FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

SOUTH SUDAN Food Security Outlook — July to December 2013

Food security outcomes improves with harvest in October

KEY MESSAGES

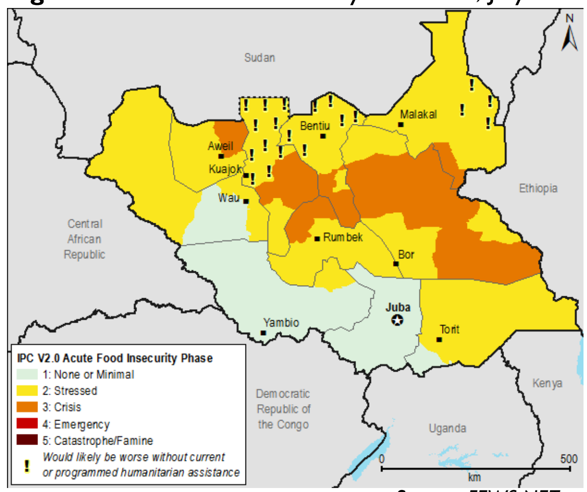
- Civil insecurity continues to limit access to markets, livestock, and humanitarian assistance, particularly in Pibor County. IPC v2.0 Phase 3 (Crisis) food insecurity is expected throughout the Outlook period.

- Significant macroeconomic stress is likely beginning in August/September due to cessation of oil production and oil revenues as a result of suspension of the Implementation Matrix with Sudan.

- The Abyei referendum is unlikely to take place as scheduled in October, and growing tensions in the area are likely to result in renewed displacement. Given continued assistance, however, to Abyei area and nearby areas of displacement, IPC v2.0 Phase 2! (Stressed) food insecurity is most likely through December.

- Near-average 2013/14 national cereal production is expected. This, combined with near-average income-generating opportunities at the start of the consumption year is likely to result in IPC v2.0 Phase 1 (Minimal) food insecurity for most households outside of conflict areas, particularly during the October-December post-harvest period.

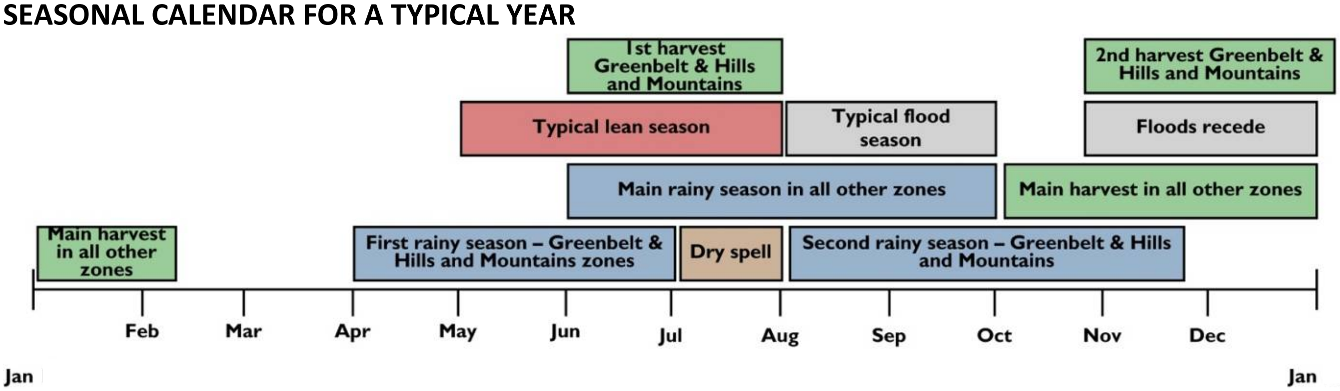
Figure 1. Current food security outcomes, July 2013



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.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: *FEWS NET*

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USAID FROM THE AMERICAN PEOPLE

NATIONAL OVERVIEW

Current Situation

Despite a rough start in parts of the north and the pastoral areas of the extreme southeast, the June-September rainy season is now well underway. Rainfall totals are generally average to above average, and vegetation indices are generally near average for this time of year and/or improving.

Prices of staple foods are high and generally follow seasonal trends. Prices of staples are generally above five-year average in all markets across South Sudan due to high inflation and the relatively higher cost of food as a result of the loss of formal access to source markets in Sudan in recent years. Price trends in June 2013 compared to previous months were mixed due, in part, to the excellent 2012/13 production. Prices started to decline in the bimodal areas of greater Equatoria following the onset of the first harvest there. However, prices in the states bordering Sudan increased in May/June compared to March/April due to normal, lean-season trends, and also to reduced informal trade with Sudan associated with increasing tensions along the common border.

Annual inflation is less than 10 percent and decreasing, primarily driven by low food prices after the excellent 2012/13 harvests. According to the National Bureau of Statistics (NBS), the national consumer price index (CPI) decreased by 11 percent between June 2012 and June 2013, driven primarily by food prices as a result of the excellent 2012/13 harvests.

South Sudan started to reduce oil production following Sudan's threat to suspend the recent Implementation Matrix and close down the pipeline, alleging South Sudan's support for rebels in South Kordofan and other border states.

Insecurity from the Yau Yau rebels and unusually acute tribal conflict has displaced almost 70 percent of the population of from Pibor County, Jonglei State, since March 2013. The remaining population is facing critical constraints to market access, which is essential to survival for this predominantly pastoral population.

National Assumptions

- **Recent forecasts in June and July concur that near-average rainfall is likely for the peak of the rainy season through September/October for South Sudan** (NOAA/CPC, ECMWF, IRI). Near-average harvests (close to 650,000 – 700,000 MT of cereals nationwide) and pasture production are likely for 2013/14.

- Agricultural production is expected to be near average in regional source markets for South Sudan.

- **The implementation of the cooperation agreements between Sudan and South Sudan regarding oil flows, trade, and grazing will not take place as planned during the scenario period.** Oil flows and related export and service fee revenues are likely to decline rapidly, reaching nil by August/September. Informal trade flows, which increased in March and April, will fall to 2012 levels when Sudan enforced tough restrictions on cross-border trade with South Sudan. Traders will prefer longer trade routes, particularly avoiding areas around Abyei, resulting in above-average transportation costs. Access for Sudanese pastoralists to dry-season grazing in South Sudan is not likely to be an issue until January 2014.

- **Similarly, the Abyei referendum is not likely to take place according to schedule.** There is no functional Abyei Administration yet in place to hold the referendum. Civil insecurity will increase in border areas, particularly in Abyei, resulting in displacement of the population currently living in the area.

- **Food prices are expected to continue to increase through August/September and decline in October – December.**

  - Following seasonal trends, cereal prices in most parts of South Sudan typically increase through August/September, reaching a peak approximately 0-10 percent greater than observed June prices. Between then and December, cereal prices normally fall, reaching a minimum between November and January that is typically about 20-25 percent below June prices.

- Despite the anticipated near-average harvests, the macro-economic brake likely to result from suspension of oil flows will drive progressive increases in inflation beginning in September/October. As a result, cereal prices are likely to fall less steeply than would be anticipated by typical trends described above.

- High demand and inflation particular to Juba are likely to result in cereal price increases through August that are slightly higher than the general national trends described above and price declines beginning in September/October are likely to be slightly lower than elsewhere.

- The recent changes to the Government of South Sudan are expected to remain relatively peaceful and are not expected to result in any significant policy changes relating to local livelihoods or assistance programming or to the assumptions above over the scenario period.

Most Likely Food Security Outcomes (Figures 2 and 3)

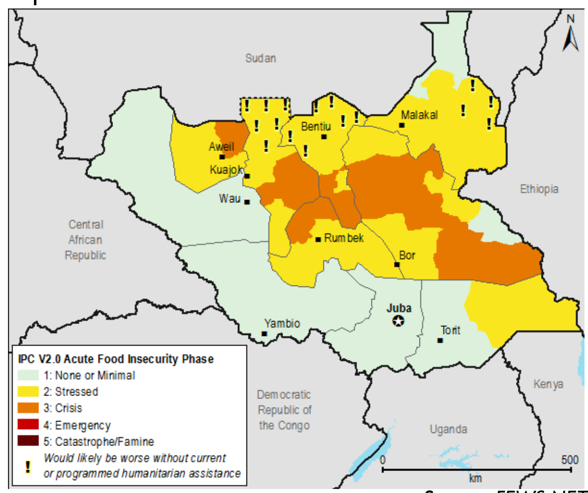
The main agricultural lean season will continue through August/September throughout most of the country, and main harvests are anticipated in most areas in October-December. Areas not affected by conflict with access to their normal livelihood strategies are likely to face Minimal acute food insecurity throughout this period.

However, in Panyijiar and Mayendit counties in Unity state, as well as in Warrap and Lakes in the center of the country, intensive inter-ethnic conflict in 2013 and some areas having experienced excessive flooding in 2012 are likely to result in early exhaustion of purchasing power for this time of year. Slight food consumption deficits (IPC v2.0 Phase 3: Crisis) through the peak of the lean season in August are likely.

Conflict-affected areas near Abyei will face below-average access to cereal and labor markets due to cereal and labor trade restrictions with Sudan and increasing conflict and further population displacement related to the delay of the referendum. However, full rations for displaced populations in these areas are likely to result in significant, positive impacts to food access, ensuring minimum food consumption if not minimum non-food needs (IPC v2.0 Phase 2!: Stressed) through December.

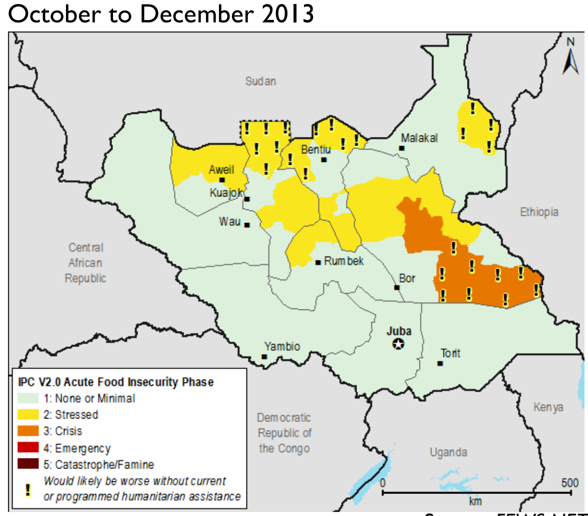
Crisis levels of food insecurity (IPC v2.0 Phase 3 and 3!: Crisis) are expected to continue through December in key, conflict-affected areas of Pibor County and Jonglei State. With the decline of rains in September/October, troop movement also becomes easier, and conflict is expected to intensify. Conflict impacts on market functioning and access to fields, livestock, and assistance will result in continued slight to moderate food deficits through at least December.

Figure 2. Projected food security outcomes, July to September 2013



Source: *FEWS NET*

Figure 3. Projected food security outcomes, October to December 2013



Source: *FEWS NET*

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PIBOR COUNTY, JONGLEI STATE

Current Situation in Pibor County

A significant portion of the population of Pibor County began the 2012/13 consumption year with below-average resilience. In Pibor in January 2012, over 60,000 people (40 percent of the population) were displaced during the October-April/May dry season, when most trade takes place. WFP reported significant increases in rates of acute malnutrition in 2012 compared to

2011 related to these issues. Repeated attacks, though at smaller scale, continued throughout 2012. In addition, below-average 2012/13 production led to above-average reliance on markets for food and expenditures on food over the course of the 2012/13 consumption year. Though the population in Pibor County is predominantly pastoral, opportunistic production is relatively more common here than in the southern part of the same livelihood zone in Kapoeta. In 2012 the cereal deficit compared to consumption needs in Pibor County was approximately 40-50 percent larger than usual (approximately 14,000-15,000 MT total deficit) due to exceptional flooding.

Displacement from typical homestead areas, early or extended livestock migration, gifts from kin, and reliance on markets outside of Pibor (Kapoeta and Ethiopia) are common strategies for coping with frequent conflict in this zone, though some households also lose all assets during conflict. The current conflict, though political in origin, has also resulted in intensified tribal conflict. As a result of this, reports from the Ethiopian side of the border suggest no significant new arrivals from Pibor in recent weeks despite continued conflict. This suggests that **access to markets and/or refuge in Ethiopia, if not acquired in June, became unavailable as a coping strategy over the course of July.**

The scale of the current conflict is significantly larger than usual; almost the entire population of Pibor County is currently displaced. Of the 148,000 residents of Pibor County, approximately 100,000 people, almost 70 percent, are estimated to be displaced since March 2013. Of those displaced, almost 30 percent have sought refuge in Ethiopia, Kenya, or Uganda; about only about 40,000 people are reported to remain within Pibor County; and the remaining 30 percent have moved outside of Pibor County but within South Sudan. Of the 40,000 displaced persons currently in Pibor County, approximately 70 percent gained access to humanitarian assistance in July. Most of the IDPs remaining in Pibor are currently living in remote areas of the county inaccessible to humanitarian assistance due to insecurity and road conditions except by helicopter through August/September. Context suggests that displacement to date has been due to fear of immediate loss of life and/or assets rather than due to food insecurity.

Most of the markets in the main towns of the conflict-affected areas are completely closed. Local markets are assumed not to function either. Small scale trade by motorcycle, bicycle, or on foot that would ordinarily take place in areas of displacement even during the rainy season is virtually non-existent. FEWS NET assumes that the cost of buyers and sellers finding time and place to meet is high. As a result, informants indicate that the price of cereals in the affected areas is nearly double that of Bor, the nearest source market.

April to June rainfall has been below average. This, combined with military and tribal conflict, has kept livestock from returning from dry-season grazing areas, in turn reducing households' access to milk and other livestock products compared to average.

The number of livestock at homestead and among the displaced is significantly lower than average; however, total household livestock holdings outside areas of displacement remains unclear. Reports of consumption of milk and animal blood and unusual slaughter indicate that some livestock is present in the area and accessible to at least some portion of the population. However, the overwhelming majority of the displaced are women and children, who do not generally herd livestock, and partner reports suggest that livestock are not visible in areas of displacement. This suggests that that many men may have moved with livestock into the bush or nearer to safer markets in Ethiopia in June or Kapoeta in July to protect household assets.

Fish and wild food availability are assumed to be average. Households are expected to be relying more on these less-preferred food sources than usual for this time of year.

Several reports suggest a high prevalence of unusual, negative coping strategies. An assessment mission in June asserted that households in Pibor were consuming milk mixed with bull blood and slaughter of female animals for meat. It is unusual for households to consume blood during the wet season when milk is available; this is usually a coping strategy reserved for dry season stress. In addition, field research indicates that bulls can be bled only 12 times per year, posing a significant constraint to the continued use of this strategy.

As a result of these issues, FEWS NET concludes that the vast majority of the population remaining in Pibor County does not have access to minimum non-food needs (health, education, agricultural input costs, livestock maintenance costs, etc.), and also faces mild to moderate food consumption deficits.

No recent nutrition surveys exist, but in early 2012, a SMART survey conducted in Jonglei state in June 2012 indicated the GAM rate to be greater than 20 percent and the SAM rate to be greater than 4 percent. Food consumption, and therefore rates of acute malnutrition, in 2013 is expected to be worse than in 2012. No information is available regarding food security-related mortality rates. Due to these food consumption, livelihood, and nutrition outcomes, the Pibor County area is currently estimated to be in IPC 2.0 Phase 3 (Crisis) in July 2013.

Assumptions for Pibor County

Fighting between the state army and the non-state armed group is likely to continue with intensity levels similar to May/June, particularly after the rains slow in September/October. Insecurity is expected to hamper cultivation; wild food collection, hunting, and fishing; and normal market access throughout the scenario period.

Formal markets are likely to remain closed throughout the outlook period, and prices are expected to be the highest in South Sudan. Unprecedented, high prices are expected on informal markets. The pastoral population in Pibor usually depends on the sale of livestock and dairy products for income to purchase food on markets, particularly beginning in October.

Due to displacement this year, the local demand for livestock will be below average, and prices for livestock are likely to be below average. Terms of trade between maize or sorghum and livestock are likely to be very low.

Wild food and fish consumption will be above average during the outlook period. Poor households will increase reliance on wild food and fish, particularly between July-September, and on hunting during the dry season beginning in October. With the persistent insecurity, access to markets for the sale of these goods will be reduced, making more available for consumption. Households are expected to increase reliance on wild foods to cope with below-average access to purchased food. In addition, FEWS NET assumes that the heavy reliance on wild foods within small areas of relative security will deplete supply significantly faster than usual (October/November for gathered foods instead of December/January) even if fewer people are surviving on these resources than usual.

WFP has programmed assistance to approximately 60,000 of the 88,000 people estimated to be residing in Pibor County between September and December as security allows.

Most Likely Food Security Outcomes in Pibor County

The primary constraint to food security of the approximately 88,000 people remaining in Pibor County over the outlook period is the constraint to access to markets, which is the primary source of income and food for exchange, particularly between October and December. Households will increase reliance on wild food during the entire scenario period and game starting from September. Even with planned assistance, the poor and the displaced are likely to face slight to moderate food deficits through December (IPC v2.0 Phase 3: Crisis).

Food Security in Areas around Pibor County

David Yau Yau, the leader of the rebellion originating in the Murle areas of Pibor County, is of Murle descent but is surrounded by areas of origin of other tribes among whom tribal strife is not uncommon. The Yau Yau rebellion is unlikely to extend beyond these areas in part due to tribal conflict. Tribal conflict and cattle raiding are likely to persist over large areas of Jonglei state. In conclusion, areas further from Pibor are likely to face significantly fewer conflict impacts on market access and livestock movement and therefore better food security conditions.

ABYEI AREA

Current Situation in Abyei

Over 110,000 people are currently displaced from Abyei area. Of the displaced, approximately 80,000 remain within Abyei area, particularly near Agok in the South. Returns to Abyei area and Abyei town continue, though more slowly than anticipated. FEWS NET estimates that over 20,000 former IDPs have returned to Abyei town and areas north of the river Kiir since June 2012. There are reports of a significant population of Messeriya nomads with livestock in grazing areas of Abyei north of River Kiir that chose not to return to wet-season grazing areas in Sudan in May with the rains as the Messeriya did in other similar latitudes of Sudan and South Sudan. The reason for the unusually prolonged presence of this group is unclear.

Income sources have declined with constraints to market access due to insecurity.

- Poor households from Abyei used to earn substantial income by migrating to Sudanese semi-mechanized farms for labor opportunities. They would return home with some food and/or cash. However, restrictions on the movement of people and goods across the border, as well as insecurity between Abyei and mechanized farming areas have constrained labor migration to Sudan among poor households.

- In response, more people are seeking local unskilled labor opportunities than usual, creating above-average labor supply. Daily wages for unskilled non-agricultural laborers fell from 50 SSP/day in July 2011 to 30 SSP/day in July 2013 (nearly 40 percent), while sorghum prices increased from 2.6 SSP/kg to 3.7 SSP/kg. Daily wage-to-sorghum terms of trade fell more than 50 percent from 19.2 kg/day to 8.1 kg/day.

- Income from the sale of firewood, charcoal, and construction poles is stable or improved compared to last year, but lower than average. Sorghum prices are 35 percent lower in June 2013 than June 2012, driving the largest share of improved terms of trade. For example, firewood-to-sorghum terms of trade are 1.4 kg/bundle compared to 0.7 kg/bundle last year, though households can only sell three bundles this year compared to four last year (income increased 50 percent). However, key informants also report that the proportion of households venturing into the bush to collect firewood and charcoal is below average due to insecurity, particularly north of River Kiir, even though terms of trade for these items is relatively high.

Prices of staple food are increasing as supplies decline seasonably. The supply of markets in Abyei area remains constrained by tensions between South Sudan and Sudan, particularly since April. The price of sorghum has increased significantly in these areas, approximately 40 percent since February. Although prices normally increase at this time of the year, the sharp rise is the result of the reduced inflow due to high levels of insecurity in the area. In June and early July, Abyei and Agok markets sourced their supplies from East Africa through Juba and Wau; however, this route will take significantly longer between July and September due to poor road conditions.

80,000 people within Abyei area have received food assistance (100 percent rations) to meet food needs since 2011. Of the approximately 110,000 people displaced from Abyei area, nearly 80,000 are estimated to be in Abyei area currently, with the majority still in Agok and areas south of River Kiir. The population that has returned to Abyei town and areas north of River Kiir are estimated to be about 20,000.

Displaced households, who are considered to be at greatest risk of food insecurity due to the loss of their normal livelihood assets, are assumed to be entirely reliant on food assistance. These households are able to meet their minimum food needs through the 100 percent rations they receive, in addition to some wild foods and purchases from income earned through day labor and petty trade. FEWS NET assumes that these households have no livelihood assets and are unable to meet their minimum non-food needs despite their assistance. FEWS NET assumes that rates of acute malnutrition and mortality are seasonably high and will increase seasonably through September as hygiene and health decline with the rains. As such FEWS NET classifies Abyei area as IPC 2.0 Phase 2! in July 2013.

Assumptions for Abyei

The Abyei referendum is not expected to take place on time. As October draws closer and no functional administration exists to date to hold the planned referendum, FEWS NET assumes that the referendum will not take place as scheduled. This is expected to heighten tensions with possible intermittent clashes. As a result, many people who have returned to Abyei town will likely be displaced again.

With limited access to cultivation land in areas of displacement and a lack of seeds and tools, most of poor households are not likely to cultivate their normal area planted, resulting in below-average crop production.

Poor households' access to wild foods, a common food source, particularly in times of crisis, will be hindered by insecurity beginning in October, particularly in areas north of River Kiir.

Prepositioned stocks are likely to remain accessible to humanitarian agencies and displaced populations even if conflict intensifies in September/October.

Most Likely Food Security Outcomes in Abyei

Poor and displaced households in Abyei are expected to meet their minimum food needs through 100 percent rations, in addition to wild foods and fish and kinship support through December. However, as conflict increases beginning in September-October, additional displacement may occur. Humanitarian access to the displaced is expected to remain functional. 100 percent rations are planned, funded, and assumed likely throughout the outlook period. Poor and displaced households in Abyei will therefore face IPC 2.0 Phase 2! (Stressed) throughout the scenario period.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

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

Area	Event	Impact on food security outcomes
National	Implementation of the cooperation agreement as outlined in the Implementation Matrix	Inflation would slowly return to current levels of approximately 10 percent, and the cost of trade would decline, lowering the cost of food for net-purchasers.
Northern Bahr el Ghazal, Warrap, Unity and Upper Nile, Western Bahr el Ghazal	Implementation of the cooperation agreement as outlined in the Implementation Matrix	Trade and cross-border migration would gradually increase, improving access to food and income compared to the most likely scenario above.
Pibor	Reduction of conflict or improved access to trade or humanitarian interventions	Humanitarian access would improve. Many displaced would return to their places of origin and resume normal livelihood activities, preventing the deterioration of food security.

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.