التقرير الدوري لمنظمة الأغذية والزراعة عن السودان- 2022

Sudan- Country Briefs

Reference Date: 11-July-2022

FOOD SECURITY SNAPSHOT

- **Critical food security situation, with about 11.7 million people estimated severely food insecure between June and September**
- **Aggregate 2021 production of sorghum, millet and wheat estimated at about 5 million tonnes, around 30 percent below average**
- **Wheat import requirements at high levels, there are concerns about country's import capacity**
- **Prices of cereals at exceptionally high levels, supported by tight supplies, currency weakness and soaring costs of agricultural inputs**
- **Concerns over 2022 cropping season due to high prices of inputs, including seeds, fuel and fertilizers, despite favourable weather forecasts**

Critical food security situation due to multiple shocks

According to the results of the latest Integrated Food Security Phase Classification (IPC) analysis, about 11.7 million people (24 percent of the analyzed population) are estimated to be severely food insecure (IPC Phase 3: [Crisis] and Phase 4: [Emergency]) during June to September 2022. This figure includes about 8.55 million people in IPC Phase 3: (Crisis) and 3.1 million in IPC Phase 4: (Emergency) levels of acute food insecurity and it is almost 20 percent higher on a yearly basis.

The main drivers are macroeconomic challenges resulting in rampant food and non-food inflation, tight supplies due to a poor 2021 harvest and the escalation of intercommunal violence, mainly in the Greater Darfur and Greater Kordofan regions, and in Kassala State.

The highest prevalence of food insecurity is reported in Central, North and West Darfur, in Blue Nile and in North and South Kordofan states. In these areas, between 30 and 42 percent of the population is estimated to be severely food insecure. In addition, about 20 percent of the population of Khartoum State is estimated to face food insecurity, mainly as a consequence of severe food access constraints for market-dependent urban households.

Humanitarian needs are particularly high for IDPs, estimated at about 3 million and for 1.1 million refugees, including 806 000 people from South Sudan and 58 000 people from the conflict - affected Tigray Region of Ethiopia.

Below-average 2021 cereal production due to erratic rains and pest outbreaks

According to the findings of the government-led Annual Crop and Food Supply Assessment Mission, the 2021 aggregate cereal production is estimated at about 5 million tonnes, 35 percent below the output obtained in the previous year and about 30 percent below the average of the previous five years.

The 2021 rainy season was characterized by an irregular distribution of rains. After an early onset in May and prolonged dry spells in July, torrential rains triggered floods in late July. Widespread replanting took place in August, but replanted sorghum crops were often attacked by sorghum midge, especially in Gedaref and Kassala states. Crops were affected by dry spells also during the final months of the season, further constraining yields.

Wheat production is estimated at about 600 000 tonnes, 13 percent below the 2021 average output, reflecting reduced plantings due to shortages of improved seeds and fertilizers as well as increasing electricity rates affecting pump irrigation.

Wheat import requirements at high levels, but there are concerns about country's import capacity

Import requirements for the 2022 marketing year (January/December) are forecast at about 2.48 million tonnes, including 2.05 million tonnes of wheat and 353 000 tonnes of sorghum. Wheat is mainly imported and consumed in urban areas, where about 40 percent of the population resides.

In past years, over half of wheat imports were sourced from the Russian Federation. However, due to soaring shipping rates and the financial sanctions imposed on the Russian Federation following the war in Ukraine, it is very likely that the country will need to import wheat from farther and hence costlier sources, leading to higher domestic prices. The impact of the Ukraine war exacerbated the existing challenges affecting the capacity of the country to import, including low foreign currency reserves and the continued depreciation of the national currency.

Cereal prices at exceptionally high levels

Prices of sorghum and millet more than doubled in several markets between January and June 2022, due to a faster-than-normal stock depletion after the poor 2021 harvest. Prices of locally produced wheat declined by 30 percent between April and May as the small local harvest in March increased market supplies. Subsequently, prices resumed their increasing trend in June due to sustained demand for local wheat caused by the high prices of imported wheat.

Overall, prices of cereals in June were at record levels, between two and three times their year-earlier values, mainly due to tight domestic availabilities of locally produced cereals, high prices of wheat prevailing on the international market, a weak national currency and high prices of fuel and agricultural inputs inflating production and transportation costs. Heightened political instability and intercommunal clashes since late October 2021 exerted further upward pressure on prices.

Concerns over 2022 cropping season due to high prices of inputs, including fuel, seeds and fertilizers

Planting of 2022 crops, for harvest from November, is underway and will be concluded in July. The start of the June-September rainy season had a mixed performance. Below-average precipitation amounts were received over eastern key producing areas, including Gedaref and Sennar states, while rainfall was above average over most of the western Greater Darfur Region and in the southern Greater Kordofan Region. In particular, in Southern Kordofan and White Nile states, early and abundant rains in May (Precipitation anomaly map) triggered floods which affected 2 200 people.

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 have a positive impact on crops. 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 soaring prices of fuel and agricultural inputs, including seeds and fertilizers. The price increases are due to sustained inflation and dwindling foreign currency reserves hampering imports and by the war in Ukraine, which has caused a sharp increase of fuel and fertilizer prices on the international market. Soaring fuel and fertilizer costs will particularly affect the semi-mechanized and irrigated sectors, which account on average for about half of the aggregate cereal output.