



GIEWS Country Brief The Republic of South Sudan

Reference Date: 23-March-2023

FOOD SECURITY SNAPSHOT

- **Dire food security situation, with almost two-thirds of total population (7.76 million) estimated to face severe acute food insecurity between April and July**
- **Cereal production in 2022 estimated at about 936 000 tonnes, 12 and 16 percent up from 2021 and five-year average**
- **Below-average precipitation amounts forecast between March and May over southern bimodal rainfall areas**
- **Exceptionally high food prices constraining access to food for large number of households**

Dire food security situation due to multiple shocks

Since early 2023, the seasonal deterioration of the food security situation has been compounded by protracted macroeconomic challenges resulting in high inflation, insufficient food supplies and livelihood losses due to consecutive years of widespread floods.

According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 7.76 million people (almost two-thirds of the total population) are estimated to face IPC Phase 3 (Crisis) or worse levels of acute food insecurity during the lean season between April and July. The highest prevalence of severe acute food insecurity is reported in the states of Upper Nile, Northern Bahr el Ghazal, Jonglei, including Pibor Administrative area, and Unity, where between 70 and 77 percent of the population is estimated to be severely food insecure, including about 43 000 people facing IPC Phase 5 (Catastrophe) levels of acute food insecurity in Jonglei and Unity states.

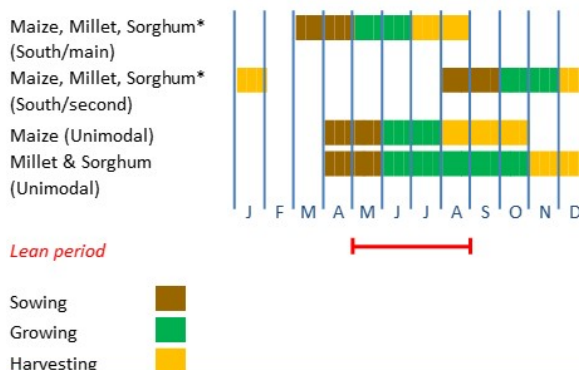
After the ceasefire signed in 2018, the security situation has generally improved and, until December 2022, about 627 000 displaced people returned to their places of origin, including about 151 000 in 2022. However, the situation remains volatile, and organized violence at subnational level in Greater Upper Nile Region since August 2022 resulted in the displacement of about 20 000 people.

Currently, about 2.2 million people remain internally displaced, and 2.27 million refugees are residing in neighbouring Uganda,

South Sudan

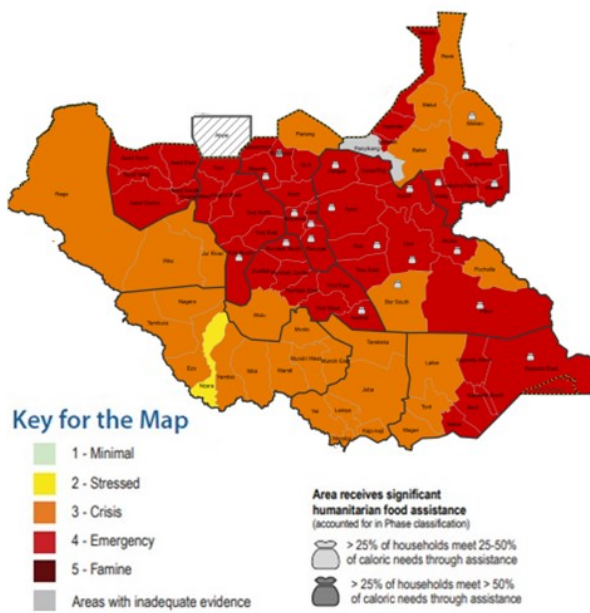
Crop Calendar

(*major foodcrop)



South Sudan - Integrated Food Security Phase Classification (IPC)

Projection April– July 2023



the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya.

Increased cereal production in 2022

According to preliminary findings of the 2022 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the aggregate cereal production in 2022 is estimated at about 936 000 tonnes, about 12 percent up from the 2021 output and about 16 percent above the average of the previous five years.

Cereal production benefited from average to above-average amounts and an even distribution of precipitation during the second half of the season, from July 2022 onwards, which boosted yields, and by an 8 percent increase in planted area compared to the previous year due to improved security conditions. However, floods in low-lying areas and episodes of intercommunal violence caused localized production shortfalls.

Compared to 2021, production increased by 10-25 percent in Western Bahr el Ghazal, Central Equatoria, Western Equatoria, Warrap, Upper Nile, Jonglei and Lakes states, while it decreased by 17 percent in Unity State and by 5 percent in Northern Bahr el Ghazal State, mainly due to floods.

The overall cereal deficit in the January/December 2023 marketing year is estimated at 485 400 tonnes, about 10 percent lower than the deficit estimated for 2022 and similar to the 2018-2022 average. Despite the year-on-year decline, the cereal deficit is still substantial, with the net production in 2022 representing only about two-thirds of the estimated cereal requirements in 2023.

Below-average rains forecast between March and May over southern bimodal rainfall areas

In central and northern unimodal rainfall areas, the rainy season normally starts in May, while in southern bimodal rainfall areas of Greater Equatoria Region the onset of seasonal rains occurs in April.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, rains between March and May are expected to be below average across most of southern bimodal rainfall areas, likely affecting germination and establishment of first season crops, to be harvested from July.

Food prices at exceptionally high levels

In the capital, Juba, between June and September 2022, prices of maize surged by 65 percent, while prices of sorghum doubled, as the exchange rate substantially depreciated and prices of fuel more than doubled over the same period, inflating transport costs. The sharp increase in fuel prices reflected the ripple effects of the war in Ukraine on international oil prices. Prices of coarse grains increased by 15-20 percent between October 2022 and February 2023, the rising trend easing due to the commercialization of newly harvested 2022 crops. In February 2023, prices of maize and sorghum were about twice the high values of one year earlier.

Prices of sorghum in February 2023 were at exceptionally high levels also in other markets across the country. In Rumbek (Lakes State), Gogrial (Warrap State), Bor (Jonglei State) and Aweil (Northern Bahr el Ghazal State), prices were between two

South Sudan

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Sorghum	701	726	808	11.2
Maize	102	108	121	11.8
Millet	5	5	6	20.0
Others	1	1	1	11.1
Total	809	839	936	11.5

Note: Percentage change calculated from unrounded data.

South Sudan

Retail prices in Juba

South Sudanese pound per kg



and three times their year-earlier values.

The high levels of cereal prices are mainly due to insufficient supplies, low foreign currency reserves, a weak national currency and high fuel prices. Further upward pressure was exerted by reduced imports from neighbouring Uganda, where exportable surpluses shrunk in 2022 following a reduced cereal production.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief South Sudan

Reference Date: 22-July-2022

FOOD SECURITY SNAPSHOT

- **Dire food security situation, with almost two-thirds of total population (7.74 million) estimated severely food insecure between April and July**
- **Cereal production in 2021 estimated at about 840 000 tonnes, 4 percent down from 2020 output and well below pre-conflict levels**
- **Below-average precipitation amounts during first half of 2022 cropping season**
- **Exceptionally high food prices constraining access to food for large segments of population**

Dire food security situation due to multiple shocks

Since early 2022, the seasonal deterioration of the food security situation has been compounded by protracted macroeconomic challenges resulting in high inflation, insufficient food supplies and livelihood losses due to consecutive years of widespread floods and intercommunal violence.

According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 7.74 million people (almost two-thirds of the total population) are estimated to face IPC Phase 3 (Crisis) or worse levels of acute food insecurity during the lean season between April and July. The highest prevalence of food insecurity is reported in Lakes, Unity and Jonglei states and in Pibor Administrative area, where 60 to 80 percent of the population is estimated to be severely food insecure, with about 87 000 people facing IPC Phase 5 (Catastrophe) levels of food insecurity.

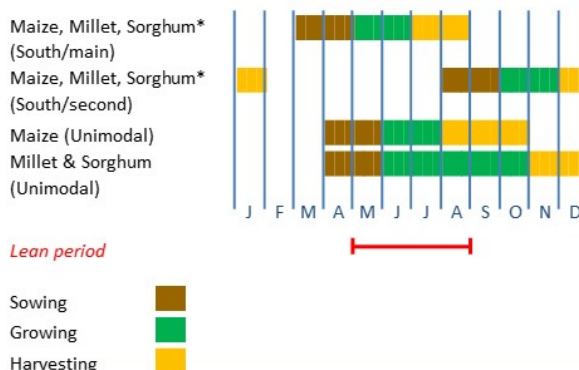
After the cease-fire signed in 2018, the security situation has generally improved and about 574 000 displaced people returned to their places of origin, including more than 74 000 between January and May. However, the situation remains volatile and, since 2020, organized violence at subnational level increased, resulting in new displacements, with armed clashes forcing almost 23 000 people to leave the country between January and May.

Currently, about 2 million people remain internally displaced and 2.36 million refugees are residing in neighbouring Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya.

South Sudan

Crop Calendar

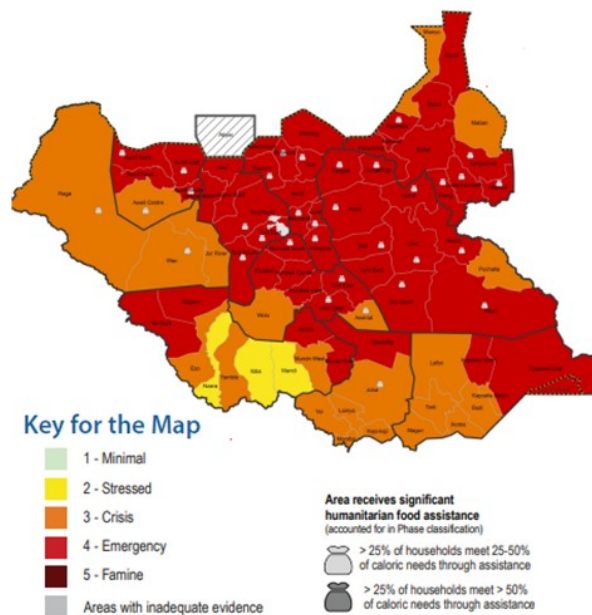
(*major foodcrop)



Source: FAO/GIEWS.

South Sudan - Integrated Food Security Phase Classification (IPC)

Projection April-July 2022



Reduced cereal production in 2021 due to weather extremes

According to the findings of the 2021 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the aggregate cereal production is estimated at about 840 000 tonnes, 4 percent down from the 2020 output, and well below the pre-conflict levels. The year-on-year decrease in cereal production was mainly driven by reduced yields due to widespread floods and prolonged dry spells. The overall cereal deficit in the 2022 marketing year (January/December) is estimated at about 541 000 tonnes, about 16 percent above the near-average deficit estimated in 2021.

Below-average precipitation during first half of 2022 cropping season

In southern bimodal rainfall areas of Greater Equatoria Region, harvesting of first season crops is currently underway and will be completed in August. Although cumulative rains between March and June were 20 to 25 percent below average, they were generally sufficient to satisfy the water requirements of maize and sorghum. However, reported outbreaks of Fall Armyworm and African Armyworm are expected to result in localized crop losses.

In central and northern unimodal rainfall areas, where 2022 crops will be harvested from September, after a timely onset in April, the rainy season has been characterized by below-average amounts and an erratic temporal distribution of rains, except in Upper Nile State and in most of Jonglei State in the east. As a result, vegetation condition is average to below average in most central and western areas, with poor conditions recorded in Warrap State, southern parts of Unity State and westernmost areas of Jonglei State.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the June-September seasonal rains are expected to be above average across most of the country, with a likely positive impact on water-stressed crops. However, the abundant precipitation may contribute to raise the levels of the White Nile, Sobat and Baro rivers, already higher than average, with a high risk of widespread flooding.

Intercommunal violence along the border between Central Equatoria and Eastern Equatoria states as well as in Unity and Warrap states is disrupting agricultural operations and will likely result in localized crop losses.

Food prices at exceptionally high levels

In the capital, Juba, prices of maize and sorghum moderately increased by 7 to 8 percent between January and June, as upward seasonal trends were partly offset by the downward pressure of an 18 percent appreciation of the national currency on the parallel market. In central and northern areas, where significant cereal production shortfalls were recorded in 2021 due to floods, food price increases have been sharper due to a rapid depletion of the meagre stocks. Between January and June, prices of sorghum increased by almost 70 percent in Bor market in Jonglei State and more than doubled in Gogrial market in Warrap State.

Overall, prices of maize and sorghum in June were at exceptionally high levels across the country. In Juba, they were 12 percent above their high year-earlier values and almost twice

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Cereal Production

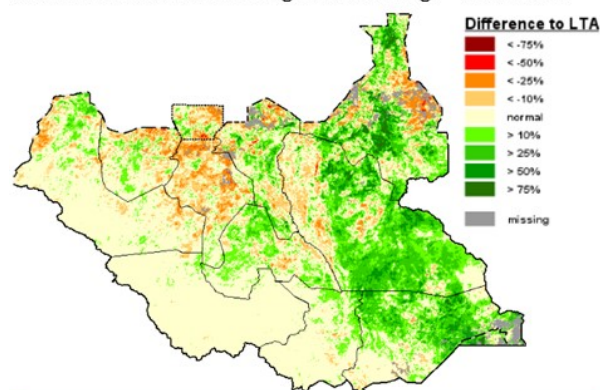
	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Sorghum	699	755	726	-3.8
Maize	101	113	109	-3.4
Millet	6	6	5	-16.7
Total	806	874	840	-3.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

South Sudan - NDVI anomaly

Relative difference to Long Term Average - June 2022

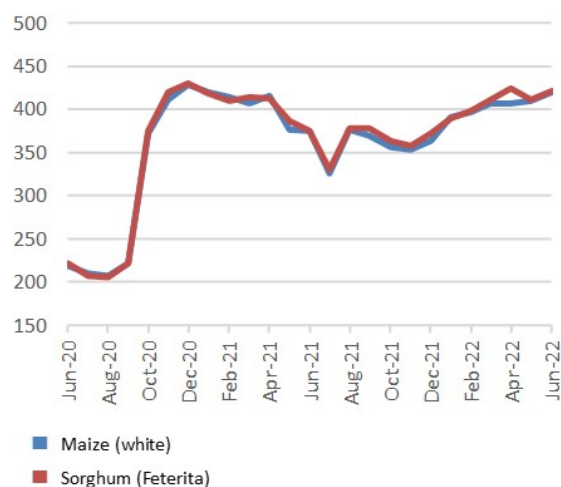


Source: FAO/GIEWS Earth Observation System.

South Sudan

Retail prices in Juba

South Sudanese pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

their levels of two years earlier and in Gogrial they were almost 90 percent higher than 12 months earlier.

Underlying the high prices are insufficient supplies and the continuously difficult macroeconomic situation due to low foreign currency reserves, the weak national currency and high fuel prices inflating transport costs. As the country heavily relies on imports of food and fuel, there is concern that high international prices linked to the war in Ukraine may contribute to worsen households' access to food and to increase production costs.

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GIEWS Country Brief South Sudan

Reference Date: 01-March-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2020 estimated at 874 400 tonnes, 7 percent above 2019 average output, but still well below pre-conflict levels
- Exceptionally high food prices constraining access to food for large segments of population
- Dire food security situation, with almost half of total population (about 5.8 million people) estimated severely food insecure between December 2020 and March 2021

Increased cereal production in 2020 despite substantial flood-induced losses

Harvesting of the 2020 main season crops was completed last January. According to the preliminary findings of the 2020/21 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the aggregate cereal production is estimated at 874 400 tonnes, 7 percent above the 2019 average output, but still well below the pre-conflict levels. The overall cereal deficit in the January/December 2021 marketing year is estimated at 465 600 tonnes, 3.5 percent below the deficit estimated for 2020, but still 5 percent above the 2016-2020 average.

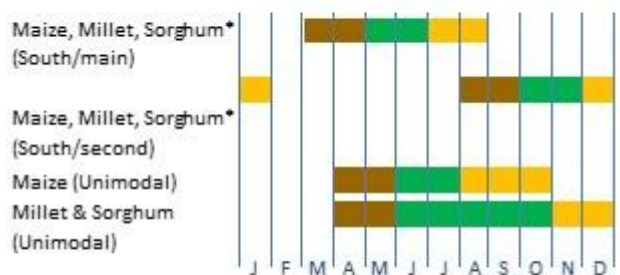
The planted area increased slightly in 2020 compared to 2019 mainly due to security improvements that prompted some displaced households to return to their places of origin and engage in agricultural activities. The increased availability of family labour due to the closure of schools following the COVID-19-related restrictions also contributed to the expansion of plantings. Abundant precipitation amounts boosted yields, but torrential rains and river overflows triggered unusually widespread flooding, especially in Jonglei, Lakes and Upper Nile states, which resulted in significant crop losses. While cereal production increased by 10-30 percent from 2019 in Central Equatoria, Western Equatoria, Unity and Western Bahr El Ghazal states, it declined by 13 percent in Jonglei State due to floods.

Food prices at exceptionally high levels

In the capital, Juba, prices of maize and sorghum, already at high levels, surged by almost 70 percent in the month of October 2020 due to an abrupt depreciation of the local currency on the parallel market. Subsequently, prices increased at slower rates in November and December, and firmed up in January 2021 as the second season harvest in southern bi-modal rainfall areas

South Sudan

Crop Calendar (*major foodcrop)



Lean period

Sowing
Growing
Harvesting

Source:

South Sudan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Sorghum	702	710	737	3.8
Maize	106	103	131	27.2
Millet	6	5	6	14.3
Others	1		0	
Total	815	818	874	6.9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

increased market availabilities. January prices were at exceptionally high levels, more than three times the already high year-earlier values. Factors contributing to the extremely high prices are: the difficult macro-economic situation, inadequate domestic supplies, the lingering impact of the prolonged conflict, high transport costs due to high fuel prices and informal taxation. In the first half of 2020, additional upward pressure on food prices was exerted by the introduction of the COVID-19 screening measures at border points in Uganda, the country's main source of imports, which hampered trade flows.

Dire food security situation due to multiple shocks

Since early 2021, the seasonal deterioration of the food security situation has been compounded by the severe livelihood losses in central and eastern areas affected by floods in mid- and late 2020, the lingering impact of the prolonged conflict, the COVID-19 pandemic and the ongoing economic crisis. According to the latest Integrated Food Security Phase Classification (IPC) analysis, almost half of the total population (about 5.8 million people) is estimated to face IPC Phase 3: "Crisis" or worse levels of acute food insecurity during the December 2020-March 2021 period. The highest prevalence of food insecurity is reported in Jonglei State and in neighbouring Pibor Administrative Area, the areas worst affected by the floods, where about 80 percent of the population is severely food insecure and 11 000 people are facing IPC Phase 5: "Catastrophe" levels of acute food insecurity.

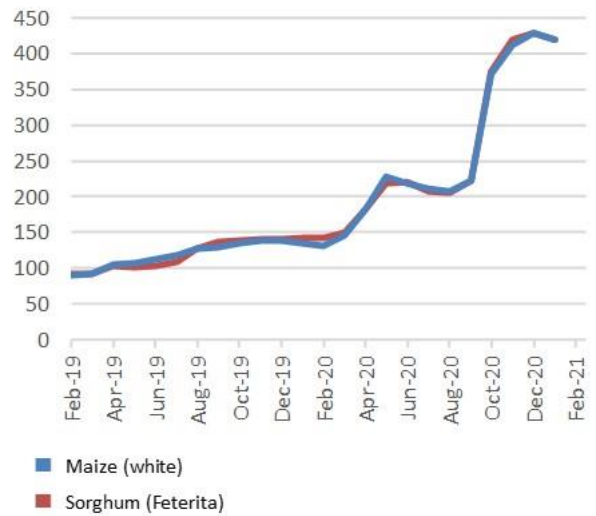
After the cease-fire signed in 2018, the security situation has generally improved. However, it remains volatile and, in 2020, inter-communal violence increased, especially in Jonglei State. Between January and September 2020, about 261 000 displaced people returned to their places of origin, including 254 000 from within the country and 7 000 from abroad. Currently, about 1.62 million people remain internally displaced and 2.19 million South Sudanese refugees are still residing in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).

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South Sudan

Retail prices in Juba

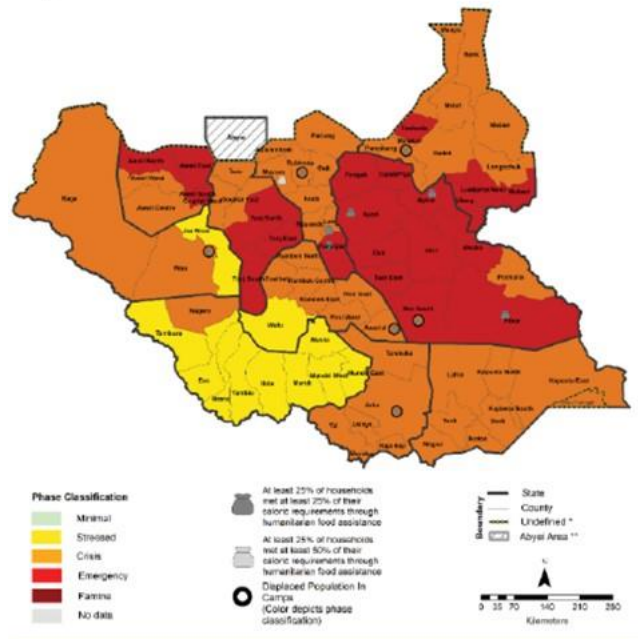
South Sudanese Pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

South Sudan - Integrated Food Security Phase Classification (IPC)

Projection December 2020 - March 2021





GIEWS Country Brief South Sudan

Reference Date: 23-April-2020

FOOD SECURITY SNAPSHOT

- Dire food security situation, with half of total population (about 6 million people) estimated to be severely food insecure between February and April 2020
- Above-average early season precipitation in southern producing areas benefited planting and germination of 2020 first season crops
- Cereal production in 2019 estimated at 818 500 tonnes, 10 percent up from 2018 but still 4 percent below average of previous five years
- Food prices surged in March and April due to trade disruptions with Uganda, caused by border screening to contain COVID-19 outbreak

Widespread floods worsened food insecurity in Northern and Eastern areas

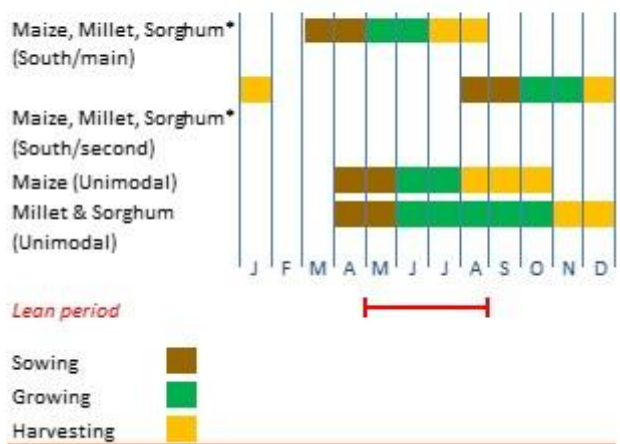
Since early 2020, the seasonal deterioration of the food security situation has been compounded by severe livelihood losses in northern and eastern areas affected by floods in late 2019, the lingering impact of the prolonged conflict and the ongoing economic crisis. According to the latest Integrated Food Security Phase Classification (IPC) analysis, half of the total population (about 6 million people) is estimated to face Phase 3: "Crisis" and above or worse levels of acute food insecurity during the February-April 2020 period. The highest prevalence of food insecurity is reported in Jonglei State, the area worst affected by the floods, where about 70 percent of the population is severely food insecure.

After the signature of the Revitalized Agreement on the Resolution of the Conflict in South Sudan (R-ARCSS) in September 2018, the security situation has improved, with a significant decline of security incidents. In 2019, about 418 000 displaced people returned to their places of origin, including 277 000 from within the country and 141 000 from abroad. Currently, about 1.67 million people remain internally displaced and 2.24 million South Sudanese refugees are still residing in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).

In March and April, the Government introduced a range of restrictive measures to contain the COVID-19 outbreak and, with the support of the international community, launched a

South Sudan

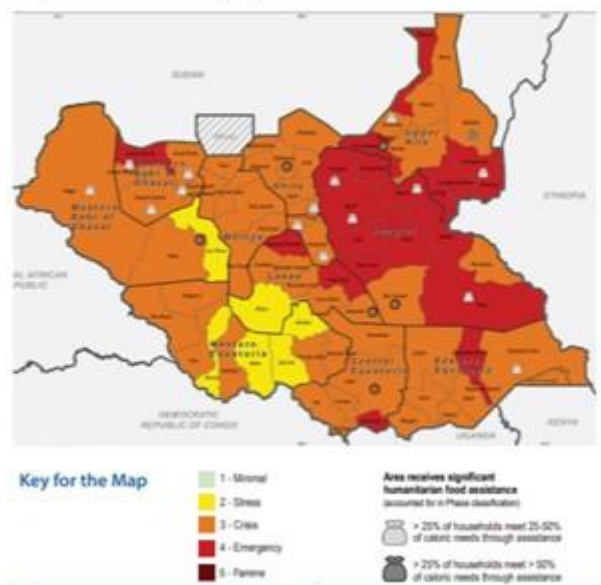
Crop Calendar (*major foodcrop)



Source:

South Sudan - Integrated Food Security Phase Classification (IPC)

Projection February-April 2020



preparedness and response plan (see Box below) to mitigate its impact on health and food security. However, these measures had also negative effects on livelihoods and agriculture, affecting households' income in the informal sector in urban areas, impairing movements of agricultural workers and slowing down trade flows.

Favourable start of season in southern producing areas due to above-average early seasonal rains

In the southern bi-modal rainfall areas of Greater Equatoria Region, seasonal rains had a timely onset at the beginning of March and were characterized by well above cumulative rainfall amounts that encouraged plantings and benefitted crop germination. The gradual but steady return of displaced farmers to their places of origin, following the general improvement in the security situation, is expected to lead to an increase in planted area, similar to 2018 and 2019.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, rainfall amounts are expected to be above average across the country until May, benefiting yields of first season crops in bi-modal rainfall areas of Greater Equatoria Region and crop germination and establishment in central and northern uni-modal rainfall areas.

Beginning from February 2020, some desert locust swarms entered the southeastern part of the country from Uganda, and have maintained their presence in the area since then. If control measures in neighbouring countries will not curb the spread of more swarms into South Sudan, damage to crops at vegetative stage and to pastures in Greater Equatoria Region are likely to occur in April and May.

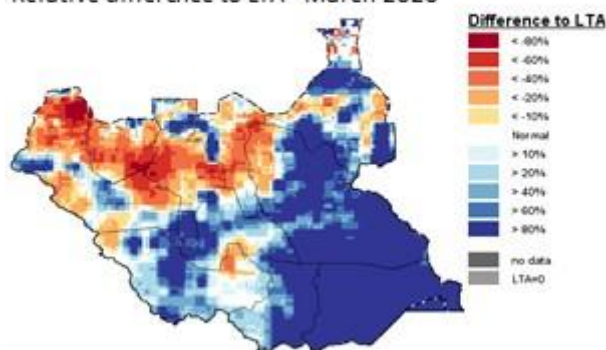
Increased cereal production in 2019 despite severe flood-induced losses

Harvesting of the 2019 main season crops was completed in January 2020. According to the findings of the 2019 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the aggregate cereal production is estimated at 818 500 tonnes. This output is 10 percent up from the record low production obtained in 2018 and 4 percent below the average of the previous five years. As a result, the overall cereal deficit in the January/December 2020 marketing year is estimated at 482 500 tonnes, 7 percent below the deficit estimated for 2019, but still 22 percent above the 2015-2019 average.

The harvested area is estimated at about 930 000 hectares, over 5 percent up from 2018 but still well below pre-conflict levels. The increase is mainly due to security improvements that prompted some displaced households to return to their places of origin and engage in agricultural activities. Abundant seasonal precipitation boosted yields, but torrential rains triggered unusually widespread flooding in Greater Upper Nile and Greater Bahr el Ghazal regions, which resulted in significant crop losses. Notably, while cereal production increased by 30-40 percent from 2018 in Greater Equatoria Region, it declined in the flood-affected Northern Bahr el Ghazal and Upper Nile states by 20-25 percent. In Upper Nile State, yields were further constrained by the losses caused by desert locusts, which entered the State from the Sudan and attacked crops in November and December.

South Sudan - Precipitation anomaly

Relative difference to LTA - March 2020



Source: FAO/GIEWS Earth Observation System.

South Sudan

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Sorghum	732	650	710	9.2
Maize	116	90	103	14.4
Millet	6	5	5	0.0
Total	854	745	818	9.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

South Sudan

Retail prices in Juba

South Sudanese Pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Food prices at exceptionally high levels, also due to recent disruptions to trade with Uganda

In the capital, Juba, prices of maize and sorghum have remained firm between October 2019 and February 2020 as the South Sudanese pound held steady. Prices of wheat have increased between October 2019 and February 2020 by about 10 percent. Subsequently, cereal prices increased in March and April, as the Government of Uganda, the country's main source for cereals, began implementing screenings at the borders in the framework of measures to contain the spread of COVID-19, which impaired commodity trade flows. Prices of sorghum and maize increased by 20-25 percent between February and April, while prices of wheat, totally imported, surged by more than 40 percent over the same period. In April 2020, cereal prices were at exceptionally high levels, 55-70 percent higher on a yearly basis and more than 20 times higher than in July 2015, when they started surging as the country's currency began to rapidly depreciate. The high price level is mainly driven by inadequate domestic supplies, high transport costs due to high fuel prices and informal taxation, the difficult macro-economic situation and the lingering impact of prolonged conflict. Price spikes due to the disruption of trade flows from Uganda have also been recorded in other markets. For example, in Yei (Central Equatoria State) and Magwi (Eastern Equatoria State) markets, located near the border, prices of maize increased between February and April by 25 and 85 percent, respectively.

COVID-19 and measures adopted by the Government

In March and early April 2020, the Government has introduced a number of precautionary measures in response to the COVID-19 pandemic, including the establishment of a nationwide curfew, the closure of all education institutions, the suspension of gatherings including sports, religious and political events, weddings and funerals, the closure of all non-essential businesses, the suspension of all flights, except for cargo planes, relief and emergency flights, the closure of all land border crossing points except for trucks transporting food and fuel and the suspension of all passenger travels to and from Juba and from state to state.

The Ministry of Health, in collaboration with the WHO and other partners, launched a nation-wide preparedness and response plan for COVID-19, aimed to curb the spread of the outbreak through surveillance, rapid response teams, case investigation and management, laboratory testing, risk communication, community engagement, social mobilization, and infection prevention and control.

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GIEWS Country Brief South Sudan

Reference Date: 01-August-2019

FOOD SECURITY SNAPSHOT

- Dire food security situation, with about 7 million people (60 percent of total population) estimated to be severely food insecure
- Delayed first season harvests in southern key producing areas due to a late onset of seasonal rains affecting planting operations
- Average to above-average rainfall at start of the cropping season in uni-modal central and northern areas benefiting crop planting and establishment
- Some central and northern lowland cropping areas affected by flooding and waterlogging
- High food prices constraining access to food for large segments of population

Dire food security situation, with 60 percent of total population severely food insecure

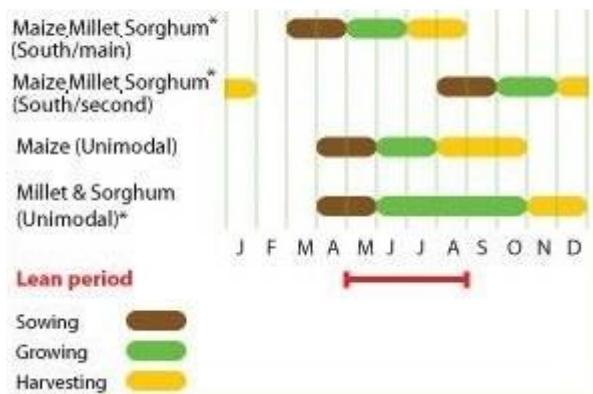
According to the latest Integrated Food Security Phase Classification (IPC) analysis, 6.96 million people (about 60 percent of the total population) are estimated to be severely food insecure between May and July 2019, the highest food insecurity caseload on record. The current situation is mainly driven by a harsh and prolonged lean season, which started early as stocks from the record low 2018 harvest were quickly depleted and it is expected to last longer due to a late onset of the 2019 seasonal rains that will likely delay the first season harvest. The lingering impact of the prolonged conflict, which caused severe damages to productive assets and resulted in a major economic crisis, is critically affecting income-earning opportunities, severely constraining food availability and access for large segments of the population.

The areas of major concern are former Lakes, Northern Bahr el Ghazal, Jonglei, Upper Nile and Unity states, where 65-75 percent of the population is estimated to be in IPC Phases 3: "Crisis", 4: "Emergency" and 5: "Catastrophe" levels of acute food insecurity.

The implementation of the September 2018 peace deal resulted in a lower intensity of the conflict in the Greater Bahr el Ghazal and Greater Upper Nile regions and enabled some returns of displaced populations. An estimated 500 000 displaced people have recently returned to their places of origin, out of which about 40 percent were refugees hosted in neighbouring countries. The return rate increased from about 18 000 people per month in

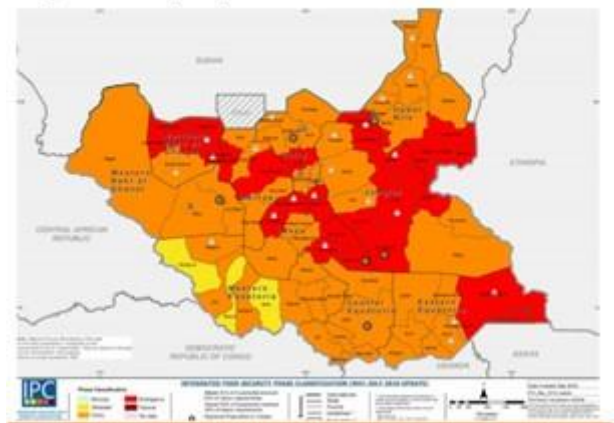
South Sudan

Crop Calendar (*major foodcrop)



South Sudan - Integrated Food Security Phase Classification (IPC)

Projection May-July 2019



2018 until September 2018 to about 76 000 per month thereafter. However, about 1.9 million people remain internally displaced and 2.3 million South Sudanese refugees are still residing in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).

Delayed first season harvests in southern key producing areas

The recent improvements of the security situation resulted in better access to fields and in some voluntary returns of displaced farmers, thus leading to increased plantings. However, planted area remained below the pre-conflict levels due to the lingering impact of the prolonged conflict, including damage and destruction of productive assets and large numbers of farming households still displaced and unable to farm. In addition, soaring prices of inputs continue to severely affect agricultural activities.

In southern bi-modal rainfall areas of the Greater Equatoria Region, which comprise traditionally cereal surplus producing areas in former Central and Western Equatoria states, harvesting of first season crops will be completed in August with about a one-month delay. Planting operations, usually beginning in March, started in April due to a late onset of seasonal rains. Subsequently, average precipitations in May and above-average rains in June and July benefited crop establishment and development and had a favourable impact on vegetation conditions (see Vegetation Condition Index map) and yields. As a result, the output of the first season harvest is expected to be around or above the average of the previous five years, but still below the pre-conflict levels.

In central and northern uni-modal rainfall areas, 2019 crops, for harvest from September, were planted in May following a timely onset of seasonal rains. So far, cumulative precipitations have been average to above average, leading to favourable vegetation conditions over most areas (see Vegetation Condition Index map). However, in several lowland cropping areas of former Northern Bahr el Ghazal, Warrap and Abyei states, the abundant rains in June and July have resulted in flooding and waterlogging. The region most affected by the floods is the former Northern Bahr el Ghazal State. In particular, in the Aweil rice scheme sowing has been impeded by the full inundation of fields.

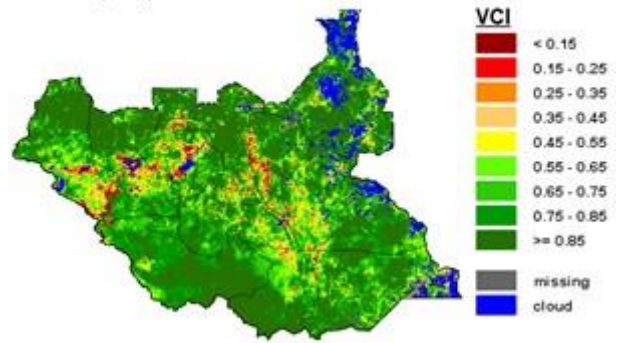
According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-to-September rains are expected to be average in northern and western areas, while weather conditions are likely to be drier than usual in southern and eastern areas, with a negative impact on planting and establishment of second season crops. A close monitoring of rainfall performance and vegetation conditions is warranted.

Food prices at exceptionally high levels

In the capital, Juba, prices of sorghum, maize and imported wheat increased by 30-60 percent between December 2018 and July 2019 as the South Sudanese Pound depreciated and seasonal patterns were exacerbated by the early depletion of stocks from the record low 2018 harvest. In July, prices of cereals and other important staples, including groundnuts and cassava, were generally down or around their year-earlier levels, but still exceptionally high, more than ten times higher than in July 2015, when they started surging as the country's currency began to rapidly depreciate. The high price levels are the result of tight

South Sudan - Vegetation Condition Index (VCI)

Dekad 2, July 2019



Source: FAO/GIEWS Earth Observation System.

South Sudan

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Sorghum	759	667	650	-2.5
Maize	118	92	90	-1.8
Millet	6	5	5	0
Total	883	764	745	-2.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

South Sudan

Retail prices in Juba

South Sudanese Pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

supplies, a still volatile security situation hindering market functioning and trade flows, high transport costs and a weak local currency.

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GIEWS Country Brief South Sudan

Reference Date: 15-March-2019

FOOD SECURITY SNAPSHOT

- Overall food security situation continues to deteriorate, with 6.45 million individuals estimated to be food insecure between February and April 2019
- Erratic rains at start of 2019 cropping season affected germination of early planted crops
- Cereal production in 2018 estimated at record low levels due to widespread insecurity and poor seasonal rains
- High food prices constraining access to food for large segments of population

Already dire food security situation continues to deteriorate

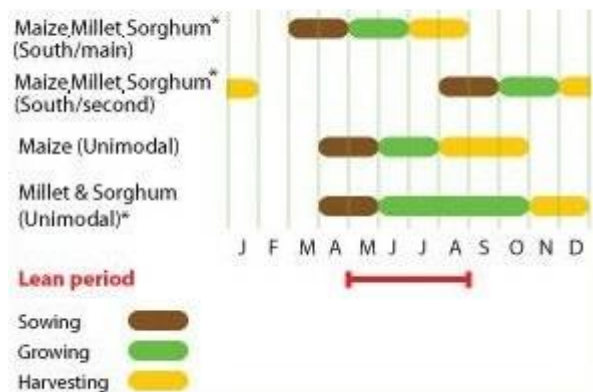
Food availability and access continue to be severely constrained by the widespread and protracted conflict, large-scale displacements, high food prices, market disruptions, macro-economic collapse and exhaustion of households' coping mechanisms. An earlier-than-normal start of the lean season, due to the reduced 2018 crop production, resulted in an increase of the severely food insecure caseload (IPC Phases 3, 4 and 5), from 4.4 million people at the end of 2018 to 6.45 million (about 57 percent of the total population) in the February-April 2019 period.

The areas of major concern include former Jonglei, Lakes and Unity states, where up to 70 percent of the population is severely food insecure and 45 000 individuals face IPC Phase 5: "Catastrophe". At the peak of the lean season, from May to July 2018, a further deterioration in the food security situation is anticipated and severe food insecurity is expected to affect 6.87 million people.

Since the start of the conflict in mid-December 2013, about 1.87 million individuals were internally displaced and 2.28 million sought refuge in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya) due to widespread insecurity and violence. Following some localized security improvements in 2018, the refugee caseload declined by about 10 percent in the last quarter of the year, decreasing for the first time since the start of the conflict in 2013.

South Sudan

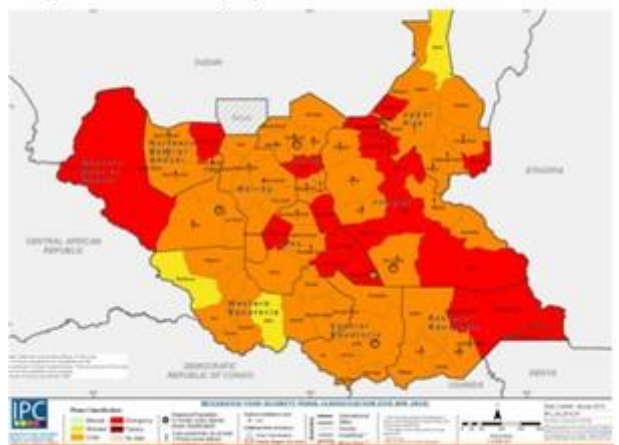
Crop Calendar (*major foodcrop)



Source:

South Sudan - Integrated Food Security Phase Classification (IPC)

Projection February-April 2019



Source: FAO/GIEWS Earth Observation System.

Erratic rains at start of 2019 cropping season

With an early onset of seasonal rains, above-average rains were received in the third dekad of February over southern and western cropping areas. However, dry conditions prevailed in the first dekad of March (see precipitation anomaly map), with a negative impact on the germination of early planted crops.

According to the latest Greater Horn of Africa Climate Outlook Forum weather forecast, rains in the remainder of March and up to May are likely to be generally favourable. Above-average amounts are expected over most of the southern bi-modal rainfall areas of the Greater Equatoria Region and average precipitations are forecast over the rest of the country. Nevertheless, widespread insecurity and soaring prices of inputs continue to severely affect agricultural activities and a below-average 2019 harvest is likely.

Crop production plunging in 2018 due to conflict and poor seasonal rains

Harvesting of the 2018 main season crops was completed in January. According to the results of the 2018 FAO/WFP Crop and Food Security Assessment Mission, the 2018 aggregate cereal production (including first season crops harvested last July/August), is estimated at about 745 000 tonnes. This output is 2.5 percent down from 2017, about 15 percent below the average of the previous five years and the smallest recorded since the start of the conflict in 2013. As a result, the overall cereal deficit in the January/December 2019 marketing year is estimated at about 518 000 tonnes, 11 percent above the deficit estimated for 2018.

The harvested area slightly increased from the very low levels of 2017 following some localized security improvements, which encouraged voluntary returns of displaced farmers. However, the area remained well below the pre-conflict levels, as the conflict continued to severely affect agricultural activities constraining access to fields. In addition, yields were constrained by a poor performance of seasonal rains over most cropping areas, especially during the second half of the growing season, as severe dryness in July was followed by erratic and below-average rains until October.

Common pests, weeds and Fall Armyworm outbreaks caused some damage on maize and sorghum crops, as most farmers do not have access to pesticides and herbicides, resorting only to traditional practices including manual removal.

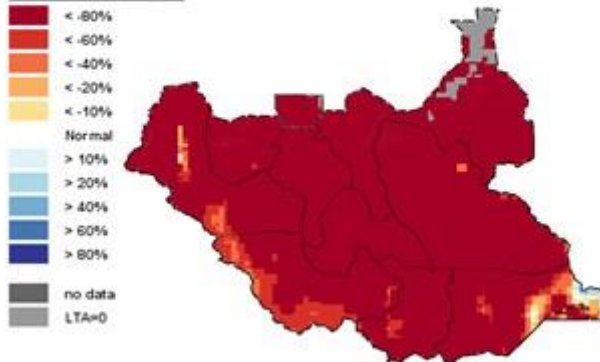
Food prices resuming increasing trend in early 2019

In the capital, Juba, prices of sorghum, maize and wheat, surging since early 2016 and at record levels in mid-2018, declined by 30-50 percent in the second semester of the year, mainly due to the appreciation of the South Sudanese Pound following the beginning of the peace talks in June 2018. Increased availabilities from the newly harvested 2018 crops exerted additional downward pressure on prices. Subsequently, prices surged by 15-40 percent in January and February 2019 as the South Sudanese Pound depreciated again. Prices in February were around their year-earlier levels but up to twice the already exceptional highs recorded two years earlier. The high price

South Sudan - Precipitation anomaly

Relative difference to LTA - Dekad 1, March 2019

Difference to LTA



Source: FAO/GIEWS Earth Observation System.

South Sudan

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
Sorghum	759	667	650	-2.5
Maize	118	92	90	-1.8
Millet	6	5	5	0
Total	883	764	745	-2.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

South Sudan

Retail prices in Juba

South Sudanese Pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

levels are the result of tight supplies, widespread insecurity hindering market functioning, trade flows and agricultural activities, high transport costs and a weak local currency.

Following a decline in the number of security incidents with the beginning of the peace talks, trade and marketing activities improved in the second half of 2018 in some areas, including the Juba-Nimule road, which connects with Ugandan markets. However, trade activities remain generally lower than their pre-conflict levels, as insecurity still prevails in several areas.

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GIEWS Country Brief South Sudan

Reference Date: 25-September-2018

FOOD SECURITY SNAPSHOT

- Food security situation is dire across the country, with 6 million people, about 60 percent of total population requiring urgent humanitarian assistance
- Crop production in 2018 expected to recover in some areas from record low levels of 2017 following localized improvements in terms of security
- Aggregate 2018 output still forecast at below-average levels due to protracted and widespread conflict
- Food prices declining in recent months following appreciation of local currency, but still at very high levels

Food security situation continues to be dire across the country

The limited food availabilities in 2018 following the record low cereal production obtained in 2017, coupled with severe access constraints to markets and high food prices, resulted in a sharp deterioration of an already alarming food insecurity situation. In July, at the peak of the lean season, the food insecure caseload was estimated at 6 million people (about 60 percent of the total population), approximately 20 percent higher than one year earlier, due to persistent conflict, large scale displacements, poor economic conditions and severe constraints to humanitarian access and assistance. Of particular concern is the food security situation in Leer and Mayendit counties (former Unity State), in Duk, Canal/Pigi, Fangak and Pibor counties (former Jonglei State) and in Raga and Wau (Baggari) counties (former Western Bahr el Ghazal State), as the local population has been facing recurrent violence and displacements and has been cut off from humanitarian assistance between mid-April and mid-July due to severe insecurity.

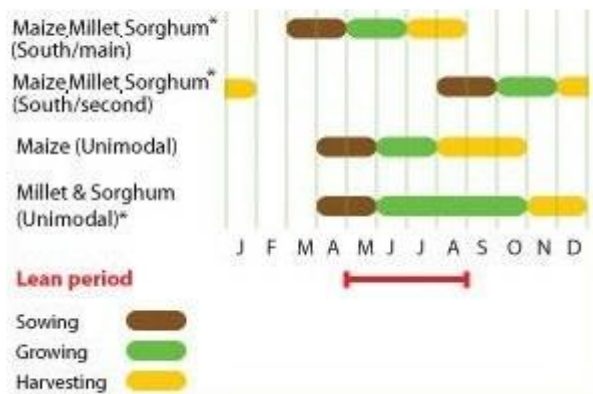
Since the start of the conflict in mid-December 2013, about 4.5 million people have been forced to flee their homes due to insecurity, including about 2 million IDPs and 2.5 million people that sought refuge in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).

Production prospects for 2018 crops generally unfavourable

In southern bi-modal rainfall areas, harvesting of first season crops was concluded in August. Seasonal rains were generally adequate, except in some areas of former Central Equatoria

South Sudan

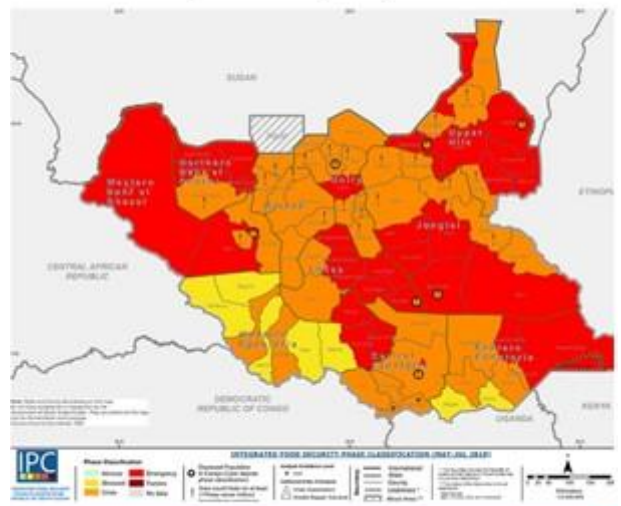
Crop Calendar (*major foodcrop)



Source:

South Sudan – Integrated Phase Classification

Projection May – July 2018



Source: FAO/GIEWS Earth Observation System.

State and in the Kapoeta Region of the former Eastern Equatoria State, where prolonged dry spells in July affected the maturation of late-planted maize and groundnut crops. The rainy season had a good performance also in most northern and central uni-modal rainfall areas, where harvesting of short cycle sorghum and maize crops has recently started and long cycle sorghum crops will be gathered from November to January. However, in several areas of former Northern Bahr el Ghazal State, dry spells in late May and in June affected sorghum crops at germination and early vegetative stages and forced farmers to replant up to three times. In former Jonglei State, dryness in late June and in July caused moisture stress on sorghum crops and is expected to constrain yields.

Despite the generally favourable weather conditions and a slight increase in planted area from the record low levels of 2017 due to localized security improvements, production prospects for 2018 crops are unfavourable due to the prolonged conflict. Widespread insecurity and violence continue to severely affect agricultural activities, constraining access to fields and causing large scale and recurrent displacement of people, as well as damage to households' productive assets. In addition, poor macro-economic conditions have resulted in shortages and soaring prices of inputs, with prices of seeds and tools recently reported at twice the levels of one year ago. Despite generally low infestation levels, Fall Armyworm outbreaks, mainly affecting maize, are expected to further constrain crop production as most farmers could not afford to buy pesticides and resorted only to traditional practices to control the pest.

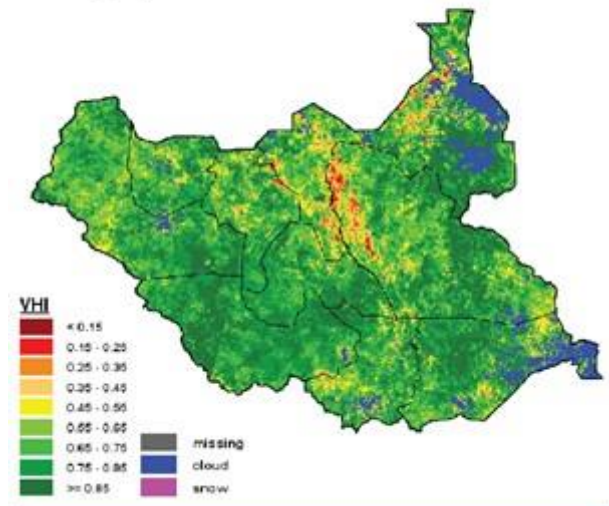
Food prices declining, but still very high

In the capital, Juba, prices of maize, sorghum, wheat, cassava and groundnuts, after having continued their sustained upward trend in the first semester of 2018, decreased by 10 to 25 percent between June and August. The price declines were mainly driven by a substantial appreciation of the local currency on the parallel market, from SSP 300 per US dollar in May to SSP 215 per US dollar in mid-August. The strengthening of the local currency is likely due to renewed speculator and investor confidence over the improved political stability and the resumption of oil production following the signing of a peace agreement in late June. Additional downward pressure on food prices was exerted by increased crop availability and reduced prices of imports in neighbouring Uganda following the first season harvest in southern bi-modal rainfall areas. Prices of sorghum and maize in August were 5-10 percent lower than one year earlier, but still about twice their levels in August 2016. Prices of cassava, groundnuts and wheat in August were 15-45 percent higher than 12 months earlier and between two and three times their levels in August 2016. Overall, the high price levels are due to widespread insecurity disrupting transport and trade activities, a tight supply situation, hyperinflation and a still significantly depreciated local currency.

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South Sudan - Vegetation Health index (VHI)

Dekad 1, September 2018



South Sudan

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Sorghum	759	667	700	4.9
Maize	118	92	97	5.8
Millet	6	5	5	5.0
Total	883	764	802	5.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

South Sudan

Retail prices in Juba

South Sudanese Pound per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief South Sudan

Reference Date: 29-March-2018

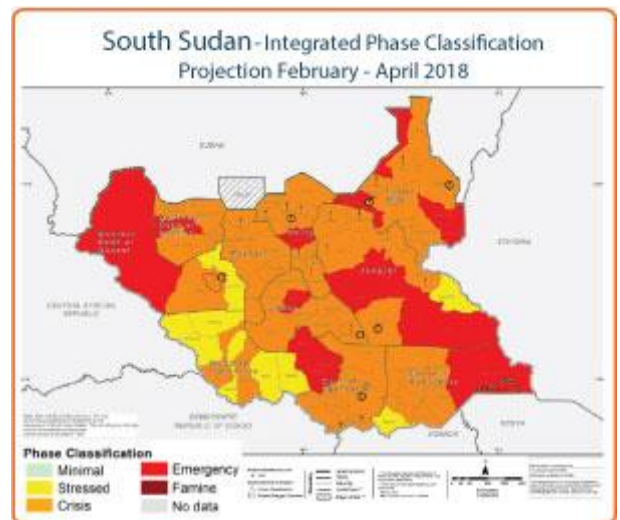
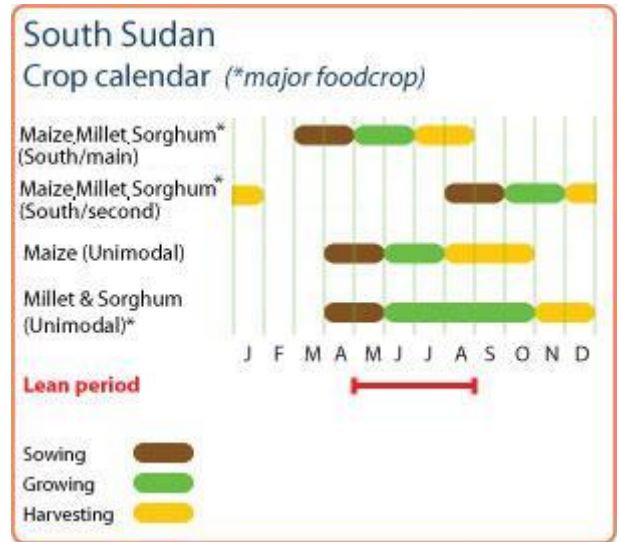
FOOD SECURITY SNAPSHOT

- Overall food security situation continues to deteriorate with 6.33 million individuals estimated to be food insecure in absence of humanitarian assistance
- Early onset of seasonal rains encouraged early planting in southern bi-modal rainfall areas
- Improved security situation in parts of Greater Equatoria Region may result in increase in planted area
- Cereal production in 2017 estimated at record low level due to widespread insecurity and massive displacements in southern key-growing areas
- Food prices continue at exceptionally high levels

Already dire food security situation continues to deteriorate

Food availability and access continue to be severely constrained by the widespread and protracted conflict, large-scale displacements, high food prices, market disruptions, macro-economic collapse and exhaustion of households' coping mechanisms. An earlier-than-normal start of the lean season, due to the reduced 2017 crop production, resulted in an increase of the food insecure caseload (IPC Phases 3, 4 and 5), from 4.8 million people at the end of 2017 to 6.33 million in the February-April 2018 period. The current caseload is estimated in the absence of humanitarian assistance and it represents about 57 percent of the total population, almost 30 percent more than in the corresponding period of the previous year. Great concern exists for the 50 000 people estimated to face IPC Phase 5: "Catastrophe" food insecurity conditions in Ayod, Nyirol and Urol counties in the former Jonglei State and in Leer, Mayendit and Panyijiar counties in the former Unity State. At the peak of the lean season, from May to July 2018, a further deterioration in the food security situation is anticipated, reaching the record level of 7.1 million severely food insecure people.

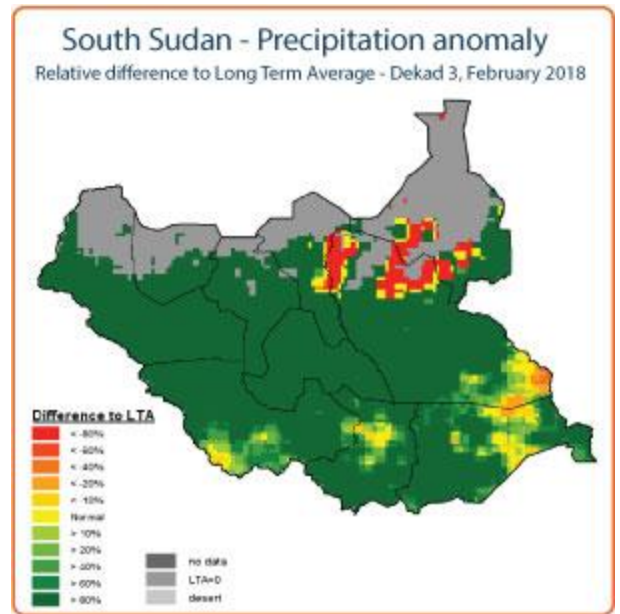
Since the start of the conflict in mid-December 2013, about 4.3 million people were forced to flee their homes due to widespread insecurity and violence, including about 1.9 million IDPs and 2.4 million that sought refuge in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).



Early onset of seasonal rains encouraging early planting in southern areas

Seasonal rains had an early onset in the third dekad of February. Rains continued in March with adequate amounts in the southern bi-modal rainfall areas of the Greater Equatoria Region, where farmers engaged in the early planting of maize and garden crops. Currently, the security situation in some areas of the Greater Equatoria Region is improving and this may result in better access to land for farmers with an increase in planted area. However, Fall Armyworm (FAW) outbreaks are reported to be attacking germinating maize crops with likely negative effects on yields.

According to the latest Greater Horn of Africa Climate Outlook Forum weather forecast, March-May rains are likely to be generally favourable, with above-average levels over the southern bi-modal rainfall areas of the Greater Equatoria Region and in the southern parts of the former Lakes and Jonglei states and average precipitations over the rest of the country.



Crop production plunging in 2017 due to conflict and large-scale displacements

Harvesting of the 2017 main season crops was completed in January. According to the results of the 2017 FAO/WFP Crop and Food Security Assessment Mission, the 2017 aggregate cereal production (including first season crops harvested last July/August) is estimated at about 764 000 tonnes, 7 percent down from 2016, 14 percent below the average of the previous five years and the smallest recorded output since the start of the conflict in 2013. Despite overall favourable weather conditions, the dismal performance of the 2017 cropping season is mainly due to the impact of the conflict on plantings and agricultural operations, especially in the key-growing areas of the Greater Equatoria Region and in the former Western Bahr el Ghazal State. Compared to 2016, production almost halved in the former Central Equatoria State, where the widespread insecurity resulted in an exodus of about 550 000 people in 2017, with an ensuing sharp reduction of the number of households actively engaged in farming activities. In addition to the endemic presence of common pests, FAW outbreaks, detected in the country for the first time in 2017, caused some damage on maize and sorghum crops in more than 20 counties.

Cereal domestic availability is also constrained by reduced imports, due to insecurity disrupting trade flows along the main routes, notably the Juba-Nimule road, which connects with Ugandan markets. Maize flour imports in mid-2017 were roughly 75 percent below compared to 2016, while sorghum imports in the fourth quarter of 2017 were almost 30 percent below the volumes imported during the fourth quarter of 2016 and 15 percent below the average of the fourth quarters of the previous four years.

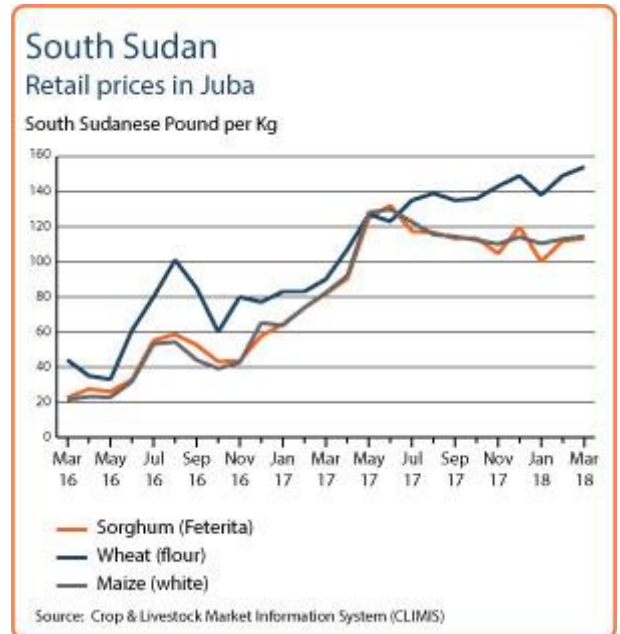
Food prices at exceptionally high levels

In the capital, Juba, prices of maize and sorghum declined by 15-25 percent between June 2017 and January 2018, following the 2017 harvests and the establishment by the Government of a trading company selling basic food commodities at subsidized prices. Subsequently, prices increased by 5-15 percent between January and March. Similarly, prices of wheat flour increased by about 15 percent over the same period. Prices of cassava were

South Sudan
Cereal production

	2012-2016	2016	2017	change
	average		estimate	2017/2016
000 tonnes				
Sorghum	763	712	667	-6
Maize	119	107	92	-14
Millet	6	6	5	-17
Others	0	0	0	0
Total	888	825	764	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



stable in recent months, while prices of groundnuts increased by 15 percent in March. Overall, prices of the main food staples in March 2018 were up to 75 percent higher than the high levels in March 2017, driven by a tight supply situation, a significant depreciation of the local currency and trade disruptions due to insecurity.

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GIEWS Country Brief South Sudan

Reference Date: 14-September-2017

FOOD SECURITY SNAPSHOT

- Famine phased out, but food security situation still dire across the country
- Food insecure caseload estimated at record high 6 million in June 2017
- Unfavourable prospects for 2017 crops due to widespread insecurity, large scale displacements and Fall Armyworm infestations
- Food prices at exceptionally high levels

Famine phased out, but food security situation still dire

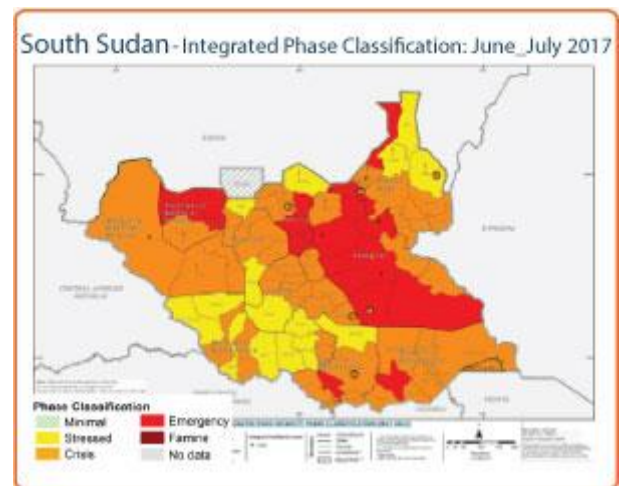
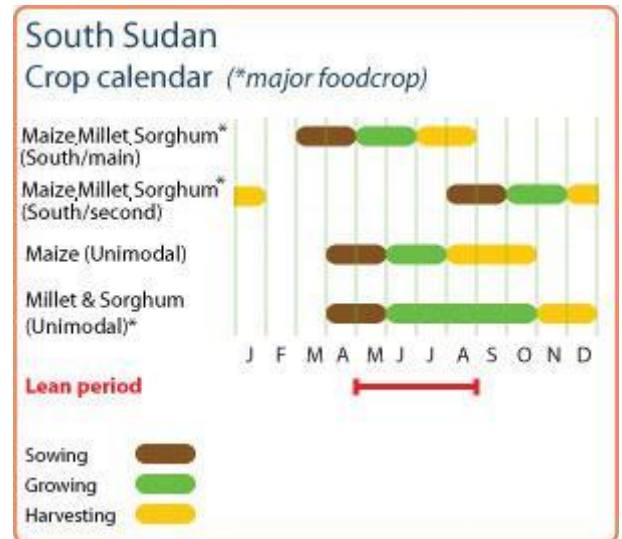
According to the latest IPC analysis, famine conditions, previously reported in February 2017 in former Leer and Mayendit counties in former Unity State, were no longer occurring by late June 2017. Overall, the number of people facing IPC Phase 5: "Catastrophe" food security conditions declined from over 100 000 in February to about 45 000 in June due to sustained multi-sectoral humanitarian assistance operations and the two counties are currently classified as IPC Phase 4: "Emergency".

However, nationwide, the food insecure caseload (IPC Phases 3, 4 and 5) increased from about 5 million in February to a record high of 6 million in June as food access continues to be severely constrained by widespread insecurity, large scale displacements, high food prices, market disruptions, macro-economic collapse and exhaustion of households' coping mechanisms. The areas of major concern are Greater Jonglei and Unity states, where over 60 percent of the population faces "Crisis", "Emergency" and "Catastrophe" levels of food insecurity. In particular, the people facing catastrophic conditions are located in Ayod County in Greater Jonglei State and in Leer, Koch and Mayendit counties in Unity State.

Since the start of the conflict in mid-December 2013, about 3.9 million people were forced to flee their homes due to insecurity, including about 1.9 million IDPs and 2 million that sought refuge in neighbouring countries (Uganda, the Sudan, the Democratic Republic of the Congo, Ethiopia and Kenya).

Sharply reduced crop production expected in 2017 due to conflict and pest outbreaks

In southern bi-modal rainfall areas, harvesting of first season crops was concluded in August. Seasonal rains were above-



average in the “green belt”, including the former Central and Western Equatoria states, while in the former Eastern Equatoria State they started in late April with about a one-month delay. In northern and central uni-modal rainfall areas, harvesting of short cycle sorghum and maize crops has recently started, while long cycle sorghum crops will be gathered from November to January. Weather conditions have been generally favourable so far as seasonal rains have been average to above average, thus benefiting vegetation conditions.

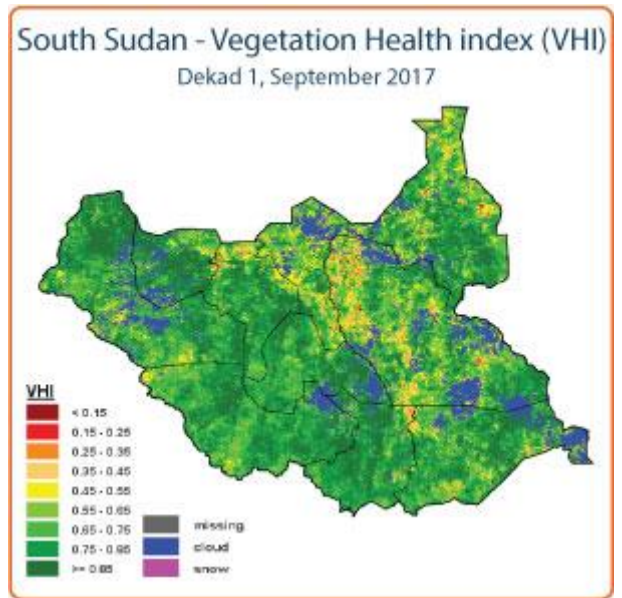
However, prospects for 2017 aggregate cereal production are generally unfavourable as agricultural activities continue to be severely affected by the protracted and widespread insecurity, which is constraining farmers’ access to fields and is causing large scale displacement of people, input shortages and damage to households’ productive assets. In the traditionally surplus-producing areas of southern Greater Equatoria Region, crop production is expected to be lower than the already poor 2016 output due to recent massive displacements outside the former Central and Eastern Equatoria states. Notably, about 75 percent of the population of the former Central Equatoria State has reportedly left their living areas.

In addition, Fall Armyworm infestations have been reported in all regions of the country, with significant crop damage, especially in parts of former Northern Bahr el Ghazal, Eastern Equatoria and Central Equatoria states.

Prices of cereals at exceptionally high levels

In the capital, Juba, prices of maize and sorghum more than doubled in the first semester of 2017, reaching record levels in June, driven by a tight supply situation, market disruptions, hyperinflation and a significant depreciation of the local currency. Subsequently, they declined by about 12 percent between June and August, following the first season harvest in southern bi-modal rainfall areas and the establishment, by the Government, of a trading company selling basic food commodities at subsidized prices. Prices of groundnuts decreased by 22 percent over the same period, while prices of wheat flour continued to soar in recent months, reaching new record highs in August. Overall, prices of these food staples in August were more than twice the high levels in August last year and up to 12 times higher than in the corresponding period two years earlier.

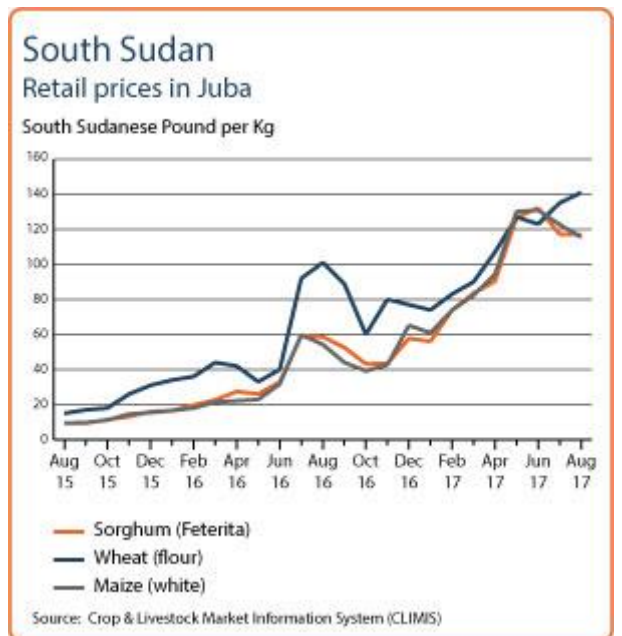
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South Sudan Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Sorghum	763	712	700	-2
Maize	119	107	100	-7
Millet	6	6	6	0
Others	0	0	0	0
Total	888	825	806	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets





GIEWS Country Brief South Sudan

Reference Date: 09-May-2017

FOOD SECURITY SNAPSHOT

- Famine declared in parts of former Unity State
- About 5 million people estimated severely food insecure until July 2017
- Crop production declined in 2016 due to insecurity and displacement of farmers
- Localized early season dryness and protracted insecurity affecting 2017 first season crops in southern bi-modal rainfall areas
- Food prices at exceptionally high levels

Famine declared in parts of former Unity State

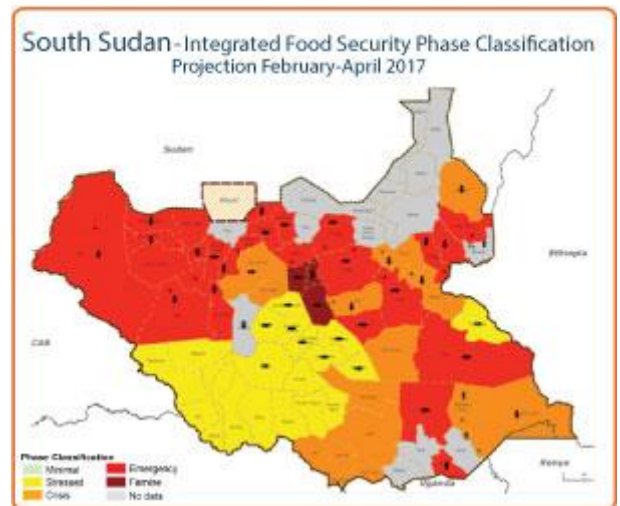
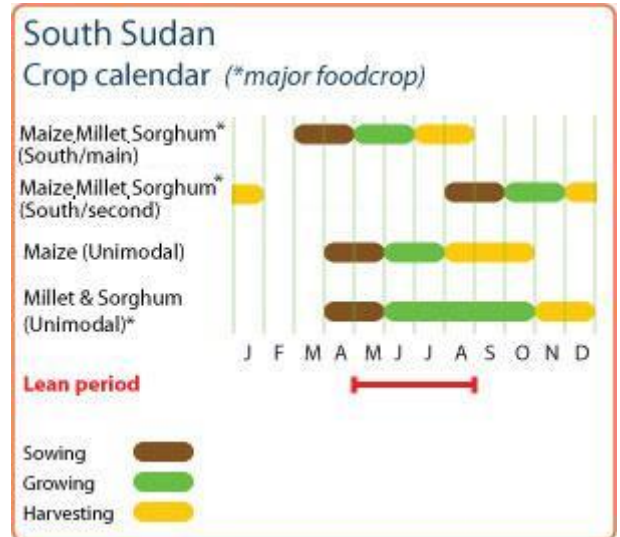
According to the latest IPC analysis, localized famine conditions are currently reported in former Unity State, with a caseload of about 100 000 people in IPC Phase 5: "Catastrophe" in former Leer and Mayendit counties. In addition, there is an elevated risk that famine is occurring also in former Koch County, but it cannot be confirmed due to limited available evidence, while in former Panyijiar County famine has been avoided so far only through humanitarian assistance operations.

Nationwide, food insecurity has escalated during the last three years due to conflict, violence, macro-economic collapse and exhaustion of households' coping mechanisms. Between February and April 2017, about 4.9 million people, over 40 percent of total population, are estimated to be severely food insecure and this figure is projected to reach 5.5 million people at the peak of the lean season in July. Although most food insecure people are concentrated in the Greater Upper Nile Region, food security has drastically deteriorated in former Northern Bahr el Ghazal State and the Greater Equatoria Region.

Since the start of the conflict in mid-December 2013, according to OCHA, about 3.8 million people were forced to flee their homes due to insecurity, including about 1.97 million IDPs, with about 217 000 people in UNMISS Protection of Civilians (PoC) sites across the country and 1.83 million people that fled into neighbouring countries (Uganda, the Sudan, the Democratic Republic of Congo, Ethiopia and Kenya).

Below-average crop production estimated in 2016 due to insecurity and displacements

Harvesting of the 2016 main season crops was completed in January. According to the preliminary results of the FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the



South Sudan Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Sorghum	718	772	712	-8
Maize	112	140	107	-24
Millet	5	8	6	-25
Others	0	0	0	0
Total	836	920	825	-10

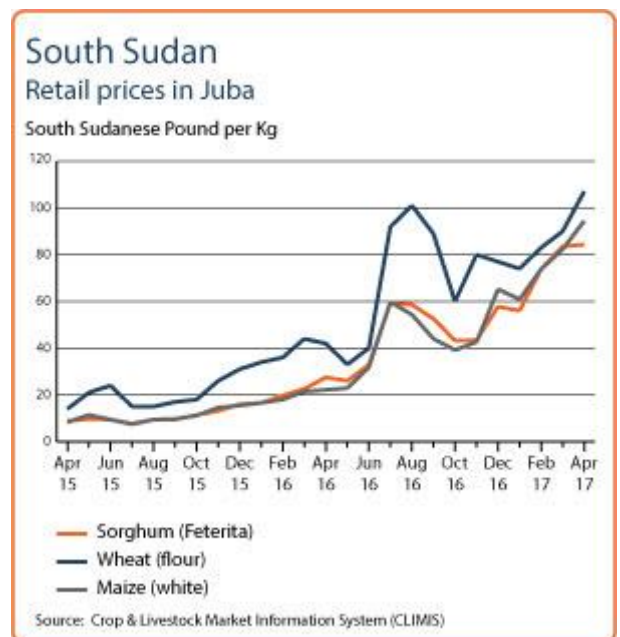
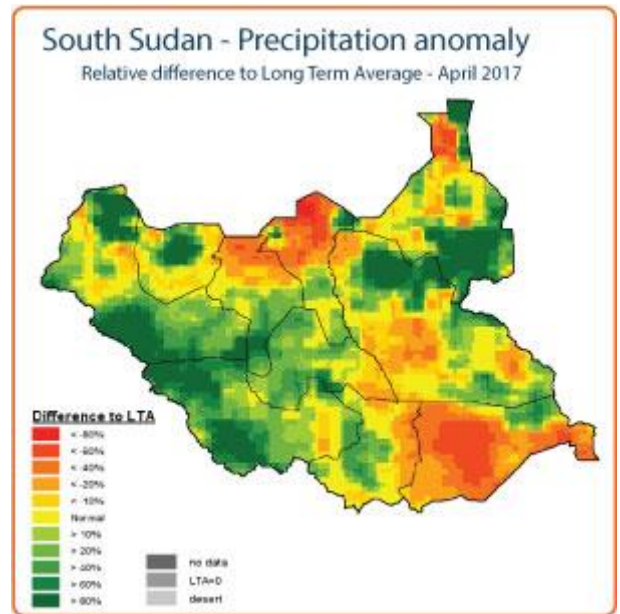
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

overall production, including first season crops harvested last July/August, for 2016 is estimated at a below-average level of 825 000 tonnes, about 10 percent below the previous year's output. Despite favourable rains across the country, except in the eastern Greater Kapoeta Region, crop production has been severely affected by increasing displacements and insecurity, following the renewed conflict in July, that disrupted agricultural activities, including harvesting. In particular, the area planted with second season crops in the "green belt" has been well-below the average, with most households being able to cultivate only small plots near homesteads, mainly with vegetables.

In southern bi-modal rainfall areas, planting of first season crops, to be harvested from July, has just been completed. Seasonal rains had a timely onset in the third dekad of March. Subsequently, rains in April were average to above-average in the "green belt", including former Central and Western Equatoria states. By contrast, in the former Eastern Equatoria State, accumulated rainfall in April was about 40 percent below average, with a negative impact on planting activities and on the germination of early-planted crops. According to the latest weather forecast by the Greater Horn of Africa Consensus Forum (GHACOF), rains in May will continue to be above average in southwestern and central areas and below average in southeastern parts. Agricultural activities continue to be affected by the protracted and widespread insecurity, which is constraining access to fields and is causing large-scale displacement of people, input shortages and damage to households' productive assets.

Prices of cereals at exceptionally high levels

In the capital, Juba, prices of sorghum and maize declined in January 2017 by 3 and 7 percent, respectively, partly as a result of the harvesting of the 2016 second season crops in southern bi-modal rainfall areas. In February, prices resumed their increasing trend, surging by 50-55 percent between February and April and reaching new record highs. Prices of other important food staples followed similar patterns, with wheat and cassava prices increasing by 45-56 percent between February and April and prices of groundnuts more than doubling over the same period. Overall, in April, staple food prices in Juba were between two and more than five times their levels in April last year, due to insecurity, a tight supply situation, hyper-inflation and a significant depreciation of the local currency.





GIEWS Country Brief South Sudan

Reference Date: 21-February-2017

FOOD SECURITY SNAPSHOT

- Famine declared in parts of former Unity State
- About 5 million people estimated to be severely food insecure until July 2017
- Crop production declines due to insecurity and displacement of farmers
- Food prices at exceptionally high levels

Famine declared in parts of former Unity State

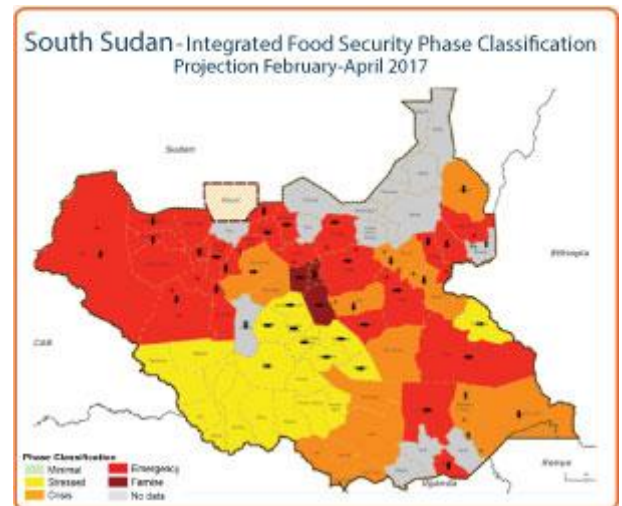
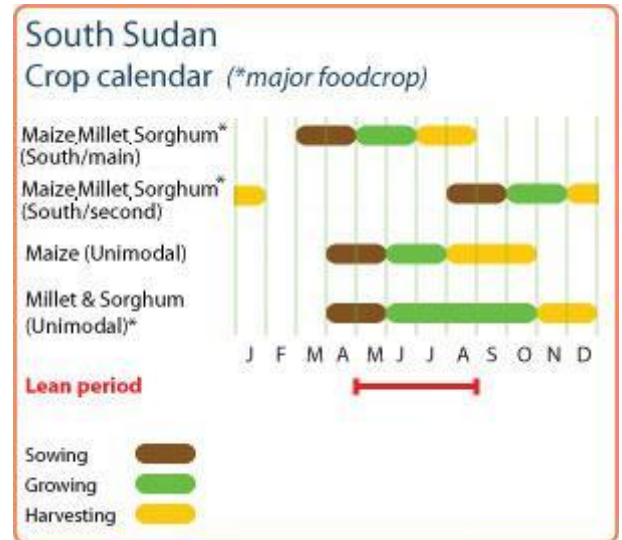
According to the latest IPC analysis, localized famine conditions are currently reported in former Unity State, with a caseload of about 100 000 people in IPC category 5 (“Catastrophe”) in former Leer and Mayendit counties. In addition, always in former Unity State, there is an elevated risk that famine is occurring also in former Koch County, but it cannot be confirmed due to limited available evidence, while in former Panyijiar County famine has been avoided so far only thanks to adequate humanitarian assistance.

Nationwide, food insecurity has escalated during the last three years due to conflict, violence, macro-economic collapse and exhaustion of households’ coping mechanisms. Between February and April 2017, about 4.9 million people, over 40 percent of total population, are estimated to be severely food insecure and this figure is projected to reach 5.5 million people at the peak of the lean season in July. Although most food insecure people are concentrated in the Greater Upper Nile region, food security has drastically deteriorated in former Northern Bahr el Ghazal State and the Greater Equatoria Region.

Since the start of the conflict in mid-December 2013, according to OCHA and UNHCR, over 3 million people were forced to flee their homes due to insecurity, including about 1.85 million IDPs, with about 195 000 people in UNMISS Protection of Civilians (PoC) sites across the country, and 1.2 million people that fled into neighbouring countries (Uganda, the Sudan, the Democratic Republic of Congo, Ethiopia and Kenya).

Below-average crop production estimated in 2016 due to insecurity and displacements

Harvesting of the 2016 main season crops was completed in January. According to the preliminary results of the FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the overall production (including first season crops harvested last July/August) for 2016 is estimated at below-average level of



South Sudan Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Sorghum	718	772	712	-8
Maize	112	140	107	-24
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Source: FAO/GIEWS Country Cereal Balance Sheets

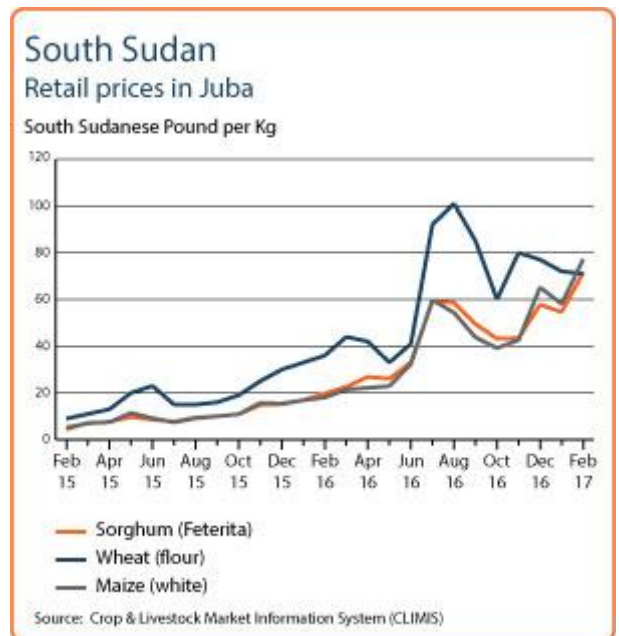
826 000 tonnes, about 10 percent below the previous year's output. Despite favourable rains across the country (except in Greater Kapoeta region in the east), crop production has been severely affected by increasing displacements and insecurity (following the renewed conflict in July) that hampered cultivation activities, including harvesting. In particular, area planted with second season crops in the "green belt" has been well-below average, with most households being able to cultivate only small plots near homesteads, mainly with vegetables.

Land preparation for planting first season crops is about to start in southern bi-modal rainfall areas. According to the latest weather forecast by the Greater Horn of Africa Consensus Forum (GHACOF), the March-to-May rainy season is expected to be drier than usual in south-eastern areas of the country, including former Eastern Equatoria State and the southern part of former Jonglei State, while above-average rainfall amounts are expected in the "green belt", including former Central and Western Equatoria states.

Prices of cereals at exceptionally high levels

In the capital, Juba, prices of sorghum and maize peaked in December 2016 and subsequently declined in January 2017 by 6 and 10 percent, respectively, partly as a result of the harvesting of the 2016 second season crops in southern bi-modal rainfall areas. In February, prices resumed their increasing trend, surging by about 30 percent and reaching new record highs. Prices of cassava and groundnuts followed similar patterns, increasing by 15 and 30 percent in February, while prices of wheat, after having peaked in August 2016, declined by 30 percent between August 2016 and February 2017. Overall, in February, staple food prices in Juba were between 2 and more than 4 times their levels in February last year, due to insecurity, a tight supply situation, hyperinflation and a significant depreciation of the local currency.

In markets located in central and northern uni-modal rainfall areas, prices of sorghum, after having peaked in July/August, declined on average by about 40 percent between July/August and November 2016 as newly harvested crops increased supplies. Subsequently, prices resumed their upward trend, increasing by about 20 percent between November 2016 and January 2017, when they were between 3 and 10 times higher than 12 months earlier.





GIEWS Country Brief South Sudan

Reference Date: 16-November-2016

FOOD SECURITY SNAPSHOT

- Crop production forecast at below-average levels due to insecurity and displacement of farmers
- Food prices decline, but still very high
- Over 3.7 people estimated to be severely food insecure, one million more than one year ago
- Food insecurity expected to worsen dramatically during first semester of 2017

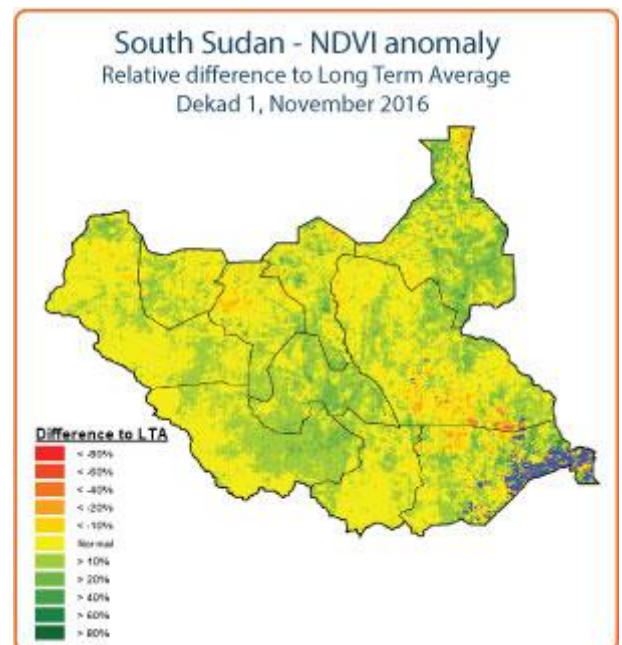
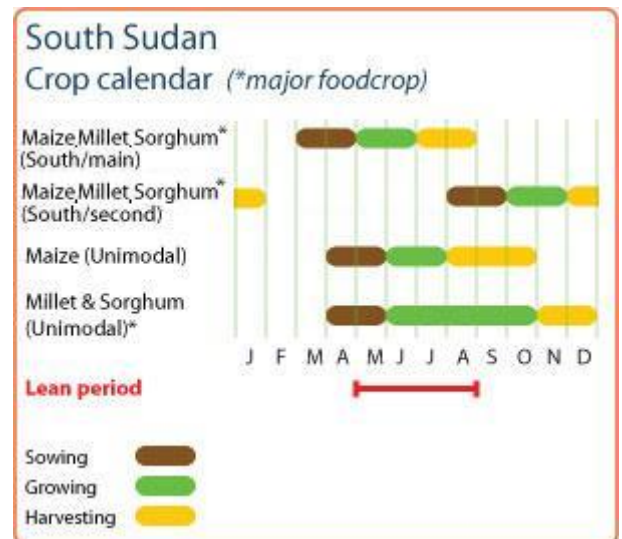
Below-average crop production expected in 2016 due to insecurity and displacements

In bi-modal rainfall areas of Greater Equatoria region, harvesting of the 2016 first season crops has been completed at the beginning of September and production is estimated at below-average levels. Despite average to above-average plantings in March/April and favourable rains across the season (April-June), crop production has been severely affected by increasing displacements and insecurity (following the renewed conflict in July) that hampered cultivation activities, including harvesting. For the same reasons, areas planted with the 2016 second season crops (to be harvested by December) have been well-below average, with most households being able to cultivate only small plots near homesteads, mainly with vegetables.

In uni-modal rainfall areas, harvesting of the 2016 main season crops is underway and it will be completed at the end of December/early January. Although the planted area has increased in several counties (due to a relatively peaceful context in April/May) and the June-to-September rains have been generally favourable (with only localized floods in Greater Upper Nile region), production is expected to be at below-average levels as insecurity have often prevented farmers to access fields and to perform adequate cultivation practices. Frequent cases of abandoned fields are reported across the country. In particular, a significant decrease in area planted is observed in Northern Bahr el Ghazal State following mass migration of people to Sudan in search of food and income opportunities.

Prices of cereals declined in recent months, but still at very high levels

Prices of cereals started to soar in late 2015 on account of local currency devaluation, a general economic downturn and widespread insecurity. For instance, in the capital Juba, prices of maize and sorghum tripled between November 2015 and



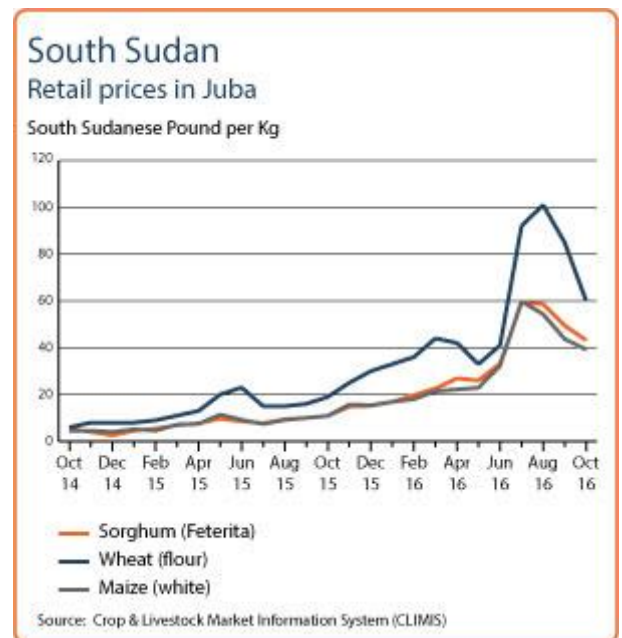
June 2016, while prices of wheat flour more than doubled over the same period. In July 2016, the already sustained price increases further accelerated due to the intensification of the conflict, with cereal prices almost doubling in Juba's market in only few weeks and reaching new record highs. Subsequently, prices of maize and wheat flour declined by about 35 percent between August and October, while prices of sorghum decreased by 27 percent over the same period, as newly harvested crops, significant imports from Uganda and food assistance operations increased supplies. The stabilization of the exchange rate in October, after the sharp devaluation of the local currency since December 2015, eased inflationary pressures and contributed to the price declines. However, despite the downward trend followed in recent months, cereal prices in October remained about two to three times above their levels of year before, due to insecurity, disrupting trade flows, tight supplies, currency weakness, fuel shortages and high transport costs.

Severe food insecure population at high levels despite recently-harvested crops

According to latest assessment, the current number of severely food insecure people is estimated at 3.7 million, about 30 percent of the total population and with an increase of one million people compared to the same period in 2015. Food insecurity is deepening due to the general economic downturn, which is affecting particularly the urban areas with declining purchasing power of households and high prices caused by the sharp devaluation of the local currency and high transport costs. Food security conditions are expected to slightly improve until early next year as a consequence of the availability of newly harvested crops for household own consumption. However, improvements are likely to be short-lived as food stocks will be only partially replenished due to below-average production and are expected to be depleted already by February/March in some areas severely affected by the conflict.

During first semester of 2017, food insecurity is likely to rapidly deteriorate to massive proportions, with a concrete risk of famine for most vulnerable communities. Areas of major concern are central and southern counties of Unity State, Western Bahr el Ghazal, Northern Bah el Ghazal and counties of Eastern, Western and Central Equatoria that experienced high levels of insecurity in recent months with consequent massive displacement of people.

Since the start of the conflict in mid-December 2013, over 2.7 million people have fled their homes, including about 1.7 million internally displaced and one million people currently hosted in neighbouring countries (Ethiopia, Uganda, the Sudan and Kenya) as refugees.



Reference Date: 17-March-2016

FOOD SECURITY SNAPSHOT

- Land preparation underway in Greater Equatoria Region as seasonal rains expected to start soon
- March-May rains forecast at average to above-average levels in most bi-modal southern rainfall areas, while lower rainfall amounts expected in north
- Food prices still at record levels in most markets
- Despite recent harvest, number of severely food insecure people rising due to market disruptions and economic downturn
- Better access to pocket areas of starvation in southern Unity State needed to allow urgent delivery of humanitarian aid and avert deterioration of situation into famine

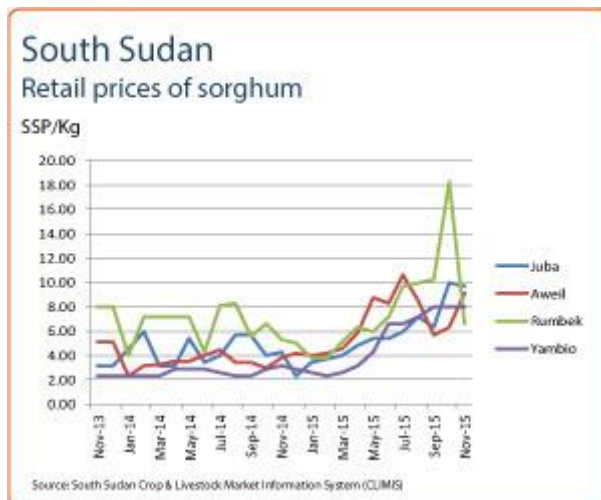
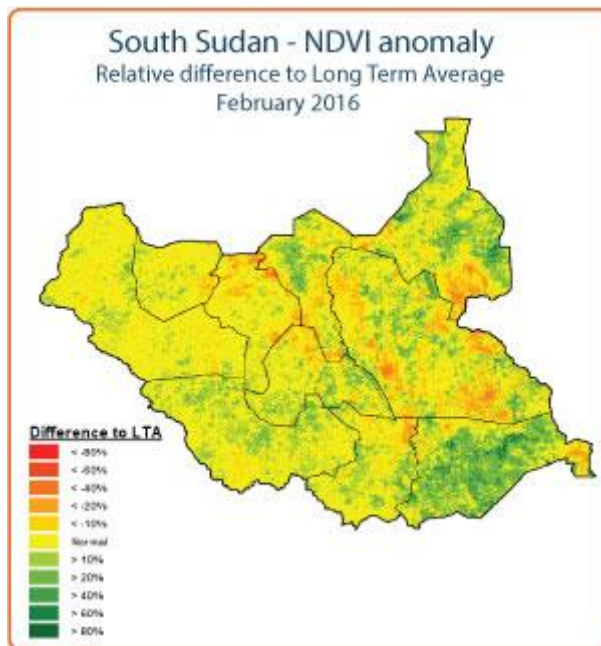
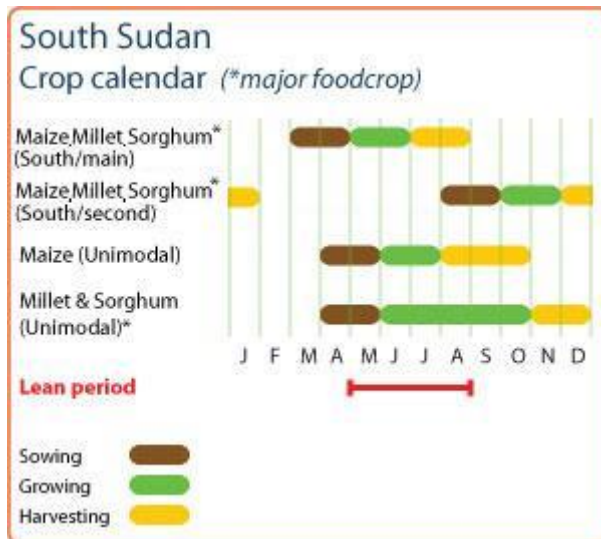
Land preparation ongoing in Greater Equatoria Region

Land is being prepared in most bi-modal rainfall areas of Greater Equatoria Region as seasonal rains are expected to start soon. According to the latest meteorological forecast, March-May rains are expected at average to above-average levels in most southern bi-modal rainfall areas, while lower amounts are expected in northern uni-modal areas, especially in Greater Bahar el Ghazal Region and in northern parts of Unity and Upper Nile states.

Harvesting of the 2015 crops was completed in January and production is estimated at 920 000 tonnes, about 9 percent below the bumper harvest gathered in 2014, but still about 16 percent above the last five-year average. Major reductions in cereal production are estimated in Western Bahr el Ghazal and Eastern Equatoria states due to unfavourable rainfall as well as in Western Equatoria State due to the disruption of cropping activities following worsening security conditions. Across the country, pasture conditions are seasonally deteriorating, in particular in Pochalla and Pibor counties in southern Jonglei State. However, they remain well above average levels in most pastoral areas of Eastern Equatoria, following abundant and extended rains at the end of last year.

Food prices still at record high levels in most markets

Despite the recent conclusion of the harvesting operations, sorghum prices in January were at record levels, between three and five times their levels of the same month of the previous year. Market activities have slightly improved in recent months in some conflict-affected areas of Greater Upper Nile Region, but food supplies remain well below the pre-crisis levels and food prices remain exceptionally high and volatile, largely influenced by the distribution of food aid. The spike in food prices at the end of 2015 coincided with the decision of the Central Bank to move from a fixed to a floating



exchange rate regime that led to a devaluation of the local currency by about 84 percent.

In the capital, Juba, with an urban population of about 430 000, prices of cereals have reached all-time records by the end of 2015. Both sorghum and maize grains were traded in December 2015 in the main wholesale market of Konyo Konyo at about SSP 12 per kg, between three and five times their levels of 12 months earlier. Similarly, wheat flour, mainly imported from Uganda and the Sudan, was traded at SSP 20 per kg in December 2015, more than three times its price one year earlier.

Severe food insecure population on the rise despite recently-harvested crops

According to latest the IPC analysis, the number of severely food insecure people between January and March 2016 is estimated at 2.8 million, about 23 percent of the total population. Despite the availability of newly-harvested crops, the number of food insecure people has increased by about 400 000 compared to December 2015. Most food insecure people are concentrated in conflict-affected areas of the Greater Upper Nile Region, due to large displacements of population and disruption of local livelihood systems. Here, livestock has been often looted and high insecurity has limited access to humanitarian assistance. Pockets of starvation are still reported in some counties of Unity State. Food security conditions have also deteriorated in Northern Bahr el Ghazal, Warrap and Eastern Equatoria states due to reduced cereal production, trade disruptions and high market prices. Overall, food security is expected to continue to worsen in the coming months as a consequence of the general economic downturn, with declining purchasing power of households and rising prices due to the sharp devaluation of the local currency and high transport costs.

Since the start of the conflict in mid-December 2013, over 2.3 million people have fled their homes, including about 1.7 million internally displaced and about 647 000 individuals currently hosted in neighbouring countries (Ethiopia, Uganda, the Sudan and Kenya) as refugees.

Reference Date: 29-October-2015

FOOD SECURITY SNAPSHOT

- **Mixed production prospects for first season crops in Greater Equatoria Region, while outlook for main season crops in Greater Bahr El Ghazal Region is generally favourable**
- **Significant decline in planted area in conflict-affected Greater Upper Nile Region due to massive displacements and escalating conflict**
- **Food prices reached record levels in most markets**
- **Declining national number of severely food insecure people due to newly-harvested crops and green crop consumption**
- **Alarming pockets of starvation reported in southern Unity State. To avert deterioration of situation into famine, better access is needed to allow urgent delivery of humanitarian aid**

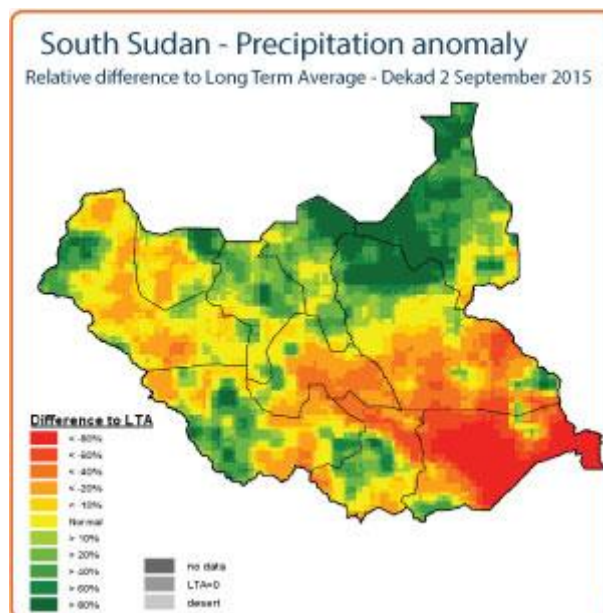
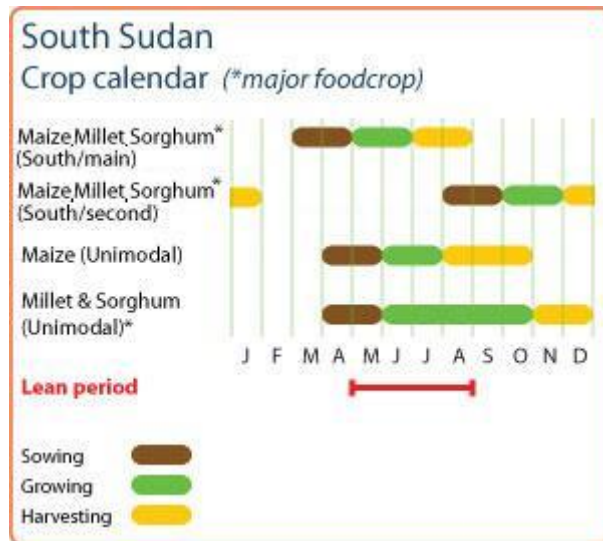
Mixed prospects for first season harvest in Greater Equatoria Region

In bi-modal rainfall areas of Greater Equatoria, the first season harvest is complete and production prospects are mixed. According to preliminary results of field assessments, yields are estimated at average levels in most cropping areas of Western and Central Equatoria states. Here, seasonal rains started early in February/March, fostering land preparation and plantings. After some dry spells in April/May that required some re-plantings, rains have been generally favourable for the remainder of the season. In Mundri East, Mundri West and Maridi counties in Western Equatoria State, serious civil insecurity in June caused displacement of farmers, leading to a significant reduction in area planted and disrupting agricultural activities, especially weeding. In Eastern Equatoria State, crop production is estimated at below-average levels in most agro-pastoral areas of Greater Kapoeta, Torit, Ikotos and Budi counties, as well as in northwestern lowland areas of Lafon County, due to erratic and poor rains since end-June.

According to satellite-based remote sensing data, rains resumed at the beginning of September in most bi-modal rainfall areas, favouring the ongoing planting activities of second season crops.

Favourable prospects for main season harvest in Greater Bahr El Ghazal Region

In uni-modal rainfall areas of Greater Bahr El Ghazal, the harvesting of short-cycle main season crops has just been completed, while long-cycle crops are still at vegetative stage and will be harvested at the end of the year. Although rains started by mid-May, with a delay of two-three dekads, production prospects are currently favourable in most areas, as rains have been generally adequate during the season. However, prolonged dry spells in July and August have affected yields in some areas of Aweil West and Aweil South



counties in Northern Bahr El Ghazal State as well as Gogrial East, Gogrial West and parts of Tonj North counties in Warrap State.

Significant decline in planted area in Greater Upper Nile Region due to insecurity

In most areas of Greater Upper Nile, remote sensing analysis shows average to above-average vegetation conditions, with localized areas of stressed vegetation in southern Baliet and Panyikang counties in Upper Nile State as well as in Yirol East, Yirol West and Awerial in Lakes state. Very poor and erratic precipitation during the whole month of August affected late-planted crops in Bor South and Pibor counties in Jonglei State.

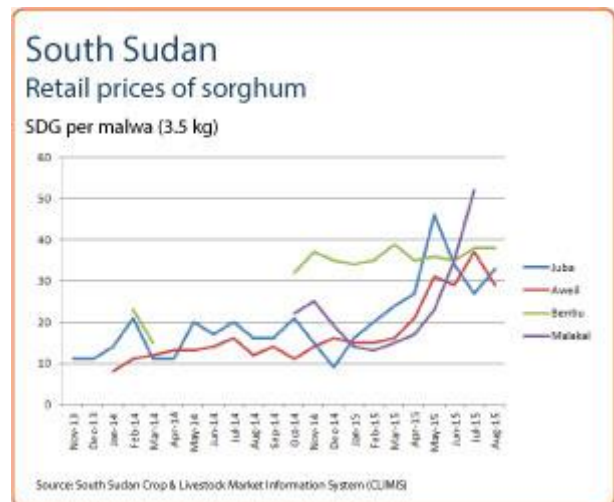
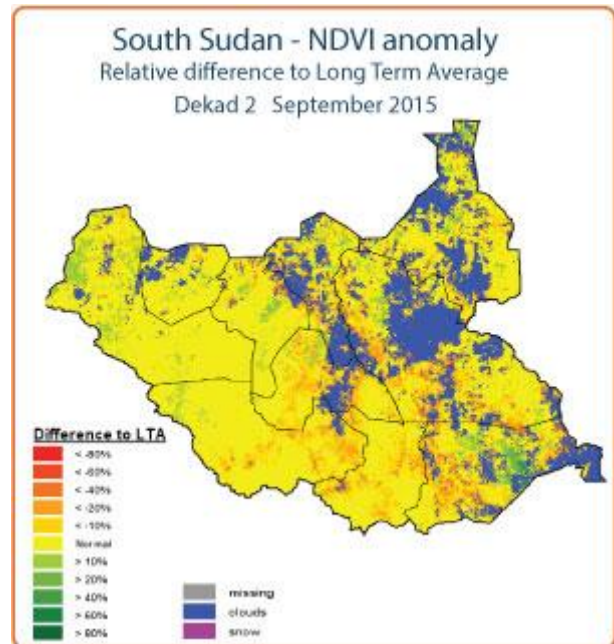
Despite the favourable vegetation conditions, a significant reduction in planted area is expected in most conflict-affected counties of Upper Nile, Unity and Jonglei states. Following the massive displacements that started in Greater Upper Nile last April/May, coinciding with planting time, it is highly probable that crops were either not planted at all or planting took place only in very small plots, with a high risk that fields have then been left un-attended when farmers were forced to flee.

Food prices at record high levels in most markets

Food prices soared last May/June when the conflict revamped in the country, reaching near-record to record levels in most markets. In August, despite the ongoing first season harvest in the region, prices of grains increased in Juba's main market by 22 percent for sorghum and 27 percent for maize. Across the country, sorghum is currently traded at about SSP 30-35/malwa (3.5 kg), more than twice higher than one year earlier, with the highest peaks registered in conflict-affected areas, such as Bentiu in Unity State (SSP 38/malwa) and Malakal in Upper Nile (SSP 52/malwa). In July, unshelled groundnuts were sold in Aweil, Rumbek and Yambio markets at record high SSP 15-25/kg, while during the first quarter of the year the average price was between SSP 4/kg and 8/kg. Similarly, the price of 1 kg of wheat flour, mostly imported from Uganda, more than doubled since the beginning of the year, increasing on average from SSP 10 to SSP 20-25.

Pockets of starvation reported in some conflict-affected areas of Unity State

According to the latest IPC analysis (September 2015), the overall food security situation has improved at national level compared to the past May-July, during the lean season, mainly due to the harvest of first season crops in August in the Greater Equatoria Region and to the availability of green crops in the rest of the country. The current estimated number of food insecure people has declined from 4.8 million at the peak of the lean season in July to 3.9 million people (34 percent of the population). This figure, about 80 percent higher than one year ago, includes people in IPC Phase: 3 "Crisis" and Phase: 4 "Emergency", plus about 30 000 people in Leer, Guit, Koch and Mayendit counties in southern Unity State in IPC Phase: 5 "Catastrophe". This situation is likely to quickly deteriorate into a famine if better access to these areas is not immediately granted in order to allow the urgent delivery of humanitarian assistance.



The highest levels of food insecurity are reported in conflict-affected states of Unity, Upper Nile and Jonglei states due to widespread displacements, disruption of livelihood systems, loss of productive assets, in particular livestock, and access constraints to humanitarian assistance. Severe problems of access to food are also reported in most counties of Northern Bahr el Ghazal, Lakes and Warrap states due to skyrocketing food prices in most markets.

As the harvest progresses until the end of the year, the food security situation is expected to progressively improve in non-conflict affected areas, while in Greater Upper Nile Region it will depend on future access of humanitarian assistance in most conflict-affected areas.

Since the start of the conflict in mid-December 2013, about 2.1 million people have fled their homes, including 1.55 million internally-displaced and about 549 000 individuals currently hosted in neighbouring countries (Ethiopia, Uganda, the Sudan and Kenya) as refugees.

Reference Date: 23-January-2015

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2014 crop production in most southern bi-modal rainfall areas
- Good yields expected in northern uni-modal rainfall areas, but reduced plantings in conflict-affected areas will lower cereal production
- Good pasture availability in general, but livestock movements are severely affected by conflict
- High cereal prices in conflict-affected areas exacerbate the precarious local food security situation
- Food security outlook likely to deteriorate soon in conflict-affected areas as households' food stocks are expected to run out by end-January
- About 2.5 million people are currently considered as severely food insecure and in need of humanitarian assistance

Favourable prospects for 2014 cereal production in most bi-modal rainfall areas

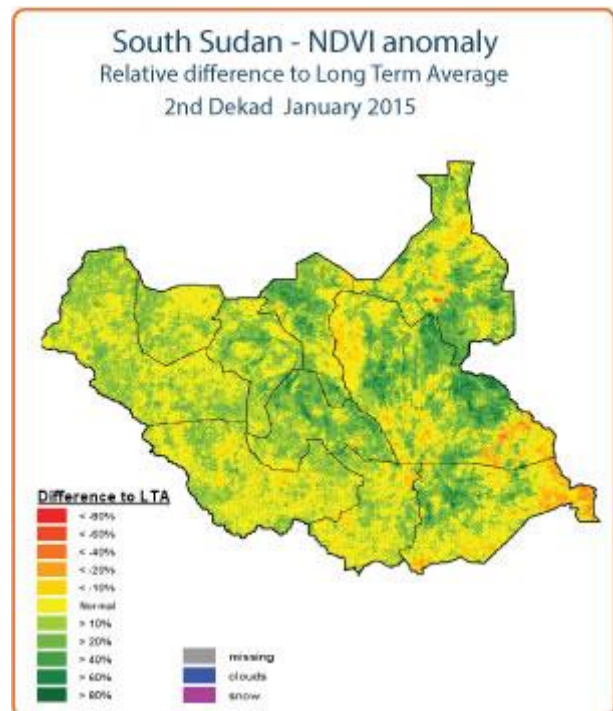
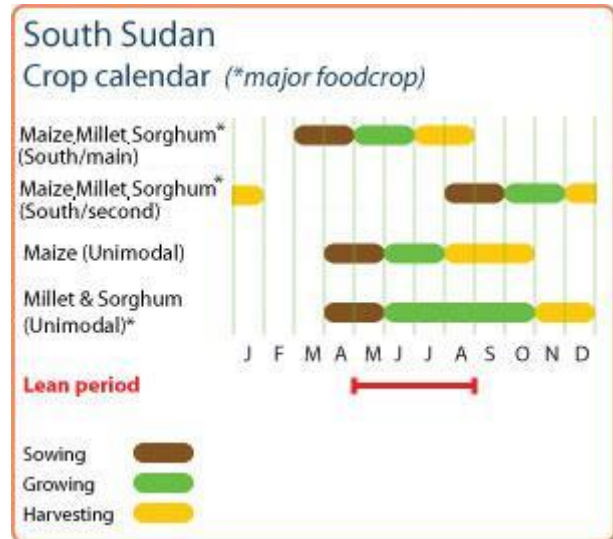
Harvesting of the 2014 second season crops has just been completed in bi-modal rainfall areas and production is estimated at average to above-average levels. Rains have generally been timely, abundant and well-distributed in most cropping areas. According to satellite-based rainfall estimates, a significant water stress was reported in September in Lopa and Kapoeta North counties of Eastern Equatoria State and in Pibor county in Jonglei State, but abundant rains during the first two dekads of October, which caused also localized flooding in low-lying areas, fully reversed the situation.

Below-average production expected in conflict-affected states due to significant reduction in area planted

In northern uni-modal rainfall areas, harvesting of 2014 long-cycle sorghum and millet crops is well advanced and yields are forecast at above-average levels following the favourable rainfall performance along the season. However, cereal production in most conflict-affected areas of Upper Nile, Unity and Jonglei states is expected at below-average levels due to a significant reduction in area planted. Some farmers were not able to plant due to displacements, while others planted plots smaller than usual, close to the homestead, due to insecurity, seed shortages and increased time spent searching for food.

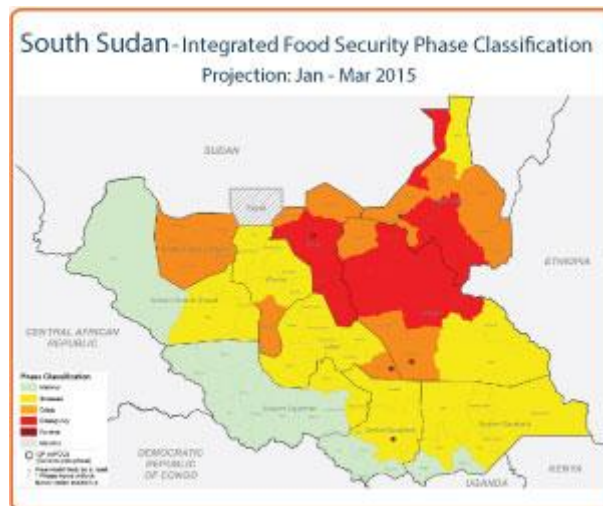
Civil insecurity severely affecting livestock movements in conflict-affected areas

The ongoing conflict is having a significant negative impact on the country's important livestock sector. The conflict has prompted an unprecedented movement of cattle from conflict-affected states to agricultural areas, outside of traditional



grazing areas, with consequent high concentration of animals on small grazing areas, destruction of crops and increasing risk of disease outbreaks. The increased competition for limited grazing resources poses also new challenges to local power structures, with intensification of tribal conflicts and cattle raids.

Abundant rainfall during the rainy season has generally improved availability and quality of pasture resources. Although rains stopped by mid-November, good pasture conditions are still reported in most grazing areas of the country, in particular in central and northeastern states. However, the latest available remote sensing images (second dekad of January) indicate a rapid deterioration of pasture in some southeastern areas of Pibor and Kapoeta East counties, along the borders with Ethiopia and Kenya.



Food security expected to deteriorate in conflict-affected areas due to early exhaustion of food stocks

According to the results of the latest available Integrated Phase Classification (IPC) analysis (September 2014), food security across the country has improved from August to December, following seasonal patterns. The estimated number of people in acute food insecurity and livelihood crisis declined from 3.9 million in July to nearly 1.5 million. The improvement was mainly due to the positive effect of humanitarian response and the availability of newly-harvested first and second season crops for local consumption, with ensuing declines in prices which had a positive effect on food access. Between January and March 2015, the estimated number of people in need of humanitarian assistance (classified as IPC phase 3 “Crisis” and 4 “Emergency”) is expected to scale up to 2.5 million as the below-average production harvested in conflict-affected areas allowed only a partial replenishment of household food stocks which are expected to run out by end-January, two-three months earlier than usual. Over 60 percent of the people in need of assistance are concentrated in the most conflict-affected states of Unity, Upper Nile and Jonglei.

Functionality of most food markets in conflict-affected areas has been seriously disrupted by direct attacks, looting, abandonment by traders, disruption of trading networks and loss of market infrastructure. In Greater Upper Nile, food prices are very high, up to ten times higher than pre-crisis levels in some areas, such as Bentiu and Rubkona.

Since the start of the conflict in mid-December 2013, close to 2 million people have fled their homes, including 1.5 million internally-displaced and about 497 000 now hosted in neighbouring countries as refugees.

Reference Date: 03-November-2014

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2014 crop production in most southern bi-modal rainfall areas
- Good yields expected in northern uni-modal rainfall areas, but reduced plantings in conflict-affected areas will lower cereal production
- Good pasture conditions across country
- High cereal prices in conflict-affected areas exacerbating precarious food security situation
- Significant improvements in food security outlook since August following harvests and humanitarian aid, but serious concerns remain for food security conditions in early 2015
- About 2.2 million people are currently considered as severely food insecure and in need of humanitarian assistance

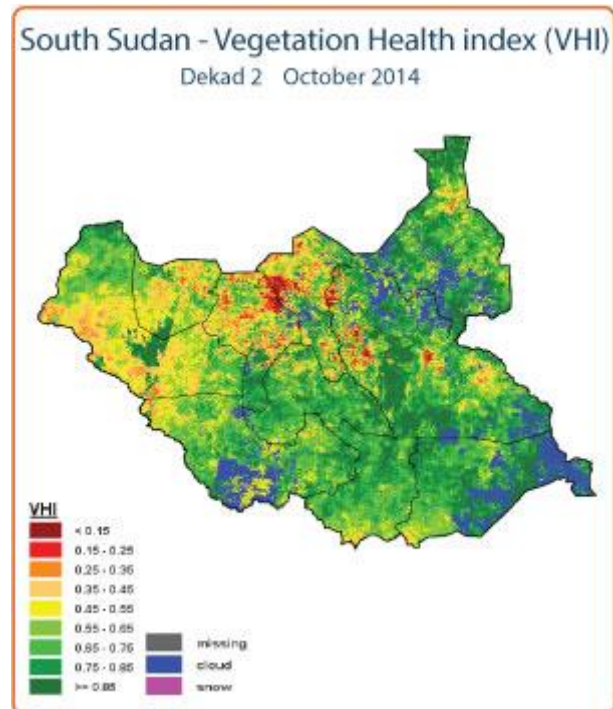
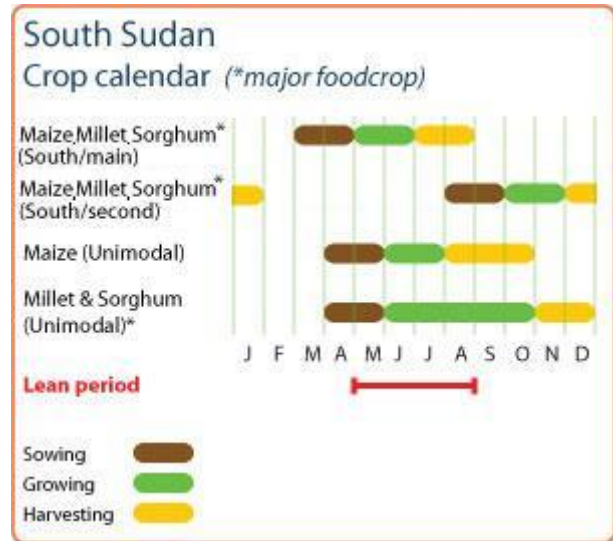
Favourable prospects for 2014 cereal production in most bi-modal rainfall areas

Harvesting of the 2014 first season crops has been completed in September in bi-modal rainfall areas of Greater Equatoria and production is estimated at average to above-average levels. Rains have generally been timely, abundant and well-distributed in most cropping areas of Western and Central Equatoria states, with some moderate water deficit levels in April in southeastern agro-pastoral areas of Greater Kapoeta in Eastern Equatoria State that affected crops development and pasture conditions.

Production prospects for the 2014 second season crops, to be harvested from early December, are generally favourable. According to satellite-based rainfall estimates, a significant water stress was reported in September in Lopa and Kapoeta North counties of Eastern Equatoria state and in Pibor county in Jonglei state, but abundant rains during the first two dekads of October, which caused also localized flooding in low-lying areas, have reversed the situation.

Below-average production expected in conflict-affected states due to significant reduction in area planted

In northern uni-modal rainfall areas, harvesting of 2014 short-cycle crops has been completed, while harvesting of long-cycle sorghum and millet crops is expected to continue until the end of the year. Yields are forecast at above-average levels following the favourable rainfall performance along the season. However, cereal production in most conflict-affected areas of Upper Nile, Unity and Jonglei States is expected at below-average levels due to a significant reduction in area planted. Some farmers were not able to plant due to displacement at planting time, while others planted plots smaller than usual, close to the homestead, due to insecurity, seed shortages and



increased time spent searching for food. About 40 percent of planting reduction is also reported in mechanized farming areas of Renk county in Upper Nile state.

Good pasture conditions across country

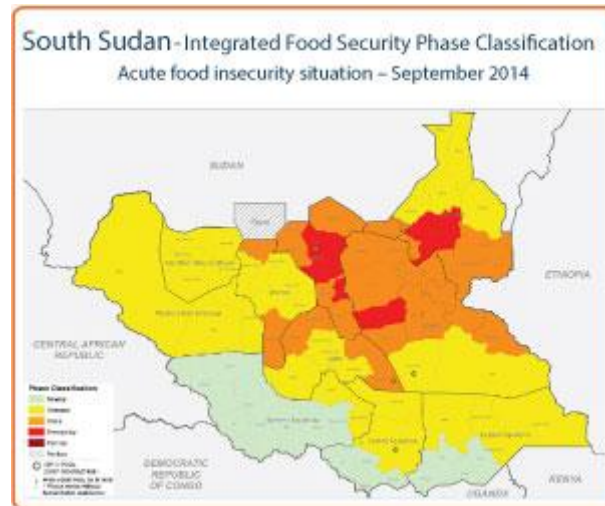
Abundant rainfall since the beginning of the rainy season has generally improved availability and quality of pasture resources. However, the latest available remote sensing images (second dekad of October) indicate a rapid deterioration of pasture in some northern and western areas of the country, particularly in Warrap and Unity states.

Significant improvements in food security due to recent harvests and humanitarian aid, but serious concerns remain for early 2015

According to the results of the latest Integrated Phase Classification (IPC) analysis (September 2014), food security across the country has begun improving in August and is expected to continue on a positive trend through December 2014, following seasonal patterns. The estimated number of people in acute food insecurity and livelihood crisis declined from 3.9 million in July to nearly 2.2 million. The improvement is mainly due to the positive effect of humanitarian response, the consumption of green maize in most uni-modal rainfall areas and the availability of first season crops in Greater Equatoria states, with ensuing declines in prices which had a positive effect on food access. For instance, according to FEWSNet, in Juba prices of sorghum declined by 17 percent between August and September, when they were 53 percent lower than 12 months earlier, due to increased domestic availabilities, imports from neighbouring countries and food aid distributions. Over 60 percent of the people in need are concentrated in most conflict-affected states of Unity, Upper Nile and Jonglei. At county level, the worst conditions are reported in Robkona, Guit, Kock and Leer (Unity), Bailet (Upper Nile) and Duk (Jonglei).

Until the end of the year, the number of people in need of humanitarian assistance is likely to further decline, up to 1.5 million, when the main season crops will be harvested. However, serious concerns remain for the beginning of 2015 as household food stocks are expected to be only partially replenished in some areas due to a below-average production, and most vulnerable households may have exhausted their coping mechanisms. In addition, there are concerns that the conflict may revamp at the end of the rainy season in November as roads conditions improve allowing better movements of people. Between January and March 2015, the number of people in need of humanitarian assistance is projected to scale up to 2.5 million.

Since the start of the conflict in mid-December 2013, close to 1.9 million people have fled their homes, including 1.4 million internally-displaced and about 470 000 now hosted in neighbouring countries as refugees.



Reference Date: 15-September-2014

FOOD SECURITY SNAPSHOT

- Mixed prospects for 2014 crop production reduced plantings in conflict-affected areas, while good rains boosting yield prospects in others
- High cereal prices in conflict-affected areas exacerbating precarious food security situation
- Despite a slight improvement in food security outlook following green harvests and humanitarian aid, serious concerns remain for food security in early 2015
- About 3.9 million people are considered as severely food insecure
- Scaling-up the humanitarian response is urgently needed to mitigate the humanitarian crisis

Mixed prospects for 2014 cereal production

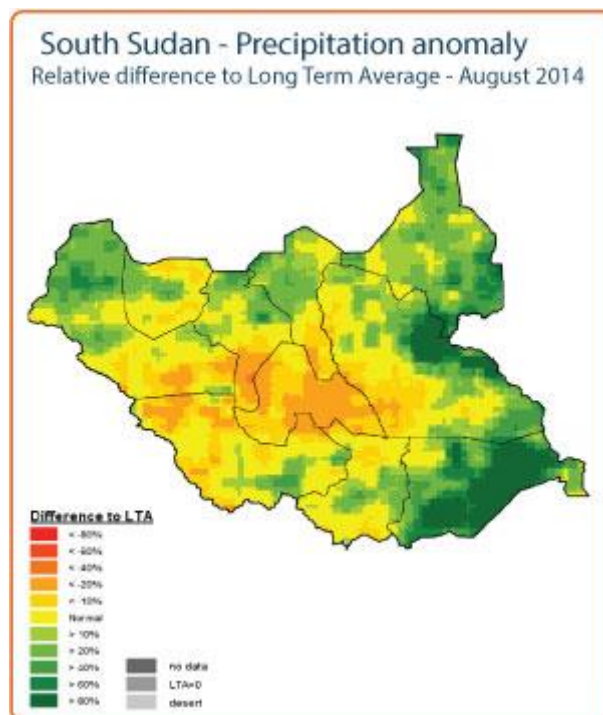
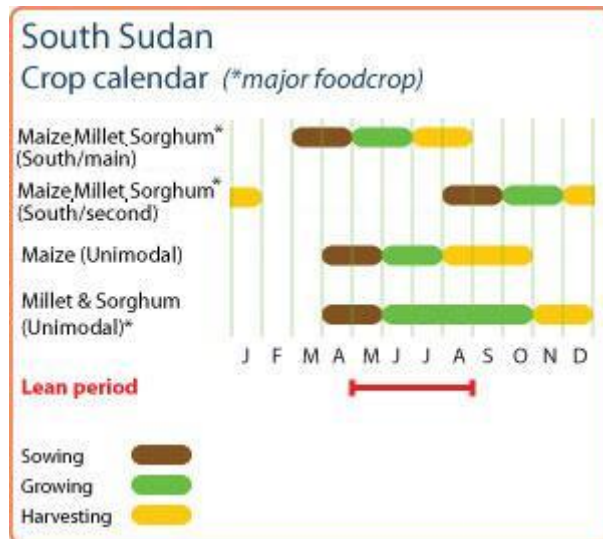
Harvesting of the 2014 first season crops is well advanced in most bi-modal rainfall areas of Greater Equatoria and production prospects are mixed. Rains have generally been timely, abundant and well-distributed in most cropping areas of Western and Central Equatoria states, with some moderate water deficit levels in April in southeastern agro-pastoral areas of Greater Kapoeta in Eastern Equatoria State that affected crops development and pasture conditions.

Planting of the 2014 second season crops, to be harvested from early December, is underway. Satellite-based rainfall estimates in August (see maps) show moderate water stress in some areas of Central and Western Equatoria states, Lakes, southern Warrap and southern Western Bahr el Ghazal. By contrast, abundant rains since mid-August in Greater Kapoeta have improved vegetation and pasture conditions, allowing livestock to return from dry season grazing areas. Since end-July, heavy rains caused localized flooding in low-lying areas of Jonglei and Upper Nile states.

Despite the favourable rainfall performance, planting activities in conflict-affected areas of Upper Nile, Unity and Jonglei States have been severely disrupted. Some farmers were not able to plant due to displacement at planting time, while others planted plots smaller than usual, close to the homestead, due to insecurity, seed shortages and increased time spent searching for food. On the other hand, in the bi-modal rainfall areas of Western and Central Equatoria States, planting of first season cereal crops was completed under normal circumstances with no discernible negative effects on timely access to farmland.

High cereal prices in conflict-affected states

In markets located in areas not affected by the conflict, prices of white sorghum increased in July in Wau and Aweil by about 10 and 15 percent, respectively, following normal seasonal patterns. In Juba, prices of sorghum continued the declining trend of recent months (-40 percent from January to July) as a



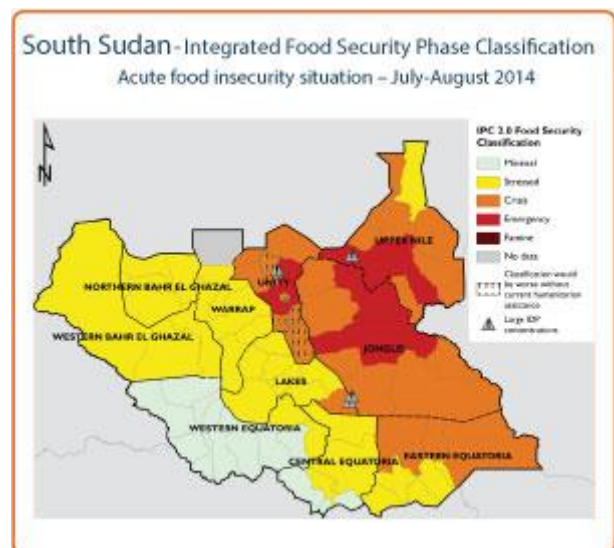
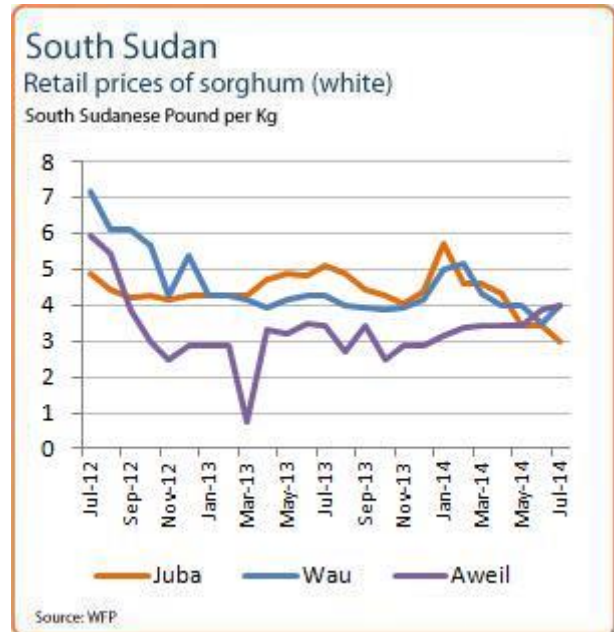
result from the availability of imports from neighbouring countries, remaining stocks of long cycle crops and food aid distributions. In Juba, prices of wheat and maize, mostly imported, were stable at around the same levels of July 2013. By contrast, in conflict-affected Unity, Upper Nile and Jonglei States, despite the recent start of the green harvest, civil insecurity and seasonal deterioration of road conditions continued to disrupt both domestic and cross-border trade leading to scarcity of staple food commodities and relatively high prices.

Food security improves in some areas due to green consumption and humanitarian assistance, but serious concerns remain for food security in early 2015

In May 2014, the Integrated Phase Classification (IPC) analysis estimated that about 3.9 million people (over 30 percent of the total population) were in acute food insecurity and livelihood crisis (IPC Phases 3, "Crisis" and 4, "Emergency"), more than double than one year before. About 2 million severely food insecure people are concentrated in the three most conflict-affected states of Upper Nile, Jonglei and Unity. The major factors driving the dramatic deterioration in food security conditions included large population displacements, disruption of local livelihoods and reduced income opportunities, losses of assets and food stocks, malfunctioning of markets leading to high food prices, exacerbated cattle rustling and difficulties to deliver humanitarian aid due to insecurity. Since the start of the conflict in mid-December 2013, over 1.75 million people have fled their homes including 1.3 million people internally-displaced and about 450 000 people that are now hosted in neighbouring countries as refugees.

As the green harvest of maize and sorghum started in August in most cropping areas, ending the lean season, food availability and access is generally improving. The updated July/August IPC has concluded that food assistance programmes have mitigated food security conditions, from Emergency (Phase 4) to Crisis (Phase 3) level, in some counties of Unity state (Rubkona, Leer, Panyijiar and part of Mayedit) as well as in major IDP concentrations. Although a full revision of the IPC analysis has been carried out at the beginning of September and its results are expected to be soon released, the expected reduced harvest in some areas, the significant disruptions of trade flows and market activities and the exhaustion of coping mechanisms by most vulnerable households raise serious concerns for food security conditions in early 2015.

Humanitarian access is limited by unstable security conditions and check points with limited coverage by NGOs. The delivery of humanitarian assistance is also very expensive due to impassable roads during the rainy season and increasing reliance on air-lifting/dropping, including for emergency livelihood kits (crop seeds, vegetable seeds, fishing gear and veterinary kits). In addition, humanitarian assistance capacity is limited by the number of aircrafts and barges against competing needs by different humanitarian actors.



GIEWS Country Brief

South Sudan



Reference Date: 04-June-2014

FOOD SECURITY SNAPSHOT

- The rainy season started favourably, but crop prospects in conflict-affected areas are uncertain following displacements and loss of assets
- The food security outlook expected to deteriorate until August, especially in conflict-affected states
- About 3.5 million people are severely food insecure and in need of urgent humanitarian assistance
- Protecting crop production capacity in less affected areas is vital to country food security in 2015
- Scaling-up the humanitarian response is urgently needed to mitigate the humanitarian crisis

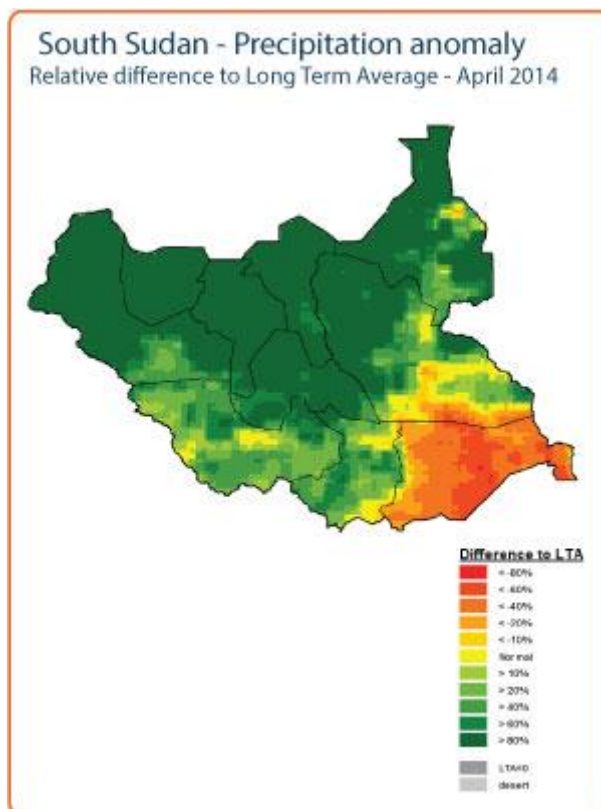
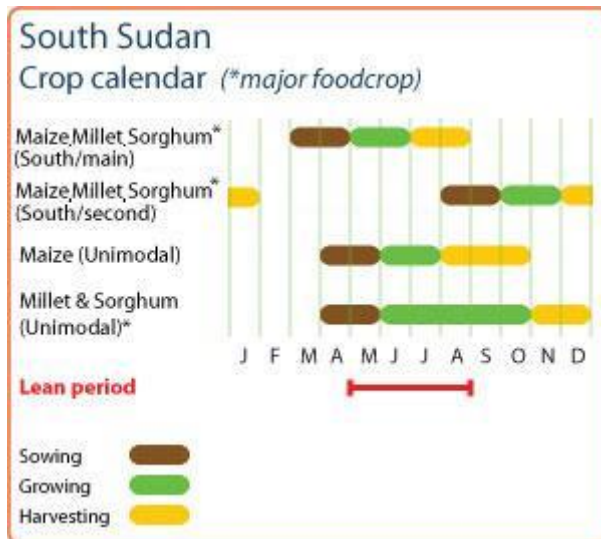
Favourable seasonal rains were received so far, but conflict and displacement are expected to negatively impact on 2014 cereal production in parts

The 2014 first rainy season (March-July) started on time at the beginning of March, favouring land preparation and planting activities of the first season crops in the uni-modal rainfall areas of the Greenbelt in Central and Western Equatoria.

Satellite-based precipitation estimates and vegetation analysis (see figures) indicate that in most cropping areas, rainfall amounts received so far were well above average in most cropping areas of the country, allowing for favourable planting conditions in uni-modal rainfall areas. By contrast, significant moisture deficits were observed in the southeast, in most agro-pastoral areas of Eastern Equatoria State (especially in Greater Kapoeta) and part of southern Jonglei state (Bor and Pibor Counties), with negative effects on vegetation and pasture conditions which may delay planting activities and hamper normal livestock movements from dry season grazing areas.

Despite the good rainfall performance, conflict-affected areas of Upper Nile, Unity and Jonglei States are faced with serious difficulties as planting and cultivation activities have been severely disrupted. Some planting activities are reported where farmers have minimum security, but overall significant reduction in planted areas is expected. However, in the bi-modal rainfall areas of Western and Central Equatoria States, an FAO assessment carried out in April 2014, indicated that planting of first season cereal crops, for harvest in August and September, was completed under normal circumstances with no discernible negative effects on timely access to farmland. Currently, a similar crop planting assessment is ongoing in the Greater Bahr El Ghazal region to monitor the overall grain production in this critical season.

The number of severely food insecure people expected to increase until August

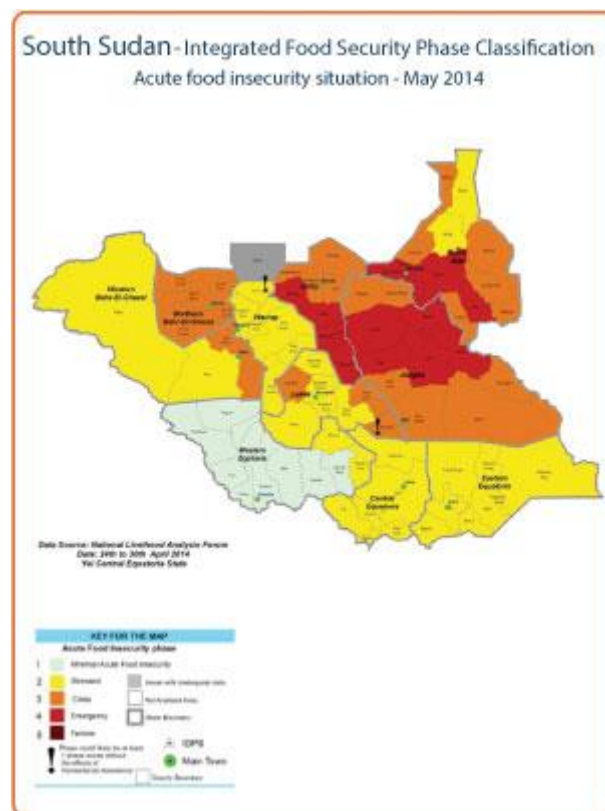
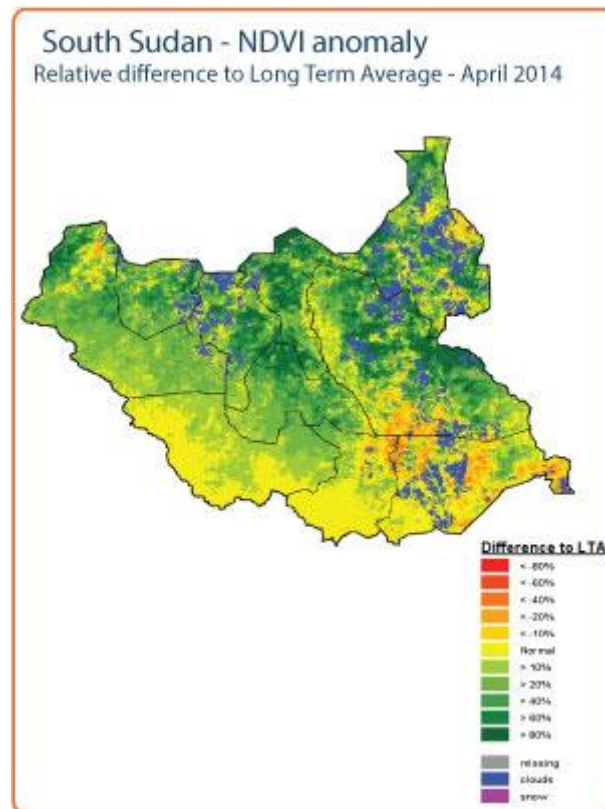


According to the latest Integrated Phase Classification (IPC) analysis (May 2014), about 3.5 million people (over 30 percent of the total population) are considered in acute food insecurity and livelihood crisis (IPC Phases 3, "Crisis" and 4, "Emergency"), more than double than one year before. About 2 million severely food insecure people are concentrated in the three most conflict-affected states of Upper Nile, Jonglei and Unity, where between 50 and 85 percent of the population is in need of urgent action to protect and save lives and livelihoods. The major factors driving the dramatic deterioration in food security conditions include large population displacements, disruption of local livelihoods and reduced income opportunities, losses of assets and food stocks, malfunctioning of markets leading to high food prices, exacerbated cattle rustling and difficulties to deliver humanitarian aid due to insecurity. Since the start of the conflict in mid-December 2013, over 1.3 million people have fled their homes including 1 million people internally displaced and about 350 000 people that are now hosted in neighbouring countries as refugees.

Between June and August, as the lean season deepens, food security conditions are expected to further deteriorate, especially in the three most conflict-affected states and the number of people in crisis or emergency food insecurity levels is expected to increase by about 10 percent, up to 4 million. In August, the onset of the green harvests of maize and sorghum, even with likely reduced planted area, will be crucial to prevent that most vulnerable households in the emergency phase would face famine-like conditions.

The timing and scale of the humanitarian response will be crucial in order to prevent that the South Sudan crisis deteriorates into a catastrophe by the end of the year. On 20 May the international donor community met in Oslo, Norway and pledged over USD 600 million in new funding for South Sudan to be added to previous estimated requirements for aid operations in 2014 of about USD 1.8 billion. By 23 May about USD 589 have been raised.

Humanitarian access is limited by unstable security conditions and check points with limited coverage by NGOs. The delivery of humanitarian assistance is also becoming very expensive due to impassable roads due to heavy rains and increasing reliance on air lifting/dropping, including for emergency livelihood kits (crop seeds, vegetable seeds, fishing gear and veterinary kits). In addition, humanitarian assistance capacity is limited by the number of aircrafts and barges against competing needs by different humanitarian actors.



Reference Date: 06-February-2014

FOOD SECURITY SNAPSHOT

- Despite an improved 2013 cereal production, the recent conflict increased food insecurity in parts
- Serious concerns over the upcoming 2014 cropping season
- Cereal prices declined seasonally in late 2013 but will likely increase in coming months due to conflict-related market disruptions
- The food security situation seriously deteriorated due to the recent conflict

Despite an improved 2013 cereal production, the recent conflict reduced food availability in parts

Harvesting of the second season 2013 cereal crops has been recently completed in the bimodal rainfall areas of Greater Equatoria (Western, Central and Eastern Equatoria states) in the south of the country, while, in the unimodal rainfall areas, harvesting operations were concluded in December.

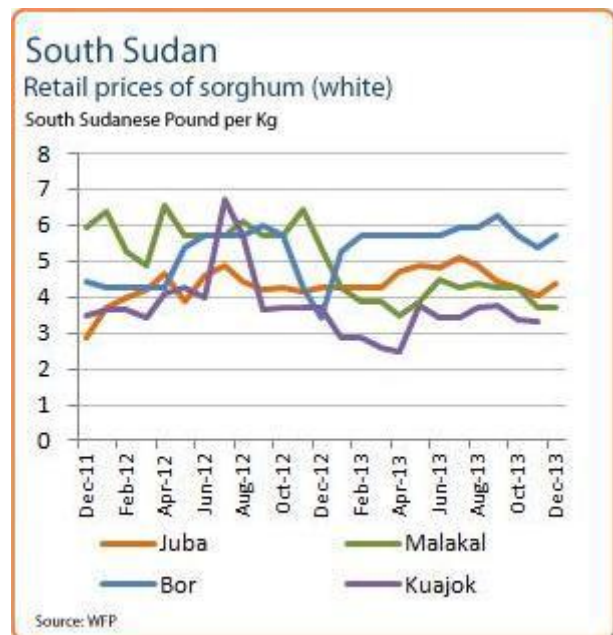
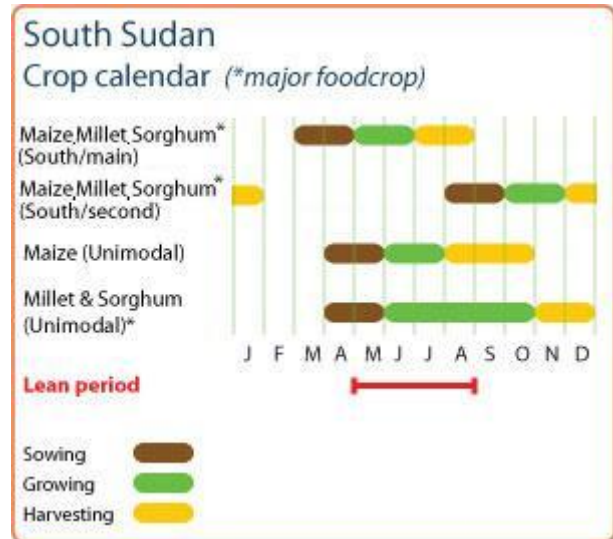
Above average and well distributed rainfall was received during the cropping period; this, coupled with the absence of pests and diseases, had a positive effect on cultivated area and yields. As a result, according to the a joint FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) which visited the country in November 2013, the 2013 cereal production in the traditional sector was put at about 892 000 tonnes, 13 percent up on 2012 and 22 percent above the average of the previous five years.

On 15 December 2013, armed hostilities erupted in Juba and quickly spread throughout the country, seriously affecting six out of ten states. The conflict started at the end of the cropping season with only the late harvests remaining in the fields. However, due to the widespread displacement, a large number of households lost their stocks, with a negative impact on food availability in conflict affected areas.

Concerns over the upcoming 2014 cropping season

The next planting season will begin from March/April 2014. The recent conflict which caused massive displacement of people has already resulted in input shortages and depleted households' productive assets that already were inadequate. In addition, the prevailing insecurity is expected to exacerbate the already poor plant protection services leading to increased incidences of pests and diseases, while post-harvest losses are expected to be significant.

Timely and effective support to the agriculture sector (crops, livestock, fisheries, etc.) is essential to mitigate the possible significant decline in agricultural production.



The seasonal decline of cereal prices recorded in late 2013 is expected to be short lived due to conflict-related market disruptions

Prices of locally produced sorghum, the main staple, seasonally declined in most markets in recent months as the newly harvested crops increased supplies. From August to November, retail prices of sorghum decreased by between 10 and 23 percent in Juba, Bor, Malakal, Bentiu, and Kuajok markets. By contrast, sorghum prices showed a marked variation in Aweil in Northern Bahr el Ghazal State and Rumbek in Lakes State due to marketing disruptions caused by floods in September. In the first two weeks of December prices increased following normal seasonal patterns in some markets but before the conflict erupted, sorghum prices were below or around their levels of 12 months earlier in most monitored markets. Data and information on market prices are not yet available for the last several weeks but are generally expected to increase in different parts of the country due to market disruptions and uncertainty negatively impacting on access to food, especially on vulnerable and market dependent households. In addition, the main conflict affected areas (Bor, Rumbek, Bentiu) were already experiencing higher cereal prices than in the rest of the country before the violence erupted.

The food security situation seriously deteriorated due to the recent conflict

The civil conflict has resulted in massive and widespread displacements: in late January 2014 the IDP caseload was estimated at 870 000 individuals, including the households who fled the country, with Unity, Jonglei and Upper Nile States accounting for more than 50 percent of the total. Following the forced abandonment of crucial livelihood assets and market disruptions, food availability and access have become very difficult for the affected population, and the food security situation has seriously deteriorated.

According to the latest Integrated Phase Classification (IPC) analysis, the number of people in acute food insecurity and livelihood crisis (IPC Phases 3, "Crisis" and 4, "Emergency") was estimated in late January 2014 at about 3.7 million, almost four times the pre-crisis estimate of 1 million individuals. The areas most affected by food insecurity are Unity, Jonglei and Upper Nile States.

In response, WFP has planned to provide food assistance to 419 000 IDPs, while FAO will perform response emergency interventions for the distribution of time critical inputs aimed at increasing food production and protecting livelihoods. In particular, FAO appeals for USD 77 million to support 3.2 million beneficiaries, mainly through the distribution of Emergency Livelihood Kits (seeds and tools, fishing equipment, urban gardening inputs, animal health kits), the implementation of a voucher system for improved access to nutritious food sources (milk and fish), and livestock vaccination and treatment campaigns in at risk areas.

Reference Date: 27-November-2013

FOOD SECURITY SNAPSHOT

- A satisfactory overall 2013 cereal harvest expected, with mixed outcomes at State level
- Cereal prices seasonally declining in most markets
- Food security situation expected to improve in coming months, with the exception of conflict affected areas

A satisfactory overall 2013 cereal harvest expected, with mixed outcomes at State level

Harvesting operations are underway both in bimodal rainfall areas of Greater Equatoria (Western, Central and Eastern Equatoria states), where the second season cereal crop is being gathered, and in unimodal rainfall areas.

In bimodal rainfall areas, especially in the greenbelt of Greater Equatoria, production of coarse grains is forecast at above average levels, while lower yields are expected in lowlands of Warrap, Unity, Upper Nile and Northern Bahr el Ghazal States due to erratic rains, insecurity and seasonal floods in September/early October. Very low production is expected in the disputed area of Abyei, as farmers, for the second consecutive year, were unable to plant due to insecurity.

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) together with the Ministry of Agriculture is fielded from late-October 2013 and field work has just been concluded. An updated crop production estimate and overall food security situation will be issued soon.

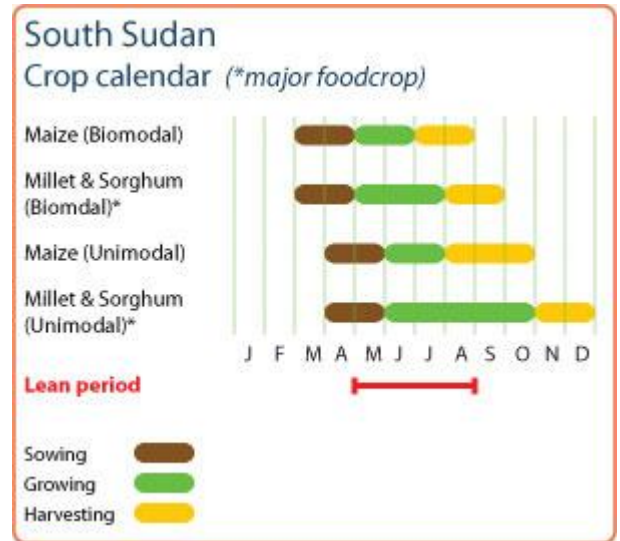
Cereal prices seasonally declining in most markets

Prices of locally produced sorghum, the main staple, seasonally declined in most markets in recent months as the newly harvested crops increased supplies. From August to November, retail prices of sorghum decreased by between 10 and 23 percent in Juba, Bor, Malakal, Bentiu, and Gogrial markets, while they remained firm in Aweil (Northern Bahr el Ghazal State) and Rumbek markets (Lakes State), where crop production was negatively affected by insecurity and erratic rains. November prices were below or around their levels of 12 months earlier in most monitored markets.

In the capital Juba, prices of maize, mostly imported, declined by 17 percent between August and November. The decline in maize prices occurred despite increasing prices in Uganda, the country's main supplier, as a result of the increased availabilities of locally produced sorghum.

Food security situation expected to improve in coming months, with the exception of conflict affected areas

Countrywide, as of mid-2013, about 1.2 million people were estimated to be severely food insecure, while additional 3.5 million people were considered moderately food insecure. The overall food security



situation is expected to improve as the bulk of the new harvest will replenish household stocks. However, limited improvements are expected in parts of Jonglei (especially in Pibor county), and in the Abyei disputed area, where civil insecurity severely disrupted agricultural activities and caused massive displacement. Food security improvements are expected to be limited and short-lived also in parts of Jonglei, Unity, Lakes and Warrap States, affected by floods.

As of late November 2013, the total number of refugees from conflict-affected areas of South Kordofan and Blue Nile states in Sudan which are hosted in Unity and Upper Nile states is approximately 200 000 individuals, posing an increasing demand on hosting communities for food, water and health services.

Reference Date: 03-June-2013

FOOD SECURITY SNAPSHOT

- Planting of 2013 cereal crops is concluded in southern area, while it is ongoing in northern areas
- Reduced planted area expected in most conflict-affected areas
- Timely onset and good amounts of seasonal rains favouring crops and pasture
- Prices of sorghum, the main food staple, on the rise in most markets
- About 1.2 million people are estimated to be severely food insecure until next harvest starts in August/September

Abundant rains favour the establishment of 2013 cereal crops

In southern Greenbelt and Greater Equatoria states, the March-to-May rains were generally favourable with a timely onset and abundant amounts received in most cropping areas, favouring planting and crop development. In particular, well above average rains during the month of May have increased soil moisture surpluses in most south-western areas of the country with positive effects on crop yields and availability of grazing resources. As pastures are being regenerated, livestock are gradually trekking back from dry season grazing areas. In northern areas of the country, seasonal rains started with a slight delay of one-two dekads in mid-May and planting of crops, to be harvested during the last quarter of the year, is underway.

Civil insecurity hampers planting operations

In areas affected by the prevailing civil insecurity due to conflict and inter-tribal clashes, such as parts of Jonglei, Unity, Warrap and Lakes states, access to land is often limited and although official estimates are not available, planted area is expected to decline.

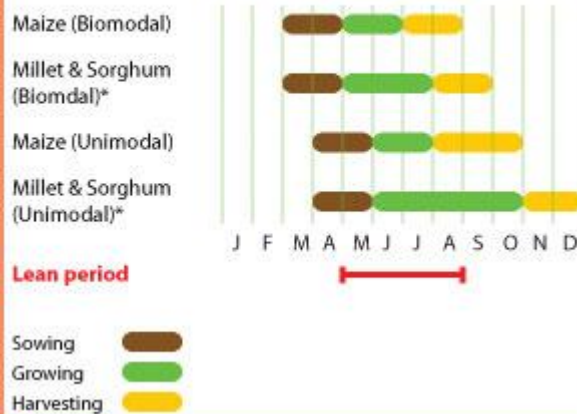
Sorghum prices increasing seasonally in most markets

Prices of locally produced cereal crops are increasing in most markets as the lean season progresses and household food stocks begin to dwindle. From January to April, retail prices of the main staple sorghum increased in Bor and Aweil by 15 and 12 percent, respectively, following seasonal patterns, while they were mostly stable in the capital Juba. By contrast, over the same period, sorghum prices decreased in Malakal by 18 percent due to increased informal imports from neighbouring Sudan.

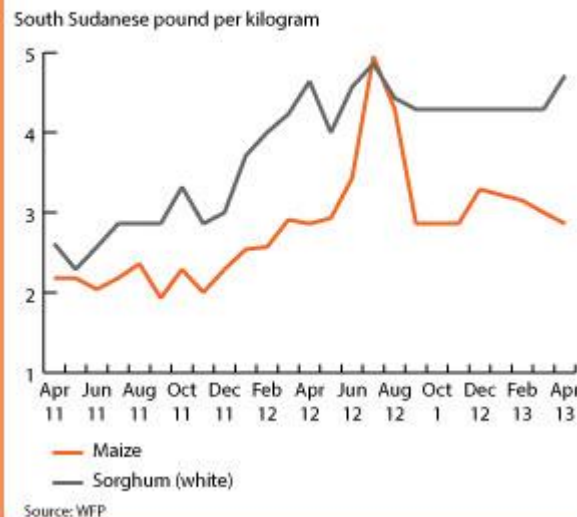
Since the beginning of the year, prices of maize decreased by 11 percent in Juba, mainly due to the availability of imports from Uganda and Tanzania. Prices are expected to increase further in the coming months as the lean season progresses and most roads, especially in remote areas, become impassable during the rainy season thus disrupting market supplies.

Improved food security in parts, but food emergency remains, especially among IDPs and

South Sudan Crop calendar (*major foodcrop)



South Sudan Retail prices of cereals in Juba



flood affected areas

Countrywide, until the start of the next harvest in August/September, about 1.2 million people are estimated to be severely food insecure, while additional 3.5 million people are considered moderately food insecure. Higher levels of food insecurity are reported in parts of Jonglei (especially Pibor county), Unity, Lakes, Warrap states and the Abyei disputed area. These areas are characterized by intensive inter-communal clashes (mostly related to cattle raiding) and persistent civil insecurity. Most of the areas (including the eastern flood plains of Upper Nile state) had also a below average crop production in 2012 due to widespread flooding which caused an earlier than normal exhaustion of food stocks (in April instead of May). The overall food security situation is expected to improve beginning from August as early maturing sorghum and green maize become available for consumption.

The recent signing of the Implementation Matrix agreement between the Sudan and South Sudan is also expected to improve the overall food security situation, although its effects may not be immediate. The resumption of oil production and its export via Sudan is expected to improve the country's financial position and reduce the inflationary pressure. At the same time, the decision to open ten cross-border points is also expected to facilitate formal and informal trade, with positive effects on food availability in markets along the border.

As of early April 2013, the total number of refugees from conflict-affected areas of South Kordofan and Blue Nile states in Sudan which are hosted in Unity and Upper Nile states is approximately 189 000 people, about 20 000 people more than three months earlier, posing an increasing demand on hosting communities for food, water and health services.

Reference Date: 14-February-2013

FOOD SECURITY SNAPSHOT

- 2012 cereal production estimated at above average levels
- Prices of sorghum and maize, the main food staples, continue to decline in most markets
- About 2.9 million people are estimated to be in need of emergency food assistance in 2013

Good production estimates for 2012 cereal crops

Harvesting of the 2012 first-season cereal crops is complete. Net cereal production, sorghum and maize, from the traditional small-holder sector is estimated at about 761 000 tonnes, about 35 percent above the 2011 estimates and about 6 percent above the average of the previous five years. Planted area has increased in all states, except in Jonglei where more than 315 000 people have been displaced either by floods or by conflict with negative impact on planted area.

Cereal production from the mechanized sector in Upper Nile, Unity and Northern Bahr el Ghazal states is put at an average level of about 114 000 tonnes.

Sorghum and maize prices continue to decline

Prices of locally produced maize and sorghum have declined in most markets since August/September 2012 following increased supplies of newly harvested crops for markets and households' own consumption. In main markets, between July and December 2012, sorghum prices decreased between 6 and 40 percent, while prices of maize decreased between 4 and 72 percent over the same period. The sharpest declines were recorded in Rumbek and in Aweil markets, while they were less significant in the capital Juba.

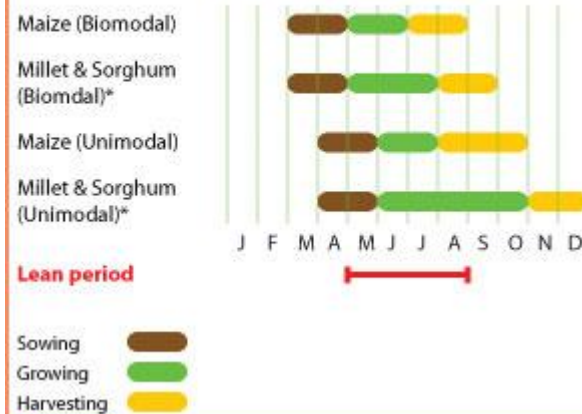
However, cereal prices were still higher than one year earlier, especially in flood-affected areas. Livestock prices, particularly of small ruminants, have risen during the second half of 2012 which, coupled with declining cereal prices, have substantially improved the terms-of-trade for pastoralists and consequently their purchasing power.

Improved food security in parts, but food emergency remains, especially among IDPs and flood affected areas

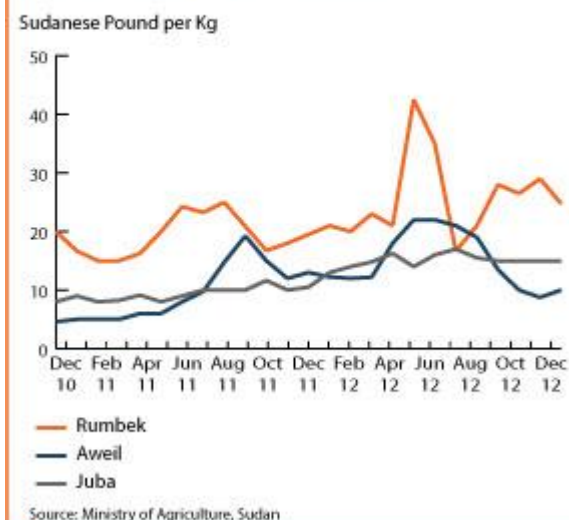
The supply of newly harvested crops has generally improved household food security. However, higher levels of food insecurity are reported in parts of Jonglei, Unity, Warrap, Northern Bahr el Ghazal and Eastern Equatoria States that were affected by floods and/or persistent civil insecurity (mostly inter-communal clashes related to cattle raiding) that hampered crop cultivation activities and the delivery of humanitarian assistance. In particular, IDPs in Pibor County in Jonglei State and in Abyei disputed areas are facing crisis levels (IPC phase 3) of food insecurity.

In 2013, food assistance requirements were estimated for about 2.86 million people, mainly vulnerable people such as under-five children and mothers, children attending schools, returnees, refugees and IDPs.

South Sudan Crop calendar (*major foodcrop)



South Sudan Retail prices of sorghum (white)



However, in a scenario where a significant increase is registered in the number of IDPs, returnees (with the referendum scheduled for October 2013) and refugees, the total number of people in need of food assistance may reach about 4 million.

As of early January 2013, the total number of refugee from conflict-affected areas of South Kordofan and Blue Nile states in Sudan which are hosted in Unity and Upper Nile states is approximately 170 500 people posing an increasing demand on hosting communities for food, water and health services.

Reference Date: 26-July-2012

FOOD SECURITY SNAPSHOT

- Crops and pasture benefit from favourable rainfall
- Prices of sorghum and maize, the main food staples, remain at record high levels
- About 2.4 million people, more than double the estimates in end of 2011, are in need emergency assistance

Favourable outlook for crops and pasture

Harvesting of the 2012 first-season cereal crops is about to start in August in bi-modal rainfall areas of Greater Equatoria (Western, Central and Eastern Equatoria states), while in uni-modal rainfall areas crops are still at vegetative stage and harvest is expected to start at the end of October. Seasonal rains generally started on-time in the second half of April, with some delay of about two-three weeks in Eastern Equatoria and southern Jonglei states as well as in some cropping areas along the border with Sudan. So far, despite erratic distribution in some areas of Central Equatoria and Lakes states, rainfall amounts have been average to above average in most agricultural and pastoral areas. According to satellite based monitoring, the vegetation index (NDVI) of early July 2012 indicates that crop and pasture conditions are good and generally better than the long term average. The latest forecast for the 2012 June-to-August rainy season by the IGAD Climate Prediction and Application Center (ICPAC) indicates that rains are expected to be abundant during the remainder of the season, with increased likelihood of floods, especially in flood-prone lowlands of Upper Nile and Unity states. Extreme wet conditions are also likely to trigger outbreaks of several livestock diseases.

Sorghum and maize prices at record levels across the country

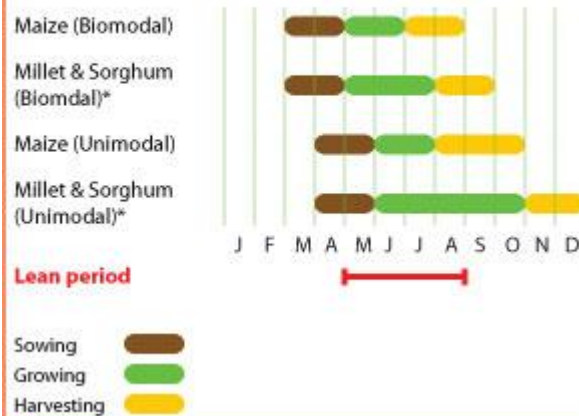
Since mid-2011, prices of domestically produced cereals have registered an increasing trend in most markets, reaching record prices in June/July 2012. In July 2012, both sorghum and maize were traded in Juba retail markets at a record price of about SSP 5/kg, with an increase of between 180 and 220 percent year on year. However, in main retail markets in the north of the country sorghum was 18-24 percent more expensive than in Juba, with a peak of 47 percent more in Wau in Western Bahr el Ghazal state. Wheat flour, mainly imported, reached a record price of SSP 8.5/kg in June 2012 and slightly decreased in July 2012.

Food security conditions deteriorate as the lean season peaks

As this year's lean season has started earlier than usual, following the 2011 poor harvest, the estimated number of people in need of humanitarian assistance has been increased from one million at the end of 2011 to 2.4 million people. Major areas of concern are those bordering the Sudan in Northern Bahr el Gazal, Warrap, Unity, Upper Nile and Jonglei states. The higher levels of food insecurity follow a series of factors including escalation of civil insecurity, inter-communal clashes (mostly related to cattle raiding), diminished cross border trade with the Sudan, increasing number of IDPs, returnees and refugees,

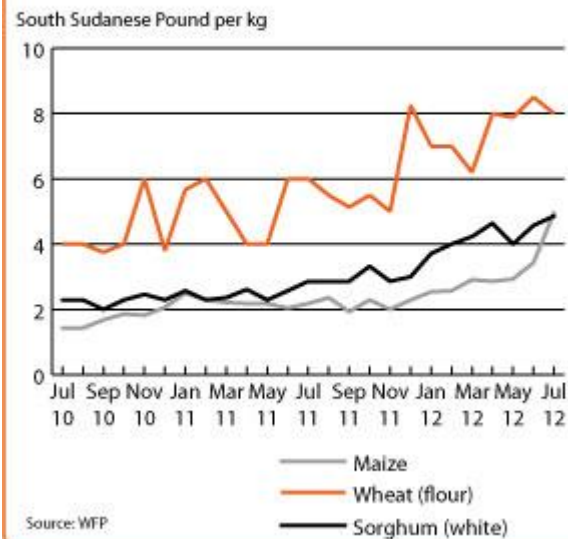
South Sudan

Crop calendar (*major foodcrop)



South Sudan

Retail prices of cereals in Juba



fuel scarcity and high food prices. In addition, road access to several rural areas is usually reduced with the onset of the rainy season. Access to conflict-displaced communities in Northern Bar el Ghazal is already limited hampering the delivery of humanitarian assistance, necessitating on-time pre-positioning of supplies.

In May and June 2012, the influx of refugees from conflict-affected areas of South Kordofan and Blue Nile states in Sudan has significantly increased, bringing the total refugee population in sites in Unity and Upper Nile states to approximately 178 000 people posing an increasing demand on hosting communities for food, water and health services.

Reference Date: 28-March-2012

FOOD SECURITY SNAPSHOT

- Prolonged dry spell resulted in reduced cereal production in 2011
- Prices of sorghum and maize, the main food staple, are at record high levels
- One million people are estimated to be in need emergency assistance
- Increased conflict, civil insecurity and economic problems are expected to increase the emergency requirements

Favourable rainfall forecast for first season crops in bi-modal areas

Planting of the 2012 cereal crops is about to start in bimodal rainfall areas of Greater Equatoria (Western, Central and Eastern Equatoria), while land preparation is underway in unimodal rainfall areas where planting is expected to start from May/June. According to the latest forecast for the 2012 March-to-May rainy season by the IGAD Climate Prediction and Application Center (ICPAC), there is an increased likelihood of normal to above normal rainfall that is expected to have a positive impact on first season crops to be harvested in August in Greater Equatoria. Favourable rains are also expected to improve pasture and water availability for livestock.

Poor cereal production in 2011

Harvesting of the 2011 cereal crops was completed late last year and production is estimated at about 563 000 tonnes, 19 percent below 2010 output and 25 percent below last five year average. Erratic rains coupled with civil insecurity, armed cattle rustling, inter and intra-communal conflicts and activities of militia groups that inhibited farmers from expanding their cultivated area, significantly affected overall agricultural performance.

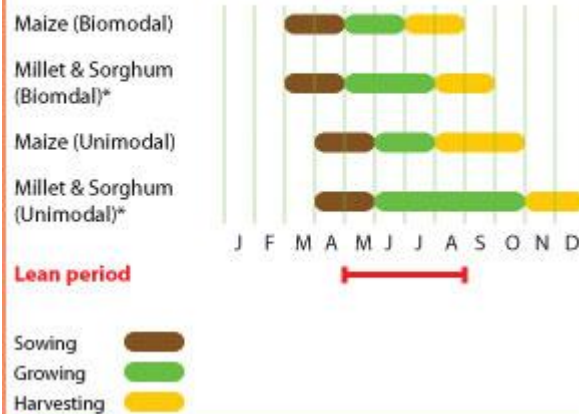
Cereal import requirements for 2011/12 marketing year (July/June) are forecast at about 474 000 tonnes to be covered through commercial imports and food aid. Since mid-2011, trade restrictions between South Sudan and the Sudan have severely constrained trade opportunities and led to a reduction in market supplies, particularly in areas close to the northern border. The decision to shut down the oil pipeline will severely affect Government's revenue and spending, including domestic capacity to import food and fuel. The recent flare up of conflict between South Sudan and the Sudan is expected to exacerbate food insecurity.

Food imports from Uganda, Kenya and Ethiopia have increased in recent months, but the poor road network and high transportation costs have added to the prevailing high food prices.

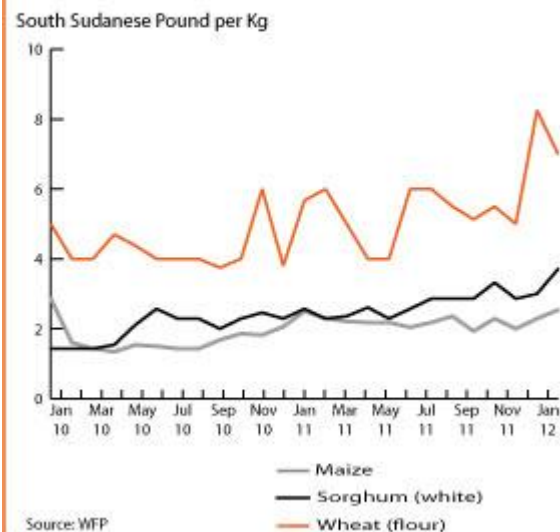
Record prices for sorghum and maize

Prices of food continue to increase since mid-2011 with the exception of a brief decline late last year, following new supplies from the then harvested crops. Prices of domestically produced cereals have started to climb again from December 2011. For instance, in January 2012,

South Sudan Crop calendar (*major foodcrop)



South Sudan Retail prices of cereals in Juba



sorghum was traded in Juba retail markets at a record price level of SSP 3.71/kg, with an increase of about 44 percent year on year. Wheat flour, mainly imported, reached a record price of SSP 8.25/kg in December 2011 and remained high at SSP 7.00/kg in January 2012.

Deterioration in food security conditions

As a result of declining food stocks, reduced trade flows with the Sudan and rising prices, food security conditions have gradually deteriorated during the first quarter of 2012. In particular, price increases have affected markets bordering the Sudan in Northern Bahr el Gazal, Warrap, Unity and Upper Nile states which heavily depend on imported grains. Severe macroeconomic shocks are expected from the recent closure of oil production. This in turn will result in depreciation of the South Sudan currency, increased inflation and the reduction of the Government's capacity to respond to the food security emergency.

Civil insecurity continues to affect food access, especially in Jonglei state. At the end of 2011, an estimated one million people were severely food insecure and this number is expected to increase to between 2.5 million and 3 million in the coming months as the lean season is expected to start earlier than usual. Since October 2010, about 370 000 people have returned to South Sudan from the Sudan and the flux of returnees is expected to increase after the expiry, on 8 April 2012, of the nine-month moratorium (about 700 000 South Sudanese are still living in the Sudan). In Unity, Upper Nile, Warrap and Jonglei states, humanitarian assistance continues to be provided to IDPs and refugees from Abyei area and from South Kordofan and Blue Nile states in the Sudan. The flare up of conflict between South Sudan and the Sudan in late March is expected to increase to the number of refugees and IDPs.