SUDAN Food Security Outlook — October 2019 to May 2020

Agricultural prospects generally favorable, except in flood-affected areas of Sudan

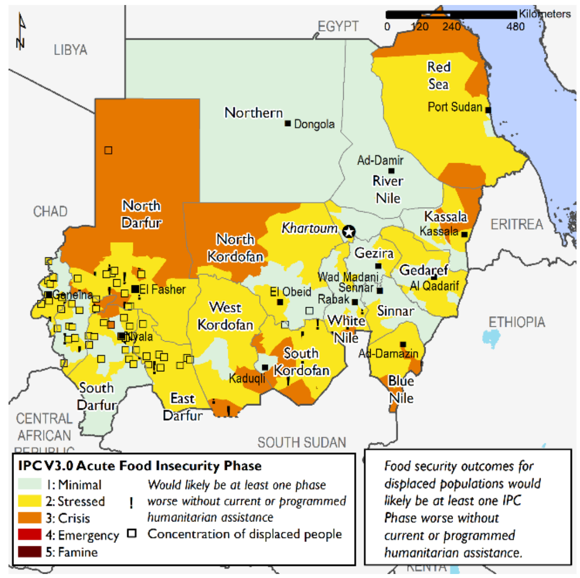
KEY MESSAGES

- High staple food prices resulting from significant macroeconomic difficulties, combined with persistent insecurity in conflict-affected areas and flooding late in the rainy season, are contributing to higher than normal emergency food assistance needs in Sudan in late 2019. These needs are expected to persist into at least May 2020, particularly as the lean season approaches in agricultural and agropastoral areas.

- Agricultural harvests starting in October 2019 are expected to be average to slightly above average at the national level. In the near term, these harvests should contribute to improvements in food access. Between October 2019 and January 2020, most areas of Sudan will face Minimal (IPC Phase 1) or Stressed (IPC Phase 2) acute food insecurity, although parts of South Kordofan, Jebel Marra in Darfur, parts of Red Sea White Nile and northern Kassala will be in Crisis (IPC Phase 3).

- Increased number of IDPs and poor households in areas most affected by insecurity will face increased difficulty meeting their food needs as the lean season approaches. Continued depreciation, increasing staple food prices, and early exhaustion of staple food stocks in flood-affected areas are likely to drive the need for increased humanitarian assistance February and May 2020. Parts of South Kordofan, Jebel Marra in Darfur, and parts of Blue Nile, White Nile, North Darfur, South Darfur, Kassala, and Red Sea states will be in Crisis (IPC Phase 3) between February and May.

Current food security outcomes, October 2019



Source: *FEWS NET*

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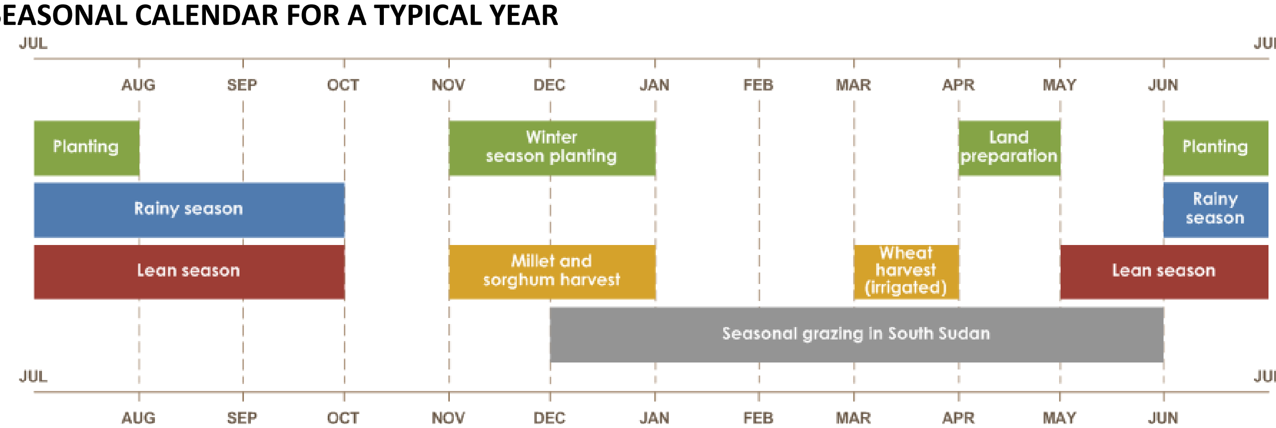
SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: *FEWS NET*

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NATIONAL OVERVIEW

Current Situation

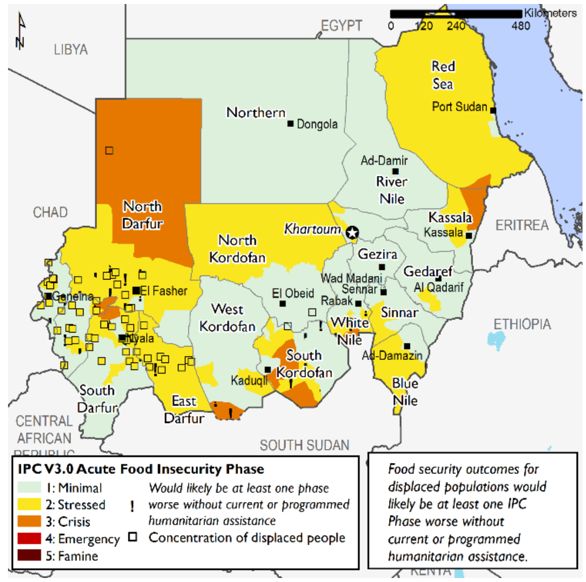
According to CHIRPS and Sudan Metrological Authority (SMA) Rainfall in Sudan has been persistently above average throughout most of the 2019 season, and the season has continued in October past its normal end in September. According to CHIRPS satellite-derived rainfall estimates, rainfall during the first half of October has been more than 45 percent above average and field reports indicate rainfall has continued into late October.

According to preliminary findings from the recently conducted inter-agency mid-season assessment, which covered 14 out of the 18 states in Sudan, area planted in sorghum and millet in these states is estimated to be eight percent lower than last year, but slightly above the five-year average. Compared to last year, the reduction in the area planted for cereals is correlated to a significant expansion in the area cultivated for cash crops. This is reportedly due to significant increases in the prices for cash crops. The area planted sesame and groundnuts, two key cash crops, is expected estimated to be approximately 10 percent higher than last year, and 70 and 49 percent higher than the five-year average for sesame and groundnut respectively.

Above-normal rains continue to facilitate favorable crop development in agricultural and agropastoral areas of Sudan. Crop growth is varied between crop types and areas according to sowing dates. As of September, most cereal crops in the rain-fed semi-mechanized and irrigated sectors were at the early vegetative growth but were at advanced vegetative growth in the rain-fed traditional sector. Sesame and groundnuts are at the flowering and at the pod and fruit setting stage.

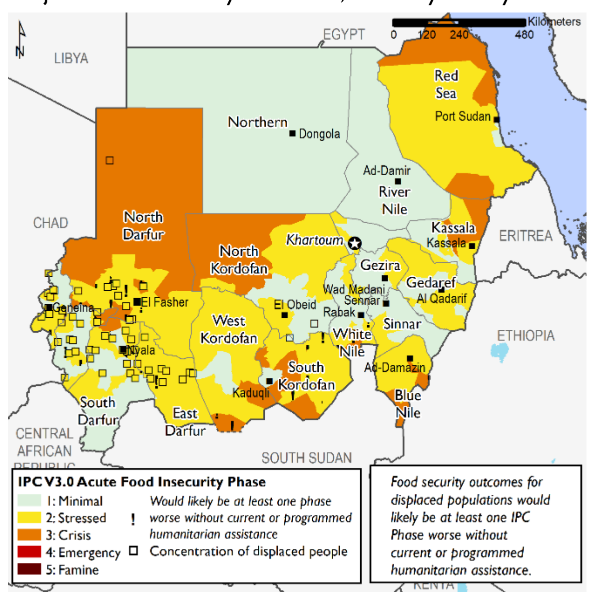
Above-normal rains continues to facilitate favorable pasture regeneration and improved availability of water for animals in pastoral and agropastoral areas of Sudan. As of late October 2019, much higher than normal vegetation conditions have been reported across the eastern and western parts of the country including most parts of Darfur region, Kassala, Jazeera and scattered areas in Gadaref and Sennar as a result of appreciable rainfall amounts during early and mid-August.. However, drier than average conditions during late July in parts of North Kordofan and the White Nile states caused widespread deterioration in vegetation development in early and mid-August. Also, much higher than average rainfall during end-August resulted in increased flooding and waterlogging and caused below normal vegetation performance. However, the expansion of cultivated areas into grazing lands and closure of some of the main animal seasonal migratory routes in many areas including greater Kordofan, Greater Darfur Sennar, Blue Nile White Nile and Kassala states, has significantly constrained seasonal migration of animals. This has led to overgrazing and increased animal infections as a result of waterborne disease.

Projected food security outcomes, November 2019 to January 2020



Source: *FEWS NET*

Projected food security outcomes, February to May 2020



Source: *FEWS NET*

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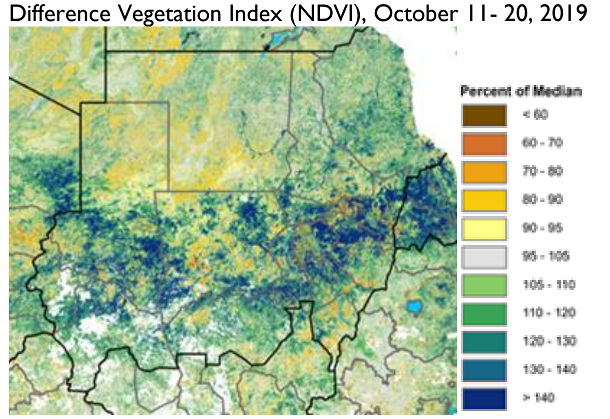
Intensive heavy rains during August and September resulted in above-average flooding and waterlogging in many of the major flood-prone zones of Sudan. This includes areas in parts of Khartoum, Kassala, El Gezira, Red Sea, River Nile, Greater

Darfur, and Greater Kordofan states. In these areas, reports by the Humanitarian Aid Commission (HAC) and OCHA have indicated flooding has caused loss of lives and livelihood assets including livestock, damage to homes, infrastructure and considerable damage to cropped areas.. As of September 19, 2019, an estimated 364,200 people have been affected by heavy rains and flash floods across 17 states and the Abyei area of Sudan according to Humanitarian Aid Commission (HAC) and partners in Sudan. In total, an estimated 45,104 homes have been destroyed and 27,742 homes damaged. According to the preliminary findings of the recently conducted mid-season assessment, over 2,293,000 feddan (963,445 hectares), or approximately 4 percent of total area cultivated this season, has reportedly been affected by flooding this season as of September 2019. Losses of livelihood assets, including livestock, have been reported in some of the affected areas.

Despite the formation of transitional government in August 2019 following eight months of social and political unrest in Sudan, poor macroeconomic conditions persist in October 2019. Shortages of fuel and cash continued to be reported, alongside continued depreciation of the Sudanese Pound and high inflation. The official exchange rate in October 2019 is 45 SDG/USD, but on the parallel market the exchange rate is 76 SDG/USD. This compares to a parallel market exchange rate of 69 SDG/USD in September 2019, and 70 SDG/USD in April 2019. The continued local currency depreciation and increased shortage of hard currency continues reducing the ability of both the private sector and the government to import required essential food and non-food items including wheat flour, fuel, and medicine.

Figure 1. eMODIS 250m percent of median Normalized Difference Vegetation Index (NDVI), October 11- 20, 2019



Source: *USGS/FEWS NET*

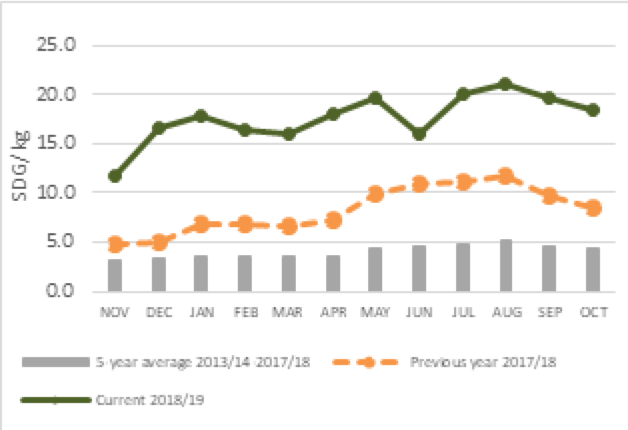
The retail prices of the main staple foods, sorghum and millet, has shown mixed trends in Sudan during September and October, which marks the end of the lean season and the beginning of the harvest season. Sorghum and millet prices have increased seasonally by 10-20 percent in most markets, although a few markets saw stability or even slight decreases in prices. In general, sorghum and millet prices remain 50-75 percent higher than in October 2018 and 225-275 percent above the recent five-year average (Figures 2 and 3).

The retail price for locally produced wheat remained relatively stable in most markets while increasing 5-15 percent in the main wheat consumption markers and slightly declined in markets with low demand during September 2019. Current wheat prices remained 56 percent above last year and 265 percent above the five-year average. This is despite the fact that international wheat prices are approximately 17 percent lower than at the same time last year. High prices for imported wheat in Sudan are being driven by high transportation costs, as well as impacts on prices due directly to the reduced value of the Sudanese Pound. and shortages and associated high cost of wheat and wheat flour import due to the continued depreciation of the Sudanese pound prices of imported wheat and wheat flour.

Agricultural labor opportunities and wages have increased with the progression of agricultural season. Labor opportunities have increased due to replanting in areas affected by flooding and waterlogging as well as in areas where harvests of sesame and groundnut began earlier than usual. Labor wages increased 10-20 percent between September and October in El Obied and Kassala while remained stable in El Fasher. Labor wages in October 2019 are 20-30 percent higher than in October 2018 in most markets. In some markets such as Kosti, Nyala and Kassala, labor prices are almost double their October 2018 levels and 250 percent above the recent five-year average. As a result, the labor wage-to-sorghum terms of trade (ToT) increased 10-20 percent in most markets between September and October 2019, as labor wages increased, and sorghum prices remained stable or decreased slightly. Nevertheless, labor-to-sorghum ToT remained 30-50 percent below average as cereal prices remain well above average (Figure 4).

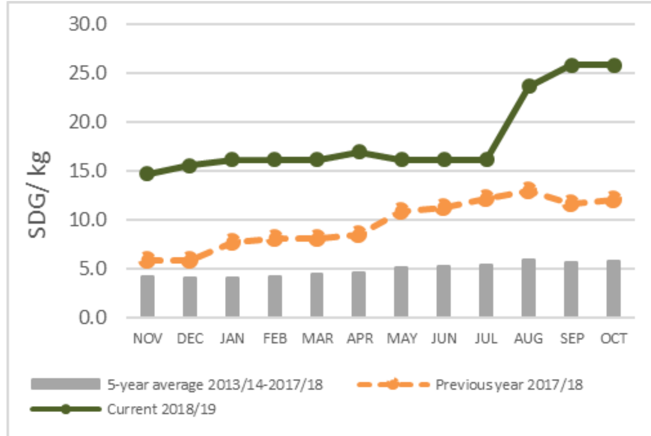
Following its significant increase during June and July, livestock prices either remained stable compared to last month, or increased 10-20 percent across most markets during end-September due to the relative decrease in demand for both export and local consumption following three months of high demand during Haj period. However, current livestock prices remained 100-150 percent above last year and 280-330 percent above the five-year average. The high price of livestock is related to the overall increase in prices resulting from the continued deterioration of macroeconomic factors, including the high cost of feeds and animal services and the high cost of transportation and road fees. Food prices are increasing at greater rates than livestock prices. As a result, the livestock-to-cereal terms of trade are lower than last year and the five-year average.

Figure 2. Retail prices of sorghum, Al Gadarif



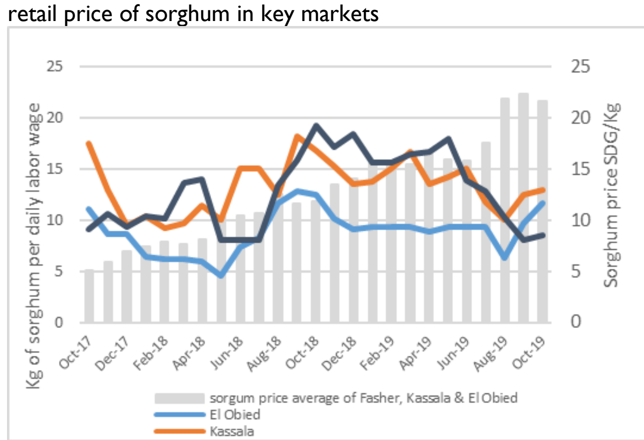
Source: *FAMIS/FMoA data*

Figure 3. Retail price of sorghum, El Obied



Source: *FAMIS/FMoA data*

Figure 4. Labor wages-to-sorghum terms of trade (ToT) versus retail price of sorghum in key markets



Source: *FAMIS/FMoA data*

The security situation has remained stable in the main conflict-affected areas of Sudan in 2019. No direct confrontation between conflicting groups has been reported in South Kordofan, Blue Nile, and the Darfur states since the beginning of the year and no major new displacements have occurred since beginning of 2019. According to UNHCR, approximately 15,551 refugees from South Sudan have arrived in 2019, including 477 in September.

In September 2019, WFP provided food assistance to approximately 2.1 million beneficiaries in Sudan, through various modalities (in-kind and cash) including general food distributions (GFD). Among those receiving GFD, it is estimated the average ration is between 50 and 100 percent of the required 2,100 kilocalories. Beneficiaries reached were primarily protracted and new arrivals (2 years) IDPs in Darfur, South Kordofan, and Blue Nile, as well as South Sudanese refugees and residents in drought and conflict-affected areas in Kassala, Red Sea, Al Gedarif, North Darfur, and North Kordofan, in addition to flood affected population. It is anticipated that this assistance is improving food security among beneficiaries.

Based on the results of the S3M assessment collected in November 2018, the overall national level of global acute malnutrition (GAM) by weight-for-height z-score (WHZ) is anticipated to be 'Serious' (GAM(WHZ) 10.0-14.9%), though there is likely wide variation in the severity. At the state level, 'Critical' (GAM(WHZ) ≥15%) levels are likely in areas where past surveys identified this level, including North Darfur, Northern, Red Sea, South Darfur, River Nile States, while 'Alert' (GAM(WHZ) 5.0-9.9%) or 'Serious' (GAM(WHZ) 10.0-14.9%) levels are likely in the remaining states. Although the critical level of acute malnutrition remains possible in some localities of states such as Central and East Darfur, West Kordofan, and Khartoum.

Overall, the food security situation started to improve seasonally during October 2019 relative to the peak lean season period of September 2019 due to the increased availability of own households' production of earlier maturing crops from the ongoing 2019/20 summer season, in-kind payments from agricultural labor and market purchase with relative stability and/or decline of staple food prices. However, the persistent poor macroeconomic conditions and continued above-average prices of essential food and non-food items during this year are driving worse food security outcomes than are typical during the start of the harvest period. Additionally, the high prices of non-food commodities and services including agricultural inputs, transportation and medicine have limited poor households' ability to maintain their typical livelihoods. Therefore, Stressed (IPC Phase 2) outcomes are prevalent in many areas while Crisis (IPC Phase 3) food insecurity outcomes exist in conflict-affected areas and areas hosting IDPs in Jebel Marra; SPLM-N areas of South Kordofan and southern Blue Nile; in addition to the northern parts of north Darfur, parts of North Kordofan, northern Kassala, and Red Sea states.

Assumptions

The October 2019 to May 2020 most likely scenario is based on the following national-level assumptions:

- Favorable crop yields are expected following above-average seasonal performance during the 2019 season, particularly in areas of rainfed agricultural sector. The overall 2019/20 harvestable area is expected to be average to slightly above average.

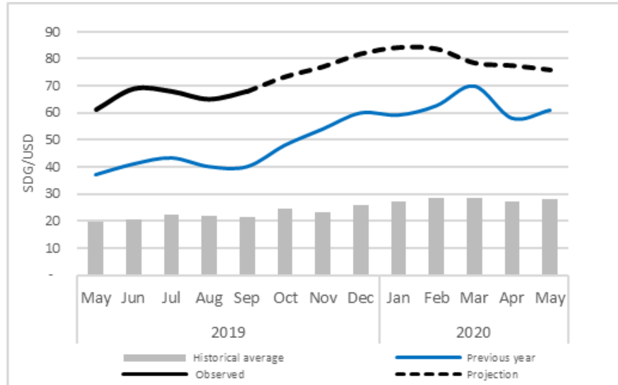
- Favorable seasonal performance are expected to generate above-normal levels of agricultural labor opportunities, particularly during the harvest period between November 2019 and February 2020. Labor wages are expected to be higher than last year. A labor shortage is expected in some parts of traditional sector because there is competition with traditional gold mining.

- Pasture and water availability are expected to be above average into late 2019 and early 2020, following good performance of the 2019 rainy season. This is likely to help sustain good livestock body conditions. Nevertheless, the reported wide expansion of cultivated areas into grazing lands, and the closure of some main animal seasonal migratory routes, will affect seasonal migration of livestock. Earlier than usual feed gaps are expected in parts of Sudan later in the scenario period.

- The transitional government in Sudan is expected to introduce new economic policies attempting to attract external investments and engage with the international community to curb the deteriorating macroeconomic situation. Nevertheless, the macroeconomic crisis is likely to persist in the form of local currency depreciation, high inflation and shortages of hard currency required to meet imports of essential items such as wheat flour, medicine, fuel, and agricultural inputs. Based on FEWS NET's integrated projections, it likely that the exchange rate of the Sudanese Pound (SDG) relative to the USD in the parallel market will remain at its current high levels of over 70 SDG/USD through the first half of 2020. The exchange rate likely to be slightly above its 2018/2019 levels and of 100-150 percent above average (Figure 5).

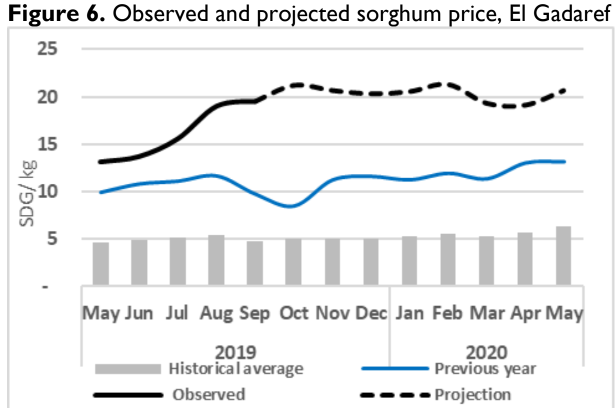
- Based on FEWS NET's price projections, staple food prices are anticipated to follow seasonal trends between October 2019 and May 2020. Sorghum and millet prices are anticipated to seasonally decrease by 5-10 percent through beginning of the post-harvest period in March. However, prices are likely to remain 10-15 percent above last year and around 200-250 percent above the five-year average (Figure 6). The price of locally produced wheat will follow a similar trend and likely to remain over 250-275 percent above the recent five-year average and 25-45 percent higher than last year. The price of locally produced wheat is similarly expected to remain over 300 percent above average and 75-100 percent higher than last year.

Figure 5. FEWS NET integrated projection of SDG/USD exchange rate on the parallel market



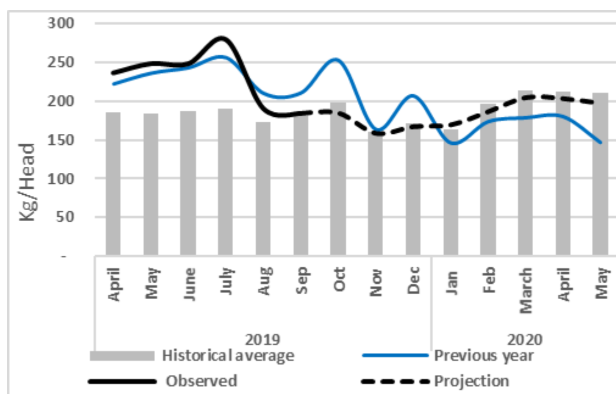
Source: *FAMIS/FMoA data*

Figure 6. Observed and projected sorghum price, El Gadaref



Source: *FEWS NET projection based on El Neelain data*

Figure 7. Observed and projected goat-to-sorghum terms of trade, El Obied



Source: *FEWS NET projection based on FAMIS data*

- Livestock prices are expected to remain at current high levels between October 2019 and May 2020 due to improved animal body condition with favorable pasture conditions, high costs of transportation, and seasonal decreases in animal supply to markets. Meanwhile, demand for formal exports to Gulf states as well as for informal cross-border trade with neighboring countries is expected to remain high.

- Based on projected sorghum and goat prices, goat-to-sorghum TOT is anticipated to increase slightly compared to last year due to the projected 5-10 percent reduction in sorghum prices, while goat price likely to continue to increase or remain relatively stable. TOT will remain slightly higher than last year but at near average levels. TOT will begin to deteriorate seasonally towards the beginning of lean season and remain above last year, but slightly below the five-year average as sorghum prices increase (Figure 7).

- Agricultural labor wages are expected to increase 10 to 20 percent between November to January 2020. Wage labor is likely to reach 25-35 percent above last year but 15-20 percent below the five-year average. TOT will deteriorate seasonally towards beginning of the lean season with the expected increase of sorghum prices and reduce access to agricultural labor by the end of harvest.

- The security situation is expected to remain relatively calm in conflict-affected areas of Darfur, South Kordofan, and Blue Nile. However, the potential for increased tension and periodic clashes remains. The number of displaced people in Sudan is expected to remain around 2.0-2.6 million throughout the projection period. The number of refugee arrivals from South Sudan is expected to remain limited during rainy season due to poor roads and will increase during the dry season. Overall, the number of South Sudanese refugees in Sudan is expected to be remain between 900,000 and 950,000.

- Based on WFP's Operation Plan for humanitarian food assistance from June 2019 to January 2020, it is expected 3.7 million beneficiaries will be reached with over 167,000 MT and 41.7 million USD. The majority of beneficiaries are in Darfur, and the ration is expected be greater than 50 percent of kilocalorie needs.

Most Likely Food Security Outcomes

October 2019 to January 2020 is the harvest season in Sudan, when access to food and income typically improve with improve food availability from own households' production, access to in-kind payments from agricultural labor and support from relatives. Likewise, income from agricultural labor and the sale of cash crops will support market purchases of food during a time in which staple food prices seasonally decrease. Although food access will improve, food security outcomes are expected to be worse than is typical during this time of the year. While many areas will improve to Minimal (IPC Phase 1) and Stressed (IPC Phase 2), high staple food prices and lower than normal income, particularly from labor, will drive higher than usual food assistance needs. Crisis (IPC Phase 3) food insecurity outcome is likely among IDPs in SPLM-N controlled areas of South Kordofan, IDPs and conflict-affected households in Jebel Marra in Darfur, and among populations in North Darfur, North Kordofan, Northern, Red Sea, South Darfur, River Nile States.

February to May 2020 marks the period following harvests and prior to the peak of the lean season. During this period, food security outcomes typically begin to deteriorate in April as the lean season approaches, as households' food stock diminish, in-kind payments from agricultural labor, cash crops, and livestock are at seasonal lows, and more households rely more heavily on market purchases for food during a time when staple food prices begin to increase seasonally. Persistent macroeconomic difficulties resulting in above average prices of food and non-food items will continue to drive higher assistance needs than in a typical year. Poor and conflict-affected households in conflict-affected areas, including areas affected by flooding this year, will face food consumption gap during this period. As a result, many in North Darfur, parts of White Nile, southern Blue Nile, parts of North Kordofan and, northern Kassala, and much of northern Red Sea will remain Stressed (IPC Phase 2) between February and May 2020. IDPs and conflict-affected people in parts of SPLM-N areas of South Kordofan and Blue Nile, IDPs in parts of Jebel Marra without humanitarian assistances and poor groups in parts of North Darfur, northern Kassala, and much of northern Red Sea states will be in Crisis (IPC Phase 3).

Events that Might Change the Outlook

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

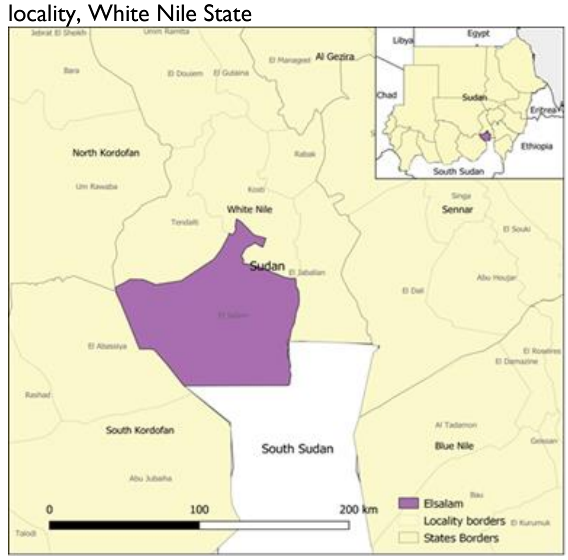
Area	Event	Impact on food security outcomes
National	Significant deterioration in the macroeconomic situation and extreme spikes in prices for staple foods.	Extreme price spikes would further reduce food access and the number of households facing Crisis (IPC Phase 3) or worse outcomes would be expected in the near term.

AREAS OF CONCERN

El Salam locality of the White Nile state (Figure 8)

El Salam locality in southwestern White Nile state borders South Sudan in the Southeast Rainfed Semi-Mechanized Agriculture Livelihood Zone of Sudan. In these areas, the main crop grown is sorghum and millet is a secondary crop. Sesame is the main cash crop, followed by cotton and sunflower seed grown by wealthier farmers. Poor and very poor households, however, who account for about 60 percent of the population, cultivate small plots of four to six hectares with more focus on staple food crops. Agricultural labor is a major source of income for poor groups in the zone.

Figure 8. Area of concern reference map, El Salam locality, White Nile State



Source: *FEWS NET*

Current Situation

El Salam locality hosts more than 128,500 South Sudanese refugees. In addition, the locality hosts approximately Sudanese 47,000 returnees from South Sudan who have arrived in the area since 2011. Approximately 844 South Sudanese refugees have arrived in El Salam locality in 2019, including approximately 58 in September 2019.

In September 2019, OCHA and HAC have identified El Salam locality as the locality most affected by heavy rains and flash floods in Sudan this season. According to OCHA and partners, more than 40,000 people (about 9,000 households) in El Salam locality have been directly affected by heavy rains and flash floods. Reports indicate that approximately 3,000 homes have been destroyed and 4,000 damaged, alongside losses of livestock.

Field reports from the recent mid-season assessment indicated that heavy rains and flash floods have caused considerable destruction to cropped areas. Preliminary estimates indicate that more than 546,000 feddan (229,433 hectares) out of 1,300,000 feddan of cropped area in El Salam locality has been destroyed by flash flood and waterlogging, which represents around 40 percent of total area cultivated in El Salam locality this season. Crop development in El Salam locality is behind the typical calendar due to dry spells in June and July and flooding in August, which have resulted multiple rounds of replanting. Sesame, sorghum, and vegetables are the worst affected crops. Sesame crops in areas worst affected by flooding and waterlogging are unlikely to be replanted, as there is not enough time remaining in the season for replanted crops to reach maturity.

Staple food prices continued to increase seasonally in White Nile during the peak of the lean season in September 2019. In Kosti market, sorghum prices increased 23 percent between July and August and 4 percent between August and September 2019 as supply of cereals declined seasonally and due to high transportation costs and increased seasonal demand on markets. Sorghum prices in September 2019 were approximately 85 percent higher than in September 2018 and 265 percent above the recent five-year average. In rural areas of El Salam, prices of non-cereal food items were reported to be 20-30 percent higher than of the main market of Kosti due to the reduced supplies with cut-off main roads to the area and high cost of transportation. In a normal year, the difference in prices between Kosti and El Salam are rarely greater than 10 percent.

Livestock prices continued to increase since the beginning of 2019 due to the overall macroeconomic difficulties in addition to the relatively high demand for local consumption and export. Sheep prices in Rabak market increased by 10 percent between June and July and by 7 percent between August and September 2019. September 2019 prices were almost double those observed in September 2018 and 225 percent higher than the recent five-year average.

Sheep-to-sorghum terms-of-trade remained stable between August and September, after dropped 12 percent between July and August 2019. September 2019 levels of TOT in Rabak market were 12 percent those observed in September 2018, but above respective last year but 20 percent lower than the recent three-year average. Labor wage to sorghum TOT is also followed the same increasing trend but at relatively lower level of exchange between wages and sorghum due to high increase in sorghum price compared to increase in wages.

Assumptions

In addition to the above national-level assumptions, the projected outcomes for El Salam locality (White Nile state) are based on the following assumptions:

- Harvests will be well below-average due to extensive flooding and below-average yields of late-planted crops.
- Staple food prices are anticipated to remain well above average throughout the scenario period, despite declines during the harvest season between November and February. Prices will likely seasonal increases starting in March and 50-80 percent above prior year levels and over 200 percent above the five-year average through May 2020.
- Poor households in El Salam locality will be highly depend on more agricultural labor as main source of income during the first half of the scenario period (harvest season) and competition over available labor opportunities is expected to be above-average due to high need of people for cash for rehabilitation of damaged houses and restoration of assets.
- Given increased susceptibility to waterborne disease caused by recent flooding situation, above average expenditure on health and livestock vaccination and treatment during the first half of the scenario period is expected. Heavy rains and flash floods have resulted on destruction of most of the main open water sources and poor germination of pasture particularly in main grazing areas. This is will result on increase water shortage and significant animal feed gap during the second half of the scenario period.

Most likely food security outcomes

Access to food by poor groups in El Salam locality is likely to improve seasonally during harvest period of the outlook period (November 2019 to February 2020) relative to lean season period of September 2019 due to the expected improve in availability and access to food from own production, in-kind payments from agricultural labor and market purchase. This year, poor households' access to food during this period is likely to remain below normal levels of the harvest period due to the expected below average yield this season, limited household's purchasing power and anticipated high cereal prices while Poor while household's access to food diversity will remain limited due to high prices of non-cereal food items and reduced poor household's purchasing power to afford food diversity and meet other essential services requirements. Accordingly, poor households are likely to remain with moderate food consumption gap and livelihoods deficit through the first half of the scenario period and face Crisis (IPC Phase 3) food security outcomes during this time.

Situation is expected to begging gradual deterioration during post-harvest period in March through beginning of the lean season in May 2020. During this period, food availability will reduce as food stock at households' level will diminish, in-kind payments from agricultural labor will be at its minimum and food prices will pursue seasonal increases. High food and non-food items will continue to limit poor group's purchasing power and households likely to go for severe coping strategies to mitigate shortage of food at household level. Nevertheless, poor groups in the area will not be able to meet at least their minimum food consumption requirements and will continue to face significant food consumption deficit during second half of the scenario period. therefore, the area will continue to face Crisis (IPC Phase 3) food security outcomes with higher number of people facing Phase 3 and worse food security outcomes during this period.

Events that Might Change the Outlook

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

Area	Event	Impact on food security outcomes
El Salam locality of White Nile State	Displacement from South Sudan	Increased arrival of South Sudanese refugees into the area will result in substantial increase in needs of the people and will put more pressure on the already limited services in the area. The food prices will increase as needs will increase considering the expected shortfall of cereals during the outlook period.

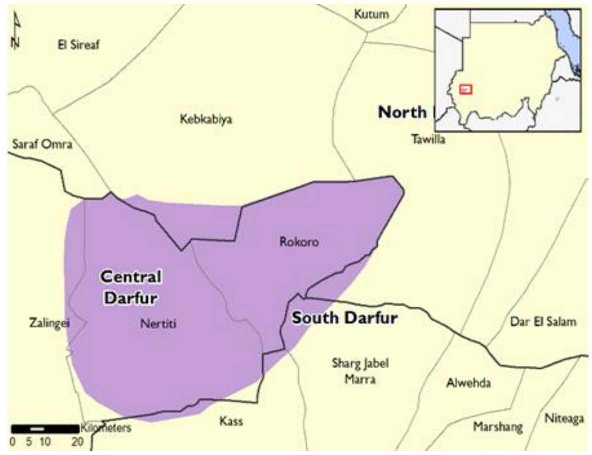
Inaccessible areas of Jabal Mara areas-SLA-AW (Figure 9)

Current situation

Jebel Marra near the borders of Central, North, and South Darfur has been the site of active conflict between Sudanese Armed Forces (SAF) and the Sudan Liberation Army led by Abdul Wahid Nour (SLA-AW) since early 2003. Particularly in early 2016, conflict drove significant increases in displacement.

In January 2017 a ceasefire was declared, which has resulted in improvements in overall security, with very limited direct conflict between the parties. In early September 2019, the new transitional authority in Sudan and the main armed movements have signed a declaration of principles with the intention of concluding a longer-term peace agreement. However, the SLA-AW faction was not part of this agreement as they are still not convinced it is comprehensive enough to address the roots of the crisis in the conflict-affected areas. In October 2019, the security situation remains generally calm.

Figure 9. Area of concern reference map, Jebel Marra, Darfur State



Source: *FEWS NET*

However, population movements to and from the area have been limited and trade flows to the area are restricted. Moreover, humanitarian agencies lack access to populations, including IDPs residing with host households and in camps.

Field reports from the recent mid-season assessment in September suggest that many households in Jebel Marra continue to lack access to their cultivable land and face shortages and high costs for agricultural inputs. Furthermore, displacement of many youth from the area has resulted in shortages of labor. Reports indicate that area planted this year is similar to last year, but significantly less than prior to the increases in conflict in 2016. Satellite-derived rainfall estimates indicate performance of the rainy season has been mixed in the Jebel Marra, with periods of above-average rainfall between July and August, but below-average rainfall in September. This is consistent with field reports indicating severe dry spells lasting nearly three weeks in September have affected crops during the critical period of development.

Jebel Marra typically relies heavily on other parts of Sudan, particularly central Sudan, for supplies of non-cereal food items (such as sugar, cooking oil, beans, and salt) and essential non-food items. In most areas of Jebel Marra, prices of these items have nearly tripled since the onset of the current macroeconomic crisis in December 2018. These increases are largely due to sharp increases in the cost of transportation and a continued lack of access to major markets of supply.

In Zalingei market of Central Darfur state, the nearest major market that supplies Jebel Marra, staple food prices have continued to since the beginning of the lean season in May. Sorghum prices increased by 9 percent between June and July and by another 22 percent between August and September 2019, before declining by 17 percent in October. Sorghum price are currently approximately 17 percent higher than at the same time in 2018 and 231 percent above the recent five-year average.

IDPs and poor households in Jebel Marra are facing very low levels of income as insecurity continues to limit their access to agricultural lands and associated labor opportunities. In addition, restricted market access and high transportation costs are limiting their ability to earn income from the sale of forest products, horticulture products, cash crops, and working in petty trade. These limitations on income earning opportunities, alongside high staple food prices, are resulting in very low purchasing power among poor households and IDPs in Jebel Marra.

Livestock-to-cereal terms-of-trade in Zalingei have declined late in the lean season in September, before improving in October as harvests begin to get underway. This is largely due to stable goat prices over the past several months but increases in sorghum prices in September that were followed by decreases in October. Goat-to-sorghum terms-of-trade decreased by 18 percent between August and September, and then increased by 18 percent in October 2019. Terms-of-trade in October are approximately 215 percent higher than in October 2018 and 68 percent above the recent five-year-average.

Labor-to-sorghum terms-of-trade improved by 20 percent during October due to 17 percent drop in sorghum price while labor wage remained unchanged. October level of labor to sorghum term of trade was over 200 percent above same period last year and 127 percent above the recent five-year average. Improvement in goat to sorghum TOT would be of less benefit to poor groups and IDPs due to their limited livestock holdings.

Assumptions

In addition to the national-level assumptions above, projected outcomes for IDPs and poor households in SPLA-AW-controlled areas of Jebel Marra are based on the following assumptions:

- In the absence of a long-term peace agreement, active conflict is expected to remain limited, insecurity will continue to limit population movement, trade, and movement of humanitarian actors between government-controlled and SLA-AW areas of Jebel Marra.
- Households will access own-produced crops, but only those from nearby farms and Jubraka (home gardens) due to a lack of access to agricultural lands further away from the homestead. Likewise, access to associated agricultural labor opportunities in more productive areas of Central and South Darfur states will remain limited.
- Market supplies of locally produced staples (sorghum and millet) are expected to improve during the harvest period between October 2019 and February 2020. This will lead to declines in cereal prices, before market supply begins to start decreasing in March 2020. After March, cereal prices will begin to increase again and remain well above average. Livestock prices are expected to remain relatively stable throughout the scenario period.

Most likely food security outcomes

The first half of the scenario period (November to January) is the typical harvest period, during which time access to food in Jebel Marra improves as households' access to own production, in-kind payments, and wild food. As a result, food consumption will improve among most IDPs and poor households, who will no longer be facing extreme food consumption gaps associated with Emergency (IPC Phase 4). However, these households will still be unable to meet their minimally adequate food needs and will face moderate food consumption due to households' limited ability to produce crops and very low purchasing power. As a result, poor households and IDPs will be in Crisis (IPC Phase 3) between October 2019 and February 2020.

The second half of the scenario period (February to May) represents the period after harvests and the beginning of the onset of the lean season in May/June. Toward the end of this period, household access to food begins to deteriorate as households deplete their food stocks, food from in-kind payments reaches seasonal lows and staple food prices begin to increase seasonally. Given the limited own production and weak purchasing power, food consumption among poor households and IDPs in SLA-AW areas of Jebel Marra will begin to deteriorate as the lean season approaches. Limitation in purchasing power to acquire food and non-food items will increase gradually through the period. consequently, although these areas will remain in Crisis (IPC Phase 3) for most of the scenario period, the number of households in Emergency (IPC Phase 4) will begin to increase May 2020 in the absence of humanitarian assistance.

Events that Might Change the Outlook

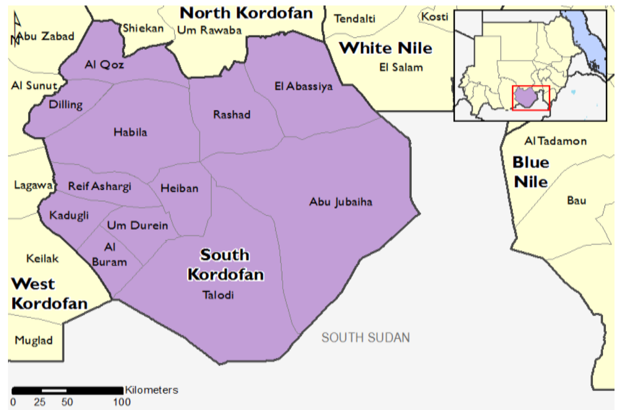
Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
SLA-AW areas in Jebel Mara	Conflicting parties reach a durable peace agreement	A peace agreement could improve the access to the area, including for humanitarian actors. Improvements in security could facilitate market access and the return of IDPs. This would likely result in improved access to key sources of food and income among poor households. In the near to medium term, food security outcomes at the area level could improve to Stressed (IPC Phase 2), and the number of people facing Crisis (IPC Phase 3) or worse would decline significantly.
	Increase in conflict	Increases in conflict could result in further displacement, limitations on market access, agricultural land, and labor opportunities, and losses of livelihoods assets. This could result in a further deterioration in household food security with increases in populations in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) throughout the scenario period.

Sudan People Liberation Movement – North controlled areas of South Kordofan (Figure 10)

This area of concern includes areas of South Kordofan under the control of the Sudan People Liberation Movement - North (SPLM-N). Between 2011 and 2017, these areas faced significant conflict between Sudanese Armed Forces (SAF) and SPLM-N. This conflict drove large-scale population and significantly limited households' access to key sources of food and income, including agricultural land and access to labor opportunities. Since January 2018, direct conflict has largely subsided, although armed groups remain in opposition and movement between SAF and SPLM-N-controlled areas remains restricted.

Figure 10. Area of concern reference map, SPLM -SK



Source: *FEWS NET*

Current Situation

Sudan's new transitional authority and the Sudan People's Liberation Movement-North (SPLM-N) have signed a declaration opening the door for further political talks while also renewing the ongoing cease-fire for three months. The government also agreed to let aid into conflict-affected areas including Darfur, the Nuba Mountains of South Kordofan and Blue Nile states. However, access by humanitarian actors to SPLM-N controlled areas, population movement, access to livelihood activities and trade flows into the area remained limited as of October 2019.

Based on field reports from the recent mid-season assessment of the 2019/20 agricultural season, rainfall in SPLM-N-controlled areas of South Kordofan has been above average for the season overall. Long dry spells lasting approximately of 3 weeks were reported during July, and heavy rains in August and September led to flooding and waterlogging that damaged crops, particularly in Al Abasiya and Rashad localities in the eastern parts of the state. Field reports indicate households and IDPs in South Kordofan have had better access to cultivable areas this year, largely due to improved security. As a result, the number of households engaged in cultivation this year is reportedly higher this year than in previous years, but most cultivation is still limited to *jubraka* (home garden) and cultivable land in nearby areas.

Retail sorghum prices in Kadugli, the nearest major market in Government controlled areas of South Kordofan, remained unchanged during October following a 15 percent increase between August and September 2019. Sorghum prices are approximately 20 percent higher than in October 2018 and190 percent above the five-year average. In most SPLM-N-controlled areas, September 2019 cereal prices remained were slightly below September 2018 prices, but even at these levels they are more than 60 percent above the prices found in nearby government areas. Declines in prices compared to last year are reportedly due to earlier-than-normal harvests of crops, leading to earlier seasonal declines in prices. Prices for non-cereal food items, such as sugar and beans, are almost double those found in nearby government areas.

In Kadugli market, livestock prices have continued to increase slightly in recent months. Goat and sheep prices increased by approximately 8 and 13 percent during June and July, and then by approximately 5 percent in October. Prices for small ruminants are approximately 86 percent higher than in October 2018 and 285 percent above the recent five-year average. However, In SPLM-N areas livestock prices remained significantly below its respective in government, this was mainly due to limited access to marketing opportunities outside the area. Generally, IDPs in SPLM-N areas have limited livestock holding and are less benefiting from improve in livestock prices.

Livestock-to-cereal terms-of-trade remain above average in SPLM-N-controlled areas of South Kordofan, although households in these areas have lower livestock holdings than nearby government-controlled areas. Goat-to-sorghum terms-of trade declined 14 percent between August and September 2019, following significant increases during the Eid holidays in mid-2019. Overall, goat-to-sorghum terms-of-trade are more than double their October 2018 levels and approximately 50 percent higher than the recent three-year average. Still, higher sorghum prices and lower livestock prices in SPLM-N versus government-controlled areas is resulting in comparatively lower terms-of-trade for households in SPLM-N-controlled areas.

Assumptions

In addition to the national-level assumptions above, projected outcomes for SPLM-N-controlled areas of South Kordofan are based on the following assumptions:

- Availability and access to household's own food is likely to be improved during the first half of the scenario period with the beginning of the harvest, situation will seasonally deteriorate during the second half of the scenario period, which, coincides with the starting of the lean season when Depletion of household's food stock and reduced availability of wild food is expected.
- Trade flows, population movement, and humanitarian assistance flows between SPLM-N and government-controlled areas are likely to remain limited at least throughout the first half of the scenario period. relative improvement during second half of the with relative improve in off road movements during dry season of the scenario period..
- Stable food prices are likely to decline seasonally between October 2019 and March 2020 as harvests reach markets and will increase seasonally between April to May. Cereal prices are expected to be more than 75 percent higher than in late 2018/early 2019 and more than double of the five-year average.
- Access to seasonal agricultural labor opportunities, petty trade, and collection of wild foods and forest products is likely to improve for resident and IDP households as harvests get underway in October/November 2019. Access to agricultural labor opportunities will reduce and reach seasonal lows between March and May 2020.

Most likely food security outcomes

Food access for IDPs in this area is likely to improve between November 2019 and February 2020 as household access to food and income improves with harvests of self-produced crops, in-kind payment from agriculture labor, increased availability of wild foods, remittances, and income from labor supports market purchases of food. Though, poor households in the area are likely to continue to face limited access to market purchase due to high prices, limited household's income. The cash shortage continues to be a major challenge for trading in the area, bartering locally produced items with supplied items from outside the area became main methods of trading in SPLM-N markets. Most IDPs are likely to continue facing moderate food consumption gaps between November 2019 and February 2020 and face Crisis (IPC Phase 3) food security outcomes between in absence of humanitarian assistance.

Food access is likely to begin deteriorating as the lean season approaches in April/May 2020. During this time, households' access to own-produced foods will be very limited, access to in-kind payments from agricultural labor will be at seasonal lows, and most households in this area will rely primarily on wild foods and market purchases in order to access food. As IDPs in general face extremely low levels of income, food consumption gaps among IDPs will grow further. Although these areas will remain in Crisis (IPC Phase 3) for most of the scenario period, the number of households in Emergency (IPC Phase 4) will begin to increase May 2020 in the absence of humanitarian assistance.

Events that Might Change the Outlook

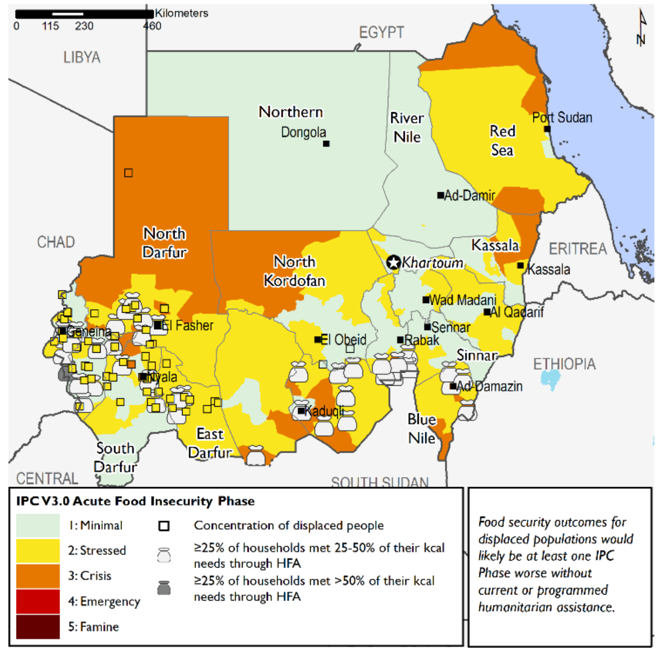
Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
SPLM-N controlled areas	Progress in peace talks	Peace talks between GoS and SPLM-N rebel groups that result in humanitarian access, free trade flows, and population movement will result in improved food access and consumption. In the short-term, households could experience an improvement of at least one IPC Phase classification.
	Outbreak of additional conflict	Increases in conflict would lead to new displacement, further restrictions and disruptions to trade flows and population movements. Increased numbers of households could deteriorate to Emergency (IPC Phase 4).

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

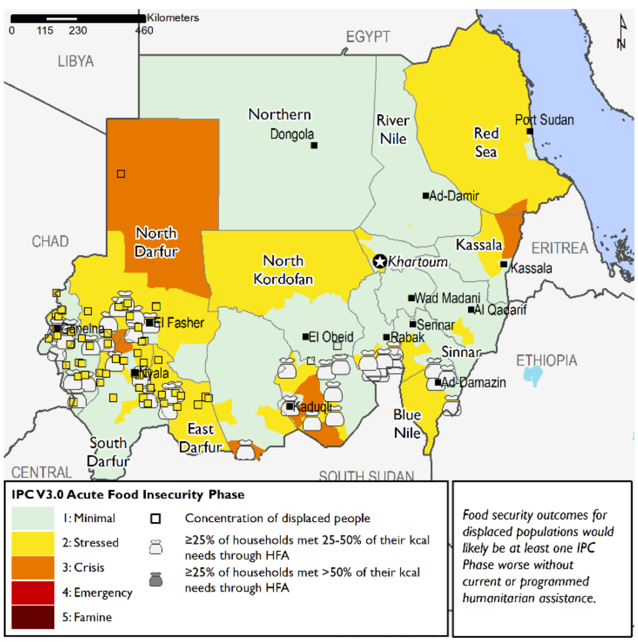
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. The symbol indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian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

Current situation, October 2019



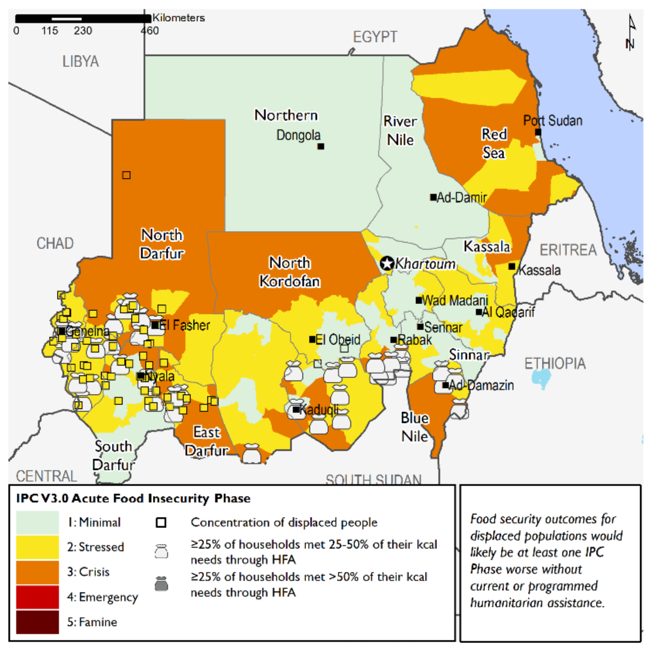
Source: *FEWS NET*

Projected food security outcomes, November 2019 to January 2020



Source: *FEWS NET*

Projected food security outcomes, February to May 2020



Source: *FEWS NET*

FEWS NET 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.