Concerns over 2021 cropping season due to high prices of inputs, including fuel

Planting of 2021 crops, for harvest from October, is well underway, as the June-September rainy season was characterized by an early onset at the beginning of May. Rainfall continued at above-average levels and, in mid-June, satellite estimates indicate cumulative rainfall surpluses over most cropping areas. According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecasts, seasonal rains are expected to be above average across the country. If these forecasts will materialize and if the temporal distribution of rains will be favourable, the abundant precipitation will boost crop yields. However, there will be a heightened risk of flooding, especially in low-lying and riverine areas alongside the River Nile and its tributaries.

Planted area and yields are likely to be affected by the soaring prices of agricultural inputs, due to sustained inflation and dwindling foreign currency reserves that are hampering imports. In addition, the removal of fuel subsidies in June will constrain farmers’ access to fuel, especially affecting the semi-mechanized and irrigated sectors, which account on average for about half of the aggregate cereal output.

Above-average 2020 cereal production despite widespread floods

The harvest of the 2020 coarse grains crops (sorghum and millet) was completed in early 2021, while the harvest of the small irrigated wheat crop was concluded in March. According to the findings of the government-led Annual Crop and Food Supply
Assessment Mission, the 2020 aggregate cereal production is estimated at about 8 million tonnes, 12 percent up from 2019 and about 20 percent higher than the average of the past five years, driven by an increased sorghum output.

Farmers expanded the area planted as a response to the high market prices of grains and to the increased availability of fuel and agricultural finance, while exceptionally abundant precipitation amounts during the 2020 June-September rainy season boosted yields. Torrential rains triggered widespread floods, affecting about 1.5 million hectares of crops. However, the negative impact of floods was mitigated by the unusual continuation of the rainy season until October, which allowed the full maturation of sorghum crops that were later planted in August in substitution of sesame crops that were affected by floods and Sesame Gall Midge.

Cereal prices at exceptionally high levels

Prices of sorghum and millet declined in some markets by up to 15 percent between February and April, mainly due to a substantial devaluation of the Sudanese Pound from SDG 55/USD to SDG 375/USD in late February (FPMA Food Policy), which reduced the gap between the official and parallel market exchange rates, easing inflationary pressures. Subsequently, prices resumed their upward trend, which started in late 2017, increasing by 5-15 percent in May as the local currency further depreciated on the parallel market from SDG 393/USD in April to SDG 436/USD in May. Prices of wheat, mostly imported, levelled off in April and May in some markets as local harvests in March increased market availabilities. Prices of cereals in May were exceptionally high, about two times their already elevated year-earlier values, mainly due to a weak local currency and soaring prices of fuel and agricultural inputs inflating production and transportation costs.

Food security situation affected by multiple shocks

According to the results of the latest Integrated Food Security Phase Classification (IPC) analysis, about 9.8 million people (21 percent of the analysed population) are estimated to be severely food insecure (IPC Phase 3: "Crisis" and Phase 4: "Emergency") in the period June-September 2021. This figure includes about 7.1 million people in IPC Phase 3: "Crisis" and 2.7 million people in IPC Phase 4: "Emergency" levels of acute food insecurity. While the total number of severely food insecure people is similar to the estimate of one year earlier, the number of people estimated to be in IPC Phase 4: "Emergency" is more than 20 percent higher on a yearly basis, indicating an increased severity of food insecurity.

The main drivers are macro-economic challenges resulting in rampant food and non-food inflation, the lingering impact of 2020 widespread floods on livelihoods and the escalation of inter-communal violence in western Greater Darfur Region and in eastern South Kordofan, North Kordofan and Blue Nile states.

The highest prevalence of food insecurity is reported in East, North and West Darfur, in Blue Nile and in North and South Kordofan states, where the macro-economic challenges are compounded by inter-communal violence. In these areas, between 25 and 30 percent of the population is estimated to be severely food insecure. In addition, 18 percent of the population of Khartoum State is estimated to face food insecurity, 3 percent more than the same period of the previous year, mainly as a
consequence of increasingly severe food access constraints for market dependent urban households.

Humanitarian needs are particularly high for IDPs, estimated at 2.55 million people, and for 1.1 million refugees, including 793,000 people from South Sudan and 45,000 people from the conflict-affected Tigray Region of Ethiopia.

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