

# SOUTH SUDAN

## Monthly Market Price Monitoring Bulletin

### NOVEMBER 2019



#### Highlights

- In November, food prices in most markets were relatively stable as compared with October but remained above last year and the five-year average.
- Following the flood situation in Bunj (Maban), food prices had the biggest spike which have negatively impacted the purchasing power of poor and very poor households.
- The average price of a standard food basket did not change since October nearly in all monitored places following improved supply from local harvest and imports. However, it has increased in Bunj/Maban by 27 percent as against October 2019 because of the floods.
- Seasonal local harvests and improved flow of commodities from imports have contributed to the observed price stability.
- Other things remaining the same, the prices of staple cereal are expected to follow seasonal trends in the coming two to three months.

#### Macroeconomic situation

- According to the National Bureau of Statistics, Year-on-Year Consumer Price Index for South Sudan increased by 72.7 percent in November 2019, compared with 33.5 percent in November 2018. Food and non-alcoholic beverages increased by 87.1 percent from November 2018 to November 2019, while the prices for health decreased by 23.1 percent and restaurants and hotels increased by 34.2 percent over the same period. The high prices of food and non-alcoholic beverage were mainly driven by higher price of oil and fats.
- In November, the average exchange rate in the Juba parallel market was SSP 315 to the United States Dollar, which is 94 percent above the SSP 162 official rate. Compared with November 2018, the local currency depreciated by 32 percent and remained stable as against the previous month. The official exchange rate remained stable compared to the parallel market rate, increasing by about seven percent compared with November 2018 and remained the same as last month.

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#### **Cereal prices**

- In November, the food prices in most markets remained relatively stable compared with October, with some markets<sup>1</sup> observing price decrease. Prices were above last year and the five-year average. With the harvest season progressing, farming households would be less dependent on the market for staple foods. Additionally, the flow of commodities from the main source market (Uganda) has improved because of seasonal harvest, contributing to the stability in prices.
- Sorghum prices exhibited mixed trends while it declined significantly (20 percent) in Juba, it increased in Upper Nile, Unity and Northern Bahr el Ghazal markets (7 to 27 percent) even as the main harvest season progresses. The highest increase (27 percent) in Upper Nile (Bunj) was due to the flood that has disrupted agricultural production, market access and supply of food commodities. In November, Renk had the lowest sorghum price, fetching at SSP 388 per 3.5 kgs while Mingkaman had the highest price, at SSP 800 and followed by Bunj, at SSP 633.
- The retail price of maize grain dropped in Juba and Yambio (9 percent) but increased in Wau and Aweil, respectively by 14 and 18 percent, mainly due to the unseasonal rains which impacted the transport costs. Yambio had the lowest maize price, at SSP 200 per 3.5 kgs while Rumbek and Kapoeta South had the highest maize price, at SSP 450.

#### **Pulse prices**

- Field beans prices decreased in Juba, Yida and Renk markets and remained the same in Wau, Rumbek and Kapoeta South as compared with the last month. These price trends were associated with seasonal price transmissions from Uganda. However, field beans prices increased significantly in Bunj (25 percent) compared to October 2019. A kg of field beans fetched the highest in Bunj, at SSP 800 and the least in Yambio, at SSP 300.

#### **Vegetable Oil and Sugar Prices**

- The retail price of vegetable oil remained the same almost in all reference markets as compared to October 2019. However, the prices of vegetable oil increased in Yida and Bunj by 12 percent and 22 percent, respectively. A litre of vegetable oil fetched the lowest price in Kapoeta South, at SSP 293 and the highest in Bunj, at SSP 1467, which is five times higher than the lowest price.
- In November, the prices of sugar showed mixed behavior: dropped in Juba (6 percent) and Mingkaman (14 percent); remained stable in Yida, Rumbek, Mingkaman, Melut, Kapoeta South and Bentiu; and increased in Bunj (33 percent), Wau (17 percent) and Aweil (13 percent).

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<sup>1</sup> Aweil, Bentiu, Bunj, Juba, Kapoeta South, Mingkaman, Melut, Renk, Rumbek, Wau, Yida

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#### Fuel Prices

- Generally, the retail prices of petrol either dropped or remained the same in most of the reference markets. On the other hand, diesel price dropped slightly in 30 percent of markets and remained stable in other monitored markets (see Annex 1).

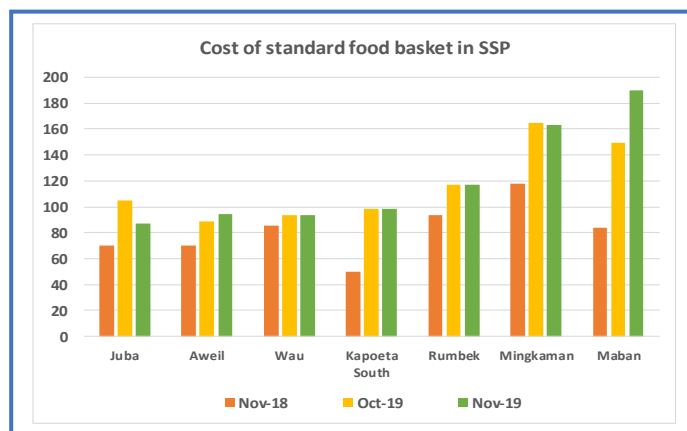
#### Purchasing power

- In November, goat to sorghum terms of trade improved in Juba (25 percent) but remained stable in Wau and Rumbek compared to October 2019. The improvements in ToT were associated with seasonal drop in prices of staple cereal. On the contrary, the purchasing power of livestock keepers dropped in Bunj (21 percent) and Mingkaman (9 percent) due to high cereal price and drop in goat price, respectively. One average size goat fetched the highest in Juba (219 kgs of sorghum) and the lowest in Bunj (44 kgs). Generally, the terms of trade stood below last year and a three-year average.

#### Implication of price changes

##### Standard food basket<sup>2</sup>

- The average price of a standard food basket remained stable in Aweil, Wau, Kapoeta South, Rumbek and Mingkaman. The cost of standard food basket dropped in Juba by 17 percent. Assuming incomes remained the same, the stability in cost of food basket would enable households to purchase the same amount of food as last month. However, it has increased in Bunj/Maban by 27 and 127 percent as against October 2019 and November 2018, which jeopardizes access to basic food and non-food commodities by many poor and very poor households.



#### Markets of concern

- Bunj market had the highest price of food commodities. Furthermore, this market has experienced successive price increases in the past four months. Furthermore, there was deterioration of terms of trade between goat and cereal. As a result, Bunj/Maban remains as a market of concern.

#### Outlook

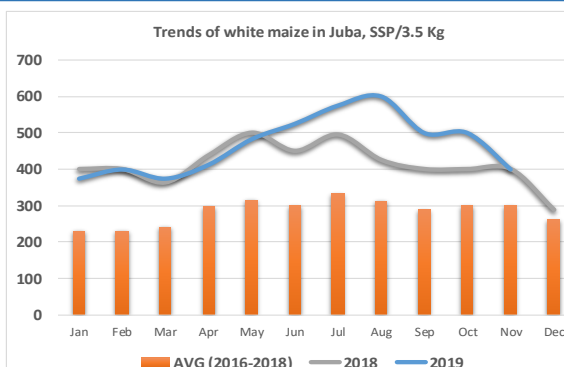
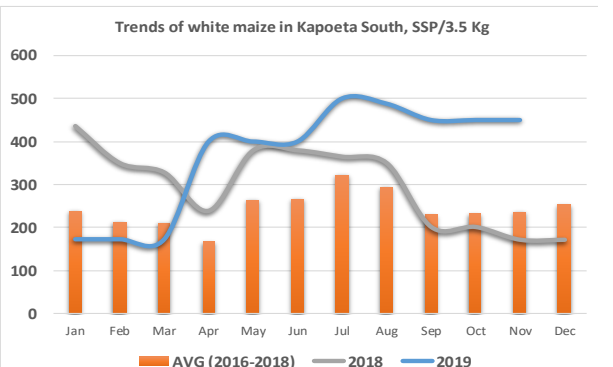
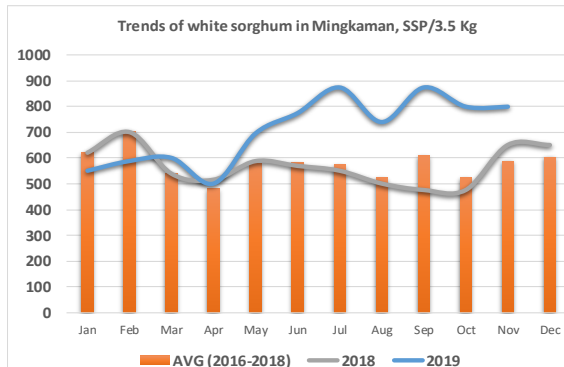
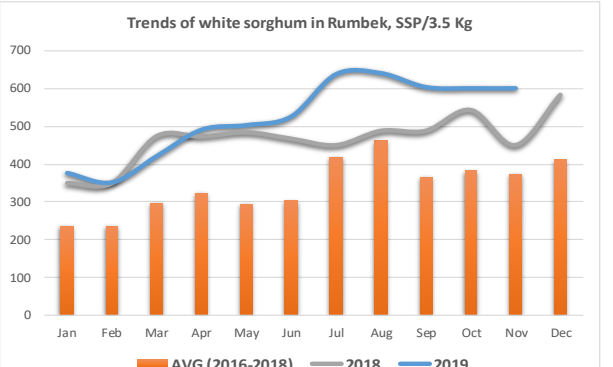
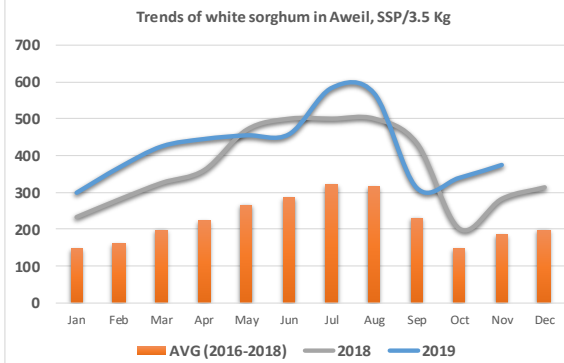
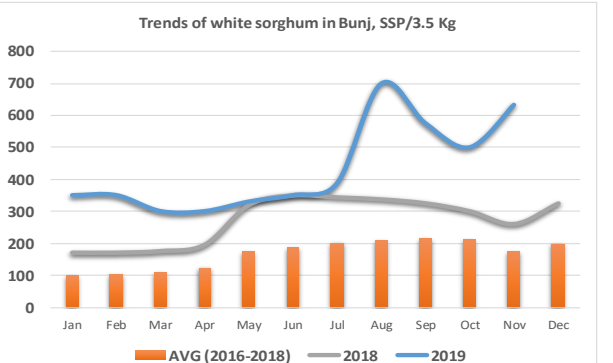
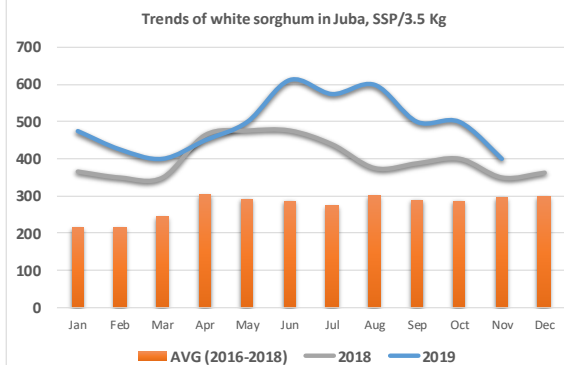
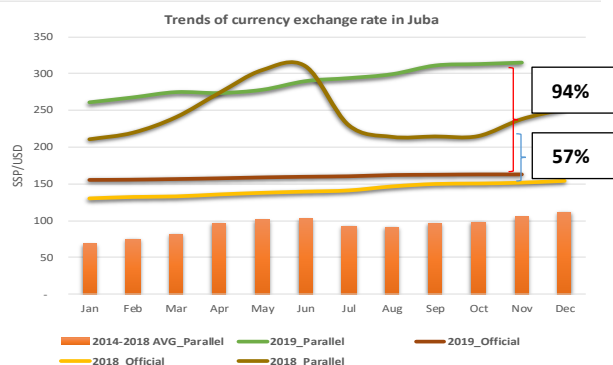
The outlook depends on the development of the revitalized peace agreement. The progress in the economic environment, specifically the exchange rate also matters for the outlook. On the other hand, the upcoming Christmas and New Year festivities are expected to increase demand for food and non-food items, mainly in urban centers. However, the economic crisis had devastated purchasing power of many households, and the impact of festivities on demand is expected to be minimal. Other things remaining the same, the seasonal price stability would likely continue in many markets in the coming two to three months. On the contrary, if the local currency significantly depreciates, prices of imported food commodities are likely to increase.

<sup>2</sup> The cost of food basket includes 500gms cereal, 50gm of pulse, 30gms of cooking oil and 5gms of salt.

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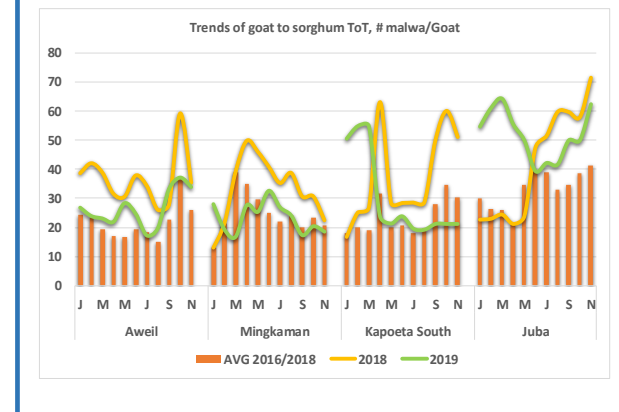
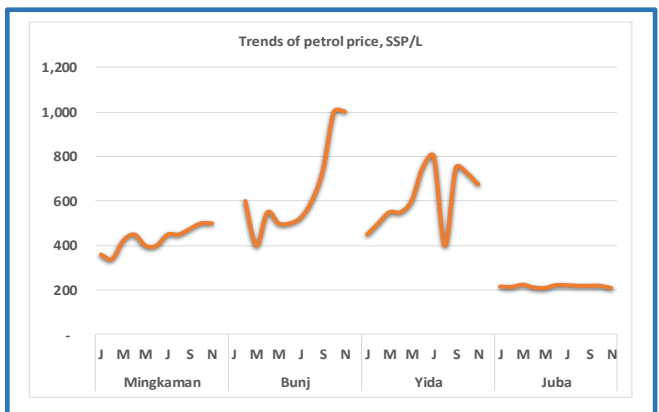
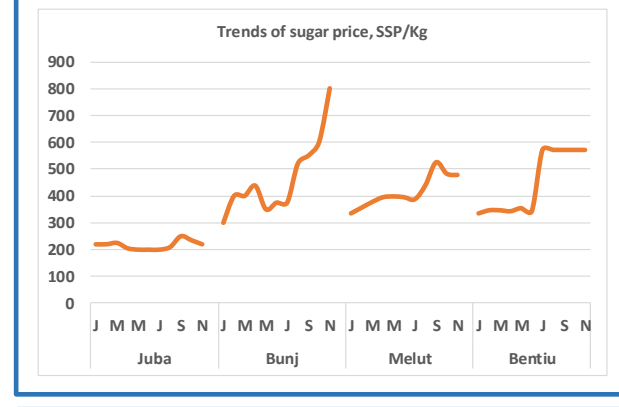
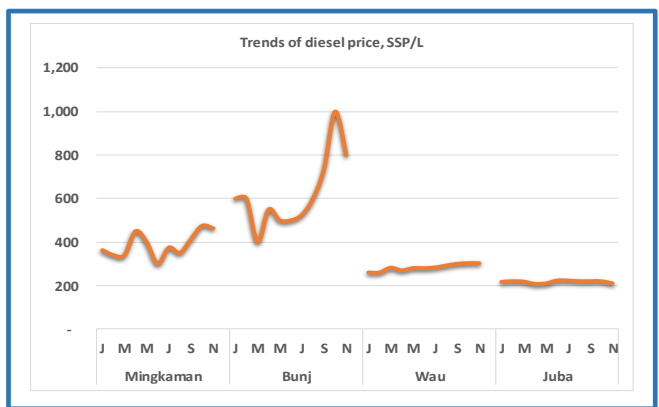
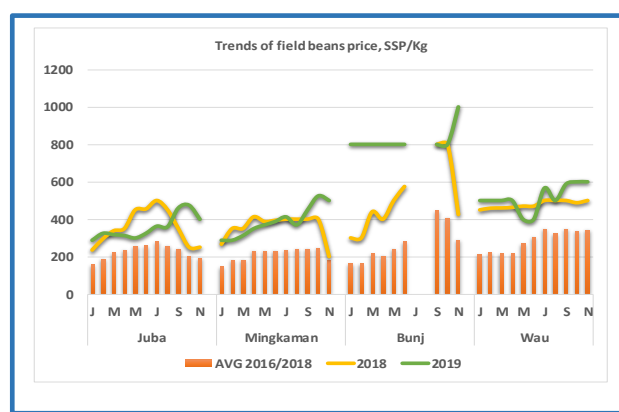
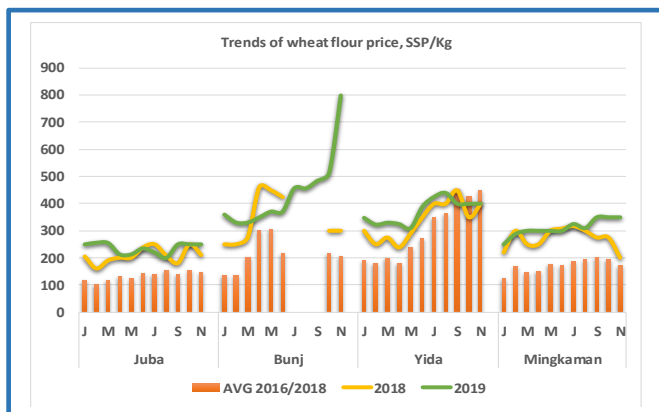
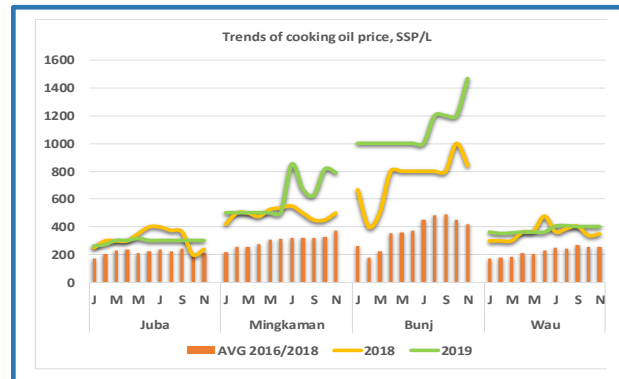
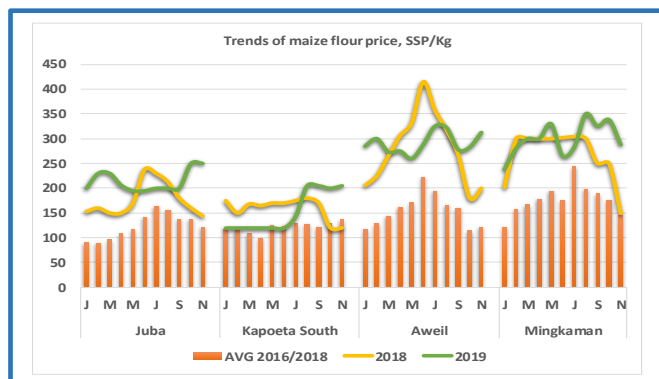
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**ANNEX 1: Lowest and Highest Commodity Prices and Percent Changes – November 2019**

	Lowest Price			Highest Price		
	Market	Price (SSP)	M-on-M Change (%)	Market	Price (SSP)	M-on-M Change (%)
White sorghum (3.5 KG)	Yida	270	8	Mingkaman	800	0
White maize (3.5 KG)	Yambio	200	-9	Rumbek	450	0
Maize flour (KG)	Kapoeta South	205	3	Bunj	700	4
Wheat flour (KG)	Juba	250	0	Bunj	1000	56
Field beans (KG)	Yambio	300	0	Bunj	800	25
Cooking oil(L)	Kapoeta South	293	4	Bunj	1467	22
Sugar (Kg)	Rumbek	200	0	Bunj	800	33
Diesel (L)	Juba	210	-5	Bunj	800	-20
Petrol(L)	Juba	210	-5	Bentiu	1000	0
TOT: Goat to sorghum (malua)	Bunj	13	-21	Juba	63	25
TOT: Wage to sorghum (malua)	Kapoeta South	0.67	0	Juba	3.75	25

Malua is equivalent to 3.5 Kgs



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Annex 2. Nominal Retail Prices of Commodities by Markets and Percent Changes – NOVEMBER 2019

	Commodity	SSP	Price Changes (%)							Commodity	SSP	Price Changes (%)						
		Nov	1M	1Y	3Y AVG	1M	1Y	3Y AVG			Nov	1M	1Y	3Y AVG	1M	1Y	3Y AVG	
White Sorghum (3.5Kgs)	Juba	400	-20	14	36	▲	▲	▲	Vegetable Oil (L)	Juba	300	0	25	42	▲	▲	▲	
	Aweil	375	10	33	102	▲	▲	▲		Aweil	485	-2	43	131	▲	▲	▲	
	Mingkaman	800	0	23	36	▲	▲	▲		Mingkaman	788	-3	58	114	▲	▲	▲	
	Yida	270	8	1	42	▲	▲	▲		Renk	800	0						
	Rumbek	600	0	33	61	▲	▲	▲		Rumbek	338	4	-8	39	▲	▲	▲	
	Melut	525	16			▲				Wau	400	0	14	56	▲	▲	▲	
	Bunj	633	27	143	267	▲	▲	▲		Yida	950	12	25	58	▲	▲	▲	
	Renk	388	7			▲				Bunj	1467	22	75	253	▲	▲	▲	
	Wau	353	1	1	33	▲	▲	▲		Kapoeta South	293	4	52	71	▲	▲	▲	
White Maize (3.5kgs)	Juba	400	-20	0	33	▲	▲	▲	ToT (Goat to Sorghum) Malua/Goat	Kapoeta South	21	0		-31	▲		▲	
	Aweil	365	18	44	123	▲	▲	▲		Aweil	34	-9	-4	30	▲	▲	▲	
	Rumbek	450	0	8	38	▲	▲	▲		Rumbek	21	0	-27	22	▲	▲	▲	
	Wau	400	14	0	45	▲	▲	▲		Mingkaman	18	-9	-17	-11	▲	▲	▲	
	Kapoeta South	450	0	165	92	▲	▲	▲		Wau	22	0	20	54	▲	▲	▲	
	Yida	295	-2	9		▲	▲	▲		Juba	63	25	-13	52	▲	▲	▲	
	Yambio	200	-9	7		▲	▲	▲		Bunj	13	-21			▲			
Cassa va Flour (3.5K)	Juba	500	0	47	60	▲	▲	▲	ToT (Wage to Sorghum) # Malua/Daily wage	Juba	3.75	25	183	264	▲	▲	▲	
	Wau	300	-18	-43	-5	▲	▲	▲		Aweil	2.63	5	48	178	▲	▲	▲	
Wheat Flour (Kg)	Renk	413	3	65		▲	▲	▲		ToT (Wage to Sorghum) # Malua/Daily wage	Wau	3.40	-1	138	259	▲	▲	▲
	Juba	250	0	19	68	▲	▲	▲			Rumbek	0.92	0	-41	-2	▲	▲	▲
	Melut	625	11			▲			Yida		1.85	-7	24	68	▲	▲	▲	
	Aweil	320	10	26	92	▲	▲	▲	Kapoeta South		0.67	0	-62	-49	▲	▲	▲	
	Mingkaman	350	0	75	102	▲	▲	▲	Bunj		0.79	32	-32		▲	▲	▲	
	Bunj	800	56	167	289	▲	▲	▲	Mingkaman		1.05	16	13		▲	▲	▲	
	Rumbek	333	4	19	26	▲	▲	▲	Fuel-Petrol (L)		Aweil	380	8	-16	34	▲	▲	▲
	Wau	300	0	28	110	▲	▲	▲			Renk	400	-6			▲		
	Kapoeta South	265	0	33	93	▲	▲	▲			Wau	314	-2	10	43	▲	▲	▲
Yida	400	0	0	-10	▲	▲	▲	Yida		675	-7	62	88	▲	▲	▲		
Melut	625	11	56		▲	▲	▲	Mingkaman		500	0	11	64	▲	▲	▲		
Field beans (kg)	Bentiu	571	0	77	110	▲	▲	▲		Rumbek	400	0	14	66	▲	▲	▲	
	Juba	400	-16	60	108	▲	▲	▲		Juba	210	-5	11		▲	▲	▲	
	Aweil	495	6	25	82	▲	▲	▲		Bunj	1000	0			▲			
	Wau	600	0	20	75	▲	▲	▲		Kapoeta South	260	0	8	85	▲	▲	▲	
	Rumbek	415	0	13	86	▲	▲	▲	Fuel-Diesel (L)	Aweil	430	1		91	▲		▲	
	Mingkaman	500	-5	150	172	▲	▲	▲		Kapoeta South	250	0	9	81	▲	▲	▲	
	Renk	800	-20			▲				Mingkaman	463	-3	54	96	▲	▲	▲	
	Yida	600	-7	26	173	▲	▲	▲		Wau	303	0	6	55	▲	▲	▲	
	Bunj	1000	25	135	244	▲	▲	▲		Juba	210	-5	8	-6	▲	▲	▲	
Yambio	300	0	50		▲	▲	▲	Bunj		800	-20			▲				
Kapoeta South	500	0	25	103	▲	▲	▲	Rice (kg)	Aweil	480	12	33	97	▲	▲	▲		
Maize Flour (kg)	Mingkaman	288	-15	92	98	▲	▲		▲	Mingkaman	400	14	100	117	▲	▲	▲	
	Juba	250	0	74	105	▲	▲		▲	Rumbek	260	0	-22	22	▲	▲	▲	
	Rumbek	265	6	-9	9	▲	▲		▲	Wau	400	0	33	88	▲	▲	▲	
	Kapoeta South	205	3	71	52	▲	▲		▲	Kapoeta South	263	0	32	77	▲	▲	▲	
	Wau	300	0	33	82	▲	▲		▲	Juba	300	0	20	35	▲	▲	▲	
	Aweil	313	10	56	158	▲	▲	▲	Salt (kg)	Aweil	330	-8			▲			
	Yida	375	14	-20	30	▲	▲	▲		Bunj	1000	133			▲			
Sugar (kg)	Aweil	345	13	28		▲	▲	▲		Wau	300	0			▲			
	Bunj	800	33	160		▲	▲	▲		Kapoeta South	68	-31			▲			
	Wau	350	17	67		▲	▲	▲		Juba	120	0			▲			
	Kapoeta South	250	0	25		▲	▲	▲		Rumbek	150	0			▲			
	Juba	220	-6	-8		▲	▲	▲		Mingkaman	200	-20			▲			
	Renk	345	-5	0		▲	▲	▲										
	Malakal	0	0	0		▲	▲	▲										
	Rumbek	200	0	-29		▲	▲	▲										
	Bentiu	571	0	0		▲	▲	▲										
Above normal price increases			▲						Below normal price decreases								▼	
Price fluctuation is normal if the price changes by <= 5% compared to one month, <=20% compared to one year, and <= 30% compared to three year average																		