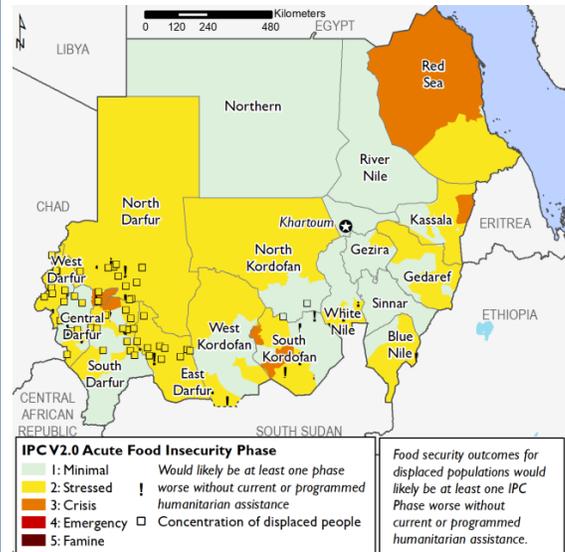


Well above average staple food prices expected to drive high 2019 assistance needs

KEY MESSAGES

- The November-December main season millet and sorghum harvest is ongoing in Sudan and production is anticipated to be average. Rainfall during the June to September season was well above average and supported favorable crop yields across the country. Such rainfall performance would typically lead to an above-average harvest, though macroeconomic issues over the past year have negatively impacted both the planting and harvesting of crops.
- Sudan continues to face macroeconomic challenges and a shortage of hard currency, and the Sudanese Pound has further deteriorated to 70 SDG on the parallel market in December. Food prices are already 150-200 percent above average and are expected to increase to 200-250 percent above average during the 2019 lean season, reducing household food access.
- Food security improvements during the November to February harvesting period will be less significant than in typical years as many poor households obtain some or most of their food needs from market purchases even during the harvesting period. Between March and May 2019, food security will deteriorate as poor households begin to deplete household food stocks and become even more dependent on markets. Many areas will be Stressed (IPC Phase 2), while much of North Darfur, Jebel Marra, Red Sea, and parts of West Kordofan, North Kordofan, South Kordofan, Blue Nile, Kassala, will be in Crisis (IPC Phase 3).

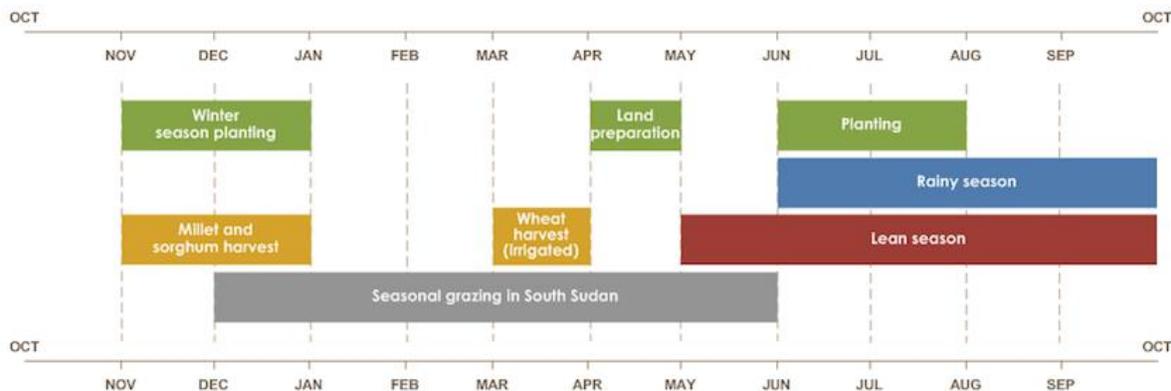
Current food security outcomes, December 2018



Source: FEWS NET

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

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

The November-December main season millet and sorghum harvest is ongoing in Sudan. Rainfall during the June to September season was well above average and supported favorable crop yields across the country, with the exception of isolated areas where prolonged dry spells or flooding occurred. Although such rainfall performance would typically have led to an above-average harvest, macroeconomic issues over the past year have negatively impacted both the planting and harvesting of crops, and production is estimated to be average as a result.

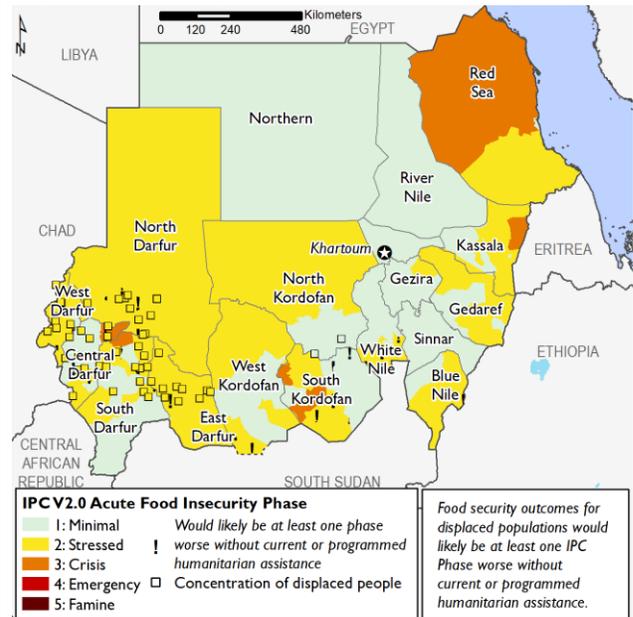
In late 2017, the Government of Sudan began to implement significant changes to their economic policy in response to persistent, long-term difficulties accessing foreign exchange. Among these changes were the removal of subsidies for wheat and wheat flour imports and devaluation of the Sudanese Pound (SDG) from 6.7 SDG/USD to 30 SDG/USD in February 2018. By mid-2018, at the start of the agricultural planting season, fuel shortages were occurring, and this led to lower area cultivated in some parts of the semi-mechanized areas.

By October 2018, Sudan further devaluated its currency to 47.5 SDG/USD, though by early December it had depreciated to 70 SGD/USD on the parallel market. The continued shortage of hard currency and the rapid depreciation of the SDG have significantly reduced the private sector and government’s ability to import essential raw materials, including fuel. Consequently, the ongoing harvesting period is also being negatively impacted by low fuel supply and high prices, particularly in central and eastern semi-mechanized areas. Additionally, the high price of agricultural labor and the fact that farmers have prioritized sesame and groundnuts production is expected to result in delayed harvesting and some crop losses of sorghum and millet.

Preparations for the November to March winter season, which is the key season for wheat production in Sudan, started earlier than normal. Despite early preparations, farmers are raising concerns that the high cost of seeds, fertilizers, fuel, and the cash shortage are all preventing normal planting. The Ministry of Agriculture has set a target of 700,000 feddans cultivated, to result in an estimated 947,000 MT of winter wheat production. Approximately 65 percent of the target is within government-irrigated schemes in Al Jazeera and Halfa, while the remaining 35 percent is small scale cultivation in Northern, River Nile, White Nile, and Sennar States. Given the above-mentioned macroeconomic concerns, it is unlikely this target is being met.

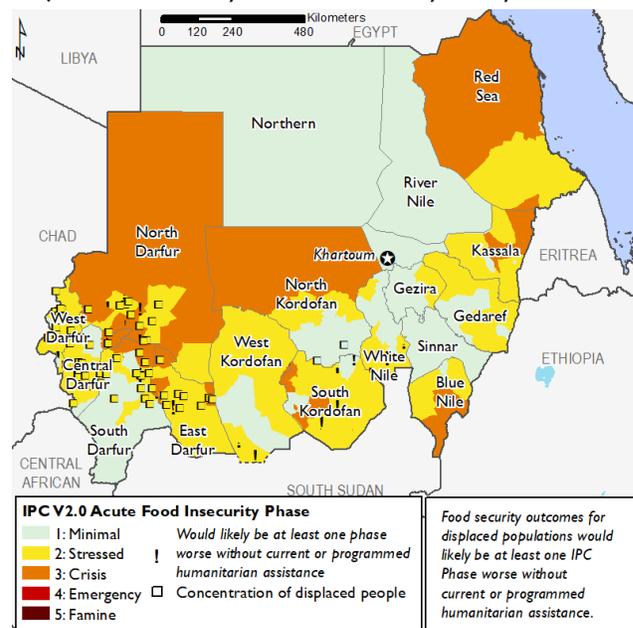
The ongoing macroeconomic issues are also driving high prices for food and non-food items. The shortage of hard currency is constraining the capacity of the government and private sector to import agricultural inputs, medicines, and wheat grain among other commodities. Wheat flour shortages have been reported across the country, and prices of food and non-food

Projected food security outcomes, December 2018 to January 2019



Source: FEWS NET

Projected food security outcomes, February to May 2019



Source: FEWS NET

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

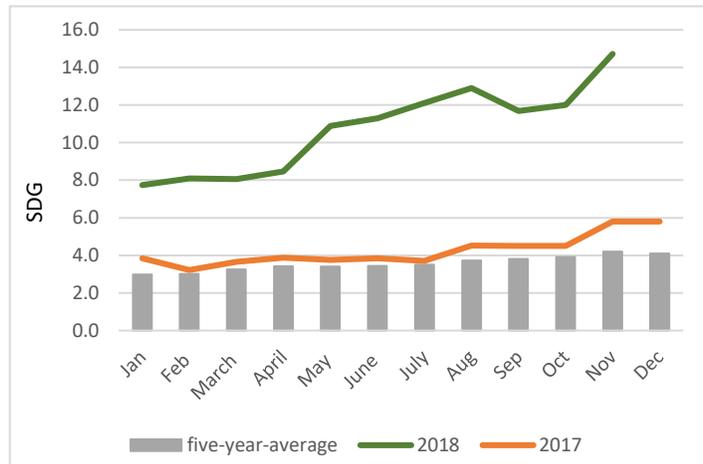
items have increased by 40-60 percent since October. The cost of transportation, which has increased 80 to 90 percent from last year, is contributing to higher commodity prices. According to the Central Bureau of Statistics (CBS), the national inflation rate was 68.9 percent in November 2018, compared to 24.8 percent in November 2017 and a five-year average of 27.1 percent.

The retail price of locally-produced main staples, namely sorghum and millet, are upwards of 160-230 percent above average as a result of the currency devaluation and high transport costs (Figures 1 and 2). Prices started to decline seasonally or remained stable with increased supply from the harvest, between August and October in most markets, though several markets saw unseasonable price increases in November. The retail price of locally-produced wheat is similarly high, at 135 percent above 2017 prices and 210 percent above the five-year average. Between October and November, the retail price of wheat has either remained stable or slightly increased as market supplies from March/April 2018 winter season harvest seasonally decline and macroeconomic challenges are resulting in lower volumes of wheat imports.

Although livestock and wage labor prices are also increasing, the rate of increase is less significant. Livestock prices have increased as a result of the devaluation of the SDG, as well as seasonally due to favorable livestock body conditions. Furthermore, high demand for local consumption and export of livestock continues to put upward pressure on prices. Despite this, livestock price increases are lower than the increase of cereal prices. In October, local goat prices were on average 90 percent above last year and 180 percent above average. Currently, the goat-to-sorghum terms of trade (ToT) are 25-50 percent lower than of same period last year (Figure 3) and 20-35 percent lower than the three-year average.

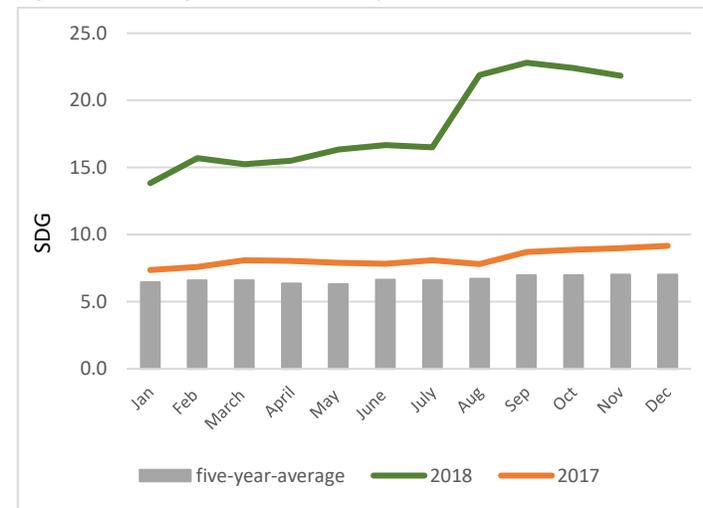
Agricultural labor wages have significantly increased during the harvesting period, though these increases are also smaller than staple food price increases. The increase in labor wage rates is driven by the fuel shortage and high fuel prices, which has driven high demand for labor as an alternative to machinery in semi-mechanized areas. Furthermore, laborers are demanding high wages as they face high staple food prices. Labor wages in November almost doubled compared to May 2018 and are about 170 percent above last year and the recent three-year average. Given relatively higher cereal prices, though, the labor wage-to-sorghum ToT across key markets are either similar to, or 25-30 percent lower than, last year and

Figure 1. Retail prices of sorghum, El Obeid



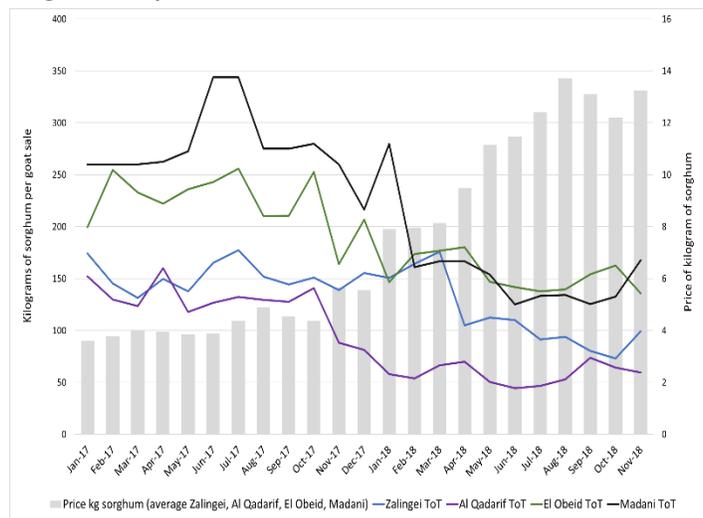
Source: FAMIS/FMoA data

Figure 2: Retail price of wheat sorghum, Gadarif



Source: FAMIS/FMoA data

Figure 3: Goat-to-sorghum terms of trade versus retail price of sorghum in key markets

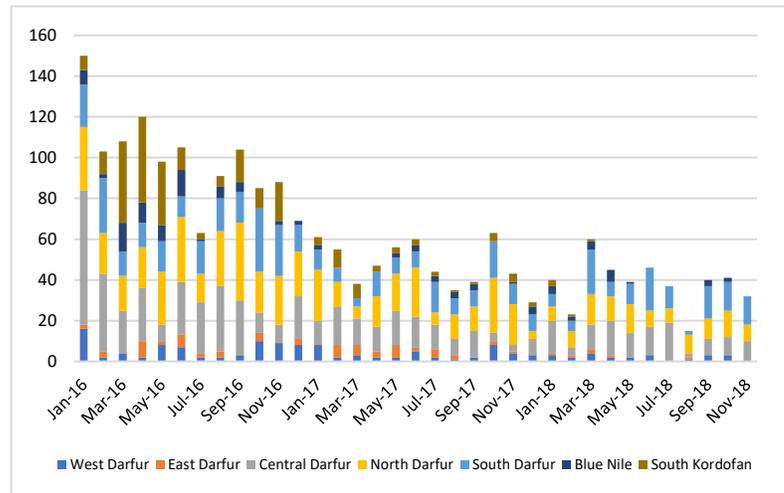


Source: FAMIS/FMoA data

three-year average. Furthermore, the high cost of labor is expected to increase the cost of wheat production during this season.

The security situation has remained relatively calm in the main conflict-affected areas of South Kordofan, Darfur, and Blue Nile states since the declared unilateral ceasefires by the Government of Sudan and main armed rebel groups in 2017, and the number of monthly conflict incidents has declined notably (Figure 4). Subsequently, new displacements have significantly reduced in 2018 compared to earlier years of higher conflict. The exception is Jebel Mara in Darfur where fighting between the Sudanese Armed Forces (SAF) and the Sudan Liberation Army – Abdel Wahid (SLA-AW) persists and some 15,000 to 20,000 people have been newly displaced during the first half of 2018.

Figure 4. Conflict incidents in Darfur, Blue Nile, and South Kordofan



Source: ACLED data

According to the International Organization for Migration (IOM), the majority of verified and registered new IDPs in Darfur were from Golo and Rokero areas in Central Darfur State. The Humanitarian Aid Commission (HCAC) of the Government of Sudan reports that the number of IDPs across Sudan has reduced from 2.3 million in 2017 to about 1.6 million as in November 2018, most of whom are protracted IDPs in Darfur. The relatively improved security situation and the favorable rains in 2018 has encouraged some IDPs to return to their areas of origin in Darfur and government-controlled areas of South Kordofan and Blue Nile states for cultivation. IOM reported the return of about 108,450 IDPs to their areas of origin in 2018.

The influx of South Sudanese refugees into bordering states of Sudan continues due to ongoing conflict and acute food insecurity in South Sudan, though the number of new arrivals recorded in October 2018 was the lowest monthly arrival rate in 2018, and it is expected this is due in part to the September 2018 signed peace deal in South Sudan and slight reduction in conflict. According to UNHCR, an estimated 764,400 South Sudanese refugees are residing in Sudan as of November 2018, of whom 30,420 arrived in 2018.

In October 2018, WFP provide food assistances to about 3.8 million beneficiaries in Sudan through distribution of 111,096 MT of assorted food commodities and cash-based transfers of 22.6 million USD. 57 percent of beneficiaries were IDPs, 12 percent were South Sudanese refugees, and 31 percent were residents in drought- and conflict-affected areas. It is expected this assistance is improving food security outcomes among beneficiaries; however, data on humanitarian assistance deliveries at the administrative level is not available and it is therefore not possible to determine where food security outcomes are likely at least one phase better due to humanitarian food assistance.

Food security has improved across much of the country in December with increased availability of food from local harvests. However, macroeconomic issues are driving worse outcomes than are typically seen during this time and many areas are Stressed (IPC Phase 2). In areas where poor households are highly dependent on markets to access food – either typically or because they experienced poor production this year – Crisis (IPC Phase 3) outcomes exist. These areas include much of North Darfur and Jebel Marra, parts of West Kordofan, North Kordofan, and South Kordofan, southern Blue Nile, northern Kassala, and much of Red Sea.

Assumptions:

The December 2018 to May 2019 most likely scenario is based on the following national-level assumptions:

- Based on FEWS NET’s integrated projection, it is expected the Sudanese Pound (SDG) relative to the USD will remain within the range of 60-75 SDG/USD during the first quarter of 2019. No new, significant sources of USD revenue are likely in the short-term; although increased USD earnings are possible with indications that South Sudan could further increase oil production, from which Sudan receives pipeline and refinery fees, this revenue is expected to be negligible on the value of the SDG in the short to medium term.

- Fuel shortages are expected throughout the projection period at levels similar to current shortages, and prices of fuel are expected to be well above average. It is likely farmers in mechanized and semi-mechanized areas will be given priority to purchase fuel at official subsidized price, though many will not be able to purchase sufficient fuel due to shortages.
- The November to February main harvest is expected to be near average; although favorable rainfall led to high yields, the area planted was somewhat below average and harvesting activities face constraints due to macroeconomic issues include cash and fuel shortages and high labor prices. Prolonged dry spells also affected a few areas.
- Given the relatively shorter period of time for planting in the winter season relative to the main season, areas not cultivated on time are unlikely to be cultivated for the season. As a result, it is unlikely area targeted will be reached, though current cultivation is in line with average, and therefore average production is likely.
- Similarly, land preparation in April/May 2019 for 2019/2020 season is expected to be constrained by the continuing macroeconomic difficulties, and area cultivated is expected to be lower than normal.
- Based on FEWS NET's integrated price projections, the retail price of sorghum and millet in key markets are anticipated to decline 5-10 percent between November and February, the post-harvest period, and begin increasing after April to levels similar to our slightly above current prices. Overall, local cereal prices are expected to be 50-100 percent above last year and 210-240 percent above the five-year average.
- Local goat prices, which are currently around 150 percent above average, are expected to remain relatively stable, though prices will decline slightly at the August-September peak of the lean season when market supply increases as households sell additional livestock to fund food purchases. Overall, goat prices are expected to remain 70-80 percent above last year and 150-180 percent above the five-year average.
- Based on the above, goat-to-cereal terms of trade are expected to remain 20-30 percent lower than last year and 40-60 percent below the five-year average.
- Agricultural labor opportunities are expected to be slightly lower than normal. Daily wage rates have nearly doubled compared to the same time last year as labor demand higher wages among rising prices. While many are still expected to work a typical number of days, some farmers will be unable to afford typical levels of labor and total opportunities will be lower than normal. Labor wages are expected to remain near current rates, at 100-150 percent above average. However, given that cereal price increases are somewhat more significant, labor-to-sorghum terms of trade are expected to remain slightly below average.
- Following the declaration of ceasefire in South Kordofan, Blue Nile, and parts of Greater Darfur in December 2017, conflict has been relatively lower in 2018 and this is lower level of conflict is expected to continue throughout the projection period. As a result, the scale of new internal displacement is expected to be lower than in 2017. The exception to this is in Jebel Marra of Darfur where frequent clashes between Government troops and the Sudan Liberation Movement – Abdel Wahid (SLM-AW) are expected to persist and lead to new displacement and disruption of typical livelihoods. Overall, the number of displaced people in Sudan is expected to remain around 2.1-2.5 million.
- Further new arrivals of refugees from South Sudan are expected throughout the projection period, albeit at lower rates than last year based on trends of lower influx in recent months. Overall, the number of South Sudanese refugees in Sudan is expected to be between 700,000 and 800,000.
- Based on WFP's Operation Plan for humanitarian food assistance from November 2018 to May 2019, it is expected 3.8 million beneficiaries will be reached with 126,555 MT of food assistance and 22,395,000 USD worth of CBT. The majority of beneficiaries are IDPS in Darfur.

Most Likely Food Security Outcomes:

December 2018 to January 2019 is the main harvesting period in Sudan and food security outcomes typically improve for most poor households during this time due to a combination of access to food and income from own harvests, in-kind payments from agricultural labor, and improved purchasing power due to seasonal declines of staple food prices. However, this year food security improvements will be less significant and short lived, despite the average harvest in most areas. This

is due to the persistent macroeconomic challenges that are expected to continue throughout the projection period. Many poor households obtain a portion of their food needs from market purchases even during the harvest and with below-average purchasing power, they will face difficulty purchasing normal levels of food and non-food items. As a result, many areas will be Stressed (IPC Phase 2) during this time, while much of North Darfur and Jebel Marra, parts of West Kordofan, North Kordofan, and South Kordofan, southern Blue Nile, northern Kassala, and much of Red Sea will be in Crisis (IPC Phase 3). There has been no recent nutrition survey data in the country. The November 2017 national Mid-Upper Arm Circumference (MUAC) screening showed recorded Global Acute Malnutrition (GAM) by MUAC of more than eleven percent in North Darfur, Red Sea, South Kordofan, Blue Nile, and Central Darfur states, indicative of Crisis (IPC Phase 3) or Emergency (IPC Phase 4) outcomes.

Between March and May 2019, food security will deteriorate somewhat in most areas as poor households begin to deplete household food stocks from the harvest and become seasonally dependent on markets. Based on the assumption that livestock and casual labor wages will not keep pace with staple food price increases, households will face below-average purchasing power throughout the projection period and difficulty purchasing sufficient food to meet their basic needs. Furthermore, poor households also faced high prices throughout 2018 and the further food price increases are expected to erode the capacity of households to cope through sustainable means. More areas are expected to face Crisis (IPC Phase 3) outcomes within North Darfur and North Kordofan, southern Blue Nile, northern Kassala and northern South Darfur states. Between March and May, Critical level of acute malnutrition (GAM (WHZ)>15%) is likely in several areas including those identified as having a MUAC around 11 percent in November 2017.

Of greatest concern are IDPs and poor households in SPLM-N controlled areas of South Kordofan and IDPs and conflict-affected households in Jebel Marra in Darfur. Food security among these populations has improved from the Emergency (IPC Phase 4) outcomes at the peak of the 2018 lean season to Crisis (IPC Phase 3) with the harvest, and they are expected to maintain Crisis (IPC Phase 3) through May. However, outcomes are likely to further deteriorate among these populations beyond the projection period, at the August/September peak of the 2019 lean season, to Emergency (IPC Phase 4).

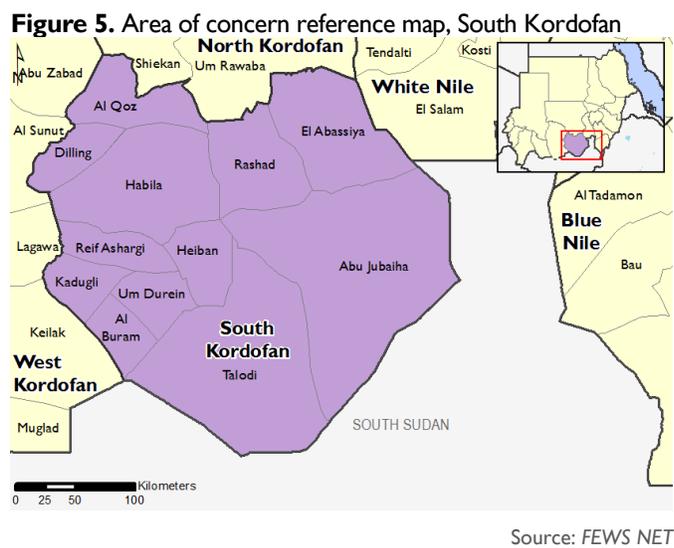
AREAS OF CONCERN

IDPs and poor households in SPLM-N-controlled areas of South Kordofan State (Figure 5)

Current situation

As of December 2018, an estimated 140,000 to 160,000 people are internally displaced in the SPLM-N controlled areas of South Kordofan State, the majority of whom reside in the main IDPs sites in Haiban, Al Buram, Um Dorain, El Reifalshargi, Al Dalanj, Kadugli, Taludi, and Lagawa localities. Most of the households residing in these IDP settlements have been displaced since the beginning of the conflict in 2011/12.

The security situation has remained relatively calm across most of the SPLM-N controlled areas of South Kordofan since the declaration of the unilateral ceasefire by the government of Sudan (GoS) in January 2017. No incidents of direct fighting between SPLM-N and SAF been reported in the area through Mid-December 2018. Nevertheless, humanitarian access, free population movement, access to livelihood activities, and trade flows all remain fairly restricted. The GoS has extended the ceasefire through the end of 2018, given the start of peace talks between the government and main armed groups including SPLM-N.



The decline in conflict in 2018 has resulted in an increased number of returnees from SPLM-N controlled areas and refugee camps in South Sudan to government-controlled areas. According to the Humanitarian Aid Commission (HAC) of South Kordofan, between January and November 2018, approximately 30,000 individuals (5,600 households) have been registered

as returnees from SPLM-N controlled areas and refugee camps in South Sudan to their home villages into government-controlled areas. Among these returnees, an estimated 16,760 people (3452 households) returned from Al Buram, 9,414 people (1414 households) returned from Um Dorain, and 3,563 people (788 households) returned from Heiban.

Average June to September rains and relative stability during June to October cultivation period encouraged more IDPs to engage in planting this season compared to previous years of higher conflict; however, most of the cultivation among IDPs was limited to a *Jubraka* (home garden) and small plots adjacent to homesteads. The ability of this population to engage in cultivation remains lower than prior to their displacement due to limited access to land and inputs and some restrictions to movement. Available information from the area suggests that approximately 60 percent of IDP households in the area were able to cultivate and were harvesting early maturing-crops in November.

According to the preliminary findings of the state level post-harvest assessment carried out in November in South Kordofan, 2018/19 cereal production is estimated at 392,508 MT, near average but down from 483,399 MT for the 2017/18 season. It is anticipated the State's food balance sheet for 2018/19 consumption year will show a 83,730 MT cereal surplus, although this is 55 percent lower than the 130,135 MT of cereal surplus estimated the last year. Available information from SPLM-N controlled areas of South Kordofan suggests production is far below than that of the government-controlled areas and far below its level prior conflict.

Staple cereal prices have seasonally decreased in main markets in SPLM-N areas between September and October, and the retail price of sorghum decreased between roughly 10 and 30 percent in Thobo, Um Dorain Dallami, Western Kadugli and Heiban markets. This is mainly attributed to the increased market supplies from the new harvest both locally and from adjacent government-controlled areas. In Kadugli market, the key market in a government-controlled area adjacent SPLM-N controlled area, the retail price of sorghum in November was around 175 percent above last year and the five-year average. Prices in SPLM-N areas were slightly lower than the same period last year, a time in which prices were extremely high due to poorer cultivation and greater instability. However, prices remain extremely high in absolute terms and are between 60 and 160 percent above that of the government areas due to the high cost of transportation and restricted official trade flow. Meanwhile, the prices of non-cereal food items are 40 to 50 percent above last year and are over 250 percent above prices in the government areas.

Food security outcomes have improved from the lean season with the harvest, but many IDPs still rely heavily on market purchases to meet their basic food needs and with below average purchasing power and some shortages in market supplies, many face difficulties meeting their basic food and non-food needs. Crisis (IPC Phase 3) outcomes likely currently exist.

Assumptions

In addition to the national-level assumptions, the following area-level assumptions have been used to develop the most-likely scenario for IDPs in SPLM-N areas of South Kordofan for December 2018 through May 2019.

- Given the extended unilateral ceasefire and the peace talks between the government and main rebel groups including SPLM-N, the security situation is expected to remain relatively calm. Although no major incidents of direct fighting are expected during outlook period, tension is still expected between Sudanese Armed Force (SAF) and SPLM-N as well as between the two SPLM-N disputing factions.
- Despite the ongoing peace talks, it is unlikely a solution and implementation will occur during the outlook period such that humanitarian access to SPLM-N areas of South Kordofan is granted. Therefore, restrictions to humanitarian access and no humanitarian assistance deliveries are expected to be delivered into the area during the scenario period.
- Production in SPLM-N controlled areas during the 2018/19 season is expected to be higher than last year, but lower than pre-crisis levels. Access to wild foods will be average given favorable rainfall relatively improved security which is allowing for greater movement.
- Based on FEWS NET's integrated price projections, sorghum prices will remain over 90 percent above last year and over 180 percent above the five-year in Kadugli market. In SPLM-N controlled areas of South Kordofan prices will remain on average 170 to 180 percent above respective in government areas throughout the scenario period.
- Prices of non-cereal and other essential non-food items are expected to remain extremely high throughout the scenario period due to national drivers, including expected further depreciation of the SDG and fuel shortages, as well as local drivers including restrictions to trade flows from government-controlled areas to SPLM-N areas.

- Purchasing power will remain below average throughout outlook period due to the projected high sorghum prices. The goat-to-sorghum TOT in Kadugli market is likely to remain between 130 to 190 kg of sorghum for per goat, 15-25 percent lower than last year and 10-20 percent lower than the five-year average. Given higher food prices in SPLM-N controlled areas, the ToT are expected to remain lower in absolute terms.
- The forecasted near average harvest in government-controlled areas, the high demand for agricultural labor for the ongoing harvest and the relatively high wages are likely to avail better labor opportunities and better income for IDPs from the SPLM-N areas adjacent to accessible producing centers in GoS areas.

Most likely food security outcomes

Food security will be seasonally high between December 2018 to January 2019 as most IDP households are harvesting some crops, improving food availability and access. Furthermore, IDPs are able to earn in-kind payments from agricultural labor and assistance from the host community during the harvesting period, and these opportunities are expected to result in higher income than in past years as a result of improved opportunities from the relative calm. Consumption of wild foods will also be seasonally high during this time. However, harvesting of crops and labor opportunities are not available to all and it is expected these food and income sources will be insufficient to meet all basic food and non-food needs for many IDPs. Furthermore, these households will face atypically high food prices and market purchases are needed for households to meet their basic food needs. Although many will face Stressed (IPC Phase 2), a high percentage – estimated around 25 to 30 percent – of IDPs in SPLM-N controlled areas will be in Crisis (IPC Phase 3) during this time.

Food security will deteriorate after January as households exhausted limited harvests and staple food prices are expected to further increase, greatly reducing households’ capacity to purchase sufficient food. The lean season is expected to start between March and April 2019 and most IDPs will increase consumption of wild food, borrowing from relatives and limited market purchase and Crisis (IPC Phase 3) outcomes will persist during this time.

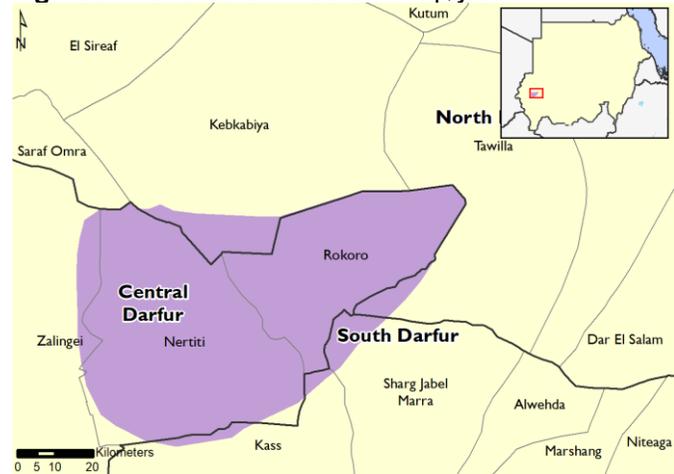
IDPs and conflict-affected households in Jebel Marra area of Darfur (Figure 6)

Current Situation

The mountainous area of Jebel Marra spans South, Central, and North Darfur and is controlled primarily by the Sudan Liberation Army led by-Abdelwahid el Nur (SLA-AW), the most active rebel group in the area. Persistent fighting between the SAF and the SLA/AW since mid-January 2016 has caused large-scale displacement within Jebel Marra. The majority of IDPs are located in displacement camps, though some are displaced in rural highlands. As of November 2018, an estimated 75,000-100,000 people are displaced in Jebel Marra, though this number is unverified given limited access to the area.

Despite the three-month unilateral cessation of hostilities declared by the GoS and SLA-AW in September 2018 to allow for humanitarian access, hostilities and sporadic fighting have continued in Jebel Marra of Central and South Darfur states, triggering additional displacement of thousands of civilians. In May 2018, fighting in Sina, Karo, Sabun El Fagur, Gubo, Kor Alnaqi, and Feina led to the displacement of an estimated 16,000 people to various camps and settlements in South and Central Darfur. 12,000 of these individuals were already considered displaced and the fighting led to their re-displacement, while 4,000 were newly displaced in the May fighting.

Figure 6. Area of concern reference map, Jebel Marra



Source: FEWS NET

The 2018/19 rainy season was generally favorable in most parts of Darfur; however, the prevailing insecurity and armed clashes, in particular between May and June 2018, displaced households away from farms and restricted other households’ access to farms, contributing to lower production during the 2018/19 agricultural season. In addition, heavy rains led to landslides in September and caused some crop losses. Production among those in Jebel Marra is expected to be relatively low,

though food availability has improved somewhat since October due to the ongoing harvest. Furthermore, market supplies are seasonally high given average production is expected in other parts of Central and South Darfur.

Staple food prices remained stable in Zalengi market of central Darfur, the main market in areas adjacent to Jabal Mara area, in October and November. This price stability is atypical, as prices typically decline during the harvesting period. The retail price of a kilogram of sorghum in Zalengi was 16 SDG in November, almost 160 percent above last year and 290 percent above the five-year average. In addition to the high cost of transportation currently due to fuel shortages and depreciation of the SDG, prices are even higher in Jebel Mara due to its remoteness from main production areas in Sudan. Furthermore, trade flows continue to be disrupted by insecurity, resulting in irregular supply of food and non-food items, further driving up prices.

The goat-to-sorghum ToT have declined 10 to 15 percent between June and November 2018, and currently the sale of a goat can purchase around 100 kg of sorghum, compared to 110 kg in June. This ToT is almost 45 percent lower than last year and 55 percent lower than the recent five-year average.

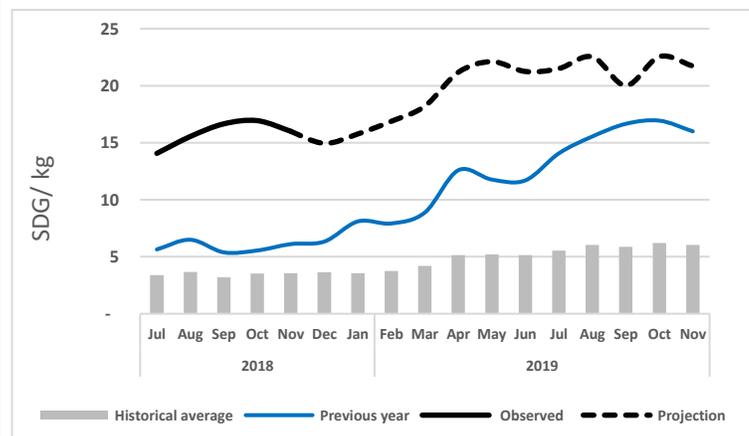
IDPs and conflict-affected people in Jebel Mara continue facing very limited access to their normal income sources such as production, sale of fruits and vegetables, sale of livestock, and petty trade due to the prevailing insecurity which is causing displacement, and restricting population movement and trading activities. As of November 2018, most IDPs have missed cultivation while access to agricultural labor, collection and sales of forest products remained limited due to the continued insecurity situation. As of November 2018, majority of IDPs and conflict-affected people in Jebel Mara maintains level of income far below the cost of their household’s essential requirements. Crisis (IPC Phase 3) outcomes are likely.

Assumptions

In addition to the national-level assumptions, the following area-level assumptions have been made to develop the most-likely scenario for IDPs and conflict-affected households in Jebel Marra of Darfur:

- Fighting between the SAF and SLM-AW is expected to continue during the outlook period, including sporadic attacks on civilians by armed militias. Additionally, clashes between pastoralists and farmers are likely, triggering further losses of assets and displacement.
- Market supplies of cereal will be seasonally high through February 2019 and will start to seasonal decreases in March. In isolated markets of Jebel Mara where insecurity significantly limits trade flows, market supplies of non-cereal food items and other essential non-food items are expected to be very low.
- Despite seasonally high cereal supply through May, staple food prices are not expected to decline during this time. Rather, they will remain some stable or slightly increase after December, driven by persistent depreciation of the SDG. Cereal prices are anticipated to remain 80 to 110 percent higher than last year and over 300 percent above average (Figure 7).
- The majority of IDP and conflict-affected households will rely heavily on the collection of wood and production of charcoal as in income source, as well as petty trade. However, access to the collection of these goods and markets for sale will occasionally be disrupted by the ongoing conflict. Access to agricultural labor will also be restricted by conflict. Overall, income from these sources will remain lower than pre-crisis years and volatile.

Figure 7. Integrated nominal price projection, retail sorghum (SDG/kg), Zalengi market, Central Darfur



Source: FEWS NET/FAMIS

Most Likely Food Security Outcomes

Food security will improve slightly through early 2018 for most households who were able to cultivate and who can access wild foods. However, not all households cultivated, and many will continue to rely on markets to access food, as well as wild foods. Low purchasing power throughout the projection period will result in lower than normal food access. Furthermore, continued conflict is expected to at times force households to flee their homesteads and current sources of food and income. Crisis (IPC Phase 3) outcomes are expected throughout the projection period in the absence of humanitarian food assistance, with most relying on the consumption of some cereal production, wild foods, and market purchases.

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table I. Possible events over the next eight months that could change the most-likely scenario.

| Area | Event | Impact on food security outcomes |
|--------------------------------|---|--|
| National | Greater depreciation of the SDG than currently projected and higher staple food prices than currently projected | Food security would deteriorate across the country with more households facing Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes. Although parts of North Darfur, parts of West Kordofan, North Kordofan, and South Kordofan, southern Blue Nile, northern Kassala, and much of Red Sea states would remain areas of greatest concern, food security would also deteriorate in other areas. |
| Jebel Marra area | Humanitarian access and delivery of assistance in Jebel Marra | Should IDPs and conflict-affected households in Jebel Marra have access to humanitarian assistances, it is expected food security outcomes would improve to Stressed (IPC Phase 2!) during the outlook period. |
| SPLM-N areas of South Kordofan | The ongoing peace talks to result in a peace deal that is fully implemented | It is expected this would in turn lead to improved humanitarian access and free trade flows. Greater trade would put downward pressure on prices. Households would also face increased ability to move and engage in livelihood activities. The population in Crisis (IPC Phase 3) would reduce and many would likely be Stressed (IPC Phase 2!) |

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)