![FEWS NET — Famine Early Warning Systems Network]

SUDAN Food Security Outlook Update

August 2022

High food prices, flooding, and inter-communal clashes continue driving high needs

KEY MESSAGES

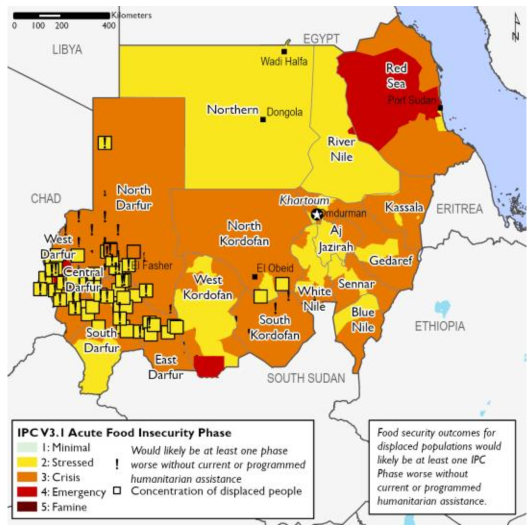
- Sudan will continue facing high humanitarian food assistance needs through September 2022, the peak of the lean season. High food prices and reduced access to cash income continue to limit poor household purchasing power and food access. Increased intercommunal clashes and flooding also continue to limit households' access to their main livelihood activities. The number of households facing Crisis (IPC Phase 3) or worse outcomes is expected to remain high among IDPs, people recently affected by intercommunal clashes, flood-affected households, poor households in eastern and western Sudan, and urban poor households.

- As of August 20, average to above average rainfall was recorded across most of central, western, and eastern Sudan. The rainfall deficits recorded in June and July in the northern and southern parts of Sudan declined following improved rainfall in August. As of August 28, the flooding level threshold is above the Flood level at the Ed Deim, Khartoum, and Atbara stations, according to OCHA's Sudan Flood Dashboard, with water levels above the Critical level at Shandi station. Heavy rainfall and flash floods have affected over 226,000 people in 15 states, damaging and destroying homes, health care center, cropped land, and livelihood assets.

- In August, the Ministry of Agriculture and Forestry reported late planting and below-normal cultivation in most traditional and semi-mechanized rain-fed and irrigated sectors due to delayed rainfall in June and July and the high cost and shortages of agricultural inputs. However, heavy rainfall and flooding in late July and August continue to impact pasture and crop development in many areas in Al Jazira, River Nile, Sennar, Kassala, and South Darfur states. The compounding impact of late planting, high input prices, and flooding will likely compromise the upcoming harvest.

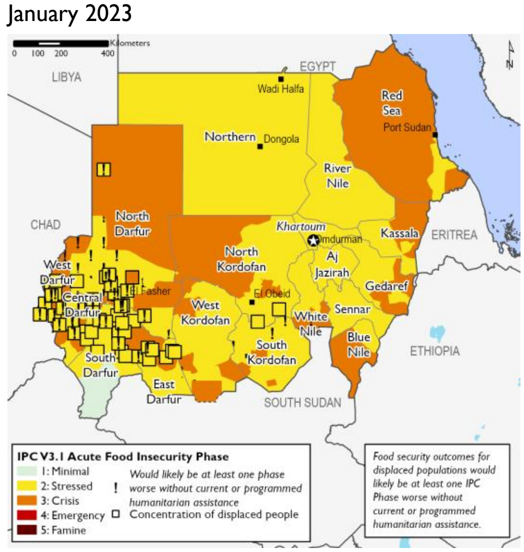
- Between July and August, staple food prices increased seasonally by 10-15 percent, remaining approximately 170-235 percent higher than August 2021 and about seven times higher than the five-year average across most monitored markets. The increase is driven by seasonally reduced market supply, increased demand, high transportation and production costs, and the continued devaluation of the SDG. Locally produced wheat prices remain relatively stable but at high prices.

Projected food security outcomes, August to September 2022



Source: FEWS NET

Projected food security outcomes, October 2022 to January 2023



Source: *FEWS NET*

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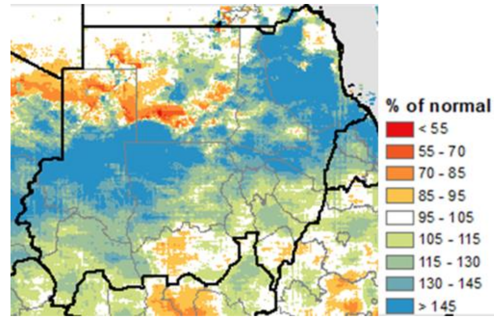
CURRENT SITUATION

Seasonal performance

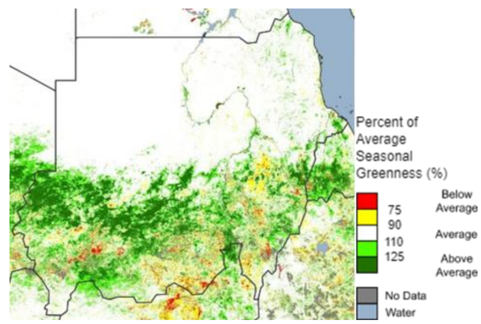
In August, above-average rainfall reduced cumulative rainfall deficits, resulting in flooding across the country. According to CHIRPS satellite data, as of August 20, cumulative rainfall is at least greater than 105 to over 145 percent of the 40-year average across most of central, western, and eastern Sudan, with 85 to 105 percent of cumulative rainfall in South Kordofan (Figure 1). In northern North Darfur and parts of the Northern state, cumulatively below-average rainfall averages persist following below-average rainfall in June and July 2022. However, heavy rainfall across Sudan and the northwestern parts of Ethiopia in late July and early August is resulting in rising Nile water levels and flash floods. As of August 28, 2022, the flooding level threshold at Ed Deim, Khartoum, and Atbara are above the flooding threshold, with Shandi station recording water levels above the Critical level, indicating that flooding is likely in the short term. According to the government's Humanitarian Aid Commission (HAC) and OCHA, as of August 28, over 226,000 people have been affected by the heavy rains and flash floods, with over 47,400 houses and 3000 health units destroyed or damaged, along with contaminating water sources in 15 states. Preliminary reports indicate that over 740 heads of livestock are estimated to have been lost, along with the flooding or waterlogging of over 140,000 feddans (~60,000 hectares) of cropped land. The states with the most affected number of people include Gedaref, Central Darfur, South Darfur, White Nile, Kassala, River Nile, and West Darfur states.

Figure1. Seasonal rainfall accumulation percent of the 1981-2010 average, June 01 through August 20, 2022



Source: *FEWS NET*

Figure 2. TERRA MODIS NDVI 64-day, percent of the 2001-2021 average, June 26-August 28, 2022



Source: *NASA/USGS GIMMS*

The above-average rainfall has improved vegetation conditions across much of Sudan. According to the satellite-derived normalized difference vegetation index (NDVI), vegetation greenness is average to above average across most of Sudan, with localized areas in southern Sudan recording below-average vegetation greenness following below-average rainfall in June and July, which delayed the start of planting (Figure 2). Heavy rainfall and flooding in late July and early August likely continue to impact vegetation and crop development in some of the central and eastern parts of the country with below-average vegetation greenness.

The agricultural season remains constrained by the impact of high prices and shortages of agricultural inputs, and delays to the start of the season. As of mid-August, there are no available government estimates on the area planted. However, late planting was reported by the Ministry of Agriculture and Forests (MFA) in most of the traditional and semi-mechanized rain-fed sectors due to delayed and below-average rainfall in June and July, along with intercommunal clashes. In the irrigated sector, the high prices and shortages of agricultural inputs and fuel, along with limited access to loans and financial support from the Agricultural Bank of Sudan (ABS) to purchase inputs and hire labor, are impacting farmers and likely resulting in below-average cropped land. According to key informants in Al Gadaref, one of the most productive areas of Sudan, agricultural inputs are approximately 300-500 percent higher compared to last year, with the price of sorghum, millet, and sesame seeds increasing from 300- 500 SDG/kg in 2021 to 800- 2400 SDG/kg in 2022. According to the MFA, as of mid-August, around 35-40 percent of the targeted area for planting in Al Gadaref has been planted, over 40 percent lower than the area planted in August 2021. In the irrigated sectors, an estimated 30-35 percent of the targeted areas for planting are planted. Overall, the compounding effect of late planting, high prices of agricultural inputs, and flooding are likely to affect crop productivity and result in a well-below average national harvest. A joint mid-season assessment is planned for the first week of September to assess the agricultural season's performance and crop development. Findings will likely be reported in the October Food Security Outlook.

Desert locust

In August, desert locusts do not threaten crop production in Sudan. According to FAO's August 2022 Desert Locust Bulletin, low-density immature and mature adult groups mixed with scattered adults, as well as 4th to 6th instar hopper groups and fledglings, were found at one location near Derbi in the River Nile State. Additional scattered mature solitarious adults were seen at other sites near Abu-Hamed and east of Shendi in River Nile state. Additional isolated and scattered mature solitarious adults were seen near Kassala. Low numbers of mature solitarious adults were also reported at a few sites in North Kordofan, White Nile, and west and east Khartoum states.

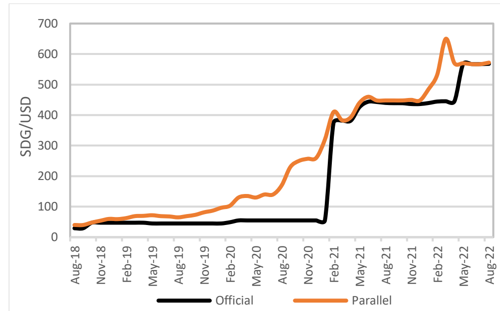
Macroeconomic Situation

The economic situation has continued to deteriorate in Sudan due to ongoing low foreign currency reserves, the depreciation of the SDG, high inflation rates, longstanding insecurity, and political instability. These compounding drivers are resulting in increasing food and transportation costs, high prices, and shortages of medicine, energy, and imported food and non-food items. In mid-August 2022, commercial banks and the parallel market are trading at around 569-572 SDG/USD compared to 443-448 SDG/USD in August 2021 (Figure 3). In early August 2022, the government of Sudan raised the official price of the customs dollar (the exchange rate for foreign currencies in the customs system) from 445 SDG to 564 SDG, resulting in a 30 percent increase in customs duties and around a 15 percent increase in fuel prices. Sudan's fuel prices are now retailing on average at around 935 SDG/liter (~6.20 USD/gallon), over 135 percent above respective prices last year and over five times higher than in October 2020 (Figure 4). This has led to a 15-20 percent increase in the cost of transportation, reducing the supply of commodities to markets, and a 10-15 percent increase in the price of most imported food and non-food items. Overall, the increasing fuel and food prices constrain household purchasing power across Sudan, as seen in the rising consumer price index (Figure 5). Although the annual percent change of the CPI has declined from a peak of over 400 percent in July 2021, triple-digit percent differences are still being recorded, indicating that food and non-food prices are continuing to rise rapidly. In July 2022, the consumer price index is around 125 percent higher than in July 2021.

Staple food prices and terms-of-trade

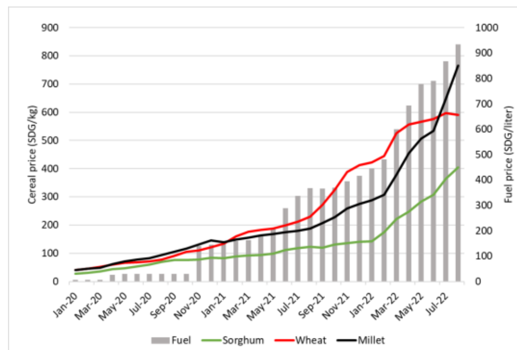
Staple food prices continue to increase seasonally due to increased market demand and high transportation costs. In August, the average retail price for sorghum and millet is 405 SDG/kg and 730 SDG/kg, with prices increasing by 10-15 percent between July and August 2022 across most markets (Figure 4). The rise in prices is mainly attributed to seasonally reduced market supplies and increased demand exacerbated by high transportation costs. Traders are also limiting supply to maintain their stocks due to the high transportation cost and anticipation of the below-average harvest. Sorghum and millet prices are retailing on average at around 405 and 765 SDG/kg in August 2022, approximately 170-235 percent higher than in August 2021 and about seven times higher than the five-year average. However, locally produced wheat prices in August are relatively stable compared to July due to the availability of stocks from the April 2022 harvest and imported wheat and wheat flour; however, prices are still high across most markets in Sudan. In August 2022, locally produced wheat sold for 602 SDG/kg, around 165 percent over respective prices in 2021 and almost 670 percent above the five-year average. The high locally produced wheat prices are mainly attributed to the continued higher than normal prices for imported wheat, wheat flour, and other cereal and non-cereal food items. Cereal prices are anticipated to continue to increase, at least through the beginning of the harvest in November 2022.

Figure 3. Sudanese Pound (SDG) to U.S. Dollar (USD) exchange rate, official and parallel market, August 2018 – August 2022



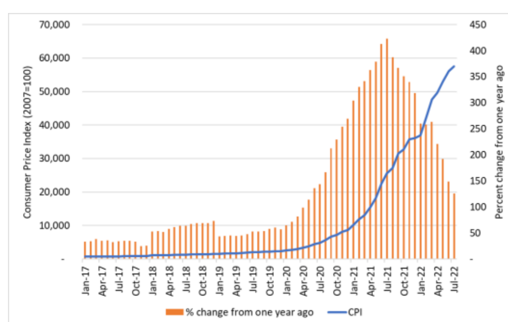
Source: *FEWS NET/FAMIS*

Figure 4. The national average price of sorghum, wheat, millet, and fuel, January 2020 to August 2022



Source: *FEWS NET/FAMIS*

Figure 5. Consumer Price Index (2007=100) and the percent change from one year ago, January 2017-July 2022

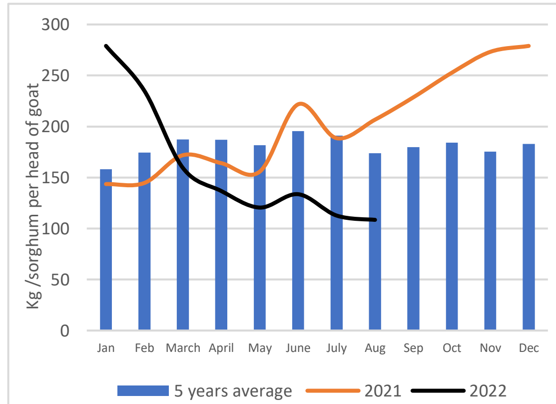


Source: *Central Bureau of Statistics, Sudan*

Livestock prices are declining following lower demand after the *Eid Al Adha* festivals in July and increased market supply as pastoralists sell livestock for income to purchase food. Following a 15-20 percent increase in goat and sheep prices in July due to high demand for local consumption and exports during the *Eid Al Adha* festivals, goat and sheep prices declined by 10-15 percent in August across most main markets in Sudan. Nevertheless, goat and sheep prices in August 2022 are almost 85-100 percent above their respective prices last year and about 400-500 percent above the five-year average. The above-average livestock prices are primarily driven by the high cost of animal husbandry and transportation costs, in addition to the devaluation of the SDG.

Since January 2022, the livestock-to-cereal terms-of-trade (TOT), a proxy for pastoral household purchasing power, is continuing to deteriorate, driven primarily by rising sorghum and millet prices. In August 2022, the goat-to-sorghum TOT in El Obied's main market in North Kordofan state is 108 kg of sorghum per head of a goat, a nearly 20 percent drop compared to June (Figure 6). The decline in the TOT is mainly driven by a 30 percent increase in sorghum, while goat prices remained relatively stable. The August goat-to-sorghum TOT in El Obied is approximately 50 percent lower than respective prices last year and nearly 40 percent lower than the five-year average. In the Al Gadaref market of eastern Sudan, the wage-labor-to-sorghum TOT in August remained at 8 kg of sorghum per daily wage, around a 25 percent drop compared to June due to a nearly 50 percent increase in sorghum prices while daily labor wages increased just over 10 percent between June and August 2022. For a household of six, 8 kg of sorghum can provide around two days of kilocalorie needs if the household just eats sorghum. However, given the high prices of all other food and non-food needs, households are likely to purchase less than 8 kg of sorghum. In the Al Gadaref market, the wage-labor-to-sorghum TOT remains 70 percent below last year and nearly 60 percent lower than the five-year average. The drop in the wage-labor-to-sorghum TOT compared to last year is mainly driven by the significant increases in sorghum prices. At the same time, labor wages remain relatively stable due to lower labor demand due to the delayed start of planting and increased availability of laborers from Ethiopia. The decline in household TOT and the above-average prices of food and non-food items will likely continue constraining household purchasing power until the start of the harvest in November 2022.

Figure 6. Goat-to-sorghum terms-of-trade (kg/head), El Obied market, 2022 compared to 2021, and the five-year average



Source: *FEWS NET/FAMIS*

Conflict and displacement

Between July and mid-August 2022, around 14 violent intercommunal clashes were monitored by DTM in eight states across different parts of Sudan. Intercommunal clashes continued across the Darfur and Kordofan regions, Blue Nile state, and Kassala state. The most recent violent clashes occurred in Kutum (Molagat Village), North Darfur state, displacing 2,500 people. However, the most severe conflict occurred in Blue Nile state, where an estimated 37,760 people (~6,185 households) were displaced to different areas in Blue Nile, Sennar, White Nile, Al Jazira, and Khartoum states. The DTM field teams indicate that at least 180 people were killed, and around 6,490 reported cases of the loss of goods and livestock.

Between the end of April and mid-August 2022, intercommunal clashes across Sudan displaced over 61,560 people. Most of the recent conflicts are driven by disputes over land, competition for scarce natural resources, political instability, civil unrest, and the increased presence of multiple armed groups from the Juba Peace Agreement (JPA) in Darfur, Kordofan, and Blue Nile states. Across Sudan, the rise in clashes is resulting in fatalities, the burning of villages, and the loss of livelihood assets such as farm equipment, seeds, food stocks, and livestock.

Humanitarian Assistance

In July 2022, WFP and implementing partners provided approximately 1.36 million beneficiaries with 50 percent rations of in-kind food assistance (~11,565 metric tons) and around 531,000 USD in cash transfers. Most beneficiaries included IDPs and conflict-affected people in Greater Darfur, Greater Kordofan, the Blue Nile states, refugees from South Sudan, Eritrea, and Ethiopia, people affected by inter-communal clashes and floods, and the chronically food-insecure areas of eastern and western Sudan. WFP plans to distribute over 83,560 metric tons and over 105 USD million in cash transfers to 8.7 million beneficiaries between August and December 2022.

UPDATED ASSUMPTIONS

Revisions to the assumptions used to develop FEWS NET's most likely scenario for the Sudan Food Security Outlook for June 2022 to January 2023 include:

- The national 2022/2023 harvest, particularly for staple food crops, is likely to be below average due to delays in planting, lower than typically planted acreage, and lower access to irrigation, finance, and agricultural inputs.
- Pastoral and daily wage-dependent households are expected to have limited purchasing power throughout the year due to sorghum prices increasing faster than goat prices and labor wages, the rising cost of food and non-food needs, limited access to income due to reduced economic activity, and increased competition for income-earning opportunities.
- Intercommunal violence in Darfur, Kordofan, Blue Nile, and Kassala states will continue to increase following the post-rainy season surge in violence due to the continued dispute over lands and natural resources and retaliatory cycles of violence. Violence is expected to escalate during the harvest season between November 2022 and January 2023.

PROJECTED OUTLOOK THROUGH JANUARY 2023

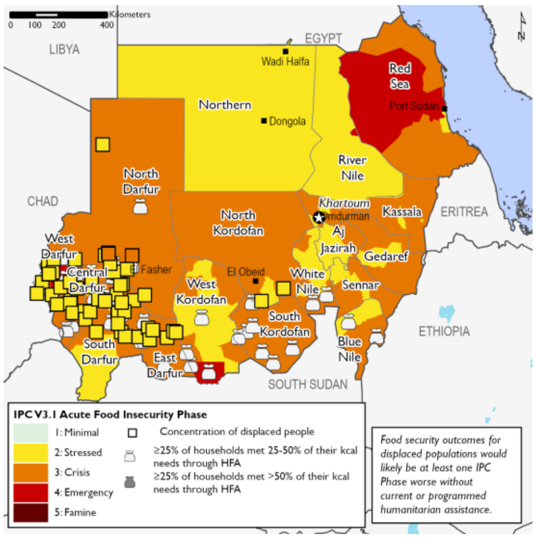
In September, household food stocks will diminish as the lean season peaks. Most poor households remain dependent on market purchases, in-kind payments from agricultural labor, social safety nets, and food assistance. The anticipated rise in the already high cereal and non-cereal food item prices and reduced sorghum-to-labor terms-of-trade will further reduce poor households' access to food. At the same time, the increase in intercommunal clashes in many areas will continue to limit households' access to cash income and food from agricultural labor, along with crop production and wild food collection. Poor households are likely to increase their reliance on support from safety nets and support from better-off households to reduce food consumption gaps. The most food-insecure households are recently displaced people and families affected by recent intercommunal clashes in the Blue Nile, parts of Darfur, parts of Kordofan, Kassala, and Abyei PCA, which are likely to face Emergency (IPC Phase 4) outcomes, particularly during the peak lean season in August and September. Additionally, protracted IDPs in Darfur, SPLM-N controlled areas of South Kordofan and the Blue Nile, poor households in the marginal areas of the northern Red Sea and Kassala, north of Darfur and Kordofan, the flood-affected households in the main flood-prone areas, and urban poor families are likely to face Crisis (IPC Phase 3) outcomes in September 2022.

From October 2022 to January 2023, the typical harvest period, acute food insecurity outcomes for most households will improve compared to the lean season as the expected harvest will likely increase household food access from own production, in-kind payments from agricultural labor, and in-kind *Zakat* of the crop by better-off households. Additionally, poor households are likely to increase their access to cash income from agricultural labor during the harvest period and the collection and sale of wild food and forest products; however, the conflict in Darfur, Blue Nile, and Kordofan will limit access to labor and forest products. Cereal prices will likely decline seasonally during the harvest but remain above average due to the anticipated high production and transportation costs. As a result, many areas in Sudan are expected to be Stressed (IPC Phase 2). However, most IDPs and poor households in conflict-affected areas will continue facing food consumption deficits and income below their livelihood protection thresholds, remaining in Crisis (IPC Phase 3) through January 2023.

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

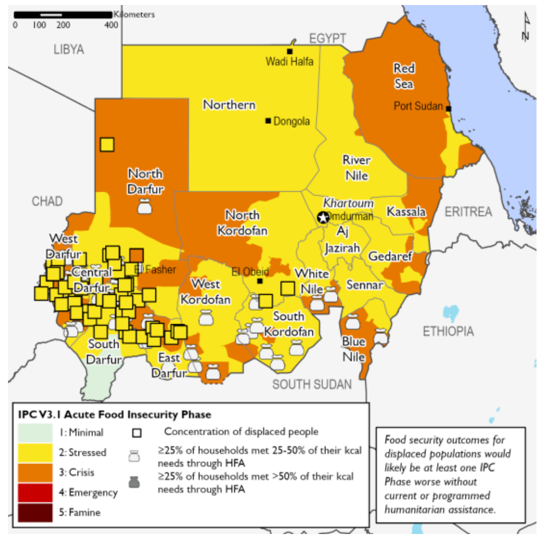
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food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

Projected food security outcomes, August to September 2022



Source: *FEWS NET*

Projected food security outcomes, October 2022 to January 2023



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ABOUT THIS UPDATE
This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET's Food Security Outlook, which is published three times per year. Learn more about our work here.