South Sudan Food Security Outlook

June 2020 – January 2021

July 22, 2020
Key Messages

• Crisis (IPC Phase 3) or worse outcomes are widespread during the 2020 lean season, driven by the loss of productive assets linked to conflict, poor macroeconomic conditions, and large-scale crop and livestock losses during the 2019 floods.

• Although most COVID-19 restrictions were lifted in May and the known spread of COVID-19 in rural areas is low, the direct and indirect impacts of COVID-19 on food security are contributing to declines in household income and purchasing power in urban and rural areas.

• At the peak of the lean season, the magnitude and severity of acute food insecurity is expected to increase as household food access becomes increasingly constrained by rising, high food prices. Food insecurity will likely be most severe in Jonglei, Lakes, Warrap, and Upper Nile.

• In the post-harvest period, food security is expected to marginally improve in many areas due to the main season harvest and seasonal milk, fish, and wild food availability. However, Emergency (IPC Phase 4) is expected to persist in conflict-affected or flood-prone areas of Jonglei, Warrap, Upper Nile, and Lakes.

• Catastrophe (IPC Phase 5) is possible among some households in localized areas in the 2020 lean season, given very limited capacity to cope with disruptions in access to markets, food assistance, or other food and income sources. However, the risk of Famine (IPC Phase 5) has declined.
National seasonal calendar

Source: FEWS NET
<table>
<thead>
<tr>
<th>PHASE 1</th>
<th>Minimal</th>
<th>Households are able to meet essential food and non-food needs without engaging in atypical and unsustainable strategies to access food and income.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHASE 2</td>
<td>Stressed</td>
<td>Households have minimally adequate food consumption but are unable to afford some essential non-food expenditures without engaging in stress-coping strategies.</td>
</tr>
<tr>
<td>PHASE 3</td>
<td>Crisis</td>
<td>Households either:&lt;br&gt;Have food consumption gaps which are reflected by high or above-usual acute malnutrition; OR are marginally able to meet minimum food needs but only by depleting essential livelihood assets or through crisis-coping strategies.</td>
</tr>
<tr>
<td>PHASE 4</td>
<td>Emergency</td>
<td>Households either:&lt;br&gt;Have large food consumption gaps which are reflected in very high acute malnutrition and excess mortality; OR are able to mitigate large food consumption gaps but only by employing emergency livelihood strategies and asset liquidation.</td>
</tr>
<tr>
<td>PHASE 5</td>
<td>Famine</td>
<td>Households have an extreme lack of food and/or other basic needs even after full employment of coping strategies. Starvation, death, destitution, and extremely critical acute malnutrition levels are evident. (For Famine Classification, area needs to have extreme critical levels of acute malnutrition and mortality.)</td>
</tr>
</tbody>
</table>

*Source: FEWS NET*
Current drivers of food insecurity
Intercommunal conflict is highest in Jonglei, Warrap, Lakes, and Unity.

Escalated in early to mid-2020 with significant negative impacts, displaced at least 60,000 people, and still persist.

- Pibor, fighting started in March, displaced 9,000 people, and is of highest concern with complete evacuation of humanitarian respondents and ongoing fighting in July; looting of prepositioned food assistance, and burning of homes.

- Uror, affected 23,000 people in Uror; 240 lives lost in late May; attacks in Bor South, Twic East and Duk.

- Lakes, displaced 2,025 people in Cueibet, March-April, 3000 displaced in late June to early July.

- Warrap, displaced 30,491 people in Tonj East and 18,547 people South.
  - Ongoing disbarment campaigns causing tensions.

- Raiding and counter raiding between youth from Twic of Warrap and Mayom of Unity, displaced 10,000 people, raided 20,000 cattle in late May.
  - Again in mid-July, youth from Twic of Warrap raided 200 cattle.
Continued localized political conflict despite peace deal

IDP and returnee population by state, March 2020

Source: data IOM DTM South Sudan

Localized political conflict persisted in parts of Central Equatoria

- Yei, Morobo, Lainya and Kajo-Keji of Central Equatoria of concern.
- Affected 30,000 people, 17,000 people displaced since January.
  - Disrupted markets, trade, and cultivation.
- Maiwut of UNS is also of concern due to continued armed activity-political in nature.
- 1.6 million people internally displaced based on initial IOM's Displacement and Mobility Tracking data round 8.
  - The highest number of internally displaced people (IDP) are found in Unity, Warrap and Upper Nile.
- 2.25 million people remained externally displaced as of May.
Low export earnings and import dependence continue to drive inflation

Official and parallel exchange rates, 2016 – 2020

Food inflation, 2016 – 2020

Source: CLiMIS

Source: Trading Economics and National Bureau of Statistics of South Sudan
COVID-19 daily case incidence declined in June, but spread likely higher than currently known.

Daily new confirmed COVID-19 cases as of July 21, 2020

COVID-19 Active cases in South Sudan, Number of Infected people, as of July 18, 2020

Source: data from WHO
COVID-19 can affect food security directly or indirectly

<table>
<thead>
<tr>
<th>Direct impacts on food insecurity</th>
<th>Indirect impacts on food insecurity</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Health shocks associated with difficulty earning income or engaging in productive livelihood activities</td>
<td>• Previous movement restrictions led to declines in business activity and labor demand, reducing household income</td>
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<tr>
<td>• Quarantine associated with loss of income and other productive livelihood activities</td>
<td>• Mandatory testing at border crossing points have slowed down trade flows, contributing to lower market supply and higher food and seed prices</td>
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<td>• Increase in expenditures on health-related costs or, at worst, funeral costs</td>
<td>• Decline in labor migration between NBeG and Sudan during the annual peak from January to May</td>
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<td>• Avoidance of health facilities or feeding/nutrition programs due to fear of COVID-19</td>
<td>• Lower demand for livestock from Sudanese traders</td>
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Total COVID-19 cases by state as of July 6, 2020

- Central Equatoria: 92%
- Eastern Equatoria: 2%
- Western Equatoria: 2%
- Lakes: 2%
- W Bahr el Ghazal: 2%
- N Bahr el Ghazal: 2%
- Warrap: 2%
- Unity: 2%
- Upper Nile: 2%
- Jonglei: 2%

Source: data from Africa CDC
Cross-border trade volumes through Nimule in Q2 2020 were similar to Q2 2019.

Nimule border crossing point: sorghum, maize grain, and maize flour trade volumes 2018 - 2020

Nimule border crossing point: change in trade volumes in 2020 compared to 2019 and 2018-2019 average

<table>
<thead>
<tr>
<th>Sorghum grain</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
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<tbody>
<tr>
<td>% change from 2019</td>
<td>+198%</td>
<td>+4%</td>
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<tr>
<td>% change from 2018-19 average</td>
<td>+321%</td>
<td>+84%</td>
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<table>
<thead>
<tr>
<th>Maize flour</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
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<tbody>
<tr>
<td>% change from 2019</td>
<td>+107%</td>
<td>+8%</td>
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<tr>
<td>% change from 2018-19 average</td>
<td>+179%</td>
<td>+56%</td>
</tr>
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Source: FEWS NET/CLiMIS
Informal cross-border trade volumes through Gok Machar and Warwar in Q2 2020 were below Q2 2019

Gok Machar and Warwar border crossing points: sorghum grain and wheat flour trade volumes 2018 - 2020

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<th>Gok Machar and Warwar border crossing points: change in trade volumes in 2020 compared to 2019 and 2018-2019 average</th>
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<tr>
<td><strong>Sorghum grain</strong></td>
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<tr>
<td>% change from 2019</td>
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<tr>
<td>% change from 2018-19 average</td>
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<tr>
<td><strong>Wheat flour</strong></td>
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<tr>
<td>% change from 2019</td>
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<tr>
<td>% change from 2018-19 average</td>
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Source: FEWS NET/CLiMIS
Market and trade route activity remains below normal, but is better compared to previous years.
Rising staple food prices are contributing to lower terms of trade and declining household purchasing capacity.

Price of a *malwa* (3.5 kg) of sorghum, 2016 - 2020

Casual labor wage-to-sorghum terms of trade, 2019 – 2020

Source: CliMIS
Despite favorable rains, bimodal crop production prospects reduced by low seed access and damage from desert locusts

- Farmers in the Kapoetas and Yei reported difficulty purchasing seeds due to high prices.

- **In Magwi**, over 60 percent of crop fields were invaded by desert locust. The greatest impact on food security could be in Magwi County compared to other assessed counties.

- **In Torit**, about 12 percent of crop fields were invaded by desert locust. Out of the eleven payams visited, only four recorded damage to crops.

- **Ikotos**: no noticeable damage, possibly the swarm did not settle in the crop fields.

- Damage to crops in other parts of Greater Equatoria not reported.

- No presence of **desert locusts** in GE as of July. New swarms in Kenya and Uganda are expected to migrate northwards across South Sudan to the summer breeding areas in Sudan.
First-harvest ongoing in Greater Equatoria, though lower than 2019 due to seed shortages and damage by desert locust, and insecurity

Seasonal progress, July Dekad 1

Above-average March to May/June rainfall performance favored crop production, but also resulted in flooding

- Crop (Maize) reproductive stage, and consumption began in late June in Eastern, Central and Western Equatoria.

- Flooding in Terekeka and parts of Juba, Bor South, parts of Twic East and Duk, Panyijiar and Kapoetas;

- Ministry of Humanitarian Affairs and Disaster Management issued local flood warnings to population to move to high grounds.

Source: FEWS NET
Onset of main season rains above-average in east, below-average in west

Cumulative rainfall as a percent of average, July 2020

Cumulative rainfall anomaly in millimeters, July 2020

=>5 to 45 percent above normal in east, and 5 to 30 percent below normal in the central and western areas.

=>Risk of flooding is likely to remain elevated at least September

=>10 to 100 mm higher in the east, 10 to 100 mm less in the central and western areas

=>Main season crop (sorghum) either germination or vegetative stages

Source: FEWS NET
Humanitarian food assistance reached 14 percent of the national population on average from March to May.

**Percent of total population reached, March-May 2020**

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<thead>
<tr>
<th>Region</th>
<th>March</th>
<th>April</th>
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Source: data from WFP

**Percent of kilocalorie needs delivered, March-May 2020**

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Source: data from WFP
Current food security outcomes

June 2020

IPC V3.0 Acute Food Insecurity Phase
1: Minimal  Would likely be at least one phase worse without current or programmed humanitarian assistance
2: Stressed
3: Crisis
4: Emergency
5: Famine

Source: FEWS NET
National Assumptions and projected outcomes
Assumptions

- June to September rainfall is most likely to be above-average in eastern South Sudan and average in western South Sudan.

- There is an elevated risk of flooding in low-lying, flood-prone areas along the Nile River and in the Pibor-Akobo-Sobat river basin in Jonglei.

- Household access to agricultural inputs is expected to be lower in 2020 than 2019 due to the impact of border closures, high food prices, and intercommunal conflict on the market supply of imported seeds and on household expenditures.

- Damage to crops by desert locust will likely be limited to Eastern Equatoria during the first season harvest. Desert locust are most likely to migrate to Sudan.

- Due to lower area planted, intercommunal conflict, and crop losses in flood-prone areas, the main season harvest is expected to be similar to or lower than 2019.
Assumptions

Population density exposed by flood hazard, 2019

Source: WFP

Source: FEWS NET

Source: WFP

Source: FEWS NET
Assumptions

• Political conflict is likely to be similar to 2019; intercommunal conflict is expected to be higher than 2019.

• There is limited will to re-instate more severe movement restrictions. Current movements restrictions are assumed to remain in place through at least September.

• Based on projected losses in oil export revenue, low foreign exchange reserves, and low capacity to service existing debt, the SSP is expected to further depreciate on the parallel market. However, the World Bank’s June 2020 forecast predicts inflation from July 2020 to June 2021 (40%) will be lower than July 2019-June 2020 (80%).

• The World Bank forecasts that private consumption expenditure is most likely to slightly contract (-1.5 percent) from July 2020 to June 2021 relative to the preceding year.
  
  • Since household labor income in urban areas is primarily associated with consumption expenditure, it is anticipated that household income from daily casual labor and petty trade in urban centers will largely recover compared to the March-May 2020 period and will be slightly lower than last year.

• Based on trade flow volumes in Q2 2020, cross-border trade flows from Uganda will most likely be similar to 2019 while trade flows from Sudan will most likely be lower than 2019.
Assumptions

• Retail staple food prices are most likely to rise and remain above the recent five-year average based on local currency depreciation; high transportation costs, including formal and informal taxes along routes; and varying trade flows.
  • Based on FEWS NET’s integrated price projections, the retail price of white sorghum in Bor South, Wau, and Juba is projected to range up to 65 percent above prices observed in 2019, peaking in September. In Aweil, prices are projected to range from 32 percent below to 16 percent above 2019 prices.

• Based on the rainfall forecast and levels of conflict, household access to fish and wild foods is broadly expected to follow seasonal trends. Fish availability is expected to reach a seasonal peak by October.

• As livestock begin to return to wet-season grazing areas near homesteads in June/July, milk availability will increase from June to November/December. Access will vary at the household level depending on livestock holdings.

• According to WFP, double distributions of food assistance are ongoing in June and July, targeting 2.8 million people. WFP’s August-January plan is not available, but food assistance typically scales down in the post-harvest period.
Most likely food security outcomes

June to September 2020

October 2020 to January 2021

Source: FEWS NET
The risk of Famine (IPC Phase 5) has declined

- Inter-communal conflict is periodic and localized in scale in Jonglei, Warrap, Lakes, and Unity.

- Large-scale populations have not been cut off for prolonged periods of time since 2017/18.

- Catastrophe (IPC Phase 5) is possible among at-risk households during the 2020 lean season.
  - Intercommunal conflict / the fear of conflict prevents engagement in productive livelihoods activities.
  - Severe floods, particularly in Jonglei, can temporarily cut households off from food sources.

- There is a declining likelihood that at least 20% of the population in a given area would sustain an extreme lack of food accompanied by extreme acute malnutrition and excess mortality due to hunger, indicative of Famine (IPC Phase 5).

Political conflict events, inter-communal conflict events, and fatalities in South Sudan, 2013-2020

Source: data from the Armed Conflict Location and Event Data Project (ACLED)