

South Sudan – Monthly Market Prices

November 2021



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Highlights



Cross border trade between Sudan and South Sudan resumed to normal operations in November, and hence allowing the flow of goods into South Sudan. Amiet is one of the main entry points to supply goods into South Sudan to Northern Bahr el Ghazal, Warrap, Western Bahr el Ghazal and Unity states.



The average prices of white sorghum increased in Warrap, Northern Bahr el Ghazal, Unity (Yida) and Upper Nile (Maban) states markets. **The uncertainty about the resumption of trade with Sudan during in early November this year, coupled with bad road conditions have contributed to an increase in price of white sorghum.**



Improved supply from seasonal harvests with an observed stable exchange rate have contributed to the overall stability in prices for commodities such as white maize for the month of November as compared to the previous month of the same year (2021). White maize prices fluctuated within 10%: recorded decreases in Juba, Torit and Kapoeta, whilst an increase in prices was noted in Aweil, Rumbek and Makpandu markets.



The price of average sized goat covered 50 - 90% of cash required to meet a household (6 family size) monthly minimum energy (2100 kcal) basket cost in Warrap, Northern Bahr el Ghazal, Central Equatoria, Eastern Equatoria (Kapoeta south) and Lakes states.



The daily wages of unskilled labour were sufficient to cover the cost of a food basket in meeting the daily minimum energy requirements of a household of six family size in many of the markets. However, wage dependent households need to work everyday in order to ensure the economic access to food from the markets, as income from daily wages are insufficient to cover cost of food basket for the next day.



In Juba, SSP to US dollar exchange rate continued to remain stable and the reference rate was exchanged on average at SSP 412, almost closer to 60% of depreciation against November 2020. The exchange rate in the remaining reference markets was ranging from as high as SSP 403 in Malakal and Aniet, and as low as SSP 422 in Mingkaman.

Cereals and pulses price variations: November vs. October 2021

After days of cross border trade suspension between Sudan and South Sudan (during last week of October), finally restrictions in the border have been lifted in November 2021. Following the resumption of the border trade, goods are flowing to South Sudan, mainly through Amiet. Amiet market serves as the main supply source to other markets in Northern Bahr el Ghazal, Warrap, Western Bahr el Ghazal and Unity states. The figure in the right shows trucks from Sudan delivering goods at Amiet market during the second week of November.

The average price of white sorghum increased in Warrap, Northern Bahr el Ghazal, and Unity (Yida) and Upper Nile (Maban) states markets. However, the uncertainty about the resumption of trade with Sudan coupled with bad road conditions have contributed to an increase in price of white sorghum in the above-mentioned markets. On the contrary, white sorghum prices moderately dropped (10-30%) in Mingkaman, Rubkona and Bentiu markets.

Market areas like Wau, Juba, Rumbek and Malakal observed stable prices of white sorghum. The stability as well as a slight drop in prices of white sorghum were attributed to a combination of factors - seasonal harvests, stable exchange rate and distributions of humanitarian food.



Amiet market - Trucks supplying goods from Sudan.
Nov 18, 2021. Photo by Gum Malek

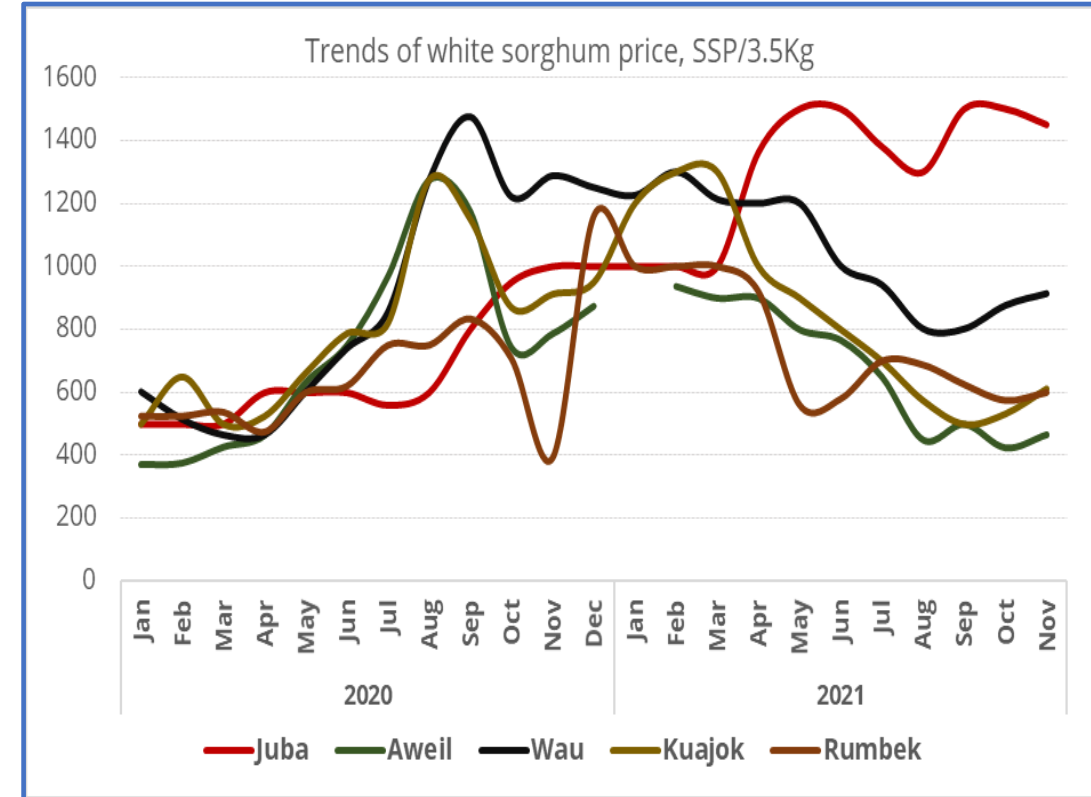
Cereals and pulses price variations: November vs. October 2021

Improved supply into markets from seasonal harvests coupled with stable exchange rate have contributed to the overall stable prices of white maize as compared to the level in October 2021. White maize prices fluctuated within 10%: decreased in Juba, Torit and Kapoeta, but prices have increased in Aweil, Rumbek and Makpandu markets.

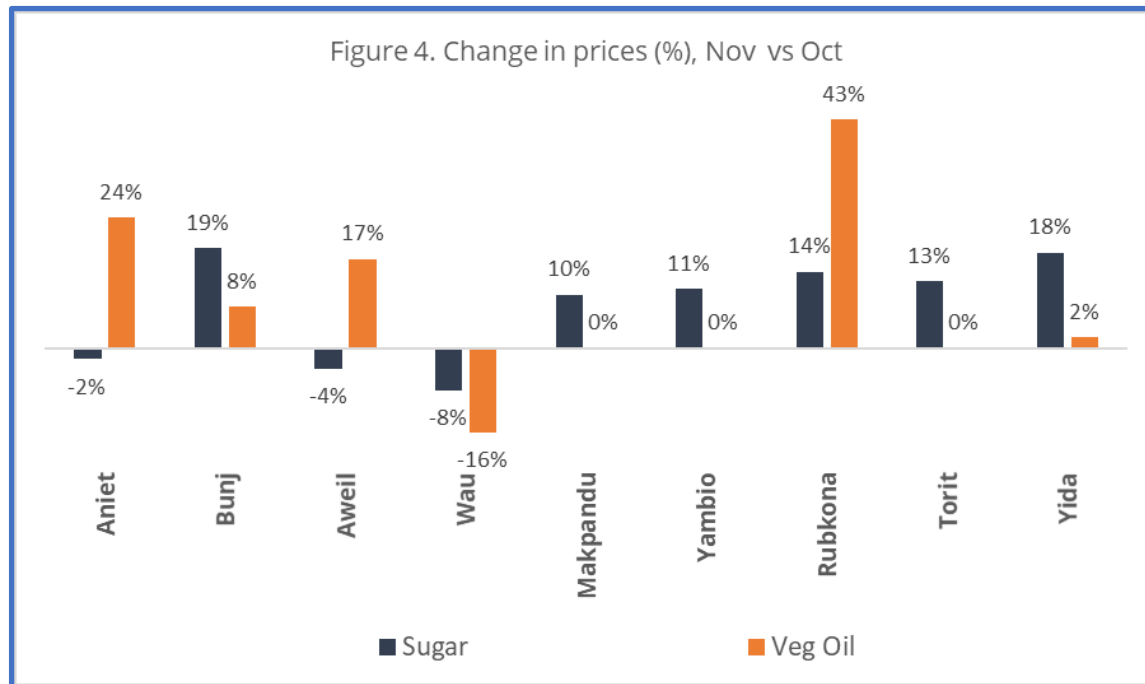
The retail price of maize meal rose in Juba, Rumbek, Torit and Yida, ranging from 15-40%. Despite the observed prices increase in these markets, the level of prices was the lowest in Torit, at SSP 250 per kilogram.

Maize meal price has either remained the same or witnessed slight changes (less than 10%) in Bor, Wau, Kapoeta, Malakal and Akobo markets. Increase in price of maize meal at Juba and its stability in remotely located markets such as Malakal and Wau and Malakal shows the influence of non-market factors in determining prices.

Beans (red) price witnessed stability in the last two consecutive months driven by stable exchange rate and improved supply from imports and seasonal harvests. However, Rumbek and Rubkona markets experienced increase in prices of beans (red) as high as 30% and 22%, respectively. In case of Rubkona, the driver could be due to the floods in the area. In November, the level of beans price was the highest in Malakal (SSP1500/kg) followed by Rumbek at SSP 1300/kg.



Cooking Oil and Sugar price variations: November vs. October 2021



Cooking oil prices remained unchanged as compared to that of October in about half of the reference markets. As the stability of exchange rate continued, major market centers such as Juba, Aweil, Wau, Kuajok, Kapoeta and Mingkaman experienced stable prices. However, the stable exchange rate has not favored Makpandu, Rubkona, Torit, Yambio and Yida markets to have stable prices of imported cooking oil (see *Table B and C*).

Sugar (brown) prices showed mixed trends as compared to October 2021. Markets experienced increase in sugar prices were Aniet, Aweil, Bentiu and Rubkona, ranging from 15-45%. These markets receive supplies from Sudan and the temporary disruptions of goods movement from Sudan coupled with limited resilience of these markets contributed to the surge in prices.

Terms of Trade (TOT)

The economic access of livestock dependent households to food from markets has been negatively affected in some of the markets. The major driving factors to decrease in cost of livestock could be depressed livestock demand, and deteriorated body conditions of livestock in flood affected areas.

An increase in prices of sorghum led the economic access to food from markets to deteriorate in Warrap, Northern Bahr el Ghazal and Upper Nile (Bunj). However, the purchasing power of livestock dependent households improved in Western Bahr el Ghazal, Western Bahr el Ghazal and Lakes (Rumbek Center). This is driven by an increase in livestock prices and stable cereals prices.

The price of average sized goat covered 50 – 90% of cash required to meet a household (6 family size) monthly minimum energy (2100 kcal) basket cost in Warrap, Northern Bahr el Ghazal, Central Equatoria, Eastern Equatoria (Kapoeta South) and Lakes states. However, average sized goat covered a slightly higher than monthly cost in Western Equatoria and Eastern Equatoria (Torit).

Overall, the purchasing power of daily wage dependent households remained stable in many of the reference markets. However, there were some markets which experienced deterioration in purchasing power for example Aniet in Warrap, Aweil in Northern Bahr el Ghazal and Bunj in Upper Nile states.

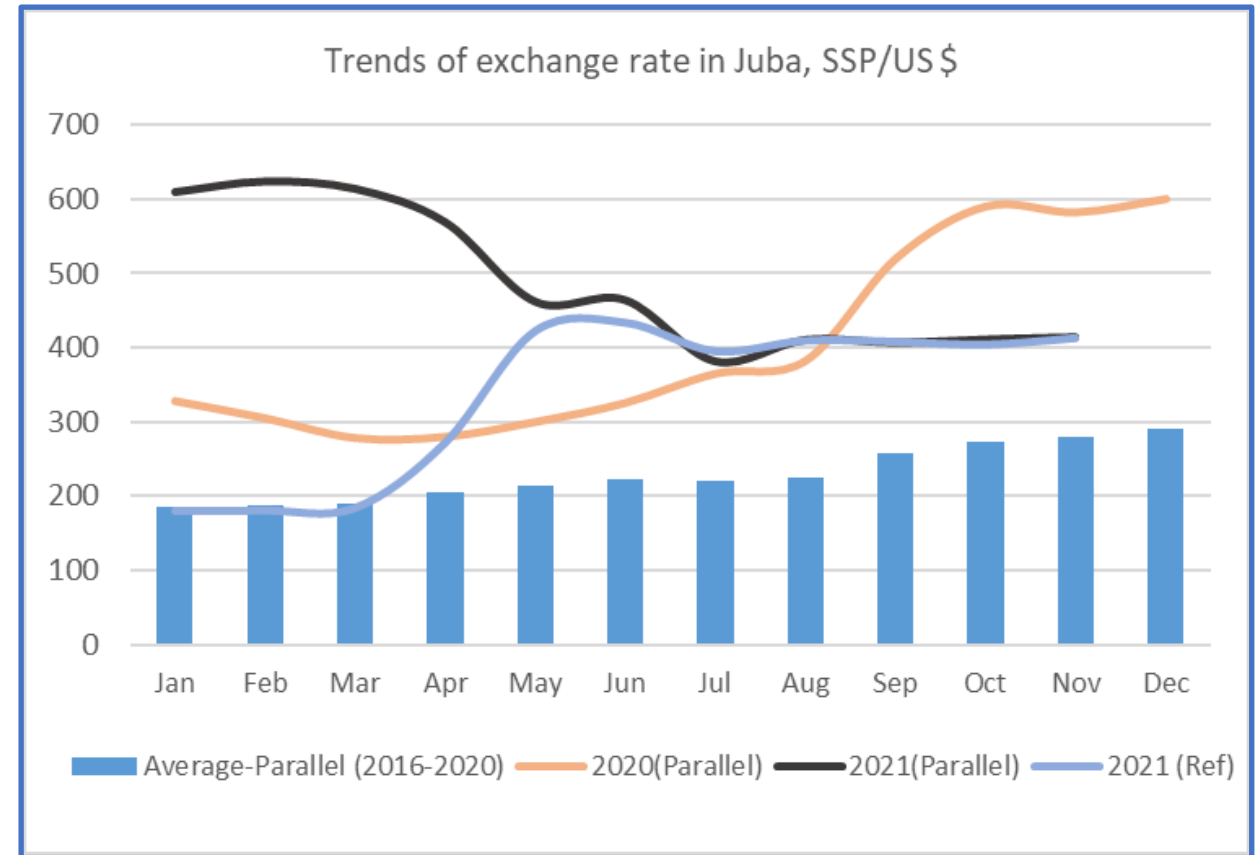
In November, daily wages of unskilled labor were sufficient to cover the cost of basket to meet the daily minimum energy requirements of a household of six family size in many of the markets. However, wage dependent households need to work everyday in order to ensure the economic access to food from the markets, as income from daily wages are insufficient to cover cost of food basket for the next day. The exception was in Upper Nile (Melut and Bunj) where the daily wages covered less than a daily cost of basket.

Exchange Rate Behavior

Traders in Juba, have two options in accessing the US dollars - formal financial institutions and/or parallel markets. The source of hard currency in other locations depends only on the parallel market.

Since August 2021, SSP to US dollar exchange rate continued to remain stable both in the parallel and official markets. The reference rate was exchanged on average at SSP 412, almost closer to 60% of depreciation against November 2020. The unified exchange rate and its determination on market values have contributed to the depreciation of the SSP.

In Juba, South Sudanese Pound exchanged in the parallel market on average at 415 per US dollar, about 40% appreciation as compared to the same month in 2020. The exchange rate in the remaining reference markets was ranging from as high as SSP 403 in Malakal and Aniet, and as low as SSP 422 in Mingkaman.



Price trends - as compared to November 2020

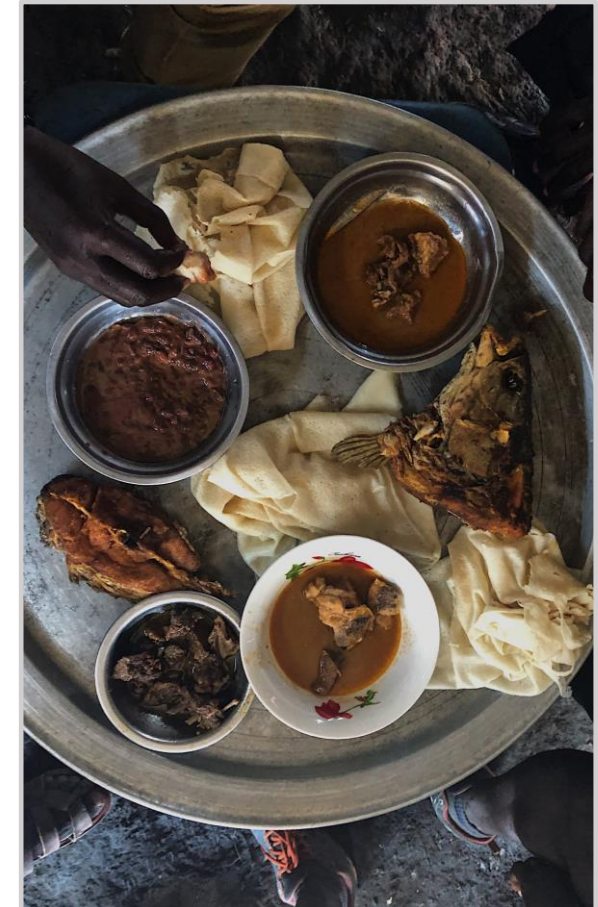
Cost of other goods remain unchanged due to stability of the local currency which has not uniformly impacted prices of sorghum across different markets. White sorghum prices were higher in Central Equatoria and Lakes (Rumbek) by 45% and 53%, respectively against November 2020. However, prices were lower in Warrap, Western Bahr el Ghazal, Northern Bahr el Ghazal and Lakes (Mingkaman) by 18 to 40%, though export from Sudan had been suspended for some time (see Table c for the details).

In Eastern and Western Equatoria, prices of beans (red) dropped, ranging from 30-55%, mainly due to the relatively better production in these areas coupled with stability of exchange rate. Markets in Central Equatoria, Lakes, Unity and Northern and Western Bahr el Ghazal have experienced moderate increase in prices of red beans.

Compared to November 2020, the purchasing power of livestock dependent households improved in Northern Bahr el Ghazal, Western Bahr el Ghazal, Warrap, Eastern Equatoria (Torit). The reason behind this improvement was mainly due to seasonal decrease in cereal prices and vice-versa in prices of goat.

Economic access of livestock owners for food from markets has deteriorated in flood affected markets of Unity (Rubkona) due to drop in goat prices and disproportionate increase in cereals prices. It was also noted a deterioration in purchasing power in Central Equatoria, Upper Nile (Bunj), Lakes and Western Equatoria, which has attributed to increase in cereals prices viza-a-viz goat prices.

Disproportionate increase in wage rate against cereals prices led the purchasing power of wage dependent households to improve in many of the reference markets. The exception was in Western Equatoria where terms of trade has deteriorated due to a drop in wage rates.



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Price trends - as compared to five-year average (2016-2020)

Compared to the five-year (2016-2020) monthly average, staple cereals (sorghum, maize, maize meal) prices have increased in all reference markets. The level of prices has doubled in many markets. Similarly, imported food items such as vegetable oil, sugar and beans (red) witnessed increase in their prices against the long-term average (**see Table c**).

Purchasing power of livestock dependent households deteriorated in Unity (flood affected area), Western Equatoria and Central Equatoria States, ranging from 40 to 80% against the long-term average, driven by the disproportionate increase in cereal prices. However, improved terms of trade were witnessed in Warrap, Lakes, Northern and Western Bahr el Ghazal states.

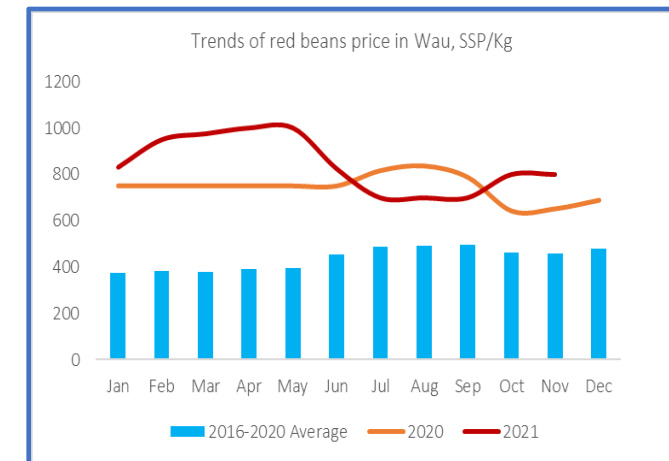
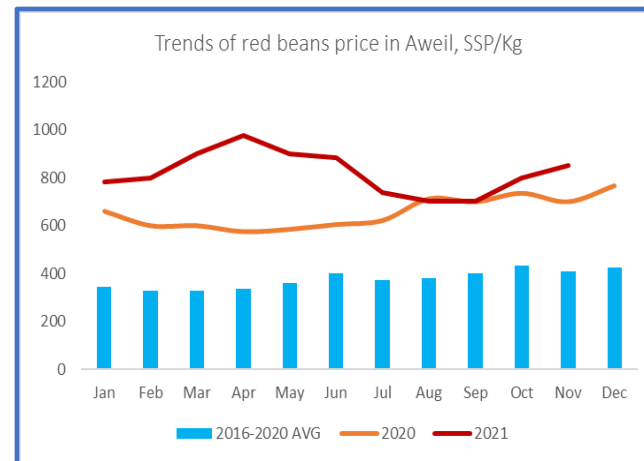
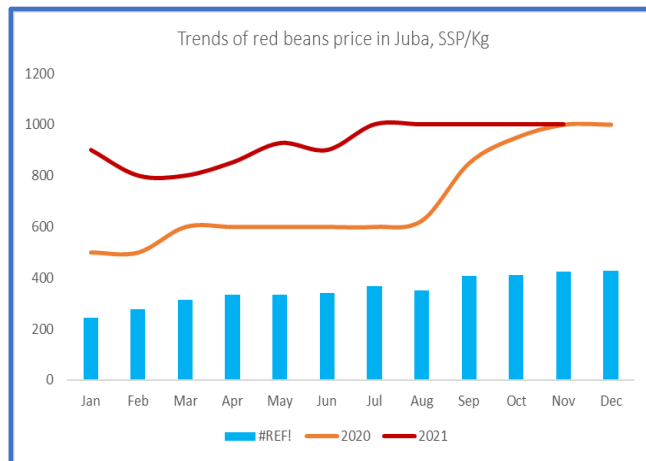
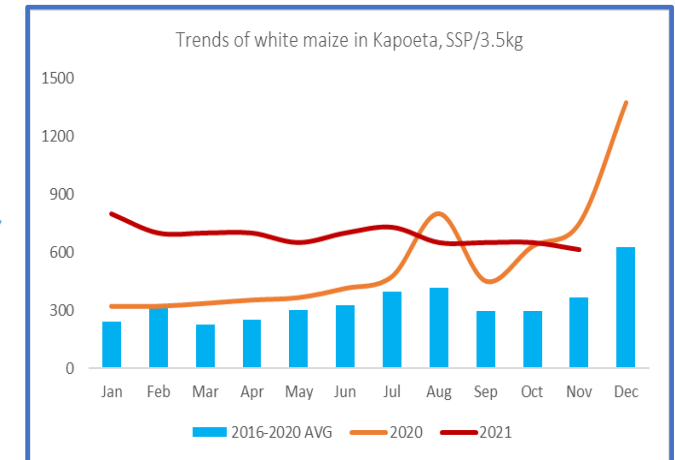
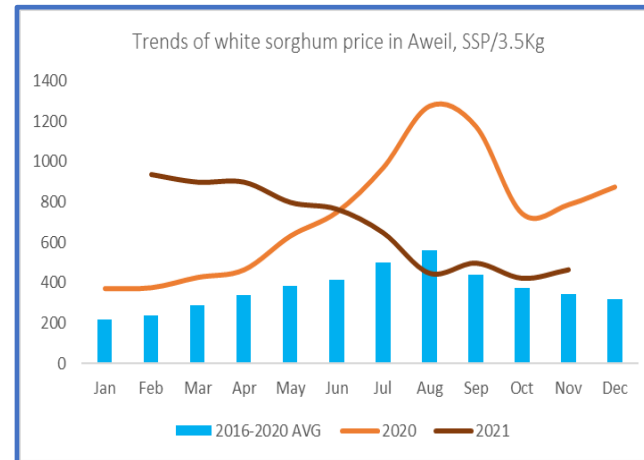
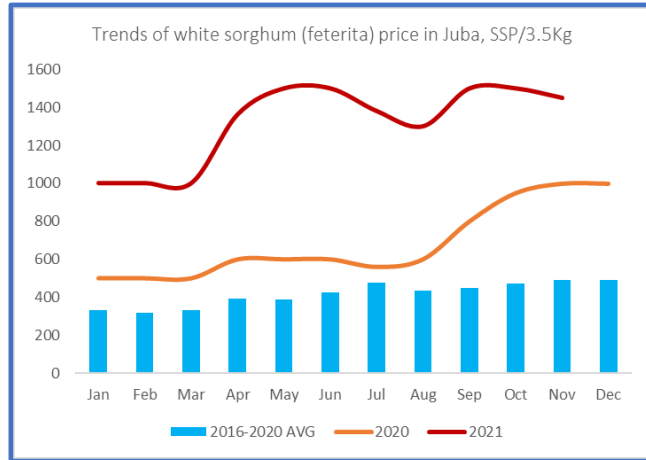
Lakes, Warrap, Northern and Western Bahr el Ghazal states markets witnessed improvement in purchasing power of labour dependent households, attributed to a significant increase in wage rates in the past five years. Though the wage rate increased in Upper Nile and Western Equatoria markets as well, it was easily absorbed by a sharp rise in cereal prices, leading the deterioration in purchasing power.



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Trends of retail prices



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Table A . Retail prices and percent changes in Juba

Cereals	Units	Nov-21	Oct-21	Nov-20	Average (2016-2020)	% changes as compared to		
						Oct-21	Nov-20	AVG (2016-2020)
Maize Flour	KG	500	425	450	216	18	11	131
Sorghum Flour	KG	500	500	350	350	0	43	43
White sorghum (feterita)	3.5 KG	1450	1500	1000	491	-3	45	195
White Sorghum (Local)	3.5 KG	1450	1500	900	600	-3	61	142
Brown Sorghum (Local)	3.5 KG	1450	1500	1000		-3	45	
White maize (Grain)	3.5 KG	1450	1500	1000	492	-3	45	195
Wheat flour	KG	500	500	513	244	0	-3	105
Rice	KG	600	700	613	311	-14	-2	93
Other Food								
Cowpea	3.5 KG	4500	4500	2750		0	64	
Foul el masri (broad beans)	KG	1375	1500	1738	667	-8	-21	106
Beans (janjaro)	KG	1000	1000	1000	423	0	0	136
Meat (Beef)	KG	3400	3400	2700		0	26	
Sugar	KG	500	500	500	325	0	0	54
Vegetable Oil	L	1000	1000	875	355	0	14	182
Salt	KG	200	200	213	149	0	-6	34
Terms of Trade								
Goat to white sorghum	#of malua	31.03	30.00	42.00	42.05	3	-26	-26
Goat	Head	45000	45000	42000	20645	0	7	118
Fuel and exchange rate								
Fuel - Diesel	L	365	355	325	191	3	12	91
Fuel - Petrol	L	373	355	325	200	5	15	87
Exchange rate (Parallel)	SSP/US \$	415	412	582	280	0	-40	33
Exchange rate (Reference)	SSP/US \$	412	404	179	138	0	57	67

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Table B. Retail prices of selected commodities

		Aweil	Bor	Jau	Kapoeta	Kuajok	Malakal	Rubkona	Rumbek	Torit	Yambio
White sorghum (3.5Kgs)	Nov-21	467		913		613	1400	550	600		
	Oct-21	425	1000	875		533	1400	600	575	500	
	Nov-20	788	900	1288	982	913		483	393		
	Average (2016-2020)	343	494	491	616	443	589	264	419	260	100
White maize (3.5kgs)	Nov-21	500	1000	725	613				700	500	683
	Oct-21	463	1000	713	650				650	525	700
	Nov-20	725		1275	750		1400		500	700	463
	Average (2016-2020)	314	300	496	364		1400		385	335	257
Maize meal (Kg)	Nov-21	475	400	400	400	400	800	571	700	250	467
	Oct-21	445	400	425	400	400	800	500	575	183	500
	Nov-20	463	613	340	463	550	600	583	435	270	313
	Average (2016-2020)	228	273	227	233	392	312	511	290	186	256
Red beans (Kg)	Nov-21	850	500	800	600		1500	857	1300	500	500
	Oct-21	800	500	800	600		1450	700	1000	500	500
	Nov-20	700	600	650	1200		800	767	450	700	1100
	Average (2016-2020)	210	314	456	548	386	418	655	306	316	375
Vegetable oil (L)	Nov-21	1033	1000	875	1000	1100	2000	1600	1050	900	2000
	Oct-21	1075	1000	950	1000	1100			1300	800	1800
	Nov-20	750	1000	1025	725	1000	1200	1000	470	800	988
	Average (2016-2020)	370	438	439	333	524	876	829	307	368	473

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Table C. Price changes in %: Nov vs Oct, Nov 21 Vs Nov 20, Nov 21 Vs Monthly Average (2016-2020)

		Aweil	Bor	Jau	Kapoeta	Kuajok	Malakal	Rubkona	Rumbek	Torit	Yambio
White sorghum (3.5Kgs)	Sep-21	10	-100	4		15	0	-8	4		
	Oct-20	-46	11	-32		-42		24	46		
	Average (2016-2020)	130	82	162	59	106		83	-6		
White maize (3.5kgs)	Sep-21	8	0	2	-6				8	-5	-2
	Oct-20	-31		-43	-18				40	-29	48
	Average (2016-2020)	59	233	46	68				82	49	166
Maize meal (Kg)	Sep-21	7	0	-6	0	0	0	14	22	36	-7
	Oct-20	3	-35	18	-14	-27	33	-2	61	-7	49
	Average (2016-2020)	108	47	76	72	2	156	12	141	34	82
Red beans (Kg)	Sep-21	6	0	0	0		3	22	30	0	0
	Oct-20	21	-17	23	-50		88	12	189	-29	-55
	Average (2016-2020)	305	59	75	9	-100	259	31	325	58	33
Vegetable oil (L)	Sep-21	-4	0	-8	0	0			-19	13	11
	Oct-20	38	0	-15	38	10	67	60	123	13	102
	Average (2016-2020)	179	128	99	200	110	128	93	242	145	323