SOUTH SUDAN Food Security Outlook October 2008 - March 2009

- Preliminary findings of the recently completed Crop and Food Supply Assessment Mission (CFSAM) indicate that the 2008 rainfall season performed better than last year. However, a number of areas are at at-risk of above-normal, late, or un-seasonal flooding.

- Mabaan County is highly food insecure following un-seasonal flooding starting early October. The flooding has killed 31 people during the last week, destroyed assets and crops, and left 7,500 people homeless. A Government led inter-agency emergency assessment is currently ongoing to enable a rapid, multi-sectoral response.

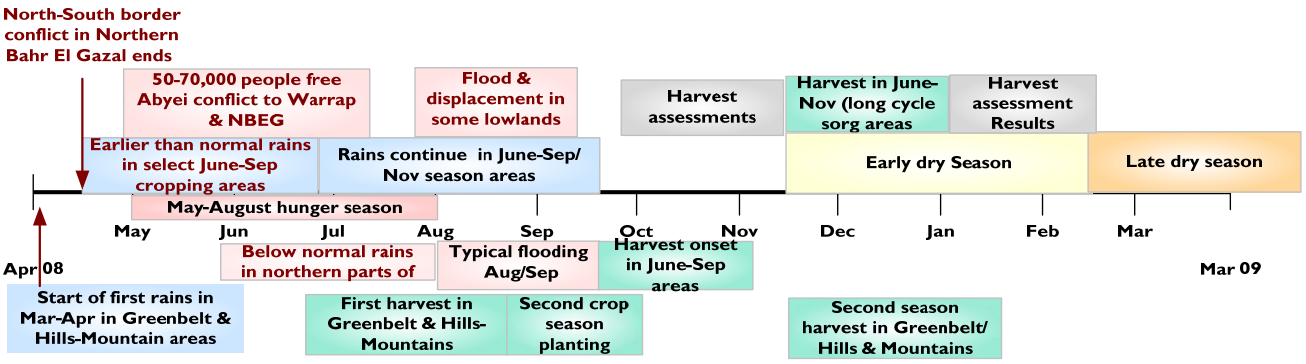
- Despite this year's improved crop performance, moderate food insecurity is likely during January-March 2009 in Aweil East, Aweil West, Aweil North, Nyirol, Waat, Nyiror, Wuror, Diror, Akobo,Wanding. Maiwut, Luakpiny, and Ulang. In addition, food security conditions are likely to deteriorate further in Gogrial, Twic and Mabaan counties, partly due to the ongoing impact of recent conflict and flooding which exacerbate chronic food insecurity.

- The worst-case food security scenario would be triggered by increased cattle raiding and inter-clan conflicts, above normal population returns, and premature food shortages. These would exacerbate chronic food deficits between January and March 2009 in Aweil East, Aweil West, and Aweil North, Gogrial, Twic, Nyirol, Waat, Nyiror, Wuror, Diror, Akobo, Wanding, Maiwut, Luakpiny,Ulang, Magwi, Torit and Kajokeji counties.

Figure 1. Estimated current food security conditions, October 2008 – December 2008

Source: FEWS NET

Seasonal calendar and critical events



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Current food security conditions food security scenario (October-December 2008)

Current food security conditions are good following a fairly successful cropping season in southern Sudan. However, informal sources suggest poor performance in select locations (Nyirol, Waat, Nyiror, Wuror, Diror, and possibly Akobo and Wanding) where a June-July dry spell destroyed crops during germination and flooding followed replanting. This could result in some households being moderately food insecure before the end of this year (Figure1). In Gogrial county, inter clan conflict and displacement that took place during this year's cultivation season led to some households not cultivating. Particulalrly affected are the chronically food insecure, the labor poor, and poor crop-producing households. Finally, Mabaan County has become highly food insecure (Figure 1) as of early October, following severe crop and asset losses caused by widespread and un-seasonal flooding which occurred when surrounding rivers burst their banks due to heavy rains in Sudan and Ethiopia (Figures 1 and 4). Initial estimates suggest that this flooding has affected 7,500 households (45,000 people), believed to represent 30 percent of the county's total population. While preparations for multi-sectoral humanitarian assistance are ongoing, significant recovery is unlikely to occur until next year's October harvest.

Performance of the main June-September rains

CFSAM findings have confirmed a timely start and good performance of the March-May 2008 rains. This resulted in a fair-to-good first season crop harvest that concluded in August-September, and overlapped with second season crop planting. Second season crops will be harvested starting December and are currently progressing well. The March-May rains are most relevant to the Greenbelt livelihood zone, the Hills and Mountains livelihood zone, and to some extent, southern parts of the Pastoral livelihood zone.

Elsewhere, the performance of the main June-September cropping season was mixed, but somewhat better than last year. These rains began on time, but declined significantly in volume between mid-June and July/August, especially in the North-Eastern parts (Figure 3). June through August is the most crucial time for crop growth. Therefore, dry spells during this period necessitated replanting and in some cases these areas were later affected by flooding, resulting in mixed crop performance.

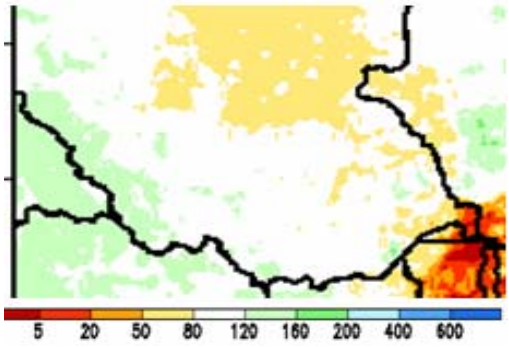
Figure 4 illustrates areas at moderate risk of excess rainfall induced flooding, including Mabaan County, other areas along the Sudan-Ethiopia border, Nile River basin and surrounding areas. Field updates from the end of October for Cuiebet, central parts of Bor county (Baidit area), and parts of Aweil County, indicate increased late season flooding, consistent with conditions suggested by Figure 4. However, current National Oceanic and Atmospheric Administration (NOAA) precipitation forecasts suggest reduced rainfall for the first week of November, implying a reduced risk of additional flooding.

Current livestock and pasture conditions are reportedly good in most locations, implying that normal animal movements and pasture access will occur during the coming January-April dry season. However, there is potential for insecurity in areas prone to dry season cattle-based conflict

Figure 2. Livelihood zones in southern Sudan

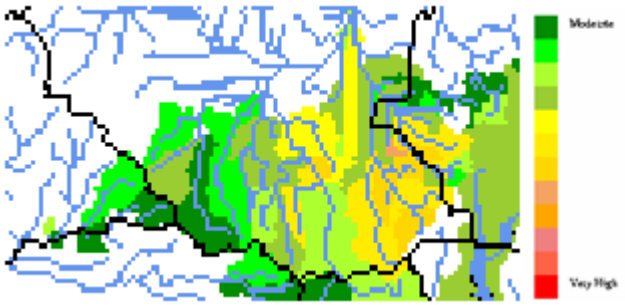
Source: FEWS NET

Figure 3. Percent of normal rainfall June 1- August 21, 2008



Source: NOAA

Figure 4. Basin Excess Rainfall as of 31, October 2008



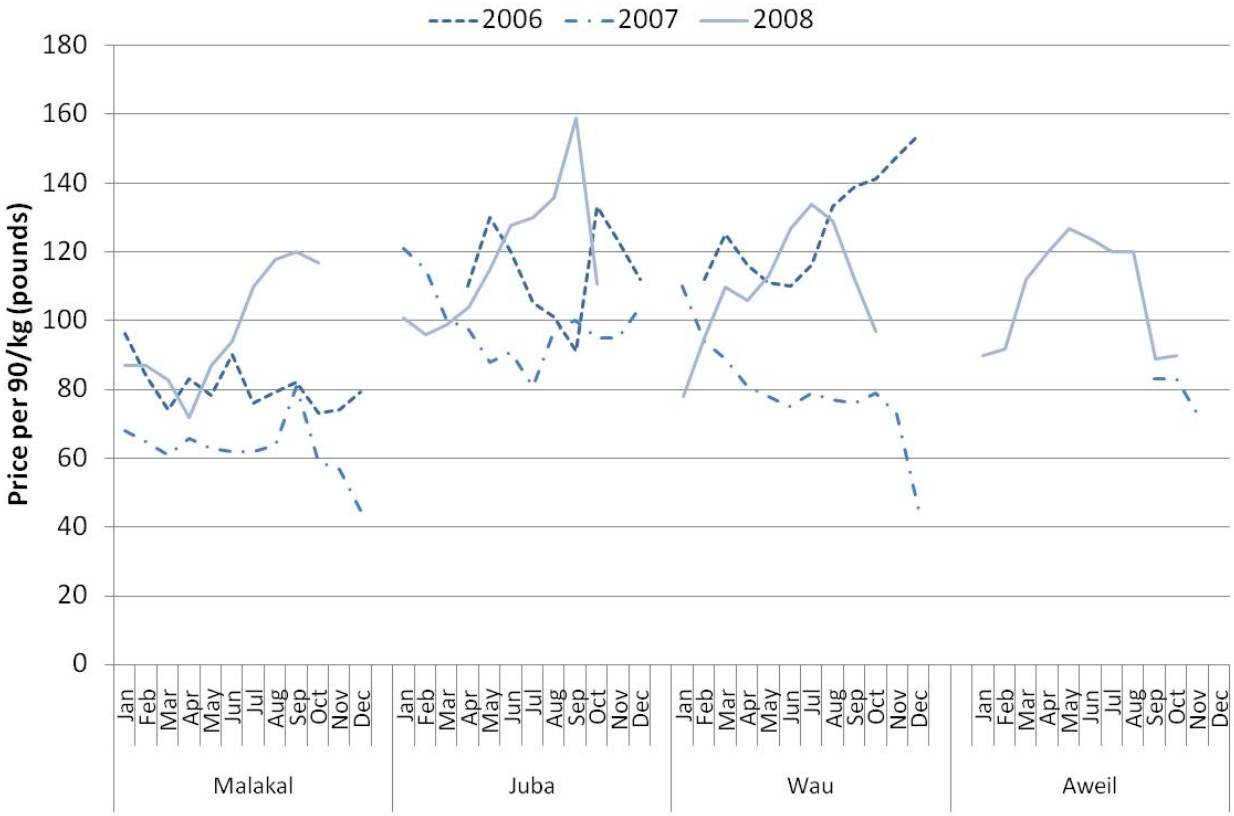
Sources: USGS –EROS Data Center

and in Magwi County, which has experienced un-seasonal cattle movements from Bor County since May this year.

Markets, food prices and food access

Sorghum prices began declining in July when early crops matured. However, this decline became more evident starting in early September when the main September-October crop harvests, comprising of sorghum, maize and groundnuts (Figure 5), became available. In terms of specific areas, price reductions started in July in Wau where an earlier than normal harvest of early maturing crops occurred due an early onset of rains and a successful growing season. This was soon followed by reductions in Aweil in August. Price reductions in Juba were not evident until September when the first season sorghum harvest became readily available in the market. Reductions in Malakal became more evident in October when crops matured for early consumption. Typically, crops around Malakal market mature in August, but they were delayed this year due to a prolonged dry spell during June-July.

Figure 5. Price of sorghum in key markets by mid-October



Source: WFP Graphics: FEWS NET

Despite these declines, current prices in all markets are still much higher than in 2007 during the same period. The price gaps are most pronounced in Malakal and Wau markets which are located near areas of significant crop production. However, further price drops are expected during November-December when long cycle sorghum is harvested in areas surrounding Wau, Malakal, and Juba markets.

There is a strong possibility that government subsidized sorghum will be made available by March next year, mitigating premature food shortages across much of southern Sudan. The subsidy program started in 2006, but essential data on the quantity of subsidized food being sold and the size of target populations has not been available, making it difficult to do a comprehensive analysis of program effectiveness. However, informal discussions at the household level have consistently

suggested that the contribution of subsidized sorghum to household food stocks has been significant, implying that quantity available may have been substantial. A more detailed analysis is critical in understanding the magnitude of impact that the program might have on consumers and farmers if continued for a longer period.

Most likely food security scenario (January – March 2009)

Food insecurity in counties of Aweil East, Aweil West, Aweil North, Gogrial, Twic, Nyirol, Waat, Nyiror, Wuror, Diror (Figure 6) is rooted in structural or chronic production problems. In the most likely scenario, during January-March 2009, food security is likely to deteriorate in all Aweil counties following the negative impact of premature July-August flooding on lowland crops in all Aweil counties combined with increased population returns. As a result, the exhaustion of household food stocks, that typically occurs beginning around April-May, will likely happen earlier in 2009

Similar conditions are anticipated in Twic County, primarily due to the Abyei conflict in May of this year. Twic County traditionally relies on Abyei for grain, but the Abyei conflict displaced an estimated 50,000 people into neighboring Aweil counties and Warrap State, and disrupted cultivation. In turn, this will reduce grain flows from Abtei into Twic. Also, late flooding in the second season cropping areas of Ajakwac and Aweng during October might compromise the success of the second season harvest, crops which are essential in mitigating food insecurity in Twic.

Also in this scenario, conditions could worsen in select parts of Gogrial County where inter-clan conflict has escalated and disrupted this year's cultivation season, displacing about 30,000 people.

The negative impact of a prolonged June-July dry spell on crop harvests will become more evident during January-March 2009 in Nyirol, Waat, Nyiror, Wuror, Diror, Akobo, Wanding, Maiwut, Luakpiny, Ulang and Mabaan counties. Though August-September flooding might be favorable for a recessional maize/sorghum crop in select areas of Nyirol, Wanding, Maiwut, Luakpiny, and Ulang that could partly compensate for losses caused by the dry spell, the success of this crop is sometimes erratic. Increased access to game meat might be another option for offsetting cereal production shortfalls, but its utility is uncertain due to increased restrictions on hunting wild animals.

Table 1. Scenario indicators and triggers for the most likely and worst-case food security scenarios, (January 2008 – March 2009)

Most likely scenario

- Food insecurity due to the negative impact of poor crop performance in select areas exacerbated by chronic food deficits and high population returns, particularly in the Western Flood Plains.
- Food insecurity associated with persistent inter tribal/ethnic and armed cattle raiding conflicts often prevalent during dry season (January-April)
- Earlier than normal dry season food shortages arising from reduced crop yields caused by prolonged June-July dryness

Worst-case scenario

- Dry season livelihood conflict between nomads and agro-pastoralists along the north - south Sudan border, combined with above normal population returns and chronic food deficits particularly in the northern parts of the Western Flood Plains.
- Tribal-Livelihood-resource based conflict in the Hills and Mountains (Magwi County)
- Above-average conflict, especially in select areas of the Eastern Flood Plains, exacerbated by 2008 crop shortfalls, extremely high sorghum prices or lack of access to grain due market isolation, and restricted access to wild game.
- Increased activity by armed groups, especially Uganda's Lords Resistance Army (LRA) in the Hills and Mountains and the Greenbelt zones.

The dry spell also affected other areas (e.g., Tonga, Fashoda, Old Fangak, Ayod, Koch, and Leer) but these areas have better access to markets and other reliable off farm food sources, such as wild plants and fish, that will enable them to cope until March 2009

Worst-case food security scenario (January – March 2009)

In the worst case scenario (Figure 7), a combination of prolonged dry season conflict between Misseriya nomads and populations residing along the North-south Sudan border, and unusually high population returns from northern parts of Sudan, could trigger high food insecurity, especially in Aweil East, Aweil North, Aweil South and Twic counties.

A combination of excessive dry season inter-clan cattle raiding conflict, crop harvest shortfalls caused by June-July dryness, and persistent market performance problems could occur in Nyirol, Waat, Nyiror, Wuror, and Diror counties, and to some extent Maiwut, Luakpiny, and Ulang counties. Poor access to markets is a major constraint in these locations and high grain prices persist, often 50-100 percent above other markets, mostly due to persistent conflict, market isolation, and nonexistent road infrastructure.

The continued return of original populations (who left in the early 1990's) from northern Uganda to Magwi County, where their land is occupied by long settled Dinka displaced from Bor County, might trigger a livelihood conflict between the displaced population and their indigenous/returning hosts. In addition, another group of Dinka from Bor have reportedly moved into the county with large numbers of livestock. This might cause a livelihood conflict between the cattle owners and their agricultural hosts.

A resurgence of long standing insecurity associated with armed groups, especially Uganda's Lord's resistance Army (LRA), in Torit, Kajokeji, Magwi, and southern parts of Ezo, Yambio, Maridi and Yei counties (highlighted LRA in figure 7) could lead to worsening food security conditions even in the latter counties which produce grain surpluses because attacks often involve looting and burning of food stocks and displacement of households. The latest LRA attacks occurred on 1st November in the Democratic Republic of Congo's Dungu Town, near the Sudan/Congo border, killing 9 people and displacing an estimated 50,000. LRA remains active in northern Uganda, southern Sudan, Central African Republic, and Congo.

Overall, the worst case conditions are most likely to occur in Magwi County, due to increasing tensions over land, and in inter clan/cattle raiding conflict-prone areas of Tonj, Rumbek, Cueibet, Yirol, Nyirol, Waat, Nyiror, Wuror, Diror and Bor. Given historical trends, conflicts alone have to be excessive and prolonged to have an extremely high negative impact on food security. However, conflict in Magwi County could be particularly devastating due to the presence of a large displaced group which outnumbers the host community.

Figure 6. Estimated most likely food security conditions, January – March 2009

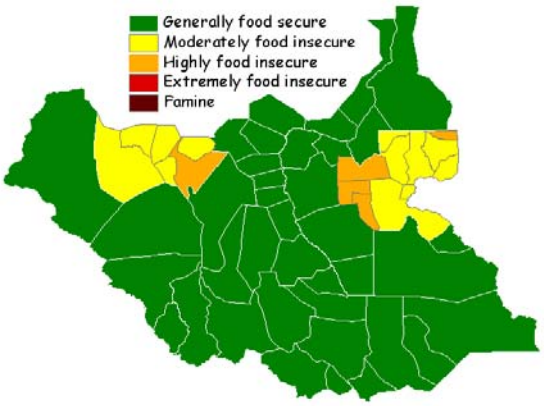
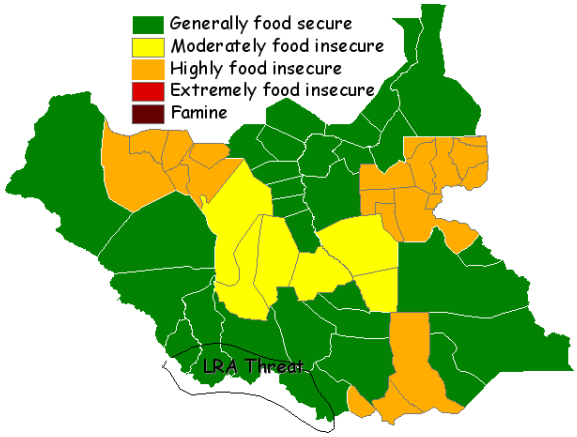


Figure 7. Estimated worst-case food security conditions, January – March 2009



Source: FEWS NET