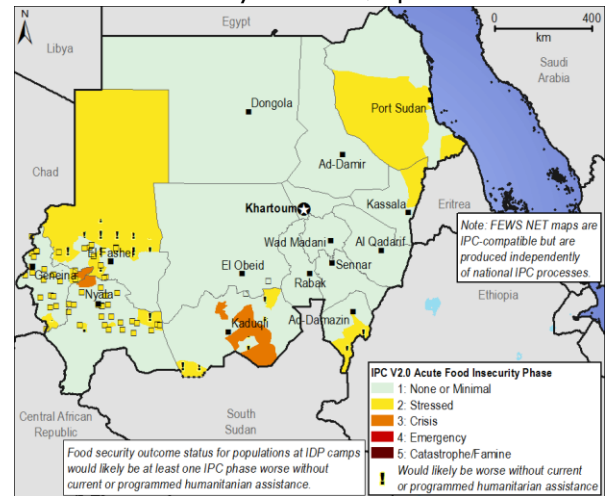


Escalating conflict in Darfur and South Kordofan continues to limit access to food for the poor

KEY MESSAGES

- As of April 2015, an estimated 3.7 million people in Sudan face Crisis (IPC Phase 3) and Stressed (IPC Phase 2!) levels of acute food insecurity. Current food insecurity in Sudan is the result of conflict in Darfur, South Kordofan, Blue Nile and West Kordofan. Food insecurity in some parts of east Sudan is mainly due to limited purchasing power. The size of the food insecure population is likely to reach 4.2 million during the July to September peak lean season.
- Intensified hostilities between SAF and armed-rebel groups in South Kordofan, Darfur, Blue Nile and West Kordofan, and tribal conflict in some parts of Darfur, displaced thousands of people, caused loss of life and assets, interrupted livelihood activities, and disrupted access to markets and humanitarian assistance.
- An outbreak of measles has been declared in 31 localities of 14 states in Sudan. Out of the 3,015 suspected cases, 1,697 are confirmed. So far, confirmed measles cases were almost four times greater than last year. A large-scale vaccination campaign by FMOH, UNICEF and WHO is in progress, but not likely to reach insecure areas, where immunization against measles is likely to remain low.

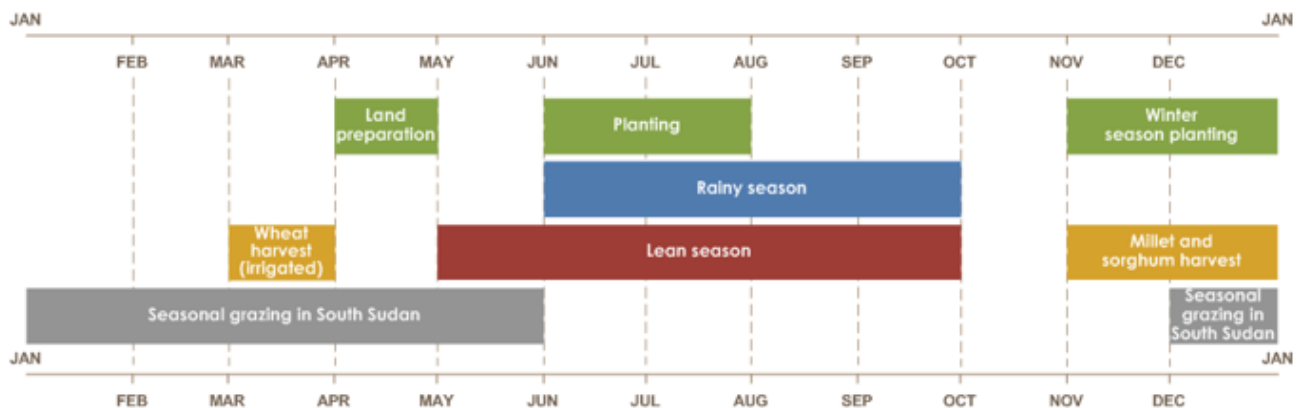
Current food security outcomes, April 2015



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/IPC for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

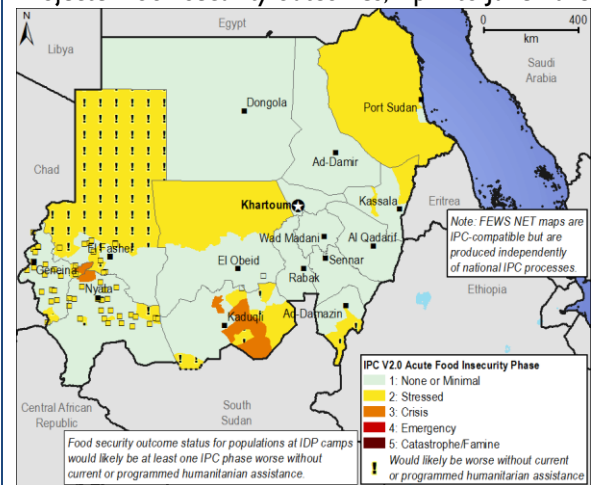
Current food insecurity is mainly caused by conflict in Darfur, South Kordofan, West Kordofan and Blue Niles states. As of April 2015, an estimated 3.7 million people in Sudan faced Crisis (IPC Phase 3) and Stressed (IPC Phase 2) levels of acute food insecurity. Most of these are conflict affected people in Darfur, South Kordofan, West Kordofan and Blue Nile states, with additional pockets of IPC Phase 2 acute food insecurity in the sparsely populated North Kordofan and Red Sea states. About 70 percent of current food insecure people were in Darfur, 15 percent in South Kordofan, 5 percent in Blue Nile state, 4 percent in Red Sea state, 3 percent were South Sudanese Refugees in White Nile, South Kordofan, Khartoum, West Kordofan and Blue Nile states, 2 percent in Abyei area and 1 percent in West Kordofan state. Prevalence of Crisis (IPC Phase 3) level of food insecurity is mainly amongst IDPs in SPLM-N controlled areas of South Kordofan and new IDPs in Darfur due to insecurity that have had led to displacement, loss of assets, disrupted livelihood activities and disrupted access to markets and humanitarian assistance.

National elections were peaceful in most parts of the country, but caused an upsurge in conflict between Sudan Armed Forces (SAF) and armed rebel groups in South Kordofan, Blue Nile and Darfur. Voter turnout for presidential and parliamentary elections was generally low, about 42 percent according to preliminary results. Voting was suspended in the border areas of EL Dibat in West Kordofan state, North Abyei, and seven constituencies in South Kordofan State due to rising tensions and insecurity. An upsurge in violence was reported in South Kordofan where the Sudan People's Liberation Movement-North (SPLM-N) increased mortar attacks in Kadugli and Dilling towns. Since the third week of March, an estimated 24,000 people were displaced to EL Abassiya, Abu Jubaiha and Rashad towns and surrounding areas. Fighting between SAF and the SPLM-N in Habila town during the last week of March forced about 13,000 people to flee their homes. Most of these households have since returned to Habila according to the Humanitarian Aid Commission (HAC). HAC also reported an additional 26,000 people fled northern Jebel Mara, Central Darfur following an escalation of fighting there.

Widespread tribal conflict displaced nearly 20,000 people in North, South, and East Darfur since late March, mostly caused by competition over natural resources and cattle theft. Heavy fighting between Ziyadiya and Berti tribes in Mellit and Sayah localities in North Darfur state resulted in widespread looting of livestock, destruction of homesteads, and disruptions in market activity. Nearly 10,000 people were displaced to surrounding areas, according to humanitarian agencies. Similar tribal conflict between Salamat and Falata tribes in Dimso and Tulus localities in South Darfur displaced 1,800 people to Katayla locality in South Darfur. Inter-tribal fighting between Ma'alia and Rezeighat tribes in Abu Karinka locality in East Darfur since early April displaced about 6,200 people to Adila and Abu Karinka localities in East Darfur state.

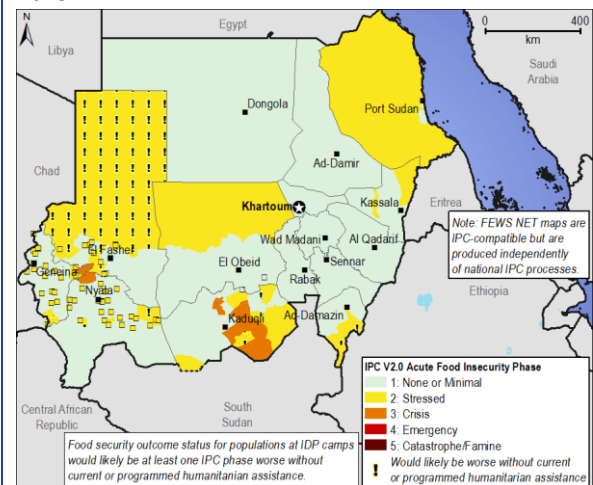
Despite deteriorating security conditions, the World Food Program (WFP) and its partners distributed emergency food assistance to newly displaced people in government-controlled areas of South Kordofan. In March, WFP and its partner organizations distributed 105.5 tons of emergency food aid to 14,400 people in Al Abassiya, Aby Jubaiha and Rashad localities

Projected food security outcomes, April to June 2015



Source: FEWS NET

Projected food security outcomes, July to September, 2015



Source: FEWS NET

These maps represent acute food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect chronic food insecurity. Visit www.fews.net/IPC for more on this scale.

of South Kordofan recently displaced by violence. Humanitarian agencies have not been able to access new internally displaced persons (IDPs) in Central Darfur due to security and restrictions .

A measles outbreak occurred in 14 states in the first quarter of 2015, with the largest number of cases reported in recent years. By the first week of April, the Federal Ministry of Health (FMoH), UNICEF and WHO reported a measles outbreak in 31 localities of 14 states. Over 1,500 cases have been confirmed with an additional 3,000 suspected cases. The number of new cases confirmed since the beginning of year 2015 was almost four times greater than the total number of confirmed cases in 2014 and 60 percent greater than 2014. The majority of cases were recorded in Darfur and other conflict-affected areas, where large portions of the population have not been immunized and Crisis (IPC Phase 3) and Stressed (IPC Phase 2) of food insecurity persist. Measle perceived an aggravating factor to food insecurity that will increase probability deaths of malnourished children. UNICEF and WHO is supporting the government in a country-wide mass immunization campaign targeting 8 million children, which started in the last week of March.

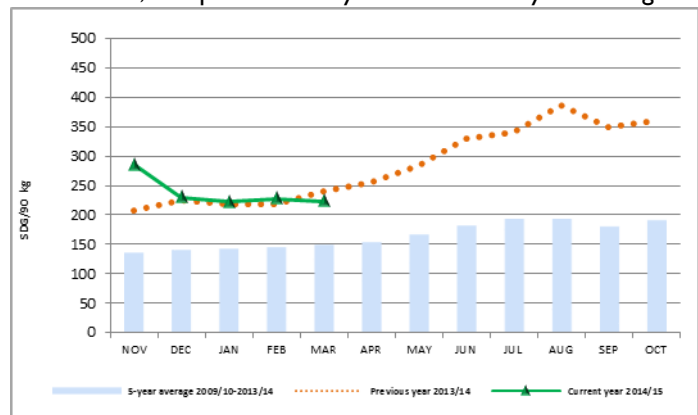
Staple food prices either remained stable or slightly decreased between February and March, in-line with seasonal trends. Adequate market supplies and low household demand kept sorghum prices stable in most markets. Prices decreased by 9 percent in El Obied and by 5 percent in Damazine. Sorghum prices increased by 5 percent in El Fasher due to conflict-related disruptions to trade. On average, sorghum prices in March declined by 10 to 25 percent compared to last year but remain 70 percent above the five-year average. Similar trends were observed for millet prices, which were on average, 5 to 10 percent lower than last year and 75 percent above the five-year average. Prices of domestic wheat started to decline seasonally in March with the start of wheat harvest. Direct purchase of wheat by the Strategic Reserve Corporation (SRC) at a fixed price of 400 Sudanese Pounds (SDG) per sack is likely to prevent sharp declines in wheat prices despite surplus production this year. Current price levels for wheat are 33 percent higher than last year and 77 percent above the five-year average.

National inflation increased slightly from 23 percent to 23.2 percent between February and March 2015. The official exchange rate remains stable since January at 6 SDG per 1 USD compared to 9 SDG per 1 USD in the informal market.

Wage labor to sorghum terms of trade (ToT) declined seasonally in March (Figure 2). In Gadaref and Zalingi markets, daily wages declined due to the seasonal decrease in demand for agricultural labor. On average, daily wages declined by 13 percent in March while sorghum prices remained relatively stable. Between February and March, daily labor wages to sorghum ToT in Gadaref declined by 23 percent and are slightly lower than last year.

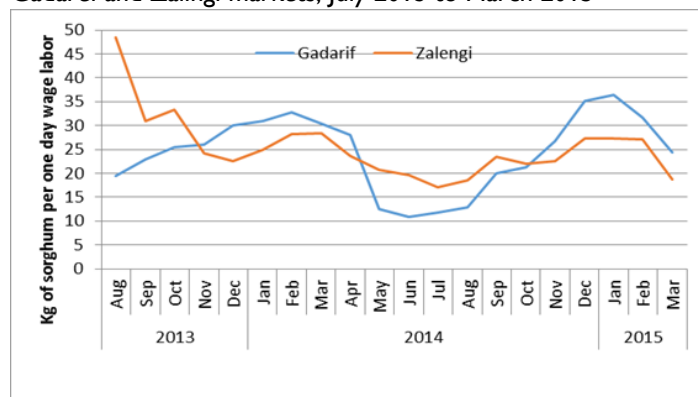
Over 130,000 refugees from South Sudan have migrated to Sudan since December 2013. As of mid-April, a total of 131,226 refugees from South Sudan have been registered by UNHCR in Sudan; of these about 15 percent arrived during the first quarter of 2015. About 57 percent of new arrivals have settled in White Nile state, 25 percent in Khartoum, and 12 percent in South Kordofan. In April, an average of 1,500 South Sudanese refugees were arriving in Sudan per week. An estimated t 60 percent of refugees have received humanitarian assistance.

Figure 1. Sorghum prices in Gadaref market from January to March 2015, compared to last year and the five-year average



Source: FEWS NET/FAMIS

Figure 2: Daily wage labor to sorghum terms of trade in Gadaref and Zalingi markets, July 2013 to March 2015



Source: FEWS NET/FAMIS

Assumptions

From April to September 2015, the projected food security outcomes are based on the following national key assumptions:

- The current escalation of conflict between SAF and armed opposition groups in South Kordofan, Darfur and Blue Nile states is expected to continue during the remaining months of the dry season and will likely decline in July during the rainy season.** FEWS NET assumes continued hostilities between SAF and the armed rebel groups, in addition to inter-tribal fighting in South Kordofan, Darfur and Blue Nile states, at least during the dry season through June. Conflict will subside from July to September during the rainy season due to reduced mobility of troops and military equipment. Conflict is expected to cause large-scale population displacement in North, East and South Darfur, South Kordofan and Blue Nile states. FEWS NET assumes between 250,000 to 300,000 people are likely to be displaced in these areas over the course of 2015.
- Seasonal upward trends in staple food prices are expected from July to September.** Despite above-average harvests of the previous agricultural season in Sudan, staple food prices are likely to start to increase gradually from April to September across all markets due to the expected seasonal reduction of market supplies and increased demand during the June to September lean season. Price levels are likely to remain similar to last year and well above the five-year average due to high inflation, local currency depreciation and high production costs.
- Daily labor wages will follow seasonal trends, declining through June and gradually increase from July to September.** The projected increase of staple food prices will likely outpace the daily labor wages during the scenario period. Daily wage labor to cereal ToT will likely be in favor of staple food prices, reducing purchasing power of the poor.

Own production access to food from the above-average harvest of 2014/15 is gradually depleting and poor households are increasingly shifting to market purchase. By June, most poor households will have exhausted stocks from own production and shift to market purchases - typical during the lean season. Above-average carry-over stocks of cereal traders, commercial farmers and better-off households will improve access to markets for food compared to previous years, especially in the drought prone areas of Red Sea, Kassala, North Darfur and North Kordofan states.
- The influx of refugees from South Sudan is expected to continue.** Given the conflict in South Sudan is expected to continue and is getting closer to border areas with Sudan, FEWS NET assumes the influx of South Sudanese refugees to White Nile, South Kordofan, Khartoum, Blue Nile and West Kordofan will continue through the scenario period. FEWS NET assumes the total number of South Sudanese refugees in Sudan since December 2013, will reach 200,000 by end of year 2015.
- The June to September main rainy season is likely to be near-average.** The IGAD Climate Prediction and Applications Centre (ICPAC)'s consensus for March to May 2015 rainy season indicated average to above-average rainfall in southern and western Sudan. FEWS NET assumes timely, near-average June to September rains across Sudan. Planting is expected to begin normally in June/July with near-average area planted in areas unaffected by conflict.

Most Likely Food Security Outcomes

Improved food security conditions as a result of above-average 2014/15 harvests in relatively secure areas of Sudan are expected through the end of the post-harvest period in May 2015. June marks the beginning of the lean season this year, which is one month later than normal. The number of food insecure people in drought prone areas of Red Sea, Kassala, North Kordofan, White Nile and North Darfur states is expected to decline to levels below the five-year average due to improved access to food and income sources. Thus, Minimal (IPC Phase 1) food security is likely to persist in most areas of Sudan unaffected by conflict from May to June. By the beginning of the lean season in June, the number of food insecure people is likely to increase from current 3.5 million people to 4 million people and could peak to 4.2 million food insecure people in August/September 2015.

Despite above-average 2014/15 national production, acute food insecurity likely to persist in conflict-affected areas of South Kordofan, Blue Nile and Darfur states due to limited access to income generating opportunities, restricted access to humanitarian assistance, disrupted access to cultivation and markets, and lack of basic health services. An estimated 25 to 30 percent of IDPs in SPLM-N controlled areas of South Kordofan will continue to face food consumption gaps and remain in Crisis (IPC Phase 3). Roughly 30 percent of IDPs in Darfur are expected to remain Stressed (IPC Phase 2!), but only with humanitarian assistance, through September 2015. Newly displaced households in these areas without access to humanitarian assistance are likely to face Crisis (IPC Phase 3) levels of acute food insecurity during the scenario period.

AREAS OF CONCERN

Tawilla Locality, North Darfur State

Current Situation

At the end of last year, the government of Sudan announced the start of a second round of its “Dry Season Offensive” to eliminate the insurgency in Sudan. This military campaign continued through January/February 2015, causing massive displacement in Tawilla. Since December 2014, an estimated 19,000 people have been displaced, increasing the IDP population in Tawilla by 50 percent. Currently, new displacement into Tawilla continues, but has begun to decline in recent weeks.

Total 2014/15 main season millet and sorghum production in North Darfur is estimated at 149,000 MTs, almost 115 percent higher than 2013/14 production and 37 percent higher than the 2009 to 2013 average, according to the North Darfur State Ministry of Agriculture (SMoA). Nevertheless, North Darfur still faces a aggregate cereal deficit of about 45 percent of annual cereal requirements. Tawilla locality is typically a deficit area, and thus dependent on food supplies from outside the area in order to meet local demand.

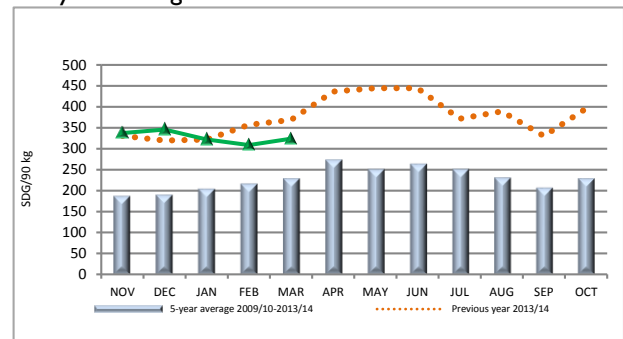
Insecurity and tribal conflict have accelerated the seasonal increase of cereal prices in main markets of North Darfur. Sorghum and millet prices increased between 5 and 13 percent from February to March, mainly in conflict-affected areas. Current levels of cereal prices are slightly below their 2014 levels but remained between 40 to 80 percent above the five-year average.

Terms of trade between wage labor—the main income source for most IDPs in Tawilla—and staple foods (millet and sorghum) in North Darfur increased by between 6 and 13 percent between February and March, following a significant drop in February (25 to 30 percent). This increase was mainly due to the increase in wages, coupled with cereal price stability in March. Wage labor to cereal ToT were slightly higher than March 2014 due to relatively lower food prices and higher wages this year compared to last year (Figure 4).

Assumptions:

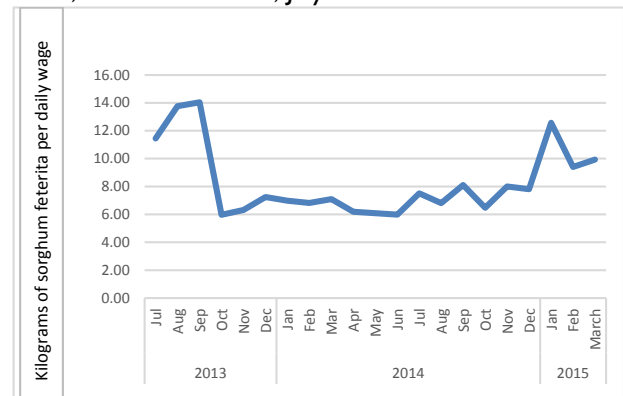
In addition to the national-level assumptions specified earlier, this Outlook makes the following assumptions for newly displaced people in Tawilla locality of North Darfur in particular:

Figure 3. Sorghum prices in El Fasher market from Nov. 2014 to to March 2015, compared to last year and the five-year average



Sources: FEWS NET/FAMIS

Figure 4. Agricultural wage labor to sorghum terms of trade, El Fasher Market, July 2013 to March 2015



Sources: FEWS NET/FAMIS

- **Conflict between government and rebel groups and inter-tribal tensions are likely to escalate in most parts of Darfur, and in North Darfur in particular, during scenario period**, given the ongoing second “Dry Season Offensive” and the recent fighting between Berti and Al-Zayadia tribes in Mellit locality about 50 kilometers Northwest of El Fasher. FEWS NET assumes that in a most-likely scenario, ongoing conflict is likely to displace an additional 5,000 to 10,000 people in Tawilla and surrounding areas from April to September.
- **Sorghum and millet prices are expected to increase by 10 to 15 percent from April to September.** Prices are likely to peak during the June to September lean season due to the combination of increased reliance on market purchase as a main food source and the seasonal decline in market stocks. Conflict is likely to reduce trade and staple food supply to Tawilla and other areas of North Darfur.
- **Access to food and income sources will remain below-average.** Conflict will continue to limit access to agricultural labor in Tombac (chewing Tobacco) farms as well as food crops farms, particularly for IDPs. Insecurity is also likely to continue to limit access to wood and charcoal collection and sale. Reduced income and above-average food prices will reduce food access for poor and displaced households.
- **Most IDPs in Tawilla are not likely to cultivate during the main agricultural season for the second consecutive year.** Most IDPs, especially those displaced in the last year, will not be able to return to their homes for cultivation and will have limited or no access to land during the upcoming planting season.
- **New IDPs in Tawilla are likely to continue to receive monthly food assistance either through food voucher or in-kind food distribution.** Conflict-affected populations will likely continue to receive 25 to 50 percent food rations during the scenario period. Access by humanitarian agencies and regular delivery of food assistance is likely to be disrupted by prevailing insecurity situation.

Most Likely Food Security Outcomes

The combination of disruptions to trade and reduced market supply, above-average and increasing staple food prices, reduced income generating opportunities, and loss of assets due to conflict and displacement is expected to cause a deterioration in food security from April to September. IDPs in Tawilla, and in most areas of Darfur will be able to meet minimum food needs from April to June, but only due to the presence of humanitarian assistance and will remain in Stressed (IPC Phase 2!). **Food security will deteriorate as the lean season peaks from July to September to Crisis (IPC Phase 3) for new IDPs in Tawilla, although this will not change the overall classification for North Darfur.**

Western Jebel Mara/Nertiti locality of Central Darfur State

Current Situation

More than 35 percent of the Nertiti locality population was displaced by conflict in recent years. As of April 2015, about 71,285 people were displaced over the course of the more than decade-long conflict in Darfur. This represents 35 to 40 percent of the total population in Nertiti locality. Nertiti town alone hosts about 40,451 IDPs. Since early 2015, heavy conflict between SAF and Darfur armed rebel groups in Jebel Mara has caused new waves of displacement in Nertiti locality, particularly in Guldo Town, where 16,300 people have been displaced, according to inter-agency assessments in late March. In February, 4,300 IDPs arrived in Guldo, and 12,000 in March. Households displaced in March have not yet received humanitarian assistance.

Production in 2014/15 was above average due to increased area planted and favorable weather conditions. Cereal production in Central Darfur was estimated at 314,245 MTs, more than double last year’s production and 160 percent higher than the three-year average. The food balance sheet of central Darfur for the 2014/15 consumption year was projected to have surplus cereal production of about 89,991 MTs. Similar trends were reported for cash crop production. Cereal prices declined in recent months but conflict continues to interrupt market functioning and trade flow.

Despite the above-average harvest of 2014/15 agricultural season in Central Darfur, and ongoing food aid distributions to protracted IDPs during the harvest period, results from the Food Security Monitoring System (SFSM) assessments during the

harvest period in November 2014 indicated 45 percent of IDPs with borderline FCS and 6 percent with poor FCS. This level of FCS indicated slight improvement compared to average FCS of the same period for the last five years.

Assumptions:

In addition to the national-level assumptions specified earlier, this Outlook makes the following assumptions for displaced populations in Nertiti locality of Central Darfur in particular:

- Inter-tribal conflict will likely continue during the rainy season due to atypical livestock migration and grazing on farmland and cattle theft/raiding, which is likely to cause destruction of crops, loss of assets, burning of villages and new displacement. FEWS NET assumes 15,000 to 20,000 people will be displaced from Western Jebel Mara during the scenario period. In addition the rising hostilities will continue to erode households' asset base, disrupt livelihood activities, and reduce access to markets and cultivation.
- Emergency food assistance to protracted IDPs and new IDPs will continue through the scenario period, although assistance delivery will remain constrained by humanitarian access restrictions in rebel held areas of Jebel Mara. Access will continue to decline from June to September due to increased transport inaccessibility during the rainy season.
- Below-average access to cultivation and seasonal agricultural labor for IDPs is expected during the rainy season due to insecurity and increasing number of IDPs.

Most Likely Food Security Outcomes for protracted IDPs in Nertiti locality

The projected rise in staple food prices, in combination eroded assets, and reduced access to income sources due to conflict and displacement will constrain access to food through market purchase during the June to September peak lean season. Assuming the current levels of food assistance will continue through the scenario period and the projected livelihoods disruption will remain at same level, about 30 percent of protracted IDPs in Western Jebel Mara likely to face 5 – 10 percent food consumption deficit during the scenario period. The expected seasonal increase of expenditure on health and education likely to generate an income deficit during the second half of the scenario period. Consequently, Stressed (IPC Phase 2) levels of food insecurity likely to persist among at least 30 percent of the 71,285 protracted IDPs through the scenario period. A majority of new IDPs in conflict affected areas without access to humanitarian assistance are likely to face Crisis (IPC Phase 3) levels of food insecurity.

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 | Above-average June to October rainy season that will result in above average harvest | Above average harvest of 2015/16 agricultural season will be the second consecutive above-average harvest in Sudan and will improve food availability and access and above average access to seasonal agricultural labor by poor households during the scenario period. The outcome of this would be improved food security conditions of majority of poor households to Minimal (IPC Phase 1) by the starting of the harvest in October 2015. |
| SPLM-N controlled areas of South Kordofan and rebel held areas in Darfur | Improved access to these areas by humanitarian agencies. | Distribution of food and non-food humanitarian assistance in these areas will improve food security of IDPs and host communities from Crisis (IPC Phase 3) to Stressed (IPC Phase 2!). |
| Tribal conflict affected areas of Darfur | Reconciliation between conflicting tribes in Darfur. | Reduced tribal conflict in Darfur will enable tribal conflict affected households to return to their original villages and recover their |

| | | |
|------------------------------------|---|--|
| | | normal livelihood activities, most importantly access to cultivation over the due June to October rainy season. |
| Conflict affected areas in Darfur | Improved security situation in Darfur | This likely to lead to substantial access to cultivation and agricultural wage labour, markets and humanitarian assistance. Food and income sources for IDPs and poor households considerably improved and the food security situation becomes similar to normal. |
| Conflict affected people in Darfur | Further increase of violence and state of lawlessness across wide areas in Darfur | This will increase level of tribal conflict more than expected and massive displacement of people to existing IDP camps and relatively secure areas of Darfur. This is likely to result in complete failure of livelihoods and coping strategies of new IDPs in Darfur and lead to deterioration in food security situation. |

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. To learn more about this approach to scenario development, visit www.fews.net/scenario_development.