SOUTH SUDAN Food Security Outlook January to September 2015

3.5 million people will require emergency humanitarian assistance by June

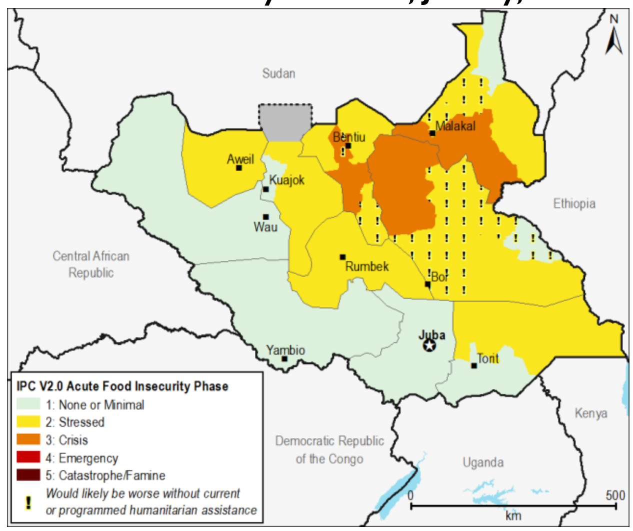
KEY MESSAGES

- Food security in January was better than expected given lower than anticipated levels of conflict and improved trade flows. However, the number of people facing Crisis (IPC Phase 3) and Emergency (IPC Phase 4) still increased by roughly 30 percent between December and January.

- The macroeconomic situation in South Sudan remains unstable. Local currency depreciated by 30 percent between November and December 2014, increasing the cost of regional food imports. Foreign currency shortages and high transport costs are increasing staple food prices, already above-average in many markets across the country.

- A significant deterioration in food security is likely in the coming months and the size of the food insecure population (IPC Phase 3 or higher) is likely to almost double by June. The South Sudan National IPC estimates that 2.5 million people will face Crisis and Emergency food insecurity between January and March. Needs will peak between May and June when FEWS NET estimates that more than 3.5 million people will face Crisis (IPC Phase 3) and Emergency (IPC Phase 4) and 2 million people will face Stressed (IPC Phase 2) food insecurity, nearly half the national population.

Current food security outcomes, January, 2015



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.

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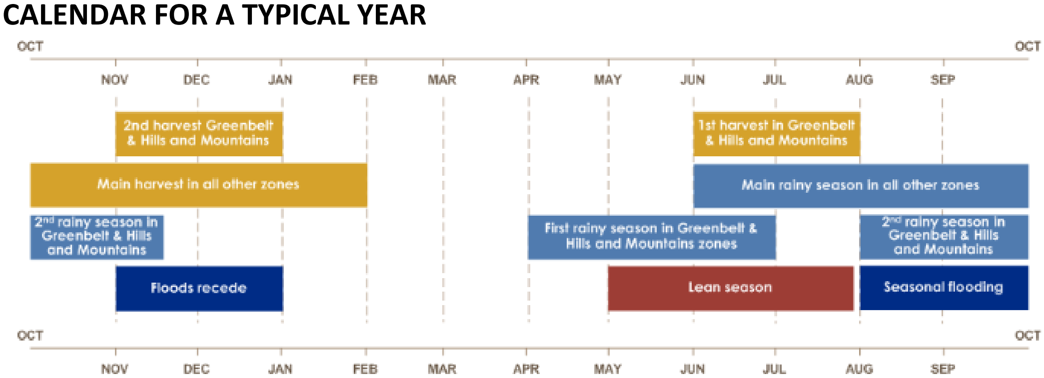
- Humanitarian assistance delivery to Greater Upper Nile (GUN) in 2015 is likely to be better than last year due to increased overland transport access, stronger logistics capacity, and improved prepositioning ahead of the rainy season. FEWS NET estimates that emergency assistance is likely to have a significant impact on food security outcomes among worst-off households in over a dozen counties from January to June mitigating deterioration in these areas. However, insecurity and humanitarian access restrictions will continue to constrain assistance delivery, particularly in frontline areas.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: *FEWS NET*

NATIONAL OVERVIEW

Current Situation

Conflict between the Government of the Republic of South Sudan (GRSS) and the Sudan People's Liberation Army-In Opposition (SPLM-IO) continued in the Greater Upper Nile (GUN) region during the last quarter of 2014 and early 2015. As of January 2015, conflict intensity has remained below that of last year and heavy fighting remains relatively confined to Duk, Canal, Nasir, and Rubkona counties, considered to be frontline areas. However, the national conflict has fueled local tensions in areas outside of GUN causing broader and increasing political instability in other states. This instability has been most acute in Lakes State, where internal conflict caused by political unrest and inter-communal violence has escalated in recent months.

The United Nations Office for the Coordination of Humanitarian Affairs (OCHA) estimates that 200,000 people were displaced from October to January. Of the 2 million people displaced since the conflict began just over a year ago, one quarter have migrated to neighboring countries. The majority of internally displaced persons (IDPs) remains in GUN. OCHA estimates over 150,000 people are displaced within Lakes State due to internal conflict in several counties and migration from neighboring Unity.

The macroeconomic situation in the country remains unstable, as evidenced by the depreciation of the South Sudanese Pound (SSP), a reduction in foreign exchange reserves through which to purchase commodities on regional markets (food, medicine, and fuel), and reductions in national revenue due to declining global crude oil prices. Although the official exchange rate is pegged at 2.96 SSP to 1 U.S. Dollar (USD), the parallel exchange rate depreciated by approximately 30 percent from December to January and reached above 6.5 SSP for 1 USD in mid-January, compared to 3.8 SSP in late May 2014. Foreign currency reserves obtained through oil exports—South Sudan's primary source of foreign currency—have declined over the last year due to depressed oil production and the recent drop in global prices of crude oil. Persistent fuel shortages, due to the government's inability to maintain fixed petrol and diesel prices is putting additional pressures on transport costs.

Staple food prices are following seasonal trends, but remain above-average, and very high in areas affected by conflict. With the onset of the dry season, trade routes have started to reopen across the country, increasing supplies to areas previously inaccessible due to flooding. However, commodity pre-stocking in markets is not occurring as it typically does at this time of year. Traders have reported stocking only small volumes of goods that sell out quickly due to perceived threats of insecurity and spread of conflict. Overall, food prices have declined seasonally due to increased local food availability from harvests and increased trade flows to rural markets. However, prices remain higher than last year and the five-year average in many markets due to persistent fuel shortages, rising inflation, and continued depreciation of the South Sudanese Pound (SSP), which have increased transport and import costs. Conflict in Lakes State has also disrupted trade along the Juba-Rumbek corridor and reduced commodity supplies to Lakes and surrounding states, putting further upward pressure on food prices in Lakes, Warrap, and Greater Bahr el Ghazal. In GUN, despite well below-average harvests, increased trade flows have eased price shocks in many markets, although prices remain very high with high variability within states and across counties.

Humanitarian assistance delivery improved in December due to increased overland accessibility. Increased overland access has improved humanitarian assistance delivery compared to previous months in Jonglei and Upper Nile states. However, deliveries remained below planning targets. General food distributions (GFD) in Unity remained extremely limited, with most counties receiving no aid in December.

The severity of food security in GUN has not worsened as quickly as anticipated, but the food insecure population increased significantly from December to January. Information from key informants and Inter-Agency Needs Assessments (IRNAs) conducted between late December and January in Guit, Mayom, Ayod, and Canal/Pigi counties indicate that food security outcomes did not deteriorate to Emergency (IPC Phase 4) in January due to better than expected current conditions including reduced conflict intensity, improved market functioning, and harvests in some areas. However, the size of the food insecure population grew by roughly a third since December and FEWS NET estimates that 2 million people are currently in Crisis (IPC Phase 3) and Emergency (IPC Phase 4).

The largest portion of the population facing Crisis and Emergency is in Jonglei, Unity, and Upper Nile states. Food security is worst in Rubkona County (Unity) where humanitarian assistance has mitigated Emergency outcomes (IPC Phase 3!) and in Duk, Ayod, Fangak, and Canal (Jonglei); Baliet, Ulang, and Nasir (Upper Nile); and Koch, and Mayendit (Unity) counties where Crisis (IPC Phase 3) persists. Food aid has substantially mitigated food insecurity in eight counties in GUN where households are currently meeting minimum food needs, but only with humanitarian assistance, and are therefore classified as IPC Phase 2!.

Intensified inter-communal conflict in Lakes State in recent months has caused widespread displacement, disrupted livelihoods, and interrupted market functioning and trade flow, impacting food security in three states. Fighting has spilled over to border areas of Warrap. In addition, above-average late season flooding caused crop damage across Lakes and southern Warrap, as well as in localized areas of Greater Bahr el Ghazal, reducing food availability in these areas. Ongoing fighting and political volatility has discouraged trade flow through Lakes, a key transport corridor to destination markets in Warrap and Greater Bahr el Ghazal, both heavily on commodity inflows from other regions to supply markets. Reduced market supply to these areas has caused food prices to rise. The combination of below-average household production, increased market dependence, and rising prices has reduced household access to food. Households currently face Stressed (IPC Phase 2) across most of Lakes, Warrap, and Northern Bahr el Ghazal states. Country-wide, a total of 1.2 million are currently Stressed (IPC Phase 2).

National Assumptions

From January to September, the projected food security outcomes are based on the following national assumptions:

Conflict: Conflict between the GRSS and the SPLM-IO is likely to intensify during the January to April dry season, but remain below 2014 levels. Although heavy fighting is expected to remain concentrated in the frontline areas, tensions are high across GUN and the presence of armed groups will likely continue to threaten civil security. Inter-communal conflict in Lakes State, and to a lesser extent, Warrap State, is also expected to escalate during the dry season and localized conflict in areas outside of GUN likely in the coming months due to increasing political instability country-wide. Fighting will likely subside with the onset of the 2015 rainy season in April/May, as it did last year, but levels of civil insecurity will nevertheless remain high.

Displacement: Conflict-related population displacement is expected to continue, particularly in GUN and Lakes State. Overall, FEWS NET assumes displacement will peak from January to April coinciding with expected escalation of conflict, potentially displacing an additional half-million people during this period.

Market functioning and staple food prices:

- Given reduced trader stocking, market stocks will likely be similar to or lower than last year.
- The informal SSP to USD exchange rate is likely to rise in the coming months due the macro-economic pressures. Further depreciation of the SSP will increase prices of imports and depress trade.
- FEWS NET assumes that staple food prices, already above-average in many places, will rise further due to a combination increasing prices of imported goods, high transportation costs, and disruptions in market supply chains. Below-average production and ongoing security-related disruptions to trade will likely exacerbate price shocks in Lakes and Warrap states.

Rainfall: FEWS NET assumes an on-time start to the April to November main rainy season. This assumption will be updated as seasonal forecasts become available.

Planting: FEWS NET assumes that area planted for the main 2015 agricultural season will be near average in most of the country. Area planted is likely to be below-average in Greater Upper Nile and in Lakes State due to the ongoing impact of conflict and displacement on livelihood activities.

Food and income sources: Above-average prices are expected to reduce household access to food, particularly during the May to July lean season when poor households are most market dependent. Assuming a normal beginning to the rainy season, food and income availability and access will improve in late July/August as green harvesting begins. Food and income sources will likely remain well below average in GUN and Lakes State due to conflict and displacement. Food consumption among poor households in Warrap and Northern Bahr el Ghazal is likely to be below-average due to production deficits and high food prices.

Livestock: Conflict in GUN and Lakes State is likely to continue to disrupt traditional livestock migration patterns both within and outside these states. In turn, movement of livestock from conflict to non-conflict areas is likely to disrupt the livelihood activities of both cattle herders and sedentary farmers encountered along migratory routes.

Humanitarian assistance: Deteriorating food security in areas outside of GUN will increase emergency food assistance needs in South Sudan this year. Humanitarian assistance delivery from January to June is likely to be better than last year due to improved transport access along the Sudan and Gambella corridors, stronger logistics capacity, increased humanitarian presence in conflict-affected areas, and improved prepositioning capacity during the dry season. However, insecurity and humanitarian access restrictions will likely continue to interrupt emergency assistance deliveries in GUN and Lakes, reducing prepositioning potential, especially in areas where heavy fighting occurs most frequently. Extended reliance on air operations is likely to impact delivery capacity during the rainy season from April to June. Because uncertainty about funding after June, humanitarian assistance was not considered in projected outcomes for July to September.

Nutrition and mortality : The prevalence of global acute malnutrition (GAM) is expected to rise country-wide in the coming months due to the seasonal increase that typically occurs during the May to July lean season, the increased burden of infectious diseases, and a decline in access to health services during the rainy season. GAM is likely to increase more than normal in Jonglei, Unity, and Upper Nile, Lakes and parts of Warrap states due to the expected deterioration in food security.

In addition to the national assumptions above, the following assumptions are specific to the **Greater Upper Nile region** from January to September:

Markets and trade:

- Market supply to GUN is expected to improve from January to March due to improved road accessibility enabling cross-border trade from Sudan and Ethiopia. However, trade flow is expected to remain well below pre-crisis levels—about 50 percent of normal—due to insecurity, foreign currency shortages, increased transport costs, and lower effective demand. Due to these factors, traders are expected to keep commodity stocks low and restocking will remain limited.
- Market functioning will likely improve from January to March, particularly in markets closer to key trade routes, but the number of traders and buyers will remain below-average. Staple foods will remain scarce in areas far away from transport corridors and/or ports. Staple food availability will decline from April to September during the rainy season due to seasonal deterioration in road access and low volumes of prepositioned trader stocks increasing cereal scarcity.
- Consumer demand will remain low in all three states compared to pre-crisis levels due to limited income among poor households and IDPs who will rely more heavily on non-market sources for food. As availability of these alternative food sources declines during the March to August lean season, demand for cereals is likely to rise. Bartering and sales of livestock for cereals will increase during this period.
- Prices are expected to behave seasonably—declining from January to March and increasing from April to September—but will remain volatile and well-above pre-crisis levels with high variation across markets. Prices in eastern parts of Jonglei and Upper Nile, and northern Upper Nile will be lower compared to central Jonglei and Unity due to increased supplies from Sudan and Ethiopia. Prices are expected to remain much higher in areas further away from transport corridors and/or ports. Cereal prices will be comparatively lower in areas receiving frequent humanitarian assistance due to increased availability and lower consumer demand.

Lean season: Limited income earning opportunities and early depletion of household food stocks from own production will lead to an early start to the lean season in March, two months earlier than normal.

Income sources: Overall, between January and September 2015 poor households and IDPs in Greater Upper Nile are likely to earn less income than usual. Assumptions related to specific income sources are provided below:

- Sale of grass, charcoal and firewood: Firewood and charcoal are typically a main source of income for poor households and normally collected during the dry season and sold during the rainy season. Poor households are therefore expected to gather firewood, grass, and prepare charcoal from January to April. However, conflict and insecurity will likely interrupt access to this activity. Access to the urban markets where demands are highest will also be limited. Thus, income from this source will be below normal.

- Sale of labor: Income from wage labor will remain largely unavailable in 2015.
- Sale of livestock: Households typically sell a limited number of livestock each year. However, ongoing conflict has limited normal livelihood activities. Households are expected to increase sales of livestock to fund food purchase starting in March and distress sales are likely to peak from May to July. Poor and very poor households with small herds are likely to deplete livestock assets over the course of the lean season.
- Sale of fish: January to April is an important period for fishing as fish availability is highest during this time of the year in most parts of Jonglei, Upper Nile, and Unity states. Since other income sources remain disrupted, poor and IDP households will increase reliance on fishing to compensate for loss of other income sources. Market disruption in rural areas will force households to travel farther than normal to markets where demands are higher like Bor or Akobo in Jonglei. Overall, poor households' fish catch is likely to increase seasonally from January to April, decline from May to June and increase again between July and September. Access to fishing grounds will be lower in areas that experience frequent fighting.

Food sources: Overall, between January and September 2015 poor households and IDPs are likely to consume less food than usual. Assumptions related to specific food sources are provided below:

- Own produced cereals: Unlike in a typical year, when household production lasts between four to seven months (depending on the livelihood zone), poor households exhausted their food stocks as early as December/January across much of Unity and Jonglei states. In Upper Nile, stocks will last until early February due to relatively better harvests.
- Food purchases: Poor households typically increase reliance on markets for food during the lean season. This year, households have already begun to depend on markets for cereals. Increasing reliance on markets for food is expected from now through July, when non-market food sources become available. Market dependence will likely peak from April to June when food availability from other sources is lowest.
- Livestock and livestock products: Milk and blood availability will decline seasonably from February to April/ May as livestock migrate to dry season grazing areas and increase when livestock returned to homesteads in June. Above-average livestock slaughter and consumption is expected to begin in March. Although precise estimates of livestock holdings by wealth group are unavailable, historical literature and qualitative estimates suggest that an estimated 20 percent of very poor households have little or no livestock holdings. These households, in addition to IDPs without access to herds, will rely on kinship for access to livestock products.
- Kinship support: Kinship support and sharing will remain a main source of food for IDPs and the very poor from January to September, although quantities will decline during the lean season as food access declines.
- Fishing and hunting: Poor and IDP households will increase reliance on fish as a primary source of food from January to April. Access to fish will decline seasonally from May to June and increase again from July to September. Fishing equipment remains scarce in many counties. Hunting, typically a dry season activity in Jonglei and Upper Nile will likely increase compared to normal.
- Wild Foods: *Lalob/desert date* (*Balanites spp*), and *Nabag* (*Ziziphus spp*), and *Dolieb* (palm), and water lily: Poor households normally consume wild foods, roots, and leaves as a main source of food. Like last year, above-average consumption and reliance on wild foods as a primary source of food is likely. Households will increase consumption of desert dates and water lily when they are available from January to April and switch to other leafy wild foods will be available during the rainy season. Above-average water levels in central/southern Unity state are likely to delay access to water lily seeds and roots in especially in Leer and Panyijiar counties until end of January/February. Expansion of wild food collection will likely be limited by insecurity in frontline areas.

Humanitarian assistance:

- Overall, prepositioning of food aid commodities is likely to improve compared to last year. Better overland access into and across Greater Upper Nile, stronger logistics capacity, and increased humanitarian presence in conflict-affected areas is expected to facilitate prepositioning in advance of the rainy season. However, insecurity and restrictions to humanitarian access are likely to restrict deliveries and prepositioning in worst-off areas, particularly those near corridors prone to fighting.

- In 2014, emergency food assistance delivery varied across counties in GUN. Logistical and humanitarian access constraints and heavy dependence on air operations impacted delivery capacity. In many counties, food aid deliveries were sporadic and several counties in GUN received little or no assistance. An assessment of food aid delivery trends over the course of 2014, current progress of stock prepositioning and continued constraints to humanitarian access suggests that in the most likely scenario, the impact of food aid deliveries is likely to impact outcomes significantly enough to change the IPC classification in the following counties between January and June: Panyijiar, Leer, Koch, Mayendit, and Rubkona in Unity State, Twic East, Akobo, and Nyirol counties in Jonglei, and Fashoda and Melut in Upper Nile.

Nutrition and mortality: GAM is likely to increase and reach critical and emergency levels in many areas of GUN from April to June, due to persistent food consumption gaps, and limited access to health and nutrition services. The prevalence of GAM will likely be highest in areas most impacted by the conflict, and where humanitarian assistance is limited. The number of non-violent deaths is expected to rise in GUN from April to June and elevated levels of mortality are likely in worst-off areas.

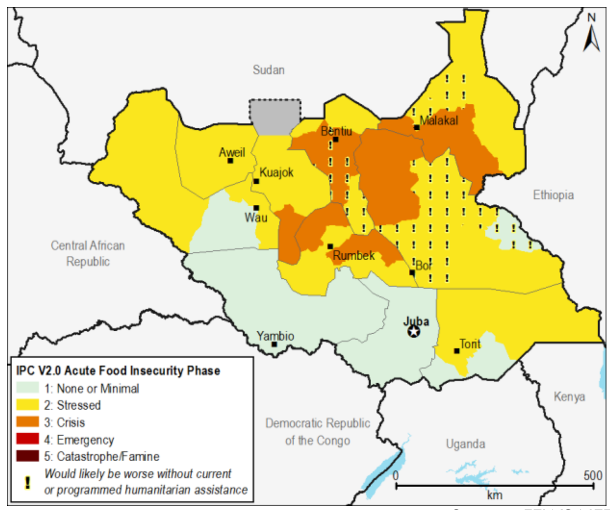
Most Likely Food Security Outcomes

January to March 2015: The South Sudan IPC estimated that 2.5 million people will face Crisis (IPC Phase 3) and Emergency (IPC Phase 4) across the country by March. This figure is in-line with FEWS NET's analysis which expects that: In GUN, increased consumption of seasonal food sources like wild foods and fish will not offset the effects of early stock depletion, and many poor and IDP households will face gaps in their ability to meet food needs. An increasing number of households will face Crisis (IPC Phase 3) in Jonglei, Unity, and Upper Nile states, although the presence of humanitarian assistance will improve food security outcomes to Stressed (IPC Phase 2!) in a number of counties. Food security will expand to Lakes and Warrap states where a deterioration to Crisis (IPC Phase 3) is expected in four counties in Lakes and one county in Warrap.

April to June 2015: Food insecurity is expected to worsen country-wide as food availability and access decline and the lean season peaks. In areas of GUN most affected by conflict, significant consumption gaps are likely, despite high levels of coping among IDP and poor host community households, causing elevated levels of acute malnutrition. Even with emergency assistance, large portions of the population in GUN will face Crisis (IPC Phase 3) and deterioration to Emergency (IPC Phase 4) is expected in areas where conflict is likely to limit humanitarian aid. Crisis (IPC Phase 3) is also to extend to large areas of Warrap and Lakes states during this period. **Needs will peak between May and June when FEWS NET estimates that more than 3.5 million people, one third of the total national population will require emergency assistance (IPC Phase 3 and higher).**

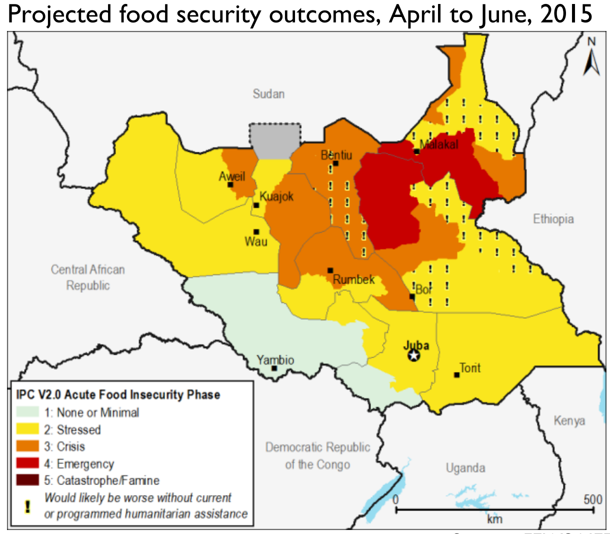
July to September 2015: Food availability will begin to improve in many areas in July/August as green harvests, fish, and wild foods become available, even in the absence of humanitarian assistance. However, conflict and insecurity will continue to restrict food access in Rubkona (Unity), and across central Jonglei

Projected food security outcomes, January to March, 2015



Source: *FEWS NET*

Projected food security outcomes, April to June, 2015



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and southern Upper Nile where poor and IDP households are likely to remain in Crisis (IPC Phase 3) and Emergency (IPC Phase 4).

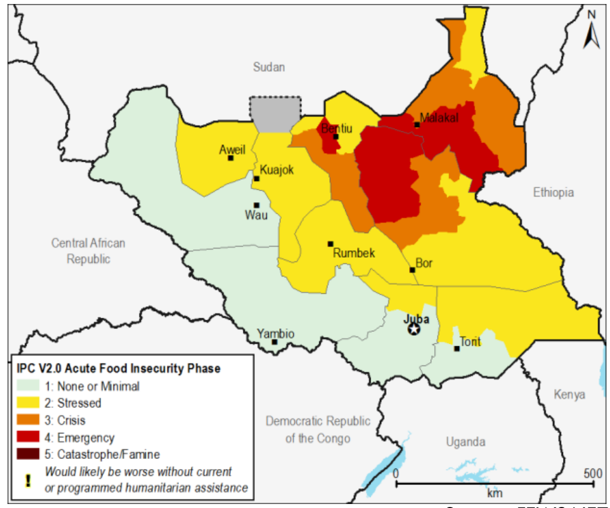
Areas of Concern

UNITY STATE: Panyijiar, Leer, Mayendit, Koch, Guit and Mayom counties

Current Situation

Large populations in Panyijiar, Leer, Mayendit, Koch, Guit and Mayom counties remain displaced following the repeated outbreaks of fighting in 2014. Tensions are still high and armed clashes continue in Rubkona and the surrounding areas. Over 345,000 people remain displaced in Unity, with more than two-thirds of the displaced currently living in the counties of concern listed above. Displacement due to conflict has interrupted livelihoods, constraining access to food and income. Although some IDPs managed to cultivate during the 2014 agricultural season, a significant majority did not. IDPs also lost assets or have been separated from their livestock.

Projected food security outcomes July to September 2015



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Overall, crop production was well below average in the worst affected counties of Unity State. In July 2014, a FEWS NET analysis of high resolution satellite imagery showed that the area cultivated by households around Tharker in Mayendit County had reduced by 30 percent compared to 2012, a relatively normal year. This finding was consistent with ground reports from other conflict-affected areas of Unity State. In addition, the November 2014 FSNMS found that in Unity, 34 percent of households did not plant and that, on average, households harvested cereals equivalent to only 1.2 months of consumption.

The November 2014 FSNMS also found that, in Unity State, 14 percent of households used “high coping” according to the Reduced Coping Strategies Index, 35 percent had depleted assets, 61 percent had experienced moderate hunger in the past 30 days according to the Household Hunger Scale, and 53 percent had borderline or poor food consumption according to the Food Consumption Score. While the data from the FSMS is only available at the state level, these findings are broadly consistent with an area classification of Crisis (IPC Phase 3).

Since then, conflict levels have been lower than expected and market functioning has started to improve, though cereal supplies on local markets remain lower than usual due to the closure of trade routes from the state capital (Bentiu) and neighboring states due to insecurity. Although prices are lower than 2014, the cost of cereals remains high. For instance, a 50 kilogram (kg) bag of red sorghum costs SSP 300 to 600 in Panyijiar, Leer, Mayendit and Koch depending on the distance of the market from the ports of Tayar in Panyijiar and Adok in Leer or from other supply markets in Duk Padiet in Jonglei, and Rumbek East and Yirol East in Lakes state. The same quantity sold at SSP 700 during the peak of the fighting in May 2014.

As of January, poor household cereal stocks have been consumed. In addition, milk availability is declining normally as livestock are starting to migrate to dry season grazing areas. As a result, poor households have begun increased collection and consumption of wild foods and fish. Although these counties typically face cereal production deficits, this year’s deficit is significant enough that even with these other food sources, household still face some gaps in their ability to meet food needs. While markets are functioning better than last year, household purchasing power is weak due to reduced and/or unavailable income. However, in many counties the delivery of humanitarian assistance has improved since mid-2014 due to reduced conflict, the opening of key transport corridors, and the drying-out of roads. This assistance has likely played an important role in meeting remaining food needs in a number of counties including Panyijiar, Leer, and Rubkona. FEWS NET assumes that aid deliveries have been smaller in Guit, Koch, and Mayendit due to continued access issues.

Therefore, FEWS NET estimates that as of January, poor local households and IDPs in Panyijiar, Leer, Guit, and Mayom counties are able to meet basic food requirements due to a combination of wild foods, fishing, kinship support, market purchase and food aid, though they remain unable to afford key non-food expenditures. Outcomes are relatively better in Guit and Mayom counties due to better market access, and are currently Stressed (IPC Phase 2). Panyijiar and Leer are also Stressed, but only due to the positive impact of food assistance (IPC Phase 2!). Koch and Mayendit, where food availability and assistance deliveries have been lower are classified as Crisis (IPC Phase 3). Humanitarian assistance has prevented deterioration to Emergency (IPC Phase 4) in Rubkona, currently in Crisis (IPC Phase 3!).

Most Likely Food Security Outcomes

Between January and March, households will continue to depend on a combination of fishing, wild foods, kinship support and market purchases for food. However, continued sharing between IDP and host community households is likely to overstretch resources. A growing number of households will become unable to meet minimum food needs causing a deterioration to Crisis (IPC Phase 3) in Mayom and Guit. Conditions will also worsen in Koch, and Mayendit, but increased humanitarian aid will maintain Crisis outcomes (IPC Phase 3!) during this period. Outcomes in Rubkona, Panyijiar, and Leer are expected to remain generally similar to those currently observed, due to the presence of humanitarian assistance.

Between April and June, food availability and market access will decline as the lean season progresses. Ongoing humanitarian assistance is expected to mitigate Emergency (IPC Phase 4) in Panyijiar, Leer, Koch, Mayendit, and Rubkona. Outcomes will deteriorate to Crisis (IPC Phase 3) in Pariang and Abiemnhom. Mayom will also remain in Crisis (IPC Phase 3).

Between July and September, food availability will improve with green harvests and other seasonal food sources, but households will remain unable to meet minimum food requirements and poor and IDP households will face Crisis (IPC Phase 3), except in Rubkona, which is expected to remain in Emergency (IPC Phase 4), in the absence of humanitarian assistance. Pariang, Guit, and Abiemnhom are expected to improve from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) between July and September.

JONGLEI STATE: **Duk, Ayod, Fangak, Canal, Uror, and Nyirol counties**

Current Situation

Tensions remain high in much of Jonglei State, with intermittent clashes continuing to occur. In December 2014, fighting erupted in Fangak County forcing an estimated 43,200 people to flee for safety. This includes an estimated 25,000 newly displaced people from New Fangak and Canal. Duk, Ayod, Fangak, Canal, Uror, and Nyirol counties host about 72 percent of the 621,600 IDPs in Jonglei state. Given its relative stability, Nyirol County hosted the largest displaced population, with 184,380 IDPs as of January 22, 2015 according to OCHA. An assessment conducted by Solidarites International in November reports that 25,000 IDPs were stranded near Kuernyang, unable to reach Old Fangak due to seasonal flooding.

In Duk and Ayod, the two counties worst affected by conflict, up to 70 to 80 percent of households did not cultivate during the 2014 season. Meanwhile in Uror, Nyirol and Canal the proportion of households that did not cultivate was estimated at roughly 30 percent. Planting was better in Fangak. On average, the November 2014 FSNMS estimates that 55 percent of households in Jonglei did not plant. For areas that were planted, favorable rainfall throughout the growing season resulted in good yields. This is particularly true for Fangak where the harvest was slightly better than average. However, given the reduced area planted, and sharing with IDPs, household food stocks were depleted by December. In Duk and Ayod the few crops planted were consumed while still green and households began relying on alternative food sources even during the harvest period.

The November 2014 FSNMS also found that, in Jonglei State, 18 percent of households used “high coping” according to the Reduced Coping Strategies Index (1 percent used “severe coping”), 30 percent had depleted assets, 57 percent had experienced moderate hunger in the past 30 days according to the Household Hunger Scale (3 percent severe), and 57 percent had borderline or poor food consumption according to the Food Consumption Score. While the data from the FSNMS is only available at the state level, these findings are broadly consistent with an area classification of Crisis (IPC Phase 3) and the possibility of some localized Emergency (IPC Phase 4) during November 2014.

Markets in Jonglei are slowly starting to recover, particularly in more stable areas, but grain supplies remain limited. Road accessibility from Bor through Twic East to Duk and Ayod is gradually starting to improve. Movement from Akobo East to Nyirol and Uror remains limited to light four-wheel-drive vehicles. As a result, despite increased availability of supplies from Ethiopia in Akobo, trade flow to counties further in the interior remains limited and traders are charging high prices in these areas. Conversely, anecdotal information indicates below-average livestock prices in rural markets. Travel to traditional livestock markets in Bor and Akobo, where prices are higher, is also restricted due to poor infrastructure. In December the price of a medium size bull was SSP 2,500 in Twic East, which is accessible to Bor by road, but costs only SSP 1,000 on average in Uror, Nyirol and Akobo counties.

Household in worst-affected areas are currently relying on fish, wild foods, and food aid for food. In particular, fish availability has improved in Duk, Ayod, Fangak and Canal counties. Displacement during 2014 did result in the loss of assets, including fishing gear though the distribution of more than 50,000 fishing kits by FAO to the affected community has helped alleviate the shortages of fishing equipment among IDPs and poor residents. Nearly 70 percent of these kits went to the worst-affected counties. Humanitarian assistance has improved in recent months. In December, general food distributions under EMOP operations reached 210,000 beneficiaries in Akobo, Ayod, Bor South, Duk, and Twic East counties with 2,800 metric tons (MT) of food. This represents a considerable improvement in scope and coverage from November—beneficiary coverage under EMOP GFD increased by 15 percent in conflict-affected counties. This food aid enabled the worst-off households to mitigate cereal shortages and food consumption gaps.

Poor and IDP households in Canal, Fangak, Ayod, and Duk are currently unable to meet minimum food needs due to early depletion of household food stocks, constrained supplies of cereals on markets, and little or no income opportunities. Fighting in these frontline areas has limited the capacity of households to expand fishing and wilds foods collection in response to food shortages, and despite improved road accessibility to these areas in recent months, insecurity continues to limit humanitarian access. These counties are currently in Crisis (IPC Phase 3). Outcomes are better in Nyirol, Akobo, Uror, Twic East and Bor South due to relatively better market functioning and access in these areas, as well as humanitarian assistance delivery. In these counties, poor and IDP households are able to meet minimum food needs with humanitarian assistance and face Stressed (IPC Phase 2!).

Most Likely Food Security Outcomes

The lean season is expected to begin as early as February in counties of concern as a result of early depletion of household food stocks, and reduced access to food and income due to insecurity. IDP and poor host community households in Duk, Ayod, Canal, and Fangak will remain unable to meet food needs and Crisis (IPC Phase 3) is likely to persist in these counties through March. Ongoing humanitarian assistance delivery in Bor South, Twic East, Nyirol, Uror, and Akobo will continue to enable the worst-off households to offset food shortages and prevent deterioration to Crisis. These counties will remain Stressed (IPC Phase 2!).

Between April and June, acute food insecurity is likely to reach Emergency (IPC Phase 4) In Duk, Ayod, Fangak, and Canal due to significant food consumption deficits among poor and IDP households, despite very high levels of coping, and limited humanitarian assistance. Food security outcomes in Uror and Twic East counties are expected to deteriorate to Crisis (IPC Phase 3) due to an anticipated decline in accessibility to these areas and a likely reduction in humanitarian assistance. Other counties of concern will remain Stressed, but only with the presence of humanitarian assistance (IPC Phase 2!).

Like in Unity, increased food availability will ease consumption deficits from July to September improving food security outcomes in Jonglei, except in Duk, Ayod, Fangak, Canal counties which are likely to remain in Emergency (IPC Phase 4) and in Uror and Nyirol where poor and IDP households will continue to face Crisis (IPC Phase 3) food security outcomes.

UPPER NILE STATE: **Nasir, Ulang, Baliet, Longochuk and Panyikang counties**

Current Situation

As in Unity and Jonglei, crop harvests in much of Upper Nile declined compared to last year due to reduced cultivation caused by conflict and displacement. Overall, qualitative estimates suggest a large variation in crop production across counties with production deficits ranging from 20 to 70 percent across the state. Deficits are highest in Ulang and Nasir where production declined by two thirds, and in Baliet and Panyikang where production declined by half compared to last year. Production in Longochuk was better, with estimated deficits of 20 percent. The November 2014 FSNMS found that overall, 64 percent of households did not plant last year IDP and poor host community households are currently relying on food aid, limited household food stocks and wild foods gathering to meet food needs.

Market functioning remains limited in most counties, although improved road access since December has enabled increased staple food commodity trade flows to rural markets. Production surpluses from Renk and Melut to Malakal and Fashoda, Baliet, and Panyikang counties has led to slight price declines in these areas. Traders from Kosti, Sudan, have also begun to return to Baliet and Panyikang markets, although in small numbers. Trade flows from Ethiopia to Maiwut and Nasir have also improved, supplying markets in Nasir and Ulang. However, despite increased market activity, prices in counties of concern remain 20 to 50 percent higher than pre-crisis levels and market conditions remain fragile due to persistent insecurity, particularly in frontline areas. Consequently, prices of staples nearly doubled due to cereal shortfalls and limited market functioning and trade routes as commodities moved from the northern to southern counties. For example, in Melut (north) and Malakal (south), white sorghum prices were SSP 1.8 per kilogram and SSP 4.2 per kilogram pre-crisis and are currently trading at SSP 3.4 and SSP 6.2 per kilogram, respectively, due to transportation costs and high risks.

Livestock body conditions have begun to decline which is typical this time of year, and migration to dry season grazing areas has begun in most areas. Livestock body conditions are better in Ulang and Nasir, due to the availability of flood recess water and pasture. Above-average flooding in these areas has delayed seasonal migration to low-land grazing areas until February, improving milk and meat availability.

Findings from the November 2014 FSNMS suggest that in Upper Nile State, 18 percent of households used “high coping” according to the Reduced Coping Strategies Index (2 percent used “severe” coping), 62 percent had experienced moderate hunger in the past 30 days according to the Household Hunger Scale (4 percent severe), and 40 percent had borderline or poor food consumption according to the Food Consumption Score. While the data from the FSMS is only available at the state level, these findings are broadly consistent with an area classification of Crisis (IPC Phase 3) and the possibility of some localized Emergency (IPC Phase 4) during November 2014.

Food assistance delivery improved significantly from November to December reaching a total of 127,000 beneficiaries in Akoka (Baliet), Fashoda, Malakal, Manyo, and Melut counties with 2,000 MT of food.

While earlier analysis suggested a deterioration to Phase 4 from January to March in Nasir, Ulang, and Baliet counties, monitoring data indicate better than expected current conditions including conflict intensity, market functioning, and harvests in some areas. Nevertheless, poor and IDP households are currently not meeting food needs and remain in Crisis (IPC Phase 3). Fashoda and Melut are currently Stressed, but only due to humanitarian assistance which is enabling poor and IDP households to cover food gaps (IPC Phase 2!). Outcomes are better in Maiwut, Longochuk, and Maban due to better access to markets and households currently face Stressed (IPC Phase 2).

Most Likely Food Security Outcomes

In general, food security outcomes in Upper Nile from January to March will be better compared to Unity and Jonglei due to better production and overall food availability and supply as well as access to markets, particularly in eastern Upper Nile. Maiwut, Longochuk, Maban, and Renk, and Manyo counties will be Stressed (IPC Phase 2). Poor and IDP households in Melut and Fashoda will meet minimum food needs, but only with humanitarian assistance and will likely not be able to meet essential non-food need and face Stressed (IPC Phase 2!). Outcomes will be worst in Nasir, Ulang, and Baliet where food access is expected to remain constrained and these counties will remain in Crisis (IPC Phase 3).

From April to June, food security will deteriorate across Upper Nile as the lean season peaks. Outcomes will deteriorate to Emergency (IPC Phase 4) in Baliet, Nasir, and Ulang as food consumption gaps widen and conflict continues to limit humanitarian assistance.

As in Unity and Jonglei, outcomes will improve in most counties from July to September as green harvests and fish become available, except in Baliet, Nasir, and Ulang, where Emergency (IPC Phase 4) will persist due to expectations of limited or no cultivation in these areas.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1: Possible events over the next nine months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National/ Greater Upper Nile	An effective peace agreement leads to a significant reduction and/or complete cessation of hostilities	A substantial reduction in fighting and/or an end to conflict would improve food security conditions and humanitarian access and food security outcomes would likely not deteriorate to Emergency (IPC Phase 4).
National/ Greater Upper Nile/Lakes	Intensification of conflict	Conversely, a significant escalation in conflict would likely cause a faster deterioration in outcomes and food insecurity would likely be more severe than expected. Increased conflict would also limit humanitarian assistance delivery. If this were to occur, Emergency (IPC Phase 4) would be more widespread and the likelihood of Famine (IPC Phase 5) would increase. Should large-scale conflict spread to states that are currently considered stable, the size of the food insecure population would be much larger than currently estimated and emergency humanitarian assistance needs would increase significantly.
National	Major macroeconomic shock due to a balance of payments crisis or exhaustion of foreign currency reserves	▪ Total depletion of foreign reserves could effectively stop imports, significantly reducing the availability of both staple food and other commodities, such as fuel. ▪ Markets in interior states would become increasingly isolated. ▪ Government salaries would not be paid, reducing cash flow and effective market demand. ▪ Non-payment of salaries would contribute to widespread political unrest and increase the likelihood of conflict spreading outside of Greater Upper Nile.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario.