



Ministry of Agriculture, Forestry, Cooperatives
and Rural Development
Republic of South Sudan



A New Path Forward: Agriculture and Food Security Strategy for South Sudan

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Presentation Outline



- Objectives
- Introduction to Agriculture in South Sudan
 - Important facts
 - Agriculture Potential
 - Trends and challenges
 - The Vision and Mission
- Our Path Forward
 - Targets and guiding principles
 - National Strategy for Growth
 - Other Key Government Actors
- An Update on Actions and Possible Partnership
 - Policy Actions: Boosting Investment in Agriculture
 - Areas of Possible Partnership
- Feedback and Discussion

Objectives

- Introduce South Sudan
- Present both the potential and challenges facing South Sudan's agricultural sector
- Examine the trends and causes behind South Sudan's struggle with achieving food security
- Outline our emerging plan for agricultural transformation
- Encourage partnership with multilateral, bilateral, and private sector stakeholders for investment and grants



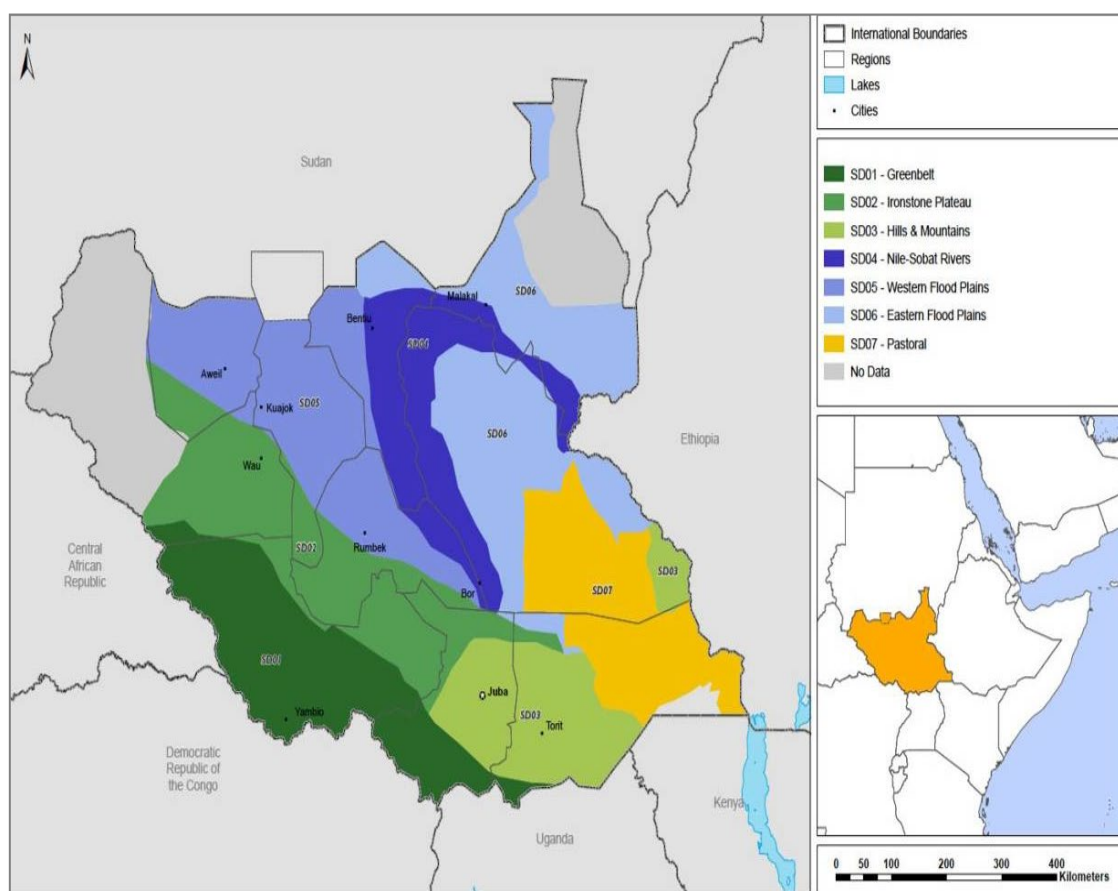
Introduction to South Sudan: Important facts



- Became independent on July 9, 2011, after years of conflict with Sudan
- Land area: approx. 650,000 sq. km
- Population (est.): approx. 8.26 million (2008 census)
- Low population density (13 people per sq. km)
- High population growth rate (3%)

Introduction to South Sudan: Agriculture Potential

- South Sudan has seven distinct rural livelihood zones
- Farming systems are mostly small-scale subsistence and traditional agriculture



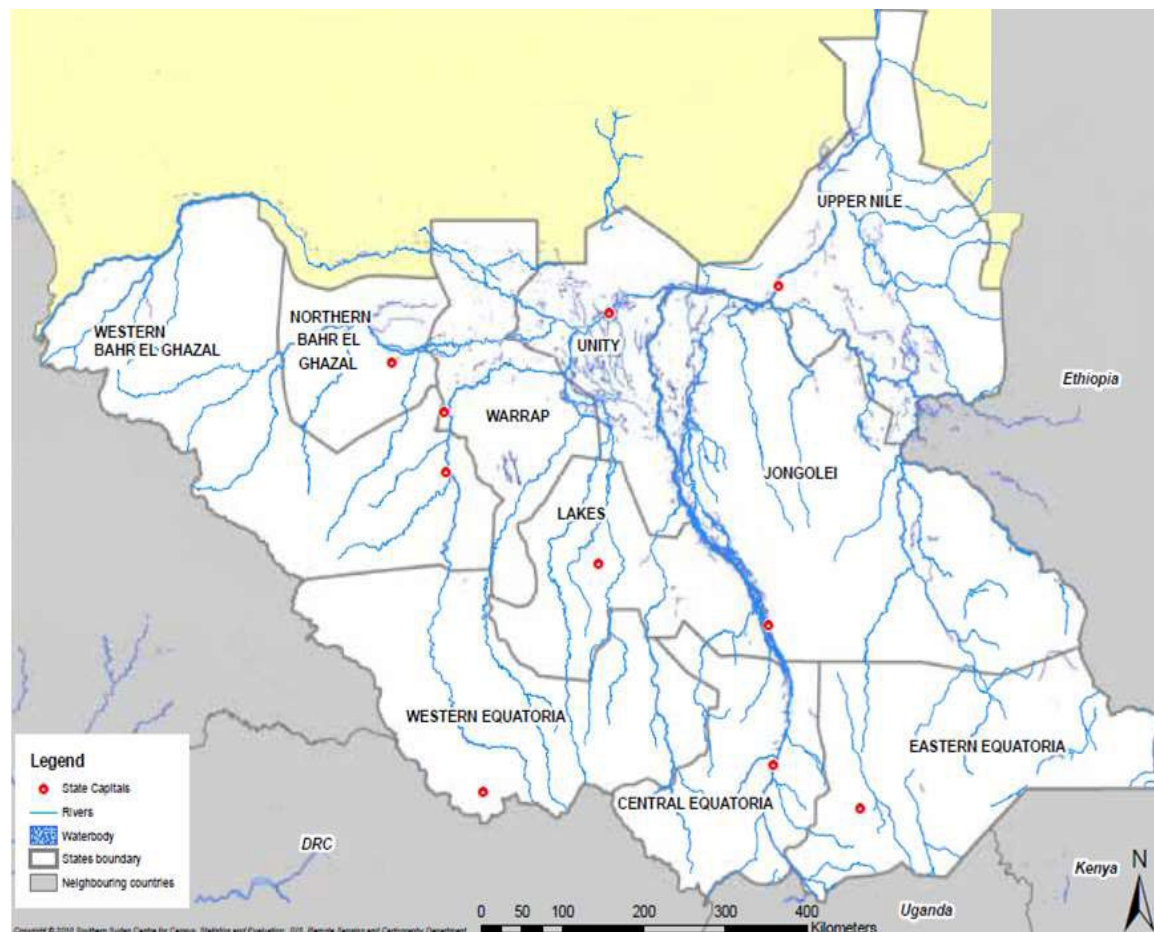
Introduction to South Sudan: Agriculture Potential



A strong opportunity

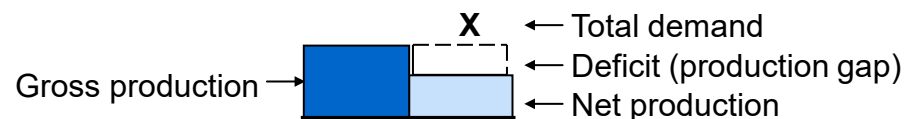
- > 95% of South Sudan's 650k km² is suitable for agriculture
- 50% is prime agriculture land with soils and climates suitable for a wide variety of food and cash crops. However, only 4% of prime land is under cultivation (mostly rain-fed)
- 29% of the land is under forest cover – rich in timber and non-timber resources
- 80% of the population in South Sudan is rural, with 45% agro-pastoralist, 35% agrarian, 12% fishermen, 8% others
- South Sudan has the sixth biggest herd in Africa (11.7m cattle, 12.3m sheep, and 12.6m goats), and the national cattle herd structure is 70% female

Introduction to South Sudan: Agriculture Potential



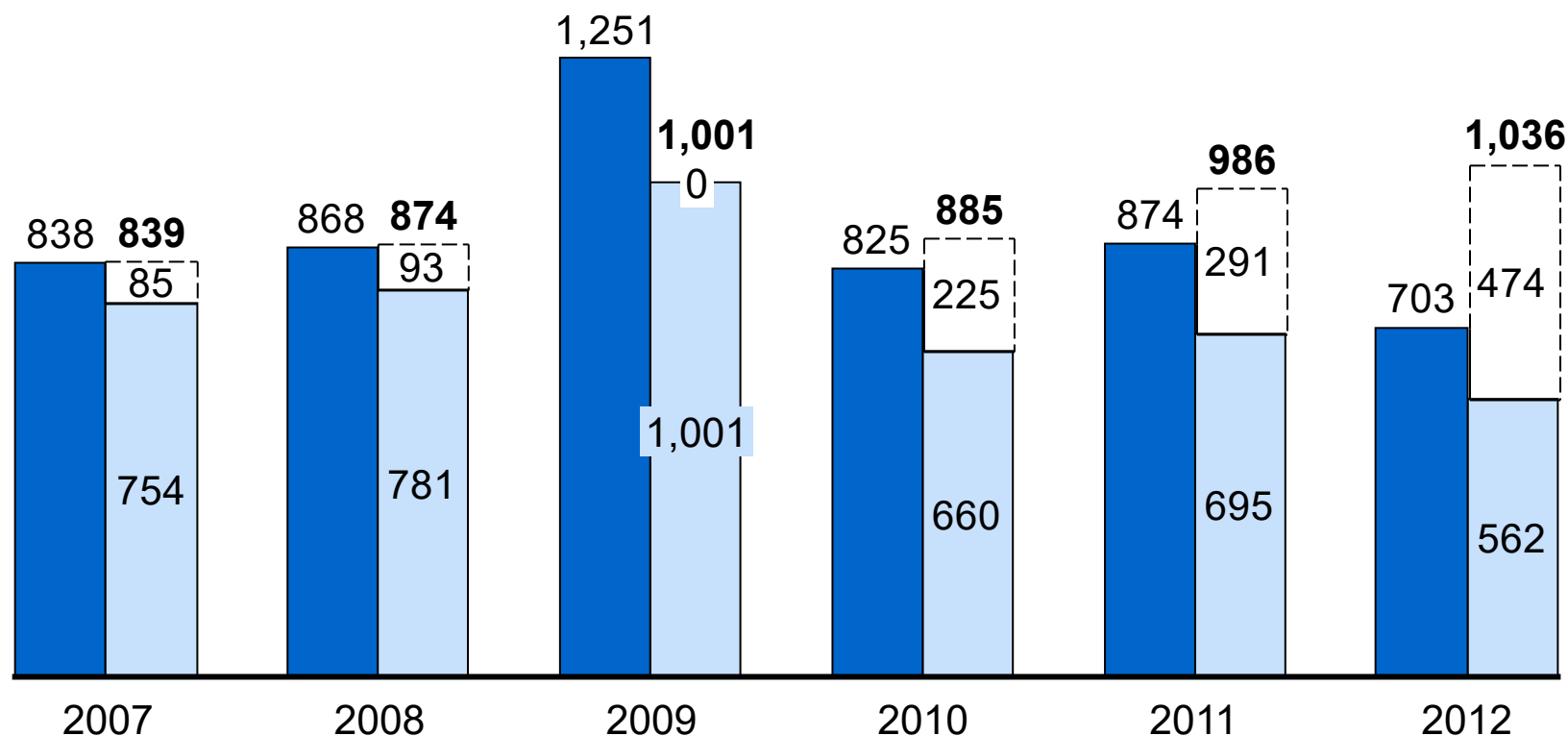
- Abundant water sources (many rivers and tributaries)
- High rainfall running 9 months a year – average rainfall ranges from 500 mm to 2000 mm per year
- High potential for irrigated agriculture – at present less than 3% of cultivated land is irrigated
- High potential for rice and other water-intensive crops
- Potential for fish harvest is up to 300k tons/year

Despite this potential, South Sudan's production gap has been rising in recent years



South Sudan cereal production gap – rising to almost 50% of demand in 2012¹

Metric tonnes ('000 t) – approximate figures



¹ Figures represent that year's consumption (and therefore, previous year's production)

SOURCE: FAO/WFP Crop and Food Security Assessment Missions; Oxfam



Challenges



South Sudan faces many challenges in achieving a successful agricultural transformation; there are many different reasons, including but not limited to:

- Inadequate capacity:
 - Low **human capacity** for policy for formulation, implementation, and evaluation of policies, including management and execution
 - Lack of **institutional capacity** to implement food security programs (e.g., crop forecasting, early warning, disaster management, etc)
 - Poor **infrastructure capacity** (roads, markets, storage, etc.)
 - Weak **research capacity** (e.g., ability to conduct basic research on technology development, adaptation, and dissemination, leading to limited access to agricultural technology and inputs)
- Inefficient farming practices, poor post harvest handling and storage availability, and limited irrigation practices
- Private sector investment in agriculture is low, leading to high dependence on government budget (even though <5% of national budget is spent on agriculture)

Several other issues have also compounded the challenges

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Continued unrest in Sudan has led to an influx in refugees

- ~165,000 refugees from Sudan (Blue Nile, Kordofan)
- ~110,000 displaced from Abyei

4

Economic challenges hurting ability to purchase food

- Due to oil shut-off and border closures, inflation spiked at times as high as 50%

1

Erratic rainfall – droughts in 2011, flooding in 2012 in parts of Jonglei, Eastern Equatoria, and Northern Bahr-el-Ghazal states

- Led to a 25% lower cereal harvest and high post harvest losses than the past 5 years

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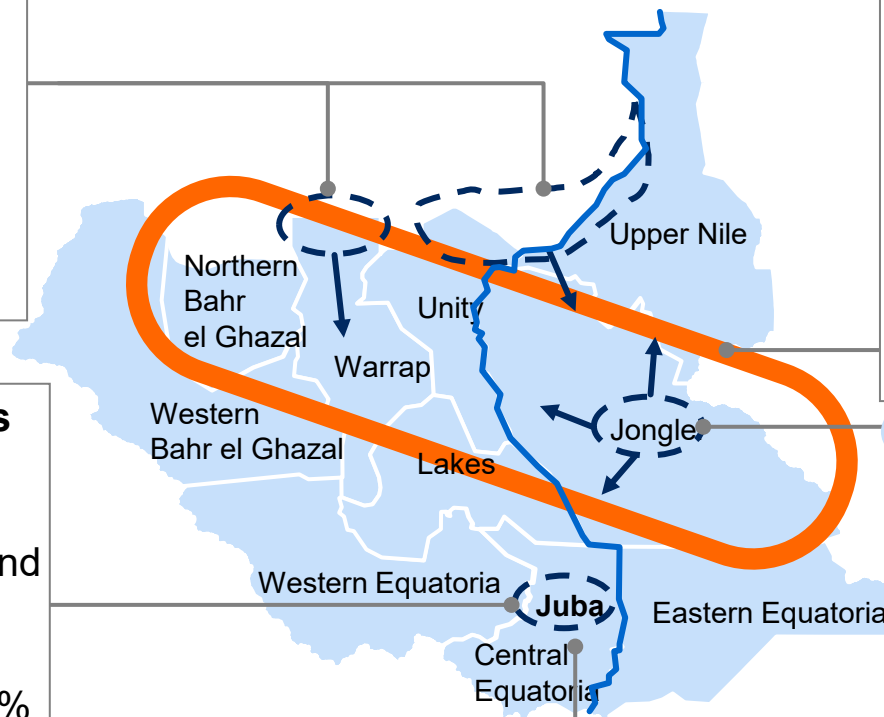
Internal conflicts in Jonglei

- Disrupted livestock movements, crop production, and access to markets

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Returnees struggling to re-settle and farm

- Close to 1.6m have returned since 2010, but many are struggling to resettle and start farming, compared to non-returnee South Sudanese



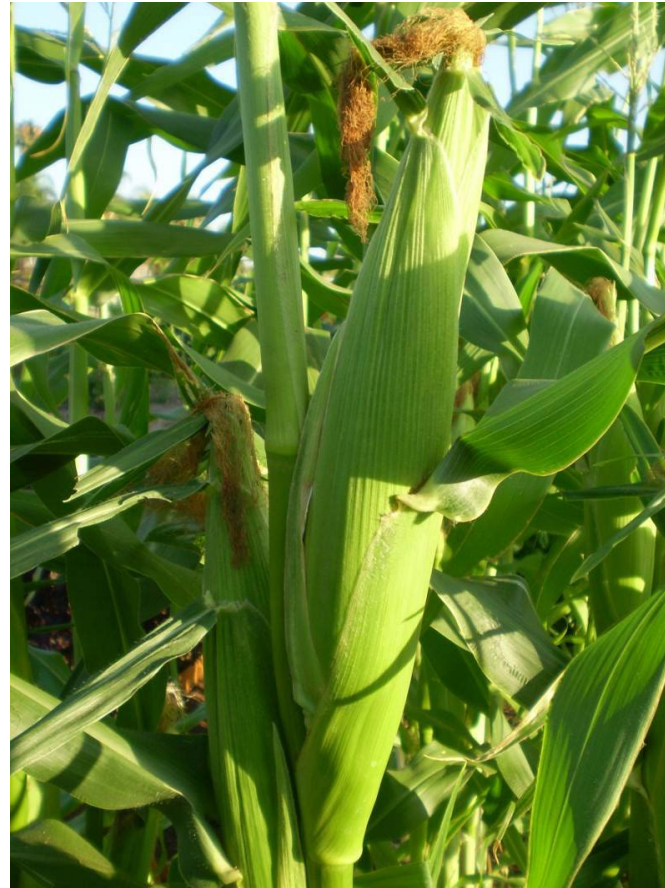
Vision and Mission

Vision:

Food security for all the people of the Republic of South Sudan to enjoy improved quality of life, environment, and economic prosperity

Mission:

To create an enabling environment for the transformation of agriculture into a modern, market oriented and economically sustainable system



The Agriculture Sector Policy Framework - targets and guiding principles for 2012-2017

Overall objective: Food security for all the people of South Sudan

Targets

- More than doubled cereal production from 700k to 1.5m metric tonnes / year
- Cropland increased from 3.8% (2.7 m ha) to 14.2 % (9.2 m ha) of total land
- Per capita cropland from 0.32 to 0.99 ha
- Annual increase of more than 20% for roots and tubers, more than 30% for cereals and more than 25% for horticultural crop
- Increased average yield of cereals from 0.9 tons per ha to 3 tons per hectare
- Rural poverty reduced by ~20% from the baseline levels of 55.4% in 2017

Guiding principles

- Conducive policies for agricultural growth
- A policy of low inflation, stable exchange rates and favorable trade and market environment
- Decentralized service delivery and participatory development
- All-inclusive extension approach
- Promotion of PPPs
- Mobilization of coops and FBOs, including sustainable agricultural production
- Promoting value addition and processing
- Strengthening rural infrastructure, especially roads
- Managing and protecting forest resources
- Government acting as the orchestrator



Our Path Forward: National Strategy for Growth (1)

- **Emphasis on Agricultural Policies**
 - Identify and prioritize policies that quickly boost agricultural production
- **Development of Rural Infrastructure**
 - Improved access to markets and other rural infrastructure through rehabilitation and expansion of rural infrastructure including feeder roads, storage, and markets
 - Build storage facilities and train in post harvest handling
- **Encourage market-led private sector participation in agriculture**
 - Mobilize, organize, and support farmers, entrepreneurs, and investors
 - Building a stronger enabling environment for investment
 - Strengthening Cooperatives / Farmers' Organizations



Our Path Forward: National Strategy for Growth (2)

- **National Capacity Strengthening**

- Focus on capacity building at the central, state, and county-level public officials.
- Continue supporting private sector enterprise development

- **Credit Facilities for Farmers**

- Development of credit institutions (e.g. Agricultural Bank of South Sudan, Cooperative Bank of South Sudan and Agricultural Credit guarantee schemes)
- Development of micro credit institutions (e.g. Sumi)

- **Strengthen Research and Extension Services**



Other Key Government Actors in the Growth Strategy

Ministries	Mandates
Ministry of Roads and Bridges	Plan, develop, and maintain the critical road and bridge transport infrastructure for South Sudan
Ministry of Animal Resources and Fisheries (MARF)	Promote, regulate, and facilitate animal production, Fisheries, value-addition and access to markets and overall coordination and provision of policy and regulatory framework aimed at creating conducive environment for livestock and fisheries sector growth and investment in the country
Ministry of Water Resources and Irrigation (MWRI)	Develop policies, strategies, standards and guidelines for water resources management, development, and utilization



Policy Actions: Boosting Investment in Agriculture

I. Creating an Enabling Environment

- Sector-specific policy frameworks have been developed for agriculture, livestock, and fisheries
 - Central emphasis of these policies is on creating a clear and consistent policy and regulatory environment for investment and investors in agricultural sectors
 - The policy frameworks also emphasize public investments to improve rural infrastructure – such as feeder roads – and improved agricultural extension

II. Investment Facilitation

- The South Sudan Investment Authority has been created
- Systems are being developed to facilitate rapid business setup – for example, a one-stop-shop

III. Establishment of Agriculture Trade Fairs

- A yearly “agriculture trade fair” has been established, bringing in investors and farmers
- These fairs enable potential investors to meet government officials, potential South Sudanese counterparts, and better-understand the opportunities available



Areas of Possible Partnership

I. Capacity Building

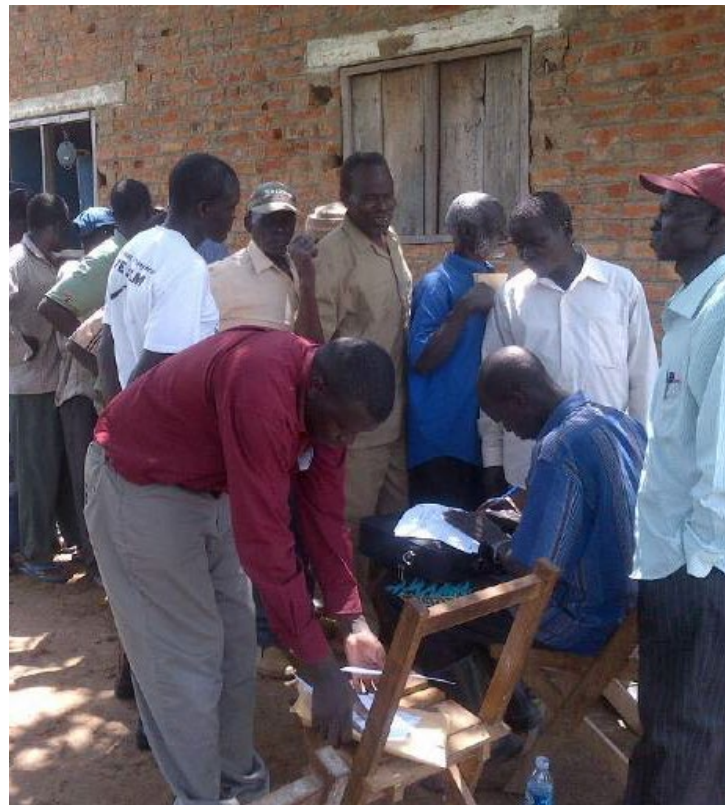
- Build/rehabilitate national research institutions
- Develop rural infrastructure (feeder roads, storage capacity)
- Strengthen/create rural institutions (e.g., agricultural extension and credit facilities)

II. Human Capital Investment

- Bi-lateral and multi-lateral donor support

III. Analytical Support

- Identify systemic constraints to agricultural development



Concluding Remarks

- The RSS is committed to transform agriculture but needs cooperation and partnerships with the international development community and donors for immediate and short term strategy
- Partnership and support is critical for attracting investments, building institutional and human capacity, as well as developing and implementing the National Growth Strategy
- Strengthen Research capacity as a long term strategy
- Help South Sudan find a new path, one that relies more on renewable sectors like agriculture than on its exhaustible resource— oil!



