NATIONAL MARKET PROFILE FOR SOUTH SUDAN

WFP South Sudan/VAM

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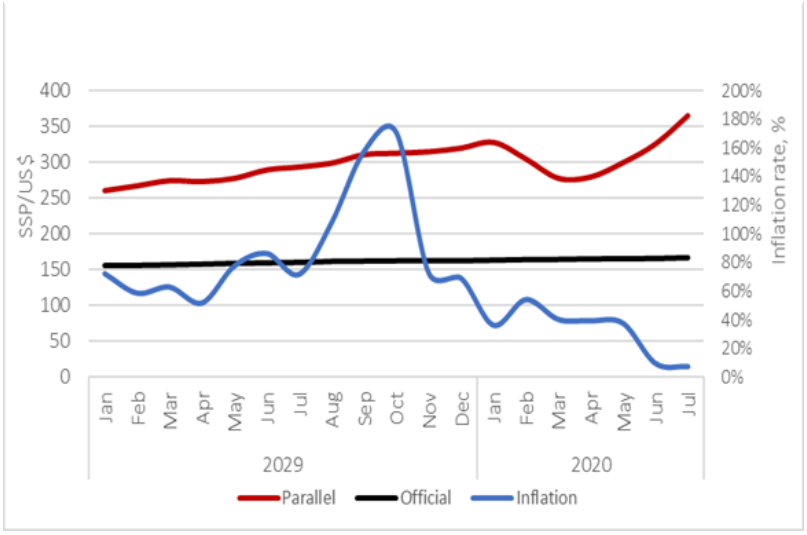
1. Macroeconomic situation

Oil production plays an important role in the economy of South Sudan, contributing slightly more than half of the GDP, 95 percent of exports, 90 percent of Government revenues. Since independence in 2011, oil production has steadily declined and has experienced frequent disruptions due to disputes with the Sudan and internal conflicts, and recently due to production cuts agreement by OPEC members. Crude oil production has been fluctuating due to various reasons. In 2020, South Sudan crude oil production revolves around 185 000 barrels/day. The impact of low oil production was compounded by the decline in international crude oil prices following the outbreak of COVID-19 coupled by the trade war between China and United States of America. The decline in international crude oil prices has severely affected the economy of South Sudan by reducing the export revenues.

The South Sudan Pound plummeted to an all-time low against the US dollar. The scarcity of US dollars in the banks coupled with reduced foreign currency earnings hampered the ability of the Central Bank to protect the local currency, leading to its accelerated depreciation in the parallel market. The parallel market exchange rate in the capital Juba traded at the historical low rate, at SSP 450/US dollar towards the end of August 2020. The gap between the parallel and official exchange markets continues to widen, as the Bank of South Sudan rate revolved around 165 SSP/US dollar. Though foreign exchange reserves enough to cover at least imports obligations of three months is the bare minimum, the Bank of South Sudan announced the running dry of foreign exchange reserves and leading to its inability to reverse an alarming depreciation of the South Sudan Pounds.

Figure 1 Inflation and exchange rates



According South Sudan National Bureau of Statistics, the general inflation rate in South Sudan, reached its highest level in September 2016, at 549%, following the July 2016 conflict in the country. Though the inflation rate dropped from its peak, it continued to remain higher than 100% till July 2018 (except for May and June 2018, where the rates were 83.7% and 88%, respectively), when the inflation rate dropped to the higher side of two-digits (75%). From August 2018 – May 2020, the inflation rates fluctuated from 33% to 88%. However, the inflation rate was above 100 for three months, August to October 2019. The same source has released the inflation rate dropped to one digit in June and July 2020, reaching the lowest rate in July, standing at 7.5% (**see Figure 1**). The high inflation rate has been driven partly by the continued increase in both food and non-food commodity prices contrary to the decrease witnessed in the food source markets such as Uganda.

2. Objectives of the profiles

The main objective of this market profile is to provide a summary of the market performance and operations in the country. The specific objectives of the market profile include:

i. Understanding the trade routes and flow of commodities;

ii. Mapping county markets and their functionality;
iii. Describing factors that affect food markets in the country; and
iv. Recommending markets with Cash Based Transfers (CBT) potential for CBT and SAM project

3. Functioning of Markets in South Sudan

An analysis of FSNMS Round 24 and 25 data for the main markets at County level has revealed that most markets are seasonal with months when the markets are not fully functional[1]. **Figure 2** depicts the functioning and potential of markets for CBT disaggregated by season.

Figure 2 Functionality of markets by season

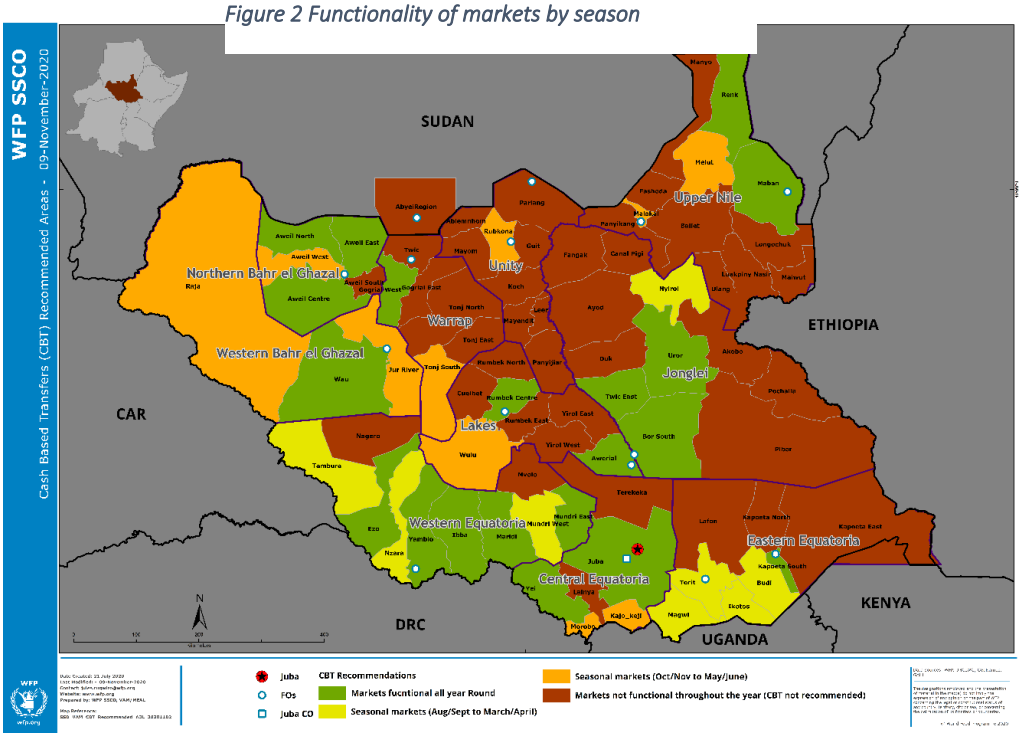


Table 1 summarizes counties by months when markets are not functioning. The main factor behind the non-functioning of these markets in those months listed in the Table 1 is associated to the peak of the rainy months that disrupt access to the trade routes and hence flow of goods. During the rainy months, households also don't have access or have difficulty to reach the nearest

Table 1. Seasonal markets by months

State	County	Months markets not functional
EE	Ikotos	May-Aug
	Magwi	May-Aug
	Torit	May-Aug
WE	Nzara	Apr-Jul
	Tambura	Apr-Jul
	Mundri West	Apr-Jul
Warrap	Tonj South	Jun-Sep
WBeG	Jur River	Jun-Sep
	Raga	Jun-Sep
NBeG	Aweil West	July-Sep
Lakes	Wulu	Jul-Oct
Jonglei	Nyirol	Apr-Sep
UN	Malakal	Jul-Sep
	Melut	Jul-Sep
Unity	Rubkona	Jun-Sep

[1] Functioning markets in this context refer to situation where many traders operate, households have physical access to markets, individual price setting prevails, restocking of goods takes short lead time and where households visit markets frequently.

market. These markets are all seasonal as they benefit from the availability of the local harvest, that makes these markets vibrant at the post-harvest period. The remaining county markets (classified as potential for CBT) across the country operate throughout the year.

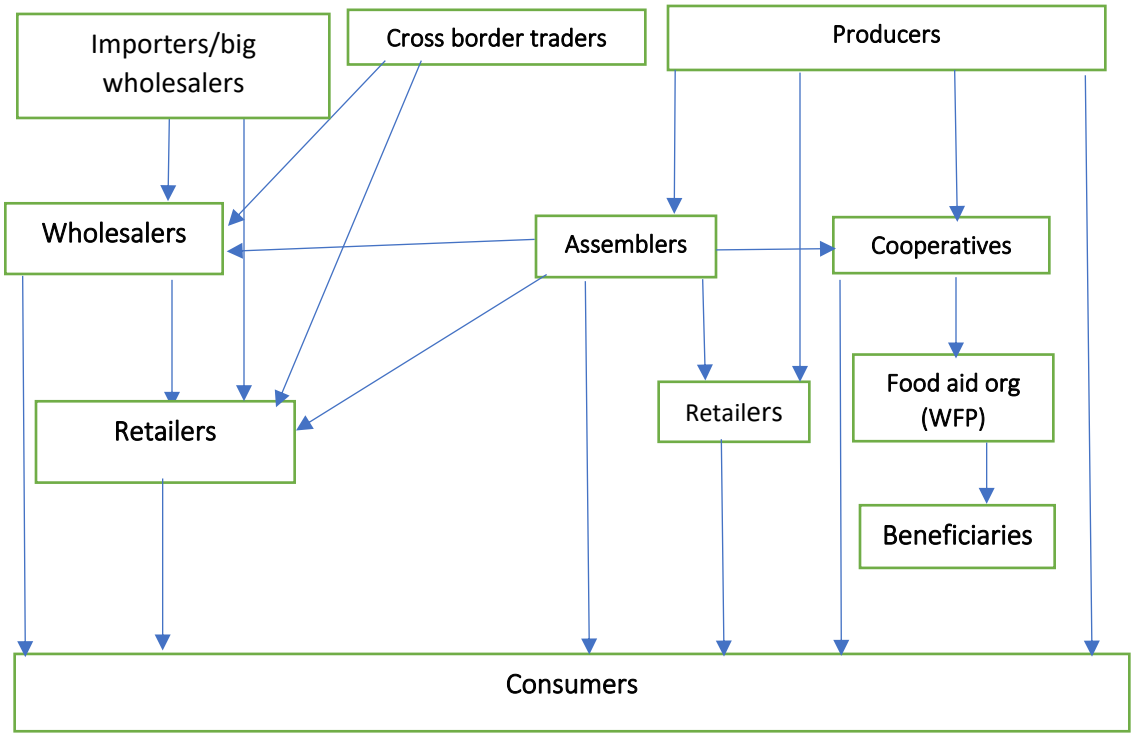
3.1 Factors that affect market functionality

Markets in South Sudan are challenged by many interlinked factors affecting its smooth functionality. Traders face chronic challenges of importing food from neighboring countries mainly due to fluctuating foreign exchange rate coupled with shortage of foreign currency as traders rely on the parallel market as the only source of US dollars. The underdeveloped roads infrastructure, high transport costs, the long-standing insecurity, robberies and theft along the trade routes and multiple informal checkpoints, are some of the key challenges affecting the normal functioning of markets in South Sudan. The months extending from May/Jun - Sep/Oct are rainy months where most roads in the country are impassable and normal flow of goods are disrupted. Additionally, low competition among traders, unstable and high food prices, lack of access to credit from banks by traders and high inflation rates challenge the functioning of markets.

4. Markets supply chain

The markets are supplied from both local production as well as mainly from imported commodities. **Figure 3** represents the typical marketing channels in the country.

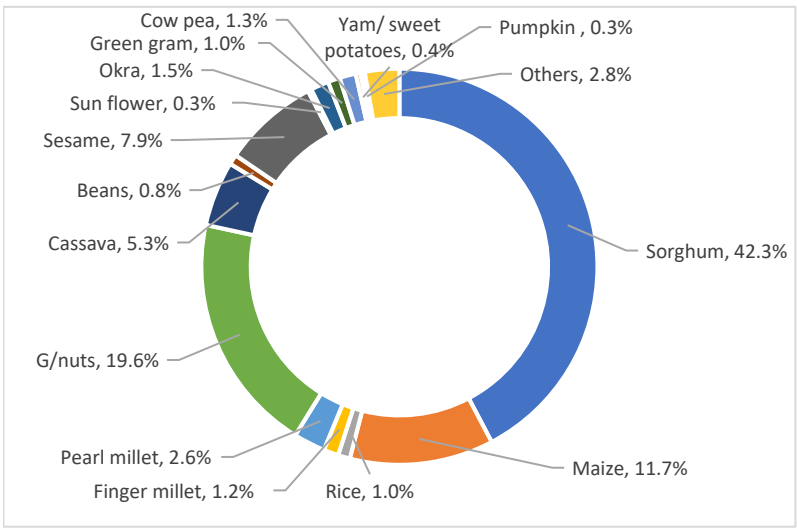
Figure 3 Typical marketing channel in South Sudan



4.1. Local production

Sorghum and maize are the two most widely produced and consumed cereals in South Sudan. Production of most crops in South Sudan is rain-fed and produced mainly by the smallholder subsistence farmers, with an average of about a hectare cultivated per household[2]. In the country, sorghum is the main cereal crop accounting for 72% of cereal area and 42% of all crops and is produced by both the subsistence traditional rainfed production systems and the large scale mechanize producers in the northern part of the country, Renk in Upper Nile state (**Figure 4** shows percent of crops cultivated). Most of the crops cultivated vary with the agroecological area. Majority of the produce by the traditional sector are for home consumption with some sold to traders. Small scale subsistence producers typically sell their cereals to assemblers (small scale traders) in rural collection centers during the post-harvest season. The traders who aggregate at the rural assembly centers sell the products to wholesalers or retailers at the county level markets or directly to consumers. WFP purchase staple cereals locally to supply these in the most deficit areas as part of the food assistance programme. WFP local purchases directly from selected areas, traders as well as farmers create market access to smallholders particularly in Western and Eastern Equatoria states, and in Renk, from large scale producers.

Figure 4 Area planted (% of crop) contributing to markets

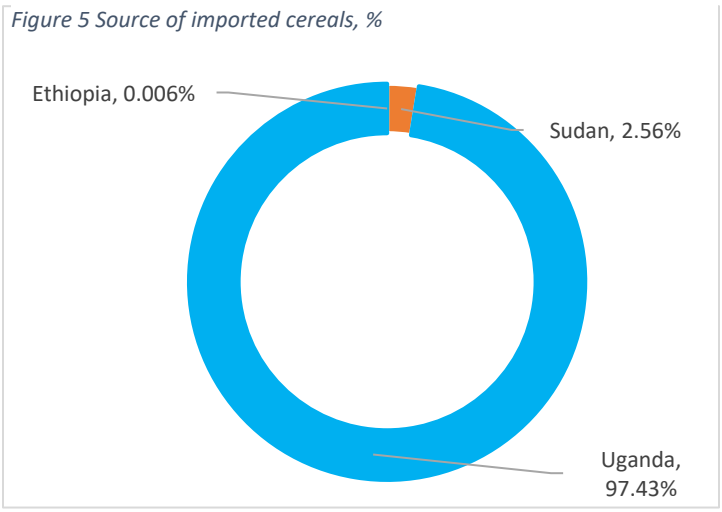


Source: Calculated from 2019 CFSAM data

4.2. Imported food sources

Imported food commodities reach the markets through formal and informal traders. As depicted in **Figure 5**, Uganda is the key source of imported staple cereals to South Sudan accounting for 97.4% of the trade volumes followed by Sudan (2.56%) and Ethiopia (0.006%). Importers or big wholesalers, mainly based in Juba and state capitals, do supply food commodities to most of the markets in the country, and these traders directly sell to wholesalers and retailers. Additionally, there are wholesalers who import goods to restock their own shops in the retail market. On the other hand, goods are supplied through the

Figure 5 Source of imported cereals, %



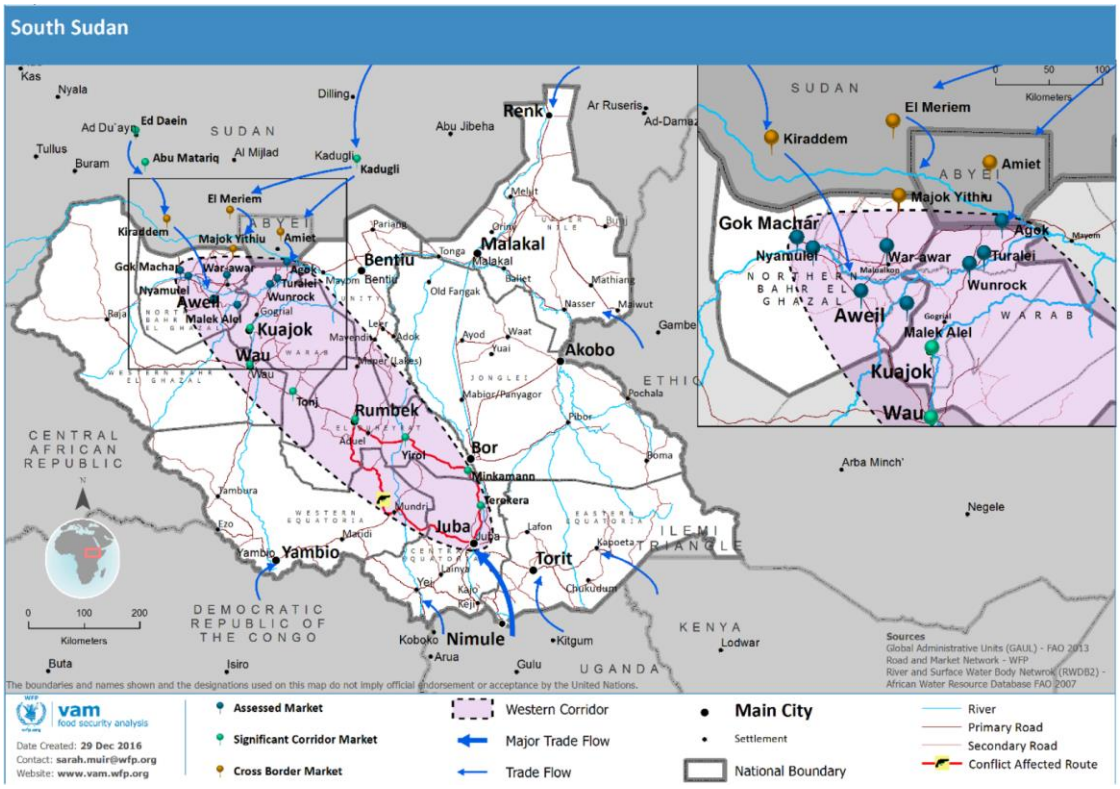
[2] CFSAM, 2019

informal cross border trade. Some cross-border traders smuggle food items for sell to wholesalers and retailers. In addition to the commercial trade,

5. Food supply Routes

Uganda through Nimule border is the main entry point of food and non-food commodities to South Sudan. In Northern part of the country bordering Sudan, the main crossing points include Gok Machar, Warwar, Renk and Abyei (Amiet). In the Eastern and East Western parts of the country, Akobo and Chukudum are the main crossing points. Moreover, due to insecurity situation in Western Equatoria through Maridi, traders in Yambio started to use trade routes through DRC to reach Yambio market (see Figure 6). In the dry season, imports from Uganda and Sudan are supplemented by local produces to meet markets demand, mainly from the green belt parts of the country.

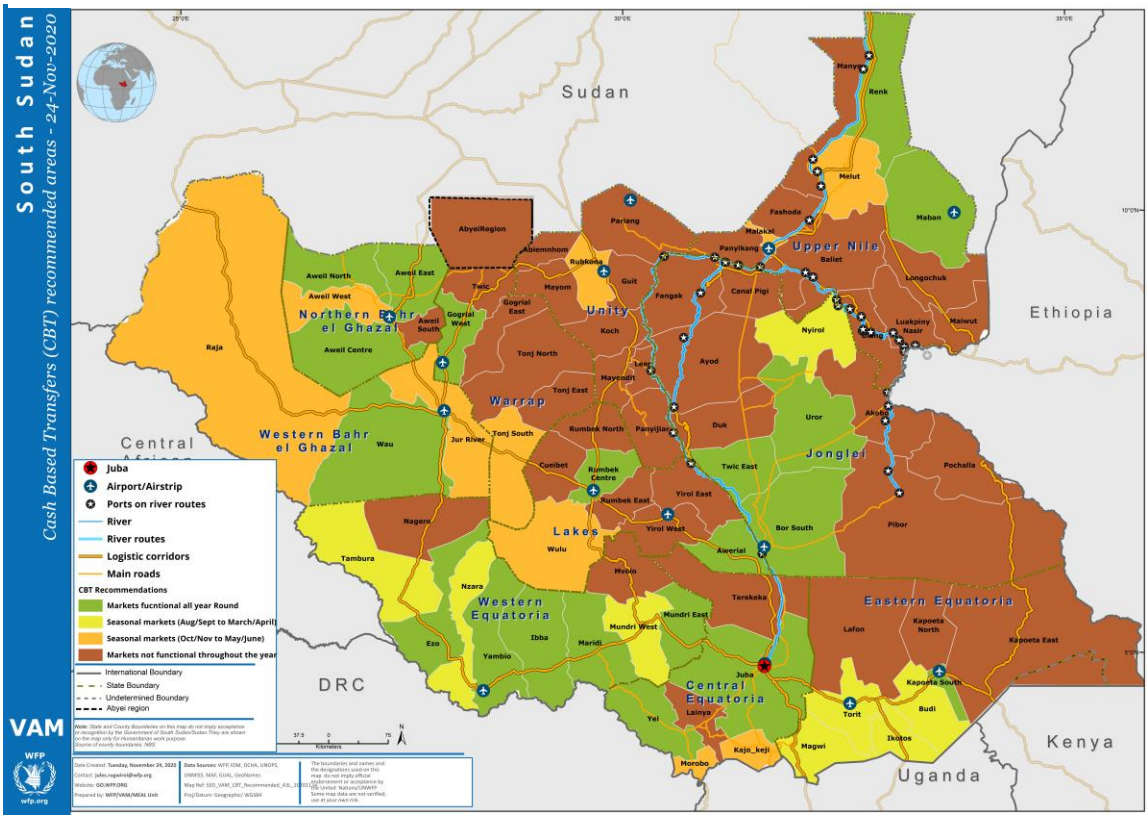
Figure 6 Major food supply routes



All transport means (inland, water and air) are available to transport goods. Thus, depending on the suitability of the areas and available infrastructures either one or a combination of these transport means are in use. The inland transport routes extending from Uganda to Juba is tarmac road and being a lifeline to imports, the security situation is well monitored and hence better, though few cases of banditry activities observed in the past. However, the inland transport routes in different parts of the States are not functional due to insecurity and other factors (see Figure 7). As the inland transport is affected by insecurity and impassable roads, freight transport costs continue to rise, affecting the flow of goods and entailing high cost of goods on markets. In the wet season, the Uganda route continues to supply Juba, and from Juba markets across the country get their supply through different transport options including commercial flights. The Sudan supply route is dependent upon road access, and therefore, when the roads become

inaccessible for commercial trucks during the wet season, traders use light vehicles at higher costs, leading to reduced import quantity. During the wet season internal supply routes from local primary markets are limited, with only river transport or transport of goods by foot possible, greatly restricting the flow of commodities into secondary markets. The river transport along the Nile connects Juba to the Renk, through Malakal and on the way reaching so many locations. Additionally, the river transport also connects the capital Juba to Jonglei, and the Northern parts of the country linked to Jonglei (see Figure 8) by river transport as well. The functioning of the river transport routes depends on the level of insecurity. Commercial air transport connects Juba to all State capitals and some additional locations such as Yida, Bunj, Yirol Centre and Kapoeta.

Figure 7 Inland and river transport routes and commercial flight sites



6. Demand

6.1 Contribution of Markets to Household Food Sources

Own production and market accounts more than 80% of the overall food sources in the country. The contribution of market and own production fluctuates by season - markets contribute more than own production during the lean season and vice versa during the harvest season. FSNMS data showed that market as source food contributed for about 40% of

Table 2. Food sources, %

	Own production		Markets		Assistance		Other	
	Jun-19	Nov-19	Jun-19	Nov-19	Jun-19	Nov-19	Jun-19	Nov-19
Central Equatoria	43.1	56.4	48.5	33.5	1.0	1.5	7.4	8.7
Eastern Equatoria	24.8	57.1	41.5	27.7	7.6	1.1	26.1	14.1
Jonglei	38.7	31.8	27.7	29.5	20.1	20.0	13.5	18.7
Lakes	37.4	57.2	38.7	32.0	9.0	4.0	14.8	6.8
Northern Bahr el Ghazal	21.8	36.9	55.2	51.6	0.5	0.2	22.6	11.3
Unity	24.6	36.3	31.0	33.5	33.9	25.0	10.5	5.2
Upper Nile	31.8	26.5	44.7	49.5	6.4	11.0	17.1	13.1
Warrap	34.0	57.8	36.4	31.8	5.5	0.8	24.1	9.7
Western Bahr el Ghazal	22.4	49.6	34.1	44.6	21.6	0.2	22.0	5.5
Western Equatoria	45.6	59.7	45.0	36.7	4.2	0.5	5.2	3.1
Total	**33.6**	**46.0**	**39.7**	**35.8**	**11.2**	**7.7**	**15.4**	**10.5**

the households in June 2019, and the figure dropped to 36% during the harvest season, November 2019. Own production had 34% of contribution in June 2019 and the percentage increased to 46% in November, when households started to consume from fresh harvests. State level disaggregated FSNMS data indicates that many households depend on markets in the month of June as compared to November. The exceptions were in Western Equatoria and Jonglei where the contribution of own production outweighs markets in both seasons. Furthermore, the contributions of market as source of food were higher in Northern Bahr el Gahazal and Upper Nile states during both rounds, which indicates the heavy reliance of households on markets in these two states. The below **Figure 8 and 9** depict the main food sources disaggregated by season.

Figure 8 Major food sources during the lean season

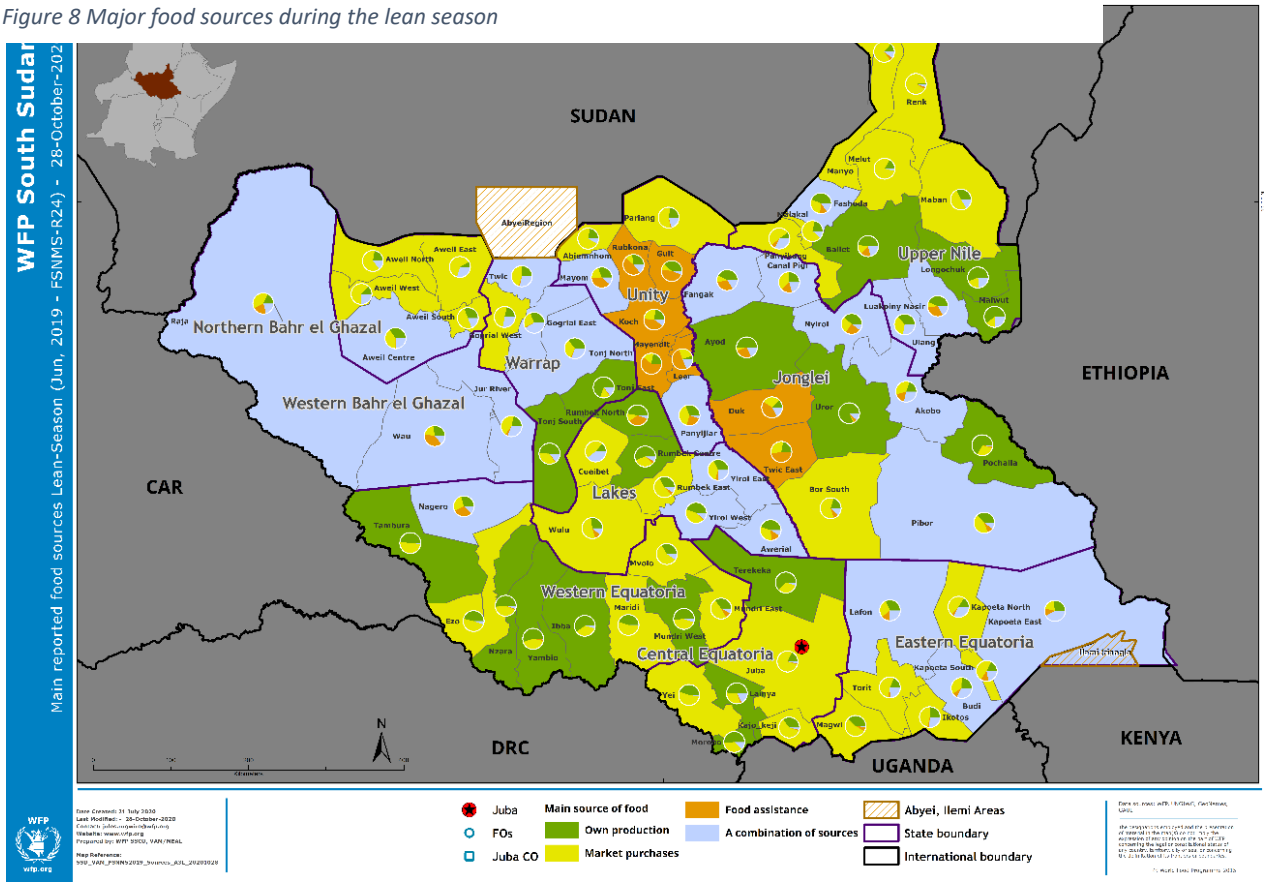
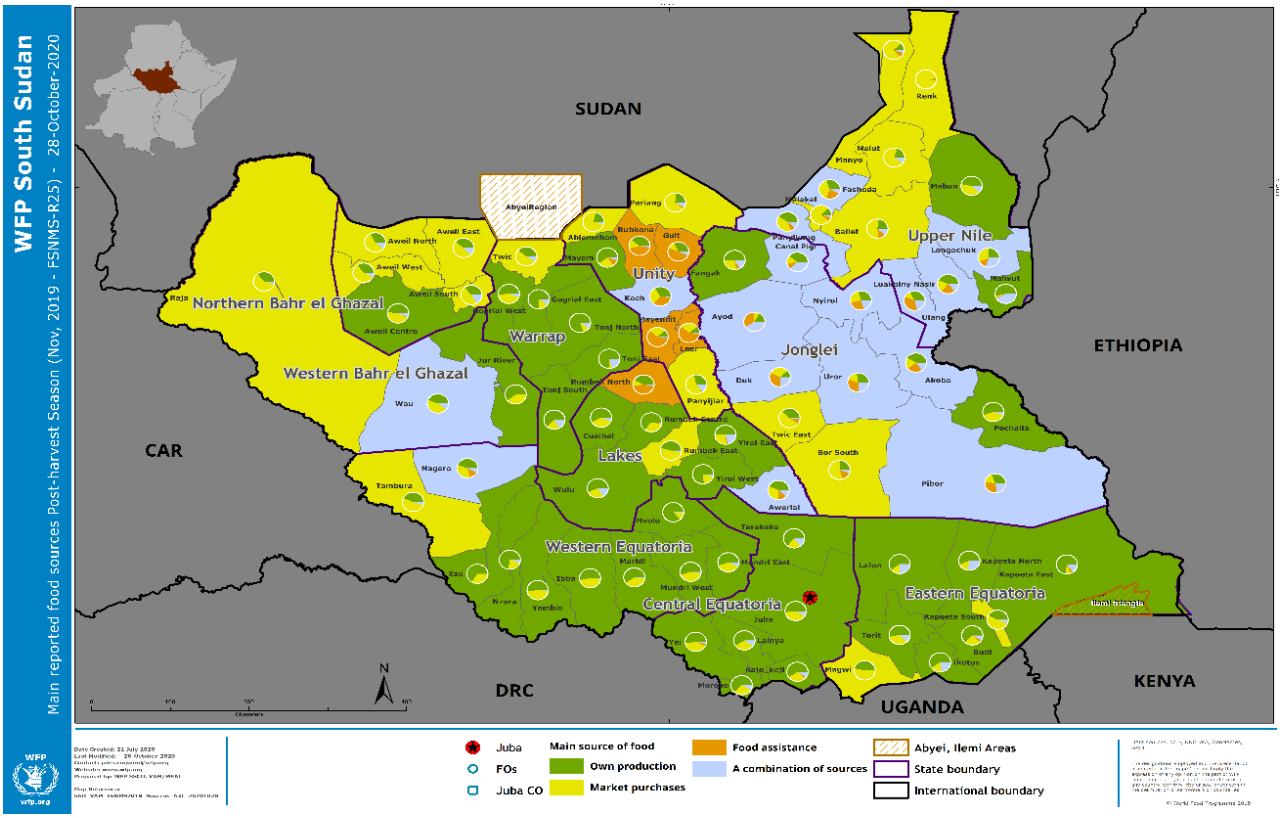


Figure 9 Major food sources during the harvest season



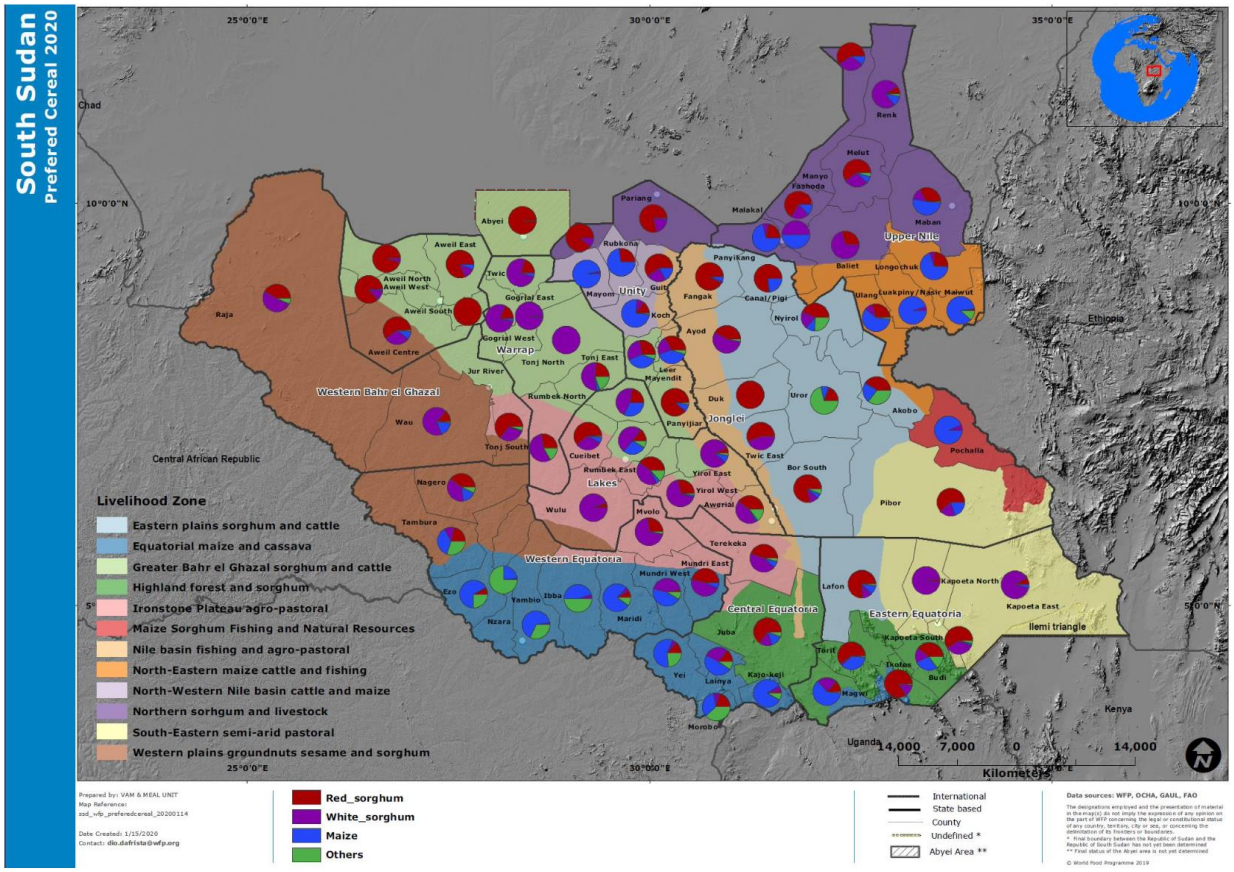
6.2 Households Expenditure on Food

Expenditure on food accounts the highest proportion of the overall household's expense across states, accounting for 67% in November 2019 and 73% in June 2019. State level disaggregated data shows that all states (except Warrap and Lakes) expenditure on food is high 65-75% and very higher, more than 75%. The higher the proportion of food expenditure the more likelihood of household's vulnerability to economic shocks. Given the continued depreciation of the South Sudanese Pound against the dollar and the heavy reliance on imports, the purchasing power of households with high and very high expenditure on food are extremely vulnerable to market shocks.

6.3 Households' Cereal Preferences

The preference of type of cereal determines the type of commodities being marketed or provided in the basket as food aid. Sorghum is the most preferred cereal across the country. From FSNMS Round 25 (November 2019), white sorghum was preferred mostly in Warrap (all counties), the Kapoetas in EES, Lakes (most counties) and WBeG (Wau); and UNS (Renk, Bailet). Red sorghum was most preferred in NBeG (most counties) Jonglei (southwestern counties). Majority of the households prefer maize as the main staple in Western Equatoria; Eastern counties of both Upper Nile and Jonglei states; most of Unity; and Rumbek counties of Lakes and a few counties in Eastern Equatoria (**see Figure 10**). There is also a mixed preference of white and red sorghum, sorghum and maize and others (cassava, rice or millets), varying across counties. The below map depicts the preference of cereals by county which helps humanitarian organizations to look at preference of households into their programme designing stage. Furthermore, consideration of household preference between white and red sorghum should also be noted.

Figure 10 Preferred cereal

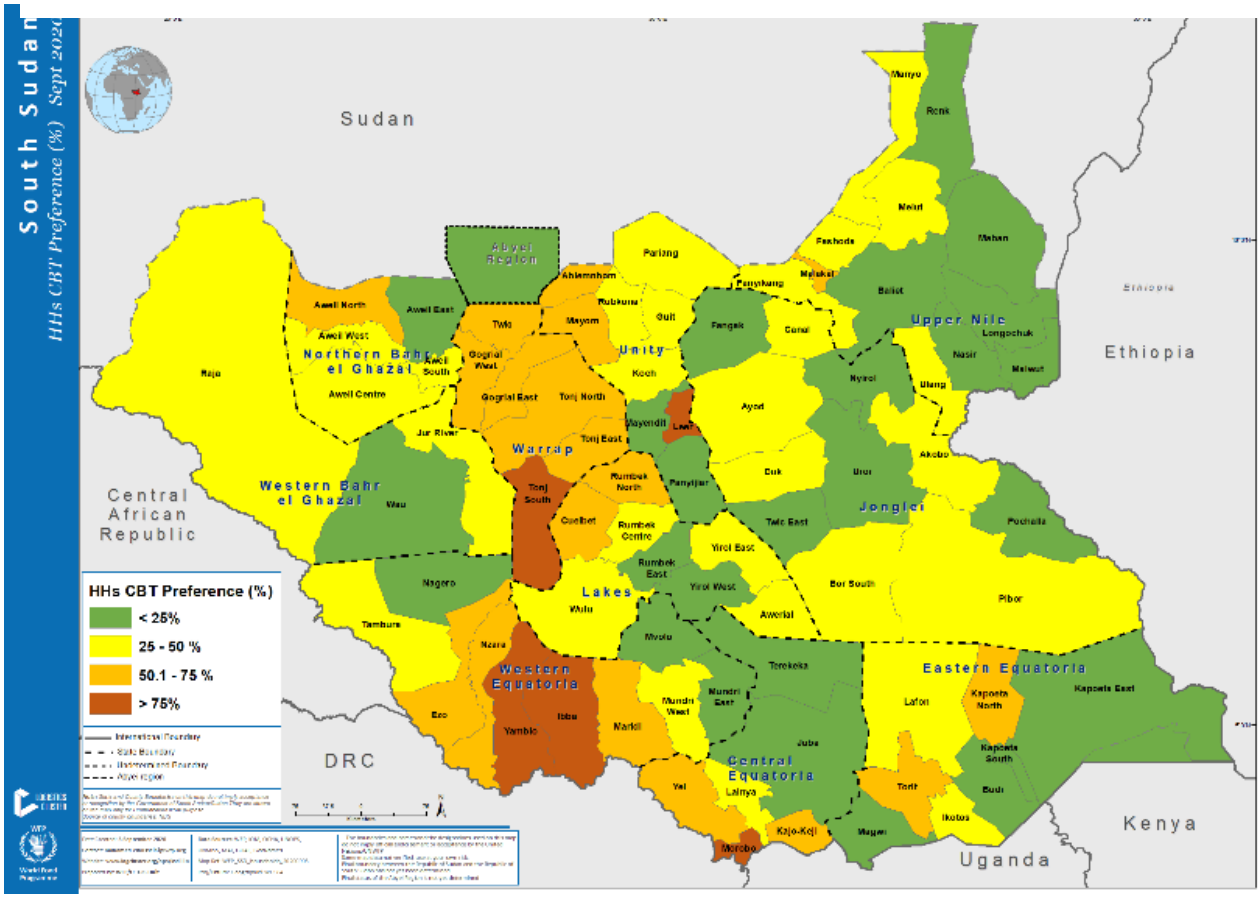


7. Transfer modality preference

Whilst the distribution of CBT preference varies across the counties, it should be noted that given the seasonality of market functionality (see Table 1), for some counties the transfer modalities preference should take this into consideration. Households in 80% of counties classified as having seasonal markets

(12 out of 15 counties in Table 1) preferred in-kind assistance over CBT, which justifies the role of functioning markets for cash based programmes interventions. However, it should be noted that there were households who preferred cash assistance in counties where markets are classified as less potential for CBT. From FSNMS Round 25 data, more than 50% of households prefer CBT over in-kind assistance in Warrap (all counties), Western Equatioria (except Mundi West), few counties in Lakes (Rumbek North and Cueibiet), Eastern Equatoria (Torit and Kapoeta North) and Central Equatoris (Yei, Kojo-Keji and Morobo), Leer in Unity, Aweil North in Northern Bahr el Ghazal and Malakal in Upper Nile states (**see Figure 11)**. Though most of counties classified as potential for CBT tally with the households' preference, there are counties not tallying with the preference of households.

Figure 11 Households CBT preference



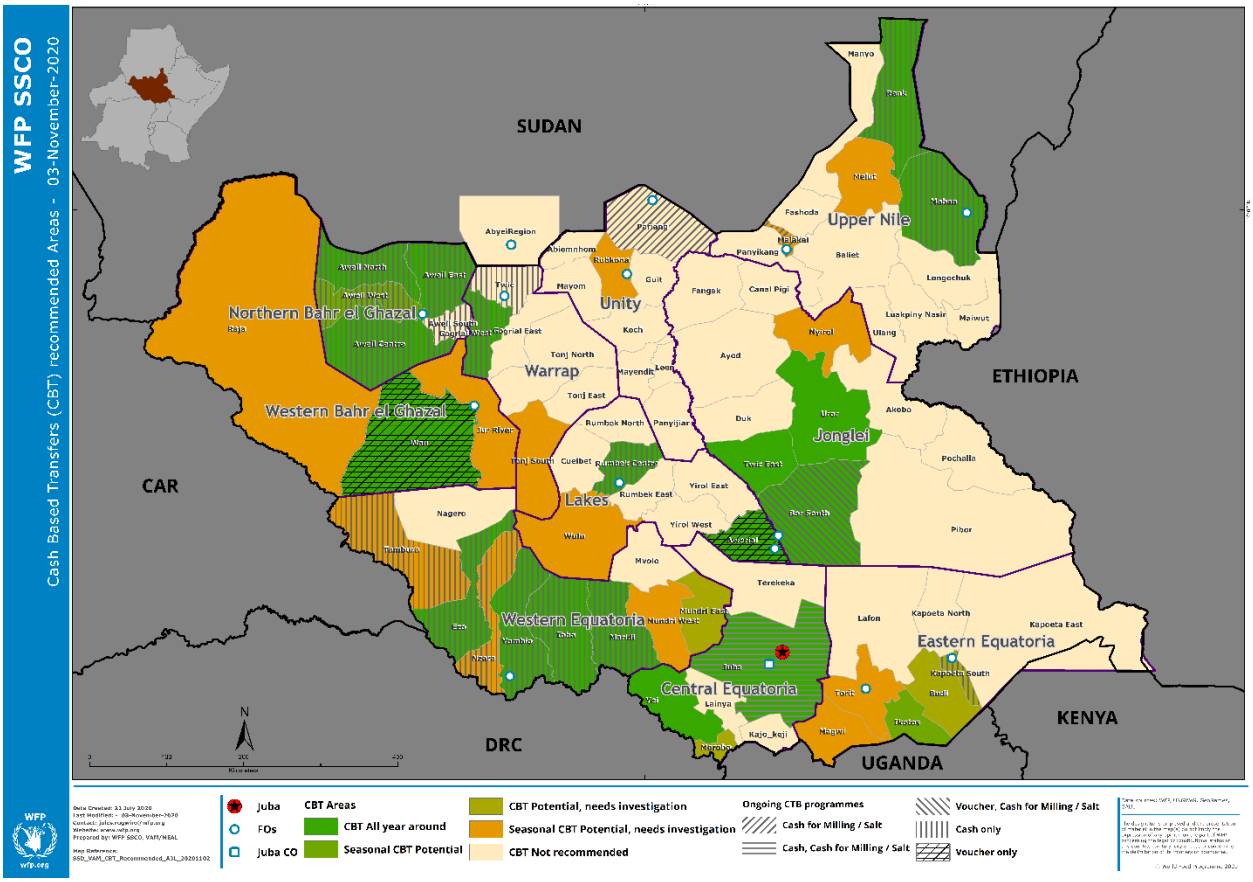
8. Recommendation of CBT by County

Generally, South Sudan is a cereal deficit country. However, some counties in the Greater Equatoria states have surplus production and counties with surplus production have the potential to support WFP Smallholder Agriculture Marketing (SAM) project during the harvest period. These counties are Tambura, Ezo, Yambio, Maridi, Mundri in WES, Yei, Kajo Keji, Juba and Terkeka in CES and Chukudum in Eastern Equatoria. In order to stimulate agricultural production and create market access for producers, the SAM project could be implemented in selected *payams* in Magwi and Torit, where the deficit is minor. Moreover, there is a potential for SAM in Renk where large scale commercial farms operate. In South Sudan, factors

beyond demand and supply affect functioning of markets. Therefore, any market-based interventions (SAM or CBT) should be based on updated information about the situation on ground.

Based on commodity availability, logistics that is also related to market supply, number of traders in the market, time it takes to supply the market and the household access to markets, four categories on potential for CBT by county was generated[3]. These are 1) CBT potential all year round 2) Seasonal CBT potential 3) Seasonal CBT potential, but needs further investigation 4) CBT not recommended (see Annex 1 for the analysis) Accordingly, 20 counties have CBT potential all year round, four counties have CBT potential with further investigation, 13 counties have seasonal CBT potential with further investigation and the remaining 42 counties have no CBT Potential (see Figure 12). However, categorization of counties according to their CBT potential is irrespective of the analysis of trade volumes. Thus, there is a need to caution the caseloads before the introduction of CBT in those counties.

Figure 12 CBT potential counties



[3] Market Functionality Index, MFI, assigns the marketplace a score representing its functionality and the tool must not be adapted to the local context. This market profile is also based on score-based analysis, given that the data was not adequate to create the MFI.

Annex 1. CBT potentials of counties

State	County	Market purchases, HHs response % (FSNMS R24 -Dry season)= (1= > =70% of HHs depend on markets for staples, 0= Less than 70% of HHS depend on markets for staples)	Market purchases, HHs response % (FSNMS R25 -Dry season)= (1= > =70% of HHs depend on markets for staples, 0= Less than 70% of HHS depend on markets for staples)	Cereal Balance Sheet (1= Cereal surplus county, 0= Cereal Deficit county)	Market Frequency to buy cereals and pulses R24 (1=More than 70% of HHs purchased food frequently,>3 times/month, 0=Less than 70% of HHS purchaed less frequently)	Frequency to buy cereals and pulses R25 (1=More than 70% of HHs purchased food frequently,>3 times/month,	# of Traders (1= More than 20 traders operate, 0=Less than 20 traders operate in the market)	# weeks to/from source market (1=it takes one week to restock, 0=It takes more than a week)	% HHs reported market is far/no transport means (1= HHs reported markets are not far from home, 0= HHs reported markets are far)	Price determination (1= Prices are determined individually, 0=Prices are determined jointly)	HHs CBT Preference (1= HHs prefer CBT; 0 HHs prefer In-kind)	Sum of scores)	Score based markets categorization	Months markets not functional	Mapping of CBT areas (1= CBT all year round; 1a= Seasonal CBT potential; 2= CBT Potential needs Investigation; 2a= Seasonal CBT Potential needs Investigation; 3= CBT not recommended;)
CE	Juba	1	0	0	0	0	1	1	1	1	0	5	1		1
	Kajo-Keji	0	0	1	0	0	0	1	0	1	0	3	3		3
	Lainya	0	0	0	0	0	1	1	1	0	0	3	3		3
	Morobo	0	0	1	0	0	0	1	0	1	1	4	2	July-Sep	2
	Terkeka	0	0	0	0	0	1	1	0	0	0	2	3		3
	Yei	0	0	1	0	0	1	1	1	0	1	5	1		1
EE	Budi	0	0	1	0	0	1	1	1	0	0	4	2	May-August	2
	Ikotos	1	0	1	0	0	0	1	1	1	0	5	1	May-August	1a
	Kapoeta East	0	0	0	0	0	0	0	0	1	0	1	3		3
	Kapoeta North	1	0	0	0	0	0	1	0	0	0	2	3		3
	Kapoeta South	1	0	0	0	0	1	0	1	0	0	3	2		2
	Lafton	0	0	0	0	0	0	1	0	1	0	2	3		3
	Magwi	0	0	1	0	0	0	1	1	0	0	3	2	May-August	2a
	Torit	1	0	0	0	0	1	1	0	1	0	4	2	May-August	2a
WE	Yambio	0	0	1	0	0	1	1	1	1	1	6	1		1
	Nzara	0	0	1	0	0	0	1	1	0	1	4	2	Apr-Jul	2a
	Ibba	0	0	1	0	0	1	1	1	1	1	6	1		1
	Ezo	0	0	1	0	0	1	1	1	1	0	5	1		1
	Maridi	0	0	1	0	0	1	1	1	1	0	5	1		1
	Tambura	0	0	1	0	0	1	0	1	1	0	4	2	Apr-Jul	2a
	Mundri West	0	0	1	0	0	0	1	1	1	0	4	2	Apr-Jul	2a
	Mundri East	0	0	1	0	0	0	1	1	1	0	4	2		2
	Mvolo	0	0	0	0	0	1	1	1	0	0	3	3		3
	Nagero	0	0	0	0	0	0	0	1	1	0	2	3		3
Warrap	Abyei	0	0	0	0	0	0	1	1	0	0	2	3		3
	Gogrial East	0	0	0	0	0	1	1	1	0	0	3	3		3
	Gogrial West	1	0	1	0	0	1	1	1	0	0	5	1		1
	Tonj East	0	0	0	0	0	0	1	0	0	0	1	3		3
	Tonj North	0	0	0	0	0	1	1	1	0	0	3	3		3
	Tonj South	0	0	1	0	0	1	1	0	0	1	4	2	Jun-Sep	2a
	Twic	0	0	0	1	0	0	1	0	0	0	2	3		3
WBeG	Jur River	0	0	0	0	0	1	1	1	1	0	4	2	Jun-Sep	2a
	Raga	0	0	1	0	0	0	1	1	1	0	4	2	Jun-Sep	2a
	Wau	0	0	0	0	0	1	1	0	1	0	3	1		1
NBeG	Aweil Center	1	0	0	0	0	1	1	0	0	0	3	1		1
	Aweil East	1	1	0	0	1	1	1	1	0	0	6	1		1
	Aweil North	1	0	0	0	0	1	1	1	1	0	5	1		1
	Aweil South	1	0	0	1	0	1	0	1	0	0	4	3		3
	Aweil West	0	1	0	0	0	1	1	1	1	0	5	1	July-Sep	1a
Lakes	Awerial	0	0	0	0	0	1	1	1	0	0	3	1		1
	Cueibet	0	0	1	0	0	1	0	0	0	0	2	3		3
	Rumbek Centre	0	0	0	0	0	1	1	0	0	0	2	1		1
	Rumbek East	0	0	0	0	0	0	1	1	0	0	2	3		3
	Rumbek North	0	0	0	0	0	0	1	1	0	0	2	3		3
	Wulu	0	0	1	0	0	0	1	1	1	0	4	2	Jul-Oct	2a
	Yirol East	1	1	0	0	0	1	0	0	0	0	3	3		3
	Yirol West	0	0	1	0	0	1	0	1	0	0	3	3		3
Jonglei	Akobo	0	0	0	0	0	1	1	1	0	0	3	3		3
	Ayod	0	0	0	0	0	1	1	0	1	0	3	3		3
	Bor South	0	0	0	0	0	1	1	1	0	0	3	1		1
	Canal/Pigi	0	0	0	0	0	1	1	1	0	0	3	3		3
	Duk	1	0	0	0	0	0	0	1	0	0	2	3		3
	Fangak	0	0	0	0	0	1	0	1	0	0	2	3		3
	Nyirol	1	1	0	0	0	1	0	1	0	0	4	2	Apr-Sep	2a
	Pibor	1	1	0	0	0	0	0	1	0	0	3	3		3
	Pochalla	1	1	0	0	0	0	0	0	0	0	2	3		3
	Twic East	1	0	0	0	0	1	1	1	1	0	5	1		1
	Uror	1	1	0	1	1	1	1	0	0	0	6	1		1
UN	Baliet	1	0	0	0	0	0	1	1	0	0	3	3		3
	Fashoda	0	1	0	0	0	0	1	1	0	0	3	3		3
	Longochuk	0	0	0	0	0	0	1	0	0	0	1	3		3
	Nasir	1	0	0	0	0	1	1	0	0	0	3	3		3
	Maban	0	0	0	0	0	1	1	1	0	0	3	1		1
	Maiwut	0	0	0	0	0	0	1	1	0	0	2	3		3
	Malakal	0	0	0	0	0	1	1	1	0	0	3	2	Jul-Sep	2a
	Manyo	0	0	0	0	0	0	1	1	0	0	2	3		3
	Melut	1	0	0	0	0	1	1	0	1	0	4	2	Jul-Sep	2a
	Panyikang	0	0	0	0	0	1	0	1	0	0	2	3		3
	Renk	0	0	0	0	0	1	1	1	0	0	3	1		1
	Ulang	0	0	0	0	0	0	1	1	0	0	2	3		3
Unity	Abiemnhom	0	0	0	0	0	0	1	1	1	0	3	3		3
	Guit	1	0	0	0	0	0	1	1	1	0	4	3		3
	Koch	0	0	0	0	0	1	1	1	0	0	3	3		3
	Leer	0	0	0	0	0	1	1	0	1	1	4	3		3
	Mayendit	1	0	0	0	0	0	1	1	1	0	4	3		3
	Mayom	0	0	0	0	0	1	1	0	0	0	2	3		3
	Panyijiar	0	0	0	0	0	1	0	1	1	0	3	3		3
	Pariang	0	0	0	0	0	1	0	0	1	0	2	3		3
	Rubkona	0	0	0	0	0	1	0	1	1	0	3	2	Jun-Sep	2a