Food and Agriculture Organization of the United Nations

SOMALIA

Agricultural livelihoods and food security in the context of COVID-19

Monitoring Report
January 2021

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Abbreviations

ACLED	Armed Conflict Location and Event Data Project
COVID-19	Coronavirus disease 2019
FAO	Food and Agriculture Organization of the United Nations
FEWS NET	Famine Early Warning Systems Network
FIES	Food Insecurity Experience Scale
FSNAU	Food Security and Nutrition Analysis Unit
GIEWS	Global Information and Early Warning System on Food and Agriculture
IDP	Internally displaced person
IPC	Integrated Food Security Phase Classification
IPC-GSU	Integrated Food Security Phase Classification Global Support Unit
SDG	Sustainable Development Goal
USAID	United States Agency for International Development

Key highlights

- Somalia's predominantly rural population currently faces a host of challenges threatening agricultural production and livelihoods, which in turn are driving elevated levels of food insecurity.
- Cropping households experienced below-average *Gu* harvests this year as a result of several hazards including climatic shocks in the form of poor distributed rainfall, which included heavy rains and flooding during certain periods, as well as extended periods of drought at others, in addition to crop pests and conflict and insecurity.
- In addition to climatic shocks, key concerns expressed by cropping households included a lack of income to hire labour and buy seeds and fertilizer, as well as marketing difficulties due to low prices and demand and high transportation costs.
- Many cropping households indicated that they were planning to plant reduced land area in crops for the upcoming *Deyr* season in comparison to normal, which could threaten future production levels and food security.
- In 2020, pastoral households in Somalia benefited from well above-average rainfall during this year's *Gu* season, which replenished water and pastoral resources and drove favourable livestock body conditions and prices. However, similar to cropping households, livestock producing households indicated numerous challenges facing the sector, including market issues and difficulties accessing veterinary services, feed, pasture and water.
- Most interviewed households reported that their overall incomes had decreased during the past three months (June–August) compared to the same time last year, with households involved in non-farm activities more likely to report income declines in comparison to households involved in cropping, livestock or agricultural labour. This suggests that households involved in the agricultural sector may have been slightly less exposed to COVID-19-related income shocks with regards to those involved in non-farm activities.

- The COVID-19 pandemic did not have any major impacts on the price of locally produced food staples, though a brief increase in imported rice prices during the months of April and May were observed, likely linked to COVID-19 disruptions to global rice markets, panic buying in Somalia and increased demand during the month of Ramadan.
- COVID-19-related impacts on livestock exports to the Middle East region from Somalia were not as severe as previously anticipated. Instead, livestock export volumes remained relatively stable during 2020 and livestock prices remained well above average. As such, these high livestock prices likely offset the impacts on food access that the rise in imported rice prices could otherwise have had in pastoral areas.
- The survey included the standard Food Insecurity Experience Scale (FIES) module to measure food insecurity at the household level, adapted for use with a 30-day recall period. Across the sample, 74.3 percent of households experienced moderate or severe food insecurity, while 53.5 percent experienced severe food insecurity. In light of these results, the prevalence of food insecurity was found to be significantly higher than average in the regions that belong to the northern agropastoral zone.

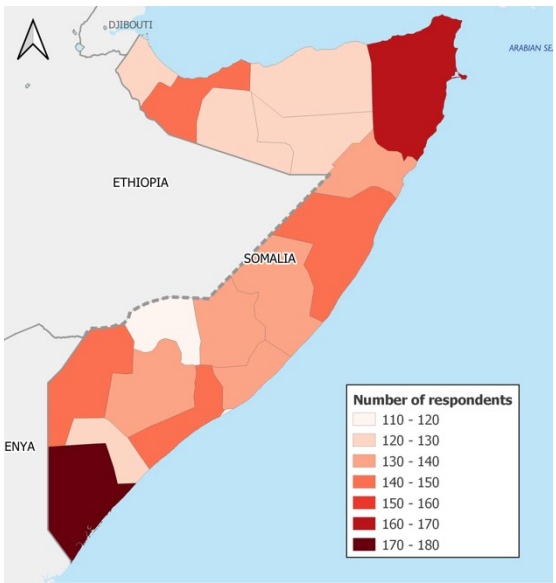
Methodology

With financial support from the United States Agency for International Development (USAID), the Food and Agriculture Organization of the United Nations (FAO) leads the establishment of a data and analysis facility in the context of the coronavirus disease 2019 (COVID-19) and other shocks. The objective of the facility is to improve decision making in support of the food security and livelihoods of all actors in key agricultural, livestock and fisheries value chains in high priority food crisis countries, with a focus on producers.

This assessment was conducted between August and September 2020 covering all 18 regions of Somalia. Due to movement restrictions caused by COVID-19 and security challenges, the assessment relied primarily on remote data collection using cell-phone based surveys with rural households and key informants.

Within the monitoring system, data is collected every three months, mainly through computer-assisted telephone interviews (CATI). At the core of the data facility is a household survey at the Admin 1 level; this information from household interviews is then triangulated with information from key informants, such as extension officers, food traders and agricultural inputs vendors, collected using closed-ended questions.

Figure 1. Number of respondents interviewed, by region



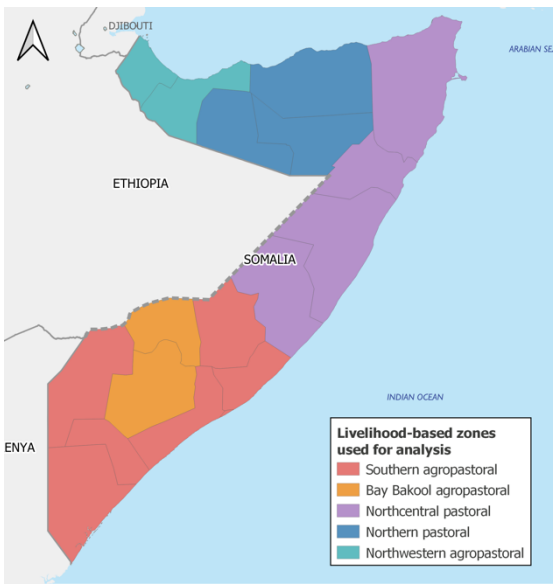
Source: FAO, 2020; FAO assessment results

For the household survey component of the assessment, 2 464 respondents were interviewed, using a random selection of households based on a list of beneficiaries from FAO interventions starting in 2019 and supplemented in a few areas by random digit dialling to get a sufficient number of respondents.[1] A minimum of 110 households were interviewed in each region, though in many regions, the final number of households interviewed significantly exceeded this figure. However, for some livelihood-based analyses, such as cropping and pastoral households, the number of respondents at the regional level (Admin 1) was insufficient. For this reason, the regions were grouped into the following five livelihood-based zones for the purpose of analysis: southern agropastoral zone, Bay Bakool agropastoral zone, northcentral pastoral zone, northern pastoral zone, and northwest agropastoral zone (Figure 2).

In addition, 51 key informants were interviewed through telephone calls and comprised primarily of people working for the Ministry of Agriculture, including rural extension officers, crop and livestock specialists and agrodealers.

This primary data was supplemented by secondary data and information collected during a desk review of other recent assessments in Somalia.

Figure 2. Livelihood-based zones



Source: FAO, 2020; FAO assessment results

[1] Given that the household survey component only interviewed FAO beneficiaries, the results of this assessment are not representative of the population as a whole in rural Somalia and is likely heavily skewed towards households active in subsistence agriculture.

Background

Current context in Somalia

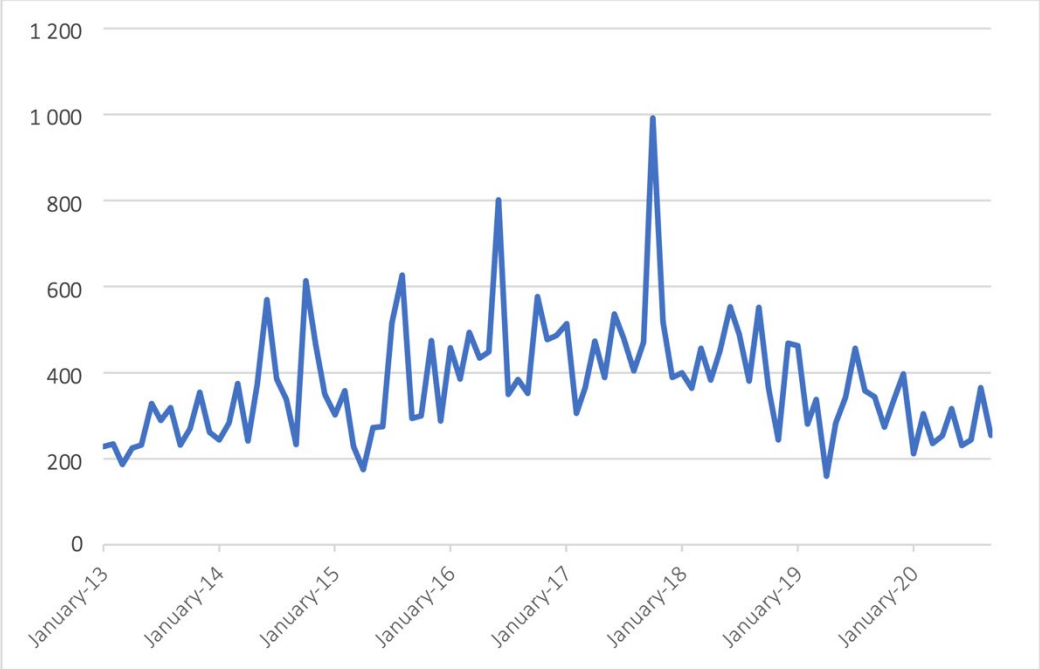
Somalia has experienced years of conflict and fragility resulting in chronic poverty and vulnerability, weak institutions, underdeveloped infrastructure, displacement, poor economic capacity and food and nutrition insecurity. Furthermore, the country continues to face a myriad of challenges, including a desert locust upsurge from the end of 2019 and throughout 2020, poor temporal rainfall distribution during the 2020 *Gu* rains, conflict and instability and population displacements.

Currently facing the worst desert locust outbreak in 25 years that threatens food security and livelihoods by posing a "Dangerous" threat to crop production and pastoral resources (FAO, 2020c), the Government of Somalia, in collaboration with FAO, has treated 86 071 ha of land since January 2020 (FAO, 2020b); however, desert locust-related crop and pasture losses have still taken place despite these efforts. According to a recent study by the Food Security and Nutrition Working Group for Eastern Africa (FSNWG, 2020), 48 percent of cropping respondents in desert locust-affected areas of reported high or very high losses, with 65 percent reporting expected below average harvests for their primary crop. Furthermore, 75 percent of livestock producing respondents reported high or very high rangeland losses, with 42 percent reporting that their livestock were in fair to poor conditions.

The 2020 *Gu* rainy season generally brought well above-average rains to the country, through the temporal distribution was poor. An early onset and heavy rains characterized the beginning of the rainy season. Though above-average rains would generally be good for crop production, it also caused riverine and flash floods which caused population displacements and damage to property, infrastructure, farmland, and crops. Between March and May 2020, 546 000 people were affected, including 217 000 who were displaced (OCHA, 2020b). These heavy rains were then followed by a dry spell across parts of the country in May, which negatively affected crop production.

Continued heavy rains across East Africa during the typical dry season (June to September) also caused 633 000 people to be affected, including 43 000 displaced since June (OCHA, 2020a).

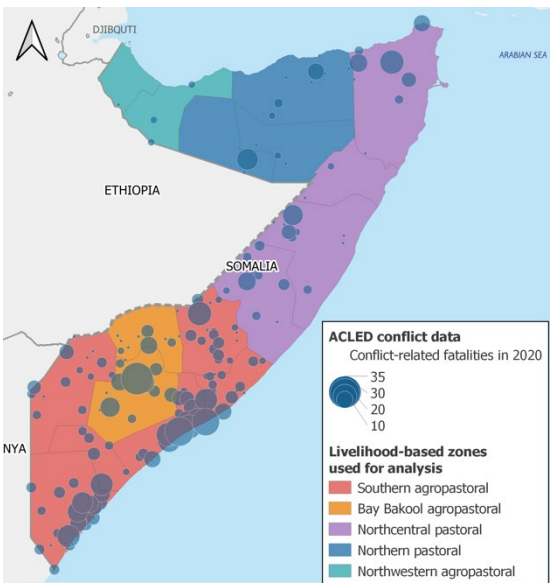
Figure 3. Conflict-related fatalities over time in Somalia



Source: FAO with data from ACLED, December 2020

Conflict and instability continue to plague the country, disrupting livelihoods and driving population displacements. As shown by Figure 3, ACLED data shows that fatalities from conflict have decreased slightly compared to 2016 and 2017 but remains high. Figure 4 shows that conflict events resulting in fatalities occurred across the country in 2020, though the majority of these events took place in southern areas. An addition to flood-related displacements, conflict and insecurity drove the displacement of 193 000 people this year (UNHCR, 2020).

Figure 4. Geographical distribution of conflict-related fatalities in 2020

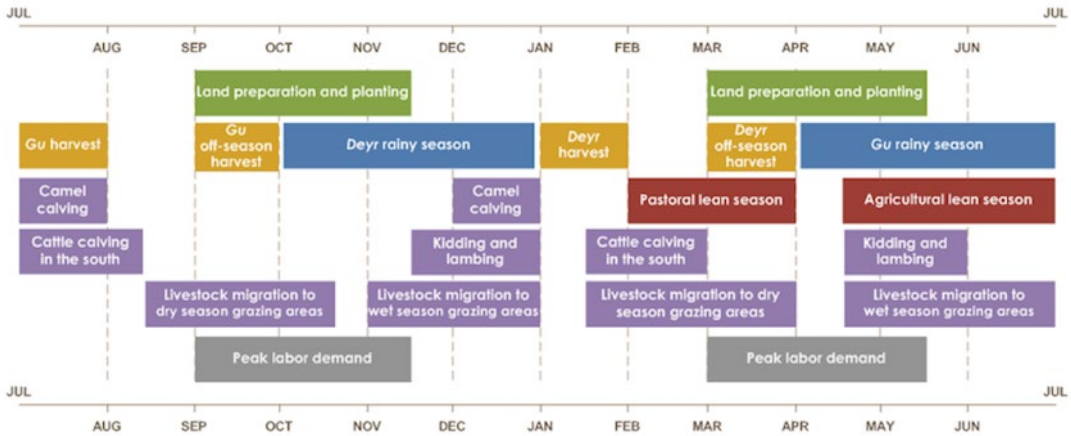


Source: FAO with data from ACLED, December 2020

In light of the current assessment, Somali rural livelihoods can be mainly broken down into three key groups, as follows:

- *Pastoralism*: Pastoralism generally is practiced where rainfall and ecology only support livestock rearing. Common animals raised in Somalia include cattle, camels, sheep, and goats.
- *Agropastoralism*: The second largest practiced livelihood strategy in Somalia. Located primarily in semi-arid areas, agropastoral households engage in both crop production and livestock keeping.
- *Riverine agriculture*: An irrigated form of agriculture, taking place predominantly along the Shebelle and Juba rivers. Key crops grown include maize, sesame, rice, fruits and vegetables.[2]

Figure 5. Somalia seasonal calendar



Source: FEWS NET, December 2013

Other smaller groups include fishing households along the coast and rural internally displaced persons (IDP) who are largely dependent on humanitarian assistance.

In Somalia, two key rainy seasons (*Deyr* between October and December and *Gu* between April and June) dictate the timing of most agricultural and pastoral activities. Depending on the time of the year, livestock are moved between dry season and wet season areas in search of water and pasture. Cropping households plant during the rainy seasons and harvest once the rains end.

In pastoral areas, the main lean season when food insecurity peaks, is immediately before the *Gu* rainy season. During this time period, livestock body conditions are poor, livestock prices are reduced and milk production is constrained, all due to limited water and pasture resources. A less severe lean season is also observed immediately before the start of the *Deyr* rains. Livestock movements during the dry season, particularly in drought-prone years when resources are scarce, can contribute to inter communal resource-based conflicts. Food insecurity is typically lower at the end of the rainy season

[2] As this livelihood activity is conducted in small portions of larger administrative units and data collection for this assessment was done at the regional level, this report groups riverine agricultural areas with neighbouring agropastoral areas for the purpose of this analysis.

and the beginning of the dry season, when pasture and water resources are abundant, in turn driving good milk availability and better livestock prices.

Seasonality in northwestern Somalia
Unlike the rest of Somalia, northwestern agropastoral zones are on a different seasonal calendar due to a different rainfall pattern. Most rains here occur between March and May (*Gu* season) and July to September (*Karan* season), though rains also take place between January and March (*Hays*). Consequently, three crop harvests occur per year in April, July and November, with the main harvest taking place during the *Karan* season gathered in November. In turn, the lean season runs from March to June.

In cropping areas, the main lean season occurs during the *Gu* rainy season, when food stocks from the *Deyr* harvests have depleted and households are market dependent as they wait for new harvests. A less severe agricultural lean season can also be observed during the *Deyr* rainy season. In cropping areas, food insecurity is typically lower during harvests when food stocks are available at the household level and income levels are seasonally higher.

Along coastal areas, fishing households experience a peak in fish stocks between November and December and between April and May.

This COVID-19 assessment in Somalia was conducted from August to September 2020, which is a dry period after the end of the *Gu* harvests. During this period, off-season *Gu* harvests are taking place in some areas while other cropping and agropastoral areas are preparing for the upcoming *Deyr* season with land preparation and planting activities. In pastoral areas, livestock are typically kept in dry season grazing areas during this time of the year.

COVID-19 and other risk factors in the country

80%
of respondents indicated that they were well aware of and informed about COVID-19

As of 31 October 2020, Somalia has had 3 941 confirmed cases of COVID-19, including 104 fatalities (IGAD, 2020). Since its first COVID-19 case in March 2020, the Federal Government of Somalia and Federal Member States have introduced several precautionary measures in response to the pandemic, including a ban on large gatherings to ensure social distancing, in addition to the closure of academic institutions and religious schools, the establishment of a curfew in Mogadishu and Garowe, the suspension of international and national passenger flights and the closure of borders with Kenya and Ethiopia (FAO, 2020d). As of October 2020, the Federal Government of Somalia has lifted several of these restrictions, particularly on movements in and out of the country, including by reopening international airports (ICAO, 2020) .

As these restrictions began to be implemented throughout the country, concerns grew about the implications for food systems in Somalia. It was feared that these restrictions had the potential to affect both food supply and demand, as well as food security. With this in mind, the Food and Agriculture Organization of the United Nations (FAO) put in place a monitoring system, funded by the United States Agency for International Development (USAID), that would identify and monitor risk factors stemming from the COVID-19 pandemic in order to assess the needs of rural populations and inform anticipatory actions and response.

This report outlines the key findings of this monitoring system's first assessment in Somalia.

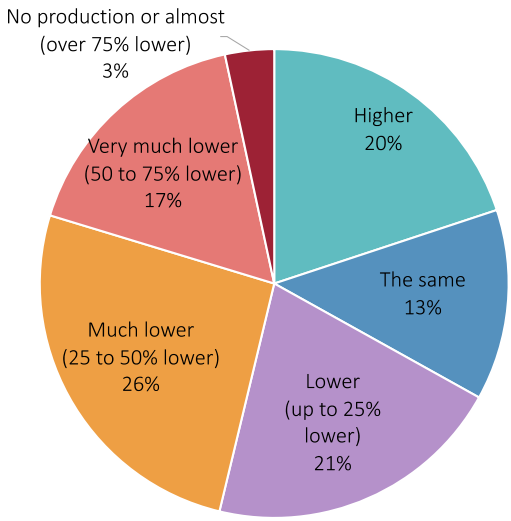
Agricultural production

Crop

Of the interviewed households, 46 percent indicated that crop production was one of their two main income sources in the past three months. In the southern agropastoral zone and Bay Bakool agropastoral zones, these percentages were much higher (55 percent and 66 percent, respectively), while in the northwestern agropastoral zone, 48 percent of respondents indicated crop production as a key income source. Meanwhile, in the northcentral pastoral and northern pastoral zones, 31 percent and 32 percent of respondents, respectively, reported cropping as a key source of income.[3] Most cropping respondents indicated that maize, followed by sorghum, vegetables and cowpeas, were the main food crops cultivated during the ongoing *Gu* season.

Of those involved in off-season *Gu* production and who had crops either growing, maturing or being harvested at the time of the assessment, the majority of respondents indicated that they expected harvests to be below average, with 20 percent of them reporting much lower production levels (a 50 to 75 percent production decrease) and 3 percent reporting almost no production or no production at all this year.

Figure 6. Harvest expectations among respondents involved in off-season *Gu* harvests



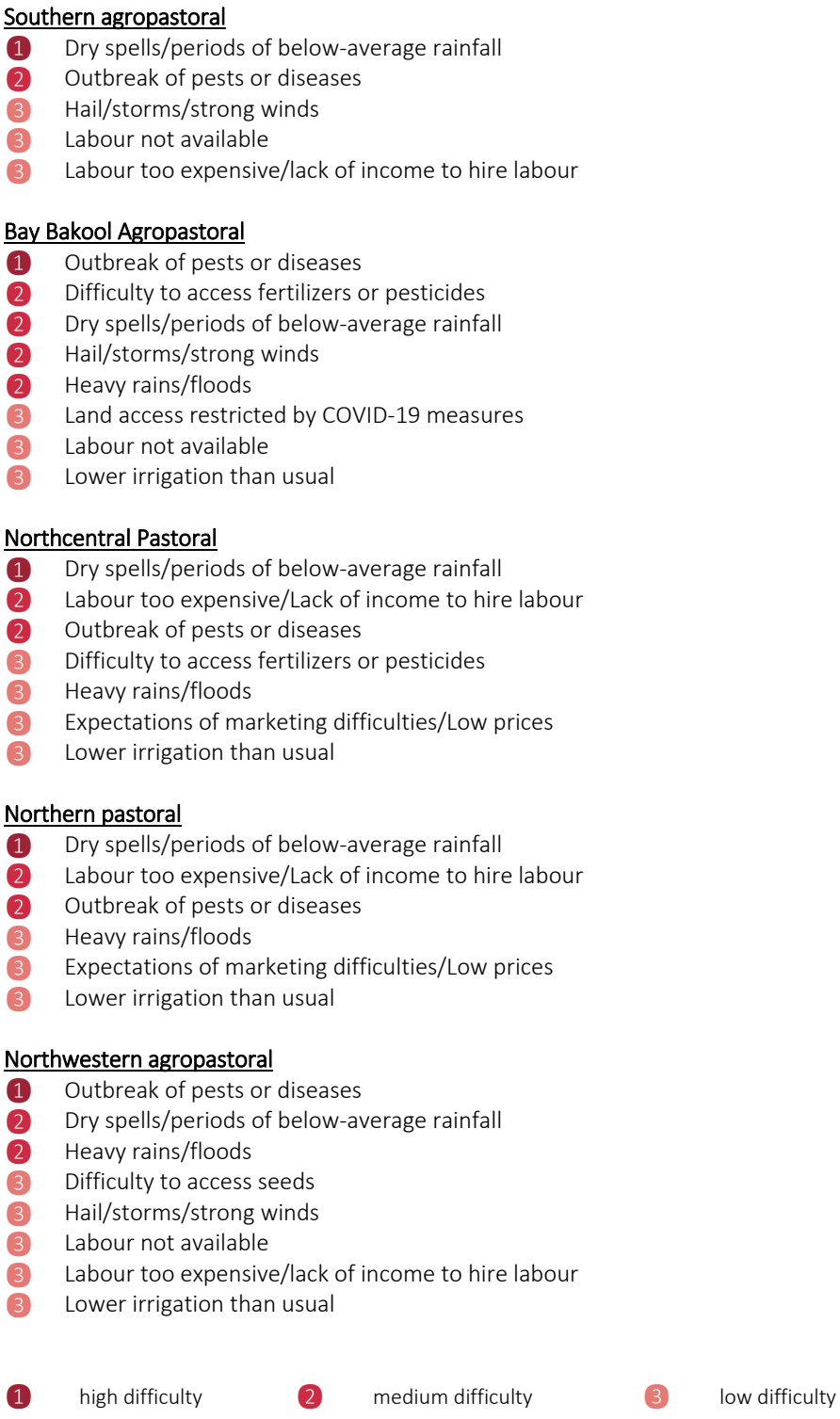
Source: FAO, 2020; FAO assessment results

Among crop producing respondents, 82 percent indicated that they had faced unusual difficulties with their crop production this year, with no major differences observed between different geographic areas in the country. Across Somalia, dry spells and periods of below-average rainfall, in addition to outbreaks of pests and disease, were the most widely reported challenges. Other challenges included difficulties accessing fertilizers and pesticides, the agricultural impact of hailstorms, strong winds, rain and flash floods and increasingly expensive labour that households could hire given their limited income for this purpose. Moreover, among those reporting issues with crop pests and diseases, most

[3] Given that livelihood zones do not follow administrative boundaries, certain parts of cropping areas were present within the two pastoral zones, including northern parts of Somalia's cowpea belt.

of them indicated that the desert locusts was the primary pest of concern. In addition, with respect to reports of dry spells, Somalia had well above average cumulative rainfall for the *Gu* season, but experienced a poor temporal distribution and significant dry spells in some areas, particularly during May 2020. As such, it is likely that these dry spells during May are likely to what respondents were referring.

Figure 7. Key cropping related difficulties facing farmers, by zone



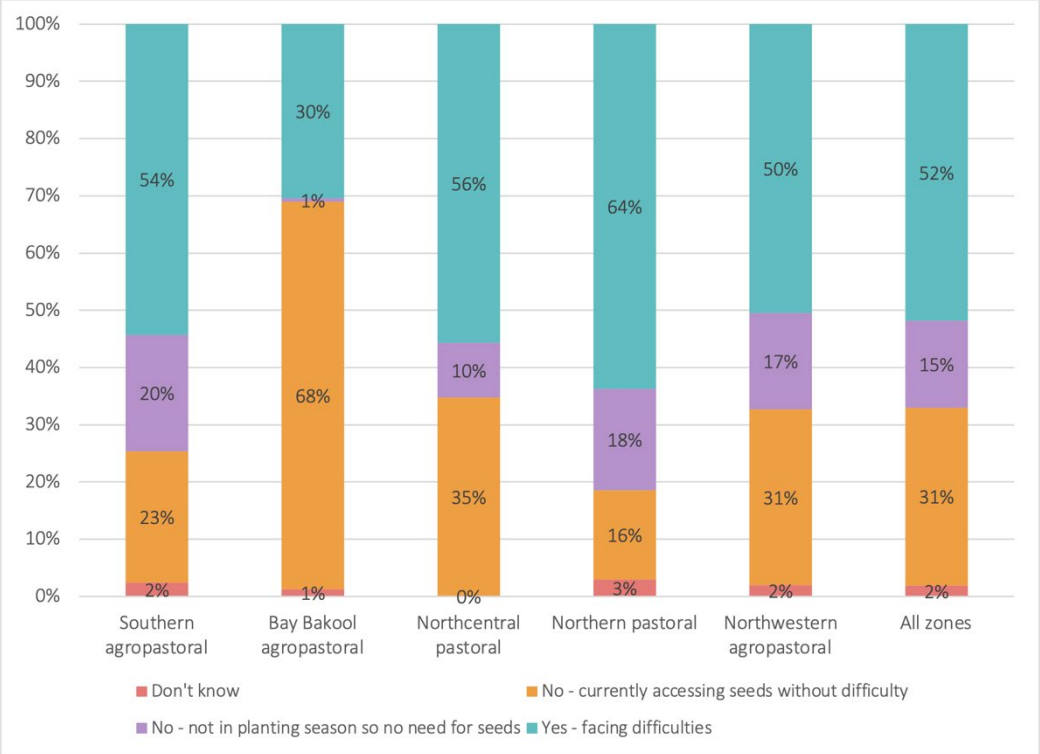
Source: FAO, 2020; FAO assessment results

These reports from interviewed households are in line with the results of the 2020 post-*Gu* assessment, conducted by FEWS NET and FSNAU-Somalia, which found that cereal production in southern Somalia would be 74 000 tonnes – 40 percent below the 1995–2019 average (FSNAU-Somalia/FEWS NET, 2020b). In the northwest, the expected November 2020 *Gu/Karan* cereal harvest was previously forecasted at 22 500 tonnes – 45 percent below the 2010–2019 average. However, above-average *Karan* rains from June to September have since improved harvest prospects; nonetheless, updated crop estimates are not yet available (FSNAU-Somalia/FEWS NET, 2020c). According to FSNAU-Somalia and FEWS NET, the main drivers of the below-average *Gu* harvest were flooding, erratic rainfall, dry spells, insecurity and conflict (FSNAU-Somalia, FEWS NET, 2020b).

According to a seed system security assessment conducted by the FAO Representation Office in Somalia in 2015/16 (FAO, 2016), 46 percent of households relied on local markets to source their seeds, while an additional 38 percent relied on their own seed sources and 13 percent relied on seed distributions and/or aid. Households in Somaliland were heavily dependent on their own seed sources (76 percent of all households), while households in Puntland and southern Somalia relied more on local markets (between 55 and 58 percent of households). Additionally, in 2015/16 a total of 87 percent of respondents believed their seed availability from various sources was adequate for their production, but between 39 and 48 percent of households, depending on the region, reported that seed prices were too high.

In comparison to the figures cited above, around 52 percent of cropping households across all zones reported difficulties related to seed access during the three months prior to the assessment, as shown in Figure 8. In looking at individual zones, households in the Bay Bakool agropastoral zone reported a more favourable access to seeds, with only 30 percent indicating that they had faced challenges during the past three months.

Figure 8. Percentage of respondents indicating difficulties accessing seeds



Source: FAO, 2020; FAO assessment results

Among the key challenges facing household access to seeds include the unavailability of seeds from vendors or local markets, insufficient household income with which to buy seeds and higher-than-usual seed prices. Other reported common concerns included the inability to reach markets to buy seeds, the unavailability of typically used seed varieties, and the non-provision of typical seed aid and/or subsidies this year.

Figure 9. Key seed access difficulties facing farmers, by zone

Southern agropastoral

1 Seeds unavailable from local market
1 Seeds unavailable from vendors
2 Higher seed prices than usual
2 Unable to go to the market to buy seeds
3 Seed varieties usually used are not available
3 Seeds usually provided by aid or subsidies not provided anymore

Bay Bakool Agropastoral

1 Household income insufficient to buy seeds
2 Higher seed prices than usual
3 Seed varieties usually used are not available
3 Seeds unavailable from local market
3 Unable to go to the market to buy seeds

Northcentral Pastoral

1 Higher seed prices than usual
2 Unable to go to the market to buy seeds
3 Household income insufficient to buy seeds
3 Seed varieties usually used are not available
3 Seeds unavailable from local market
3 Seeds unavailable from vendors

Northern pastoral

1 Higher seed prices than usual
1 Household income insufficient to buy seeds
2 Seeds unavailable from local market
2 Unable to go to the market to buy seeds
3 Seeds unavailable from vendors
3 Seeds usually provided by aid or subsidies not provided anymore

Northwestern agropastoral

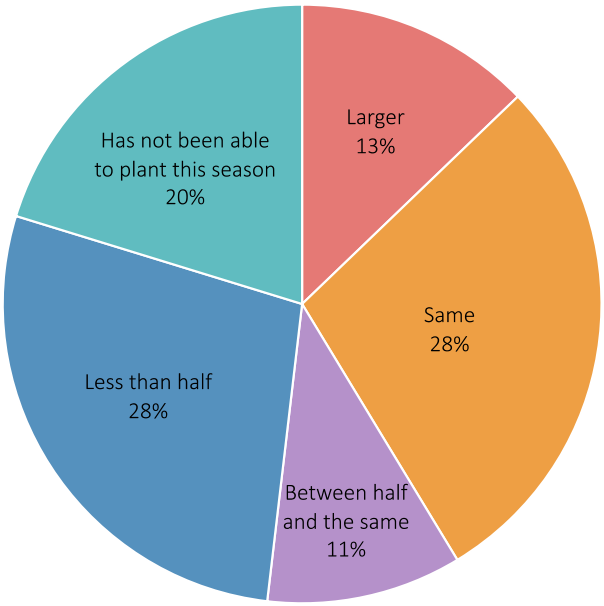
1 Seeds unavailable from vendors
2 Higher seed prices than usual
2 Seed varieties usually used are not available
2 Seeds unavailable from local market
2 Unable to go to the market to buy seeds
3 Household income insufficient to buy seeds
3 Seeds usually provided by aid or subsidies not provided anymore

1 high difficulty 2 medium difficulty 3 low difficulty

Source: FAO, 2020; FAO assessment results

Looking forward to the ongoing *Deyr* season, most interviewed respondents indicated that they had planted or were planning to plant less land this season in comparison to a typical year. It is noteworthy that 48 percent of households indicated that they would be either reducing their area planted to less than half of usual levels or would be unable to plant this season at all.

Figure 10. Reported area planted or planning to plant compared to a normal year
(percent of all cropping respondents)



Source: FAO, 2020; FAO assessment results

Livestock

Of all interviewed households, 22 percent indicated that livestock was one of their two main income sources during the past three months. Northern zones generally had a higher percentage of households involved in livestock production than households in southern zones. For instance, 33 percent of households worked on livestock production in the northwestern agropastoral zone, 28 percent in the northern pastoral zone and 24 percent in the northcentral pastoral zone, whereas only 17 percent of households worked in livestock production in the southern agropastoral zone and 13 percent in the Bay Bakool agropastoral zone. Among the most commonly owned animals were sheep, cattle and camels.

According to the 2020 post-*Gu* technical release, carryover water and pasture from the 2019 *Deyr* season supported livestock through the dry 2020 *Jilaal* (January–March) season. Although some damage to pastures occurred due to desert locust outbreaks in the Northern and Central regions, heavy 2020 *Gu* and *Hagaa/Karan* rains moderated the impact and replenished pasture and browse across Somalia. As a result, pasture, browse and water availability across most of Somalia remained adequate to support livestock through at least the start of the 2020 *Deyr* season in October. In spite of this, livestock holdings and milk production remain below normal levels in the northernmost and central regions as a result of the residual effects of previous droughts (FSNAU-Somalia, FEWS NET, 2020b).

This assessment's findings show that 70 percent of livestock-rearing households indicated that they faced difficulties in their livestock production during the past three months. In the southern agropastoral and northcentral pastoral zones,[4] households identified difficulties accessing veterinary services as their most important challenge, while constrained water access was the most important challenge for northern pastoral and northwestern agropastoral zones. In addition, constrained access to pasture and feed and difficulties accessing veterinary inputs were also common concerns among households. Nonetheless, a lack of sufficient income was generally the primary reason for difficulties relating to the purchase of livestock inputs and services, as detailed below.

- *Veterinary services:* Among those who reported difficulties accessing veterinary services, 41 percent reported insufficient income to access services, 36 percent reported not being able to access the service provider, 27 percent reported higher prices than usual and 19 percent reported services not being available from the usual service provider.
- *Veterinary inputs:* Among those who reported difficulties accessing veterinary inputs, 35 percent reported insufficient income to purchase, 34 percent reported inputs not being available at usual vendors, 30 percent reported higher prices than usual and 26 percent reported not being able to access the market and shops to purchase.
- *Accessing animal feed/supplements*: Among those who reported that they faced difficulties accessing animal feed from local markets, 38 percent indicated that this was due to insufficient income to purchase feed, 28 percent reported feed was not available from usual vendors, 25 percent reported not being able to access the market to purchase feed and 21 percent reported higher prices than usual.

[4] The Bay Bakool zone was not included in this analysis due to a lack of households identifying difficulties in this zone.

Food supply and markets

Given Somalia's heavy dependency on market purchases throughout the year to access food, the proper functioning of markets is vital for the food security of Somali populations. For example, in Bay and Bakool in southern Somalia, poor households purchase 87 percent of their annual caloric needs from local markets (FSNAU-Somalia, 2009). Similarly, in the Addun pastoral livelihood zone, poor and very poor households cover 71 and 78 percent of their caloric needs, respectively, directly from market purchases (FSNAU-Somalia, 2011).

Moreover, cereals consumed in Somalia are sourced locally and from international markets. According to FAO GIEWS, 2020/21 total cereal requirements were 1.09 million tonnes, of which 169 000 tonnes could be covered by 2020 production levels, 885 000 tonnes covered by cereal imports and the remaining quantities coming from stock drawdowns (FAO, 2020a). Of the key staple foods, sorghum and maize are typically sourced locally or from regional East African markets, such as Kenya and Ethiopia, while wheat flour and rice are often imported from Thailand and India.

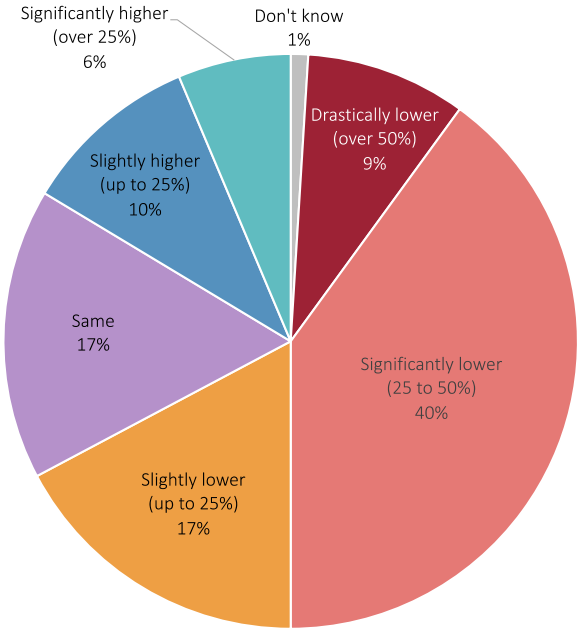
Markets are also essential for providing agricultural and pastoral households with a place to sell their production and generate income from food and non-food transactions. For example, among households who indicated cropping as their main livelihood activity, only 14 percent of respondents did not sell any of their production to local markets. Meanwhile, 27 percent sold up to 25 percent of their production, 38 percent sold between 26 and 50 percent of their production, 14 percent sold between 51 and 75 percent of their production and 4 percent sold over 75 percent of their production. Similarly, for those households reporting livestock as their main livelihood activity, only 12 percent did not sell any livestock or livestock related products to local markets. Meanwhile, 39 percent sold up to 25 percent of their production, 31 percent sold between 26 and 50 percent, 8 percent sold between 51 and 75 percent and 5 percent sold over 75 percent.

Crop marketing and prices

Among households indicating cropping as their main livelihood activity, the majority indicated that the level of their sales were reduced over the past three months compared to the same time last year, with 17 percent reporting slightly decreased sales (up to 25 percent lower than last year's levels), 40 percent reporting sales significantly decreased sales (between 25–50 percent lower than last year's levels) and 9 percent reporting drastically decreased sales (less than 50 percent of last year's levels), as shown in Figure 11. Additionally, 46 percent of respondents indicated that they were forced to give away or destroy a minor part of their production due to a lack of marketing and storage capacity during the previous three months, while an additional 33 percent indicated that they gave away or destroyed a large part of their production due to these challenges.

Figure 11. Crop sales compared to the same period last year

(percent of cropping households)



Source: FAO, 2020; FAO assessment results

Moreover, 69 percent of households indicated that they faced difficulties in selling their crops. Of this cohort, the main challenges cited to this end were (i) prices too low; (ii) lower demand than usual; (iii) higher costs of transportation; (iv) constrained market access; and (v) usual traders not coming to buy production anymore, as shown in Figure 12.

Figure 12. Key challenges selling crop products, according to purely cropping households

(in order of importance from left to right)

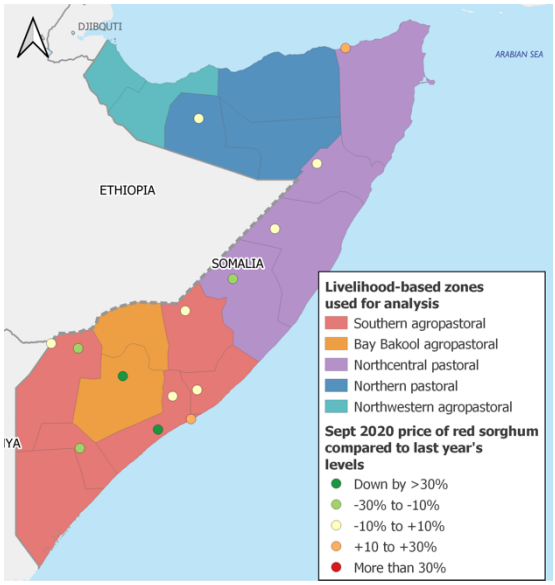
Prices too low | *Lower demand than usual* | *Higher costs of transportation* | *Constrained market access* | *Usual traders not coming to buy produce anymore*

Source: FAO, 2020; FAO assessment results

Data on producer prices in Somalia is limited, but a review of retail price trends can give a general sense of the impacts of COVID-19 on key staple food markets throughout the country. Low prices for locally produced commodities can negatively affected household incomes but can contribute to better food access for poor, market dependent households. Meanwhile, higher food prices can drive higher incomes for households selling their production, but can significantly limit food access and contribute to food insecurity for poorer households.

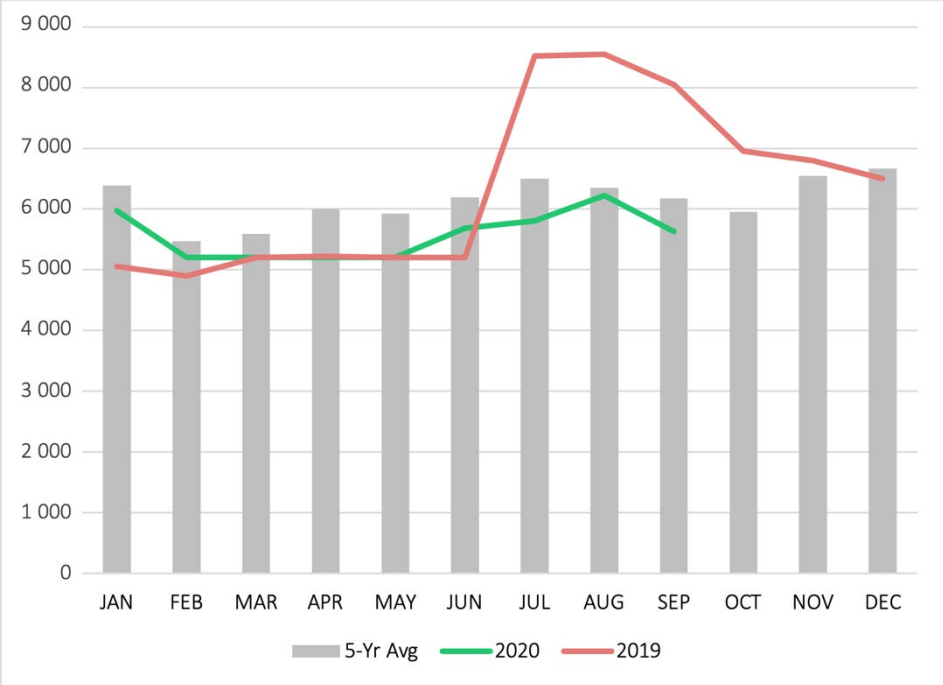
Sorghum and maize are key staple foods across cropping and agropastoral areas of Somalia. According to the September 2020 data, jointly collected by FEWS NET and FSNAU-Somalia, retail prices for red sorghum were either stable or down at most monitored markets compared to the same time last year, except for Mogadishu (a 26 percent increase) and Bossaso (a 23 percent increase). Prices for maize, meanwhile, varied considerably, with certain markets, such as Baidoa, Lugh, and Qorioley, seeing declines in prices of 27 percent, 31 percent, and 23 percent, while major price increases were observed in Buale (60 percent), Jilib (63 percent), and Kismayo (+43 percent). It should be noted, however, that prices in mid-2019 were in many cases elevated due to the poor performance of the 2019 *Gu* harvest. However, no major month-to-month anomalies have been observed for locally produced cereal markets since the start of the COVID-19 pandemic.

Figure 13. September 2020 price of red sorghum at key markets compared to 2019 levels



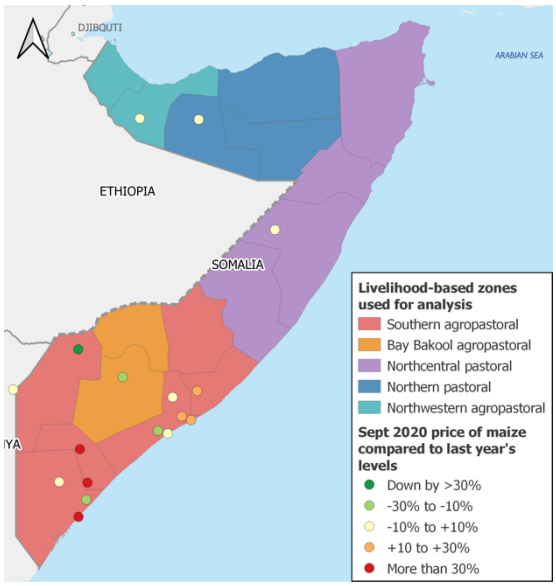
Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 14. Price of red sorghum in Baidoa



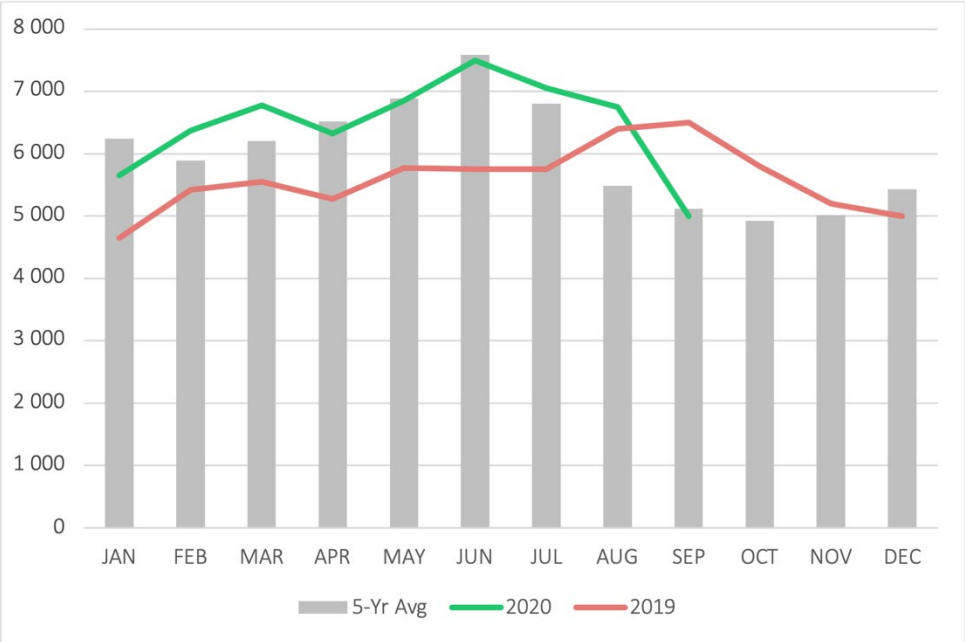
Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 15. September 2020 price of maize at key markets compared to 2019 levels



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

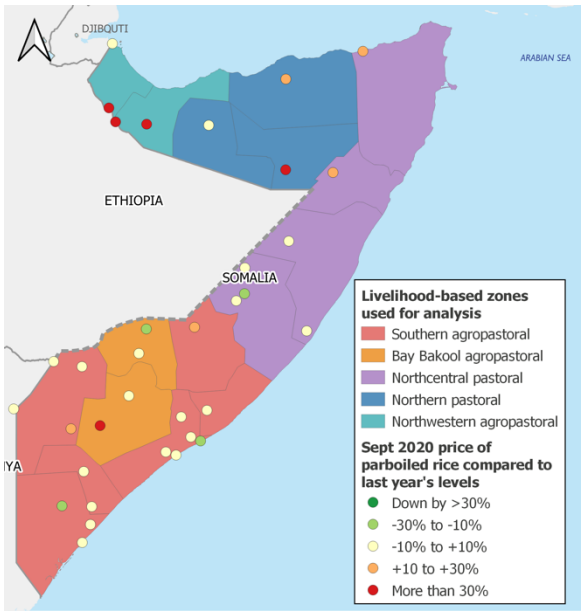
Figure 16. Price of maize at Qorioley



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

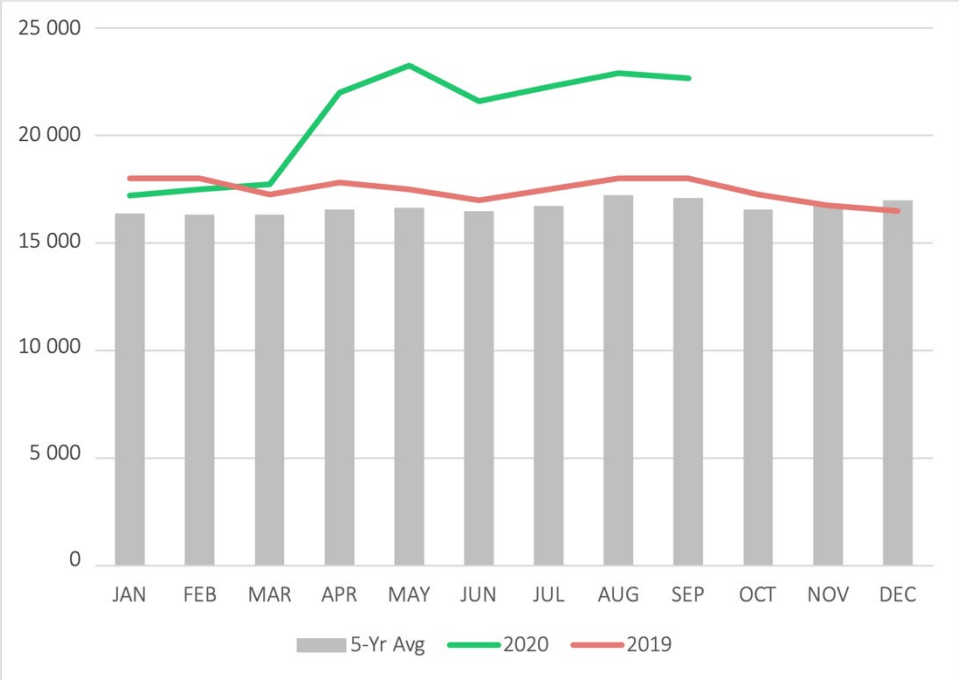
Rice is also an important staple food in pastoral areas. At key markets where imported rice is consumed, month-to-month price analyses show that there was an increase in rice prices during April and May, which was likely due to the combined effects of COVID-19 disruptions to global rice markets due to export restrictions in Asia, COVID-19 related panic buying within Somalia and increased demand during the month of Ramadan. After declining briefly, prices have recently begun increasing again due to the depreciation of the local currency in Puntland. Compared to last year, rice prices at most southern markets have remained stable, though significant price increases have been observed across northern areas.

Figure 17. September 2020 price of parboiled rice at key markets compared to 2019 levels



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 18. Price of parboiled rice at Garowe



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

The assessment included 42 interviews with agrodealers to gain a better understanding of the challenges that COVID-19 represented to their businesses. Most of these agrodealers were selling farm tools and equipment and were located in the South, either in the southern agropastoral or Bay Bakool agropastoral zones. These interviews revealed that most vendors' businesses were currently operational, though most reported that the COVID-19 restrictions in place were affecting their businesses.

Key difficulties that these traders reported in operating their businesses during the past month were, in order of importance:

- business restrictions due to COVID-19;
- higher operating costs;
- clients being unable to access their shop or market; and
- insufficient supplies.

Livestock marketing and prices

Among households who indicated livestock as their main livelihood activity, the majority reported decreased sales over the past three months compared to the same time last year, with 18 percent of them reporting sales were down slightly (up to 25 percent lower than last year's levels), 26 percent reporting sales were down significantly (between 25 and 50 percent lower than last year's levels) and 12 percent reporting sales were down drastically (less than 50 percent of last year's levels). Additionally, 38 percent of respondents indicated that they were forced to give away or destroy a minor part of their production due to a lack of marketing and storage capacities during the past three months, while an additional 34 percent indicated that they gave away or destroyed a large part of their production due to these same challenges.

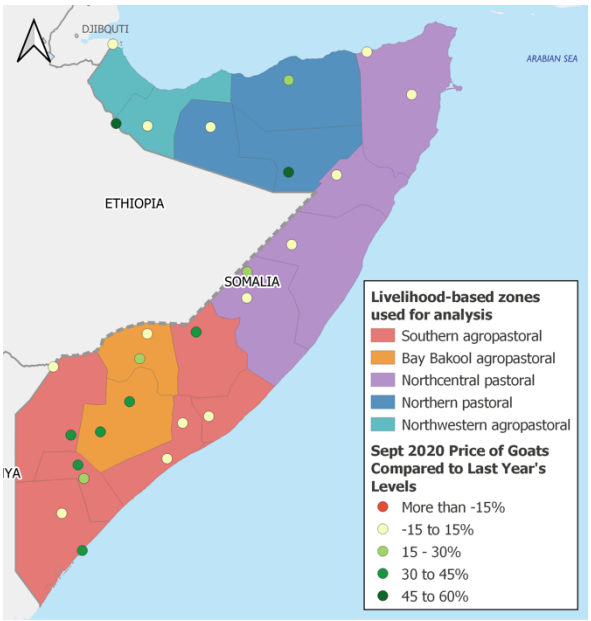
Additionally, 59 percent of livestock-rearing households indicated unusual challenges selling their livestock production during the past three months, with the main challenges identified including (i) prices too low; (ii) higher cost of transportation than usual; (iii) usual traders not coming to buy production anymore; (iv) lower demand than usual; and (v) constrained market access.

Figure 19. Key challenges selling livestock products, according to purely livestock raising households (in order of importance from left to right)

Source: FAO, 2020; FAO assessment results

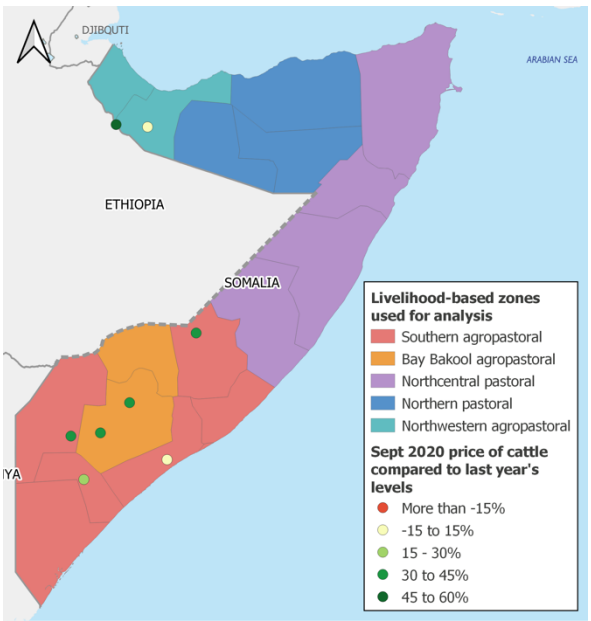
Despite interviewed respondents indicating concerns about the low price of livestock at local markets, data from FSNAU-Somalia and FEWS NET indicate that livestock prices at major markets have generally been above both last year's levels and the five-year average (Figures 22, 23 and 24). This was likely due to good livestock body conditions resulting from favourable pasture and water availability in 2020 and strong external demand, partially driven by import bans from the Middle East on some neighbouring countries due to Rift Valley fever concerns.

Figure 20. September 2020 price of goats at key livestock markets compared to 2019 levels



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

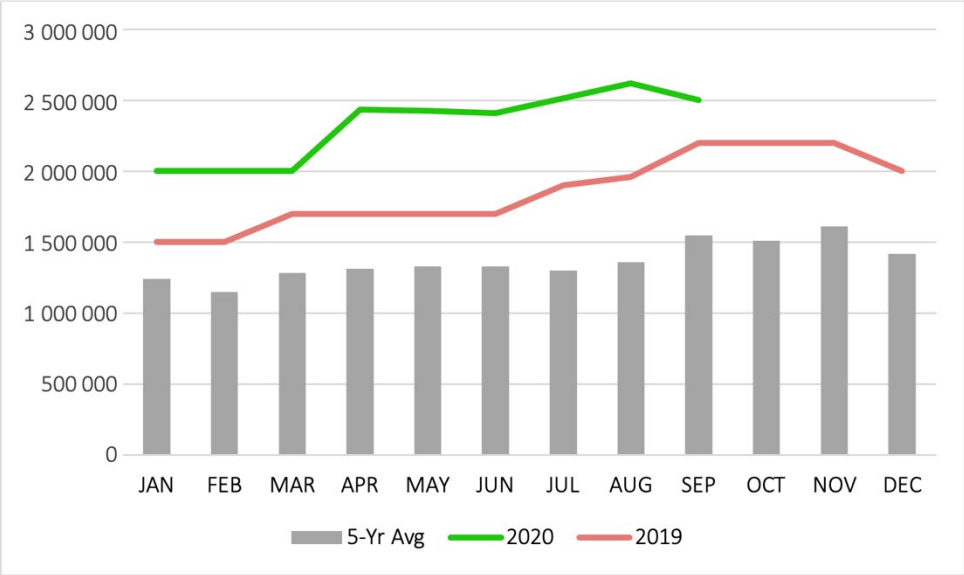
Figure 21. September 2020 price of cattle at key livestock markets compared to 2019 levels



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

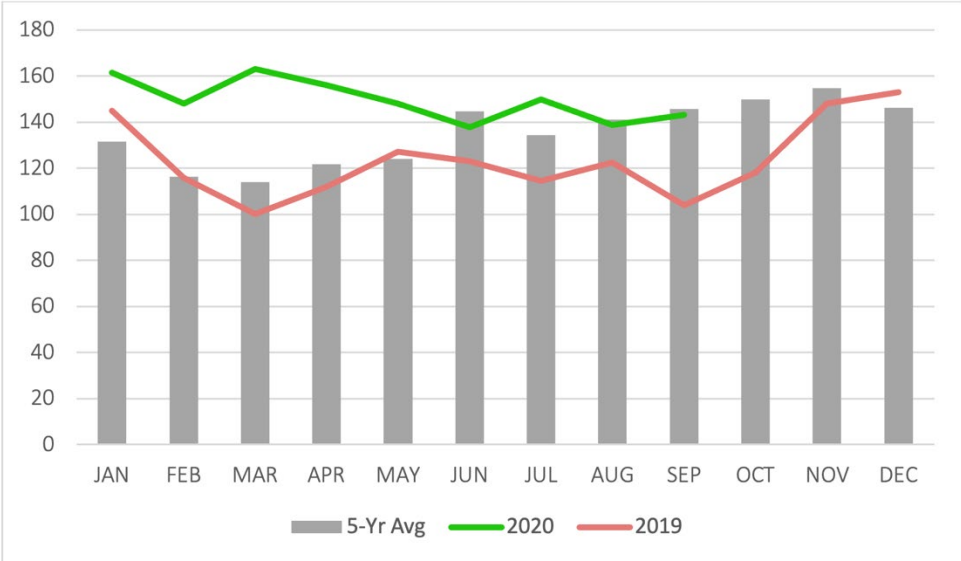
Given that pastoral households usually sell livestock and livestock products to buy food to meet their basic needs, livestock-to-cereal terms of trade (e.g., how much kilograms of cereal be purchased with the sale of one animal) can be a useful indicator of food access for pastoral households. When considering that imported rice prices have increased in some northern areas, but livestock prices have simultaneously remained above average, current terms of trade have generally remained either similar to, or above, the five-year average and last year's levels. This suggests average to above-average food access for pastoral households at this time.

Figure 22. Price of local quality goats at Galkayo market



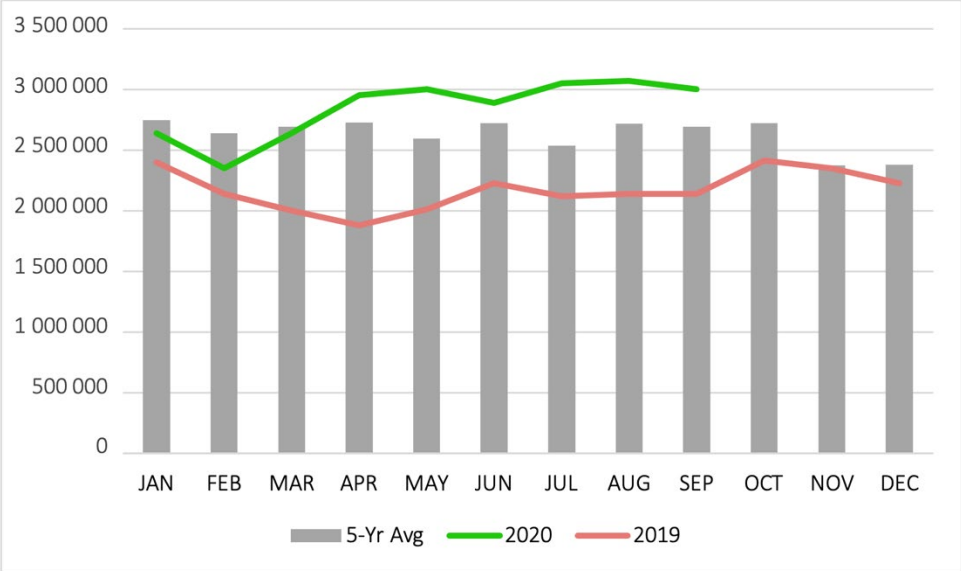
Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 23. Goat to rice terms of trade at Burao



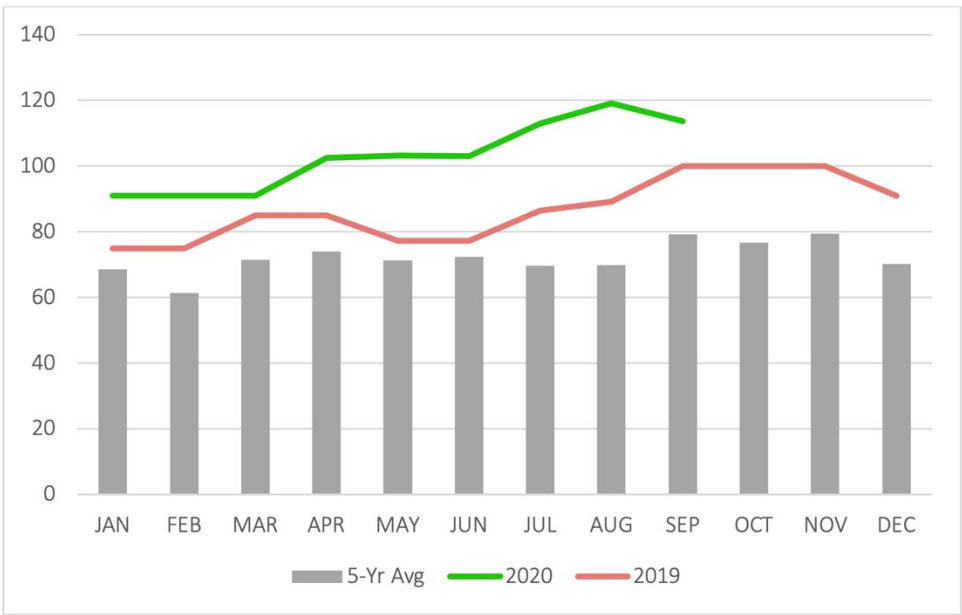
Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 24. Price of local quality cattle at Dinsor market



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

Figure 25. Goat to rice terms of trade at Galkayo



Source: FAO with data from FSNAU-Somalia/FEWS NET, December 2020

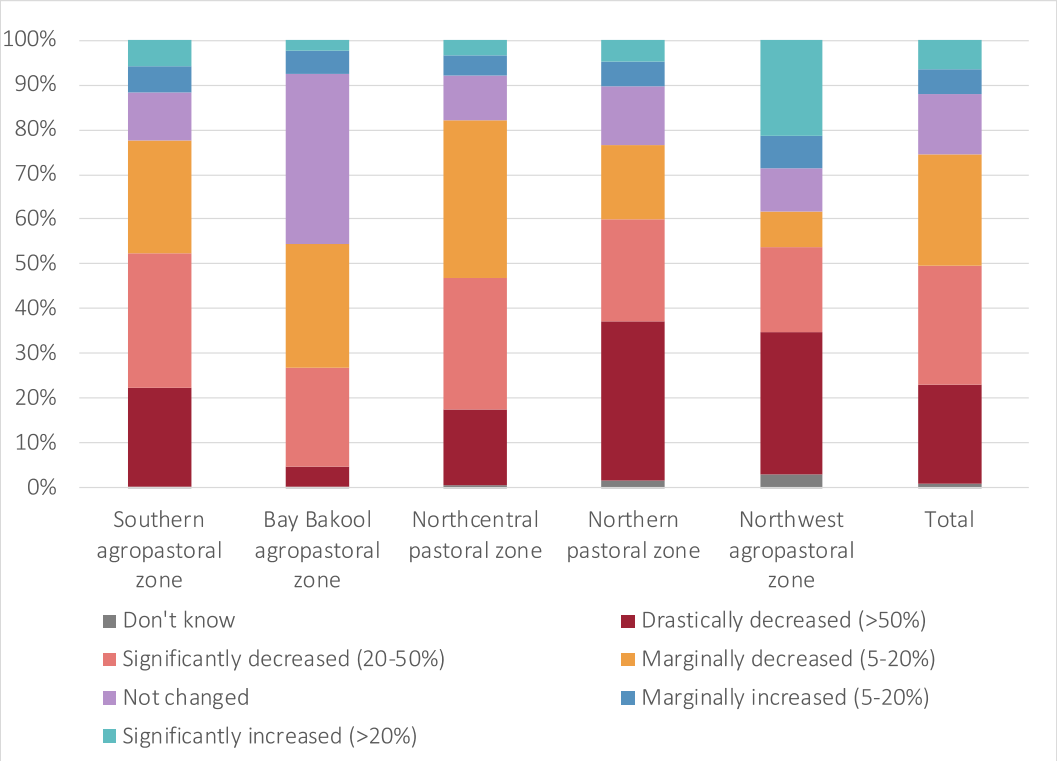
Earlier in the year, concerns were raised that COVID-19 would reduce livestock demand from the Middle East, in particular due to the cancellation of the *Hajj* for international participants. However, data shows that the forecasted severe decline in livestock exports did not occur as expected due to both the lifting of a livestock import ban by Saudi Arabia in April and increased Ramadhan-related demand from Egypt, Pakistan and Oman (FSNAU-Somalia/FEWS NET, 2020a). For instance, export data from the Berbera and Bossaso ports shows that livestock exports between January and September/October were already similar to levels observed in 2018 and 2019 (FSNAU-Somalia, 2020).

Livelihoods, incomes and coping strategies

Somalia's diverse income sources differ greatly from one area to another. In addition to cropping and livestock activities, fishing, forestry, agricultural labour, and non-farm activities also represent key livelihoods in Somalia. Among the interviewed households, 46 percent reported crop production as one of their two primary income sources, 22 percent reported livestock production, 1 percent reported fishing, 5 percent reported agricultural labour, and 63 percent reported non-farm activities.

The majority of the interviewed households (73 percent) reported that their overall income from their main income sources had decreased during the past three months prior to the assessment, hence affecting their cash flow. The Bay Bakool agropastoral and Northwestern agropastoral zones had the lowest percentages of households reporting a decline in their income (54 percent and 59 percent, respectively), while the other zones showed a higher proportion of households reporting incomes losses, such as 77 percent in the Southern agropastoral zone, 82 percent in the Northcentral pastoral zone and 75 percent in the Northern pastoral zone (Figure 26).

Figure 26. Changes in income during the past three months compared to the same period last year, by zone (percent of respondents)

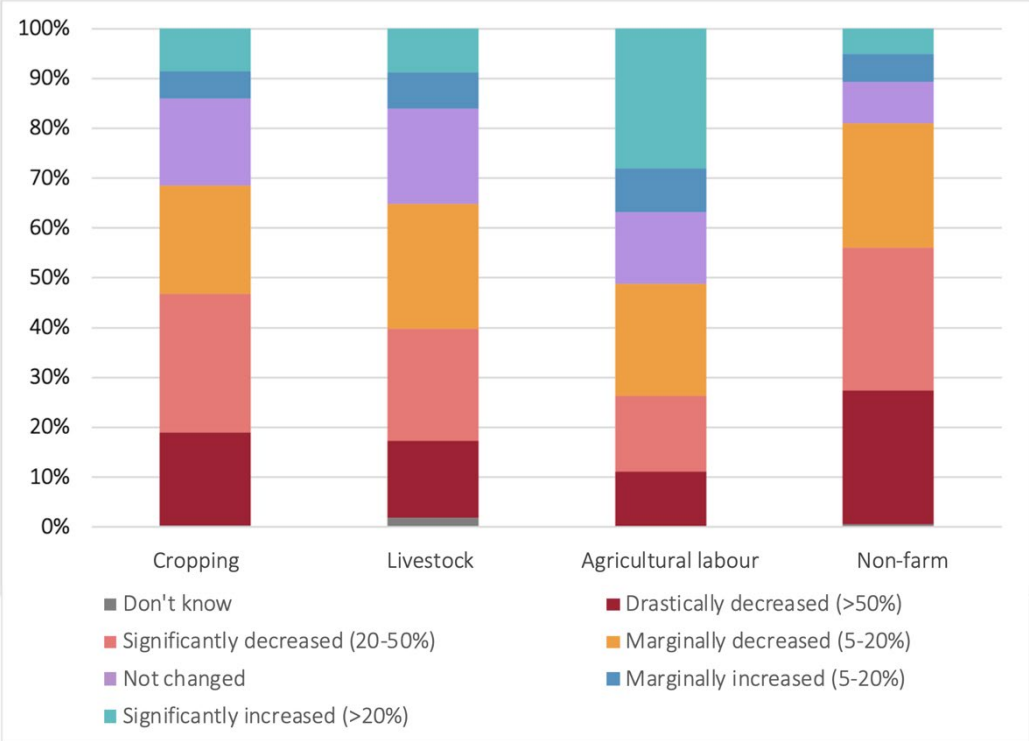


Source: FAO, 2020; FAO assessment results

Disaggregated by livelihood activity, the highest percentage of households reporting a decrease in income was observed among households involved in non-farm activities (81 percent of respondents). Conversely, households involved in agricultural labour were the least likely to report a decrease (49 percent), while for households involved in cropping and livestock, incomes were in-between (68 percent and 63 percent,

respectively), as illustrated in Figure 27. Therefore, this suggests that households involved in agriculture were slightly less exposed to COVID-19-related income shocks in comparison to those involved in non-farm activities.

Figure 27. Changes in income during the past three months compared to the same period last year, by income source (percent of respondents)



Source: FAO, 2020; FAO assessment results

When the respondents were asked about additional shocks that they experienced during the past three months, those most commonly cited were income losses (23 percent of households) and loss of employment (27 percent), coupled with price increases (21 percent), higher agricultural production costs (10 percent) and sickness of a family member (10 percent). Regional variations in reported shocks were reported, as shown in Table 1 below.

Table 1. Most commonly reported shocks, by zone

Zone	Top five shocks reported
Southern agropastoral zone	Income loss; no particular shock; loss of employment; increased prices; high production costs.
Bay Bakool agropastoral zone	No particular shock; loss of employment; Income loss; increased prices; sickness of family member
Northcentral pastoral zone	Loss of employment; no particular shock; increased prices; high production costs; income loss.
Northern pastoral zone	No particular shock; increased prices; loss of employment; income loss; sickness of family member.
Northwest agropastoral zone	Loss of employment; sickness of household member; increased prices; income loss; death of family member.

Source: FAO, 2020; FAO assessment results

Broken down by livelihood strategies, cropping, livestock and non-farm households most commonly reported lost employment, income losses and increased prices as key shocks that they experienced during the past three months. Households involved in agricultural labour, meanwhile, reported lost employment as the predominant shock (46 percent of households), followed by restrictive measures (15 percent of households) and sickness of a household member (18 percent of households). This suggests that agricultural labourers may have been more vulnerable to movement restrictions and losses in their labour capital in comparison to other groups.

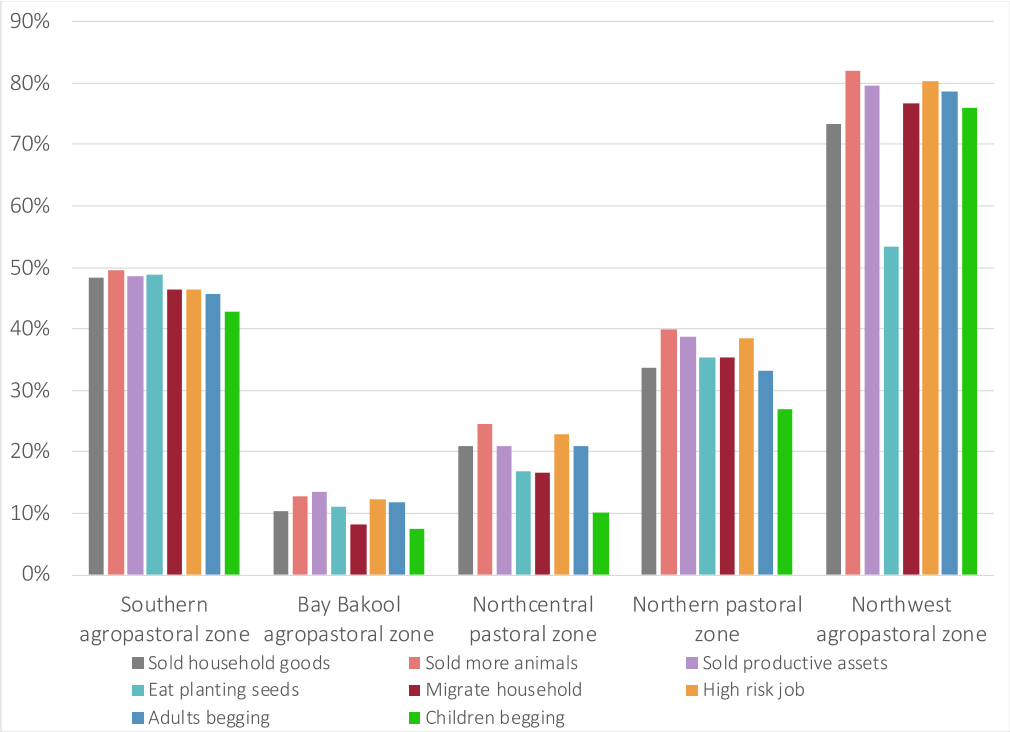
Remittances

In Somalia, remittances are an important income source for many households. Among surveyed respondents, however, only 3 percent of them indicated that remittances were one of their top two income sources. However, this low figure is likely due to the fact that the survey interviewed FAO beneficiaries, who are likely much poorer and vulnerable than the general population. However, an assessment by FSNAU of 11 areas found that, during the April-June 2020 period, urban and IDP households reported a decline between 10 and 30 percent decline in the value of remittances that they received, in comparison to typical levels (FSNAU-Somalia; FEWS NET, 2020c).

Furthermore, household respondents also provided information on whether during the 30 days before the assessment they resorted to coping strategies that they would otherwise avoid as a result of lack of food or money to feed household members. The zones where respondents reported most often resorting to coping strategies were the Northwest agropastoral zone (85 percent of household respondents), followed by the Southern agropastoral zone (63 percent household respondents) and Northern pastoral zone (60 percent of household respondents). On the other hand, coping strategies were less frequently reported in Bay Bakool agropastoral zone (21 percent of household respondents) and the Northcentral pastoral zone (39 percent of household respondents). In the Northwestern agropastoral zone, moreover, the selling of household goods, more animals than desirable and productive assets, in addition to migrating with the entire household, engaging in high risk, socially degrading and exploitative temporary jobs and begging (among adults and children), were also commonly reported as coping strategies, with more than 70 percent of respondents reporting engaging in them.

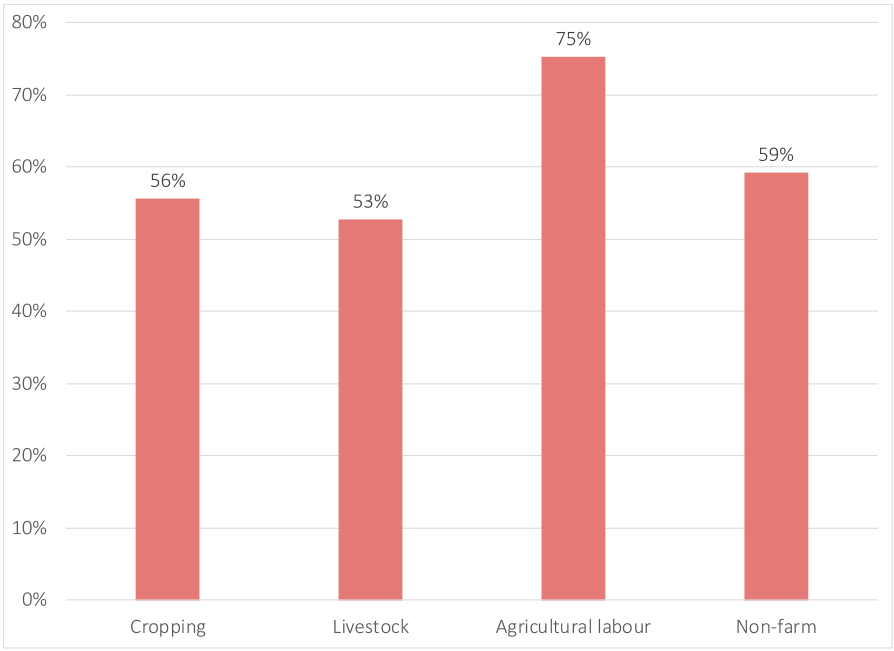
Figure 28. Coping strategies reported by zone

(percent of respondents)



Source: FAO, 2020; FAO assessment results

Figure 29. Coping strategies reported by livelihood activity (percent of respondents)



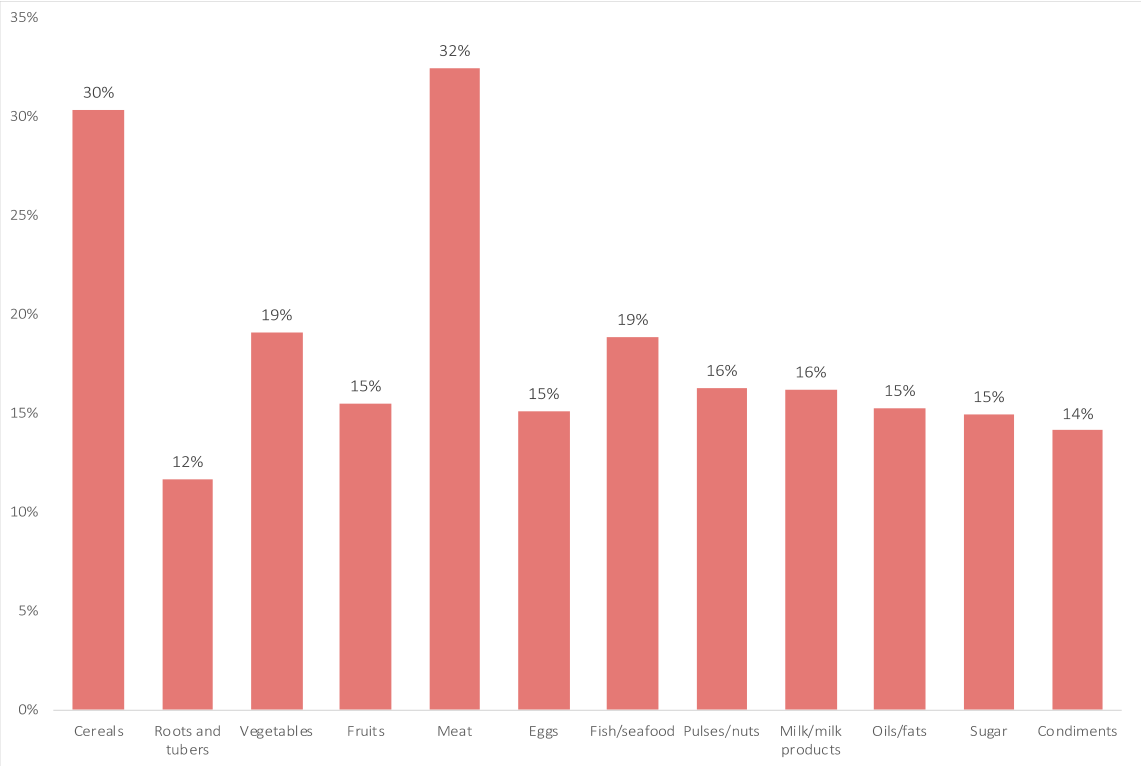
Source: FAO, 2020; FAO assessment results

Broken down by livelihood activity, as shown in Figure 29, households engaged in agricultural labour were much more likely to report engaging in negative coping strategies (75 percent) compared to households engaged in cropping activities (57 percent), livestock production (53 percent), and non-farm activities (59 percent).

Food security

By monitoring changes in consumption of different food groups, a number of trends in current food security levels have been identified. When asked about which food groups households have consumed less of over the past three months compared to usual consumption levels for the same time period last year, 32 percent of respondents indicated reducing meat consumption, 30 percent reduced cereal consumption and 19 percent reduced vegetable and fish and seafood consumption (Figure 30). The reduction in meat consumption can likely be explained by its high market costs in comparison to other food groups, as well as the availability of cheaper substitute foods, such as pulses and vegetables.

Figure 30. Food groups that households consumed less of during the past three months
(percent of respondents)

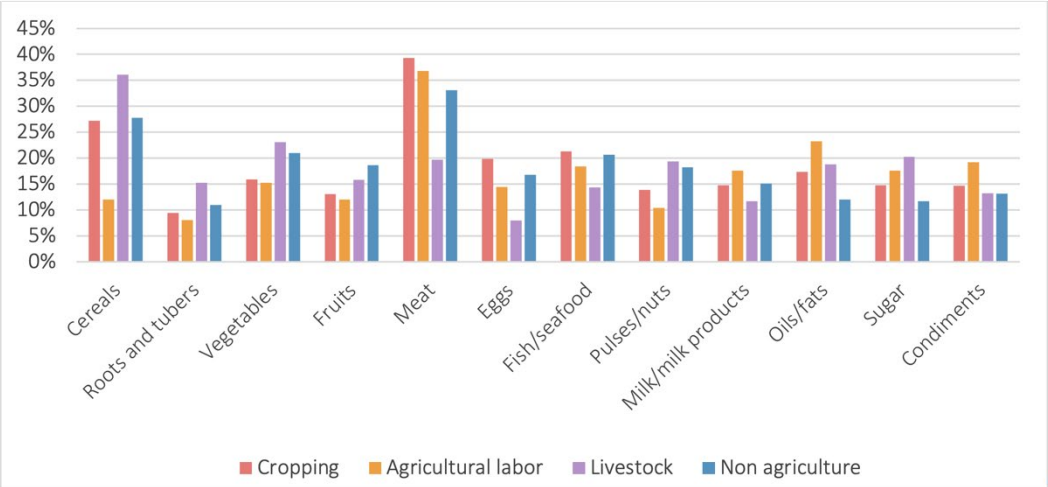


Source: FAO, 2020; FAO assessment results

In this respect, significant variations were observed across zones. In southern agropastoral zones, meat was the food group that the highest percentage of households reported to have consumed less of. Meanwhile, in pastoral zones, it was cereals that the majority of households were consuming less of. What's more, trends in the northwestern agropastoral zones showed that around 40 percent of households reported consuming fewer fruits, meats, fish and seafood and condiments).

Broken down by livelihood activity, as shown in Figure 31, livestock-rearing households most commonly reported cutting down their cereal consumption while all other groups reported a predominant cut in meat consumption.

Figure 31. Reduced consumption of food groups during the past three months, by livelihood activity



Source: FAO, 2020; FAO assessment results

Food Insecurity Experience Scale

In measuring the severity of recent food insecurity experienced by the households concerned, the survey included the standard Food Insecurity Experience Scale (FIES) module, adapted for use with a 30-day recall period. FIES data allows for the measurement of the severity of food insecurity experienced by each household through eight questions relating to the occurrence of experiences and conditions typically associated with food insecurity. In turn, given reference thresholds, households are classified into different food insecurity classes, with the percentage in each class used as an estimate of the prevalence of food insecurity among specific groups.

Table 2 below outlines the prevalence of moderate and severe food insecurity, as defined by FAO in the context of the global Sustainable Development Goals (SDG) monitoring for the entire sample and for households grouped by zones and regions.[5] The column labelled $RFI_{mod+sev}$ reflects the total percent of households classified as facing either moderate or severe food insecurity, in line with SDG Indicator 2.1.2. The column labelled RFI_{sev}, on the other hand, reflects only the percentage of households facing severe food insecurity.

Though no formal comparison can be made at this stage, as FIES data have never been analysed in the context of IPC classification processes, it is worth noting that the thresholds defined at the global level for use in SDG monitoring are significantly lower than those used for Crisis (IPC Phase 3) or worse food insecurity by the IPC (discussed in more depth in the following *Outlook* section). Therefore, the percentages of households with moderate or severe food insecurity are typically higher when assessed using the FIES methodology.

[5] Given that the household survey component only interviewed FAO beneficiaries, the FIES data is not representative of the population as a whole in each region, zone, or at the national level and is likely heavily skewed towards households active in subsistence agriculture.

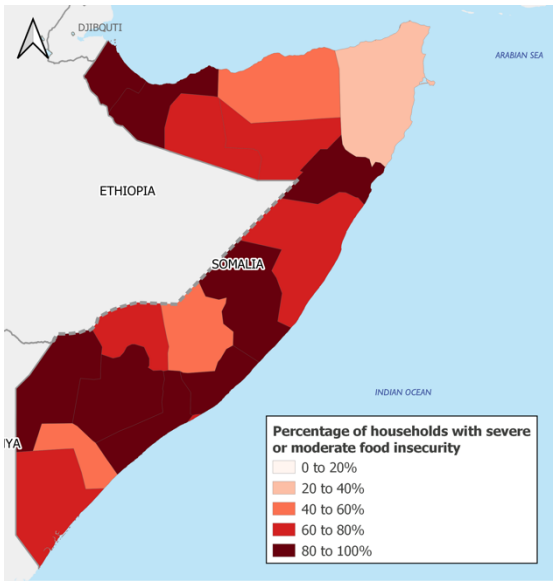
Table 2. Prevalence of moderate and severe food insecurity amongst assessed households, disaggregated by zone and by region

	$RFI_{mod+sev}$	RFI_{sev}
Total sample	**74.3 (±2.6)**	**53.5 (±2.7)**
Northwestern Agropastoral	**89.4 (±5.6)**	**72.8 (±6.6)**
Awdal	87.9 (±8.7)	70.8 (±9.4)
Woqooyi Galbeed	90.9 (±7.0)	74.6 (±9.3)
Northern pastoral	**69.7 (±7.1)**	**50.5 (±7.1)**
Sanaag	52.1 (±13.5)	35.8 (±12.2)
Togdheer	78.8 (±10.6)	56.5 (±12.1)
Sool	78.6 (±10.9)	59.4 (±11.5)
Northcentral pastoral	**68.9 (±5.7)**	**45.6 (±5.6)**
Bari	36.6 (±10.1)	12.8 (±7.3)
Nugaal	84.6 (±8.1)	47.0 (±9.6)
Mudug	75.7 (±11.28)	57.7 (±11.0)
Galgaduud	84.2 (±9.9)	70.2 (±10.3)
Bay Bakool agropastoral	**79.6 (±7.2)**	**52.3 (±8.2)**
Bay	90.3 (±6.6)	62.8 (±9.9)
Bakool	66.6 (±12.7)	39.8 (±12.6)
Southern agropastoral	**73.8 (±4.3**	**54.1 (±4.3)**
Hiraan	59.6 (±12.2)	33.1 (±11.2)
Middle Shabelle/Shabelle Dhexe	82.2 (±9.3)	58.2 (±11.1)
Lower Shabelle/Shabelle Hoose	91.3 (±7.2)	77.8 (±8.6)
Banaadir	74.9 (±12.1)	55.3 (±12.1)
Gedo	86.2 (±8.7)	63.8 (±9.8)
Middle Juba/Juba Dhexe	46.9 (±14.2)	31.4 (±11.2)
Lower Juba/Juba Hoose	72.3 (±10.5)	55.5 (±10.3)

Source: FAO, 2020; FAO assessment results

As seen from Table 2, the prevalence of food insecurity is significantly higher than average in the regions from the northern agropastoral zone. These findings are consistent with the observation before that this zone had one of the highest percentages of households reporting negative coping strategies. In other regions, food insecurity levels are relatively more favourable in Bari, Middle Juba, Hiraan, Sanaag and Bakool. These account for the only regions where the survey revealed that less than 40 percent of the assessed households were experiencing severe food insecurity. Figure 32 below depicts the geographic distribution of the percentage of households facing food insecurity levels.

Figure 32. Percentage of households with severe or moderate food insecurity levels



Source: FAO, 2020; FAO assessment results

Outlook

According to the results of the post-*Gu* technical release, the favourable 2020 *Gu* rainfall season had beneficial impacts on food security and the livelihoods of most pastoral households. Nonetheless, other poor pastoral households in northern and central Somalia will continue to face medium to large food consumption gaps due to their reduced livestock holdings that aided in coping with the current and forecasted shocks through the end of 2020. In agropastoral livelihood zones, irregular rainfall, prolonged drought and desert locust outbreaks resulted in significant reductions in household stocks and income from the 2020 *Gu* season cereal harvest and from agricultural employment. As such, some poor agropastoral households will face medium to large food consumption gaps through the end of 2020 due to these unfavourable factors. Moreover, due to the destructive flooding recorded in the country that led to significant crop and income losses from agricultural employment, a significant proportion of poor households in riverine livelihoods will face medium to large food consumption gaps during the remainder of 2020.

In this respect, food insecurity levels are expected to worsen among poor households with limited livestock numbers or low capacities to manage harvest losses between October and December. At the same time, Crisis (IPC Phase 3) outcomes are expected to be less widespread than previously projected due to recent and forecast livestock births, favourable livestock prices and demand and stable imported food prices (FSNAU Somalia/FEWS NET, 2020b). Food security is also expected to worsen among IDPs, with Crisis (IPC Phase 3) outcomes anticipated across most of the main IDP settlements and, what's more, a large proportion of IDP households are unable to meet their minimum food requirements without external assistance (Ibid.).

According to the latest IPC snapshot (July–December 2020), 2.1 million people in Somalia are expected to face outcomes of Crisis or worse (IPC Phase 3 or higher) between October and December 2020. In turn, an additional 3 million people are expected to be Stressed (IPC Phase 2), bringing the total number of people facing acute food insecurity to 5.1 million.[6] In addition, 849 900 children under the age of five are likely to be acutely malnourished through August 2021 (IPC-GSU, 2020).

[6] IPC food security map available at: http://www.ipcinfo.org/ipcinfo-website/resources/resources-details/en/c/1152884/

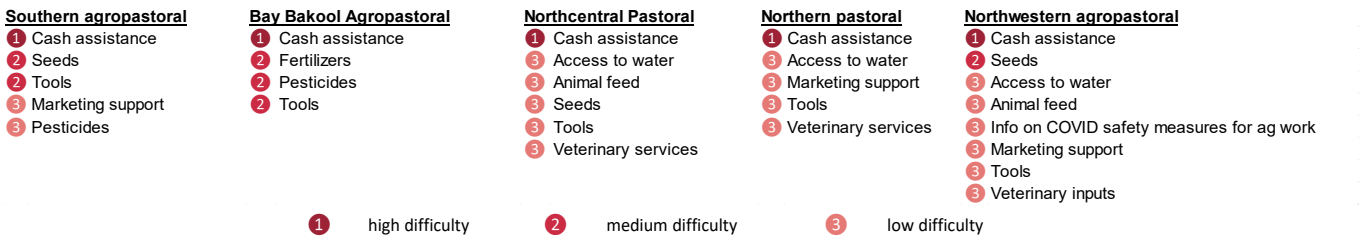
Most affected population groups and needs

The 2.1 million people in Somalia who are in a situation of Crisis or worse in terms of food insecurity (IPC Phase 3+) require urgent action to prevent food consumption gaps and acute malnutrition. In addition, the 3 million people in a situation of Stressed food insecurity (IPC Phase 2) require livelihood support programmes to protect their livelihoods and prevent future deteriorations to their food insecurity levels.

Most of the households who were interviewed indicated they would require additional livelihood assistance to boost their crop and livestock production during the three months following the assessment. As shown by Figure 33, households in all areas had a strong preference for cash transfer programmes, with the highest number of households indicating that cash represented their most urgent assistance need in all areas.

Other assistance needs required by households varied between areas. For instance, households in agropastoral areas leading towards assistance to support crop production, such as seeds, tools, fertilizers and pesticides, while households in pastoral areas showed a tendency to report their needs in terms of livestock production assistance, such as facilitating access to water, obtaining animal feed and accessing veterinary services and inputs. Overall, marketing support for agricultural products was also commonly identified as a crosscutting need.

Figure 33. Priority needs by region, according to interviewed respondents



Source: FAO, 2020; FAO assessment results

Conclusion

Somalia's rural population currently faces a variety of challenges that threaten agricultural production and livelihoods and drive elevated levels of food insecurity.

With cropping households experiencing below-average *Gu* harvests this year because of several hazards including climatic shock, such as poorly distributed rainfall that included heavy rains and flooding during certain periods as well as dry spells at other times, crop pests and conflict and insecurity, many of these households have indicated that they were planning to plant reduced land area in crops for the upcoming *Deyr* season in comparison to normal, which could threaten future production levels and food security. In addition to climatic shocks, a lack of income to hire labour and buy seeds and fertilizer, as well as market-related difficulties, such as low prices and demand and high transportation costs have been expressed as challenges during 2020 and moving forward.

In 2020, pastoral households in Somalia generally benefited from well above-average rainfall during this year's *Gu* season, which replenished water and pastoral resources and drove favourable livestock body conditions and prices. However, similar to cropping households, livestock producing households indicated numerous challenges, including market issues and difficulties accessing veterinary services, feed, pasture and water.

Most interviewed households reported that their incomes overall had decreased during the past three months, approximately from June to August, compared to the same time last year with households involved in non-farm activities being more likely to report declines in comparison to households active in cropping, livestock or agricultural labour. This suggests that households involved in the agricultural sector may have been slightly less exposed to COVID-19-related income shocks in comparison to those involved in non-farm activities.

The COVID-19 pandemic did not have any major impacts on the price of locally produced food staples, though a brief increase in imported rice prices during the months of April and May were observed, likely linked to COVID-19 disruptions to global rice markets, panic buying in Somalia and increased demand during the month of Ramadan. COVID-19 related impacts on livestock exports to the Middle East from Somalia were not as severe as previously anticipated. Conversely, livestock exports were relatively stable this year, and livestock prices remained well above average. The high livestock prices likely offset the impacts on food access that the rise in imported rice prices could otherwise have had in pastoral areas.

Applying the FIES module to measure the severity of recent food insecurity experienced by the assessed households, adapted for use with a 30-day recall period, 74.3 percent of households experienced moderate or severe food insecurity while 53.5 percent experienced severe food insecurity. Against this backdrop, the prevalence of food insecurity was found to be significantly higher than average in the regions that belong to the northern agropastoral zone.

Recommendations

- With 2.1 million people facing a food insecurity situation of Crisis or worse (IPC Phase 3+), they require urgent action to prevent food consumption gaps and acute malnutrition. Populations in Stressed or above food insecurity levels (IPC Phase 2) also require livelihood support programmes to protect their livelihoods and prevent future deteriorations in their food security.
  To this end, interviewed households in all areas indicated a strong preference for cash programmes.

- In addition, low levels of resilience and chronic challenges to the agricultural and livestock sectors were found to be key issues facing many rural households. Consequently, support programmes that improve food availability at the household level and stabilise access for the most food insecure populations alongside with resilience building are required. This could include activities that enhance access to agricultural and livestock assets, complemented by advisory services including agropastoral field schools. Particular attention shall be given to the reduction of post-harvest losses by enhancing post-harvest technologies, such as improved storage techniques and structures at farm or household levels, as well as through the promotion of improved technologies for milling and processing. Developing local feed and farming input supply modalities, such as the establishment of community seed production systems, the rehabilitation of pasture and degraded land sand and the organization of farmers into producer groups are other key aspects worthy of consideration.

- Moreover, given that households involved in the agricultural sector seem to have been slightly less exposed to COVID-19-related income shocks in comparison to those involved in rural non-farm activities, support programmes should be provided to populations who abandoned agriculture because of conflict or the effects of the 2016/17 drought but are interested in re-entering the sector as they would likely strengthen household resilience and food security.

- In order to ensure that food supply chain actors are not at risk of COVID-19 transmission, locally dedicated awareness raising at distribution points and markets should be undertaken. Additionally, revised modalities for agricultural extension and protocols to comply with hygiene and safety measures during planting, harvesting and selling will need to be implemented. The support on the implementation of sanitary and phytosanitary measures in the downstream value chain, such as at animal slaughterhouses, trade points and during transportation of food) should also be strengthened and intensified.

- Given the frequency of hazards affecting rural areas of Somalia, strengthened early warning systems are needed to inform more timely and appropriate anticipatory actions in advance of future shocks. Additionally, close monitoring of upcoming *Gu* seasonal forecasts is needed as *Deyr* seasonal performance to date has been mixed.

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