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FAMINE EARLY WARNING SYSTEMS NETWORK

SUDAN Food Security Outlook Update — August 2021

Increased Intercommunal clashes, flooding, and high food prices continue to drive high needs

KEY MESSAGES

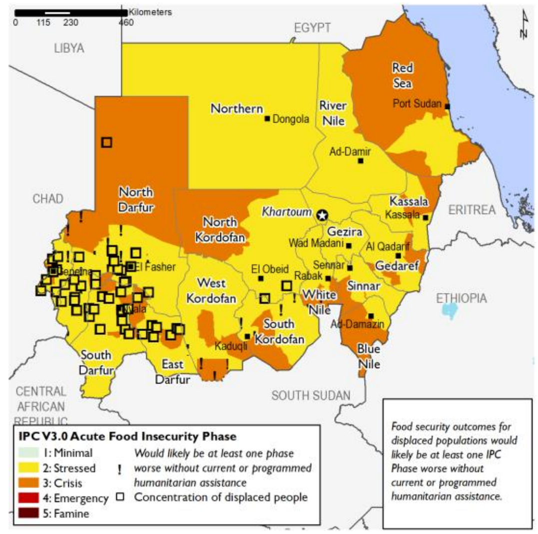
- Sudan will continue facing increased food assistance needs through September 2021 (the peak of the lean season) as extremely high food prices continue to limit poor household purchasing power, along with conflict and flooding reducing availability and access to food and income. The number of households facing Crisis (IPC Phase 3) outcomes is expected to remain high among IDPs and people recently affected by tribal clashes in Darfur, Kordofan, and White Nile states, flood-affected households, Ethiopian and South Sudanese refugees, poor households in eastern and western Sudan who have exhausted their food stocks, and urban poor households.

- Through August, above normal seasonal rains have been reported over Sudan, although below-average rainfall and flooding occurred in some areas. According to CHIRPS remote sensing products, cumulative rainfall has been above normal across most of Sudan as of mid-August. The above-average seasonal rainfall is likely to benefit crop yields and pasture conditions and increase the risk of flooding in low-lying and riverine areas. However, planted areas and yields are likely to be adversely affected by fuel shortages and high prices of agricultural inputs.

- Between June and July, staple food prices have continued to increase by 10-20 percent seasonally and remain significantly above average across most markets in Sudan. Seasonally reduced market supplies, increased demand for local consumption, extremely high production and transportation costs, persistent shortages and the high cost of imported wheat and wheat flour, and the continued devaluation of the Sudanese Pound is limiting poor household access to food during the lean season. Staple food prices remained 120-200 percent higher than the respective prices last year and over five times the five-year average between June and July.

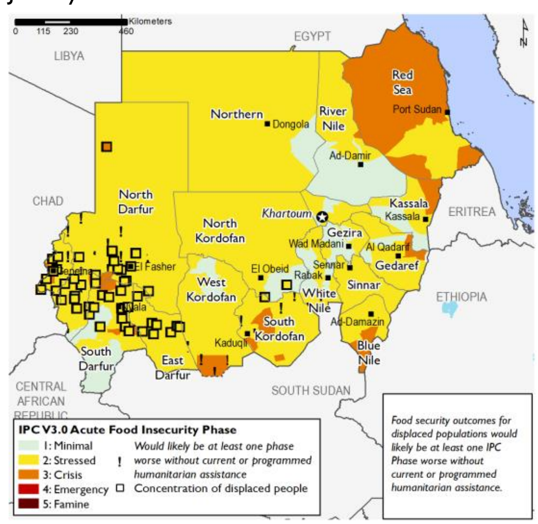
- Intercommunal conflict incidents have significantly increased in Darfur and some other parts of the country during July and August 2021, with the start of rainy season cultivation and seasonal movements of nomads into the northern wet season grazing areas. The violence is likely to track with the seasonal movements of nomadic groups into southern grazing areas at the start of the transhumance in October/November 2021, which coincides with the agricultural harvest period.

Projected food security outcomes, August to September 2021



Source: *FEWS NET*

Projected food security outcomes, October 2021 to January 2022



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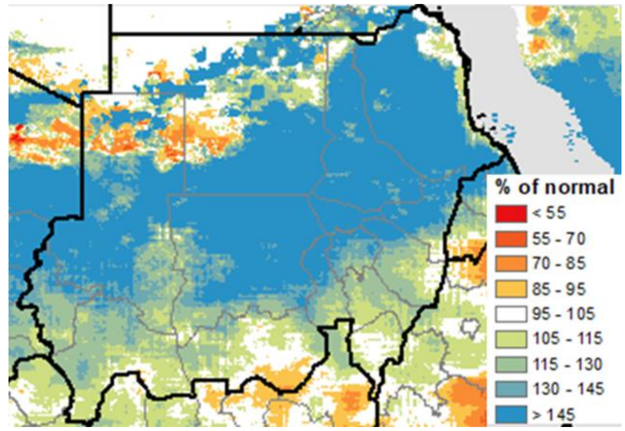
CURRENT SITUATION

Seasonal performance

According to CHIRPS satellite data, as of August 10, cumulative rainfall has been greater than 130-145 percent of normal across the central swath of Sudan and 105-115 percent of normal in the southern states (Figure 1). In the northern parts of North Darfur, parts of Northern state, and parts of South Kordofan, cumulatively below-average rainfall has been recorded due to poor rains in June and July. In late July and early August, heavy rains in some parts of Sudan and the Ethiopian highlands resulted in flash floods in many areas and river flooding in several states along the River Nile banks. According to OCHA, as of August 22, over 61,800 people were affected, with around 12,000 damaged or destroyed homes, along with damage or destruction to public infrastructures and farmland. Further assessments on the impact of flooding are taking place. The most affected states include Gezira, Gadaref, Khartoum, North Kordofan, River Nile, Sinnar, South Darfur, South Kordofan, West Darfur, and White Nile.

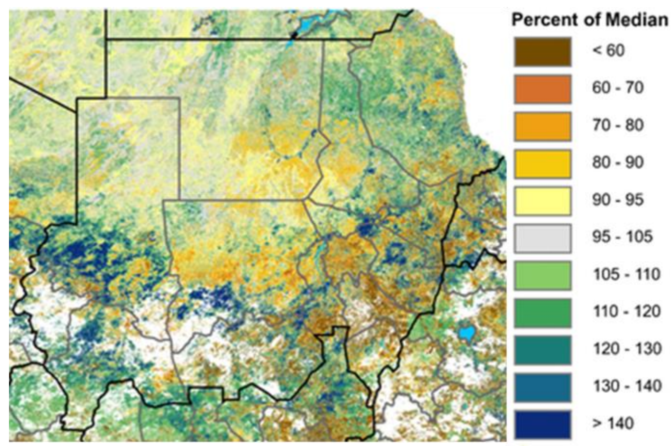
Figure1. Seasonal rainfall accumulation percent of normal June to September 2021, June 01 through August 10, 2021



Source: *FEWS NET*

The above-average rainfall in July and August has supported favorable crop development and pasture regeneration across Sudan. However, in August, heavy rains and flooding submerged at least 70 sq km of agricultural lands in Gezira, Khartoum, Sinnar, White Nile, and Gedaref states. In parts of North Darfur, western parts of North Kordofan, southern parts of West and South Kordofan, and parts of Blue Nile and Sinnar states, there are pockets of areas where delayed planting and below-average crop development has been reported by the State Ministry of Production and Economic Resources (MoPER), due to delayed and below-average rainfall in June and July.

Figure 2. Vegetation conditions compared to the 2003-2017 median based on the eMODIS Normalized Difference Vegetation Index for August 01-10, 2021



Source: *FEWS NET*

According to the Normalized Difference Vegetation Index (NDVI), there is above-average vegetation greenness across central, western, and southwestern Sudan (Figure 2). However, average and below-average vegetation greenness in central and southeastern Sudan is likely due to heavy rains and flooding impacting vegetation and crop development. As of mid-August, the planting of cereal crops and some cash crops has continued, particularly in the traditional rain-fed sectors in western Sudan. Most farmers are expected to plant early maturing varieties of sorghum and millet to harvest in time. Generally, most farmers report that the major constraints of the ongoing season are shortages and the high cost of labor and agricultural inputs, which are approximately 300-450 percent above prices compared to last year. By the end of July, in some semi-mechanized sectors in Gadaref, Blue Nile, and Sennar states, there are reports that the area planted for cash crops is 40-50 percent below normal of the targeted areas due to delayed rains at the beginning of the season, and high costs and shortages of input and labor. In these areas, farmers are likely to prioritize planting early maturing sorghum varieties rather than cash crops to maximize yields and income before the agricultural season ends. Farmers are expected to increase the use of herbicides to control pests following the late and heavy rains, contributing to the already high cost of production.

Desert locust

According to FAO, in July, a few second to fifth instar hopper bands and groups of hoppers and immature and mature adults formed in the second in the northern Nile Valley near Karima. Mature solitarious adults were scattered throughout North Kordofan and along the western side of the Red Sea Hills, with ground teams treating 525 hectares of land. Through mid-

August, fledging of desert locusts will continue in the northern Nile Valley, and a few small adult groups could form. Small-scale breeding will cause desert locust numbers to increase within a large area between North Darfur and the Red Sea Hills. According to ICPAC's August 2021 Desert Locust update, there is a high risk to crops and rangelands due to the swarms recorded at the critical time of planting of main season cereals crops. Sinnar and Gadaref states have been identified as areas of highest risk for desert locust swarm invasion, although swarms have not yet been reported in Sudan.

Macroeconomic crisis

On June 29, 2021, the IMF and World Bank approved Sudan's eligibility for debt relief under the Enhanced Heavily Indebted Poor Countries (HIPC) Initiative. If Sudan reaches the HIPC Completion Point in three years, Sudan's external public debt will be irrevocably reduced through HIPC debt relief and other debt-relief initiatives anchored to the HIPC initiative-by more than 50 billion USD in net present value terms, representing over 90 percent of Sudan's total external debt.

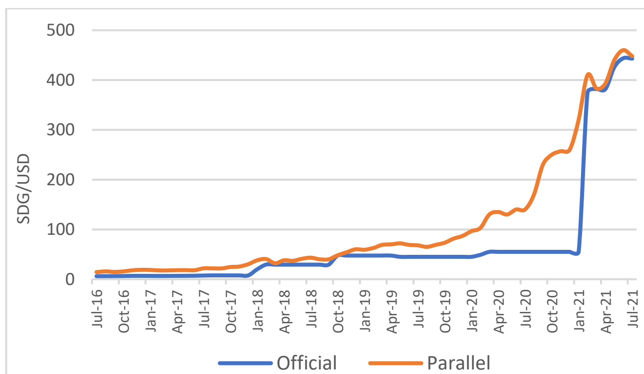
In the meantime, Sudan's economy continues facing major difficulties such as low foreign currency reserves, high depreciation of the Sudanese Pound, and high inflation resulting in high food and transport costs, and shortages and high prices of medicine, energy, and imported food and non-food items. From late July to mid-August 2021, the SDG exchange rate remained at 443 SDG/USD and 448 SDG/USD in the official and parallel exchange rates, respectively (Figure 3). National inflation rose around 44 points from May to July (422.78 percent) due to the fiscal deficit's large monetization, which has been exacerbated by shortages of food, medicine, and fuel.

Conflict and displacement

The peace talks and direct negotiation sessions between the Sudanese transitional government and the Sudanese People's Liberation Movement-North (SPLM-N) – Al Hilu faction have been on hold since mid-June 2021. However, as of mid-August, the situation has remained generally calm in the SPLM-N areas of South Kordofan. Field information indicates that more households in the area have relatively better access to cultivation this season than last year.

Intercommunal conflict incidents have significantly increased across Sudan, particularly in Darfur, with the start of the rainy season and cultivation in July and August. The increased conflict incidents have increased displacement and resulted in the loss of lives and livelihood assets and disruptions to the agricultural season. Between June and August 2021, tribal conflicts in West Darfur, North Darfur, South Darfur, and White Nile State have displaced over 43,000 people. Most IDPs are located in surrounding villages or existing IDP camps in nearby main towns. Verified and registered IDPs receive multi-sector emergency humanitarian assistance, while unverified IDPs depend on communal support.

Figure 3. Sudanese Pound (SDG) to U.S. Dollar (USD) exchange rate, official and parallel market, July 2016 – July 2021



Source: *FEWS NET/FAMIS*

In eastern Sudan, the conflict in the Tigray region of Ethiopia in late June and early July resulted in a new influx of refugees towards Sudan. Between August 8-14, UNHCR registered around 1,277 new arrivals at the Hamdayet and Basundah transit centers. Since November 2020, over 64,500 Ethiopian refugees have arrived in Sudan. New arrivals are provided with core relief items such as blankets, sleeping mats, jerry cans, plastic sheets, soap, and solar lamps. Refugees continue to receive two meals of lentils and injera per day, prioritizing persons with specific needs and lactating mothers.

COVID-19 outbreak and control measures

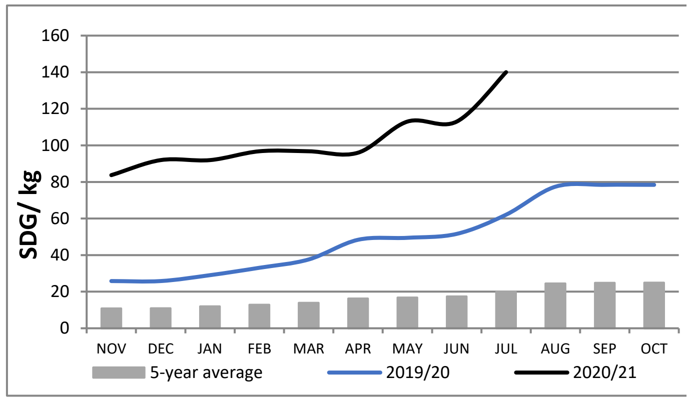
In July, Red Sea and Khartoum sate recorded increases in confirmed COVID-19 cases. The daily average of cases increased from 12-15 in early July to 35-38 in the third week of July 2021. The Ministry of Health and COVID-19 emergency committee considers Red Sea state an emergency area and has advised people to reduce traveling to and from the state. As of August 25, 2021, there have been 37,699 confirmed COVID-19 cases since March 2020. As of August 22, 2021, Sudan has administered at least 829,682 doses of a COVID-19 vaccine, enough to vaccinate around 1 percent of the population. Compliance with COVID-19 control measures and health recommendations continue to be weak across Sudan.

Staple food prices and terms-of-trade

Between July and August 2021, sorghum and millet retail prices seasonally increased by 10-20 percent across most markets while remaining relatively stable in Al Gadaref, Dongola, Kosti, and El Damer. In July, sorghum and millet were sold on average at 120 SDG/kg and 174 SDG/kg, respectively, a 12 percent and 6 percent increase in retail prices since June. This increase was mainly attributed to the seasonally reduced market supplies and increased demand for local consumption (due to increases in bread prices), exacerbated by high transportation costs and the devaluation of the Sudanese Pound. In some of the main production markets of Gadaref, Kadugli, Kosti, and Ad Damazine, staple food prices have been stable or slightly decreased as traders started releasing more of their stocks into the market following the improved rainfall during July and the anticipation of price decreases following the upcoming harvest. Sorghum and millet prices have remained approximately 120-200 percent higher than July 2020 and about 500-600 percent above the five-year average.

Locally produced wheat prices remained relatively stable across most wheat production and consumption markets in Sudan. Between June and July, prices were unchanged in Madani, Ad Damazine, and El Damer, likely due to the availability of some household and market stocks from the April 2021 harvest. In Kassala, Singa, and El Obied markets, prices slightly increased; however, Dongola and Al Gadaref markets reported a 20 percent increase between June and July due to increased purchase by the Strategic Reserve Corporation of the Agricultural Bank of Sudan. In the Dongola market, the main wheat production and consumption market, locally produced wheat sold for 200 SDG/kg in July compared to 166 SDG/kg in June, around 200 percent over respective prices in 2020 and almost six times above the five-year average. High locally produced wheat prices are mainly attributed to the continued higher than normal demand for local wheat due to shortages and high prices of imported wheat and wheat flour.

Figure 4. Retail prices of sorghum, El Obied market, North Kordofan state, November 2020-July 2021



Source: *FEWS NET/FAMIS*

Between June and July, goat and sheep prices increased 20-40 percent across most main markets. The increase in livestock prices during this period is attributed to high demand for local consumption during *Eid Al Adha* festivals, along with good animal body conditions due to seasonally improved availability of water and pasture in the main grazing areas, in addition to high transportation costs and the devaluation of the Sudanese Pound. Across the main livestock markets, the July 2021 goat and sheep prices are almost 200-250 percent above last year and about 700-750 percent above the five-year average.

The livestock-to-cereal terms-of-trade (TOT) continued to improve between June and July 2021 as livestock prices increased at greater rates than sorghum prices. In July 2021, the goats-to-sorghum TOT in Al Gadaref's main market was 153 kg of sorghum per head of a goat, a 27 percent increase compared to June, driven largely by a 30 percent increase in goat prices while sorghum prices remained relatively stable. The July goat-to-sorghum TOT in Al Gadaref was approximately 175 percent above respective prices last year and 167 percent above the five-year average. In the Zalengi market, Central Darfur, the wage-labor-to-sorghum TOT in July remained at 13 kg of sorghum per daily wage as the increase in sorghum prices offset increases in labor wages. The wage-labor-to-sorghum TOT for the Zalengi market remained 45 percent above last year but 20 percent lower than the five-year average. The increase in wage-labor-to-sorghum TOT compared to last year is likely due to increases in labor wages following the depreciation of the Sudanese Pound, and a high dependency on local labor due to the conflict in Ethiopia disrupting typical seasonal labor migration from Ethiopia, which has resulted in labor shortages in semi-mechanized agricultural areas. Based on a 2100 kcal requirement, 13 kg of sorghum would likely last a family of six around 3-5 days. According to ground data, one to two people per household are likely to earn daily wages one to two days per week and work on their farms. However, the high costs of non-food needs, such as healthcare and transportation, limit household purchasing power. In the semi-mechanized and irrigated sectors, agricultural wages are 100-150 percent higher than in the traditional sectors located in rural areas of Darfur and Kordofan.

Humanitarian assistance

Between August and December 2021, WFP plans to distribute 206,841 MT and 25.5 million USD in cash to 8.6 million beneficiaries. Although no regular humanitarian access to SPLM-N-controlled areas of South Kordofan and parts of Jebel

Mara and Blue Nile is assumed for this scenario period, the recently signed peace agreement and the ongoing peace talks and efforts by the government and SPLM-N El Hilu could lead to increased access and assistance in these areas. According to WFP food distribution figures for May 2021, around 38,700 people in SPLM-N areas received humanitarian food assistance. In government-controlled areas of South Kordofan, around 232,000 beneficiaries have received humanitarian food assistance. In SPLM-N areas of South Kordofan, the planned number of beneficiaries through December 2021 is approximately 85,700 people.

Following the Sudan Family Support Program launch in February 2021, the government has registered 901,262 households through July, primarily in South Darfur, Red Seas, Kassala, and Khartoum. The program aims to mitigate the adverse effects of the economic reform measures for the most vulnerable families in Sudan. From March to July 2021, around 253,000 households have received around 5 USD per family member per month. The 18-month program is expected to expand across Sudan gradually.

UPDATED ASSUMPTIONS

Most of the assumptions used to develop FEWS NET's most likely scenario for the Sudan Food Security Outlook for June 2021 to January 2022 remain unchanged except for the following:

- Intercommunal conflict in Darfur has increased with the start of the rainy season and cultivation in July and August 2021, creating disputes over cultivable lands and grazing areas. There is likely to be a brief reprieve in the intensity of violence over land access with the start of transhumance in September 2021, but an increase in violence will likely follow this reprieve in sporadic attacks on villages that will likely escalate through the January 2022 harvest season. Simultaneously, it is likely that the period from September 2021-January 2022 will increase the number of armed clashes between factions of the Sudan Liberation Army-Abdel Wahid, coinciding with seasonal movements of nomadic groups into southern grazing areas.
- Tensions between Sudan and Ethiopia over the disputed al-Fashqa triangle and the filling and operation of the Grand Ethiopian Renaissance Dam (GERD) have led to increased incidents of small-scale attacks between Sudanese forces and Ethiopian armed militiamen. Such incidents are likely to increase during the harvest period between October 2021 to January 2022, surpassing levels observed in previous years due to an increased military presence on the Sudan-Ethiopian.
- According to the Sudanese authorities, thousands of Ethiopian refugees have crossed the border into Al Gadaref, Sudan, in late July and early August 2021, following renewed fighting between state and non-state armed actors in the Tigray and Amhara regions. It is likely that fights between these groups in Tigray, particularly close to the nearby Sudanese borders, could trigger a considerable influx of refugees through the outlook period.

PROJECTED OUTLOOK THROUGH JANUARY 2022

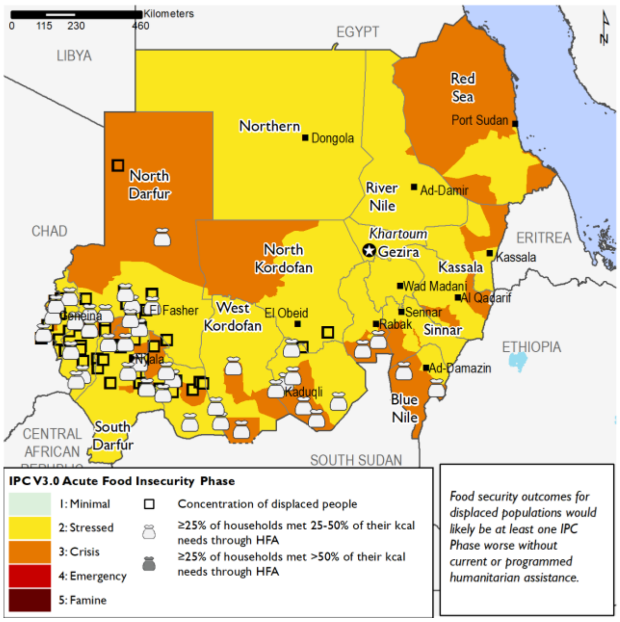
With the typical peak of the lean season in September, most poor households will be entirely dependent on market purchases, gifts, social safety nets, and food assistance. The anticipated rise in already high cereal and non-cereal food item prices will reduce poor households' access to food, while the risk of tribal clashes in many areas will continue limiting IDPs and poor household's access to cash income and food from agricultural labor opportunities along with their own production during the ongoing cultivation season. Poor households are likely to increase their reliance on support from the *Zakat* chamber and better-off family members to reduce food consumption gaps. The most food-insecure households are IDPs, households affected by tribal clashes in parts of Darfur, Kordofan, and White Nile, IDPs in SPLM-N controlled areas of South Kordofan and the Blue Nile, and poor households in the marginal areas of the northern Red Sea and Darfur, flood-affected households in the main flood-prone areas, and urban poor households. Overall, these households are expected to face Crisis (IPC Phase 3) outcomes in August and September 2021.

From October 2021 to January 2022, the start of the upcoming harvest will likely increase household food access from own production, in-kind payments from agricultural labor, and in-kind *Zakat* of the harvest. Additionally, many poor households will increase access to cash income from agricultural labor opportunities during the harvest period and the collection and sale of wild food and forest products. Cereal prices are likely to decline seasonally during the harvest period but will remain above average due to the anticipated high production and transportation costs. Accordingly, many areas in Sudan are expected to be Stressed (IPC Phase 2). Still, most IDPs and poor households in conflict-affected areas will continue facing food consumption deficits and income below their livelihood protection thresholds, remaining in Crisis (IPC Phase 3) through January 2022.

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

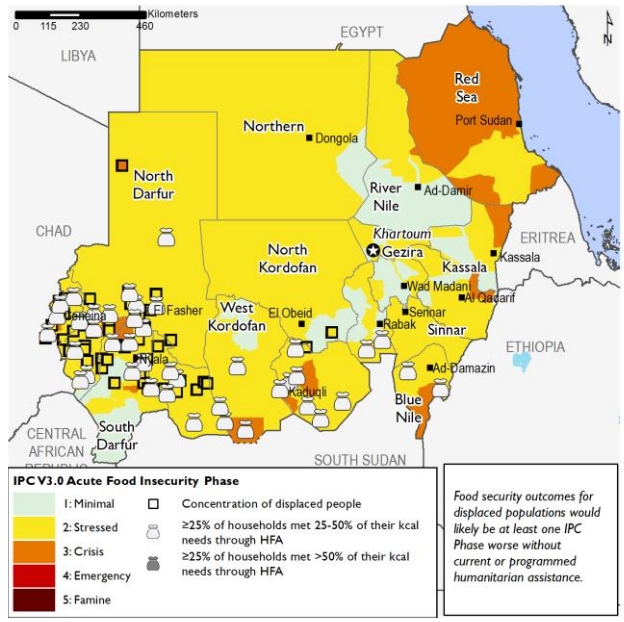
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food 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 2021



Source: *FEWS NET*

Projected food security outcomes, October 2021 to January 2022



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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.