South Sudan food security situation is still deteriorating, although there is improvement in January and February to April, 2020, compared to the same period last year with reduction of 9% in the proportion of population facing crisis or worse acute food insecurity.

The improvement is due to decline in conflict events and increase in the net production of national cereal in 2019/2020 which is above and near to five-year average than in 2018/2019. This is due to an increase in land cultivated with crop that resulted in high crops yield in areas not directly affected by the flood across the country, especially Greater Equatoria region, parts of Lakes State and Western Bahr el Ghazal state.

According to IPC January analysis, 5.29 million people (45.2%) are facing acute food insecurity. Out of which 1.11 million people faced emergency and about 40,000 people were classified in catastrophe.
in counties of Akobo, Duk and Ayod in Jonglei State.

In January 2020, IPC analysis projected that between Feb-April 2020, about 6.01 million people (51.4%) is expected to face crisis (IPC phase 3) or worse acute food insecurity situation, with 20,000 people in the counties of Akobo and Duk estimated to be in catastrophe (IPC phase 5). Despite relative improvement in food security, the severity of food insecurity is elevated in areas where flood and localized conflict occurred that lead to displacement of population and disruption of livelihood that has caused significant crop and livestock losses.

In addition, the ongoing economic crisis in the country has led to low purchasing power in the households and exacerbated food access and availability for the market dependant households.

The map above indicates from February to April 2020, a total of 22 Counties were projected to be in emergency (IPC phase 4), this includes almost all the Counties in Jonglei State with exception of Bor south and Pacholla Counties which are in crisis (IPC phase 3), Seven counties in Upper Nile State, three counties in Lakes State, and one county in the Northern Bahr El Ghazal state, East Equatoria State and Central Equatoria State.

There are 50 Counties that are likely to be in crisis (IPC phase 3) across the ten States while 6 Counties were likely to be in Stressed (IPC phase 2). Four of the stressed counties were projected to be in Western Equatoria State, one in Western Bahr el Ghazal State and one in Lakes State.

The general Nutrition situation in South Sudan during the post-harvest period of 2020 is critical and worse with the Global Acute Malnutrition (GAM) rate of 12.6% compared to the same period 2019 with Gam rate of 11.7%. According to the January, 2020 IPC analysis, a total of 1.3 million children under five years are expected to suffer from Acute Malnutrition (IPC-AMN) in 2020. This estimation was based on SMART nutrition surveys and admission trends for 2019 and the caseload for peak lean season data that provides higher caseload for better informed response planning.

Based on the IPC analysis results, all the 78 counties from 10 States of South Sudan are included in the Nutrition analysis. Out of the 78 counties of South Sudan, 48 Counties are classified as Serious IPC Acute Malnutrition Phase 3 and above compared
to 42 Counties of the same period last year. Twenty counties are classified as critical IPC-AMN Phase 4 in post-harvest season as compared to 12 counties of the same period in 2019. Improvements in the nutrition situation in South Sudan varies from one County to another across the country. This is especially in the States of Western Bahr el Ghazal and Western Equatoria which have shown substantial seasonal improvement in malnutrition while high malnutrition levels have remained high in the states of Jonglei and Upper Nile respectively.

The major drivers of Acute Malnutrition in South Sudan includes; high food insecurity, high morbidity and outbreaks, low dietary diversity in households, suboptimal childcare and infant and young child feeding practices, limited access to basic services and poor infrastructures.

Although there is a sign of security situation improvement in the Country during this period of projection with the ongoing implementation of revitalized peace agreement and formation of Transitional Government of National Unity, the IPC-AMN projected that the seasonal situation of acute malnutrition is expected to deteriorate during the lean season due to several factors including the seasonal changes of food access and availability in households, poor childcare and infants and young feeding practices, limited access to basic services due to poor infrastructures, increased morbidity and disease outbreak during rainy season.

The IPC Technical Working Group, NITWG (Nutrition Information Working Group) and Nutrition cluster with the relevant government line ministries including key implementing partners namely; FAO, UNICEF and WFP, recommended and urged all the stakeholders to take urgent action to respond to areas of the IPC-AMN Phase 4&3 and scale up to strengthening to existing response capacity and building resilience in areas of IPC-AMN phase 2&1 in addressing the underlying factors/drivers as mentioned above.

**MARKET OUTLOOK**

**SOUTH SUDAN MARKET PRICE TRENDS MONTHLY BULLETIN**

*Exchange Rate:* The South Sudanese currency against USD continued to increase in the last five years. In Juba, the average exchange rate within three months’ period of November 2019 to Jan 2020 continues to increase from 315 to 320 SSP per one US Dollar in the parallel market, while the official rate in Nov was 159.91 and in Jan 2020 was 159.97 SSP per US dollar respectively.

**Consumer Price Index(CPI) for South Sudan December 2019,**

*Annual Consumer price index*  
The annual growth in the consumer price index for South Sudan increased by 68.3 percent in December 2019 compared to 40.1 percent in December 2018. Food and non-alcoholic beverages increased by 102.1 percent from December 2018 to December 2019, while the prices for health decreased by 61.3 percent. Restaurants and hotels increased by 12.2 percent over the same period. The annual consumer price index decreased in Juba by 30 percent compared to Wau which is 31.7 percent from December 2018 to December 2019 while Malakal increased by 362.2 per cent in the same period respectively.  
The high prices of food and non-alcoholic beverages were mainly driven by higher price of oil and fats.
Figure 3: Juba index and Annual growth, Dec 2019

Source: NBS

Figure 4: Month-on-month growth, Dec 2019.

Source: NBS
Monthly consumer price index.

The monthly consumer price index decreased by 6.2% in Juba, and increased by 104.4% in Malakal and 10.1% in Wau respectively.
The increased of price for food and non-alcoholic beverages was mainly caused by high price of beverages.

South Sudan ten states market price are mainly monitored periodically every week to determine food availability and households’ ability to access food.

Cereal prices: Staple cereal prices and other food items were shown in figure 5 and 6, the price of maize and sorghum grains has increased in Upper Nile state, Central Equatoria (CE) state by 66 to 80 percent, while it has remained stable in other states markets. The price of maize flour has increased in Northern Bahr El Ghazal (NBG) state by 71 percent. In the same market trend, Western Equatoria (WE) and NBG state markets has witnessed a significant decrease by 20 percent of sorghum grain prices over the last three months as compared to other states markets. The same trends were experienced on maize grains prices in WE and NBG state market with a decrease of 37% maize, in the last three months as compared to the previous months. The price of field beans increased in three months of monitored markets, in CE by 40 percent; while it remained stable in the other States’ markets. Compared to one year ago, prices of cereal as well as field beans increased significantly in all monitored Markets.

Figure 5: Central Equatoria state commodities price selected market (Nov 2019 to Jan 2020)

Source: CLIMIS
Livestock

The livestock markets price within seventy-nine counties was indicating that larger increase was noted in Central Equatoria market by a rise of bull 72 percent, goat 59 percent, and sheep was noted 14 percent. A lowest decrease was observed in Jonglei state Markets of bull by 41 percent, goat 11 percent and sheep was noted 33 percent.

The increasing prices of livestock could be due to high demand for cereal for food among the people who are pastoralist that made them sell more animals to acquire enough cereals to meet their food demand. The situation of livestock market prices in Central Equatoria and Jonglei states were different from what has been experienced in the other states markets. In Central Equatoria, prices of cattle, goats and sheep increased by 72 percent for bull, 59 percent for goat and 14 percent for sheep due to increase in supply of livestock in the market. Similarly, cattle and goat prices remain relatively stable in Jonglei state market as from Nov 2019 to Jan 2020.

Source: CLIMIS
Terms of Trade (TOT)
Livestock to sorghum terms of trade has shown mixed trends in most markets. As indicated in figure (9), goat to sorghum TOT increased by 92 percent in W E State and increased by 66% in C E State. This has put the livestock households in a disadvantageous position in terms of the amount kgs of sorghum that they get from selling a goat, therefore they were receiving persistently more amount of sorghum in exchange for a goat. In that same period, the TOT markets had gone up in favour of livestock owners and has improved food security situation of most pastoral households.

Source: Climis

Figure 9: Former WE state TOT of Sorghum, to Goat price selected market (Nov 2019 to Jan 2020)

Goat: big size Grade 1 to Red sorghum grain: Western Equatoria

Source: Climis
According to the IPC analysis in January, 2020, the food security situation in Warrap state has been affected by flood which affected Crop production in large areas of the state especially where residents had planted late following the dry spell earlier in the season. There was absence of milk in the households as livestock migrate to distant grazing areas. Continued insecurity in Tonj East and Tonj South counties resulted into limited access to Markets, Agricultural land and fishing ground. 435,000 people, represented 36% of the population of the state are classified in crisis level (IPC Phase 3) or worse acute food insecurity. In the projection period from Feb. to April 2020, food security situation in Warrap state is expected to deteriorate significantly with 44% of population to be in Crisis (IPC Phase 3) or worse acute food insecurity, as food stocks start to deplete and livestock remain away from households in the grazing area, limiting access to livestock products such as milk and meat. Insecurity will likely continue to limit access to food sources in the affected areas. Markets are expected to remain an important source of food for Households, even though with the high commodity prices.

Food security situation in the state is classified at Crisis Level (IPC Phase 3) or worse acute food insecurity throughout the three Counties of the state. An estimated 200,000 people (31% of state population) are in crisis (IPC Phase 3) which represent a large improvement compared to Jan 2019 where 51% were in crisis (IPC Phase3). This improvement can largely be attributed to the relative stability of security situation which has enabled physical movement and trade flows. In addition, harvest have reportedly been good and households have access to fish and wild foods. High market prices remain a barrier to food access especially in Wau County, where there has been a decrease in proportion of household which engaged in agriculture with many households relying on causal Labour for income. In the projection period Feb. to April 2020, food Security is expected to deteriorate slightly with 36% of the residents in crisis IPC Phase 3 and above because of persistently high food prices with limited access to food from markets. However, security conditions are expected to remain stable allowing stability in food availability.

Most counties in the Northern Bahr el Ghazal State are classified under Crisis level (IPC Phase 3) acute food insecurity, in January, 2020 except Aweil North which is in Emergency level (IPC Phase 4). 55% of the state population experience Crisis (IPC phase 3) in January, 2020 compared to 57% same period last year. The drivers of the acute food insecurity in the State are high market prices and the destruction of crops by flood. All the counties in the state reported decrease in net cereals production Compared to 2018(CFSAM Report, 2019). Aweil North reported the most severe level of acute food insecurity in the state with 20% of the population having experienced Emergency (IPC Phase 4) acute food insecurity, due to low production rates and high market dependency. The food security situation in the state is expected to deteriorate during the period of Feb. to April 2020. Many Households are expected to exhaust food stocks during this period and increase dependency on natural resources, petty trade and humanitarian Assistant to mitigate food consumption gap.
Lakes State

Lakes State is classified at Crisis level (IPC Phase 3) acute food insecurity in January, 2020. Most of the counties showed a decline in the number of people experiencing emergency (IPC Phase 4) acute food insecurity in the state compared to the same period last year. The proportion of people in Crisis has decreased to 52% in January 2020 compared to 61% in January 2019. Yirol East, Yirol West and Awerial has experienced a slight improvement with 10% decreases in crisis (IPC Phase 3) or worse acute food insecurity. This is linked to the positive rainfall pattern that has improved harvest coupled with the relative stability in the State. Rumbek East, Rumbek Centre, Rumbek North and Cuibet counties have experience a relative decline in proportion of population in crisis (IPC Phase 3) or worse acute food insecurity. The relative decrease is less found in eastern Lakes Counties. High level of inter communal violence continue to disrupt livelihoods, this has put 25% of the population of Rumbek North in Emergency (IPC Phase 4) acute food insecurity.

The January, 2020 IPC analysis projected that from Feb- April 2020, livelihoods are expected to continue to be disrupted due to intercommunal violence and the situation remain to be in crisis (IPC phase 3) or worse acute food insecurity in Yirol East while Rumbek North is expected to remain in Emergency (IPC Phase 4).

Eastern Equatoria State

The food security situation in the state has improved in January 2020 compared to the same time of last year 2019. The improvement is being driven by improved security situation, availability of food stocks at the household level, livestock products, wild meat, and market access. Despite these improvements, food security still remain a constraints in the five counties of the state, that includes; Kajoeta North, Kajoeta East, Kajoeta South, Budi and Lopa/Lafon which are classified in crisis (IPC phase 3) or worse acute food insecurity due to high food prices, inter communal violence, cattle raiding, flooding and pest related crop losses.

In the projection period Feb to April 2020, food security situation is expected to deteriorate in all the eight counties of the state due to the expectation of high food prices, depletion of the foodstocks at the household level, seasonal limit of wild food availability and reduction in livestock products as livestock will migrate to grazing area.

An estimated of 465,000 people representing 43.5% of the population of the state will likely be in Crisis (IPC phase 3) or worse acute food insecurity during this projection period. Whereby two counties of the State that includes, Kajoeta North and Kajoeta south will be in Emergency (IPC phase 4) while the remaining six counties will be in crisis (IPC phase 3).

Unity State

There is significant improvement of food security situation in the state compared to the same period last year. An estimated 490,000 people representing 46.2% of the state population facing Crisis (IPC phase 3) or worse acute food insecurity as compared to 660,000 people representing 62.3% same period last year. This is as result of improvement in security situation in the state, commercial trade and humanitarian assistance delivery, improved production against the five years average across the state, which has increase food availability. The current improvement appears to be fragile and based on largely around unsustainable delivery levels of HFA. Two counties Mayom and Abienmhon were affected by floods and this is expected to have a longer lasting effect on market prices. It is projected that between February to April 2020, a seasonally driven deterioration is expected due to household’s cereal stocks depletion, and livestock that will migrate out due to lack of water and forage around the homesteads. However wild foods will likely be available even if households derive both food and income from fishing. All the nine counties continues delivering of significant amounts of planned and
funded Humanitarian food Assistant, will likely mitigate higher food consumption Gap and maintain Crisis (IPC phase 3) and emergency (IPC phase 4).

**Upper Nile State**

Food security situation is classified at Crisis level (IPC phase 3) across most of the counties in the state. The persistent acute food insecurity is attributed to the excessive flooding, limited livelihoods opportunities, high food prices, and limited access to markets. Sporadic incident of insecurity are also a contributing factors to the high level of food insecurity particularly in the areas of Eastern Counties of the State such as Maiwut. In January 2020, a typical post-harvest period in the state, an estimated 735,000 people, representing 53% of the state population are facing Crisis (IPC Phase3), during this period Maiwut, Longochuk, Ulang, and Maban are in Emergency (IPC phase 4). In Maiwut food security is driven by insecurity that resulted into Displacement, disruption of livelihood activities, and low crop production. In Longochuk, Ulang, and Maban, food insecurity is driven by excessive flooding that resulted in displacement, crop destruction, market disruption, and affected livestock.

In the projection period of Feb to April 2020, the food security situation in Upper Nile State will deteriorate further and an estimate 815,000 people, representing 59% of the population, are likely to be in Crisis (IPC phase 3). During this period, Longochuk, Nasir, Maiwut, Malakal, Manyo, Panyikang and Ulang are expected to be in emergency (IPC phase 4). A situation Driven by depleted stocks, high food prices, and reduction in the availability of livestock products as cattle move away from homestead in search of water and pasture.

**Jonglei State**

Food insecurity is widely spread across the state. Most of the counties are classified under Emergency level (IPC phase 4) during the post-Harvest period of January 2020, due to the effects of excessive flooding at the time when food availability would normally be the most abundant. Eight counties including Akobo, Ayod, Canal/Pigi, Duk, Fangak, Nyirol, Pibor and Uror are in Emergency (IPC phase 4), while cumulatively, in the counties of Akobo, Ayod, and Duk, an estimated 40,000 people are in Catastrophe (IPC phase 5)). Bor South, Pochalla and Twic East are experiencing Crisis (IPC phase 3) due to effect of flood. The floods had damaged homes and public infrastructure, destroyed crops, increase post-harvest losses, and restricts the gathering of wild foods that resulted in population displacement, disruption of markets, increase high food prices and significant loss of livestock due to diseases and starvation.

In the projection period of February to April 2020, 69.7% of the state population are likely to be in Crisis level (IPC phase 3) or worse acute food insecurity, Akobo and Duk counties will still have an estimated of 20,000 people in Catastrophe (IPC phase 5) due to continuation of the conditions that contributed to the existence of Catastrophe population in January 2020, which are further exacerbated by the earlier than normal seasonal depletion of stocks.

**Central Equatoria State**

The General food security situation in Central Equatoria State has improved significantly in January 2020, with an estimated 590,000 people (40.4%) in Crisis (IPC phase 3) or worse acute food insecurity in the post-harvest period as compared to 50% in January 2019. This improvement in food security conditions, is driven by improved security, trade and market recovery, better harvest due to above-average rainfall in 2019 based on preliminary CSFAM 2019/2020 data. In addition, household movement in search of food has improved in most parts of the state compared to last year 2019 with an exception of rural areas of Yei, Morobo, Kajo-keji and Lainya, where localized insecurity has persisted desiptes of ongoing revitalized peace implementation. However, food
consumption gaps, typical Crisis outcomes have persisted in all the six counties of the state. High food prices, localized insecurity limiting food access, increased returnees, floods and crop lost especially in areas of Mangala, Rokon and Terekeka are the major contributing factors of food insecurity.

In projection period of Feb to April 2020, relative calm is expected to prevail in most parts of the state, this will permit physical access to Market, fish, and wild foods. However, household’s food stocks are expected to deplete earlier and food prices are likely to remain high, limiting households access to food in the market, coupled with seasonal reduction of livestock products, expected inter communal conflicts and cattle raiding especially in Terekeka county. Five counties namely, YeI, Morobo, Lainya, Terekeka and Juba are expected to remain in Crisis (IPC phase 3) while Kajo – keji is likely to be in emergency level (IPC phase 4) due to returnees.

### Western Equatoria State

Food security situation in the state has improved due to persisted relative calm throughout 2019. From June to September 2019, rainfall was above average, crop production was higher based on preliminary CFSAM 2019/2020 data. As a result, the population Classified in Crisis (IPC phase 3) or worse acute food insecurity has reduced from 33% in January 2019 to 15% In January 2020 post-harvest period. In January 2020, an estimated 130,000 people, representing 15% of the state population are classified in Crisis level (IPC phase 3) or worse acute food insecurity including three counties, namely, Nagero, Mundri East, and Yambio due to high food prices, presences of Refugee and Returnees, and IDPs. Seven Counties that are classified in stressed situation (IPC phase2) include; Mvolo, Maridi, Tumbura, Mundri West, Ezo, Ibba and Nzara.

In projection Period of Feb. to April 2020, the food security situation is expected to deteriorate in more than half of the counties as food stock start to deplete and food prices remain high. Also an expected influx of returnees is likely to add pressure on the availability of food sources at household level during this period. Despite the revitalised peace implementation, some incidents of roads banditry are likely to persist, particularly along Juba to Mundri Road and Maridi to YeI Road limiting trade flow and Market supplies.