout the outlook period, with variation in seasonal trends.
- Based on FEWS NET's integrated price projections for sorghum and maize in Qoryoley and Baidoa reference markets, local cereal prices are expected to seasonally rise during the November to January lean season in southern markets and will remain above-average in 2021. Rising food prices are expected due to consecutive seasons of below-average cereal production, including the 2020 *gu* and 2021 *deyr*.
- In the Northwest, local cereal prices will most likely remain near the five-year average through May 2021, facilitated by the *karan* harvest in November and near-average staple food imports from Ethiopia. Informal cross-border sorghum and maize imports from Eastern Ethiopia are projected to total approximately 15,000 MT from January to June 2021, supplying central and northern markets.
- Based on recovering foreign exchange flows and economic growth forecast, the Somali Shilling (SOS) is projected to appreciate slightly against major foreign currencies. The Somaliland Shilling (SLS) is projected to be stable, with slight fluctuations around the rates of SLS 8,000 to 8,500 against one United States dollar.
- Based on anticipated, continued recovery in import flows, the stable SLS and appreciating SOS, and favorable global supply outlook, imported staple food commodity prices in Somalia – including rice, wheat flour, vegetable oil, and sugar – are expected to be near average through at least January 2021.
- Based on FEWS NET's integrated price projections for a local quality goat in Burao and Ceerigabo reference markets, livestock prices in northern and central Somalia are expected to remain above average due to low supply, but will decline as body conditions decline from January to May. In Burao, for example, the local goat price is projected to be 10-25 percent above average. In the South, livestock prices are likely to remain near average due to relatively normal supply.
- Household purchasing power measured by the goats-to-cereal terms of trade (ToT) are expected to be near average, driven by near- to above-average livestock prices and near- to above-average cereal prices. The labor-to-cereal ToT are expected to drop beginning by mid-November, reflecting declining labor demand resulting from erratic or below-average rainfall and rising cereal prices during the *deyr* and subsequent *gu*.
- According to the Somalia Food Security Cluster, humanitarian partners plan to reach at least 2.2 million people per month through December. However, district-level targeting information and plans for 2021 are not yet available. Without districts targets and out of concern for an underfunded response, this scenario does not incorporate planned food assistance from November 2020 to May 2021.

- Conflict between government forces supported by the African Union Mission in Somalia (AMISOM) and Al Shabaab insurgents are likely to continue to cause population displacement, loss of life and assets; impede trade flows and humanitarian access in the South; and periodically disrupt agricultural activities. Tensions associated with upcoming parliamentary and presidential elections in late 2020 and early 2021 are anticipated to primarily affect Mogadishu. Unpredictable clan conflict over resources is also likely to rise during the *jilaal* season.

Most Likely Food Security Outcomes

Pastoral areas: Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are expected to persist in central and northern pastoral areas of Somalia through May 2021. In central Somalia, gains in livestock holdings due to favorable rainfall in the 2020 *gu* and 2020 *deyr* will likely help poor households withstand the impact of the anticipated, below-average 2021 *gu* rains. Conversely, outcomes are likely to be more severe in *Guban Pastoral*, *East Golis Pastoral*, *Northern Inland Pastoral*, and parts of northeastern *Coastal Deeh Pastoral and Fishing* livelihood zones, where 2020 *deyr* rainfall is poor. In the absence of food assistance, Emergency (IPC Phase 4) will be possible among some of the most vulnerable households. In contrast, a mix of higher livestock holdings, anticipated cattle milk production, lower presence of desert locust, and better rainfall performance are expected to sustain Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes in southern pastoral areas.

In the areas facing Crisis (IPC Phase 3), poor households are still struggling to recover their livestock holdings to sustainable levels since the devastating drought of 2016/17. Communities in *East Golis* and *Coastal Deeh* are also facing shortfalls in annual income from fishing and frankincense sales, due to the fall in demand during the pandemic. Although livestock births and favorable livestock-to-cereals terms of trade are expected to prevent worse outcomes, a significant proportion of poor households will be unable to both meet their minimum food needs and protect the health and sustainability of their herds during the consecutive, below-average 2020 *deyr* and 2021 *gu* rains. Livestock born in the Northeast during the 2021 *gu* will be the most vulnerable to the cumulative effects of below-average rainfall, with implications for household food and income.

Agropastoral and riverine areas: The anticipated, below-average 2020 *deyr* harvest and likelihood of below-average agricultural labor demand during the 2021 *gu* season are expected to drive Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes across agropastoral and riverine areas through May 2021. Poorly distributed rainfall – resulting in dry conditions in some agropastoral areas and flooding in some riverine areas – combined with damage from desert locust will be the main factors resulting in below-average 2020 *deyr* crop production. With limited household food stocks and reduced household income from agricultural labor, coupled with a projected decline in the labor-to-cereals terms of trade, poor households will have inadequate food and income sources to meet both their food and non-food needs. On average, poor farming households also have below-baseline livestock herd sizes with few mature saleable animals, which will limit the number of possible livestock sales and the production of milk for consumption and sale.

Outcomes will be most severe in *Bay and Bakool Low Potential Agropastoral*, *Togdheer Agropastoral*, *Riverine Pump Irrigation* of Hiiraan, and *Riverine Gravity Irrigation* of Middle Shabelle and Lower Juba livelihood zones, where Crisis (IPC Phase 3) outcomes are expected from October 2020 to May 2021. Households in these areas have eroded coping capacity from multiple seasons of below-average crop production, and household income from labor and sales of fodder, livestock, or milk will be inadequate to alleviate food consumption gaps. Further, several of these areas face additional challenges related to the periodic impact of conflict on livelihood activities and trade. Other livelihood zones that will likely deteriorate to Crisis (IPC Phase 3) during the February-May 2021 period include *Cowpea Belt Agropastoral* of central Somalia and *Southern Agropastoral* of Hiiraan livelihood zones, where *deyr* crop losses from desert locust are expected to be significant.

Stressed (IPC Phase 2) outcomes are most likely in areas where local rainfall performance is anticipated to be more favorable, desert locust presence is lower, and the local flood risk is expected to remain low to moderate. In *Riverine Pump Irrigation* of Gedo and *Riverine Gravity Irrigation* of Lower Shabelle and Middle Juba, recessionary cultivation opportunities have driven up the agricultural labor wage and the harvest of recessionary crops will provide food stocks from December to March. Farmers have also increased cultivation of high-value cash crops, boosting their income and food sources. However, poor households will be expected to pay down debt accrued from crop failure in prior seasons. In *Northwestern Agropastoral* livelihood zone, the below-average *gu/karan* harvest will provide several months of cereal stocks for consumption, while crop residue will either be sold as fodder to livestock exporters during the 2021 *jilaal* dry season or used for their own livestock feed.

Urban areas and IDP settlements: Despite the improved economic growth forecast in 2021 as the Somali economy begins to recover from the impact of the pandemic, many poor urban and IDP households have limited income sources, spend a high share of their income on food, and will remain at risk of food insecurity. Given consecutive seasons of below-average domestic cereal production from early 2020 to early 2021, local cereal prices in the South are projected to be above-average by 2021, which will place pressure on household purchasing power. Crisis (IPC Phase 3) outcomes are expected in most IDP settlements

through May 2021, and most poor urban households are likely to be Stressed (IPC Phase 2) or in Crisis (IPC Phase 3).

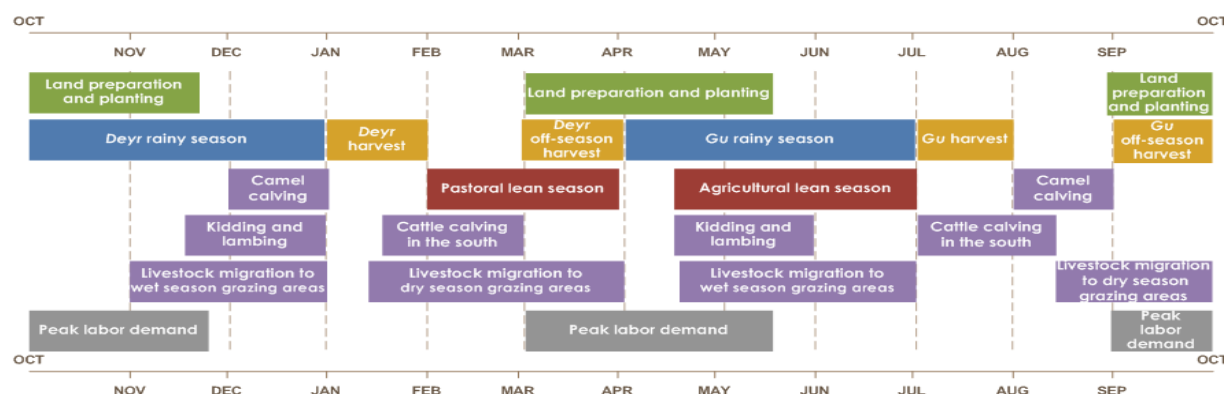
Acute malnutrition outcomes: From October to January, the seasonal increase in milk access during the *deyr* season is likely to play a role in maintaining *Alert* (GAM WHZ 5.0-9.9 percent) levels of acute malnutrition across most of the northern Somalia and *Serious* (GAM WHZ 10.0-14.9 percent) levels across most of southern and central Somalia and parts of the Northwest. More severe, *Critical* (GAM WHZ 15.0-29.9 percent) levels are expected in *East Golis Pastoral*, Hiiraan region, and most riverine areas due to reduced food intake and dietary diversity as well as the increased prevalence of waterborne disease in flood-affected areas. From February to May, the prevalence of GAM is expected to deteriorate due to reduced milk consumption during the *jilaal* and due to reduced food intake associated with below-average crop and livestock production. Based on historical trends, *Critical* (GAM WHZ 15.0-29.9 percent) levels are likely across southern, northeastern, and central Somalia and *Serious* (GAM WHZ 10.0-14.9 percent) levels are expected in the Northwest. According to the analysis of nutrition data collected in June-August 2020 by FSNAU and partners, an estimated 849,900 children under five years of age (the total acute malnutrition burden) are likely to be acutely malnourished through June 2021. This includes 143,400 who are likely to be severely malnourished. The areas of highest concern include *East Golis Pastoral*, Shabelle riverine areas, Beletweyne, and Baidoa, Bossaso, Galkacyo, Garowe, and Mogadishu IDP settlements. Underlying factors include high incidence of disease, poor child vaccination and Vitamin A supplementation, and poor child feeding practices.

EVENTS THAT COULD CHANGE THE SCENARIO

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

Area	Event	Impact on food security outcomes
Southern agropastoral and riverine areas	Significantly below-average <i>deyr</i> rainfall in November-December	In agropastoral areas, poor rainfall in November-December would lead to crop moisture stress during the reproductive or maturation stages of crop development, leading to significant crop losses or, in a worst-case scenario, widespread crop failure. More widespread Crisis (IPC Phase 3) outcomes and an increase in the population in Emergency (IPC Phase 4) would be likely. Conversely, the risk of flooding would decline in riverine areas, permitting farmers to resume recessionary cultivation and boosting agriculture labor demand. Access to fish and wild foods would also improve. Improvement to Stressed (IPC Phase 2) in February-May would be likely.
National	Intensification of desert locust upsurge within Somalia	In the event that vegetation and wind conditions create an even worse-than-anticipated desert locust infestation across Somalia, more widespread crop and pasture losses would be likely. On the one hand, below-average rainfall is expected to be less favorable for breeding. On the other hand, below-average rainfall could permit more widespread migration while offering little opportunity for crop recovery or pasture regeneration. Crisis (IPC Phase 3) could become more widespread in the February-May period, especially in agropastoral areas.
Urban areas and IDP settlements	Resumed global or regional COVID-19 lockdowns	Given the ongoing second wave of COVID-19 in the United States and Europe, the widespread reinstatement of lockdowns or strict movement restrictions in countries with close economic ties to Somalia would likely slow down or reverse Somalia's economic recovery. A decline in remittance flows to Somali households and other foreign exchange earnings and an increase in unemployment would be likely. Urban and IDP households would be worst affected, leading to even higher increase in the population facing Crisis (IPC Phase 3) or Emergency (IPC Phase 4).

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

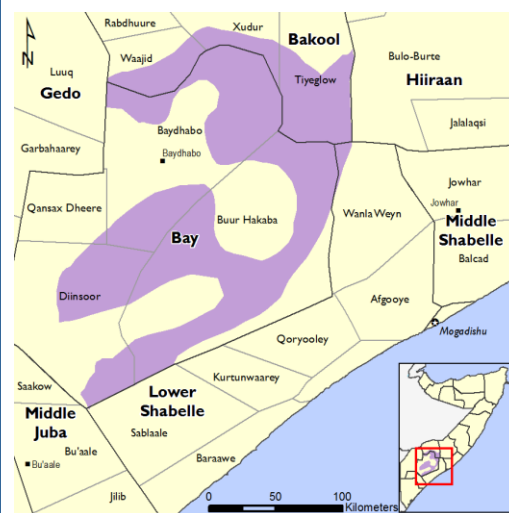
AREAS OF CONCERN

Bay Bakool Low Potential Agropastoral Livelihood Zone (Figure 8)

Current Situation

Below-average 2020 *gu* crop production and above-average cereal prices in the context of protracted conflict and insecurity is driving deterioration in food security outcomes in *Bay Bakool Low Potential Agropastoral* livelihood zone compared to August 2020. Although household survey data collected during the *gu* harvest period in July/August 2020 indicated Stressed (IPC Phase 2) outcomes, poor households have since depleted their food stocks and dependence on market purchases is high. Based on available crop data and field observations, the 2020 *gu* harvest performed poorly due to the impact of erratic rainfall distribution, pest infestations, and an early end of the *gu* rainfall season. According to FSNAU estimates, total *gu* cereal production in Bakool region was approximately 350 MT, which is 28 percent higher than the 2019 *gu* but 66 percent below the five-year average. In Bay region, the *gu* harvest was near average at the regional level; however, the majority of the harvest is attributed to neighboring *Sorghum High Potential* livelihood zone and crop performance in low potential areas was low.¹ In low potential areas, poor households' own-produced food stocks only lasted through August or September. Further – and despite near-average regional production – poor households' earnings from labor opportunities in high potential areas was intermittent due to the poor spatial distribution of rainfall.

Figure 8. Area of concern reference map, *Bay Bakool Low Potential* livelihood zone



Source: FEWS NET and FSNAU

In October, moderate rainfall at the start of the 2020 *deyr* season has alleviated dry conditions and facilitated land preparation and planting. The rains are also starting to replenish natural and man-made water sources. Although livestock ownership among poor households is low at an average of three cattle and seven goats/sheep, the rains will regenerate critical pasture and browse. However, desert locust has already been reported in Bakool region with movement toward Bay. The risk to crops and pasture is very high, and key informants have already reported crop losses at the germination stage.

Currently, satellite-derived data reflect below-normal vegetation conditions and field reports still indicate below-normal water availability due to the below-average *gu* and harsh *xagaa* seasons. Households with higher livestock holdings have seasonally migrated towards inland pastoral areas to access better pasture and water resources, which has consequently reduced access to milk gifts for poor households. Own-produced milk is also seasonally low prior to seasonal births.

Having exhausted their food stocks early, many poor households in low potential areas are sending family members to high potential areas in Bay where farm and off-farm labor demand and wages are near normal levels. This movement has created a local labor supply shortage in Bakool, distorting wages in low potential areas at above-average levels. Still, households are not likely to earn enough labor income to compensate for the higher cost of staple foods, which is related to low market cereal supply driven by both below-average *gu* production and the impact of insecurity on local trade flows between Bay and Bakool. Food prices are highest in Bakool, where the price of sorghum in Waajid reached 12,200 SOS/kg in September, which is similar to last year but 40 percent above the five-year average. As a result, even the high daily wage rate for agricultural labor can only purchase six kilograms of sorghum, which is among the lowest labor-to-cereals terms of trade in Somalia.

In addition to labor income, poor households may sell a goat to buy food, but expandability of this coping strategy is limited due to low livestock holdings. In this livelihood zone, household purchasing capacity is also measured by the sale of goat for cereals. In Waajid and Hudur of Bakool, the price of an average local quality goat has improved between July and September and is now 26 percent above last year and 19 percent above the five-year average. Despite average to above-average livestock prices, rising cereal prices have kept purchasing power below typical levels. In Waajid, the goat-to sorghum terms of trade was 18 percent higher in September 2020 than September 2019, but 36 percent below the five-year average.

Although the security context in Bay and Bakool has slightly improved compared to previous years, permitting a relative increase in labor migration, the overall situation remains unstable and tense. Waajid and Hudur districts remain under siege

¹ Crop production estimates are only available on the regional level for all regions.

and insurgents restrict the movement of both people and commodities. Between August and October, food assistance reached approximately 226,785 beneficiaries (20 percent of the total population) in Bay and Bakool regions; however, food assistance typically does not reach agropastoral households due to insecurity and bans imposed by insurgents.

Based on the above factors, Crisis (IPC Phase 3) outcomes are most likely in October. With few cereal stocks, inadequate income, and reducing purchasing power, many households are likely relying on purchasing food on credit, leading to an increase in debt levels which already totaled approximately 142 USD on average in August. Major drought-related displacement has slowed, but has not halted, indicative of very limited livelihood options among many worst-off households. Based on FSNAU survey data collected in July and August, the acute malnutrition prevalence in Bay was indicative of *Serious* (GAM WHZ 10.0-14.9 percent) at 12.0 percent, and *Serious* was projected to be sustained from October to December 2020. This is lower than the *Critical* (GAM WHZ 15.0-29.9 percent) levels observed during the 2019 *deyr*, and comparable to the 2019 *gu*, when GAM WHZ was 12.6 percent. However, nutrition data were not collected in Bakool due to prevailing insecurity.

Assumptions

In addition to the national assumptions, the following assumptions are made for this livelihood zone:

- Based on observed and forecast rainfall in Bay region, FEWS NET anticipates that cumulative 2020 *deyr* rainfall in this livelihood zone will most likely range between 70-85 percent of average. Poor late-season rainfall and crop damages caused by desert locust are expected to result in moderately below-average *deyr* crop production.
- FEWS NET's analysis of rainfall performance in years with waning La Niña conditions also indicate below-average rainfall is most likely from April to June 2021. As a result, a third consecutive season of below-average crop production is likely.
- Due to the impact of below-average rainfall and desert locust damage on weeding and harvesting demand, labor demand and wages are expected to fall and range from below-normal to near-normal levels during the 2020 *deyr* and 2021 *gu*. Wage dynamics will be driven not only by labor demand, but also by household labor movements to high potential agropastoral areas and urban areas.
- Livestock births and cattle milk availability are expected to be medium in the 2020 *deyr* as a result of medium conception rates during the recent *gu* season. Similar trends are likely to be sustained through May during the 2021 *gu*, based on sufficient rainfall supporting medium conceptions during the *deyr*.
- Based on current livestock prices in the main reference markets, livestock prices will likely follow seasonal trends and range from average to above average through January due to improved body weight and higher urban demand. However, prices are likely to decline to average to below average during the February to May period due to the impact of drier-than-normal *jilaal* and *gu* conditions on livestock body conditions and value.
- According to FEWS NET's integrated analysis, the price of sorghum in Hudur market in Bakool is projected to be 10-30 percent above the five-average throughout the scenario period. Meanwhile, the price of sorghum will likely remain near average in Bay region. These price dynamics will be driven by consecutive, below-average 2020 *gu* and *deyr* production and the proximity of the respective markets to the more productive *Sorghum High Potential* livelihood zone in Bay. Insecurity and conflict will also restrict intra- and inter-regional trade flow and movement.

Most Likely Food Security Outcomes

With little or no carryover stocks from 2020 *gu* production and inadequate income from agricultural labor during the *deyr* season, households are likely to experience widening food consumption gaps indicative of Crisis (IPC Phase 3) from October to January. Poor households have limited livestock holdings with few available for sale, likely amounting to sales of 1-2 goats in late 2020 and an additional 1-2 goats in early 2021. Cattle milk availability and access to social support, such as *zakat* and food gifts from better-off relatives, will offer supplementary food and income sources. However, poor households will most likely increase their reliance on stressed or crisis coping strategies, such as maximizing the use of loans.

From February to May, food security is anticipated to deteriorate across the livelihood zone due to the combined impacts of moderately below-average *deyr* crop production and the forecast below-average 2021 *gu* rains. Reduced carryover cereal stocks due to two consecutive poor seasons will render many households mostly reliant on food purchases. At the same time, households will continue to earn below-normal income from agricultural labor and face weakening household purchasing power. As sorghum prices rise, the labor-to-cereal terms of trade will likely decline. Faced with increasing difficulty meeting their basic food needs, Crisis (IPC Phase 3) outcomes are expected to persist.

East Golis Pastoral Livelihood Zone (Figure 9)

Current Situation

Crisis (IPC Phase 3) outcomes in *East Golis Pastoral* are being driven by the negative impact of the COVID-19 pandemic on frankincense trade and demand, impact of the desert locust infestation and poor rainfall on pasture, and persistently low livestock herd sizes since the 2016/17 drought. Household survey data collected by FSNAU and partners in July/August 2020 showed 56 percent of households had poor or borderline food consumption, and 10 percent had moderate hunger. Most poor households are struggling to fully recover from livestock asset losses sustained during the 2016/2017 severe drought. Although herds have grown modestly since 2018 due to favorable reproduction conditions, herds remain below baseline levels. Many households had to sell more livestock this year than they normally would have due to the loss of income from frankincense sales, in order to afford their food and other essential needs. Poor households' herds are currently estimated at 30 sheep and goats on average, equivalent to 75 percent of baseline. Typically, sheep and goat sales account for 37 percent of poor households' annual income.

Currently, most pastoral households have normal access to water from communal shallow wells and streams and livestock body conditions are average. However, while rangeland conditions are still adequate, they exhibit a declining trend due to delayed *deyr* rainfall. Additionally, desert locust has caused localized pasture losses, though overall locust presence has declined due to ongoing control measures and southward movement. The impact of the delayed *deyr* rains has so far been mitigated by the preceding 2020 *gu* rains, which were average to above average and replenished pasture, browse, and water sources. Localized light to moderate rainfall from July to September also mitigated the scorching, dry, and windy conditions of the *xagaa* dry season.

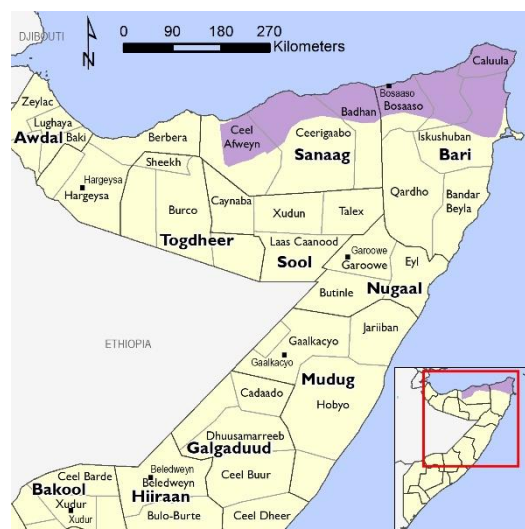
However, household income from livestock and milk sales is low. Most poor households do not have adequate number of saleable animals or sufficient quantities of own-produced milk to sell, as their herds comprise immature kids and breeding animals, which are not typically considered saleable. Poor households' milk production and access is also low. Goats that gave birth in 2020 *gu* have already dried up and births in the current *deyr* season are just beginning to provide some access to milk. The situation is relatively better in northeastern *East Golis Pastoral* (Bari region), where poor households' sheep and goats are currently near baseline levels (38 sheep and goats), but most of these are breeding females and their offspring. Due to delayed onset of the *deyr* rains, livestock conception rates are also atypically low, which does not bode well for next season.

The situation is exacerbated by the socio-economic impact of COVID-19 that drastically reduced international demand for frankincense harvest and sales, which account for 54 percent of poor households' annual income. Frankincense demand from the Arabian Gulf, Yemen, and Egypt has been significantly low since the beginning of the year, denying households substantial income from labor and sales. In Bari, for example, the average price of the export variety, locally known as '*beeyo*', declined to only USD 5.4/kg in the 2020 *gu* compared to an average of USD 10.25/kg in the 2019 *gu* and USD 8/kg in the 2019 *deyr*.

Although the income earned from the sale of a local quality goat is above average, poor households simultaneously face high food prices and limited saleable livestock. The high-level devaluation of the Shilling due to illegal printing of the Shilling in Puntland has also affected price dynamics. In Ceerigabo, a key reference market, the price of a local goat in SOS in October was 31-37 percent higher than last year and the five-year average. In USD, prices are stable at USD 40 compared to the previous year (USD 41) but seven percent below the five-year average, reflecting low supply of saleable animals and depreciation of the local SOS. Similarly, the local goat price in SOS in Caluula market is 11 percent higher than the five-year average. In this area, there is higher reliance on imported foods. Prices of imported cereals Caluula and Cerigaabo, such as rice and wheat flour, are 23-31 percent and 19-40 percent higher than last year and the five-year average, respectively.

Although Somalia Food Security Cluster distribution reports indicate high levels of food assistance to Sanaag region, household access to food assistance in *East Golis Pastoral* is low due to limited humanitarian access resulting from a high level of local insecurity. According to the household survey conducted by FSNAU in July/August 2020, only 14 percent of households confirmed that they received food assistance. In October, the Somalia Food Security Cluster reported delivery of assistance to 42 percent of the population in Ceerigabo district and 38 percent in Ceelafweyn district in Sanaag, and only 9-

Figure 9. Area of concern reference map, *East Golis Pastoral* livelihood zone



Source: FEWS NET and FSNAU

13 percent in Lasqoray/Badhan, Bosasso, Caluula, Iskushuban, and Qandala districts in Bari.

Given the below baseline livestock assets and productivity and a loss of income from frankincense production and trade, as well as a reported decline in fishing income, many poor households in East Golis livelihood zone are experiencing food consumption gaps indicative of Crisis (IPC Phase 3). Due to a heavy debt burden estimated at US\$ 400-500 or equivalent to the value of 8-10 goats, most poor households have reduced access to credit for food purchases. Poor households are currently relying mainly on the sale of breeding animals and cash or in-kind gifts and community support. Based on the 2020 post-*gu* analysis of nutrition outcomes, acute malnutrition has also likely deteriorated from 2020 *gu* but likely remains within *Critical* (GAM WHZ 15.0-29.9 percent) levels during the current *deyr* season.

Assumptions

In addition to the national assumptions, the following assumptions have been made for *East Golis Pastoral* livelihood zone:

- Although frankincense demand from the Arabian Gulf and the Middle East was low in most of 2020 due to the impact of the global economic slowdown on market demand, the re-opening of regional economy is likely to driven a rebound in market demand in 2021. However, given that the seasonal peak of frankincense harvesting and trade occurs in the July-September *xagaa* season, household income from frankincense will remain low through May 2021.
- With the loss of frankincense income and reduced fishing labor income, poor households will rely on livestock sales for food and other needs purchases. During the October-January period, households will likely sell approximately 1-2 goats per month, or a total of 5 goats, including breeding animals. During the February-May period, households' ability to sell goats will be constrained by the harsh *jilaal* season, which will diminish livestock body condition, salability, and value.
- Based on FEWS NET's integrated price projections for a local goat in Ceerigabo, the price of a local goat is expected to be 40-52 percent above the five-year average due to low market supply resulting from small herd sizes and a small number of animals in saleable condition. The average price will fluctuate with seasonal trends and is projected to reach a low of SOS 1,433,000 in February/March 2020 and a high of SOS 1,975,000 in May 2021.
- Despite the recent marginal increase in local staple food prices, which is attributed to the impact of COVID-19 on imports and the local devaluation of the Somali Shilling, food prices are expected to remain stable. This projection is based on the likelihood that COVID-19 restrictions are unlikely to be reinstated, resumption of normal commodity trade and port activities, and anticipated stability of global cereal commodity supplies and prices.

Most Likely Food Security Outcomes

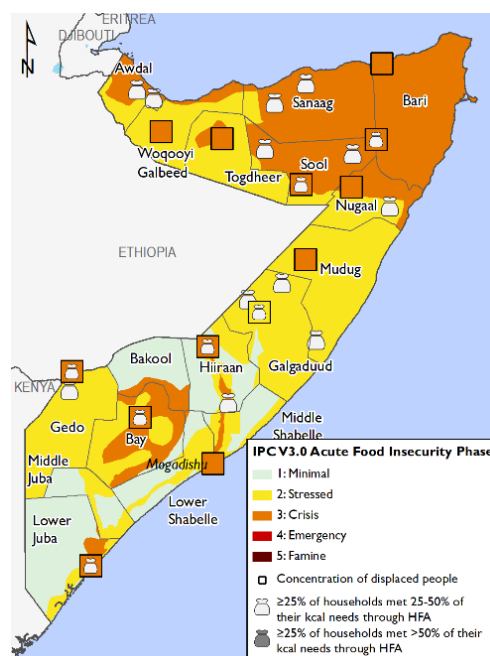
Food insecurity is expected to deteriorate through May 2021. Households will continue to face multiple shocks, including significantly below average *deyr* rainfall and a harsh *jilaal* dry season, loss of frankincense income, and decline in fishing activities. Initially, dry pasture availability and a medium level of sheep and goat births during the *deyr* will help to mitigate the effects of poor rainfall. Livestock body conditions and value will likely be sustained through December, permitting households to earn income from roughly 4-5 goat sales even though this will diminish their assets. Some milk, though at below-normal levels, will also be available for household consumption. However, food consumption gaps are expected to widen from January onward. The herd composition of marketable or milking animals will be low, while body conditions and value will begin to decline, restricting their saleability and reducing milk production during the *gu*. At worst, some offspring born during the 2020 *deyr* will die due to the harsh, dry conditions. Poor households are most likely to seek credit for food purchases, but may be limited in their ability to do so given existing debt burdens and traders' unwillingness/inability to extend additional loans. Households will also resort to social and kinship support of food gifts, but this is unlikely to be sufficient. As a result, the population in Crisis (IPC Phase 3) will likely rise and the severity of food consumptions gaps is likely to worsen. An increasing number of poor households are expected to experience large food consumption gaps indicative of Emergency (IPC Phase 4).

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.

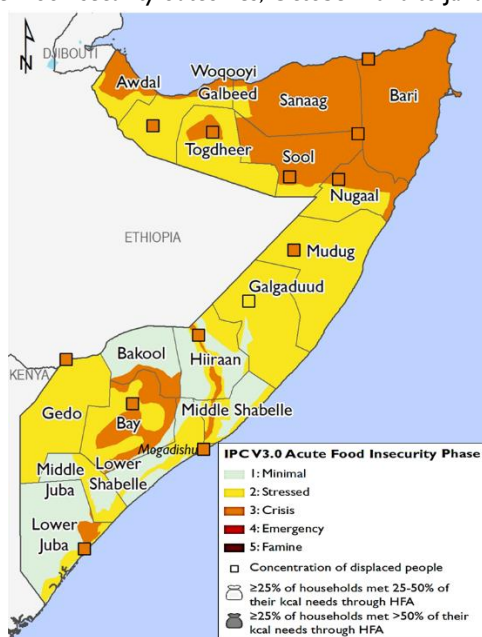
According to the Somalia Food Security Cluster, humanitarian partners reached 1.7 million people in October and plan to reach at least 2.2 million per month through December. However, district-level targeting information and plans for 2021 are not yet available. Without district targets and out of concern for an underfunded response, these maps do not incorporate planned assistance from November 2020 to May 2021.

Current, October 2020



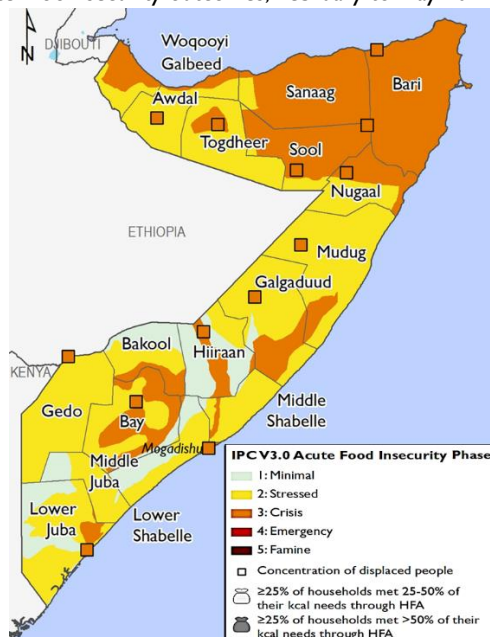
Source: FEWS NET and FSNAU

Projected food security outcomes, October 2020 to January 2021



Source: FEWS NET and FSNAU

Projected food security outcomes, February to May 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.](#)