FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

SUDAN Food Security Outlook Update — December 2021

Locally produced staple food prices continue to atypically increase through the harvest season

KEY MESSAGES

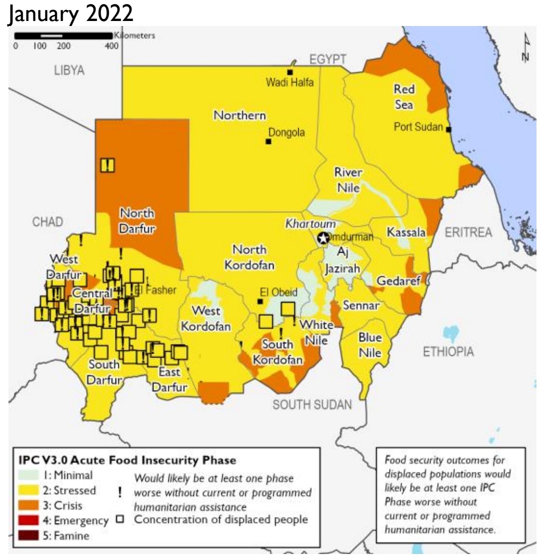
- Sudan will continue facing above-average emergency humanitarian assistance needs through the harvest period due to tribal clashes in Darfur and Kordofan displacing over 187,000 people in November and December, below-average household purchasing power due to the persistent macroeconomic crisis and significantly above average food prices, along with the continued influx of Ethiopian refugees. Crisis (IPC Phase 3) outcomes are likely among newly displaced households, newly arrived refugees, protracted IDPs in parts of Darfur and South Kordofan, and poor households affected by the persistent macroeconomic crisis.

- The ongoing 2021/22 main season harvest has been highly disrupted by the increased frequency of intercommunal clashes in parts of Darfur and Kordofan states and in semi-mechanized and irrigated sectors of Sudan where the high cost of labor is resulting in a labor shortage. The harvest of sesame and groundnut has been completed in most traditional and semi-mechanized rain-fed sectors, while the sorghum, millet, and cash crops harvests are ongoing and likely to continue through January 2022. Crop yields are reportedly impacted by dry spells during critical growth stages and damage from birds and animals raiding the farms, particularly in Darfur, North Kordofan, and northern Gadaref states. Nationally, a near-average harvest is expected.

- Staple food prices continue to atypically increase across most markets through the harvest. Prices increases are likely due to the extremely high production and transportation costs, repeated market disruptions by conflict, and continued civil unrest. In December, staple food prices increased by 10-15 percent in most monitored markets and remained 70-80 percent higher than last year and almost four times above the five-year average.

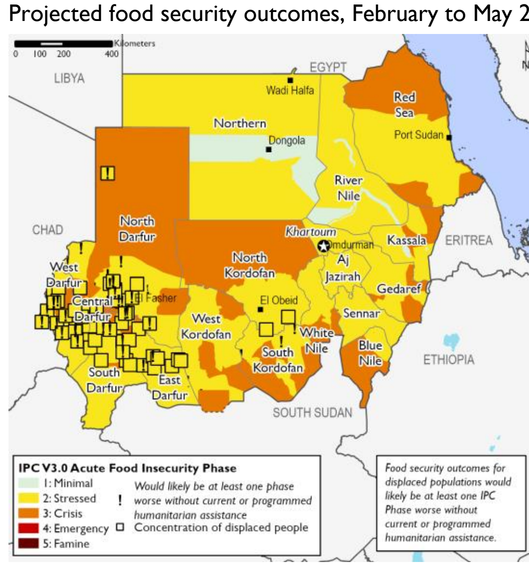
- Between October and December, intercommunal violence has significantly increased in Darfur and Kordofan states compared to last year. The main harvest season coincides with the seasonal movements of nomadic groups into southern grazing areas, increasing the level of confrontations between pastoralists and farmers. Intercommunal violence in Darfur and Kordofan is likely to increase in December and January as more nomadic groups travel to the southern grazing areas.

Projected food security outcomes, December 2021 to January 2022



Source: *FEWS NET*

Projected food security outcomes, February to May 2022



Source: *FEWS NET*

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USAID FROM THE AMERICAN PEOPLE

CURRENT SITUATION

Conflict and political instability

Political tension between the military and civilian elements of Sudan's Transitional Authority remains very high despite the reinstatement of Abdallah Hamdok as Prime Minister on November 21, 2021. Mass protests and civil disobedience campaigns continue to occur across the country, interrupting people's access to banks, markets and reducing income-earning opportunities for urban poor households employed in daily labor and small business. Because of the disruption to market activity and trade flows, there are supply shortages, contributing to increases in the prices of goods and reducing household purchasing power.

On December 17, the Eastern Sudan Track of the Juba Peace Agreement was suspended for two weeks to resolve outstanding issues between stakeholders of eastern Sudan and maintain port activity and highways in Red Sea state. Between September 17 to October 31, 2021, the previous ports and highways closures in Red Sea state disrupted trade activity, resulting in significant shortages of basic commodities, such as medicine, wheat flour, and fuel across Sudan. The impact of the port closures is contributing to the maintenance of above-average food and non-food prices in December 2021.

As of mid-December 2021, inter-communal clashes significantly escalated across Sudan, particularly in North Darfur, West Darfur, Central Darfur, West Kordofan, and South Kordofan states. The clashes have resulted in the burning of villages and farms, the looting of assets including livestock, and fatalities. According to the IOM's Displacement Tracking Matrix (DTM), in November and December 2021, approximately 188,500 people (over 18,600 households) have been displaced from Jebel Moon and Kerink areas in West Darfur, Tawilla, and Al Serief areas in North Darfur, Azoum area in Central Darfur, Kalogi and Delami areas in South Kordofan, and the Al Nuhood area in West Kordofan states due to intercommunal clashes and attacks on villages by armed groups. According to UNHCR, as of November 30, over 2,200 Sudanese people crossed into Chad due to the intercommunal clashes but are likely to return when the security situation improves. Interagency assessments in some affected areas report that newly displaced households require food, water, health, sanitation and hygiene, shelter, non-food items, protection, and education resources. The recent clashes are likely to compromise crop production and household food stocks in most affected areas, as most households fled before harvesting their crops.

COVID-19

As of December 26, 2021, Sudan has cumulatively confirmed 46,100 COVID-19 cases since March 2020, with over 2800 cases being confirmed in December. Approximately 89 percent of the confirmed COVID-19 cases are in Khartoum, with 3 percent of cases in El Gezira, 2 percent of cases in River Nile state, and about 1 percent of cases in El Gedaref, Kassala, Sennar, South Darfur, and White Nile state. However, availability and access to COVID-19 tests across the country remain limited. According to the Federal Ministry of Health (FMoH) and WHO, COVID-19 vaccination coverage remains low. By mid-December, around 4 million people have received at least one vaccine dose, around 9 percent of the population.

Macroeconomic crisis and prices

Sudan's macroeconomic situation remains poor following the suspension of economic support from the World Bank, the USA, the European Union, and IMF in response to the overthrew of the civilian transitional government. The loss of over 2 billion USD in economic support has paused the implementation of economic reforms. However, the SDG has remained relatively stable in the official banking system and the parallel market. The official SDG exchange rate is 439-446 SDG/USD in December, with the parallel market rate trading at 448-452 SDG/USD. The stability in both the official and parallel market is likely due to suppressed economic activity following the civilian government's overthrow and speculation that international economic support may return in early 2022. Although the SDG has remained relatively stable, limited market supplies and high prices are limiting household food access, particularly in urban and peri-urban areas and market-dependent pastoral areas. The poor macroeconomic situation is likely to persist through early 2022 as political instability continues and the economic support by the international community remains on hold.

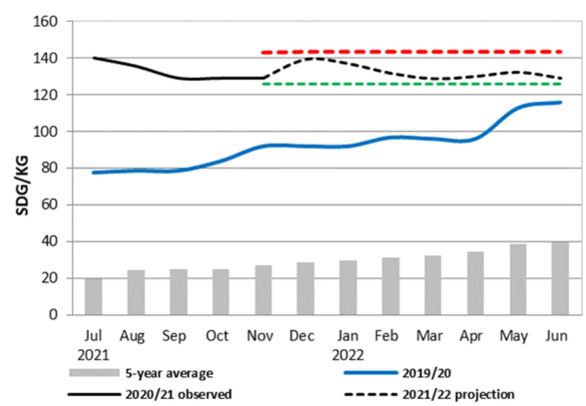
Main season harvest and progress of winter season

The harvest of the main cash crops (sesame and groundnut) is complete in most of the rain-fed, semi-mechanized, and traditional sectors, while the harvest of cereal crops and other cash crops including cotton, sunflower, and pigeon peas is still ongoing and expected to be completed in January 2022. However, the ongoing harvest is being disrupted by the intercommunal clashes across many areas of the Darfur and Kordofan states, and the shortage and high labor cost across the semi-mechanized and irrigated sectors. Informants in the field report that crop yields are reportedly lower than normal in some parts of the rain-fed sector of Darfur and the northern part of North Kordofan states due to dry spells at critical growth stages in September, pest infestations, and livestock damage. Nationally, the harvest is likely to be lower than last year's harvest and near the five-year average.

Since November, planting for the 2021/22 winter wheat season has been ongoing in most of Sudan's main wheat production areas. Approximately 882,000 feddan (370,000 hectares) have been targeted for planting, almost 12 percent lower than targeted areas for the 2020/21 season. Field information indicates that planting has been constrained by the high costs and shortages of agricultural inputs, particularly fertilizer. Around 51 percent of the targeted area is located in the main-irrigated schemes of Al Jazeera, with about 10 percent of the targeted area in the Rahad and Halfa El Gadeeda irrigated schemes, along with small-scale cultivation in Northern, River Nile, and White Nile states. Around 50-70 percent of the targeted area has been planted, with the remaining area likely to be planted in January.

Staple food prices

Figure 1. Retail prices of sorghum and projection, El Obied market, North Kordofan, July 2021-May 2022



Source: *FEWS NET/FAMIS*

Staple food prices continue to atypically increase during the harvest period, driven by extremely high production costs, delayed harvest, and repeated market disruptions from conflict and civil unrest. In December, sorghum and millet prices increased 10-15 percent in most markets and remained 70-80 percent higher than respective prices in 2020 and almost five times above the five-year average. In December, sorghum and millet sold on average in most markets for 140 SDG/kg and 272 SDG/kg, respectively, a 1-8 percent increase compared to prices in November. Locally produced wheat sold on average for 410 SDG/kg in December, a 6 percent increase compared to November and 200-400 percent above the five-year average. The unseasonal increase in sorghum and millet prices is likely driven by the disruption of the harvest in many areas by intercommunal clashes, delays in the harvest due to the high cost and shortage of labor, high production and transportation costs, market function disruptions from political instability and continued civil unrest. The high prices are likely impacting household purchasing power, particularly in urban and peri-urban areas and pastoral areas where households typically purchase their food from the market.

Livestock exports resumed in mid-December following the reopening of the ports in eastern Sudan. In November, livestock prices showed mixed trends across most markets. Goat prices increased by 10-25 percent in Um Dorman, El Obied, Kassala, and El Damer markets but decreased by approximately 10-15 percent in Nyala, El Fasher, Zalengi, and Sennar markets. However, sheep prices increased 10-15 percent in Geneina, Madani Kadugli, and Zalengi markets while decreasing by 10-20 percent in Nyala, Sennar, Ad Dain, and El Damer markets. In November 2021, goat and sheep prices were approximately 200 percent above respective prices for 2020 and over five times above the five-year average. The price variances are likely driven by local supply and demand dynamics and insecurity constraining market access. In many areas, livestock began migrating south earlier than normal due to limited pasture and water in some northern grazing areas. However, the cost of livestock transportation and tribal clashes in West Kordofan, North Darfur, West Darfur, and South Kordofan have disrupted access to the main livestock markets in the conflict-affected areas along with supply to other major markets like Khartoum.

Humanitarian assistance

In November 2021, WFP and implementing partners provided approximately 6.1 million beneficiaries with around 258,000 MT of in-kind food assistance and 41.2 million USD in cash transfers. Most beneficiaries are IDPs and conflict-affected people in Greater Darfur, government-controlled areas of South Kordofan and the Blue Nile, refugees from South Sudan and Ethiopia, and chronically food-insecure areas of eastern and western Sudan. According to OCHA, the humanitarian response to the conflict in South Kordofan and Darfur is being planned or underway; however, safety and security challenges are impeding timely access to some locations. Because of the insecurity, humanitarian access to SPLM-N-controlled areas of South Kordofan and parts of Jebel Marra and the Blue Nile remains irregular.

UPDATED ASSUMPTIONS

Revisions to the assumptions used to develop FEWS NET's most likely scenario for the Sudan Food Security Outlook for October 2021 to May 2022 include:

- Political tensions will likely remain high in Khartoum through May 2022 following the overthrow of the civilian-led transitional government on October 25, 2021. Civil unrest will likely remain elevated in Khartoum, and other major cities as pro-democracy and anti-government groups hold frequent demonstrations to remove military elements from the ruling council. Protests are likely to escalate around significant dates/anniversaries related to previous civil unrest campaigns or in response to announcements from government leaders regarding the military's continued involvement in domestic politics and any potential delay to the election timetable

- Levels of intercommunal violence in Darfur and Kordofan are likely to increase further as the number of seasonal nomadic groups moving into southern grazing areas increases in December and January. Following a spike during these months, violence is likely to subside from February 2022 onward but remain higher through May 2022 compared to 2021 due to increasing competition for natural resources between pastoralists and farmers, and competition for grazing resources between pastoralists groups.

PROJECTED OUTLOOK THROUGH MAY 2022

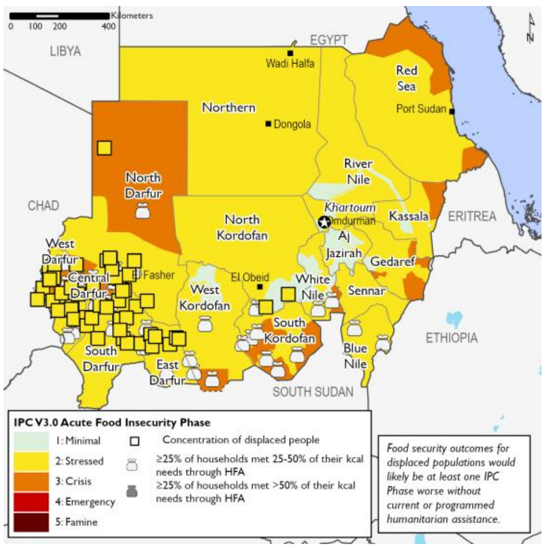
The ongoing 2021/2022 main agricultural season harvest in December and January is expected to slightly improve household food access due to the localized below-average harvests and high staple food costs limiting household purchasing power. Poor households are expected to sell cash crops to purchase cereal to improve food stocks. Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are expected across most of Sudan as households harvest their own crops, access milk and meat from livestock, and receive in-kind payments for agricultural labor. However, Crisis (IPC Phase 3) outcomes are likely among IDPs, households recently affected by inter-communal clashes, protracted IDPs in SPLM-N controlled areas of South Kordofan, and newly arrived refugees in eastern Sudan. Emergency food assistance needs are expected to remain high through the harvest due to inter-communal clashes displacing households, the continued influx of refugees from Ethiopia, and the persistent poor macroeconomic situation limiting household purchasing power.

February to May 2022 covers most of the post-harvest period and the beginning of the lean season in Sudan. During the post-harvest period of February to April 2022, food security outcomes typically remain relatively stable. However, if international economic support is not returned, the SDG will likely begin depreciating, along with rising commodity and fuel prices, as households become more market dependent and government access to hard currency diminishes. The return to instability in the macroeconomy is likely to impact urban and market-dependent households the most. In rural areas, food security is likely to begin to seasonally deteriorate by April, at the beginning of the lean season, as household food stocks begin to diminish. Following the end of the harvest in January, in-kind payments from agricultural labor, cash crops, and livestock are also typically at seasonal lows from February through May. Therefore, more households are expected to increase their dependency on food from market purchases at the same time as staple food prices begin to increase seasonally. The anticipated increase in already well-above-average prices of food and non-food items, along with low household purchasing power, will continue to drive higher needs than is typical. An increased number of IDPs and poor households in conflict-affected areas of greater Darfur and SPLM-N areas of South Kordofan and increased numbers of poor households in parts of North Darfur, northern Kassala, and much of Red Sea states are likely to face moderate food consumption gaps by April as limited access to income and diminishing food stocks result in increased engagement in coping strategies indicative of Crisis (IPC Phase 3) food security outcomes.

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, December 2021 to January 2022



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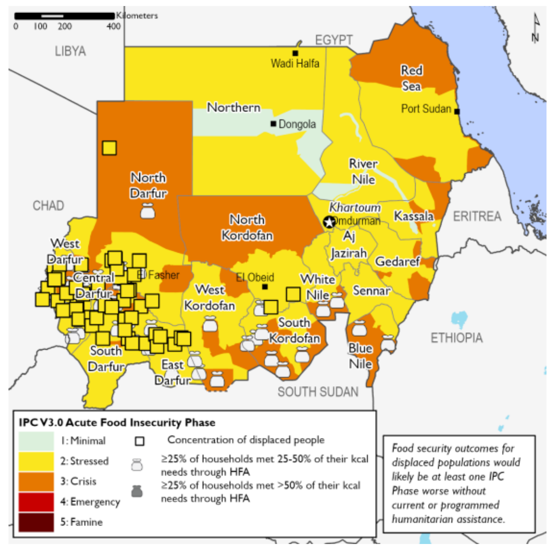

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ABOUT THIS UPDATE

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.