FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

SUDAN Food Security Outlook — July to December 2014

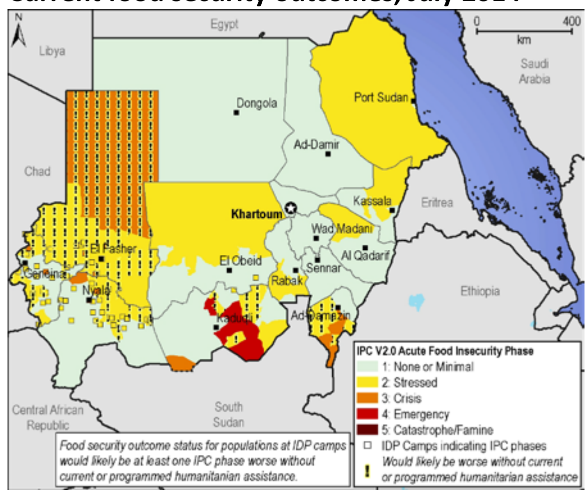
Seasonal improvements in food security expected as harvests begin in October

KEY MESSAGES

- As of July 2014, an estimated 5.3 million people in Sudan face Stressed (IPC Phase 2), Crisis (IPC Phase 3) or Emergency (IPC Phase 4) acute food insecurity. Ongoing conflict in Darfur, South Kordofan, Blue Nile, and West Kordofan, have disrupted livelihoods and reduced household food access, especially for internally displaced persons (IDPs). The persistent rise of staple food prices has reduced household capacity to meet minimum food requirements during the peak of the lean season when households are the most market dependent.

- Cumulative rainfall was near average over most parts of Sudan in July, except in some parts of North, West and South Darfur states. Seed shortages and increased costs of agricultural inputs, in addition to ongoing civil insecurity in Darfur, are expected to reduce the overall area planted in these areas.

Current food security outcomes, July 2014



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.

- Staple food prices remained at record-high levels in markets across Sudan in June. Sorghum prices were on average, 80 percent above last year and 120 percent higher than the June five-year average. Millet prices in June were 95 percent higher than last year and 150 percent above the five-year average. Seasonal decline in cereal prices is expected during the October to December harvest period, although it is unlikely that prices will stabilize to normal levels in the coming months.

- Improvements in food security are expected as harvests become available in October, although below-average harvests in some areas are expected to limit food availability during the harvest period, especially in Darfur.

SEASONAL CALENDAR FOR A TYPICAL YEAR

Source: *FEWS NET*

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NATIONAL OVERVIEW

Current Situation

As of July 2014, an estimated 5.3 million people in Sudan face Stressed (IPC Phase 2), Crisis (IPC Phase 3) or Emergency (IPC Phase 4) levels of acute food insecurity. The food insecure population has increased by 18 percent since the beginning of lean season in April. Below-average 2013/14 production has substantially reduced household food stocks and supplies to markets, causing the continued rise of stable food prices in nearly all markets to record-high levels. The combination of the continued deterioration of macroeconomic conditions, including rising inflation and devaluation of the Sudanese Pound (SDG), continued spikes in food prices, and renewed conflict in South Kordofan, Darfur and West Kordofan states, has caused a drastic deterioration in food security outcomes in recent months. In addition, the crisis in South Sudan has significantly reduced oil revenues, straining the national budget and foreign reserves. The continued influx of South Sudanese refugees has increased pressure on host communities' resources and strained the humanitarian aid community.

Since February 2014, the Sudan Armed Forces (SAF) intensified military operations against Darfur rebel groups in North and South Darfur. Active conflict has resulted in burning of villages and looting of assets, including livestock, and displacing about 400,000 people. Internally displaced persons (IDPs) have either fled to camps or sought refuge with host communities.

Conflict and displacement remains a key driver of acute food insecurity. Nearly 70 percent of the current food insecure population is in areas affected by conflict in Darfur, South Kordofan, Blue Nile, and Abeyi. Food security outcomes are worst among IDPs in areas of South Kordofan controlled by the Sudanese People's Liberation Movement-North (SPLM-N) where populations are currently in Emergency (IPC Phase 4). IDPs in SPLM-N-controlled areas of Blue Nile State, new IDPs in Darfur and West Kordofan, returnees/refugees in Abeyi, and South Sudanese refugees in White Nile, South Kordofan and West Kordofan states are currently in Crisis (IPC Phase 3).

Cumulative rainfall in July was near average over most parts of Sudan. Improved rainfall during the last dekad of July replenished soil moisture necessary for planting and crop germination in most parts of Sudan (Figure 1). Rainfall was 10 to 25 millimeters (mm) below average in western parts of the country, including North Darfur and northern parts of West, South, and Central Darfur states (Figure 2). Heavy rains in central and northern Sudan since the third dekad of July caused severe, widespread flooding and damaged infrastructure in Khartoum, River Nile, and Al Gazeira states. Planting and weeding is ongoing in agricultural areas, but the increased cost of inputs and insecurity in conflict-affected areas is expected to result in reduced area planted, especially in Darfur and South Kordofan.

Figure 1. Rainfall estimate (RFE) in mm for the third dekad of July, 2014

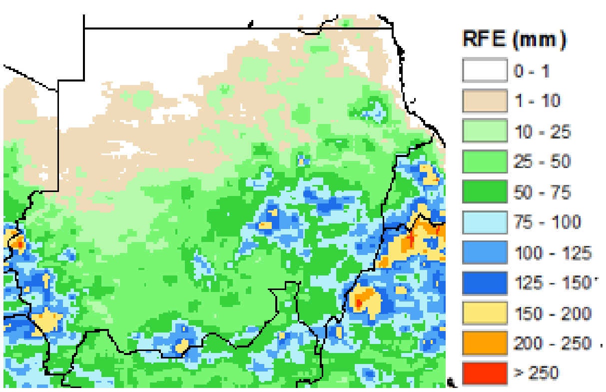
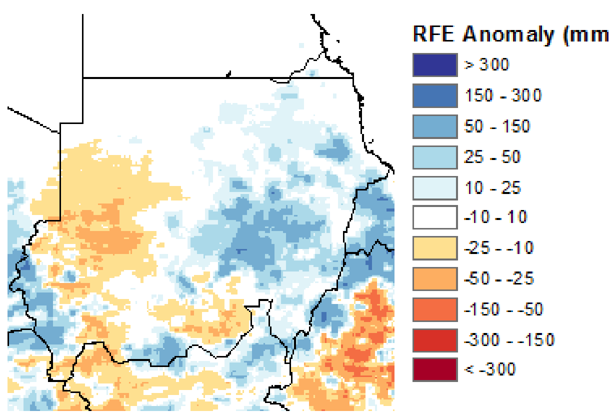


Figure 2. Rainfall anomalies for the third dekad of July, 2014

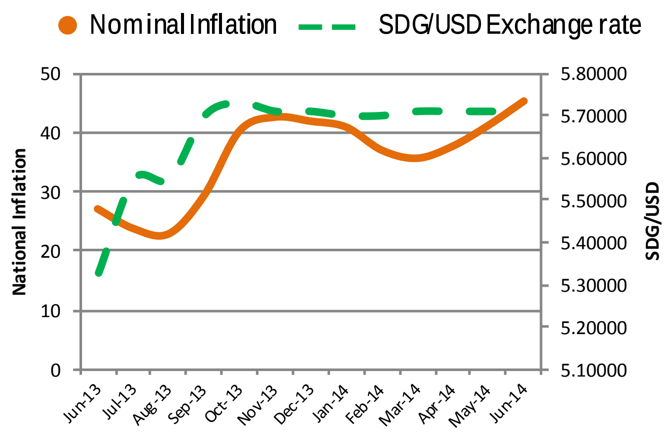


Source: USGS

Intensified conflict in Darfur since February has displaced nearly 400,000 people, the largest wave of displacement since conflict erupted there 12 years ago. Although 30 to 35 percent of new IDPs returned to their home villages by early July, widespread loss of assets and reduced access to land for planting because of insecurity has compromised household access to food and livelihoods. Escalated conflict also displaced 25,000 people in Western Kordofan during the first half of 2014. In June, an estimated 100,000 people in South Kordofan fled to SPLM-N-controlled areas of the Nuba Mountains following heavy fighting between the SAF and the SPLM-N. Conflict has disrupted local livelihoods, the social fabric of local communities, trade flow, and the provision of humanitarian services. Massive displacement has forced farmers to abandon their fields, preventing timely planting. Disruptions to agricultural activities are expected to be worst in SPLM-N controlled areas of South Kordofan where heavy fighting is ongoing.

National inflation continued to rise in June. National inflation rose from 41 to 45 percent from May to June and is currently 18 percent higher than last year, while the formal exchange rate remained stable at 5.7 Sudanese Pounds (SDG) per 1 USD (Figure 3). The exchange rate on the informal market is currently 9.4 SDG per 1 USD. The informal exchange rate has a more significant influence on prices because most traders finance imports with currency exchanged on the informal market. As Sudan continues to import most of its food, continued decreases in foreign currency reserves are expected. Further devaluation of the Sudanese Pound will continue to put upward pressure on prices of essential commodities like food, medicine and fuel.

Figure 3. National Inflation and formal exchange rate, June 2014

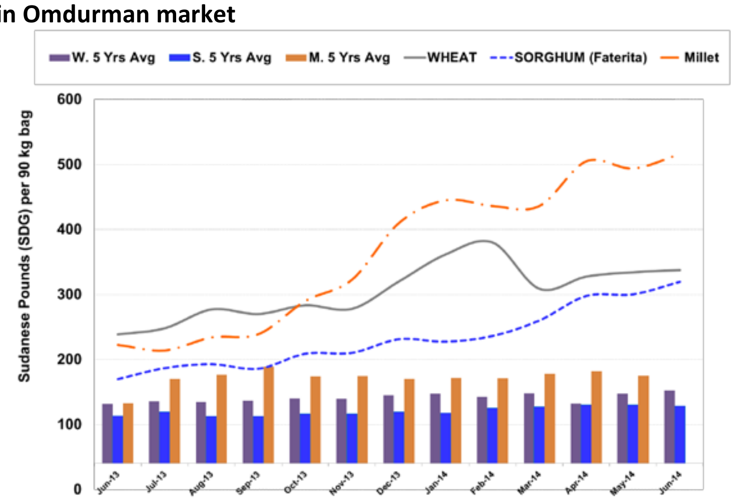


Source: Sudan Central Bureau of Statistics

Sorghum and millet prices continue to rise during the peak of the lean season (Figure 4).

- June retail sorghum prices were, on average, 80 percent higher than last year and 120 percent above the five-year average. In June, sorghum prices were highest in North Darfur and Khartoum where a sack of sorghum retailed at 444 SDG in El Fasher and 427.5 SDG in Khartoum. The poultry and dairy industry has generated additional demand for sorghum in Khartoum. Increased prices of sorghum, used as feed, have resulted in higher poultry and milk prices.
- June **retail millet prices** were on average 95 percent higher than last year and 150 percent above the five-year average. Millet prices in June were highest in Khartoum where one sack retailed at 775 SDG, and in Damazin and Kadugli markets where a sack of millet sold for 700 SDG.

Figure 4: Cereal prices in 2013/14 compared to five-year averages in Omdurman market



Source: FEWS NET

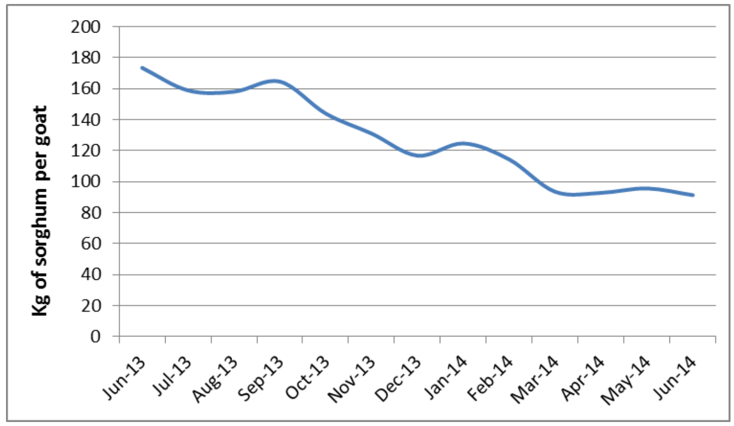
Goat to sorghum terms of trade continued to deteriorate in June (Figure 5). Terms of trade have declined by roughly 50 percent since last year, reflecting the extent to which cereal prices have outpaced livestock prices. Similar trends for terms of trade for daily wage labor and firewood to sorghum have been observed across Sudan.

South Sudan Crisis and Impacts on Sudan

The crisis in South Sudan has had the following impacts in Sudan:

- **South Sudan exploration of crude oil and export via facilities in Sudan has declined by 35 percent since December 2013, from 245,000 barrels per day to 160,000 in July 2014.** Crude oil production in Unity and Upper Nile, South Sudan has drastically declined. Export fees collected for the use of Sudan's pipeline and port facilities is a major source of foreign currency. Continued disruption of oil production in South Sudan will continue to compromise Sudan's capacity to sustain the national budget deficit, and prevent further inflation and devaluation of the Sudanese Pound.
- **Civil insecurity and heavy rains in June/July reduced road accessibility and obstructed trade flow between Sudan and South Sudan.** Civil insecurity in South Sudan disrupted formal and informal exports to South Sudan. Many trade routes and markets remain closed in conflict-affected areas. The few trade corridors that did remain open (West Sinar to Eastern Upper Nile, and East and South Darfur to Northern Bahr el Ghazal) have become inaccessible during the rainy season, further limiting trade.
- **Refugee arrivals from South Sudan to Sudan continues, but slowed over the month of June.** By the end of June 2014, an estimated **88,000** refugees arrived in Sudan since December. About 65 percent of the refugees have received humanitarian assistance. Of the current South Sudanese refugee population, about 45 percent are in White Nile State, 30 percent in Khartoum, 16 percent in South Kordofan, four percent in Blue Nile and four percent in West Kordofan State.

Figure 5. Terms of trade, sorghum to goat, Khartoum



Source: FAMIS-FSTS and FEWS NET

National Assumptions

The most likely scenario for July through December 2014 is based on the following national-level assumptions:

The **June to September main rainy season** in Sudan is likely to be near normal in terms of cumulative rainfall, with an increased likelihood of below-average rains during the second half of the season in eastern and central parts of the country, including in some of Sudan's main cereal production areas like Gadaref, Sinar, Blue Nile and White Nile states, where roughly 75 percent of farming is rain-fed. Below-average rains are also likely in Darfur and North Kordofan, regions prone to erratic rainfall and drought. Rainfall in September is a crucial for crop development, particularly for sorghum and millet and below-average rainfall could affect sorghum and millet production. Localized flooding along the Nile River is likely in August, given forecasts of above-average rains in Sudan and the Ethiopian Highlands.

Cereal prices will continue to rise during the first half of the scenario period and will peak in August/September. As harvests become available in October, prices will begin seasonal decline, but are expected to remain well above average. Although millet and sorghum prices should decrease during the October to January harvest period, traders will likely begin re-stocking large quantities of cereals early because of expectations of below-average production. As a result, prices are not expected to decline as they typically do and expected to remain well above average (Figure 6).

Figure 6. Projected retail prices for September and December 2014 using integrated analysis in areas of concern

		Observed data					Projection range		% Change between projection and average		
Commodity	Market	5 yr avg for June	5 yr avg for Sept	5 yr avg for Dec	June 2013	June 2014	Sept 2014*	Dec 2014*	June 2014	Sept 2014	Dec 2014
Sorghum	Gadaref	132	127	138	162	329	300 - 380	270 - 340	150%	162%	116%
Sorghum	El Fashir (N.Darfur)	190	160	190	259	445	460 - 560	390 - 480	134%	220%	128%
Sorghum	Nyala (S.Darfur)	199	154	167	243	400	415 - 505	350 - 430	101%	199%	134%
Millet	Nyala (S.Darfur)	270	257	276	392	661	685 - 835	580 - 710	145%	195%	134%

Conflict between government and opposition forces in South Sudan is expected to continue. Disruptions to oil production in South Sudan are expected to continue and production levels may decrease further. Continued reductions in oil exports are likely to affect Sudan's national budget. Shrinking foreign exchange reserves will keep inflation high. Further devaluation of the Sudanese Pound is also expected. Migration of South Sudanese refugees to White Nile, South Kordofan West Kordofan and Blue Nile states is expected to continue. FEWS NET estimates the number of refugees could grow from 88,000 in July to 120,000 by December.

Despite attempted peace talks to end conflict in South Kordofan and Blue Nile under the mediation of the African Union (AU), conflict between SPLM-N and Government of Sudan (GoS) is likely to continue. Peace talks between SPLM-N and GoS initiated by the African Union are indefinitely on hold and sporadic fighting between SPLM-N and SAF is ongoing. Conflict will continue to restrict humanitarian access in SPLM-N controlled areas and limit civilian movements and trade flows.

Sporadic tribal conflict and fighting between Darfur rebel groups and SAF are likely to continue in some parts of Darfur. Tensions between farmers and pastoralists usually increase during the main cultivation season from July to December because cattle grazing can destroy crops in agricultural areas. Cattle raids are also frequent during this time. Insecurity due to tribal clashes and fighting between SAF and Darfur rebel groups is expected to limit access to fields by IDPs.

Very high levels of acute malnutrition are expected to persist from July to September, during the remainder of the lean season. Results from a nutrition survey conducted by the Federal Ministry of Health and UNICEF during the same period last year revealed high levels of global acute malnutrition (GAM), defined according to weight-for-height Z scores <-2 in areas of concern. Last year's poor harvests, prohibitive food prices, displacement and insecurity have reduced household access to food. Given the increased morbidity of waterborne diseases (e.g. malaria, diarrhea) during the rainy season, high background levels of malnutrition and the extended lean season this year, FEWS NET anticipates an increase in the prevalence of GAM in areas of concern through September. Nutritional status is expected to improve with the availability of harvests in October.

Most likely food security outcomes

Acute food insecurity will peak from June to September. A gradual improvement in food security conditions is likely by the beginning of October as harvests become available. Food security typically worsens with the progression of the lean season from June to September, as household food stocks run out and households increase market dependence. Many households exhausted food stocks from own production early this year because of below-average 2013/14 harvests and increased reliance on market purchase for food earlier than normal. Cereal prices continue to sustain record-high levels and are expected to continue rising through the pre-harvest period. FEWS NET assumes prices will reach levels of 160 and 200 percent above the five-year average across most of Sudan. As a result, purchasing power of poor households will continue to weaken. Food security is likely to improve as the harvests begin in October with increased availability of food from own production. Household income from the sale of cash crops and seasonal agricultural labor will strengthen purchasing power. The food insecure population is expected to decline as harvests begin, from 5.3 million people during the peak lean season in August/September to 3.7 million people in October. However, if 2014/15 harvests are below average, improvements in food security may be less than anticipated or last only in the short-term.

Food security outcomes are expected to be the worst in SPLM-N controlled areas of South Kordofan, where an estimated 40 percent of IDPs and poor host communities are likely to remain in Emergency (IPC Phase 4) food insecurity from July to September. From October to December, conditions are expected to improve to Crisis (IPC Phase 3) for IDP households and to Stressed (IPC Phase 2) for host communities. An estimated 65 to 70 percent of the 400,000 people displaced during the first half of 2014 in North and South Darfur will remain in Crisis (IPC Phase 3!) during the peak of the lean season through September, and improve to Stressed (IPC Phase 2!) from October to December. Other areas of concern are North Kordofan, South, West, East and North Darfur states; and SPLM-N controlled areas of Blue Nile where Crisis (IPC Phase 3) food insecurity is anticipated among IDPs and poor host communities from July to September, and Stressed (IPC Phase 2) between October and December.

AREAS OF CONCERN

South Darfur

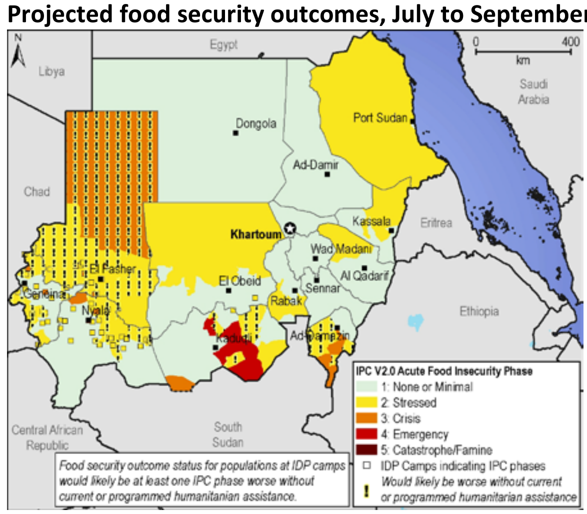
Current Situation

Food security has deteriorated in South Darfur since the beginning of the lean season in April. Poor 2013/14 harvests resulted in a food balance sheet deficit of an estimated 45 to 50 percent of the state's annual cereal requirements. Households depleted stocks from own production by February/ March, 3 to 4 months earlier than normal, causing earlier than normal market dependence for most households.

Renewed conflict in South Darfur displaced 258,000 people during the first half of 2014, doubling the size of the displaced population in South Darfur since conflict began 12 years ago. These populations have arrived in camps that already host roughly 500,000 people as a result of conflict in Darfur since 2002/03. The majority of IDPs in South Darfur have been in camps for 5 to 10 years (long-term IDPs), and others for 2 to 4 years (medium-term IDPs). The large-scale displacement in 2014, has disrupted livelihoods of new IDPs and caused additional strain on the already fragile food security situation among existing IDP populations.

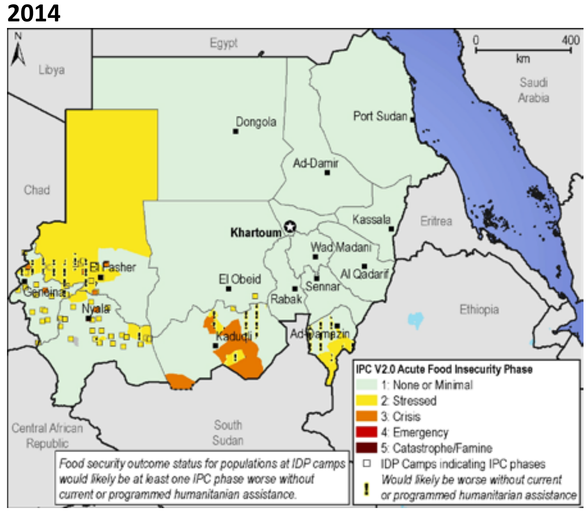
Rainfall was below-average in South Darfur in July. Despite the early onset of rains in some parts of the state during April/May, cumulative rainfall was below-average by the end of July. Nyala received roughly 50 mm of rain during the first dekad of July, about 50 percent of average. Rainfall during the second dekad of July was between 20 and 50 mm below the short- term mean. The eMODIS Normalized Vegetation Difference Index (NDVI) for the second dekad of July shows negative anomalies for much of South Darfur, indicating drier-than-normal vegetation conditions. Famers started planting in the last week of June

Projected food security outcomes, July to September 2014



Source: *FEWS NET*

Projected food security outcomes, October to December 2014



Source: *FEWS NET*

These maps represent *acute* food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect *chronic* food insecurity.

and will continue through mid-July, although dry conditions are likely to affect crop germination. Significant reductions in area planted, up to 50 percent, are expected due to seed shortages and insecurity that has limited access to fields for planting, especially for IDPs.

As a result of reduced supplies of cereals to markets and increased demand, **cereal prices continued to increase atypically in Nyala since last January.** Destruction of food stocks and interruptions in trade flows as a result of conflict and insecurity have also put upward pressure on staple foods prices, further exacerbated by increased transport costs and the deteriorating macroeconomic climate. **Grain prices have more than doubled in South Darfur since last year and are currently the highest in the country.** In June, the price of millet—the main staple food in Darfur—was 161 percent higher than last year and 236 percent above the five-year average. Sorghum prices were 157 percent higher than last year and 200 percent above the five-year average. Moreover, conflict has caused several markets to shut down across South Darfur, further limiting market access for households, at a time when market purchase is the main source of food.

The disruption of livelihoods and loss of assets as a result of conflict and displacement, combined with persistent cereal price increases have reduced household capacity to meet minimum food requirements. Households displaced in 2014 are the worst affected, and currently rely on market purchase and humanitarian assistance for food. Distributions of 25 percent emergency food rations to new IDPs by the World Food Program (WFP) are ongoing. Income sources are extremely limited for new IDPs, and most depend on casual labor opportunities in order to purchase food on markets. Even with humanitarian assistance, new IDPs currently face an estimated 20 to 25 percent food consumption deficit and currently face Crisis (IPC Phase 3!). Food security outcomes are worse for IDPs that have been unable to register for humanitarian food aid.

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about South Darfur State:

Rainfall

Most parts of South Darfur receive on average, 250 to 400 mm of cumulative rainfall annually, although rains are typically erratic. Forecasts for an EL Nino—typically associated with below-average rains in Sudan—suggest an increased likelihood of below average rains in South Darfur when crops are at critical development stages.

Conflict

Given the failure of peace talks between conflicting parties in Darfur, conflict between Darfur rebel groups and SAF is expected to continue from July to December. Inter-tribal fighting and fighting between pastoralist and sedentary farmers is expected to escalate from July to December. Ongoing conflict is likely to cause additional, but sporadic displacement in the coming months.

Area Planted

Significant reductions in area planted in South Darfur are expected for the July to August main cultivation season as a result of high levels of civil insecurity, significant displacement, and seed shortages. Ongoing fighting is likely to prevent IDPs from returning to their villages to cultivate. Some opportunities to lease land from host communities exist. However, land availability close to IDP camps is limited and many IDPs cannot afford land leases and the cost of inputs. FEWS NET expects that 50 to 60 percent of new IDPs will miss the cultivation season this year. Seed shortages across Darfur will also reduce area planted for all household groups. As a result, FEWS NET assumes that area planted in South Darfur will be 30 to 35 percent of normal.

Food sources

Given the heavy reliance on market purchase for food, significant reductions in income sources, and prohibitive cereal prices, access to food for IDPs is likely to remain limited through September. Access to food is expected to improve as harvests become available in October, although displacement and insecurity have reduced household capacity to cultivate this year. Opportunities for seasonal labor during the harvest are expected to improve access to cash income cereal prices are expected to decline. Thus, increased availability of food from own production and on markets is expected to improve access to food for IDP households during the harvest period starting in October. Access to livestock products is expected to improve due to improved pasture and water conditions, although benefits for IDPs will be limited since many lost livestock to looting or sold animals to buy cereals. Access to wild foods (especially green leaves) will improve during the rainy season, but will not be sufficient to compensate the staple food deficit of IDPs.

Production

Ongoing conflict and insecurity is expected to reduce agricultural activities, in addition shortages of seeds and other agricultural inputs. New IDPs are expected to cultivate only small plots of land or not at all. Given expectations of significant reductions in area planted and reduced crop yields as a result of below average rains, FEWS NET assumes that overall production in the 2014/15 will be significantly below average.

Staple food prices

Sorghum and millet prices will likely continue to rise during the peak of the lean season through September. FEWS NET anticipates further price increases for sorghum and millet in South Darfur by an additional 10 to 15 percent from July to September. Prices will begin seasonal decline in October but are expected to remain roughly 135 percent higher than the five-year average.

Income sources

Access to agricultural labor opportunities during the agricultural season are expected to be below normal given the high level of civil insecurity in South Darfur and reduction in area planted. Therefore, opportunities for agricultural labor during weeding (July to September) and harvesting (October to December) are expected to be well below normal. Moreover, increased labor supply in areas where IDPs have settled is expected to depress wages and decrease opportunities for casual labor. Because markets have closed and trade flows remain constrained, opportunities for petty trade are also expected to decline. Some seasonal improvements to income from the sale of cash crops is likely with early harvests in October, but will be limited by reductions in area planted.

Food aid

Food aid distributions for IDPs by the World Food Program (WFP) are expected to continue through December at current levels.

Nutrition

Malnutrition tends to be higher during the lean season with greater food consumption deficits and increased susceptibility to waterborne diseases like malaria and diarrhea during the rainy season. Although recent nutrition for South Darfur was unavailable, a nutrition survey conducted during the 2013 lean season reported an average GAM prevalence of 18 percent in South Darfur, and 29 percent in Al Salam locality, one of worse affected by recent conflict and displacement. Due to reduced availability and access to food sources for households in South Darfur in 2014, in addition to other aggravating factors related to conflict and displacement, including the interruption of health services, FEWS NET assumes current levels of malnutrition to be at least as high or higher than last year and anticipates increased levels of acute malnutrition through September.

Most likely food security outcomes

Based on the assumptions above, the following food security outcomes are expected from July to December:

New IDPs: Households displaced in 2014, are the most acutely food insecure population in South Darfur. Although the **m**ajority of new IDPs currently receive 25 percent food rations, the majority of households will remain unable to meet their minimum food requirements for survival, and will be in Crisis (IPC Phase 3!) during the peak of the lean season through September. Food security is likely to improve to Stressed (IPC Phase 2!) during the October to December harvest period.

Long-term and medium-term IDPs: The majority of the nearly 503,000 medium- and long-term IDPs residing in camps South Darfur will continue to receive 50 percent food aid rations through December and will face difficulty covering remaining food requirements. FEWS NET assumes **at least 40 percent of long-term IDPs will face Stressed (IPC Phase 2!) from July to December.**

Poor residents and host communities: The combination of high food prices, deteriorating terms of trade, reduced purchasing power and limited access to wild foods will result in considerable food consumption gaps. Most households will be unable to meet their minimum food requirements without engaging in irreversible coping strategies and very poor households are likely to face food consumption deficits of about up to 20 percent. WFP has started seasonal support of 50 percent cereal rations to main areas of concern in South Darfur through August mitigating further deterioration of food security outcomes. FEWS NET assumes over 30 percent of poor residents and host communities are currently Stressed (IPC Phase 2!). Food security will improve with harvests in October from stressed (IPC Phase 2!) to Minimal (IPC Phase 1) food insecurity from October to December.

North Darfur

Current Situation

Escalation of conflict and attacks on villages has resulted in the displacement of 200,000 people from their home villages since February. Households have fled to camps in North Darfur, where nearly 500,000 IDPs have settled since conflict began in 2003. In many cases, those displaced in 2014 lost their homes during active fighting and household assets including livestock. Large-scale displacement in 2014 has put additional stress on the already fragile and precarious conditions for longer-term IDPs currently living in camps and largely dependent on humanitarian assistance. Conflict and displacement have resulted in widespread loss of assets, including household food stocks and livestock and disrupted livelihoods. IDP households are currently unable to meet minimum food needs and face considerable food consumption gaps.

Cereal prices continued to soar across all markets in North Darfur. Millet prices continued to increase across all markets in North Darfur since the beginning of 2014. Current millet prices in EL Fasher are almost double last year's prices and 150 percent above the five-year average. Sorghum prices also continued to increase in North Darfur. Sorghum prices in June in El Fasher were 72 percent higher than last year and 135 percent above the five-year average.

Onset of 2014/15 agricultural rainy season. Rainfall has been sporadic in eastern and southern parts of North Darfur since the start of the rainy season. Farmers in relatively secure areas have started planting in the southern and eastern parts of the state. Because of insecurity, many displaced households are not expected to cultivate this year. Field reports also suggest reduced planting due to seed shortages. Many households lost seed stocks and inputs during conflict or did not have enough stocks from own production to plant, and cannot afford seeds on local markets. Seeds distributed by the government and humanitarian partners have been insufficient to cover seed requirements in North Darfur.

Assumptions

In addition to the national assumptions described above, the following assumptions have been made about North Darfur State:

Conflict

Security conditions are likely to remain tense during scenario period. It is likely that fighting will continue between SAF/RSF and rebel groups in Darfur, and in North Darfur in particular. The strong presence of RSF in different parts of the state will continue to threaten civil security, increase tension, and limit household access to income. As a result of the new displacement and the restricted movements of populations within areas of relative stability, heightened competition for farming and grazing areas is expected to cause further conflict between tribes and between farmers and pastoralists. IDPs are not likely to return to their home villages in the coming months and new displacement is anticipated.

Staple food prices

Millet and sorghum prices will continue to increase during the peak of the lean season through August. Prices are likely to further increase by 5 to 10 percent across most markets in July and August. Further deterioration of livestock to cereal terms of trade and labor to cereal terms of trade is likely to continue through September. With the expected availability of early maturing crops, millet prices are likely to stabilize or slightly decrease in September. Prices are expected to decrease by 10 to 15 percent during the October to December harvest period, as households increase dependency on own production and/or in-kind payments from agricultural labor and reduce market purchase. Cereal prices are nevertheless expected to remain substantially higher than average.

Rainfall
Most parts of North Darfur are desert and semi-desert zones characterized by low annual rainfall, frequent drought and poor harvests. Forecasts for July to August indicate an increased likelihood of near-normal to below-normal rainfall over most parts of North Darfur with an estimated 30 percent probability for below-average rains.

Production
Significant reductions in area planted are expected across North Darfur as a result of ongoing conflict and displacement and seed shortages. Given expectations for below-average rains in parts of North Darfur and reduced area planted, 2014/15 production is likely to be below-average.

Food sources
The majority of households in conflict-affected areas lost food stocks during conflict, and insecurity has limited access to wild foods. Deteriorating livestock to cereal terms of trade highlight the weakened capacity of households to obtain cereals through market purchase and further deterioration in terms of trade is expected. Households displaced in 2014 will continue to rely almost entirely on food assistance and support from relatives and host communities from July to September. Marginal improvements in access to food sources are expected starting in October, although food deficits are expected to persist. Food from own production for IDPs and resident households in areas affected by conflict is expected to be well below average, up to 50 percent of normal. Some agricultural labor opportunities will become available during the harvest period, improving household capacity to purchase food. Food assistance to new IDPs is expected to remain erratic while long-term IDPs will continue to receive 50 percent rations through December.

Income Sources
Wage labor, cash crop and livestock sales, remittances, and traditional gold mining were the major sources of income for households in conflict-affected areas of North Darfur. Displacement, insecurity and loss of assets have significantly reduced households' ability to access income. Constrained access to farms is expected to limit agricultural income opportunities and reductions in area planted across North Darfur are expected to reduce income from the sale of cash crops. Significant reductions in income opportunities have resulted in stress sales of livestock, further reducing households' capacity to respond to food price shocks and disruptions to livelihoods. Given expectations of sustained conflict, income sources are expected to remain constrained, especially for recently displaced households.

Most Likely Food Security Outcomes

Reductions in food and income sources are expected to result in significant food consumption deficits from July to September, especially for households displaced in the last six months. Above-average and increased sale of livestock to purchase cereals is expected. Although slight improvements in food availability and access are anticipated in the October to December harvest period, food deficits are expected to persist among IDPs and conflict-affected host community households, even with humanitarian assistance. As a result, the majority of new IDPs and conflict-affect resident households in North Darfur are expected to remain in Crisis (IPC Phase 3!) through December. Because of relatively better access to food and income sources for longer-term IDPs, in addition regular food assistance delivery (50 percent rations), these households will likely continue to face Stressed (IPC Phase 2!) acute food insecurity from July to September.

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
All Sudan	Average rainfall in main surplus producing areas of Central and East Sudan	Average rains will likely result in better than expected harvests and subsequently, normal access to food from own production in relatively secure areas, income from cash crop sales, and normal access to seasonal agricultural labor. Normal supply of grain to markets and a decline in prices would also improve access to food from markets during the harvest period. Thus, food security outcomes from October to December would be better than expected.

Areas in Darfur affected by recent conflict	Decline in conflict and stabilization of civil security	Improvement in the overall security situation would enable better access to farms and other livelihood sources and encourage new IDPs to return to home villages. If this occurs, projected food insecurity for new IDPs and resident households in conflict-affected areas will be better than expected and improve to Stressed (IPC Phase 2!) acute food insecurity.
All Sudan	Worsening crisis in South Sudan causes complete suspension of oil production	The loss of national revenue from oil exports could lead to austerity measures that withdraw subsidies from strategic commodities (e.g. wheat) which would likely result in the further rise in food prices. Intensified fighting in South Sudan could also increase refugee migration from Upper Nile and Unity states, increasing strain on host communities.
Areas of South Kordofan and Blue Nile affected by conflict	Peace talks between GoS and SPLM-N lead to the implementation of a ceasefire agreement.	If conflict subsides, improved humanitarian access and increased food aid delivery would improve food security outcomes for IDPs in SPLM-N controlled areas from Emergency (IPC Phase 4) to Crisis (IPC Phase 3) and/or Stressed (IPC Phase 2).

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.