FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

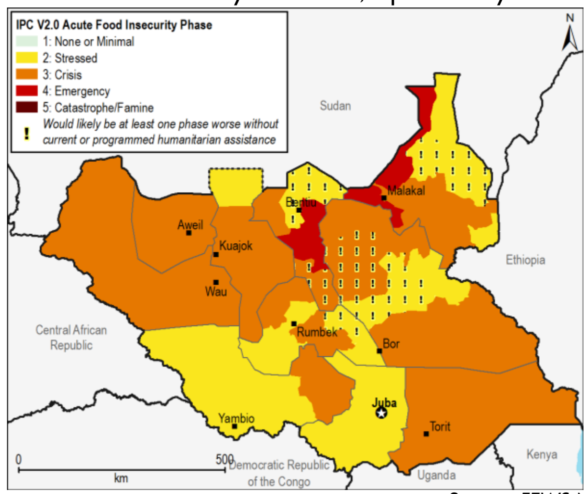
SOUTH SUDAN Food Security Outlook Update — April 2016

Staple food prices increasing more rapidly than expected

KEY MESSAGES

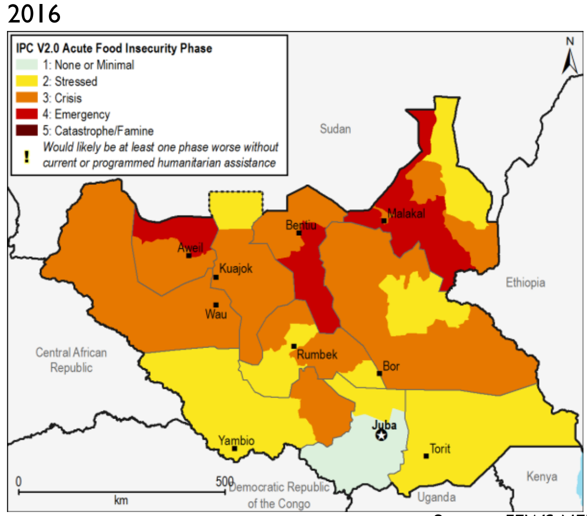
- Large areas of Greater Upper Nile (GUN) continue to experience Emergency (IPC Phase 4) acute food insecurity. Households in these areas are facing an increased risk of malnutrition and excess mortality. In Unity State, it is expected that a small population of households are in Catastrophe (IPC Phase 5). Crisis (IPC Phase 3) acute food insecurity persists across larger areas of the country as many households face significant difficulty meeting their basic food needs.
- Staple food prices have increased considerably as a result of local currency depreciation, below-average 2015 production, fuel shortages that have increased transportation costs, and continued conflict that has reduced market functioning. High prices continue to limit household food access, especially among market-dependent poor households in urban areas. In Juba, the price of sorghum in March was 400 percent above the five-year average.
- Conflict is expected to reduce below 2015-levels with the formation of the Transitional Government of National Unity. However, it is possible isolated security incidents and tensions will continue between government forces and armed groups not affiliated with parties to the peace agreement. Additionally, tensions arising from disagreement over cantonment areas in Greater Bahr el Ghazal and Greater Equatoria are likely to continue.

Current food security outcomes, April to May 2016



Source: *FEWS NET*

Projected food security outcomes, June to September 2016



Source: *FEWS NET*

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect *chronic* food insecurity. Visit www.fews.net/foodinsecurityscale for more on this scale.

CURRENT SITUATION

Throughout April, sporadic attacks have continued in Western Bahr el Ghazal, Western Equatoria, and parts of Unity and Upper Nile State, despite the peace deal signed by the Government and the Sudan People's Liberation Army in Opposition (SPLA-IO) in August 2015. However, Jonglei and most parts of Upper Nile have remained relatively calm in recent months compared to last year. With the recent return and swearing in of First Vice President Riek Machar, it is assumed conflict will further reduce with the formation of the Transitional Government of National Unity. It is possible, however, that clashes will continue between government forces and other armed groups not affiliated with parties to the peace deal. Additionally, tensions arising from disagreement over cantonment areas in the Greater Bahr el Ghazal and Greater Equatoria areas are likely to continue.

Although the South Sudanese Pound (SSP) has appreciated from 41 SSP/USD in March to 31 SSP/USD in April, macroeconomic conditions remain very poor. The scarcity of foreign reserves and depreciation of the SSP has reduced the quantity that traders are able to import and put many out of business. FEWS NET's cross border monitoring indicates that sorghum imported from Uganda, the largest staple exporter to South Sudan, in the first quarter of 2016 was approximately three times lower than the first quarter of 2015. Similarly, sorghum imports from Ethiopia were 84 percent lower in the first quarter of 2016 than 2015.

In March, prices of staple foods remained exorbitantly high, increasing more rapidly than previously expected. Fuel shortages continue to increase the cost of transporting food to interior markets, reducing market supply and contributing to high food prices. According to the National Bureau of Statistics, the South Sudan annual Consumer Price Index (CPI) increased by 245.2 percent from March 2015 to March 2016. Over the same time period, the price of sorghum increased 446 percent in Juba, 408 percent in Wau, and 392 percent in Aweil. Compared to the five-year average, sorghum prices in March were 446, 507, and 571 percent above-average in Juba, Wau, and Aweil, respectively.

The start of first season rainfall was mixed in the bimodal areas of Western and Central Equatoria. A timely onset of rainfall was observed in April in Western Equatoria, but conflict-related displacement is limiting farmers' access to planting their fields and below-average production is expected for some poor households. Rainfall has been erratic in Central Equatoria in April, but is expected to become fully established in May. The June to September main rainy season in most parts of South Sudan is forecast to be near-average tending to above-average in terms of total cumulative rainfall.

Livestock body conditions continue to deteriorate seasonally as the dry season progresses. Most livestock in GUN have been kept near homesteads due to the threat of cattle raiding and general insecurity. As a result, households have some access to livestock products, although at seasonally low levels. An assessment conducted in March by DCA, Nile Hope, and LWF found that livestock in Panyikang and Nasir counties of Upper Nile are currently grazing along Lol and Sobat rivers near homesteads, similarly allowing households access to milk. Livestock from Bor in Jonglei State have been migrated to Central and Eastern Equatoria where the security situation is relatively calm. Livestock owners in Nasir County were reportedly bartering their livestock for cereal at the border with Ethiopia.

UPDATED ASSUMPTIONS

The current situation has not affected most of the assumptions used in South Sudan Food Security Outlook for February to September 2016. However, the following assumption has been updated:

- An analysis in March has indicated that staple food prices have increased more rapidly than expected, further reducing purchasing power as wage and livestock prices are not increasing in line with food inflation. Prices are expected to remain well above average.

PROJECTED OUTLOOK THROUGH SEPTEMBER 2016

During the May to July lean season, many households will rely mostly on fish, livestock products, and wild foods. In the bimodal areas of Western and Central Equatoria, the first season harvest in July is expected to improve food consumption, although the harvest is likely to be slightly below average in in both areas.

In both Greater Bahr el Ghazal and Greater Upper Nile, given the high cost of importing, a relatively low level of commercial stocks were prepositioned in markets in preparation for the rainy season, when road access will limit trade. As a result, it is expected market stocks will be depleted earlier than usual. Of particular concern are Aweil North and Aweil East in northern Bahr el Ghazal where it is expected that significant populations will deteriorate to Emergency (IPC Phase 4) during the May to July lean season when wild foods are less available and better-off households have less stocks to share. However, food security is expected to improve slightly in August/September when fishing becomes more available, green consumption begins, and livestock productivity increases.

Large areas of GUN are expected to remain in Emergency (IPC Phase 4) acute food security, with households facing an increased risk of malnutrition and excess mortality. In central Unity State, specifically in Koch, Mayendit, Guit, and Leer where food access has been very limited, an increasing number of households are expected to move into Emergency (IPC Phase 4). A smaller population of worst-affected household in central Unity are expected to be in Catastrophe (IPC Phase 5). In Greater Equatoria, Jonglei, and Greater Bahr el Ghazal, Crisis (IPC Phase 3) acute food insecurity is expected to persist, and households will continue to experience food consumption gaps in light of reduced market supplies, high market prices, and limited income.