



# Pibor Rapid Markets Assessment: Markets in Crisis

February 2021

## KEY FINDINGS

- Findings suggest that the combined shocks of insecurity and flooding have resulted in low market accessibility and limited market functionality across assessed marketplaces in Pibor county. This is exacerbated by poor road infrastructure within Jonglei State and the subsequent difficulty in transporting goods.
- Changes in road access, in the past two years, have limited various supply routes that were common in the area.
- High prices of commodities in Pibor appear to be driven by high transport costs resulting from reliance upon Juba as a supply market.
- Findings suggest that engagement in productive income-generating activities has declined in Pibor since 2019, reportedly due to the limited access to the main livelihood activities as a result of flooding and insecurity.
- As a result, purchasing power among the communities has decreased and engagement in alternative income-generating activities, such as fishing, charcoal making, and selling wild foods, cannot provide households with sufficient income.

## INTRODUCTION

In October 2020, 70% of the population of Pibor county was determined to be in at least crisis level food security conditions according to the Integrated Phase Classification (IPC), with 11,000 people reportedly facing catastrophic levels of food insecurity. IPC analyses projected that the percentage of the population in crisis conditions would climb throughout the dry season and early wet season to 85% in July.<sup>1</sup>

Within the county, and particularly the western payams, food insecurity has been driven by conflict and climatic shocks (Figure 1).<sup>2</sup>

Pibor County witnessed atypically severe flooding in both 2019 and 2020, exacerbated the worst year of violence recorded since the 2013 civil war (Figure 1).<sup>3</sup> In February 2020, armed clashes broke out in Lekongole and the surrounding areas, resulting in mass casualties, widespread displacement and the further disruption of lifesaving humanitarian service provision, right at the height of the lean season.<sup>4</sup>

In addition, the violence resulted in destruction of critical civilian infrastructure, including boreholes (often the only source of water), schools, markets, and shelters, as well as loss of livestock through raiding. The violence subsided around July, but was followed by flooding across many parts of the state, which reportedly decimated the remaining livestock holdings and forced populations to once again seek refuge.

Market systems have reportedly been negatively impacted by these shocks, with marketplaces in Pibor, Gumuruk and Lekuangle

facing widespread physical damage and limited access to supply routes.

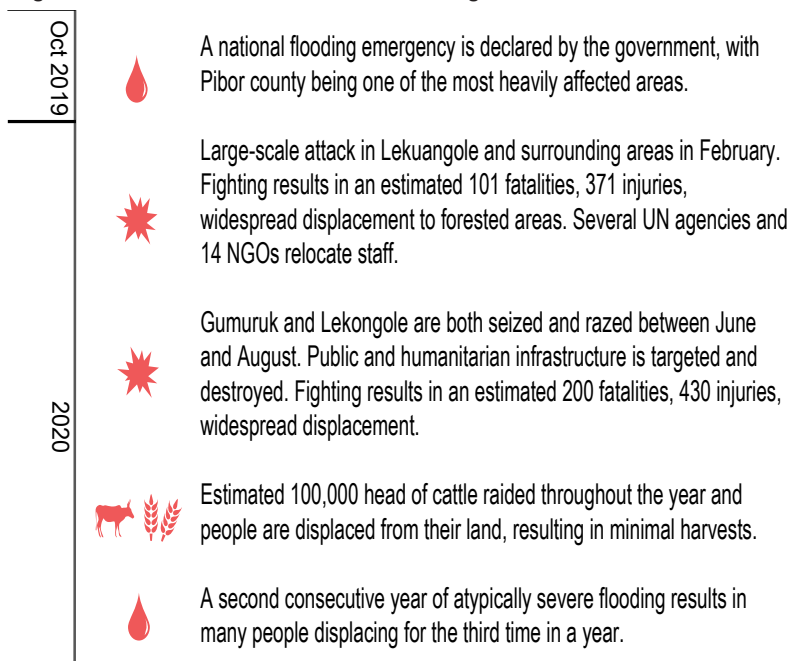
To assist humanitarian organisations to understand local market dynamics, REACH carried out a rapid market assessment in Pibor County, between the 10th and 18th of February 2021, which consisted of 6 focus group discussions (FGDs) with consumers, 5 FGDs with trade unions, additional informal key informant (KI) interviews with traders, local authorities and humanitarian partners, as well as direct observation. Directly assessed marketplaces include Pibor, Gumuruk and Lekuangle. These locations were chosen because of their importance to the overall market system in the region, and to adequately represent various sub-systems that exist within the region. Findings from the assessment are not generalisable with a known level of precision, and should be considered indicative only.

## MARKET SYSTEM

In the rainy season, movement around Pibor county is very limited due to poor road conditions, and Pibor Town typically receives imported goods via plane from Juba.<sup>5</sup> According to the Famine Review Committee (FRC), market access has been limited in Pibor County, both physically and financially, due to flooding and insecurity, which has also disrupted income-generating activities, such as cultivation and livestock rearing.

Pibor lies in the semi-arid pastoral zone with livelihoods centred around pastoralism.<sup>6</sup> In a normal year, trade in livestock and staple foods constitute one of the most important sources of income, making market access fundamental to food security. Hence any disruptions to market access can exacerbate households' vulnerability.

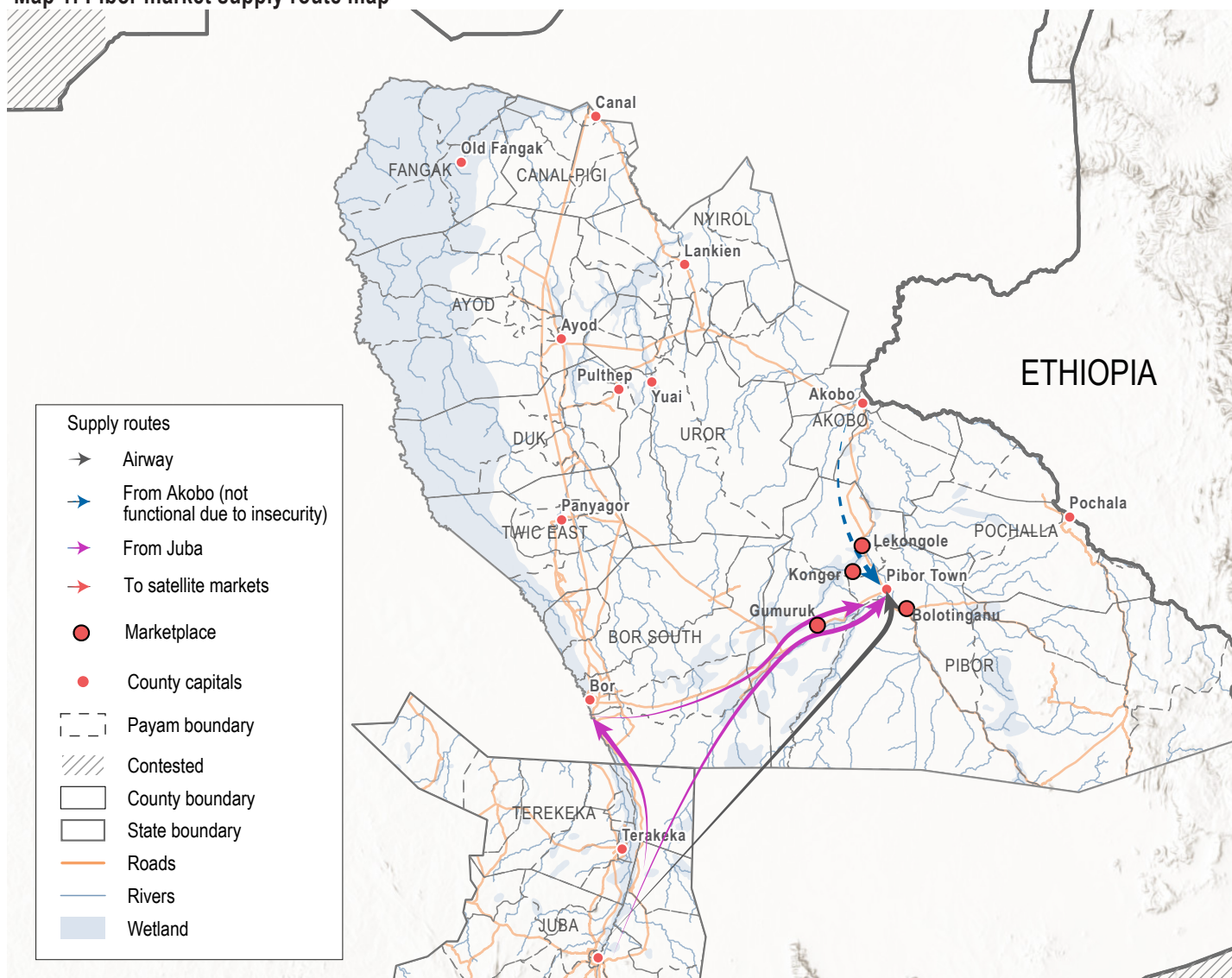
Figure 1: Timeline of conflict and flooding from 2019-2020





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Map 1: Pibor market supply route map



Prior to 2019, market access in the county was relatively good, with market purchases peaking during the lean season, and accessibility being only periodically hampered due to conflict limiting the flow of goods and reducing access by communities.<sup>7</sup>

In the past two years, changes in road access have limited supply routes that were common in the area.<sup>8</sup> The geographic setting of the county creates a natural barrier for supply of goods, with its abundant river basins and mountain ranges, and there is no direct route to Ethiopia from Pibor Town. Local traders reported that goods previously used to travel from Akobo (via Ethiopia) but the last time they received goods along this route was in 2019. This supply route was reportedly shut off due to the conflict patterns in 2020. As such, all goods in the marketplace in all seasons reportedly come from Uganda (via Juba) and travel either by commercial flight or pick-up trucks, which entails high transport costs for traders, which increases the cost of goods, especially the air route.

To get a better understanding of markets around Pibor County, it is essential to understand the flow of goods to Pibor town, as it remains the main redistribution centre for goods in the county.

There are two primary road routes to Pibor from Juba, either via Bor town, or directly via Gumuruk (see map 1). The road to Gumuruk is narrow and unmapped, however, KIs reported that this route is generally preferred, as there reportedly are fewer checkpoints and traders are less likely to face insecurity along the route. Traders reported being hesitant to use roads to transport goods due to the risk of conflict, especially between Bor Town and Pibor Town. At the time of assessment, traders were stocking sorghum for the wet season when the roads were open – however, they were only able to stock in very limited quantities due to the limited availability of finances, and reported their small stocks would be insufficient to cover the 9 month period during which goods can only be flown in due to the flood waters.

Considering the importance of markets as a food source in Pibor, reduced access to markets will likely have negative implications for food security among local communities.

## MARKET SHOCKS AND RESILIENCE

FGD participants reported floodings, conflict, raids and



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displacement (see Figure 1) have exacerbated existing market challenges and pushed some smaller rural markets to the brink of collapse.

Findings suggest that insecurity has limited supply routes as well as market access for communities, which is corroborated by findings from REACH's Area of Knowledge (AoK) assessment in November 2020.<sup>9</sup>

### Impact of Conflict and Insecurity

Findings suggest that trade in Pibor county continues to be negatively affected by insecurity, especially in Lekongole and Gumuruk. FGD participants reported trader numbers in Lekongole shrunk from 25 to 17 due to conflict, which brought many traders into poverty. This was reportedly because the traders could no longer sustain themselves nor maintain their shops. Instead, they were reported to have taken up other livelihoods means, such as fishing, and travelled to the most prominent fishing areas (such as Jaw). FGD participants reported that the effects of reducing number of traders has made it much more difficult for the remaining traders to restock goods – as traders previously would minimize risks by restocking goods through pooling funds, to reduce the cost and risks of transporting goods through insecure areas. However, with

the reduced number of traders, restocking is difficult and involves greater risks.

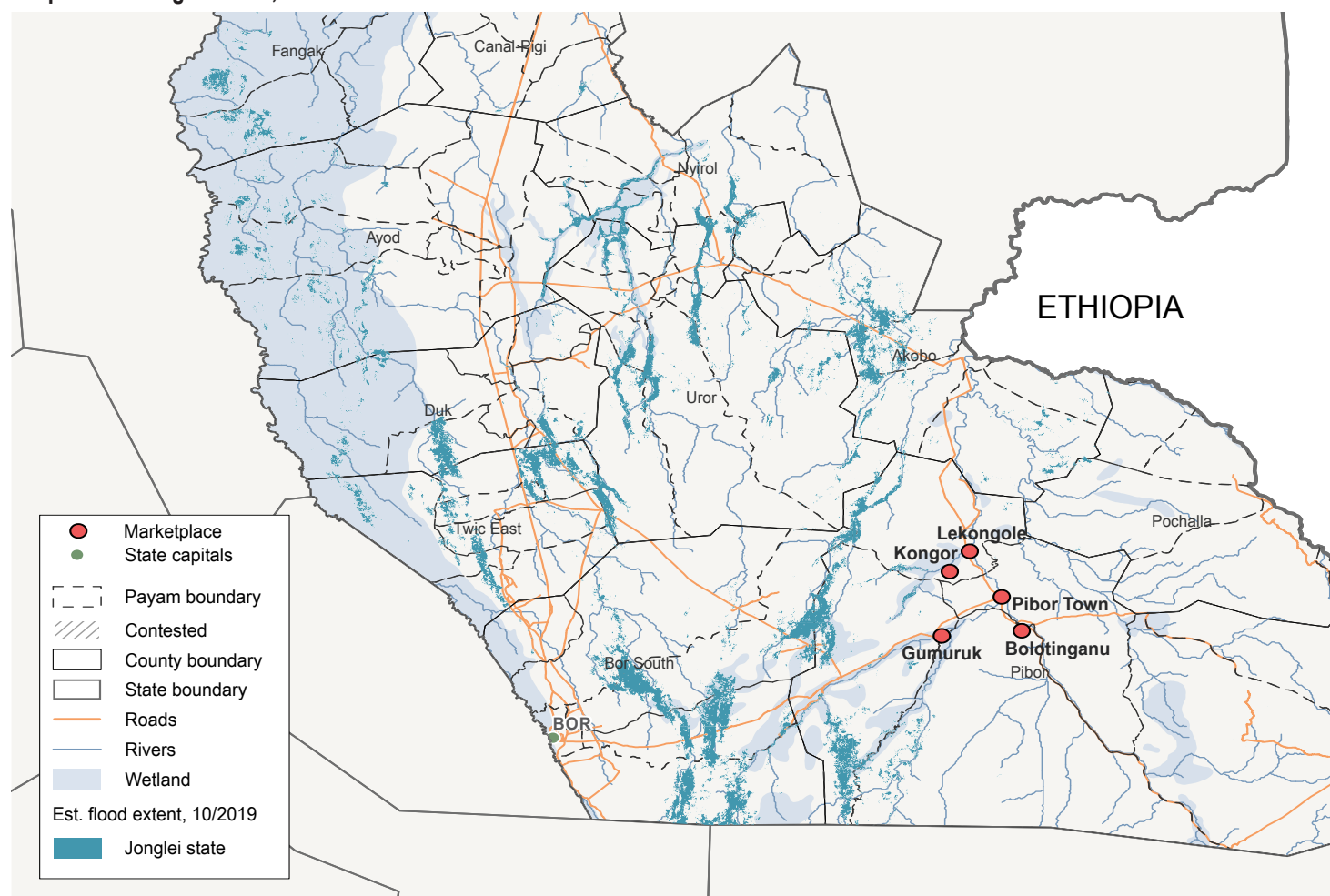
In Gumuruk, traders reported that many traders had either been killed or fled the settlement since the onset of the fighting. One trader who had just returned from Juba was reportedly too afraid for their safety to make the return trip in a vehicle. After renting a tractor in Juba to carry the goods to Gumuruk, the trader reportedly exited the vehicle near Mangalla and travelled the rest of the way by foot, leaving the driver to ferry the goods onwards to Pibor. It took the trader 8 days to navigate their way through the bush to Gumuruk.

### Impact of Flooding

Due to its geographic setting, Pibor has limited supply routes, with only two roads operational, which become inaccessible during the rainy season due to flooding, see Map 2. As a result of the flooding, FGD participants reported traders are forced to restock by air for nine to ten months of the year, from May to February. This is reportedly expensive and difficult to arrange.

Even more so, according to FGD participants, flooding can be so severe that the Pibor airstrip becomes inaccessible and goods have

Map 2: Flooding in Pibor, October 2019







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to be flown to Gumuruk, from where they have to be collected by traders from Pibor on canoes, increasing both the time required to restock as well as the transportation costs.

This, together with the reduced number of traders, have limited the ability of traders to pool sufficient capital, getting trucks from Pibor to Luakongole has reportedly become a challenge, especially with roads not functional due to flooding. With market functionality affected due to flooding, suppliers resort to buying goods from Juba, which are costly.

## Dual impact on market accessibility

Despite some traders lowering their costs to ensure a continuation of sales, findings suggest that flooding and insecurity have negatively impacted the financial accessibility of goods for local communities, with financial barriers emerging as a main constraint to market access, (as reported during the FGDs). At the time of the assessment in February 2021, one kilogram of sugar cost 2000 SSP in Pibor Town, over three times that national median price (650 SSP), as reported in the February Joint Market Monitoring Initiative Situation Overview.<sup>10</sup>

All the while, due to both flooding and insecurity, FGD participants commonly reported that the main income-generating activities before 2019, such as the sale of livestock and livestock products, are largely no longer available, greatly limiting access to cash. Few households reportedly have cash to purchase market goods. According to FGD participants, those households that do have cash are primarily those households who earn an income through employment with NGOs.

In addition, participants reported that alternative income-generating activities, such as selling wild foods, charcoal, firewood, fish, and shelter materials, are only sporadically employed as they are limitedly available and the energy required for such activities is reportedly often depleted after conducting daily chores. Moreover, participants reported that, given the limited availability of and access to cash in the communities, engagement in alternative activities would not generate sufficient income, further disincentivising households to engage in them.

## CONCLUSION

Markets in South Sudan are subject to highly localised and severe shocks, with market places in Pibor having been particularly affected by floods and insecurity. Findings suggest that, despite these shocks, major markets in Pibor generally find a way to remain operational, with traders usually pooling funds to restock supplies, mitigating high risks and costs. However, with reducing number of traders, it is reportedly increasingly difficult to restock goods. Traders have also had to take more extreme measures, such as lowering prices and undertaking difficult journeys through rural areas, to ensure market functionality, which makes it difficult to ensure a smooth flow of goods to ensure market sustainability.

Flooding has additionally limited supply routes, with goods often flown in from Juba, which increases the prices of goods and further slows down the restocking process.

Furthermore, coping with food insecurity has become increasingly difficult for local communities, with limited livelihood opportunities and reduced dependence on markets. Reduced dependence on markets can in turn effect supply of goods and ultimately hamper market functionality, leading to reduced functionality.

Rural marketplaces are presumably more likely to run out of a basic items altogether, due to the low number of traders and the additional challenges these traders face to transport goods to remote areas. Traders in rural marketplaces are often smaller in terms of volume than their urban counterparts and therefore tend to have less capital at their disposal for restocking. Traders' capital is further diminished by the need to provide food for their families, which reduces the amount of cash that can go towards restocking commodities.

With the onset of the rainy season, supply routes will likely remain disrupted due to poor road conditions. This, in turn, will affect availability of goods and can increase prices of goods. In light of this, cash programming is unlikely to be effective in areas where shocks have been this keenly felt - markets in those areas might not be able to cope with the demand and households might not get the required goods. However, findings suggest that cash programming could be effective if supplies are prepositioned to enable traders to adequately stock in the dry season for the wet season.

## ENDNOTES

1. [Integrated Food Security Phase Classification \(IPC\). IPC Famine Review. November 2020.](#)
2. [REACH Western Pibor Rapid Assessment Brief.](#)
3. Human Rights Council. Report of the Commission on Human Rights in South Sudan. February 2021.
4. The International NGO Safety Organisation (INSO). Jonglei State Profile. September 2020.
5. [Integrated Food Security Phase Classification \(IPC\). IPC Famine Review. November 2020.](#)
6. [Famine early warnings system \(FEWS NET\). 2018. Livelihoods Zone Map and Descriptions for the Republic of South Sudan. Washington, DC: FEWS NET.](#)
7. [ibid..](#)
8. [Conflict Sensitivity Resource Facility \(CSRf\) County Profiles.](#)
9. [South Sudan Areas of Knowledge \(AoK\) Situation Monitoring: November Assessment](#)
10. [South Sudan Inter Agency Cash Working Group \(IACWG\) Joint Market Monitoring Initiative, Dashboard.](#)