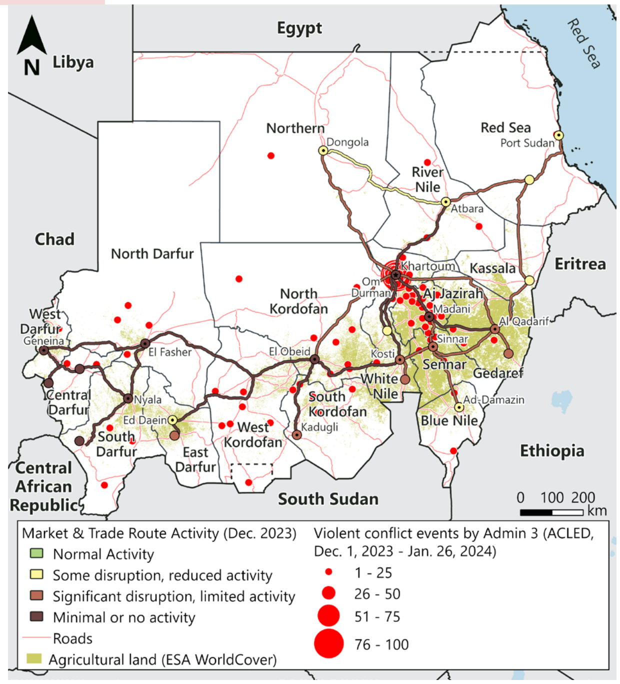
FEWS NET
Famine Early Warning Systems Network

Sudan Food Security Alert February 1, 2024

Clashes in Sudan's breadbasket threaten national food availability

Food assistance needs in Sudan are rapidly accelerating due to the recent expansion in fighting between the Sudan Armed Forces (SAF) and the Rapid Support Forces (RSF) into the southeast. Sudan is now expected to have the third highest share of the population in need among FEWS NET's monitored countries in 2024. The opening of this new front is further disrupting trade and agricultural activities in Sudan's breadbasket, posing a significant threat to national food availability. The widening of hostilities, combined with large-scale population displacement, atrocities against civilians, destruction of goods and infrastructure, pervasive looting, and poor humanitarian access, is worsening an already severe food security situation. Crisis (IPC Phase 3) outcomes are widespread, Emergency (IPC Phase 4) outcomes exist in heavily impacted urban areas, and some households are expected to deteriorate to Catastrophe (IPC Phase 5) in Omdurman of Khartoum and El Geneina of West Darfur in the upcoming lean season. **Expedited approvals for humanitarians to cross conflict lines and assurances of safe passage for both aid and commercial trade flows, at a minimum, are critical to preventing deepening hunger during the 2024 lean season.**

Figure 1 **Markets and trade route activity map, cropland, and violent events, December-January 2024**



Source: FEWS NET using data from USGS and ACLED

Overall, total food availability for the 2023/24 consumption year is expected to be significantly below average due to below-average domestic cereal harvests,[i] low opening food stocks, significantly below-average wheat import volumes, and bureaucratic and insecurity-related challenges impeding food assistance deliveries. The southeast typically contributes over half of Sudan's total cereal production and is the main area for national grain storage. Attacks in mid-December on Wad Madani and surrounding towns in Al Jazirah that expanded into parts of Sennar, White Nile, and South Kordofan in January have interrupted main season harvesting of sorghum and millet, worsening already below-average expectations for the national cereal harvest. The fighting has also interrupted the cultivation of winter wheat in the Gezira irrigation scheme, which typically accounts for 40-50 percent of total wheat production, and damaged critical irrigation infrastructure. While Sudan normally relies on imports to meet 80-85 percent of annual wheat consumption requirements, the reduction in domestic production will compound already large import deficits. According to the Ministry of Agriculture, total official wheat imports in 2023 reached only half of what is typically imported and only one-third of estimated demand due to declining government revenue and shocks to the supply chain. Importers, banks, warehouses, transportation companies, distribution centers, and retailers alike have been destroyed, closed, or resorted to limited operations. Wheat availability will be significantly below needs in 2024 even after accounting for informal cross-border flows, slightly depressed demand, and shifting consumption patterns. Areas expected to be worst affected by the resulting market cereal supply shortages include parts of Greater Darfur, Greater Kordofan, Khartoum, and Al Jazirah.

Cereal stocks at trader and household levels are also increasingly threatened by unrestrained looting and destruction of markets and stores in conflict-affected areas. Wad Madani, which is the capital of Al Jazirah and a major hub for trade and humanitarian operations following the decline in functionality of Omdurman market in Khartoum, was severely affected by fighting in mid-December with markets, shops, public buildings, private residences, and humanitarian warehouses widely looted. Traders in many major cities across the southeast are reportedly reacting by moving stocks out of main markets or selling atypically early at low prices for fear of looting. This threat becomes even more concerning if the clashes spread to neighboring Gedaraf, host to Sudan's largest silos and food storage capacity, including the strategic reserves of the Agricultural Bank of Sudan (ABS).

FEWS NET Sudan
sudan@fews.net
www.fews.net/east-africa/sudan

Further compounding the loss of stocks and market functionality in the southeast is the worsening disruption of trade and humanitarian aid flows, particularly from typically surplus-producing to deficit-producing areas. The main routes to Greater Darfur and Greater Kordofan – specifically the western route (Wad Madani-Kosti-El Obeid-El Fasher) and the southwestern route (El Obeid-Dilling-Kadugli) – have been significantly affected by rising insecurity and the proliferation of checkpoints. Routes in the east between Port Sudan, Gedaref, and Sennar have also faced increasing disruption following the attacks on Al Jazirah. While they remain under SAF control, activity is limited by the increased number of SAF checkpoints and delayed approvals for convoy movements. Since the start of the conflict, multi-cluster assistance is estimated to have reached only about 10 percent of the population. Given the heightened administrative challenges to movement and deteriorating insecurity in key cities needed for staging humanitarian operations, food assistance deliveries based out of Al Jazirah remain suspended, and access to hard-to-reach areas is likely to be even more seriously constrained. To expedite aid deliveries, WFP is reportedly exploring opportunities for increasing cross-border deliveries of assistance from neighboring countries, including Chad and South Sudan.

Staple food prices are expected to remain atypically high and will continue to rise in the coming months, driven by the intensifying disruption to market functionality and trade flows, anticipation of below-average harvests, and high fuel and transportation costs. However, in the immediate weeks, prices in some southeastern markets will likely be more volatile due to an increase in supply related to the atypical sale of stocks by traders, whereas supplies will remain tight in more deficit-producing areas. Indeed, by mid-January, sorghum prices in most of the recently affected production markets in the southeast had declined by between 8 and 10 percent compared to December. By contrast, most consumption markets saw month-on-month increases of between 8 to 15 percent despite the ongoing harvest, and prices were, on average, 45 percent higher than last year.

Large-scale displacement, including secondary and tertiary displacements, is also likely to continue in the heavily populated southeast, accentuating what is already the largest internal displacement crisis globally. The southeastern states have received hundreds of thousands of people displaced from Khartoum who fled with little to no assets and are heavily dependent on host communities. The clashes in Al Jazirah were estimated to have led to the fresh displacement of over 500,000 people, roughly 46 percent of whom were among those previously displaced to Al Jazirah from Khartoum. In addition to physical displacement, the unabated looting, destruction, and disruption of main livelihood activities are contributing to the widespread impoverishment of populations in RSF-attacked areas. The area remains highly volatile, and there are elevated concerns that the fighting may spread further into Sennar and Gedaref, causing additional displacement, harvest and stock losses, and market disruptions.

The spread of fighting into southeastern Sudan is threatening national food availability and increasing the likelihood of food shortages after the lean season begins as early as in March in the most heavily conflict-affected areas. The size of the population facing Crisis (IPC Phase 3) or worse outcomes is markedly rising across the country given the concurrent scale of looting, displacement, and disruption of livelihood opportunities, markets, and trade. The severity of household kilocalorie deficits is also deepening in areas of highest concern, including parts of Khartoum and West Darfur, leading to high proportions of the population in Emergency (IPC Phase 4) and the expected emergence of Catastrophe (IPC Phase 5) outcomes among worst-affected populations in the upcoming lean season in Omdurman and El Geneina. Expedited approvals for humanitarians to cross conflict lines to assist populations in need, along with assurances of safe passage for humanitarian food assistance and commercial trade flows will be critical to preventing deepening hunger throughout the year, especially during the June to September peak of the lean season and particularly in areas of highest concern.

Recommended citation: FEWS NET. Sudan Food Security Alert February 1, 2024: Clashes in Sudan's breadbasket threaten national food availability, 2024.

[i] Estimates of national-level harvests are currently unavailable due to widespread insecurity that has limited the capacity of the government, UN partners, and the food security cluster to conduct the annual Crop and Food Security Assessment Mission (CFSAM).