

SUDAN Food Security Outlook Update

May 2010

Food insecurity to increase as lean season peaks

- In northern Sudan, over 5 million people in Darfur, Red Sea State, southern parts of South Kordofan State, and parts of Blue Nile, Kassala, and North Kordofan states face moderate and high levels of food insecurity due to last year's poor harvests and ongoing conflict in Darfur.
- Food insecurity is expected to worsen in these areas from July to September, with the peak of the lean season in August, as food stocks are depleted before the next harvest in October. Cereal prices are expected to peak during July to September and population displacements are expected to continue during this period in Darfur due to insecurity.
- In southern Sudan, the most food insecure populations are located in Jonglei, Warrap, Northern Bahr el Ghazal, and Eastern Equatoria states, where food reserves were exhausted earlier than normal. Food security conditions between May and June are expected to worsen as the lean season peaks.
- Food security in southern Sudan is expected to improve from July to September in the April – July cropping areas of Western, Central, and Eastern Equatoria states, where the harvest is expected in July. Slight improvements are also expected during September in the other seven states, when consumption of early maturing crops begins. However, improvements are unlikely for 260,000 – 300,000 people who remain displaced.

Updated food security outlook through September 2010

In northern Sudan, food security conditions are expected to deteriorate during July – September in North, West, and South Darfur; Red Sea; South Kordofan; Kassala; and North Kordofan. The lean season, which started earlier than normal, is expected to peak in August, and is driven by the impacts of the poor 2009/2010 harvest, chronic food insecurity, continued conflict in Darfur, high food prices, and reduced cash crop production. The rainy season (June–September) is expected to disrupt access to markets, thereby further reducing grain supplies, and increase waterborne diseases and rates of malnutrition, which tend to peak in August among children under five. A recent report by the Sudanese Humanitarian Aid Commission (HAC) warned of possible increased rates of

Figure 1. Most likely scenario, May–June, 2010

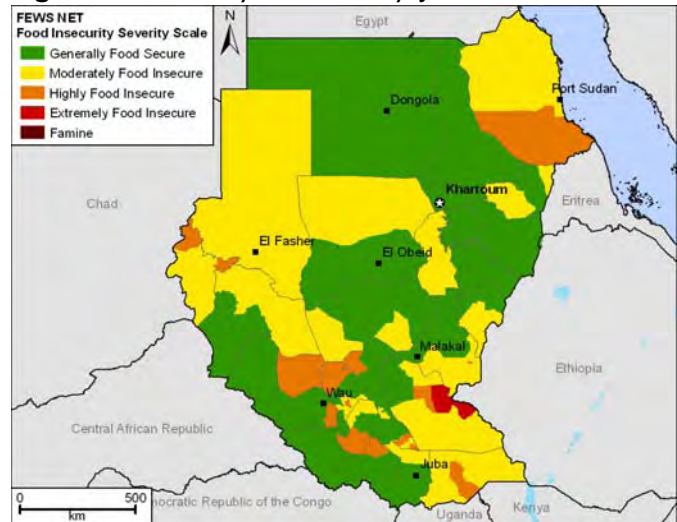
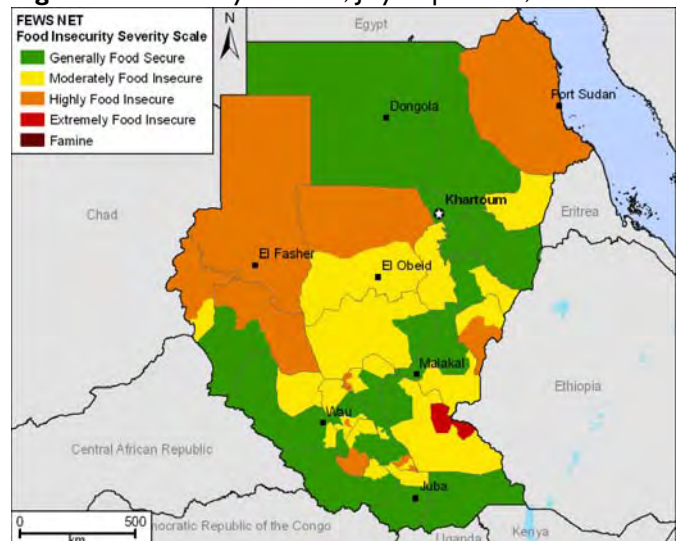


Figure 2. Most likely scenario, July–September, 2010



For more information on FEWS Net's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

This report provides an update to the April 2010 FEWS NET Food Security Outlook report which estimated food security conditions in Sudan through September 2010. The next Outlook report will be released in July and will cover the July to December 2010 period.

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malnutrition over the lean season, in line with typical seasonal patterns at this time of year. Food aid distributions are underway and seasonal support to drought-affected populations in north Sudan have started earlier (January/February) than usual (May/June); however WFP has projected a significant pipeline break in August 2010 due to funding shortfalls.

In **Darfur**, the security situation has deteriorated considerably in May compared to April. Recent fighting has been reported between Justice and Equality Movement (JEM) and Government of Sudan forces in the Jebel Moon area in the northern parts of West Darfur State, eastern parts of South Darfur State, and southern parts of North Darfur State. In addition, escalated tribal conflict between Messeriya and Rezighat pastoral communities in south/east parts of West Darfur State and the south/west of South Darfur State has caused a new wave of displacement to Mukjar (14,000 people), Bendesi (1,000 households) and Zalingi (4,352 households) in May 2010, and this trend is likely to continue over the coming months. Prevailing insecurity conditions in Darfur continue to prevent people from engaging in typical livelihood strategies such as firewood/grass collection, seasonal migration for labour, and wild food collection. The recent collapse of *Al Muwaseer* market in EL Fasher town, the capital of North Darfur State, is an additional shock to the already war-devastated economy in Darfur, where many households have lost their cash and physical capital. In addition, farmers in North Darfur State have cited shortage of seeds as a major constraint in cultivation during the next rainy season.

Cereal prices continued to rise and remain much higher than the five-year average in April (Figure 3). Moreover, food and cereal inflation rates have continued to rise both in rural and urban settings. The typical seasonal behavior of prices has also changed throughout 2009/10. Prices increased all through the year even during the harvest season of October – December when cereal prices usually decline. The highest increase for sorghum (*fatarita*) prices in April was recorded in El Fasher market in North Darfur State and Port Sudan market in the Red Sea State, where sorghum prices have increased by 69 percent and 25 percent in April compared to March 2010, respectively.

Livestock are facing pasture and water shortages in drought-prone areas of **Darfur, North Kordofan, and the Red Sea State**. However, livestock maintained high prices in the first quarter of 2010 due to high demand for export. Consequently, livestock/cereal TOT have remained satisfactory (in spite of sharp increases in cereal prices during the same period) or further improved in favor of livestock owners/traders (Figure 4). The onset of the early rains in May in some parts of the country is expected to improve availability of pasture and water for animals. According to ECMWF and NOAA, rainfall during July to September is expected to be normal to above-normal in north Sudan.

In **southern Sudan**, food insecurity is expected to worsen between now and the end of August, and then start improving in September following maturation and onset of consumption of early maturing crops of maize, sorghum and vegetable crops. Food security conditions are expected to improve significantly in the April–July season cropping areas that are located in the Eastern, Central and Equatoria States (Hills and Mountains, Pastoral and the Greenbelt Zones- Figure 5). Meanwhile, livestock/cereal terms of trade that have been on the decline since the middle of last year are expected to persist until the main September harvest. On May 14, 2010, the Southern Sudan Council of Ministers declared a tax exemption on essential major food commodities. This might result in price reductions, especially for staples of sorghum and maize, thus benefiting households that heavily rely on food purchases. However, it is still early to determine what the impact of the tax exemption on households will be. This requires continued market monitoring and price analysis in the coming months.

Figure 3. Monthly Inflation Rate in Sudan (Base 2007=100%), April 2009 – April 2010

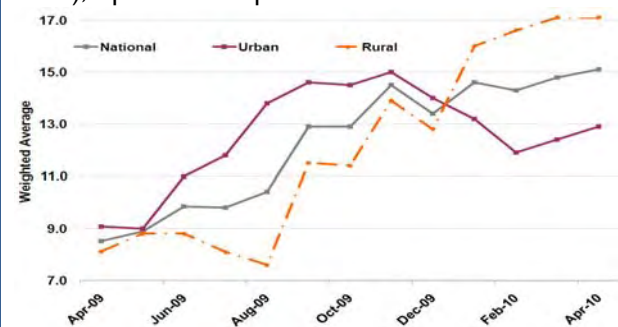
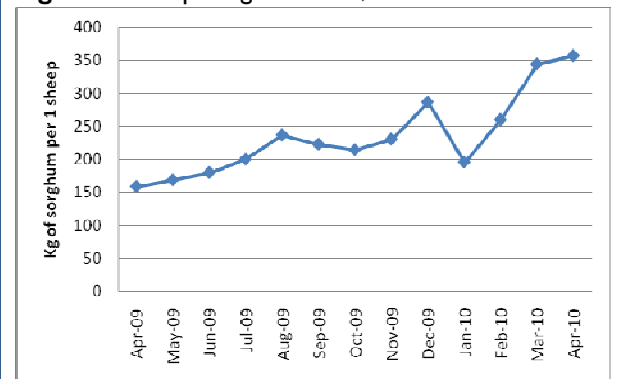


Figure 4. Sheep/Sorghum TOT, Khartoum market



Source: SIFISA N Sudan

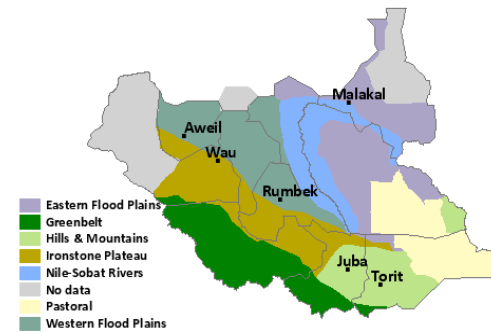
March weather conditions reported by some locations showed optimism for a timely start of the first cropping season areas, but rainfall received during April was below normal, particularly in Eastern Equatoria (Figure 6). This has potentially negative implications for the April-July cropping areas, particularly Eastern Equatoria, which has had two poor consecutive cropping years. However, normal to above-normal rainfall for June – August rainfall is projected for southern Sudan by ECMWF and IRI, which could mitigate the impact of April shortfalls in the April – July cropping areas and increase chances for a timely onset of rains in the June-September/November cropping season areas. Remotely sensed data illustrates improved rainfall conditions in the April-July cropping areas during early May (Figure 7).

In the **Eastern Flood Plains Zone**, food security conditions continue to decline, particularly in **Akobo, Wuror and Nyirol counties in Jonglei State**, where a reduction of 2009 crop yields worsened by a 30 percent and 40–50 percent reduction in access to fish and wild foods, respectively, has exacerbated lean season food shortages. Findings of a Norwegian Peoples Aid (NPA) food security assessment in early April in Nyirol, Wuror and Ayod counties indicate significant fish and wild food reductions, and grain stocks for poor households ran out in April. Consequently, poor households are expected to face significant food shortages during May-August. NPA noted a decline of sorghum prices in early April, possibly due to increased food deliveries by WFP during the pre-elections period. However, sustained price declines throughout the lean season are unlikely as demand for grain increases. Also, traders supplying the markets with grain are constrained by the lack of cash, poor roads, high transport costs, and poor storage facilities. The NPA assessment also highlights severe dry season water shortages, accompanied by many diarrhea cases among children and deteriorating nutrition conditions.

In the neighboring area of **Akobo County**, global acute malnutrition (GAM) and severe acute malnutrition (SAM) levels of 45.7 percent (WHZ<-2SD, WHO 2006) and 15.5 percent (WHZ<-3SD, WHO 2006), respectively, were recorded during March – April. The GAM rate greatly exceeds the WHO emergency threshold of 15 percent and is more than double the rate found by an ACF survey during a 2005 crisis. Malnutrition in these areas is strongly linked to multiple factors such as poor hygiene and sanitation practices, serious water shortages, and food deficits. Malnutrition rates are typically high in this area, particularly at this time of year. For example, comparable levels of malnutrition in Akobo were recorded in May 2002 with GAM and SAM levels of 39.9 percent and 9.8 percent, respectively, although fish, wild plants, and game were readily available during 2002 compared to this year. Nonetheless, current levels are a significant cause for concern, especially given that food insecurity is expected to persist in this area over the coming months, particularly for households that remain displaced in Akobo. These households are unlikely to return to their homes and might miss the June-September cropping season. However, some improvements are expected in counties outside Akobo around September, with consumption of early maturing crops.

In the **Western Flood Plains Zone** (Northern Bahr El Gazal, northern parts of Warrap States and pockets of internally displaced in Lakes State), where the hunger season has started earlier than normal by two months, the lack of food stocks will exacerbate food shortages during May – August, and could constrain crop cultivation capacity of affected households. However, slight improvements are expected in all of these areas in September with consumption of early maturing crops, with the exception of households displaced by cattle raiding and livelihood conflicts. Displaced households in Gogrial, Tonj, Rumbek, Cuibet, Mayom, and Yirol East counties are likely to remain food insecure even during harvesting of early crops due to continued displacement and inability to cultivate, and loss of assets such as livestock and productive domestic tools. Increasing intertribal cattle raiding conflicts between Dinka and Nuer along the Warrap, Unity and Lakes States borders (up to 20 raids in April) could increase food insecurity, especially in Mayom, Twic, Abiemnom, and Payinjiar counties. Western Flood Plain areas affected include Turalei in Twic, Tonj East, Tonj South, Cuibet, Pagarau (Yirol East), Rumbek North, and

Figure 5. Southern Sudan Livelihood Zones



Source: FEWS NET

Figure 6. Percent of normal rainfall April 3 – May 2, 2010

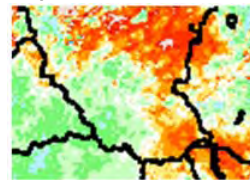
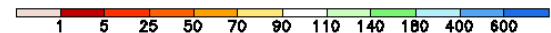
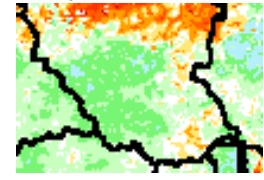


Figure 7. Percent of normal rainfall April 12 – May 11, 2010

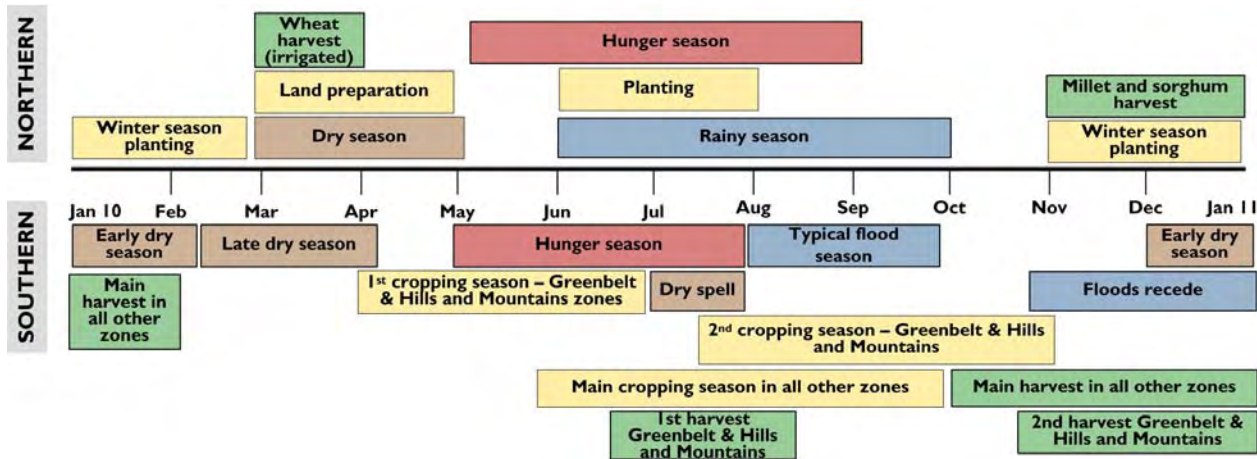


Source: NOAA-CPC

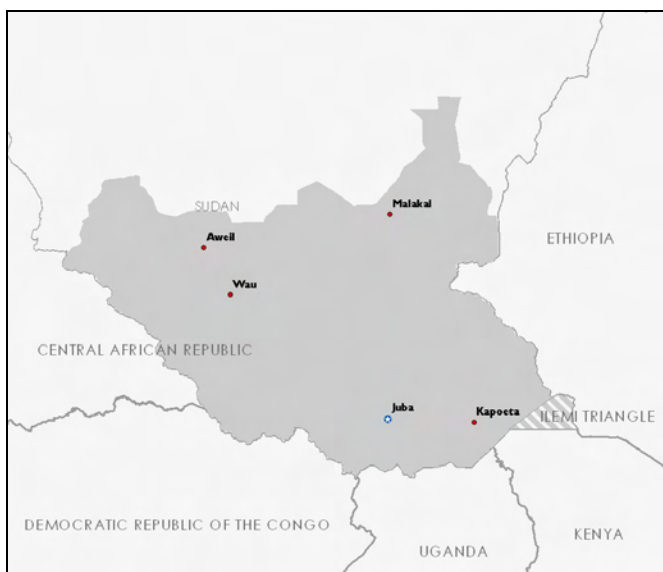
Rumbek North, while Nile-Sobat Zone areas affected include Mayom, Abiemnom, Payinjiar, and Mayendit. The fighting could seriously constrain cultivation activities if it extends to June.

Displaced households in the **Ironstone Plateau Zone areas of Jur County’s Kuajina area, Wullu, Mundri, and Mvolo** will potentially remain between moderately and highly food insecure up to September due to continued displacement since 2009. In the **Hills and Mountains Zone (Torit and Budi counties)**, food insecurity has persisted since August last year due to near failure of the first cropping season, the main season in most areas in this zone. As of March, there were reports of some households in Budi County having migrated into Uganda in search of food. It is not clear whether households that recently migrated to Uganda have returned to their homes. There are rising concerns over potential increases in Uganda-originated Lord’s Resistance Army (LRA) attacks in the **Greenbelt Zone**, after reports of attacks in Ezo, Tambura and Nzara counties during April-May. Similar LRA attacks in 2008 – 2009 displaced over 85,000 people in this zone. Resumption of attacks poses a threat to the April-July cropping season, where weeding is approaching the peak.

Seasonal calendar and critical events



Source: FEWS NET



Monthly prices are supplied by the WFP VAM.

Southern Sudan: Sorghum and maize flour are important to all households in southern Sudan, while wheat flour and groundnuts are mostly purchased by urban households. Wau and Aweil are the main markets in and around chronically food insecure areas. Malakal is the main market of Renk, a key sorghum surplus producing area. Juba is the capital city market and is also a transshipment point between borderline food insecure and surplus areas. Kapoeta is located in a predominantly pastoral region representing the food security conditions in this area as well as the cross border trade between Sudan and Kenya.

NOTE: The units prices are now being collected in has changed from large bags (45 – 90 kg) to small bags (3.5 kg), meaning data is not exactly comparable between April and May 2009 when the change took effect. FEWS NET has converted all prices in per kilogram units for use in graphing.

