

Highlights

Petrol and diesel prices have increased across the country both at fuel stations and parallel markets. In March, diesel and petrol prices in the parallel market stood above 2 US\$/L across markets, except in Northern Bahr El Ghazal, which stood at 1.63 US\$ and at 1.86, respectively.

As compared to February 2022, petrol prices increased in Bunj, Malakal, Rumbek, Yida, Wanjok and Wau, ranging from 20 - 65%. Similarly, diesel prices showed upward trend in Rumbek (30%), Yida (12%) and Wau (67%).

Cost of basket to meet monthly minimum energy requirements increased in Kuajok (18%), Aweil (15%) and Bor (5%), attributed to changes in edible oil and cereal prices. The cost of basket fetched the least in Eastern Equatoria state (Kapoeta) at SSP 4680 and the peak in Malakal at SSP 9696. It costs double to meet the minimum energy requirements in Upper Nile state (Malakal) as compared to Eastern Equatoria state (Kapoeta and Torit).

White sorghum prices showed a rising trend in markets in Northern Bahr El Ghazal and Warrap states against February 2022, by 17% in Kuajok, 23% in Aweil and 67% in Wanjok. White sorghum at source markets (Kadugli and El Obeid in Sudan) also showed increasing trends.

Month-on-month price changes observed in Kapoeta, Kuajok, Malakal, Rumbek and Torit, ranging from 10% to 25%. Despite the global wheat price increase due to the crisis in Ukraine, wheat flour prices were not transmitted across markets in South Sudan. It could be associated to the fact that wheat flour is not a staple food, and additionally traders are selling existing stocks.

Average goat prices has dropped in Northern Bahr El Ghazal, Unity, Eastern and Western Equatoria states due to increase in supply of live animals. This has negatively affected the purchasing power of livestock dependent households in Aweil (22%), Bentiu (12%), Kapoeta (18%), Torit (8%) and Yambio (22%).

On average, one US dollar exchanged at 430.4759 South Sudanese Pound at commercial banks/forex bureaus, in Juba town. In the parallel market, the exchange rate fluctuated from SSP 425 to 435. The auctioning of the US dollars at the commercial banks maintained the stability of the currency market in the past one year.



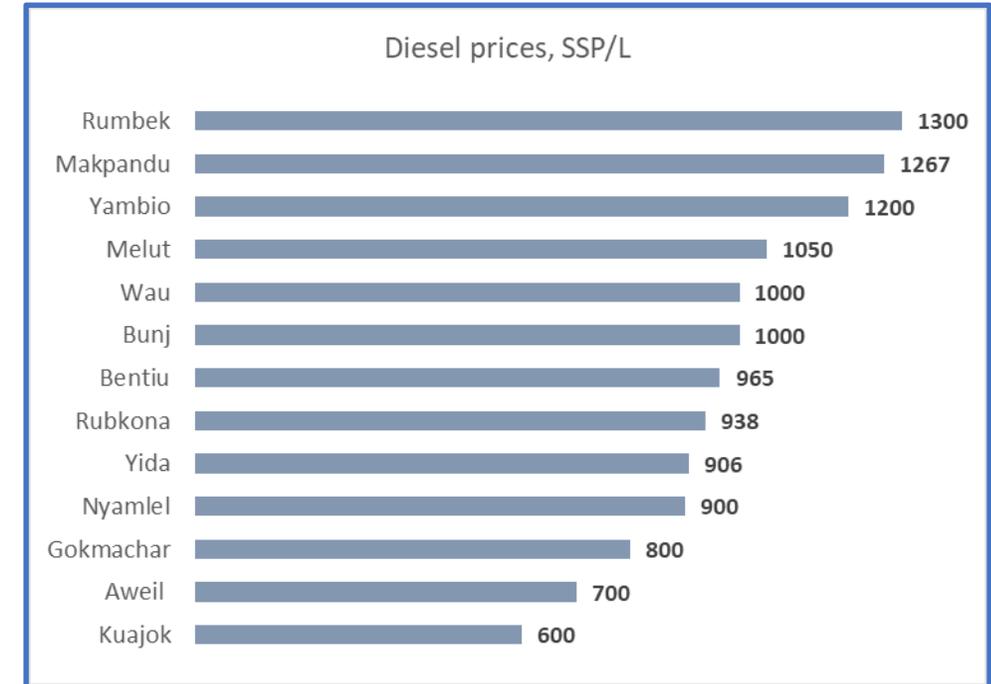
Fuel Prices: March vs February

Crude oil prices in the international market slightly fell (Last week of March) as Ukraine and Russia headed for peace talks, and on fears of a drop in fuel demand in China after the country began its most extensive coronavirus lockdown in two years to conduct mass testing and control a growing outbreak in Shanghai, the financial hub. However, the global oil benchmark Brent crude were trading at \$111.30 a barrel, on 29th of March 2022.

In South Sudan, petrol and diesel prices have increased across the country, both at the fuel stations and parallel markets, but prices vary from market to market subject to presence of formal fuel stations, insecurity along the trade routes, checkpoints payments, market inefficiencies and other factors.

In March, diesel and petrol prices in the parallel market stood above 2 US\$/L across markets, except in Northern Bahr el Ghazal, which stood at 1.63 US\$ and at 1.86, respectively. In areas where fuel stations functions such as Juba, Wau, Aweil and Rumbek, prices at the stations were relatively lower, ranging from 1.20 to 1.70. However, availability of fuel at all-times at the stations is limited to few markets, mainly in Juba.

As compared to February 2022, petrol prices increased in Bunj, Malakal, Rumbek, Yida, Wanjok and Wau, ranging from 20 - 65%. Similarly, diesel prices showed upward trend in Wau (67%), Rumbek (30%) and Yida (12%). The increasing trends of crude oil prices in the international markets contributed to the observed price changes coupled with other internal factors.

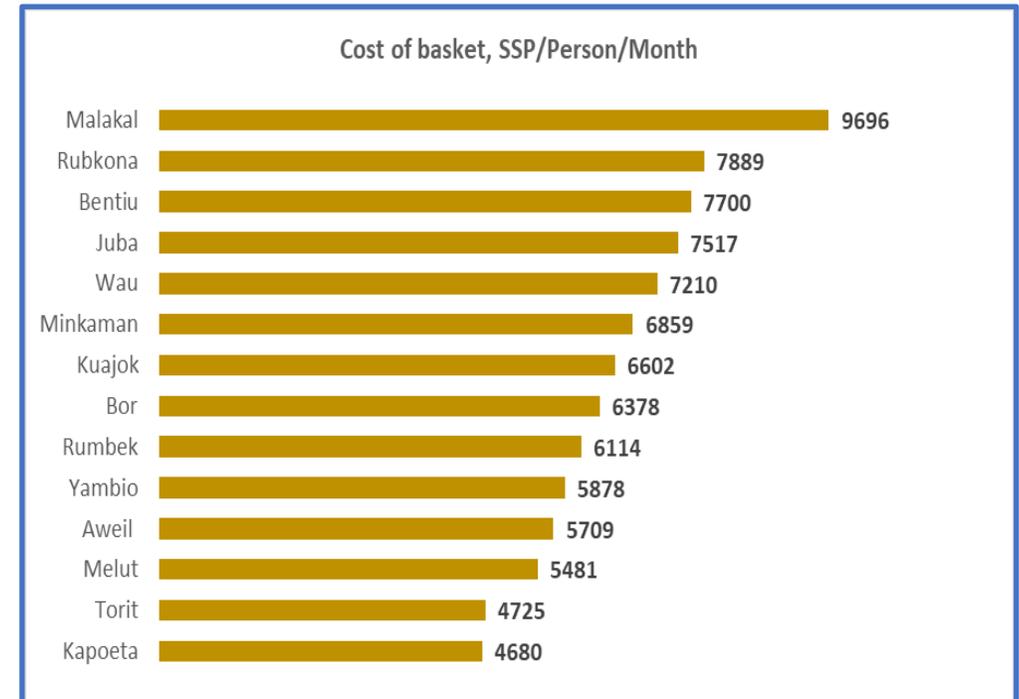


Cost of basket: March vs February

Cost of food basket per person/month (15kgs cereal, 1.5kgs pulse, 0.90 L cooking oil and 0.15 kgs salt) to meet monthly minimum energy requirements (2100 kcal) increased in Kuajok (18%), Aweil (15%) and Bor (5%), attributed to changes in edible oil and cereal prices.

In March, the cost of basket fetched the least in Eastern Equatoria state (Kapoeta) at SSP 4680 and the peak in Malakal at SSP 9696. It costs double to meet the minimum energy requirements in Upper Nile (Malakal) as compared to Eastern Equatoria state (Kapoeta and Torit). Such big variations attributed to many factors such as proximity of Eastern Equatoria to main supply sources (Uganda and Kenya) and its relatively lower transaction costs etc

Cost of basket witnessed stability in many of the reference markets as compared to February 2022, which has helped to maintain the same level of household's consumption, subject to the status quo in purchasing power.



Cereals and pulses prices: March vs February

White sorghum

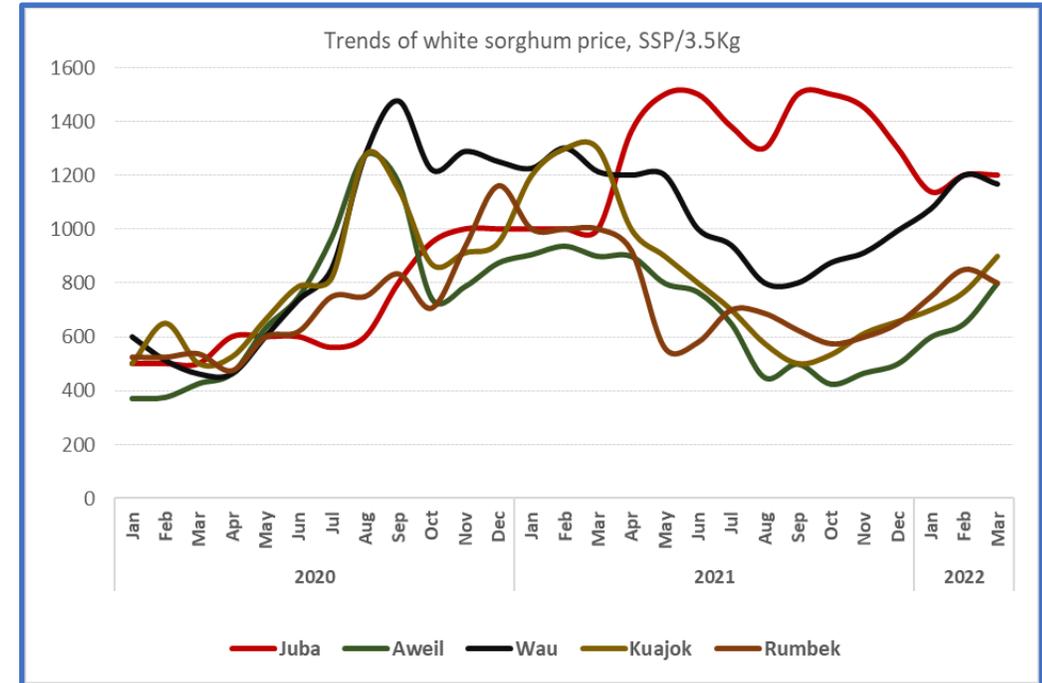
- White sorghum prices showed a rising trends in Northern Bahr El Ghazal and Warrap state markets against February 2022, increased by 17% in Kuajok, 23% in Aweil and 67% in Wanjok. These markets are supplied from Sudan (Kadugli and El Obeid) and prices of white sorghum at these source markets also showed increasing trends
- In Northern Bahr El Gahzal, traders are suspicious about the re-opening of the cross-border trade with Sudan (Majok Yinhthiu & Gokmachar), and hence they have engaged in hoarding goods, leading prices to increase. Additionally, the insecurity situation around Agok and Abyei has affected the smooth and normal flow of goods from Amiet to other markets in the north.
- White sorghum prices were the lowest in Aweil and Rumbek, at SSP 800/3.5kg, and fetched the highest prices in Malakal at SSP 1300/3.5kgs followed by Juba at SSP 1200/3.5kgs.

White maize

- White maize prices remain unchanged as compared to February 2022 across monitored markets. The situation has contributed to the same level of purchasing power, mainly in Greater Equatoria states where it is the main staple cereal. In March, white maize fetched the highest price in Malakal at SSP1400/3.5kgs and followed by at SSP1200/3.5kgs in Juba .

Maize flour

- Maize flour becomes one of the most imported and traded cereal products in urban centers. Overall, prices were stable at elevated levels, however, maize flour price trended up in Kuajok (20%), Makpandu (14%) Rumbek (13%) and Rumbek (6%) against February 2022.



Cooking Oil, Beans and Wheat Flour: March vs February

Cooking Oil:

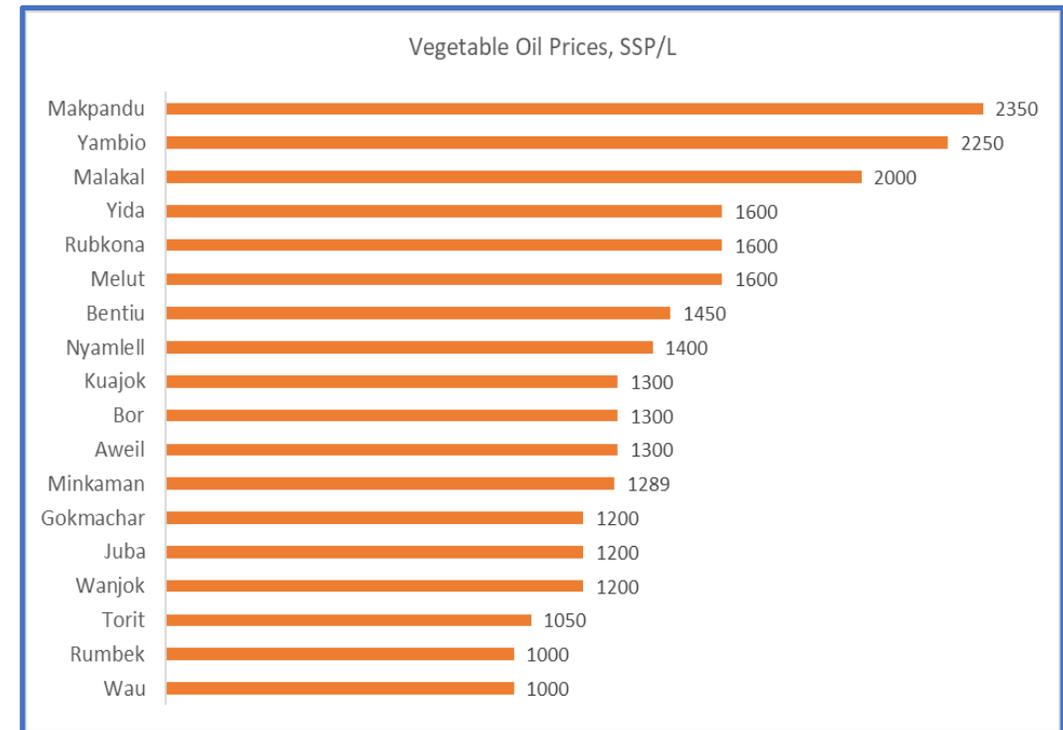
- Month-on-month comparison shows about half of monitored markets (Aweil, Bor, Juba, Kuajok, Mingkaman, Torit, Yambio, Gokmachar, Nyamlell and Wanjok) witnessed an increase (10-40%) in cooking oil prices. Disruptions of the normal flow of goods from Sudan compounded by high transaction costs including high fuel prices contributed to the changes.
- In March, one litre of cooking oil traded from US \$ 2.2 to 3.80 in many of the reference markets. However, cooking oil prices peaked the highest in Makpandu (5.46 US\$), Yambio (5.23 US\$) and Malakal (4.65 US\$).

Beans (red):

- Overall, beans (red) price were stable to the level one month ago. On the contrary, beans price dropped (10-25%) in Aweil, Bunj and Rumbek markets, which could be linked to quality differences, otherwise, it is unseasonal to observe such changes at the verge of the lean season.

Wheat flour:

- Month-on-month price changes observed in Kapoeta, Kuajok, Malakal, Rumbek and Torit, with an increment of 10 to 25%. Despite the global wheat price increases due to the crisis in Ukraine, wheat flour prices were not transmitted across markets in South Sudan. Additionally, traders are selling available stocks from previous purchases.



Terms of Trade (TOT): March vs February

Goat to cereals:

- Increased supply of live animals into the markets led the price of goat to fall in Northern Bahr El Ghazal, Unity, Eastern and Western Equatoria states. Thus, the purchasing power of livestock dependent households deteriorated in Aweil (22%), Bentiu (12%), Kapoeta (18%), Torit (8%) and Yambio (22%).
- Economic access of livestock owners slightly improved (less than 10%) in Mingkaman, Rumbek and Malakal, attributed to a stable goat prices and a proportionate decrease in white sorghum prices.
- In March 2022, one average sized goat failed to cover the amount of cash required to purchase a standard food basket that meets a household (6 family size) monthly minimum energy (2100 kcal) requirements.
- Households in Greater Equatoria (except Torit), Greater Warrap and Upper Nile must sell two and more goats to cover monthly minimum energy requirements. In Jonglei and Lakes (Rumbek), an average sized goat managed to cover the monthly cost.

Wage to cereals:

- Slowdown in economic activities has negatively affected wage rates of unskilled labor. Employment opportunities are constrained by the long-standing economic crisis, and it is impacting wage dependent households to get job everyday to meet their needs.
- Wage to cereal terms of trade dropped in Torit, Yambio, Aweil (10-35%) due to stable wage and an increase in cereal prices. However, moderate increases in wage rate led the purchasing power of wage dependent households to improve in Wau (14%) and Kuajok (28%).
- In March, daily wage rate has covered cost of basket in many markets, except in Mingkaman and markets in Upper Nile state where it was not sufficient to cover household daily cost of basket.

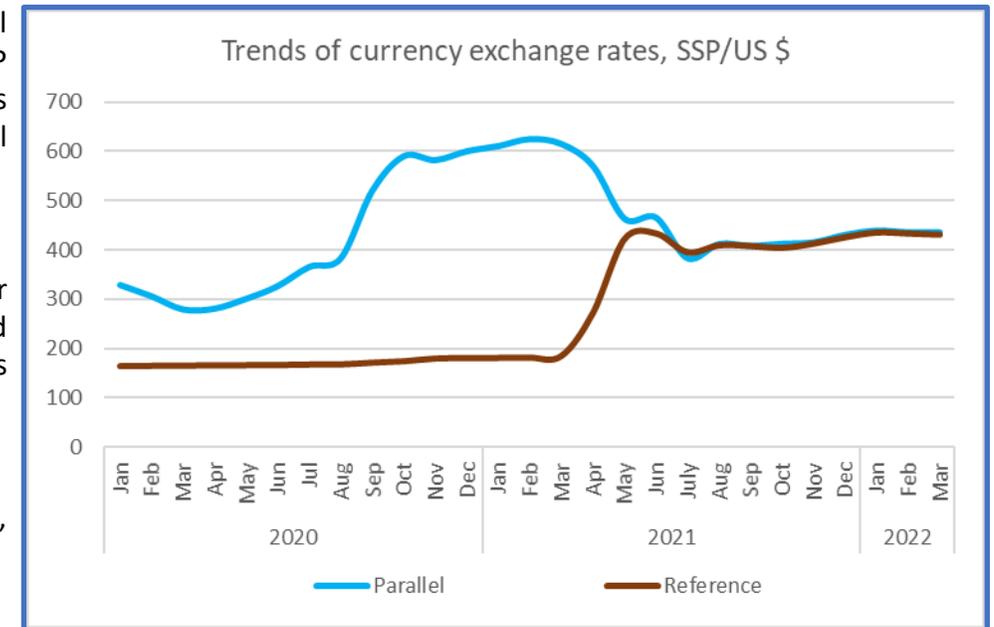


Exchange Rate Behavior

On average, one US dollar exchanged at 430.4759 South Sudanese Pound at commercial banks/forex bureaus, in Juba town. In the parallel market, the exchange rate fluctuated from SSP 425 to 435 per US \$. Since April 2021, auctioning of the US dollars at the commercial banks maintained the stability of the currency market. Auction of the US dollars is limited to the capital Juba.

In March 2021, the South Sudanese Pound exchanged at the second lowest rate, at SSP 615 per one US dollar. Then, following the auctioning of the US dollars through commercial banks and consequent reforms, the exchange rate appreciated, and the divergence between the two rates has been cleared.

The parallel market exchange rate in other reference markets varied from at SSP 430 in Aweil, Rumbek, Melut to the lowest at SSP 450 in Yambio and Makpandu markets.



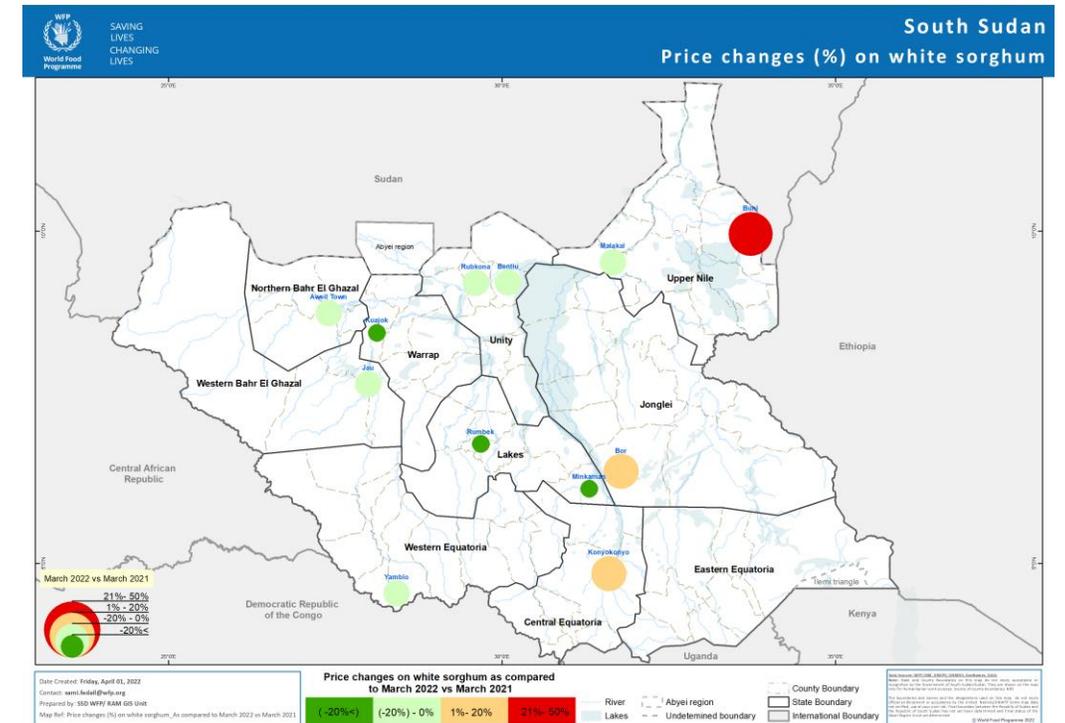
Price trends - as compared to March 2021

As compared to March 2021, retail prices of staple cereals and cereals products have largely dropped, attributed to the appreciation of South Sudanese Pound and other interlinked factors. White sorghum prices dropped by 10 to 30% in Aweil, Kuajok, Malakal, Mingkaman, Rumbek markets. Additionally, white maize prices dropped in Torit, Kapoeta and Wau, by 15 to 30%.

Beans are one of the commonly consumed pulse across households in South Sudan. The retail prices of beans (red) showed mixed trends – dropped in about half of the reference markets and it has trended upward in the remaining markets. Markets located far from the supply sources (Uganda and Juba) have experienced increased beans prices.

Purchasing power of livestock dependent households deteriorated in Juba, Rubkona, Kapoeta and Yambio due to decreased goat prices. However, the terms of trade have improved in Wau, Rumbek and Kuajok due to the combined impact of increase in goat prices and marginal drop in cereal prices.

Increase in wage rate (Wau, Rumbek) coupled with drop in cereal prices contributed to an improvement in purchasing power of wage dependent households in Aweil, Rubkona, Yida and Malakal, ranging from 15-65%. On the contrary, the purchasing power has deteriorated in Mingkaman (12%) due to fall in wage rate and cereal prices, and as well in Yambio (14%) due to an increase in cereal prices.



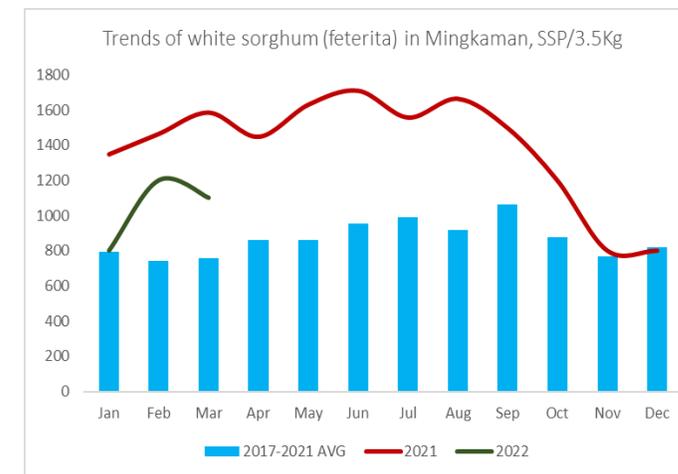
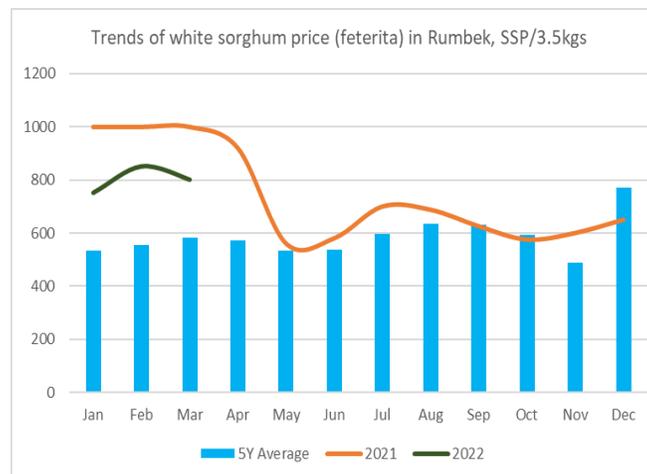
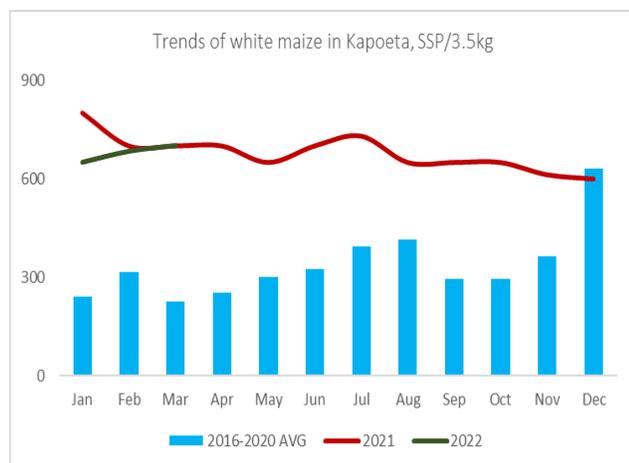
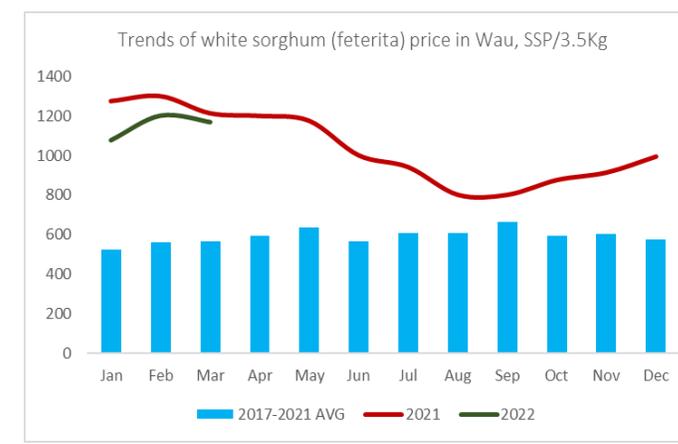
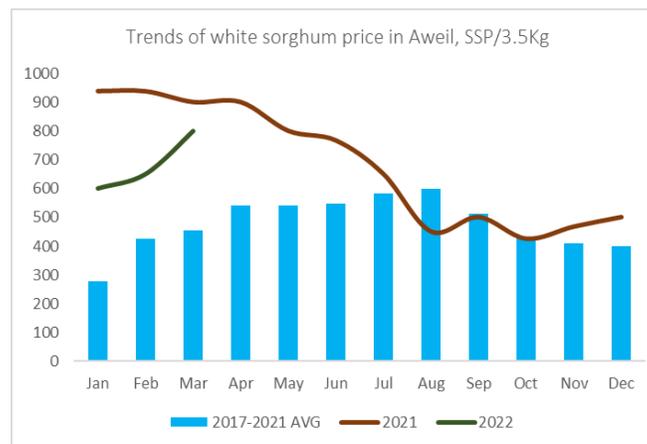
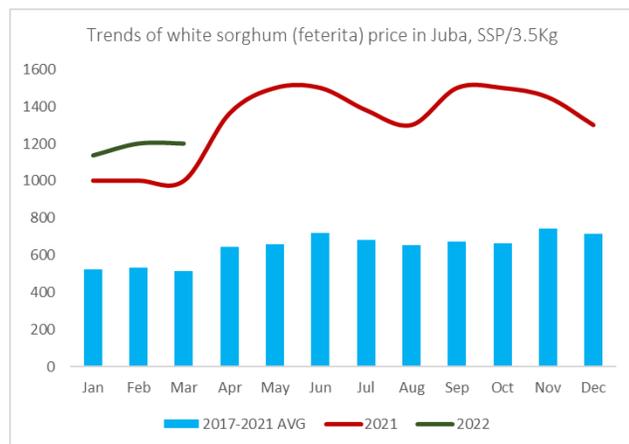
South Sudan – Monthly Market Prices

March 2022



vam
food security analysis

Table a. Trends of retail prices



South Sudan – Monthly Market Prices

March 2022



vam
food security analysis

Cereals	Units	Mar-22	Feb-22	Mar-21	Average (2017-2021)	% changes as compared to		
						Feb-22	Mar-21	AVG (2017-2021)
Maize Flour	KG	500	500	479	277	0	4	81
Sorghum Flour	KG	500	500	458	351	0	9	42
White sorghum (feterita)	3.5 KG	1200	1200	1017	477	0	18	152
White Sorghum (Local)	3.5 KG	1267	1300	1002	568	-3	26	123
Brown Sorghum (Local)	3.5 KG	1300	1350	1487	1080	-4	-13	20
White maize (Grain)	3.5 KG	1200	1200	894	433	0	34	177
Wheat flour	KG	550	533	688	342	3	-20	61
Rice	KG	500	500	731	374	0	-32	34
Other Food								
Cowpea	3.5 KG	3150	3150	1832	1209	0	72	161
Foul el masri (broad beans)	KG	1200	1133	1005	633	6	19	90
Beans (janjaro)	KG	833	805	872	440	3	-4	89
Meat (Beef)	KG	3400	3400	1881	1545	0	81	120
Sugar	KG	400	400	612	362	0	-35	10
Vegetable Oil	L	400	1000	1298	576	-60	-69	-31
Salt	KG	1200	350	429	247	243	180	386
Terms of Trade								
Goat to white sorghum	#of malua	37.50	37.50	28.33	32.95	0	32	14
Goat	Head	45000	45000	28810	15717	0	56	186
Fuel and exchange rate								
Fuel - Diesel	L	550	533	500	287	3	-11	92
Fuel - Petrol	L	560	560	500	291	0	204	92
Exchange rate (Parallel)	SSP/US \$	435	435	615	305	0	0	30
Exchange rate (Reference)	SSP/US \$	430	433	184	149	0	-1	65

WFP prices database can be accessed from: https://dataviz.vam.wfp.org/economic_explorer/prices