

SUDAN FOOD SECURITY & EARLY WARNING UPDATE



Food Security Technical Secretariat (FSTS) – Ministry of Agriculture (MoA)

November 2010 - January 2011

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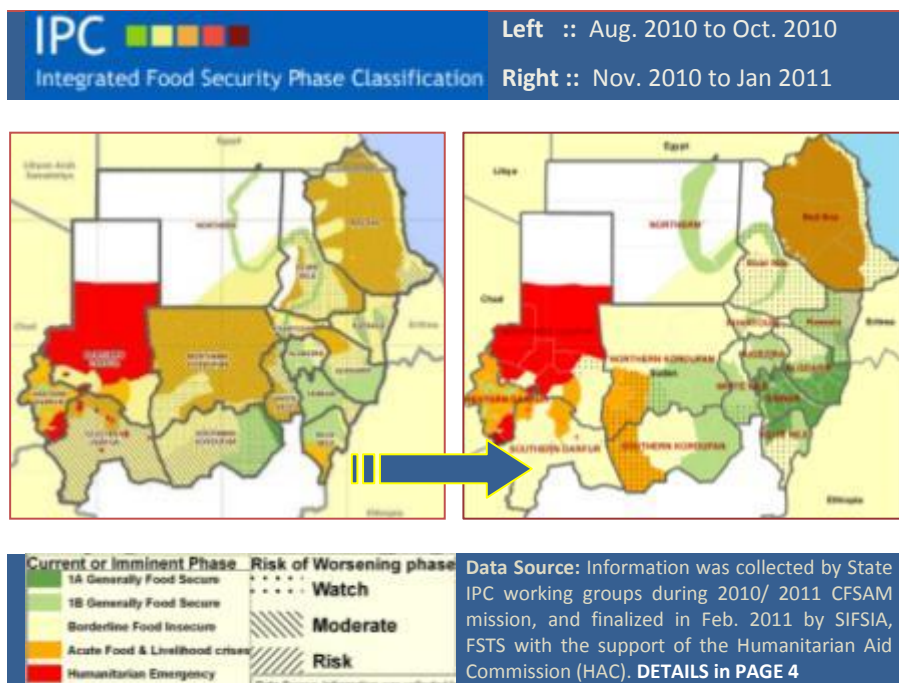
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Food Security outlook:

As the lean period of May to September 2011 approaches, high food prices will most likely constrain the purchasing power of poor households. This may cause an earlier depletion of food stocks and could cause households to slip into food insecurity.

The overall Food security situation during the updated period has improved due to favorable agro-climatic condition during the main cropping season (June – September 2010).

Moderate food insecurity conditions continued over areas where instability have negatively impacted on food production, including western parts of South and North Kordofan, Abyie and South Darfur state. Localized cases of chronic vulnerability have been identified in greater Darfur and Red sea states.



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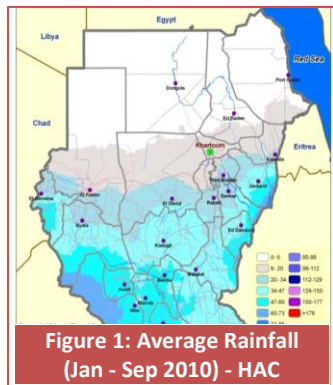
This Food Security Update is designed to better inform decision makers and analysts in Sudan of current food security situations and future outlooks. **FSTS** in collaboration with the Humanitarian Aid Commission (HAC) started to produce monthly food security update since September 2010. The **FSTS** is represented by more than 10 core line-ministries and data sources for reports are coming from the available data collection system of these various line ministries.



CFSAM Summary 2010/ 2011¹

Agro climatic condition in 2010/2011

Rainfall in 2010 was reasonably early, above normal and well-distributed during the season in all states with few extreme events. Although



Wheat and rice deficits remain within the usual annual norm requiring imports of some 1.5 million MT and 50 000 tonnes, respectively.

By the end of November 2010, wholesale market prices of sorghum dropped to 55-60 SDG/ 90 kg in the main production zones, below the selem price (70 SDG/ 90 kg) with farm gates prices noted to be below production price estimates (48.5 SDG/ 90kg) in White Nile (Kosti).

This year, the selem price was set at an equivalent of 257 \$ / tonne (70 SDG/ quintal sack) but, at the time of the CFSAM in areas where the harvest was well underway, the wholesale market for *feterita* sorghum had already dropped to 180- 200 US\$ / tonne (50-55 SDG/ quintal sack).



Sudan Cereal Balance 2010/ 2011 (000 MT)

The projected cereal supply/demand balance by CFSAM for the 2010/11 marketing year in the 15 northern states of the Sudan is summarized in the table below. It shows a cereal production estimate of 5.773 million tonnes which includes a conservative forecast of 433,000 tonnes for wheat production from the expected harvest in March- April 2011 to which a further 25 000 tonnes of rice and 42 000 of maize have been added to account for uncertain levels of domestic production.

Opening stocks of cereals for marketing year 2010/11 are estimated at 310 000 tonnes, comprising: 200 000 tonnes of wheat, held by the main importing companies and flour mills plus sorghum and millet stocks, usually held by traders amounted to 312,000 tonnes at the end of 2009; however, this year, the amount is lower after last year's recognised sorghum deficit in Gedarif private and Governmental

stock reported to be 74 000 MT of sorghum and about 36 000 MT of millet. Private and community underground stores are known to exist in the central and eastern clay plains but the amounts within are unknown and are not included in the balance. For the 15 northern states, average per person cereal consumption in 2011 is assumed to be 146 kg/annum, comprising 73 kg of sorghum, 15 kg of millet, 55 kg of wheat, 2 kg of rice & 1 kg of maize.

It is estimated that 5 % of the sorghum, millet and maize produced is used as livestock feed.

Post-harvest losses are estimated at 10 % for wheat and maize, 7.5% for sorghum and 5 % for other cereals. Few studies are known to have been carried out in the Sudan on post-harvest crop losses for maize, sorghum, millet or wheat so these figures are based on studies carried out elsewhere.

Total cereal exports are assumed to have been zero in 2009. Some 400 000 tonnes were exported in 2008, so a similar quantity may be exported in 2011. Commercial imports of cereals are normally in the order of 1.8 million tonnes of wheat and 50 000 tonnes of rice.

Table1: Cereal Balance sheet (000 MT)-CFSAM 2010/11

	Total cereals	Sorghum	Millet	Maize	Wheat	Rice
Availability	6083	4680	703	42	633	25
Opening stocks	310	74	36	0	200	0
Production	5,773	4606	667	42	433	25
Utilization	7,493	4680	703	49	1988	70
Food	4921	2461	506	34	1854	67
Feed	542	500	33	9	0	0
Seed	85	46	16	1	20	2
losses	429	350	33	4	41	1
Export	650	650	0	0	0	0
Closing stocks	989	673	115	0	200	0
Commercial imports	-1533	0	0	-6	-1482	-45



Integrated food security phase classification (IPC)²

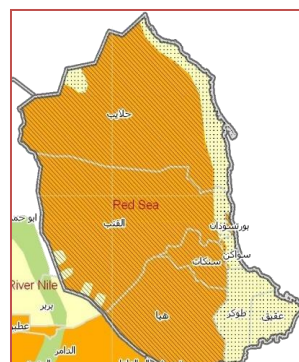
Darfur States In the three Darfur states, the food security situation has improved in 2010 compared to 2009, which is mainly due to an overall good harvest in addition to a noticeable improvement in the security situation. Nevertheless, West Darfur and South Darfur have the highest rates of food insecure households in Northern Sudan. Compared to last year, the food security situation has deteriorated for IDPs and residents in North Darfur, while the others have experienced a significant improvement (93 percent are now food secure). In South Darfur, there is a slight improvement in the food security situation for the IDPs. This is mainly attributed to the reduction in the cost of the minimum healthy food basket and to the availability of food items from own sources during the post harvest season.

Livelihood interventions and support return of IDPs to their original villages in Darfur requires concerted and systematic effort. In greater Darfur states the objective of intervention should be directed towards encouraging returns, restoring livelihoods and improve access to basic services in the returnee villages and strengthening safety net programs for food-stressed populations, including targeted food subsidies and emergency food security reserves system.

² The Integrated Food Security Phase Classification (IPC) is a standardized tool that aims at providing a "common currency" for classifying food security. Using a common scale, which is comparable across countries, will make it easier for donors, agencies and governments to identify priorities for intervention before they become catastrophic.

Eastern states

Red Sea State: Red Sea State is generally classified as chronically food insecure because of the high variability of rainfall, scarcity of water, and extreme temperatures. People have over years adopted a set of flexible strategies allowing them to make the maximum use of the resources available, such as herd diversification.



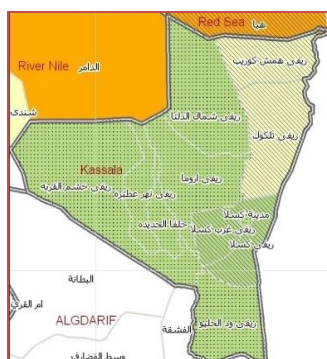
Toker delta and other areas around khors are mostly subsistent farmers and classified as moderately borderline food insecure, with cereal production of 29,268 MT. Red sea state recorded the highest GAM³ and SAM rates allover the country, ranging between 13.8 GAM and 4.7 SAM⁴ during the reporting period, which is above threshold associated with malnutrition diseases like diarrhea, trachoma and TB. Structural humanitarian support in areas of water and sanitation and other basic services are of prime priority to improve food security situation and alleviate poverty.

Halaib and Sinkat localities have encountered by poor infrastructure, prevalence of chronic drought conditions and reduction in livestock numbers due, and poverty. Nutritional situation in rural Red Sea state is critical, associated with prevalence of malnutrition diseases such as diarrhea and trachoma and TB.

³ Global Acute Malnutrition (GAM)

⁴ severe acute malnutrition (SAM)

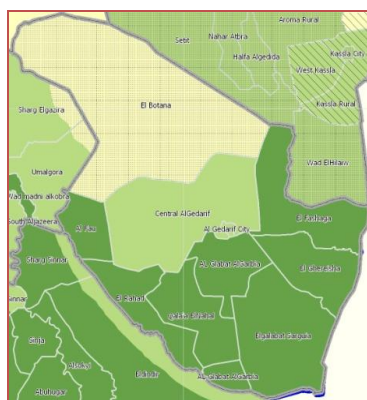
Kassala State: As a result of good rainy season, good pasture conditions and better supply of agricultural inputs, overall food



security situation in Kassala state has changed from moderate food insecure to generally food secure, while Hamashkorib and Talakuk localities

remained moderately food insecure. This may be attributed to existence of IDPs and refugees camps. IDPs in camps remained relatively in good conditions and have received their rations and managed to meet their non food needs in affordable prices. General Food security situation has improved at Kassala rural, ALgash and Hamashkorib due to good rainy season, and effective humanitarian targeted interventions. Khashm Elgirba locality identified as watch because the purchasing power of the majority of local communities has been depleted through time.

Gedarif State: Large portion of Gedarif state lie within the basement complex formation, access to water is considered a serious problem in the summer, households in



rural communities; spend a remarkable proportion of their income to get water for both domestic use and for small

animals. Nutrition survey during the reporting

period showed Severe Acute Malnutrition (SAM) value of 6.9% which is very high compared to the international standards.

Greater Kordofan

North Kordofan has a high percentage of households in the food insecure category, with



as many as 59 percent of the households are in the moderately food insecure category.

The food security situation improves gradually from the north towards the south, with northern households having much less favourable consumption indicators. This appeared to be due to the generally drier conditions in the north, which limited the livelihood options in the area. A small proportion of the currently food secure will become food insecure during limited periods of the year. However, even those who move from being food secure to food insecure are in a chronic pattern that remains unchanged year after year.

Security tensions have been reported in Gubiesh, Annuhad and Wad Banda locality preventing farmers to access their land at the outskirts of the cities. Food security situation in these localities has slipped to moderate food insecurity level.

Overall change from chronically food insecure to moderately borderline food insecure has reported compared to the previous reported period. This is mainly because of good rainy

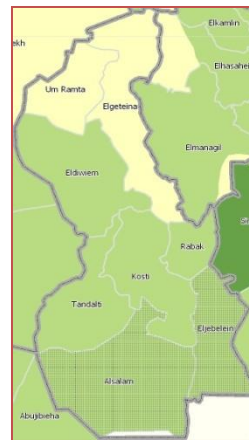
the area. Conflict over water and pasture in the western and Eastern border areas are common which are affected by the referendum, and remaining large number of IDPs from south. Food security situation in central localities of South Kordofan continued at moderate food insecure category. No change in food security situation has been reported in Abujibeha, Talody, and Rashad locality east of the state.

Early warning signals indicating potential stresses over livelihood of local communities in the state are reported due to high food commodity prices, and restriction of pastoralist movement south to during dry season.

White Nile state

The food security situation in White Nile State is very similar for urban and rural households, where the majority of households are food secure. About 33 percent of urban and 35 percent of rural households are moderately food insecure.

Due to favorable agro-climatic conditions, food security situation has changed from moderate food insecure conditions in many localities 3 months ago to generally food secure situation all over the state. Livestock body conditions are better than the last season due to rich pasture and good access to water resources.



Population Movements in White Nile State:

Jabalain locality is the southernmost part of White Nile state, sharing border with the Renk County in Upper Nile state (about 50km). The border between the two states is among the five disputed border areas along the border between the South and the North.

In Jodah Al Fokha, located 80 kilometers south of Rabak where most of the population estimated at 3,000 persons are agro-pastoralist community, who during the dry season (November-June) move with their herds into the south as far as the Sobat River in Upper Nile. The area is also home to small other ethnic group Burgo, Falata and Deghiem. In October 2010 some of these communities started to leave Joda Fokhar because of continuous harassment by SPLA. Around 2,000 moved to the current location, 22 kilometres south of Rabak, with very limited and poor social services. Women and children and especially widows are most vulnerable in both areas as a result localities of Al-Jabalain and Assalam have been put under watch status because security tensions have been reported across the border with South Sudan.

Gazira State:

Moderate food security situation reported 3 months ago has changed to generally food security situation in all localities of the state. No water shortages have been reported both for irrigation and domestic use. A narrow strip in the far eastern parts of the state continued to suffer of chronic problem of water quality for domestic use and for animal



use, as a result general food security situation has been changed from chronically food insecure to borderline food insecure due to relatively good rains.

Blue Nile State: Good rainfall performances enhanced food security situation compared to previous season. Roseris locality has shifted from chronic food insecurity to general food secure. Bau locality has shifted from acute food insecure and livelihood crises to chronically food insecure, due to deteriorated nutritional situation caused by food habits of local communities. Gessan



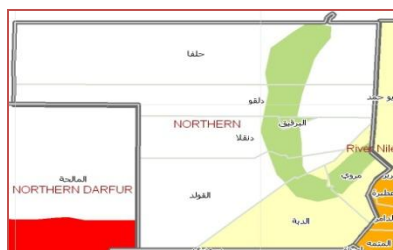
locality has shifted from moderately borderline food insecure to generally food secure. Kurmuk locality has shifted from acute food insecurity and livelihood crises to borderline food insecure with high potential of worsening nutritional condition. Localities bordering South Sudan are classified as watch as returnees from the north are concentrated along the already fragile areas in Al-Kurmuk and Bau. Humanitarian intervention may be needed to mitigate the fragile situation in the ground.

Sinnar State: Food security situation has improved significantly all over the state as a result of good rainfall performance in season 2010/ 11. This has been associated with good condition of livestock.



However, 600 families from Goz Fami in Upper Nile has forced to leave their residences in Upper Nile state as they have decided to cross the border to the North and settled in El Dali locality Sennar State, and hence the area has been marked as watch.

Northern state: The state remained generally food secured. No change has been reported in livelihood strategies of the people. Merewe and EL-Dabba



localities also remained chronically food insecure due to persistent problems caused by Haddam and desertification in addition to the noticeable migration of the people to the urban centers and to Gulf countries. Increased flood has benefited farmers to do more recession agriculture and encouraged them to increase cultivated areas under Damara season and hence good harvest is expected out of Damara season as well as winter crops.

River Nile State: Despite a limited crop production (which is around 35,000 MT), increase in livestock numbers from last year can enhance access to food from animal products which provides diversified food and improve the nutritional status of the population. In general, no change in food security has been observed compared to situation in the last 3 months. Berber and Shendi are reported as borderline food insecure localities



while the rest of the localities are classified as chronically food insecure.



Market and Prices Analysis

Food prices in Sudan are influenced by the performance of cropping season. Affordable food prices remain the key determinants of food security in Sudan. Even if there are huge stocks in the market, the eroding purchasing power would make it impossible for the low income people to acquire their basic food needs.

Transportation costs in Sudan are very high influencing delivery costs which could cause disruption in the market and puts further hurdle in the way of the poor accessing food. Cross border trade of cereals should not be hampered with a lot of state level tariffs as food cereals need to move from surplus production areas to deficit areas and counter balance demand and supply.

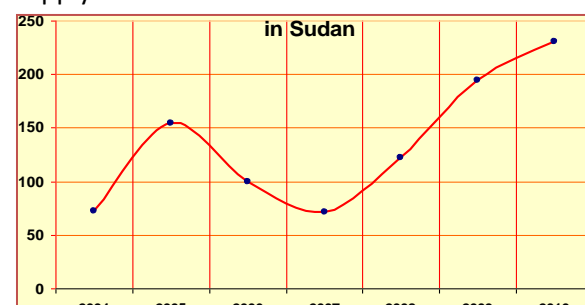


Figure 2: Intra seasonal variation of sorghum prices in Sudan

However, although sorghum prices has shown some declines for the last four months, other food prices continue to escalate due to global soaring of food prices. High prices of staple food last season restricts household access, especially for poor household who spend on average 60% of their income on food.

Grain prices has shown relative declining in October and November in all observed markets from their extremely high levels, but remained above average levels for this time of the year.

Prices of sorghum and millet in December have declined by about 35 and 45 percent, respectively, compared to the high prices in July. On the other hand, in December prices of wheat increased by 30 percent compared to July which is attributed mainly to global hikes of wheat prices.

Charts below shows behaviour of price from Dec 2009 to Dec 2010.

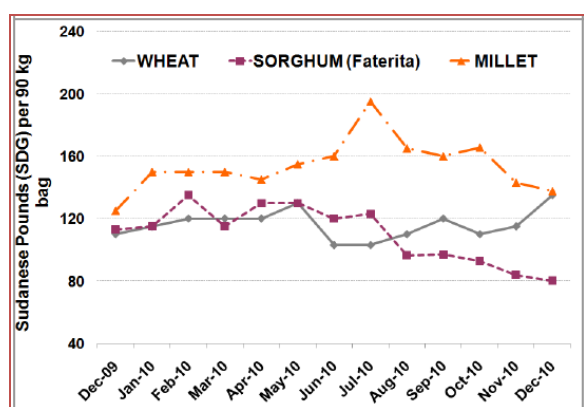


Figure 3 Nominal wholesale prices of stable food cereal in Khartoum (Dec2009- Dec2010)

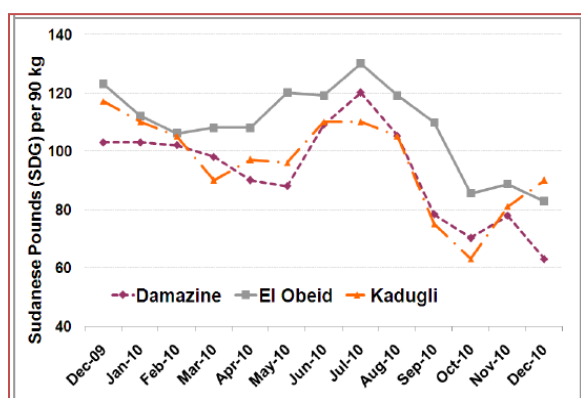


Figure 4: Nominal wholesale prices of sorghum in selected markets (Dec2009- Dec2010)

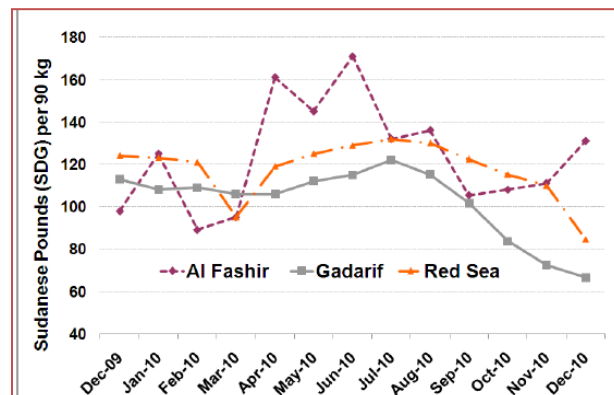


Figure 5: Nominal wholesale prices of sorghum in selected markets (Dec2009- Dec2010)

Prices of livestock for December 2010 are significantly higher than normal for all types of livestock in almost all observed markets. This could be ascribed mainly to good pasture condition, and better accessibility to water resources compared to the previous season and increase in demand from international markets. Thus, terms of trade are expected to deteriorate further favouring animal herders in the coming months.

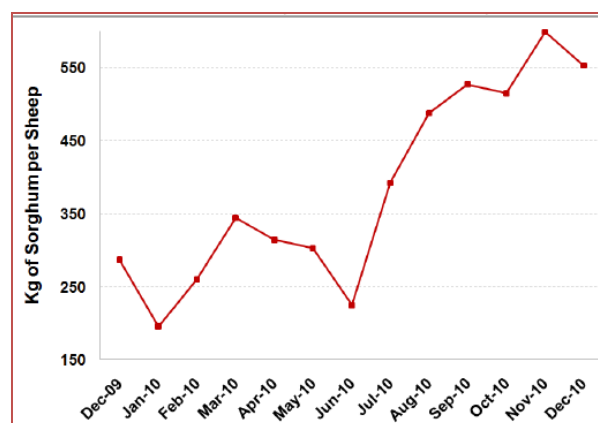


Figure 6 Term of trade for Sheep in Omdurman (Elsalam) livestock market (Dec 2009- Dec 2010)

This could be ascribed mainly to good pasture condition, and better accessibility to water resources compared to the previous season and increase in demand from international markets as well. Thus, terms of trade are expected to

deteriorate further favouring animal herders in the coming months.

Strategic Reserve Corporation (SRC)

SRC has to play vital role this season. The SRCo should be able to acquire enough grain reserves at this time of low prices. Then, they should be able to release this same grain at the lean season (June – September) when prices usually reach at their peak. Effective stabilization of food grain price requires proper assessment of markets – intervening in support of producers when prices start to decline significantly and release grain when prices start to hurt consumers. The SRCo role should also be systematically integrated with humanitarian local and international agencies, like Zakat and WFP (for promoting their local purchase for humanitarian assistance activities).



The current hikes of prices is one of several compounding factors that would have impacted adversely food security situation, especially among the urban poor and traditionally food insecure groups, i.e., the pastoral, agro-pastoral and marginal agricultural areas.

Poor infrastructure and weak marketing system continue to place physical and financial constraints on access to food and markets. Heightened incidents of conflict, livestock

raiding have also constrained production and precluded access to markets and pastures in some areas in Darfur and south Sudan and transitional areas.



Food security outlook:

Lean Period (May to Sep 11):

Although it is too early to predict, the usual scenario is that the food security situation is likely to exacerbate during the lean months of May to September. Major hazards in this period will include high food prices; poor terms of trade when household own produced food begins to dwindle. These conditions are projected to manifest among poorer households. Poor households will mostly engage in normal coping strategies which would include the consumption of wild foods, reliance on remittances, and limiting portion size of consumption and decreasing the number of meals consumed per day.

The most likely food security scenario between May to September: Despite the continuation of current generally food-secure conditions throughout the northern states at the aggregate level, there are areas of concern, such as the three protocol areas, greater Darfur, drier parts of the country that are traditionally grain-deficit areas, including North Kordofan state, Red Sea state, and parts of Butana plains, where pastoral and agro-pastoral households will most likely face food insecurity when pasture and water conditions for animals deteriorates. Erosion of livelihood and growing levels of poverty will also contribute to food security deterioration among the groups

rendered chronically food insecure - Kordofan, Darfur and Red Sea areas.

In the three protocol areas and Abeyie, food security conditions could deteriorate further if no timely and adequate mitigation measures are immediately put in place.

Following the lifting of the export ban on cereals, traders are likely to move more cereals across the border, which will reduce supplies inside the country which will influence cereal prices. This situation will most likely lead to constrain the ability of poor households to access food and worsen their food security conditions. In addition, as fuel prices have increased, transportation costs from surplus cereal producing areas will increase further and cause cereal prices to increase, offsetting the cost savings of the lower prices of cereals in surplus areas.

High food prices will most likely cause an earlier depletion of food stocks and could cause households to slip from general food security into moderate food insecurity level.

Situations will become clearer as we approach to the start up of the lean season month of May. More outlook information from the Sudan Metrology Authority and other ground market and security information will also be expected to provide more insight to the situation. FSTS in collaboration with core partners will continue to monitor the situation.

Returnee's overview

More than 210,000 people have returned from North to South since late October, according to tracking by local authorities and the International Organisation for Migration (IOM).

The number of southerners that have moved from north since October 2010

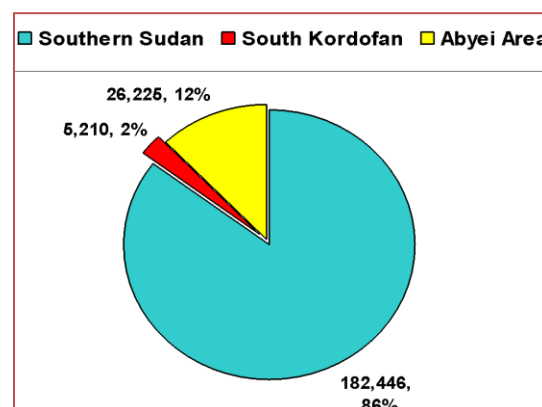
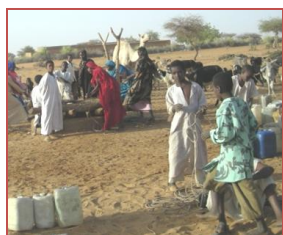


Figure 7: Percentage of returnees' destinations - IOM

Kosti transit centre remains the main transit hub for returnees moving southwards. Approximately 80 per cent of all returnees pass through the centre. According to IOM, 124,000 Southerners have transited through Kosti since October 2010. According to the international NGO, ADRA, there are currently 3,085 people at the centre, of which UN agencies and NGO partners continue to provide assistance to returnees in Kosti. At the train station, ADRA has built latrines, the SRCS has opened a clinic, and WFP has provided food rations. The NGO FAR also continues to provide coordination and management services, supported by the UNHCR.

Concerning the movements of Northerners from southern Sudan to northern Sudan, in addition to some 2,000 people who left Upper Nile for White Nile State, the Sudanese Red Crescent Society (SRCS) has reported that a group of more than 3,000 people is moving from Upper Nile State in southern Sudan to Al Muzmum town in Sennar State in the North. The number of these new arrivals is expected to reach 10,000 people, according to the SRCS.



Humanitarian Assistance

Disagreement over the issue of border demarcation in some transitional areas may result in wide-scale violence and armed conflict, leading to large scale displacement in many parts of the country. Potential for improved harvests in South Sudan compromised by physical insecurity in some locations may exacerbate food insecurity and malnutrition rates beside food distributions might be interrupted due to breaks in pipelines. As a consequence, food security situation in the south Sudan is expected to remain precarious.

However, with a forecast of about 400 000 people returning to the South, the estimated deficit may for the South may increase up to 340 000 as reported by FAO/WFP mission. The mission estimated that 890 000 people were currently severely food insecure in the south and 2.4 million were moderately food insecure.

In Red Sea state, rising chronic food insecurity has added to the growing numbers of destitute pastoralists. Destitution is largely a consequence of incomplete livelihood recovery, after devastating floods took place in November – December 2010. Short-term response that include targeted interventions to protect the food entitlements of the most vulnerable groups and income and livelihood programs for the poor to mitigate the immediate impacts of the soaring food prices continue to be critical.

According to WFP, around 3 million beneficiaries will be supported by 410 000 MT of food assistance in 2011

Targeted beneficiaries are individuals and families who are acutely vulnerable to food insecurity, not just as a direct result of conflict but also because their livelihoods depend on natural resources that have been depleted over the years as a result of the conflict and poverty. Frequent natural disasters and persistent high food prices further compound households' food insecurity.

Specific demographic groups have been targeted for specific support, including children under five, school-age children, pregnant and lactating women, and the elderly. These groups are disproportionately exposed to risks associated with the ongoing conflict as well as broader socioeconomic trends such as limited investments in health and education services.

Figure 8 below represents the number of beneficiaries, based on needs, in northern Sudan and that WFP intends to pursue in 2011. Those beneficiaries will be supported by approximately 410,000 metric tonnes of food.

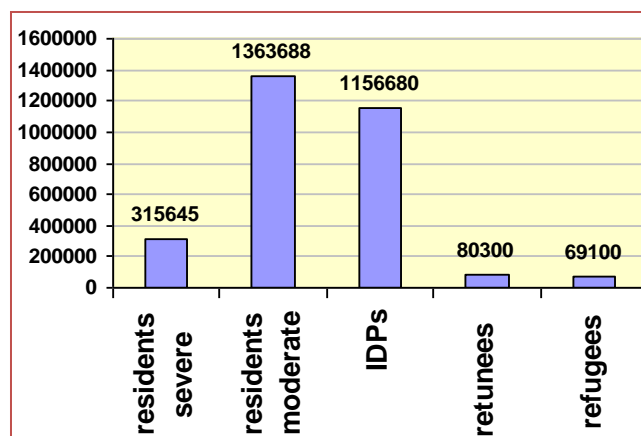


Figure 8 Estimated number of beneficiaries in 2011 - WFP



UN and partners Work Plan 2011

In December 2010, the 2011 work plan for Sudan has been launched. The 2011 is organized around 3 major priorities: improved preparedness and strengthening capacities of all humanitarian actors and greater access to aid and basic services for vulnerable communities with an emphasis on creation of conditions conducive to durable solutions across Sudan.

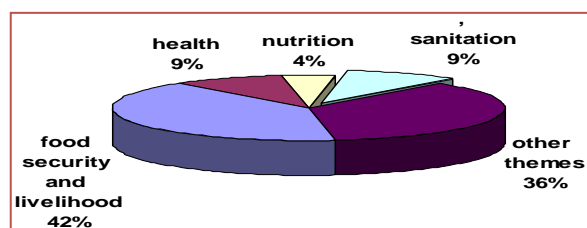
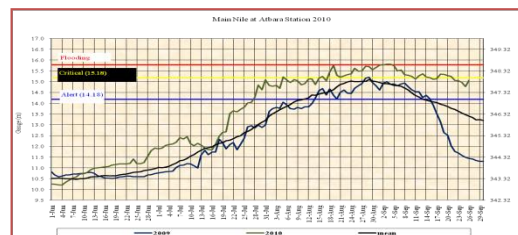


Figure 9: UN & partners Work plan requirements %

In order to meet these priorities, the work plan outlines \$ 1.7 billion in humanitarian requirement for the year of which 42% is assigned for food security and livelihood. Worthy note, for 2010 humanitarian organizations received \$1.2 billion for work plan projects, meeting around 70% of the year's total requirement.

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Flood season 2010 The heavy rains in Sudan started during the first week of July 2010, and resulted in flash floods that damaged property and infrastructure in some parts of the country. As the rains gradually intensified, they caused flash floods, which culminated into extensive flooding and cumulative effects on the vulnerable communities.



The floods mainly affected the following six states: River Nile, Gedaref, White Nile, North Kordofan, Sennar. The impacts and damages caused by the floods identified within the best scenario prepared prior to flood season table illustrates the statistics of the floods at the end September 2010.

State	Totally damaged houses	Partially damaged houses	Fatality
N.Kordofan	629	829	24
Red Sea	1,680	1,129	16
River Nile	1,718	704	1
White Nile	937	406	1
Kassala	584	952	1
Gedaref	634	610	7
W.Darfur	638	365	
Northern	219	585	
S.Kordofan	50	566	
Sinnar	147	197	3
Algezera	160	130	4
Khartoum	82	182	4
S.Darfur	53	64	21
N.Darfur			1
Total	7,531	6,719	82

Table 2: Damage caused by flood/ State - HAC - MoIWR

