

South Sudan – weekly market prices

Fourth Week July 2020



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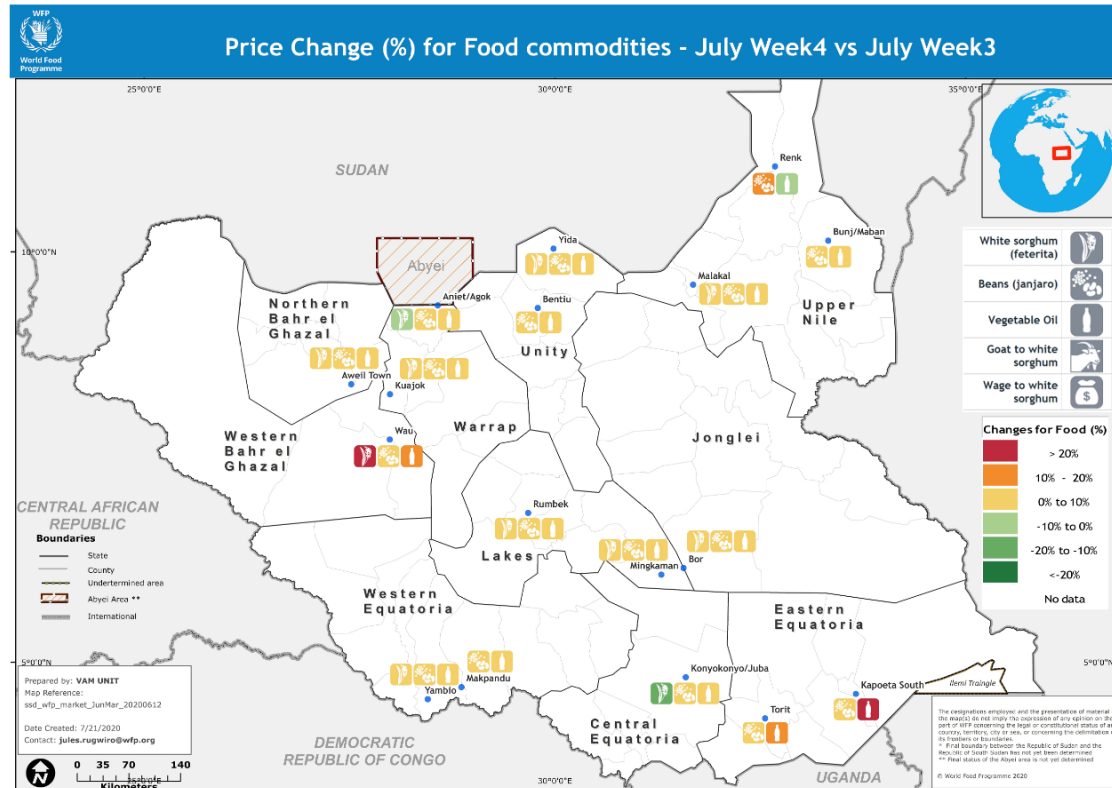
Highlights

- **The South Sudanese Pound (SSP) remains at low value against the US dollar (\$).** On the parallel market in Juba, **one \$ was exchanged at SSP 355**, remaining the same as during the 3rd week of July 2020.
- During the 4th week of July, **retail prices of cereal remained stable but at elevated levels** in many of the monitored markets. **Cereal prices in markets such as Juba and Aniet experienced unseasonal decrease**, within a range of 6 to 17%.
- **Compared to the 3rd week of March 2020, when borders were closed to prevent the spread of COVID19, prices of food commodities across markets have risen considerably.** In addition to COVID-19 restrictions, factors like seasonal rains coupled with depreciation of local currency and exhaustion of stocks from the recent harvest play a role.
- Given the disproportionate increase in cereal prices against daily wage of casual laborers, **the purchasing power of labor dependent households dropped across markets against the 3rd week of July.** The slowdown in economic activities and less demand for casual workers were the main drivers for the observed drop in wage rates.
- The average prices of food items witnessed upward trends as compared to the fourth week of July 2019.

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Week-to-week price variations:



The South Sudanese Pound (SSP) remains at low value against the US dollar (\$). On the parallel market in Juba, **one \$ was exchanged at SSP 355** during the 4th week of July 2020, remaining the same as during the 3rd week of July 2020. A depreciation effect has been observed across markets in different states, with the exchange rate ranging from SSP 320 in Yambio to a record high SSP 370 in Wau. The depreciation of the SSP is expected to further aggravate the hike in prices of imported food commodities (purchased with hard currency on regional markets) at this peak of the lean season.

During the 4th week of July, **retail prices of cereal remained stable but at elevated levels** in many of the monitored markets. **Cereal prices in markets such as Juba and Aniet experienced unseasonal decrease**, within a range of 6 to 17%. According to key informants, this is mainly attributed to the drop in prices in the source market of Kampala, Uganda, that results from decreased demand as, on one side, institutions and schools have suspended bulk purchases of food items, due to COVID-19, while, on the other, households have reduced dependency on markets thanks to the cereal harvest is some parts of the country. There is a drop in food items demand in Juba by hotels and restaurants, coupled with the seasonal availability of green harvest, mainly maize. Even though Juba supplies most markets in the country, the **drop in cereal prices has not been transmitted to other recipient markets across the states**, probably because of high transportation costs, considering poor road conditions in the rainy season.



Week-to-week price variations:

As compared to the previous week, **price were observed being on the rise in other markets across South Sudan: in Wau and Kuajok**, the price of white sorghum increased as did that of maize flour in **Kapoeta, Kuajok, Mingkaman and Wau**, and that of wheat flour in **Kapoeta, Kuajok, Mingkaman, Torit and Wau**. According to local informants, this increase in prices was associated to the depreciation of the SSP, combined with increased market dependency by households because of depletion of household's own stocks, and the deterioration of roads by the heavy seasonal rain which led to supply constraints and high transport cost.

The prices of pulses showed a seasonal upward trend in many markets. A kilogram of red beans, the locally preferred variety of pulses, which are partially sourced from Uganda and in part cultivated locally, reached on average, the value corresponding to 3 kilograms of cowpeas. As a result, poor and very poor households are resorting to cowpeas, which are less preferred though have a similar nutritional value. However, during the 4th week of July, retail prices of both pulses rose: cowpeas prices rose in Kapoeta (37%), Yambio (31%), Mingkaman (5%) and Makpandu (4%), while red beans prices increased in Renk (20%), Kuajok (6%), and Wau (4%).

Similarly, the prices of industrial processed food such as vegetable oil and sugar increased. Vegetable oil prices increased in Kapoeta (25%), Torit (19%), Wau (15%), Kuajok (6%) and Juba (4%); sugar prices in Bentiu (32%), Torit (20%), Kuajok (14%), Wau (11%) and Yambio (7%). As sugar and vegetable oil are imported items, the depreciation of local currency has direct implications on their prices in the local markets, and leads to traders adjusting their selling price on the available stocks as well. Moreover, increased transportation costs are reflected in higher, final prices.

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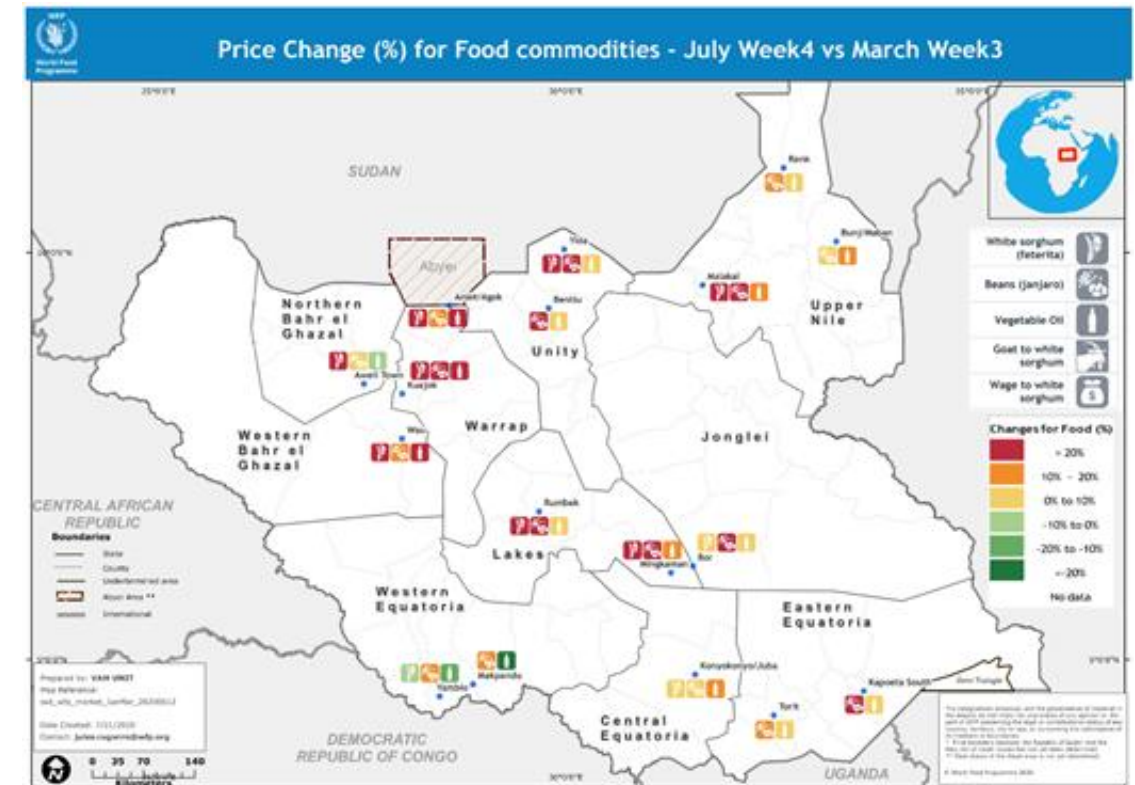
Post COVID-19 price variations:

Compared to the 3rd week of March, when borders were closed to prevent the spread of COVID-19, prices of food commodities across markets have risen considerably. In addition to COVID-19 restrictions, factors like seasonal rains coupled with depreciation of local currency and exhaustion of stocks from the recent harvest play a role. The price of imported white sorghum (feterita) increased on average by 60%, with Aweil and Yida markets showing highest rise, respectively by 163% and 140%. Similarly, the average prices of local white sorghum increased by 66% and brown sorghum by 53%. This is mainly to an increased demand of local sorghum, which is the staple poor households resort to given prohibitive prices of feterita.

In Kapoeta and Yambio, a hike in prices of maize, the staple food in these areas, has been observed as compared to 3rd week of March, by 71% and 82%, respectively.

As for pulses, the average price of cowpea, fava beans and red beans spiked by 37%, 19% and 22%, respectively within four months period. Apart from Maban and Bentiu, where prices of pulses remain unchanged, all monitored markets experienced notable increases in prices: red beans' price increased within a range of 5% in Aweil to a maximum of 89% in Rumbek.

Similarly, sugar prices increased across markets on average by 26%, and vegetable oil by 7%. However, few markets experienced a drop in prices of vegetable oil, such as Yambio (-17%) and Makpandu (-30%) in Western Equatoria, Aweil (-7%) and Bentiu (-13%). In Western Equatoria, the observed drop in vegetable oil could be associated to households shift to locally processed oil as imported oil becomes expensive. In the case of Bentiu, the distribution of humanitarian food assistance could be one of the reasons behind a relative stability of oil price.

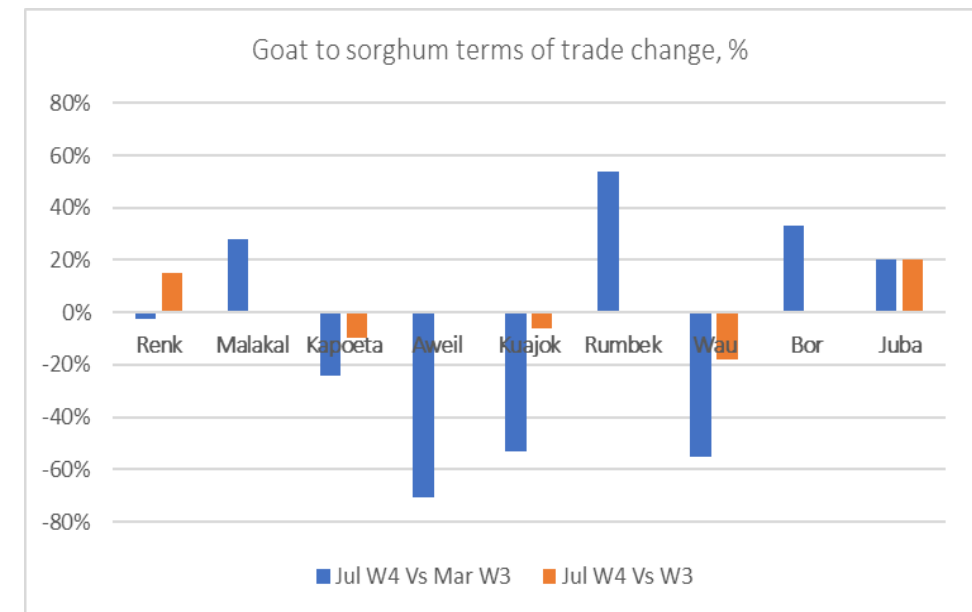


Terms of Trade:

An increase in prices of goat coupled with stable cereal prices led **terms of trade to improve as compared to 3rd week of July 2020 in Renk, Mingkaman, Aniet, Torit and Makpandu** within a range of 5% in Torit to a maximum of 23% in Aniet. **In Juba, the terms of trade have improved due to a decrease in the price of cereal, while the price of goat has remained stable.**

Though COVID-19 restricted the movement of livestock to markets, an increased demand of goats and cows for consumption during the Eid Al Adha festivity at the end of July contributed to the increase in prices of live animals in some of the monitored markets. Additionally, as livestock supply to Torit has been affected by the insecurity along the trade route, reduced supply led to increase in prices of goat and ultimately improvement in terms of trade. On the contrary, terms of trade dropped in Kapoeta (10%), Rubkona (30%), Kuajok (6%) and Wau (18%) due to the rise in prices of cereals. In Yambio, an increased supply of live animals to be exchanged with food items depressed goat prices and led to the deterioration in terms of trade by 29%. The terms of trade in the remaining markets remained stable.

Given the disproportionate increase in cereal prices against daily wage of casual laborers, **the purchasing power of labor dependent households dropped across markets against the 3rd week of July.** The slowdown in economic activities and less demand for casual workers were the main drivers for the observed drop in wage rates.

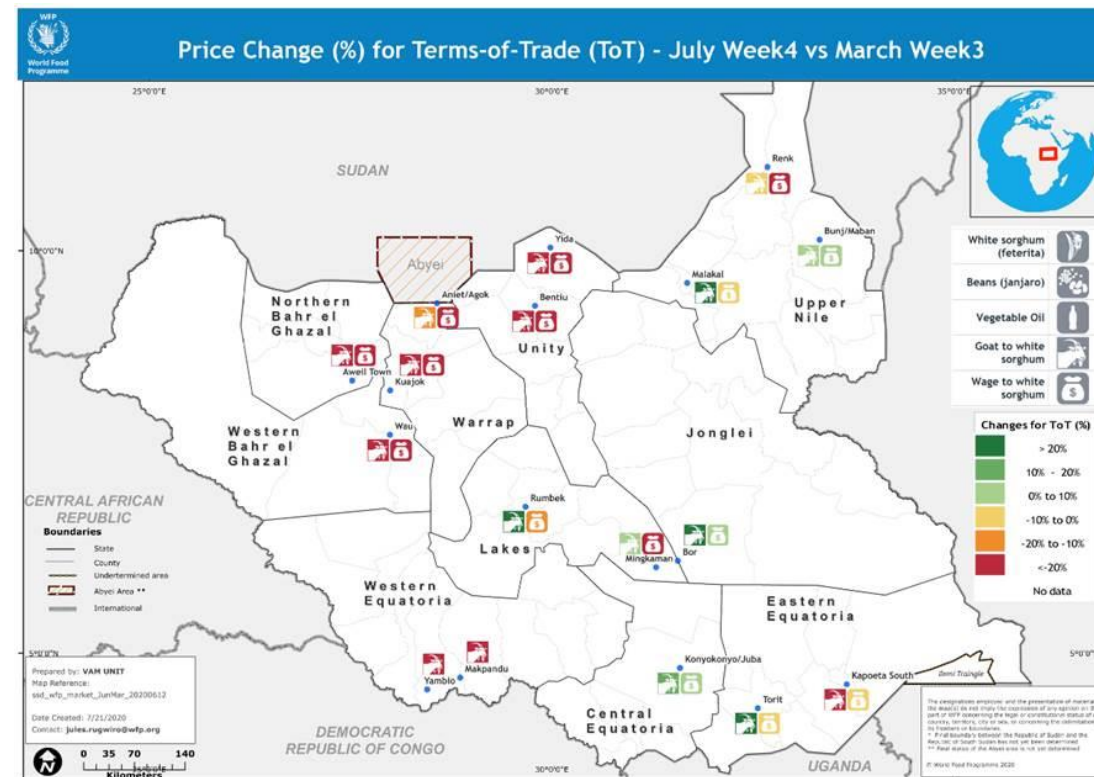
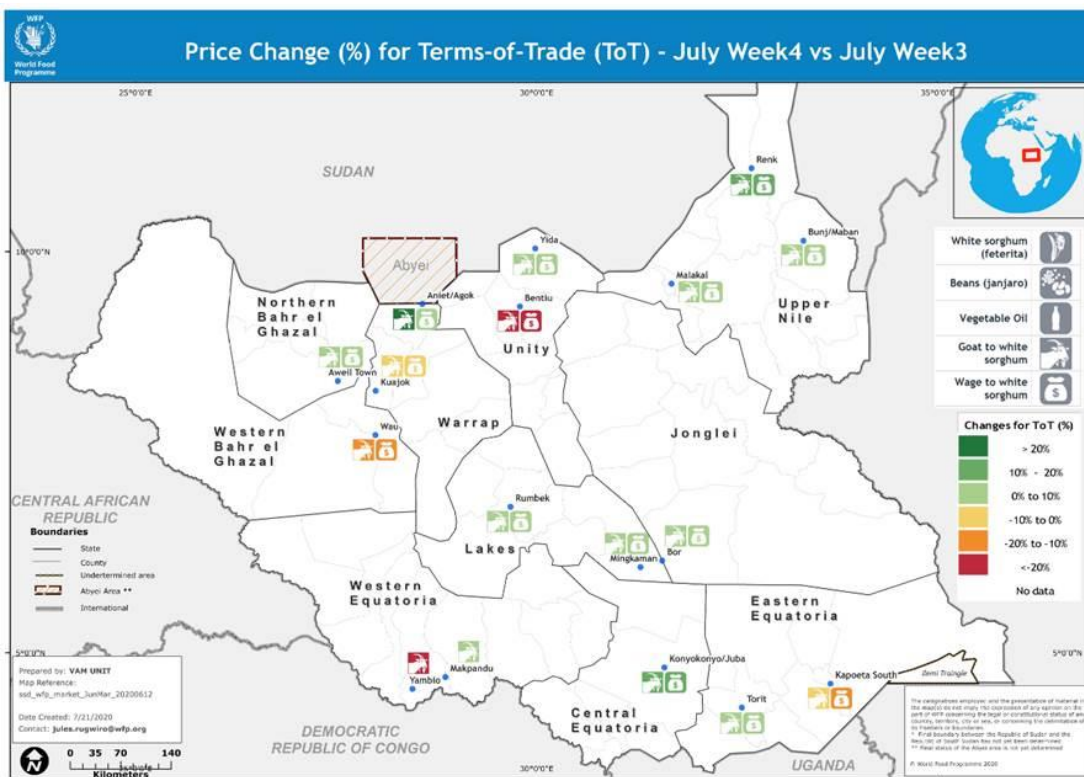


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Terms of Trade

As compared to the 3rd week of March, the average terms of trade between medium size goat and cereal dropped by 24%. Though the average ToT dropped, few markets such as Malakal, Rumbek, Mingkaman, Juba, Torit and Bor had improvement in their terms of trade due to increase in prices of livestock. However, increase in prices of goat in Renk, Kapoeta, Aniet, Makpandu and Yambio was not translated to improvement in TOT due to disproportionate increase in cereal prices. Similarly, the average wage to cereal terms of trade deteriorated by 52%, with more than 80% of monitored markets experiencing a deterioration.



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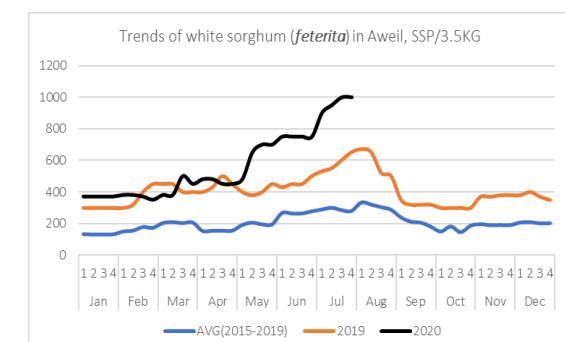
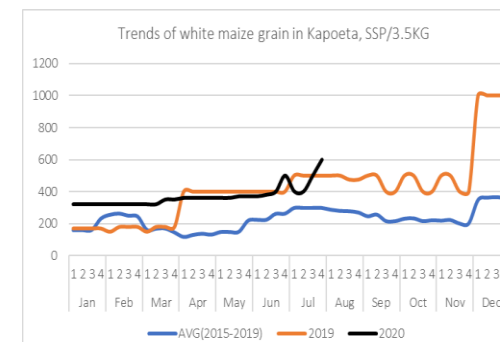
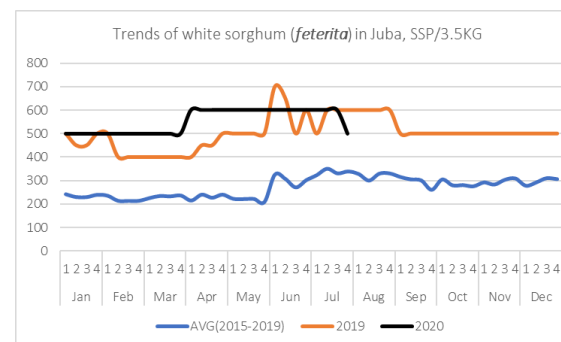
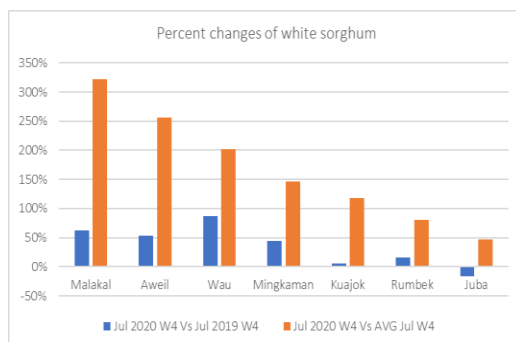
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Price trends - as compared to 2019 and to the five year (2015-2019) average

As compared to the 4th week of July 2019, the average prices of white sorghum (feterita) increased by 25%, local white sorghum by 45%, maize flour by 40%, wheat flour by 21% and maize grain by 7%. Similarly, prices of pulse also increased across markets: average price of red beans rose by 62% and fava beans by 27%.

A proportionally larger increase in the average prices of livestock as compared to the increase in cereal prices in the last one-year determined an increase in the goat to cereal terms of trade in some markets, namely Bor, Juba, Rumbek and Torit. On the contrary, markets that had deterioration of goat to cereal terms of trade were Aweil, Wau, Kapoeta, Kuajok, Malakal, Mingkaman, Yambio and Yida. Wage to cereal terms of trade deteriorated on average by 23%; however, few markets such as Aweil, Kapoeta, Juba and Rumbek had improvement in their terms of trade as compared to 4th week of July 2019. Generally, these deterioration in the terms of trade indicate how households are facing economic challenges to meet the minimum food requirements.

South Sudan is in a sustained economic crisis which affects the lives of many households through incurring high cost of living and disruptions of livelihoods. As SSP continued to depreciate, this negatively impacts the purchasing power of citizens who earn incomes in local currency but consume mostly imported food items. As a result of these and other interlinked factors, **the average prices of staple food were higher than 100% as compared to a five-year average**. For instance, the average retail prices of white sorghum (feterita), maize grain and red beans were higher than a five-year average by 126%, 107% and 190%, respectively. Other food items such as maize flour, wheat flour and vegetable oil were also higher than the long-term average within 68-102%. The average terms of trade between goat and cereal stood slightly higher than long-term average by 8%; however, markets of Aweil, Wau, Kuajok, Malakal, Mingkaman, Yambio and Yida had deterioration in terms of trade. Similarly, the average wage to cereal terms of trade deteriorated slightly, by 7% against long term average, but Aweil, Bor, Juba and Rumbek had improvement in their terms of trade.



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Juba market prices

Commodity	Units	Mar -W3	Jul - W3	July -W4	Percent changes	
					Post COVID19 July W4 Vs Mar W3	Week-to-week July W4 Vs July W3
Cereals						
Maize Flour	KG	250	300	270	8%	-10%
Sorghum Flour	KG	250	300	270	8%	-10%
White sorghum (feterita)	3.5KG	500	600	500	0%	-17%
White Sorghum (local)	3.5KG	500	600	500	0%	-17%
White maize (grain)	KG	600	600	550	-8%	-8%
Wheat flour	KG	250	300	270	8%	-10%
Rice	KG	400	500	500	25%	0%
Other commodities						
Cowpea	KG	1,100	1,100	1,100	0%	0%
Foul el masri (broad beans)	KG	1,000	1,500	1,500	50%	0%
Beans (janjaro)	KG	600	600	600	0%	0%
Meat (beef)	KG	1,500	2,000	2,000	33%	0%
Sugar	KG	220	300	300	36%	0%
Vegetable Oil	KG	400	425	440	10%	4%
Salt	KG	120	200	200	67%	0%
ToT						
Goat to white sorghum	# malua	50.0	50.0	60.0	20%	20%
Wage to white sorghum	# malua	3.0	2.5	3.0	0%	20%
Goat	Head	25,000	30,000	30,000	20%	0%
Wage	Head	1,500	1,500	1,500	0%	0%

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Table a: week-to-week comparison – fourth week of July vs. third week of July

WEEKLY Percent changes - July W4 vs July W3																			
Cereals	Juba	Torit	Kapoeta South	Yambio	Makpandu	Malakal	Maban	Renk	Melut	Bor	Bentiu-Kalibaala	Bentiu-Rubkona	Yida	Aweil	Kuajok	Aniet	Rumbek	Mingkaman	Wau
Maize Flour	-10%	-4%	3%	0%	0%	0%	0%			0%	0%	0%	0%	0%	8%		0%	33%	6%
Sorghum Flour	-10%	33%		0%				13%						3%	8%		0%		6%
White sorghum (feterita)	-17%			0%		0%				0%	0%		0%	0%	6%	-6%	0%	0%	22%
White Sorghum (local)	-17%			0%									0%	0%	6%		0%	0%	10%
Brown Sorghum (local)		0%		0%			0%	0%		0%			0%	0%	0%	-6%	0%	0%	33%
White maize (grain)	-8%	0%	20%	0%	0%									0%			0%		
Wheat flour	-10%	22%	17%			0%	0%	0%		0%	0%	0%	0%	0%	11%	0%	0%	33%	3%
Rice	0%	0%	20%	0%	0%	0%	0%	7%		0%	0%	0%	0%	0%	9%	0%	0%		5%
Other Food																			
Cowpea	0%	0%	37%	31%	4%		0%	0%		0%	0%	0%	0%	0%		-7%		5%	
Foul el masri (broad beans)	0%	0%				0%	0%	0%			0%	0%	20%	0%	6%	7%			4%
Beans (janjaro)	0%	0%	0%	0%	0%	0%	0%	20%		0%	0%	0%	0%	0%	6%	0%	0%	0%	4%
Meat (beef)	0%	20%	0%	0%	0%	-17%	0%	16%		0%	0%	0%	0%	0%	6%	0%	0%	0%	0%
Sugar	0%	20%	0%	7%	0%	0%	0%	0%		0%	32%	0%	0%	0%	14%	0%	0%	0%	11%
Vegetable Oil	4%	19%	25%	0%	0%	0%	0%	-5%		0%	0%	0%	0%	0%	6%	0%	0%	0%	15%
Salt	0%	25%	0%	7%	10%		0%	25%		0%	0%	0%	0%	0%	7%	0%	0%	0%	0%
Terms of Trade																			
Goat to white sorghum	20%	5%	-10%	-29%	7%	0%	0%	15%		0%	0%	-30%	0%	0%	-6%	23%	0%	7%	-18%
Wage to white sorghum	20%	0%	-17%			0%	0%	20%		0%	0%	-30%	0%	0%	-6%	6%	0%	0%	-18%
Goat	0%	5%	8%	-29%	7%	0%	0%	15%		0%	0%	0%	0%	0%	0%	15%	0%	7%	0%
Wage	0%	0%	0%			0%	0%	20%		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Table b: post-COVID-19 measures – fourth week of July vs. third week of July

POST COVID Percent changes - July W4 vs March W3																			
Cereals	Juba	Torit	Kapoeta South	Yambio	Makpandu	Malakal	Maban	Renk	Melut	Bor	Bentiu-Kalibaala	Bentiu-Rubkona	Yida	Aweil	Kuajok	Aniet	Rumbek	Mingkaman	Wau
Maize Flour	8%	20%	80%	110%		50%	0%			40%	7%	50%	0%	20%	23%		200%	33%	26%
Sorghum Flour	8%	33%		10%				70%						16%	72%		50%		17%
White sorghum (feterita)	0%			-2%		30%				0%	100%		140%	163%	89%	45%	50%	44%	138%
White Sorghum (local)	0%		100%	0%			0%						180%	170%	80%		40%	30%	83%
Brown Sorghum (local)				0%				75%		0%			100%	170%	70%	55%	25%		71%
White maize (grain)	-8%	10%	71%	82%	82%								100%				25%		
Wheat flour	8%	40%	17%			20%	0%	19%		-40%	-7%	29%	33%	53%	43%	50%	9%	50%	6%
Rice	25%	17%	0%	28%	18%	0%	0%	23%		40%	25%	63%	20%	20%	50%	10%	13%	50%	13%
Other Food																			
Cowpea	0%		113%										146%	8%					28%
Foul el masri (broad beans)	50%					75%	0%	43%			0%		50%	8%	89%	0%			0%
Beans (janjaro)	0%	13%	40%	15%	19%	25%	0%	20%		43%	0%	30%	25%	5%	89%	14%	60%	40%	13%
Meat (Beef)	33%		67%	0%	-14%	0%	0%	24%		17%		0%	0%	20%	6%	0%	-17%	20%	20%
Sugar	36%	36%	14%	7%	13%	20%	0%	25%		17%	46%	167%	0%	20%	14%	0%	33%	67%	33%
Vegetable Oil	10%	0%	0%	-17%	-30%	20%	20%	6%		0%	-13%	0%	0%	-7%	42%	50%	0%	17%	25%
Salt	67%	43%	-17%	50%	38%	25%	0%	67%		0%	0%		0%	13%	60%	150%		167%	10%
Terms of Trade																			
Goat to white sorghum	20%	31%	-24%	-27%	-41%	28%	0%	-2%		33%	-58%	-58%	-58%	-71%	-53%	-14%	54%	9%	-55%
Wage to white sorghum	0%	-9%	-3%			-8%	0%	-23%		0%	-50%	-50%	-58%	-62%	-47%	-31%	-11%	-23%	-58%
Goat	20%	44%	30%	33%	7%	67%	0%	52%		33%	-17%	-16%	0%	-23%	-11%	25%	131%	58%	7%
Wage	0%	0%	67%			20%	0%	20%		0%	0%	0%	0%	0%	0%	0%	33%	11%	0%