SUDAN Food Security Outlook Update | August 2019

Flooding risk remains high as heavy rainfall continues during the lean season

KEY MESSAGES

- Sudan received above-average rainfall in August 2019, resulting in above-average seasonal totals. Remote sensing products indicate rainfall has been well distributed over time, although consistent rainfall in Sudan and in the Ethiopian highlands has led to river flooding in several states.

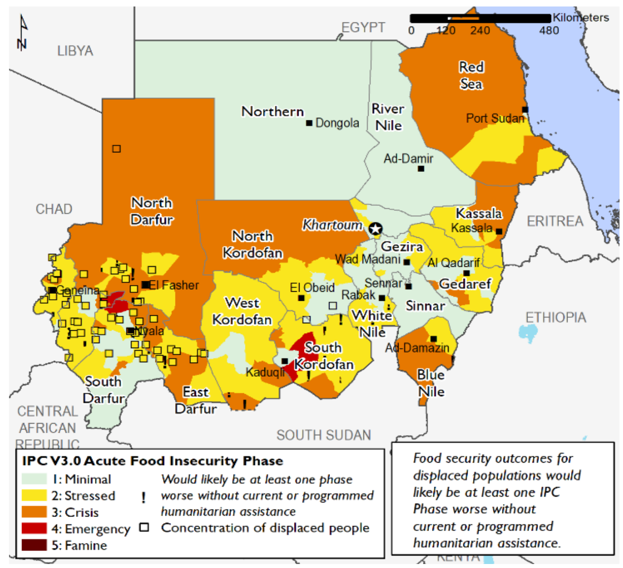
- As of late August 2019, OCHA and the Humanitarian Aid Commission (HAC) estimate 245,700 people have been affected by heavy rains and flash floods across 15 states in Sudan. Approximately 32,851 homes have been destroyed and another 16,284 were damaged. Heavy rains through August are expected to worsen flooding in River Nile, Red Sea, Al Jazeera, White Nile, North Kordofan, North Darfur, and Khartoum states.

- Cereal prices increased across Sudan in July 2019 due to seasonal trends and the poor macroeconomic situation. Sorghum prices increased 10-20 percent between June and July, remaining on average 55 percent higher than in July 2018 and 220 percent above the recent five-year average. Livestock prices increased across all markets between June and July and were on average 150 percent above last year and over 300 percent above the five-year average.

- IDPs and poor households in SPLM-N controlled areas of South Kordofan and parts of Jebel Marra of Darfur are expected to face large food consumption gaps and be in Emergency (IPC Phase 4). Poor households in parts of Red Sea, North Darfur, Northern Kassala, and North Kordofan will be in Crisis (IPC Phase 3) during the peak of the lean season in August and September 2019.

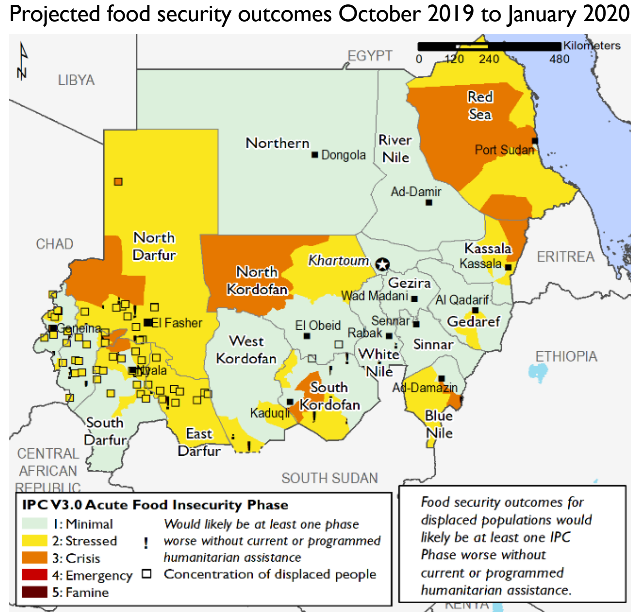
- Food security is expected to improve as harvests begin in October, and most parts of Sudan will be in Minimal (IPC Phase 1) or Stressed (IPC Phase 2). Much of North Darfur, parts of Jebel Marra and South Kordofan, southern Blue Nile, northern Kassala, and parts of North Kordofan will remain in Crisis (IPC Phase 3).

Projected food security outcomes, August to September 2019



Source: *FEWS NET*

Projected food security outcomes October 2019 to January 2020



Source: *FEWS NET*

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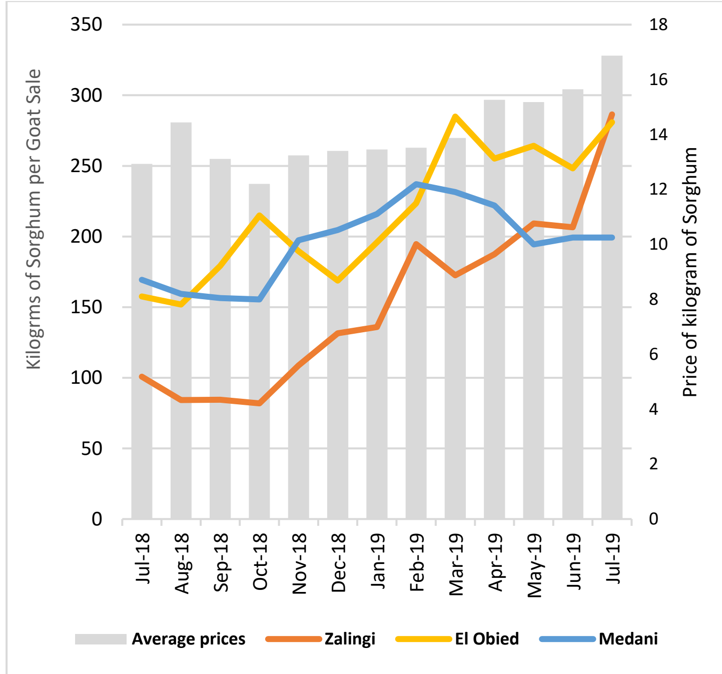
CURRENT SITUATION

August is typically the peak of the lean season in Sudan, a time when access to food remains seasonally low despite improvements in access to agricultural labor opportunities. Households' food stocks from own production are exhausted and cereal prices are at their highest levels. Market supplies of locally produced main staples (sorghum and millet) continue to increase throughout August and September, before starting to decrease as harvests begin in October.

Figure 1. Sorghum to goat terms-of-trade in selected markets



Source: *FAMIS/FMoA*

Between early June and late August, most areas received above normal rainfall with good spatial and temporal distribution, according to CHIRPS. Remote sensing products indicate rainfall has been well distributed over time, although consistent rainfall in Sudan and in the Ethiopian highlands has led to river flooding in several states.

The above-average rainfall between June and August 2019 continues to facilitate favorable crop development and pasture regeneration across different parts of the country. Nevertheless, pockets of below-average crop development have been identified in parts of North Darfur, North Kordofan, Kassala, and Blue Nile states, which were affected by delayed cultivation and dry spells during June and July. Heavy rains and flooding during August have also caused considerable damage to some cropped areas in Jazeira, Sennar, Blue Nile, and White Nile states. The Normalized Difference Vegetation Index (NDVI) indicates above-average vegetation across wide areas of the country during August as result of the above-average rainfall and earlier than average start of the growing season, while NDVI shows average and below-average conditions in some areas affected by dry spells and flooding.

Heavy rains and flooding have been reported in Khartoum, Kassala, El Gezira, Red Sea, River Nile, Greater Darfur, and Greater Kordofan states. In these areas, reports indicate flooding has caused losses of life and livelihood assets including livestock, homes, infrastructure, and cropped areas. As of late August 2019, OCHA and the Humanitarian Aid Commission (HAC) estimate 245,700 people have been affected by heavy rains and flash floods across 15 states in Sudan. Approximately 32,851 homes have been destroyed and 16,284 were damaged. Heavy rains expected through August in River Nile, Red Sea, Al Jazeera, White Nile, North Kordofan, North Darfur, and Khartoum states are expected to worsen flooding. The impact is expected to be very severe among poor households in affected areas due to their limited capacity to withstand and cope with the shock.

The continued shortage of hard currency and the rapid depreciation of the Sudanese Pound (SDG) have significantly reduced the ability of both the private sector and the government to import required amounts of essential food and non-food items. The official exchange rate remains 45 SDG/USD, and while it has weakened from 58 SDG/USD in January to 63-68 SDG/USD in August. By August 2019, wheat flour and other imported food items and fuel shortages persist across the country, the latter of which is driving up the cost of transportation to more than double that of last year. Shortages of fuel, wheat, and wheat flour also persist. Combined with currency depreciation, these shortages are driving high food prices. According to the Sudan Central Bureau of Statistics, the national inflation rate increased from 48% in June 2019 to 52% in July 2019, while reaching 54% in rural areas. SCBS attributes this to increases in prices of basic food items such as cereals, pulses, and meat.

Fuel shortages and high prices for agricultural inputs and agricultural labor continue to negatively impact the ongoing 2019/20 season. Although these factors are relatively less important in the traditional sector, which accounts for over half of the area planted, they are key to cultivation in the semi-mechanized and irrigated sectors, which together make up slightly less than half of the area cultivated. Government fuel distributions are supporting increased cultivation to some extent, though some farmers continue to indicate that fuel shortages have resulted in delayed land preparation and planting. The overall area planted is anticipated to be below average.

Cereal prices increased across Sudan in July, due to both seasonal trends and the poor macroeconomic situation. Prices of sorghum increased by 10-20 percent between June and July 2019 and remained on average 55 percent higher than in July 2018 and 220 percent above the recent five-year average. In El Gadaref, which is the main area of production in Sudan, sorghum prices increased by 14 percent in July compared to June and were 40 percent above the same time last year and 220 percent above the recent five-year average. Wheat prices increased 5-15 percent and remained on average 75 percent above last year and about 230 percent above the recent five-year average. Livestock prices increased across all markets between June and July and are on average 150 percent above last year and over 300 percent above the five-year average. The heavy rainfall also affected the movement of livestock from production to the main markets/towns, constraining supply at a time of high demand for both local consumption and exports for Eid Al Adha and Haj festivals.

In El Obied market, goat to sorghum TOT in July improved in favor of livestock holders between June and July due to a 12 percent increase in goat prices while sorghum prices remained unchanged. July 2019 levels of terms-of-trade remained 75 percent above last year. Nevertheless, poor household purchasing power remained lower than last year and the five-year average due to the continued high inflation and local currency depreciation.

UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET's most likely scenario for the Sudan Food Security Outlook for June 2019 to January 2020 remain unchanged.

PROJECTED OUTLOOK THROUGH JANUARY 2020

- Food insecurity is expected to remain severe during September, the peak of the lean season in Sudan. Food security outcomes will gradually improve during the October to January harvest period, a time when households benefit from access to food through own harvests, seasonal declines of staple food prices, and improved access to income from the sale of cash crops and/or seasonal agricultural labor.

- Despite the fact that October 2019 to January 2020 covers the pre-harvest and harvest period in Sudan, food security outcomes among poor households in many areas are expected to remain more severe than is typical for this time period. Poor households will still face difficulty affording many essential non-foods needs and, as a result, many areas will remain Stressed (IPC Phase 2) between October 2019 and January 2020. Much of North Darfur, parts of Jebel Marra and South Kordofan, southern Blue Nile, parts of North Kordofan and West Kordofan, northern Kassala, and much of northern Red Sea states will be in Crisis (IPC Phase 3) due to their high dependency on market purchase and their remoteness from areas of high production which coupled with high transportation costs will lead to some of the highest food prices in the country.

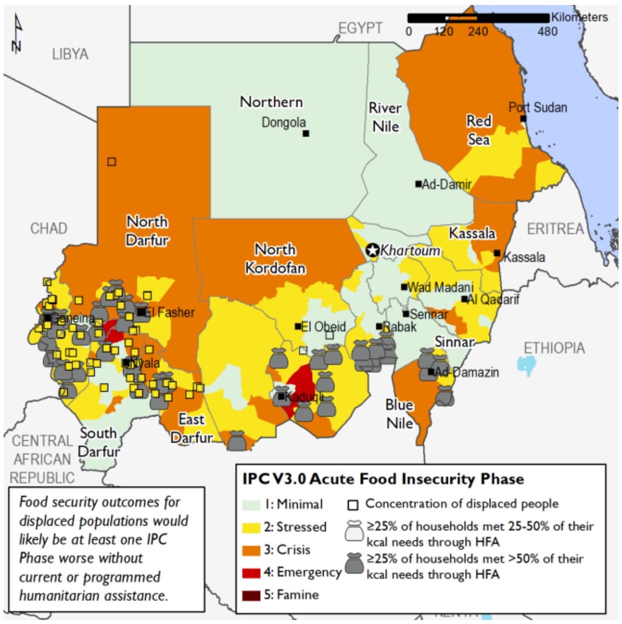
ABOUT THIS UPDATE

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.

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

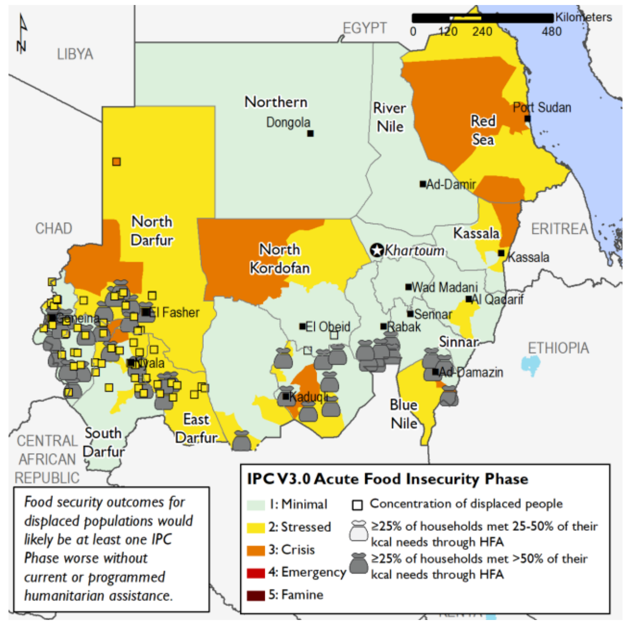
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food 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 2019



Source: *FEWS NET*

Projected food security outcomes, October 2019 to January 2020



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