

Chapter 1 : Special Report: Sudan - 17 January

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Expansion in cultivated area, partly in response to Government encouragement, and favourable weather in many areas accounted for the increased production. The availability of cereals in will be markedly improved. However, the sharp fall in sorghum prices in major producing areas could result in financial ruin for farmers and substantial reductions in area planted next year. Despite the overall increased production, severe food deficits are anticipated in parts of southern Sudan, mainly due to population displacements, and in parts of the western States of Darfur and Kordofan and Red Sea State where dry spells and early cessation of rain have resulted in the third consecutive reduced crop. Food aid requirements should be procured locally to the extent possible. Rapid intervention in moving grain from surplus to deficit accessible areas is vital to help vulnerable groups and to stabilise prices. The Mission was able to visit 24 of the 26 states in the country, both in Government and rebel held areas. Pre-harvest data on area and yield were provided to the Mission by State Ministries of Agriculture and the various irrigation schemes for all cereal crops in all states in northern Sudan. The Mission cross-checked the data during field visits and farmer and trader interviews. Discussions were also held with key informants from local government administrations, UN agencies and NGOs. Due to lack of infrastructure and systematic data collection, planted area and yield were derived from population estimates and historical data for farm sizes and cropping patterns, adjusted following Mission field observations. Notwithstanding some flooding and dry spells in parts, the cropping season in Sudan was characterised by generally favourable weather conditions. Farmers increased their plantings due to favourable weather, relatively high cereal prices at planting and in response to Government inducement to cultivate more cereal crops, particularly in the irrigation schemes. As a result, area harvested under cereals in increased by nearly 30 percent compared to Cereal production on the irrigation schemes, mechanised farms and traditional sector has increased by 32 percent, 36 percent and 41 percent respectively compared to last year. In the Southern sector, civil conflict and insecurity have continued to hamper agricultural activities. However, in rainfall has generally been good over much of the south and production has improved over last year, especially in Western Equatoria. Improved access to agricultural areas in many zones, with the notable exception of Raga, parts of Unity State and parts of Sobat Corridor in Upper Nile State, has increased planted area. Crop pest and disease levels have been low and have contributed further to the satisfactory season. Rangelands have benefited from the favourable rains, and livestock condition is generally good at present. The continuing adherence to the peace accord between the Dinka and the Nuer is expected to benefit pastoralists over significant areas of the south. This above average crop, coupled with carryover stocks and forecast commercial imports, consisting mainly of wheat, will result in an overall ample cereal supply in This will allow increased cereal consumption and building up of stocks. In response, prices of cereals in major producing areas of central and eastern parts of the country have declined sharply. The decline in prices coupled with a sharp increase in gasoline prices has discouraged many farmers from harvesting standing crops in parts. With limited prospects for exports in , mainly due to improved harvests in neighbouring countries, heavy supplies are expected to depress prices further. Substantial purchases are required from surplus producing areas to support farmers as well as consumers in deficit areas. Livestock in the north of the country are generally in good condition. However, poor rangeland productivity in some areas, particularly in parts of Kordofan and Darfur, is expected to result in severe feed shortages in the coming months, necessitating stock movements. This is by no means unusual, but the situation is exacerbated this year by the very depressed prices of livestock resulting from the ban on livestock imports from the Horn of Africa, including Sudan, by countries in the Arabian Peninsula due to suspected Rift Valley Fever. Recent reports indicate that the ban by Saudi Arabia, by far the most important importing country, has been lifted, but it will take some time for the effect of this to filter down to pastoralists. In the meantime, stocking levels are expected to remain higher than can be adequately sustained through available grazing, for lack of marketing outlets. While the overall food situation is favourable, the global

picture masks serious deficits at regional and local levels. The predicted cereal surpluses in West Equatoria, Lakes and Upper Nile States will be unavailable in deficit areas due to market segmentation and absence or break down of normal trade routes and infrastructure. Even within surplus States the inability of both urban and rural poor to access the available food means that food assistance will be required in For most, this is the third consecutive year of poor harvest. As a result, prices of cereals, particularly for the staple millet crop, have remained unusually high, thus eroding the purchasing power of the population, with large segments depending of food assistance. Therefore, targeted emergency food assistance will be required in these areas. It is particularly important to facilitate the timely purchase and transfer of grains from surplus to deficit areas to support both producers and consumers. However, the share of agriculture in the economy is declining as petroleum exports increase. In March , the government introduced further agricultural reforms, including the removal or reduction of most direct and indirect taxes on agricultural production and marketing, and a reduction in business profit taxes from 35 percent to 10 percent for all companies engaged in agricultural production, processing and marketing. To compensate for the revenue loss to regional States, a However, this price hike coincided with the harvesting period and substantially increased the cost of production for farmers. This, combined with the current low farm-gate prices of sorghum in major surplus producing areas, has forced some farmers to reduce or abandon altogether the harvesting of their crops. In September , the government established the Strategic Commodity Reserve Authority SCRA in response to food shortages in parts of the country following prolonged drought conditions. Currently, there is also a plan to purchase large amounts of cereals from farmers who were encouraged to plant more cereals this season. Unfortunately, delayed allocation of finance to the SCRA has resulted in losing precious time in supporting farmers and the market. At the time of the Mission, sorghum prices were declining sharply in all major surplus areas, including Blue Nile and Gedaref States. This year, rainfall in the northern sector generally started on time, leading to expectations of higher agricultural production than last year. Overall, and especially in the important Central Region, these expectations have been realised. In Gezira and Kassala, rainfall was noticeably better this year than last. Both Gedaref and Blue Nile registered good rains in June and July which were followed by a dry period; however, this dry spell gave way to heavy rains in August, and satisfactory amounts were well distributed in September and October. Sennar State compensated for a late start to the season with well distributed rainfall during the later months. In parts of the west of the country though, where traditional rainfed farming accounts for nearly all cereal production, the promising rainfall performance early in the season was not always sustained. Some areas suffered from prolonged dry spells, whereas others experienced an unusually early ending of the rains; a notable exception was West Darfur in the extreme west, where rainfall amounts and distribution were better than normal and good cereal production is expected. Red Sea State experienced its third consecutive dry year, apart from the coastal strip where rainfall appears promising for the winter season. Because of the high initial rainfall in many parts of the country, and good rainfall upstream, the level of the Nile was higher than usual this year. Although this led to localised destructive flooding during August, it did allow an increased area of rice to be grown. Vegetable production also benefited from the high river levels. In the southern sector, annual rainfall amounts increase from north to south and from east to west. This year, the rains started on time in most areas, were generally well distributed, and were considered by most farmers to be better than in recent years. However, heavy rains in August spoilt some crops, especially in Bahr el Ghazal and prevented later planting of sorghum in parts of Jonglei where soils remained water-logged for several weeks. Agricultural inputs The principal users of fertilizers, pesticides, herbicides and improved seeds in Sudan are the farmers in the irrigated sector. Fertilizer - usually only urea - is normally provided through the corporations managing the schemes; there may be some under-application resulting from farmers selling all or part of their allocation. Pesticide use on cereals remains low, pesticides being reserved principally for cash crops such as cotton. Increasingly, farmers in the rainfed and mechanised sector are recognising the potential advantages of certain inputs, especially of improved seed. The results, however, are not always striking, depending as they do on the satisfactory implementation of all the other cultivation practices and good rainfall distribution. While it is true that the vast majority of farmers in the traditional sector still use seed saved from their previous harvest and apply no purchased inputs, the small

proportion using improved seed is gradually growing in those areas benefiting from the various distribution programmes of Government, NGOs and international organisations and the results are generally encouraging. Seed distribution is especially important in areas that have suffered repeated droughts where farmers, because of poor or non-existent harvests, have been unable to save seed. The increase in the cost of fuel in October appears to have had little effect on planting operations for sorghum and millet, but has affected harvesting and is expected to have an impact on wheat production during the current winter season. Several states that were expecting high production of cereals were faced with inadequate supply of empty sacks. Weeds, pests and diseases was not remarkable for pest infestation or disease infection amongst the cereal crops, and in those areas where production was poor, low yields were more usually attributable primarily to problems of rainfall distribution. Outbreaks, however, were generally not serious, and certainly not on the scale of two years ago when crops were devastated in the eastern states. Some limited outbreaks of American bollworm were reported in parts of the centre and east. Sorghum smut hit some crops, but usually at a low rate; the traditional sector is most susceptible because of the use of untreated seed. Incidence of downy mildew on millet was observed in parts of North Darfur. Grasshoppers attacked millet, and to a lesser extent sorghum, in many areas, especially in the west. Millet headworm was reported in several parts of the west, often causing a further reduction in yields that were already low in those areas experiencing poorly distributed rainfall. Striga was noted in a significant proportion of sorghum fields, but its severity appears to have been low. Sudan grass and couch-grass were the most troublesome of the weeds. Pests and diseases of non-cereal crops were generally not serious this year, with the important exception of the watermelon bug, which devastated hundreds of thousands of hectares of watermelon in the west of the country. Last year, a food-for-work campaign was mounted, whereby food was earned in return for the manual removal of bugs from the watermelon crop. Despite the fact that the campaign was highly effective in demonstrating its efficacy, the practice does not appear to have been implemented this year. Prices High cereal prices in as a result of poor harvest in and subsequent low quantities of grain in store encouraged further expansion of cereal production in mechanised and irrigated sectors of northern Sudan. However, it is still substantially less than the 5. For instance, in the northern sector, the harvested area of sorghum was 33 percent, and the harvested area of millet 31 percent larger than the equivalent areas last year.

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(a) central government spending (voted):the Supply Estimates include most of the direct spending Â£ billion resources and Â£21 billion capital) by central government departments on, for example, the National Health Service, defence and departmental administration.

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3 Main Estimates, Section 1. Introduction 1. Supply Estimates are the means by which the Government seeks authority from Parliament for its own spending each year.

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