Harvests improving food security, but flooding and pests raise concerns about crop yields

KEY MESSAGES

- Many areas of Sudan are expected to face Minimal (IPC Phase 1) or Stressed (IPC Phase 2) acute food insecurity between December 2019 and January 2020, as harvests improve food access for many households. However, very high staple food prices are continuing to result in above-average humanitarian assistance needs. Conflict-affected areas of South Kordofan and Jebel Marra, and parts of northern Kassala, North Darfur, and White Nile will be in Crisis (IPC Phase 3) through January.

- Between February and May 2020, food security is expected to deteriorate as household food stocks begin to be depleted, livestock productivity declines, and staple food prices increase seasonally. Parts of North Kordofan, central Kassala, and Red Sea State will deteriorate to Crisis (IPC Phase 3) during this period, while parts of South Kordofan and Jebel Marra will deteriorate to Emergency (IPC Phase 4) by May 2020 in the absence of humanitarian assistance.

- Recent field reports suggest a late end to the rainy season, flooding, waterlogging of crops, and pest infestations reduced main season crop yields, though reports indicate area planted is above normal. Staple food prices are expected to remain much higher than normal during the outlook period, and should production be lower than expected, households could exhaust their food stocks and market supply could tighten earlier than normal in mid-2020.

CURRENT SITUATION

The main agricultural season is coming to a close with harvests of most cash crops complete and cereal harvests to be completed by late January 2020. Overall, reports indicate national area planted in crops in 2019 is above average and available information from the field also suggests there has been a shift in area planted from cereal crops to cash crops this year.

Main season crop yields are reportedly lower than usual due to flooding, an extended rainy season, and pest infestations. This is despite a favorable start to the season that facilitated planting and early crop development. Significant waterlogging, particularly of sorghum, reportedly limited grain development and led to particularly severe impacts in flood-prone areas. In addition, mid-season dry spells in isolated areas have reportedly reduced yields.
Cultivation of wheat during the 2019/20 winter season is underway. Most of the area planted is in government-irrigated schemes in Al Jazeira, Halfa and Sennar states, while the remaining area is under small-scale cultivation in Northern, River Nile, White Nile, and Khartoum states. Actual area cultivated as of mid-October was estimated at 529,000 feddan which is moderately lower than usual. Key challenges for this winter’s cultivation include the high cost of agricultural inputs, fuel shortages, and reduced access to agricultural finance.

In pastoral and agropastoral areas, livestock are returning north to their winter grazing areas. The return of livestock, coupled with seasonal increases in milk production during and following the rainy season, are improving milk availability and food consumption at the household level. However, among many pastoral households, livestock ownership is low among poor households, whose main sources of income also include labor migration. As a result, improvements in food consumption due to improvements in livestock productivity may be more seasonally limited among poor households.

Since the onset of main season harvests, increased demand for harvest labor has improved access to seasonal agricultural labor opportunities. The increased cultivation of cash crops such as sesame and groundnut, the latter of which are highly labor intensive, has also driven increases in labor demand. In general, seasonal agricultural wages also have increased by 7 to 10 percent between October and December 2019 and remained 40 percent higher compared to the same period last year and almost double the five-year average.

The macroeconomic situation in Sudan remains very poor. The value of the Sudanese Pound has depreciated on the parallel market from 69 SDG/USD in October to 81 SDG/USD in November, and to 88 SDG/USD in December. This depreciation continues to be the result of shortages of hard currency, which is also leading the private sector and government to face difficulty importing sufficient amounts of essential food and non-food items. Fuel shortages are continuing to drive up transportation costs across the country to more than double those observed last year. This, combined with high input costs for locally produced items, continues to drive increases in prices for essential, imported and locally produced commodities.

Field reports indicate security conditions in South Kordofan, and Jebel Marra in Darfur have improved in recent months. Increased numbers of household members from SPLM-N-controlled areas are reportedly seeking labor and accessing markets in government-controlled areas and are also beginning to access agricultural fields away from the homestead. Successive years of insecurity have driven losses of livelihoods assets and severe coping among households. Significant time will be needed before households can fully restore their livelihoods strategies, especially in the context of ongoing high staple food prices occurring nationally.

Sorghum and millet prices continued to increase in November, a time when availability of harvests should begin to result in seasonal declines in prices for locally produced cereals. Increases of 10 to 20 percent across most markets are reportedly due to high production costs this year, combined with continued depreciation of the Sudanese Pound and high prices of imported wheat and wheat flour. November 2019 levels of sorghum and millet prices were on average 60 percent higher than in November 2018 and over 260 percent higher than the recent five-year average. Prices for locally produced wheat were 173 percent higher than in November 2018 and 285 percent above the five-year average.

Labor to cereal terms of trade remain much lower than normal, while seasonal increases in livestock prices have helped to support livestock to cereal terms of trade. Meanwhile, livestock prices increased by 10 to 15 percent between October and November in most main markets in Sudan. These increases are reportedly due to a combination of seasonal improvements in pasture and water availability, as well as continued depreciation of the Sudanese Pound. On average, prices for sheep and goats in November 2019 were double the levels observed last year and 250-300 percent above the five-year average.
UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET’s most likely scenario for the Sudan Food Security Outlook for October 2019 to May 2020 remain unchanged.

PROJECTED OUTLOOK THROUGH May 2020

- Harvests currently underway are improving household food access, but emergency food assistance needs are expected to remain above average during the post-harvest period. Food access is improving among agricultural and agropastoral households, as harvests currently underway are helping to rebuild cereal stocks at the household level and provide cash income from the sale of crops. However, staple food prices remain much higher than in past years, and much higher than is typical for this time of the year. Even as households access agricultural labor during the harvest, these high staple food prices are reducing household purchasing power, to the detriment of households remain dependent on market purchases to access staple foods at this time of the year. Accordingly, while many areas will improve to Minimal (IPC Phase 1) and Stressed (IPC Phase 2) through January 2020, Crisis (IPC Phase 3) food insecurity outcome is likely among IDPs in SPLM-N controlled areas of South Kordofan, IDPs and conflict-affected households in Jebel Marra in Darfur, and among populations in Abyei, northern parts of North Darfur, parts of North Kordofan, parts of Kassala and Red Sea States.

- Between February and May 2020, food security outcomes are expected to deteriorate further. Household food stocks will begin to be depleted, and livestock productivity and body conditions will decline in advance of the 2020 rainy season. Moreover, staple food prices will continue to increase as market supply tightens. Should harvests be worse than currently expected, staple food prices could increase even further. In the most likely scenario, poor and conflict-affected households in areas affected by low production this season will face earlier than typical food consumption gaps. Therefore, increased number of people in North Darfur, parts of North Kordofan areas affected by flooding in White Nile, southern Blue Nile, and, northern Kassala, and much of northern Red Sea will face Crisis (IPC Phase 3) between February and May 2020. Food security among IDPs and conflict-affected people in parts of SPLM-N areas of South Kordofan and Blue Nile, and among IDPs in parts of Jebel Marra are likely to deteriorate to Emergency (IPC Phase 4) by May 2020 in the absence of humanitarian assistance.

ABOUT THIS UPDATE

This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET’s Food Security Outlook, which is published three times per year. Learn more about our work here.
MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ⚫ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). ⚫ indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Projected food security outcomes, December 2019 to January 2020

Projected food security outcomes, February to May 2020

Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.