FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

#1 - March 2020

AGRA Growing Africa's Agriculture

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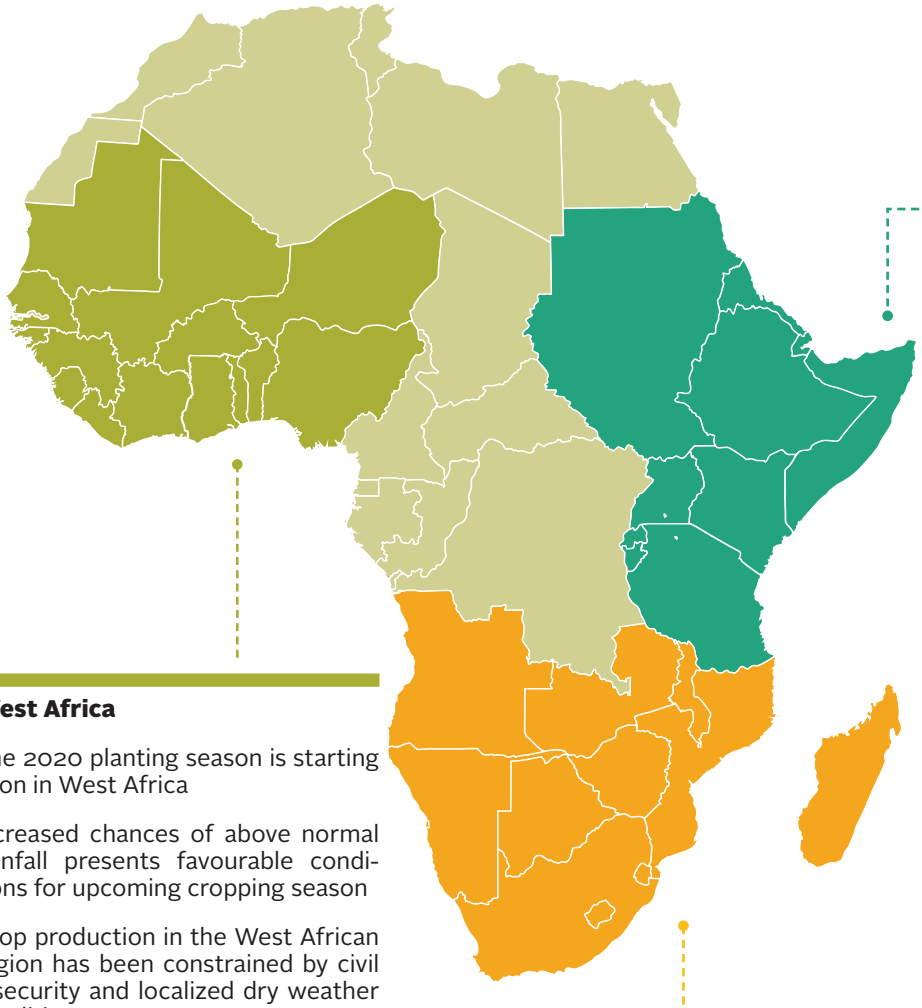
REGIONAL HIGHLIGHTS



West Africa

- The 2020 planting season is starting soon in West Africa
- Increased chances of above normal rainfall presents favourable conditions for upcoming cropping season
- Crop production in the West African region has been constrained by civil insecurity and localized dry weather conditions
- Restrictions of travel due to the COVID-19 pandemic affecting agricultural activities including food trade
- Panic behaviour across countries and uninformed government food export bans can potentially disrupt food trade and markets and push food prices up
- Private sector can implement innovative e-commerce interventions to help support governments in ensuring food supplies are moved from surplus areas to areas of need
- Prices of coarse grains have been relatively stable in Sahelian countries due to good supplies from the 2019 harvests except in conflict affected areas which face market disruptions and limited availabilities
- Conflict affected areas continue to experience market disruptions, low agricultural activities and displacements that are affecting movement of agricultural food commodities contributing to pushing prices up

Southern Africa

- Heavy rains in mid-January to early February improved 2020 harvests for parts of the region such as in Malawi and northern Zambia
- Below average rainfall for some areas (such as in Mozambique and Zimbabwe) created abnormal dry conditions and crop failures
- Localised food shortages expected in areas affected by poor seasonal rains
- Restrictions of travel due to the COVID-19 pandemic affecting agricultural activities including food trade
- Panic behaviour across countries and uninformed government food export bans can potentially disrupt food trade and markets and push food prices up
- Private sector can implement innovative e-commerce interventions to help support governments in ensuring food supplies are moved from surplus areas to areas of need

East Africa

- Higher chances of above normal rainfall in the March-May season favourable for upcoming cropping season
- Above normal rainfall forecast increases risks of flooding and landslides, post-harvest losses and spread of desert locusts
- The upsurge of desert locust that have affected many countries in the region raise concerns for food security in 2020
- Food security impacts of the desert locust upsurge expected to be significant for households in areas where swarms pass through and cause damages
- Restrictions of travel due to the COVID-19 pandemic affecting agricultural activities including food trade
- Panic behaviour across countries and un-informed government food export bans can potentially disrupt food trade and markets and push food prices up
- Private sector can implement innovative e-commerce interventions to help support governments in ensuring food supplies are moved from surplus areas to areas of need
- Prices of coarse grains declined in most countries in East Africa due to increased market supplies from second season harvest
- Despite price declines, current levels are well above a year earlier due to reduced main season harvest and heavy rains in late 2019 that disrupted agricultural and marketing activities

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- Mixed prices changes in the region in the past two months – prices relatively stable in Zambia while Malawi and Mozambique experienced increases
- Prospects of good harvests in areas that received heavy rains between mid-January and early February such as Malawi and northern Zambia expected to help push prices down

INTRODUCTION

This report presents an overview of the food security situation in selected countries in Eastern, Southern and Western Africa regions that are of interest to the Alliance for a Green Revolution in Africa (AGRA) and the Africa Food Trade and Resilience Initiative. The selected countries are: East Africa (Ethiopia, Kenya, South Sudan, Tanzania and Uganda), Southern Africa (Malawi, Mozambique and Zambia) and West Africa (Burkina Faso, Ghana, Mali, Niger, Nigeria and Togo). The report focuses on the following issues: overview of weather and climatic conditions, desert locust outbreak and impacts on food security and trade, review of government policy announcements that affect regional food trade, overview of prices of agricultural commodities, and an overview of the food security situation in each region. The implications on regional food trade are also discussed.

2. WEATHER/CLIMATIC CONDITIONS AND IMPACTS ON FOOD SYSTEMS AND TRADE

2.1 East Africa

Rainfall forecast for March to May (MAM) 2020 indicate increased rainfall and wetter conditions (above normal rainfall) for most parts of the East Africa region especially in western Kenya, south-western and eastern Uganda and western parts of South Sudan (Figure 1). Parts of central and north-eastern Ethiopia and Southern Tanzania indicate higher chances of drier than average conditions. The agricultural cropping season across the region will benefit from above normal rainfall forecast for March-May. This indicates good harvests prospects for the upcoming season and subsequent increases in food supply. The synthesis of crop conditions as of 28 February 2020 from Crop Monitor indicate favourable crop conditions except for parts of Ethiopia (Figure 2). The temperature forecast for the MAM season indicates higher chances of above average temperature for most parts of the region. Areas that have higher chances of experiencing warmer than average temperatures include: eastern Ethiopia, south-western Sudan, Somalia, and eastern Tanzania. March to May is an important rainfall season for the region. The higher chances of above-normal rainfall across the region is favourable for agriculture, however it increases risks of flooding and landslides, post-harvest losses and spread of desert locust (ICPAC, 2020)[1].

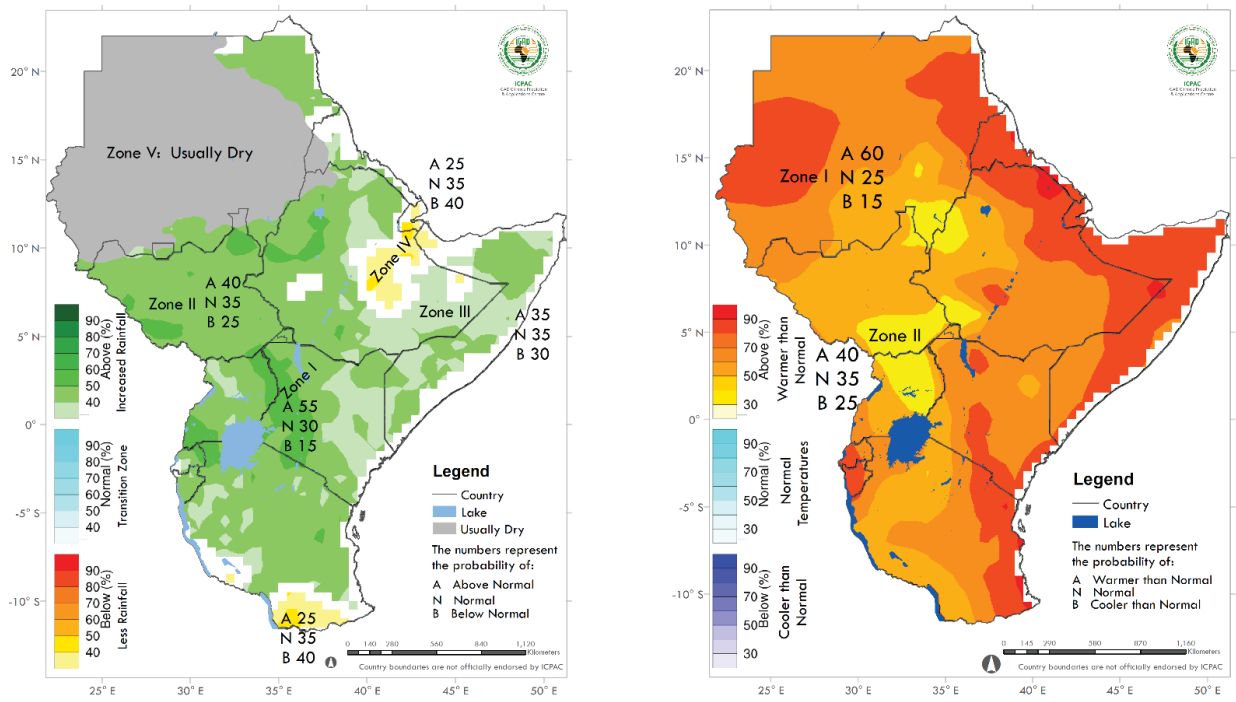


Figure 1: East Africa GHACOF54 - March to May 2020 Rainfall and Temperature Forecast
Source: ICPAC (2020)

[1] ICPAC. 2020. Seasonal forecast for March to May 2020, Summary for Decision Makers. ICPAC, IGAD Climate Prediction and Applications Centre

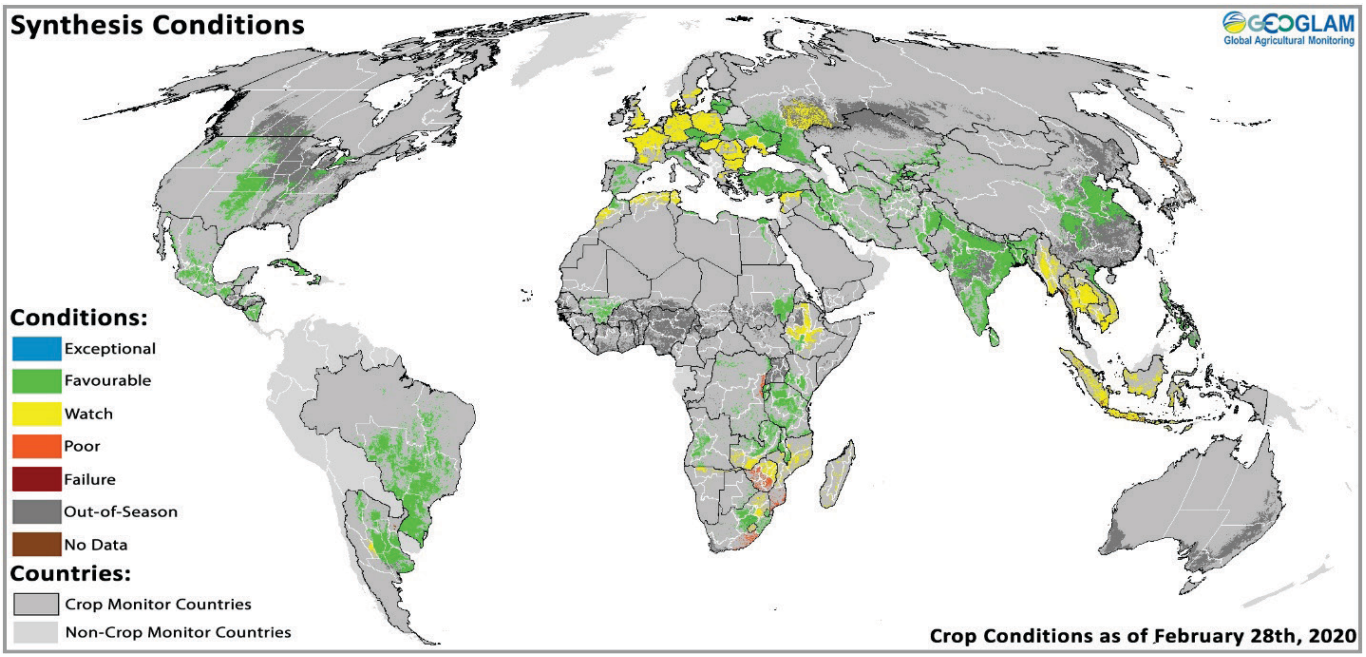


Figure 2: Crop conditions as of 28 February 2020
Source: https://cropmonitor.org/ Accessed 18 March 2020

2.2 Southern Africa

Most of the Southern Africa region experienced below-average rainfall in the beginning of the cropping season causing abnormal dryness. Affected parts of the region experiencing dry conditions include southern Mozambique, most parts of Zimbabwe, parts of Eswatini and South Africa. Heavy rainfall in March triggered flooding in Zambia (FEWSNET, 2020)[2]. Despite the drier conditions, most parts of the region experienced favourable rainfall from mid-January to early February that improved crop conditions where they had not yet wilted. The synthesis of crop conditions as of 28 February 2020 from Crop Monitor indicate that only Malawi, northern Zambia, parts of Angola and central South Africa had favourable cropping conditions (Figure 2) and are expected to get good harvests. The rest of the region show watch and poor conditions, particularly in Zimbabwe and Mozambique.
The April-June (AMJ) rainfall forecast for Southern Africa show that most parts of the region will be dry (Figure 3). The AMJ season is the dry season for most parts of the region usually with little and or no rainfall except for winter cropping areas such as parts of South Africa. The temperature forecast for the same period indicate 30-60% chances of the region experiencing warmer than average temperature in the same period (Figure 4).

2.3 West Africa

The synthesis of crop conditions as of 28 February 2020 from Crop Monitor indicate that the West Africa region is out of season (Figure 2). The planning for the 2020 cereal crops season is underway. The April-June (AMJ) rainfall forecast for the region indicate that parts of the region have about 30% chances of above normal rainfall (Figure 3). Increased chances of above normal rainfall in the upcoming season presents favourable conditions for agriculture, however, localized insecurity insurgencies are affecting agricultural activities in parts of the region. The temperature forecast for the same period indicate 30-60% chances of warmer than average temperatures (Figure 4).

[2] FEWSNET, 2020. Global Weather Summary, March 13-19 2020

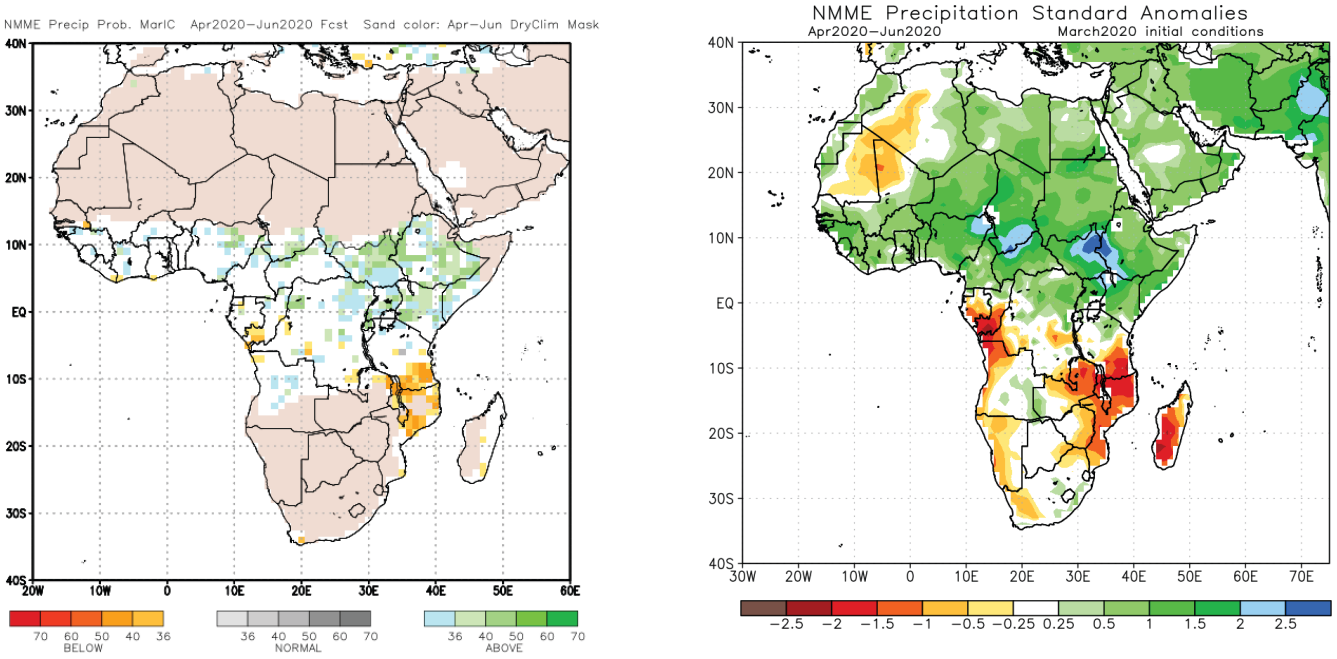


Figure 3: North American Multi Model Ensemble (NMME) rainfall forecast for April 2020 to June 2020, based on March 2020 initial conditions

The image on the left shows the probabilistic forecast and the right image shows the forecast standardized anomaly (the average across the models). The orange/red and green colours indicate the dominant tercile category (below-normal or above normal) forecast by the NMME models – colour intensity shows the corresponding probability of the forecast. White colour indicates where there is disagreement amongst models as the most-likely tercile category. Original images are available at www.cpc.ncep.noaa.gov

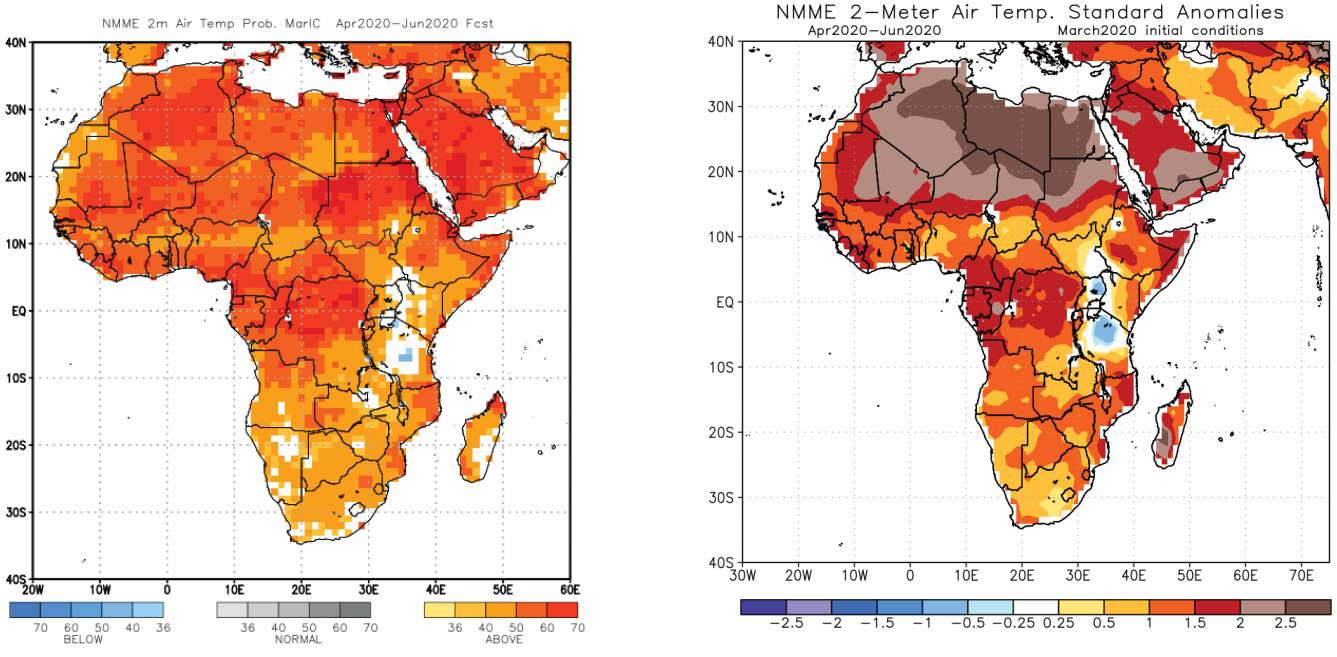


Figure 4: North American Multi Model Ensemble (NMME) temperature forecast for April 2020 to June 2020, based on March 2020 initial conditions

The image on the left shows the probabilistic forecast and the right image shows the forecast standardized anomaly (the average across the models). The orange/red and blue colours indicate the dominant tercile category (below-normal or above normal) forecast by the NMME models. The colour intensity shows the corresponding probability of the forecast. White colour indicates where there is disagreement amongst models as the most-likely tercile category. Original images are available at www.cpc.ncep.noaa.gov

3. DESERT LOCUST OUTBREAK AND IMPACTS ON FOOD SECURITY AND TRADE

The East African region is currently experiencing an upsurge of desert locust which according to FAO is the worst in 25 years in Ethiopia and Somalia and the worst in 70 years in Kenya. Figure 5 shows the situation of desert locust in East Africa as of 9 March 2020 and Figure 6 presents the March – June 2020 forecast. According to FAO desert locust situation update on 10 March 2020[3], the situation is complex and extremely alarming and the locusts have spread within the Horn of Africa and East Africa and have affected southern Kenya, northern Tanzania, northeast Uganda, southeast South Sudan and northeast D.R. Congo. The most affected countries include Ethiopia, Kenya and Somalia where there is widespread breeding and new swarms starting to form causing an unprecedented threat to food security and livelihoods for the upcoming cropping season. The ideal conditions for breeding and feeding desert locusts continue to foster their spread in the affected countries and into new areas in the region. Figure 7 shows the risks paused by the desert locust upsurge in East Africa. The Figure indicate significant threat to crops in the affected countries. Figure 8 shows the IPC acute food insecurity phase classification overlaid with desert locust infestations as of February 5, 2020. The Food Security and Nutrition Working Group (FSNWG) highlighted in their February special report on the desert locust and food security update that most affected areas are currently facing Crises (IPC Phase 3) or Stressed (IPC Phase 2) food insecurity. About 9.5 million people living in the affected areas in Ethiopia, Kenya and Somalia are currently or projected to be in Crises (IPC Phase 3) or worse (FSNWG, 2020). Although the East Africa region's MAM season rainfall forecasts indicate favourable crop growing conditions and a projected good harvest, the upsurge of desert locust threatens to reverse the good crop harvests prospects.

The FSNWG's February special report on the desert locust and food security update indicate that the most-likely scenario on food security impacts given current information and forecasted desert locust movements and historical impacts in past upsurges/plagues is that future food security impacts would be significant for affected households in areas where swarms pass through and cause damages. The greatest food security impacts are expected on households reliant on cropping activities already facing severe food insecurity (IPC Phase 2+) as a result of their existing high vulnerability and the effects of expected crop losses. The worst case scenario given

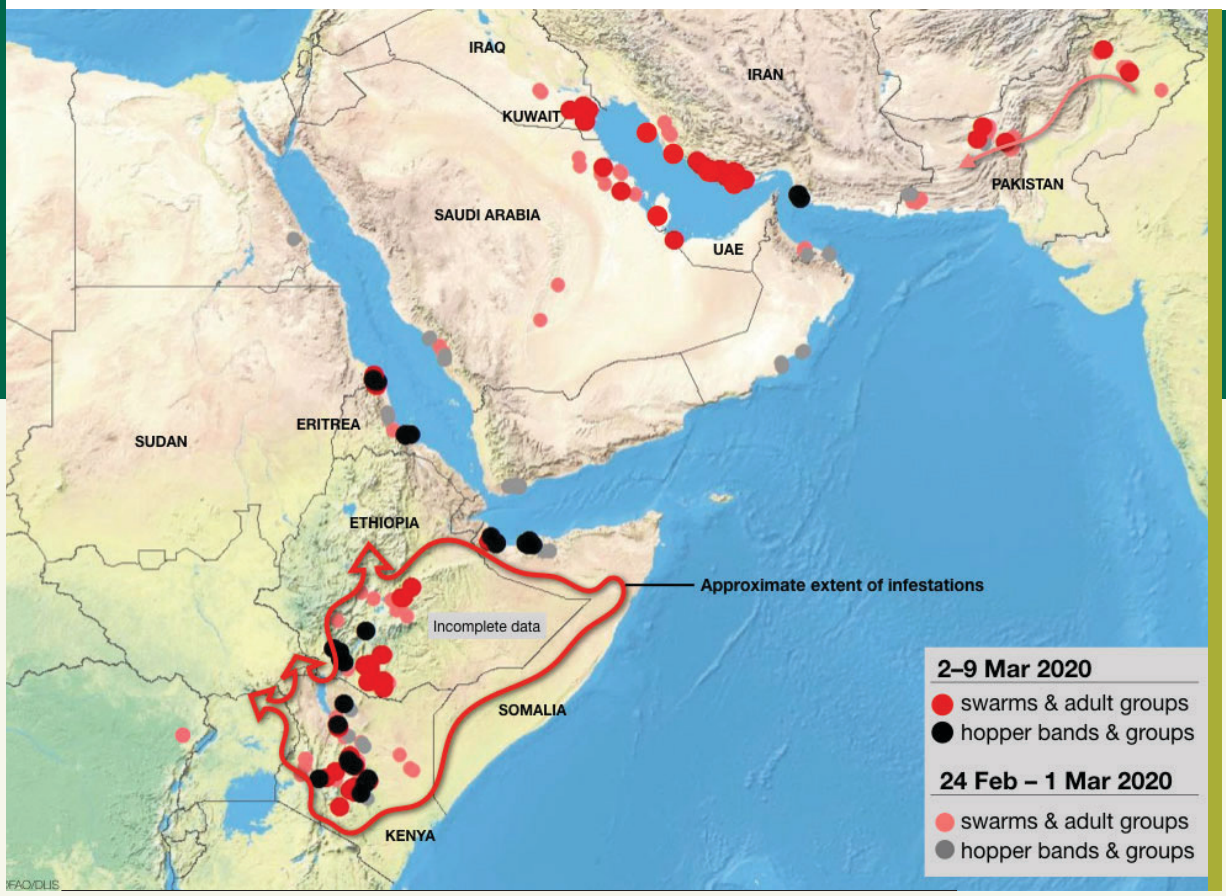


Figure 5: Situation of desert locust in East Africa as of 9 March 2020
Source: www.fao.org/ag/locusts/common/ecg/75/en/200309updateE.jpg
Accessed 11 March 2020

[3] FAO. 2020. General situation during February 2020, forecast until mid-April 2020. FAO Desert Locust Bulletin, March 2020

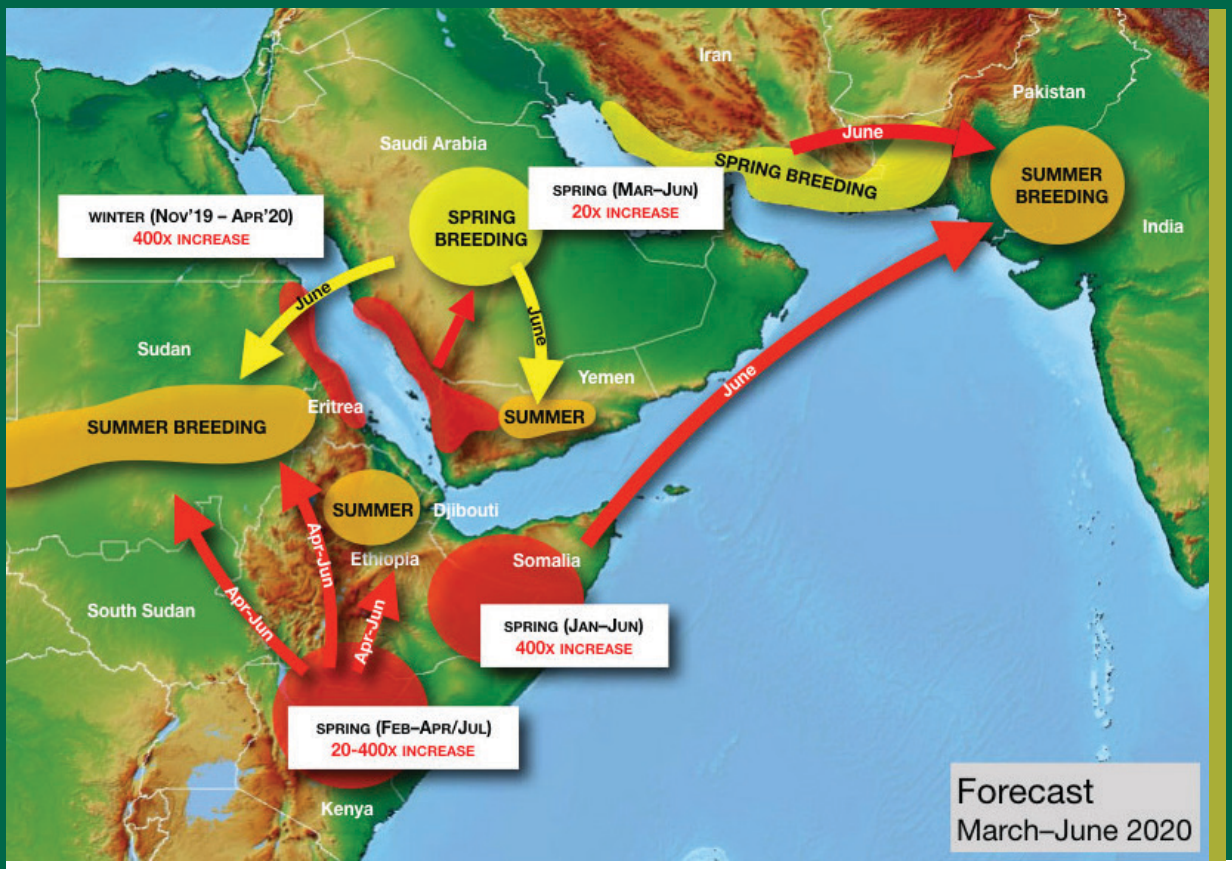


Figure 6: March – June 2020 forecast of desert locust situation in East Africa
Source: www.fao.org/ag/locusts/common/ecg/75/en/200302forecast.jpg
Accessed 11 March 2020

current information (although not considered likely) is that desert locust cause significant crop losses during the 2020 main and secondary season leading to below-average harvests; and cause major losses of pasture and browse in arid and semi-arid regions resulting in dire food security outlook.

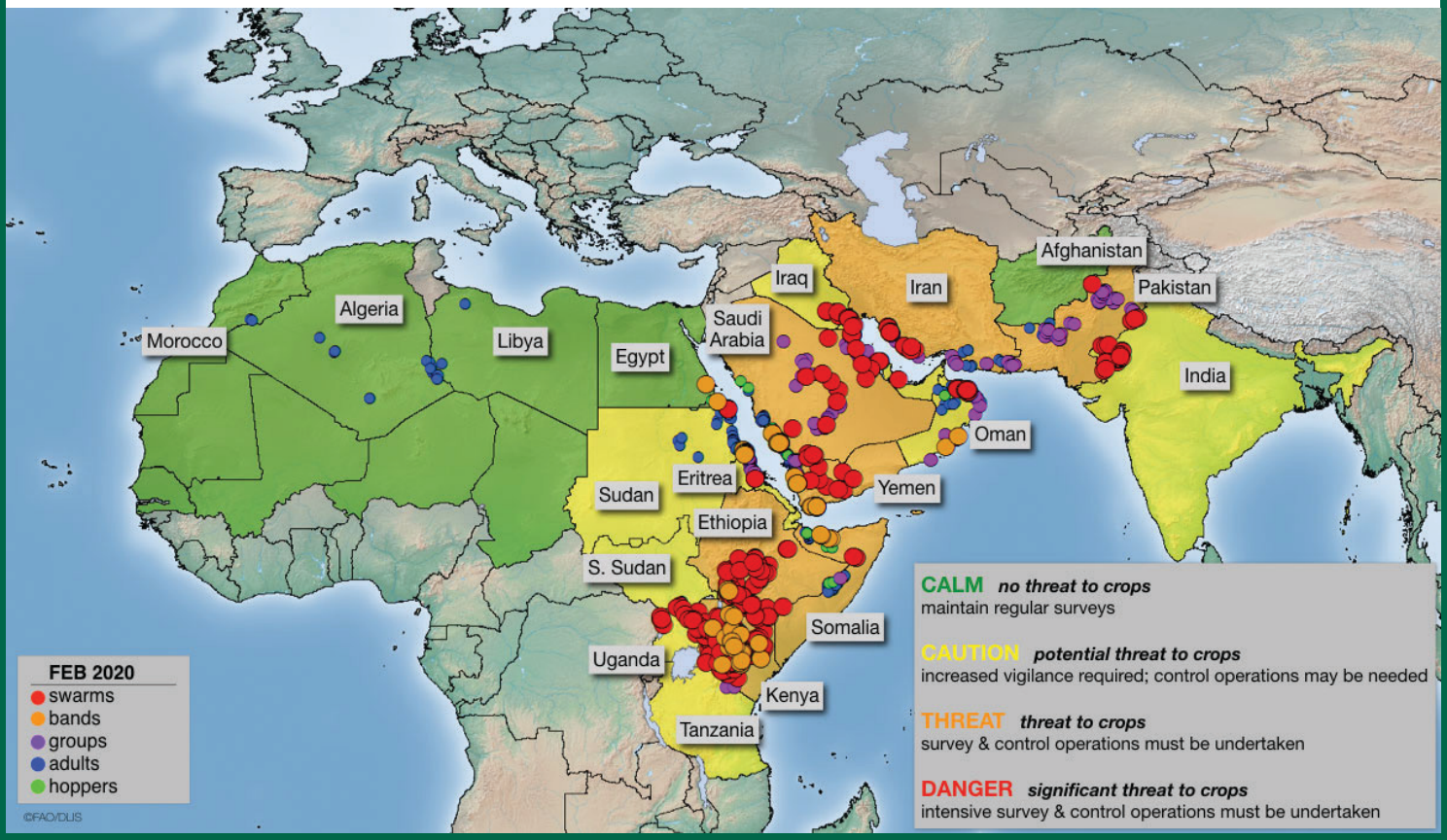


Figure 7: Desert locust risks in East Africa
Source: http://www.fao.org/ag/locusts/common/ecg/75/en/DL497riskE.jpg, Accessed 11 March 2020

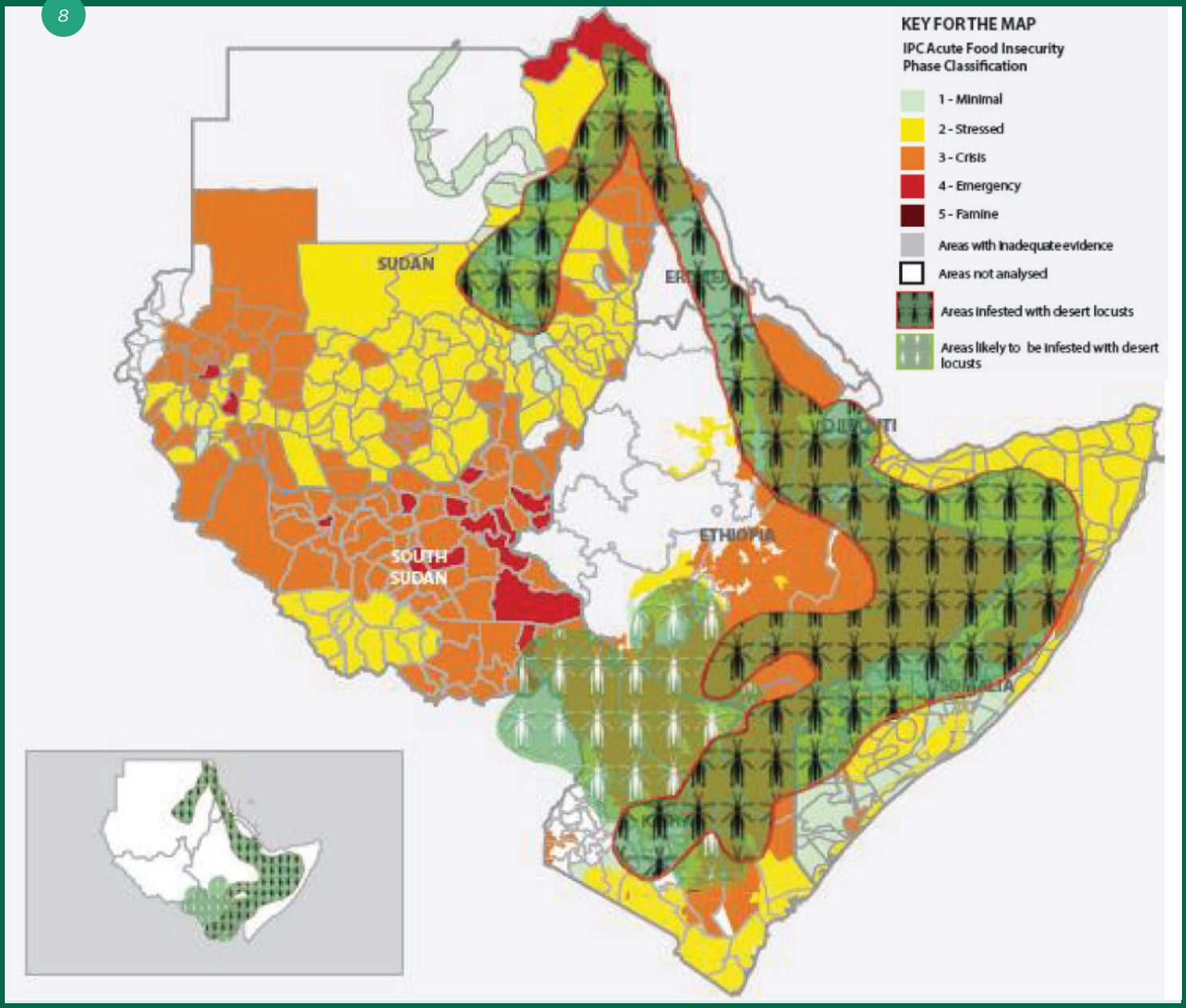


Figure 8: IPC Acute Food Insecurity Phase Classification Overlaid with Desert Locust Infestations (as of 5 February, 2020)
Source: FSNWG, 2020

[3] FAO. 2020. General situation during February 2020, forecast until mid-April 2020. FAO Desert Locust Bulletin, March 2020

4. GOVERNMENT INTERVENTIONS AFFECTING FOOD TRADE

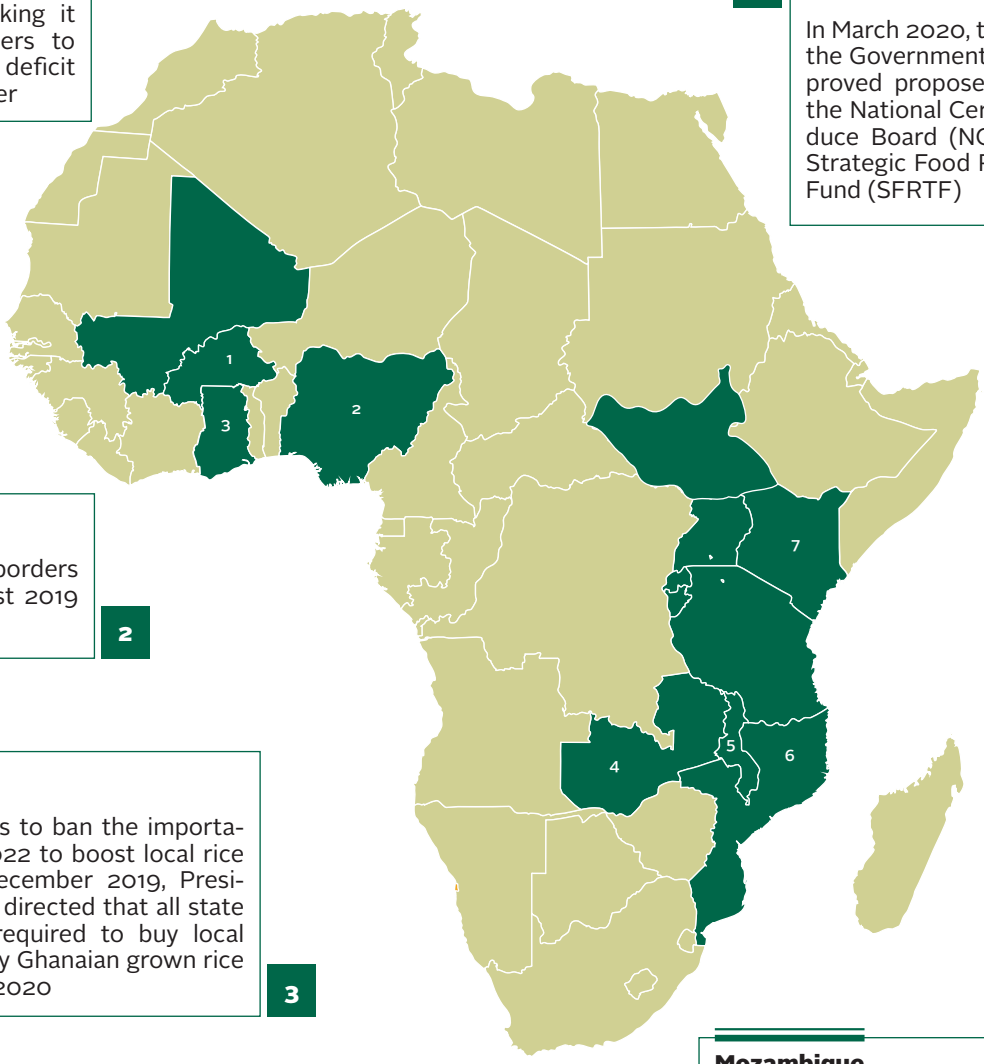
The policy developments in the different AGRA focus countries that have potential impacts on regional food trade are summarised in Figure 9 below.

Figure 9: Policy developments in the different AGRA focus countries

Burkina Faso

Export ban on cereals (especially for maize) still in place making it difficult for traders to export maize to deficit areas such as Niger

1



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Kenya

In March 2020, the Cabinet of the Government of Kenya approved proposed reforms of the National Cereals and Produce Board (NCPB) and the Strategic Food Reserve Trust Fund (SFRTF)

Nigeria

Closure of land borders effected in August 2019 still in place

2

Ghana

Government plans to ban the importation of rice by 2022 to boost local rice production. In December 2019, President Akufo Addo directed that all state institutions are required to buy local produce especially Ghanaian grown rice starting January 2020

3

Mozambique

- New Minister of Agriculture and Rural Development (MADER)
- Ministry of Agriculture merged with Rural Development to form Ministry of Agriculture and Rural Development (MADER)

6

Zambia

4

- The Zambian Ministry of Fisheries and Livestock suspended the export of stock feed with immediate effect in March 2020
- The Food Reserve Agency (FRA) released 57,987 metric tonnes of white maize under the tripartite maize programme with the Millers Association of Zambia (MAZ) and the Grain Traders Association of Zambia (GTAZ) as at 13 March 2020

5

Malawi

- 2019 presidential elections nullified by Supreme Court in February 2020, new elections to be conducted in 150 days
- The Agricultural Development and Marketing Corporation (ADMARC) had K9 billion set aside to purchase maize from farmers soon after harvest (starting April 2020)
- Cabinet of the Government of Malawi approved the 2018-2030 National Resilience Strategy

a). Kenya: In March 2020, the Cabinet of the Government of Kenya approved proposed reforms of the National Cereals and Produce Board (NCPB) and the Strategic Food Reserve Trust Fund (SFRTF). AGRA provided technical assistance to the drafting of the Cabinet Memo for the proposed reforms. The approval of the Cabinet Memo paves the way for the implementation of the reforms, which will be part of the Kenya flagship programme being developed with technical assistance from AGRA. These and the reforms being championed in the inputs sector by the Ministry of Agriculture, Livestock, Fisheries & Cooperatives (MOALF&C) in collaboration with County governments, are part of the reforms envisioned in the Agriculture Sector Transformation and Growth Strategy (ASTGS), 2019-2029. The ASTGS seeks to transform Kenya's agricultural sector based on strong private sector participation and its goals are: (i) to reduce the number of food-insecure Kenyans to zero, (ii) directly impact the livelihoods of over 15 million Kenyans (3.3 million households), and iii) accelerate agricultural production and agro-processing.

b). Malawi: Finance Minister, Joseph Mwanamvekha, announced in the mid-year budget statement in February 2020 that the Agricultural Development and Marketing Corporation (ADMARC) had K9 billion set aside to purchase maize from farmers soon after harvest. The argument from Treasury was to ensure that smallholder farmers are protected from unscrupulous traders taking advantage of increased surplus soon after harvest to pay farmers very low prices and sell later at higher prices. The Minister emphasized that the government will promote structured markets through commodity exchanges, warehousing systems and establishment of cooperatives[5].

- The Cabinet of the Government of Malawi approved the 2018-2030 National Resilience Strategy. The approval provides different actors (state and non-state) with the platform for implementation of the Strategy. The four pillars of the NRS are: Resilient Agricultural Growth; Risk Reduction, Flood Control, Early Warming and Response Systems; Human Capacity, Livelihoods and Social Protection; and Catchment Protection and Management.

- 2019 presidential election results nullified by Supreme Court in February 2020 and new elections ordered within 150 days. The developments brings uncertainty that affect economic activities and food trade.

c). Zambia: The Zambian Ministry of Fisheries and Livestock suspended the exported of stock feed with immediate effect in March 2020 following what the Minister argued was "an abrogation of an agreement by millers not to use the subsidized maize obtained from the Food Reserve Agency (FRA) for stock feed". The ban includes but is not limited to the exportation of fish, poultry, pig feed and any other maize based animal feeds and their by-products. The Ministry argued that millers were producing stock feed using subsidised maize instead of producing mealie meal for human consumption that has contributed to increasing the prices of mealie meal in the country[6].

- The Food Reserve Agency (FRA) released 57,987 metric tonnes of white maize under the tripartite maize programme with the Millers Association of Zambia (MAZ) and the Grain Traders Association of Zambia (GTAZ) as at 13 March 2020. The FRA encouraged the millers to adhere to the tripartite agreement and ensure mealie meal was available in the market at recommended prices[7].

d). Burkina Faso: Export ban on cereals (especially for maize) still exist. Although, there is no official document that has been produced by government describing the export ban, the challenge is that one would require an export permit to export cereals such as maize but getting the permit from the Ministry of Trade is almost impossible. Cereal export trade restrictions makes it difficult for traders to export maize to deficit areas such as in Niger (a net importer of maize and has always imported mainly from Burkina Faso) despite the bumper harvest in the previous and current season.

e). Ghana: Government plans to ban the importation of rice by 2022 to boost local rice production[8]. The government of Ghana has called for consumption of local rice and is championing efforts to boost the local rice industry and plan to be self-sufficient in rice by 2022. In December 2019, President Akufo Addo directed that all state institutions are required to buy local produce especially Ghanaian grown rice starting January 2020[9]. The proposed ban on rice imports and intensifying campaign for consumption of Ghanaian grown rice has potential to create access to markets for many smallholder farmers and local processors in rice producing regions such as in the north of the country. However, wide regional impacts of the ban would need to be assessed.

[5] https://times.mw/treasury-wants-admarc-to-buy-maize-early/

[6] https://www.znbc.co.zm/news/govt-bans-stock-feed-exports/

[7] https://www.znbc.co.zm/news/fra-releases-57987mt-of-maize/

f). Nigeria: Closure of land borders: As part of aggressive policies introduced by the Nigerian government to curb informal trade, boost local production and achieve food security, the government closed its land borders. The closure of the land borders with Niger, Chad, Cameroun and Benin affected trade activity and increased upward pressure on prices of imported food commodities around border markets. There are reports that the closure of the borders have led to food price increases and is a threat to free trade across the region[10].

g). Mozambique: Ministry of Agriculture merged with Rural Development to form Ministry of Agriculture and Rural Development (MADER) and new Minister appointed.

5. THE IMPACTS OF COVID-19 PANDEMIC ON FOOD SYSTEMS, FOOD SECURITY AND TRADE

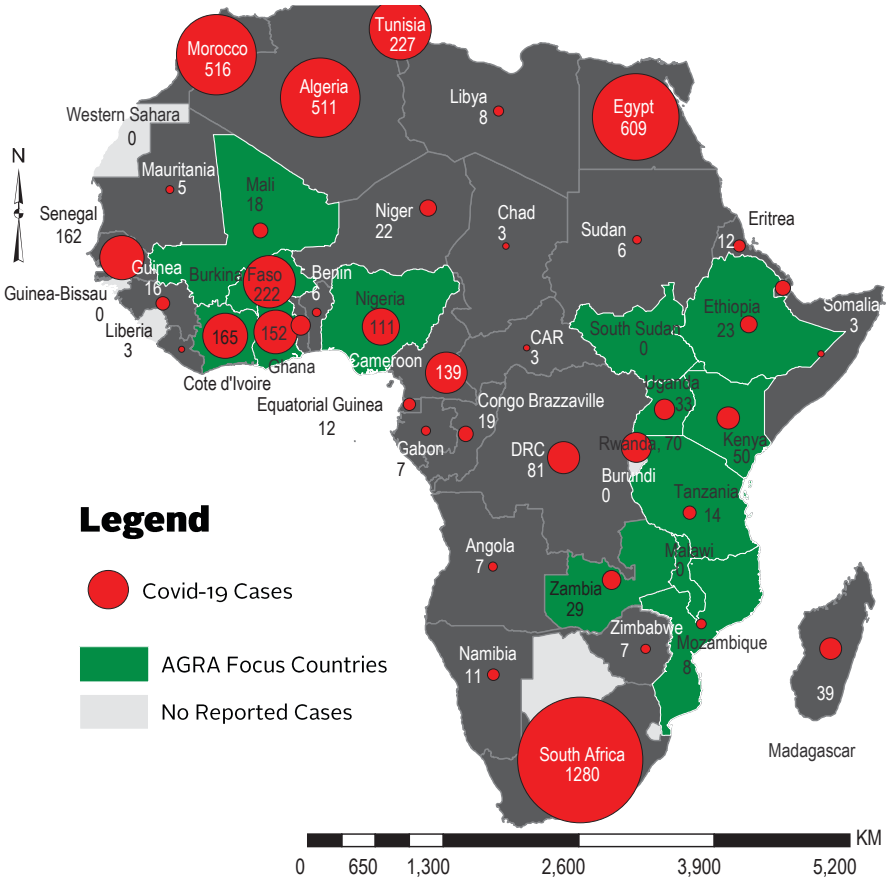
The world is experiencing an unprecedented outbreak of coronavirus (COVID-19) that was first reported in China in November 2019 and has since spread to many countries. Several countries across the world are reporting more new cases of COVID-19 while the situation in China has improved and business is getting back to normal.

Since the first COVID-19 case was reported in Africa from Nigeria on 28 February 2020, many African countries have reported increasing cases in March although at a slow rate compared to other parts of the world. As of 29 March 2020, 46 countries in Africa have reported COVID-19 cases with the continent confirming 4 228 cases (Figure 10). The World Health Organisation declared the outbreak of COVID-19 a pandemic on the 11th of March 2020.

As the COVID-19 cases started to pick across the continent in March 2020, governments have instituted strict measures to contain the spread of the disease. The measures being implemented range from travel restrictions, mandatory quarantines, border closures and restrictions of entry to non-citizens (Figure 11 – 13). International travel has been severely disrupted and airlines have cancelled flights in some cases all commercial flights (international, regional and national)[12].

The COVID-19 pandemic is affecting food systems in a number of ways: (a) directly through affecting food supply and demand, (b) indirectly through decreases in purchasing power, and capacity to produce and distribute food with the poor and vulnerable most affected (CFS, 2020[13]). The ongoing measures to curb the spread

Figure 10: COVID-19 confirmed cases in Africa 30 March 2020



Source: Authors based on data from WHO; Johns Hopkins, Worldometers.info

[8] https://www.ghanaweb.com/GhanaHomePage/business/Government-targets-2022-to-ban-importation-of-rice-802708

[9] https://www.ghanaweb.com/GhanaHomePage/NewsArchive/All-State-institutions-must-buy-Ghana-rice-from-January-2020-Akufo-Addo-orders-814672

[10] https://africanbusinessmagazine.com/region/west-africa/nigeria-border-closure-causes-economic-shock/

[11] UNECA. 2020. Economic Impact of the COVID 19 on Africa. Economic Commission for Africa, Addis Ababa, Ethiopia.

[12] Compiled from https://travel.state.gov/content/travel/en/international-travel.html and country specific statements on COVID-19 response measures

[13] CFS. 2020. Impact of COVID-19 on Food Security and Nutrition (FSN), Draft issue paper by the High-Level Panel of Experts on Food Security and nutrition (HLPE), Committee of World Food Security, Rome, Italy

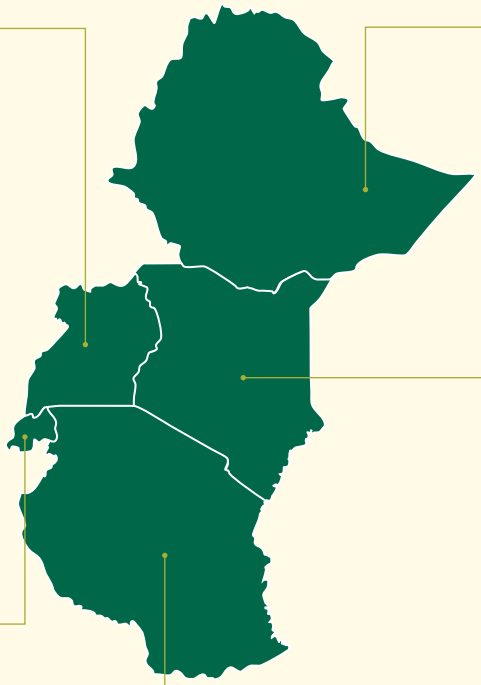
Figure 11: COVID-19 containment measures implemented by AGRA focus countries in East Africa

Uganda

- Entebbe International Airport and all land borders closed effective 23 March 2020
- → No individual will be allowed to enter or depart Uganda by air, land or water except for specific cargo vehicles which must follow strict Ministry of Health procedures
- Schools and universities are closed until 20 April 2020
- Sporting events, religious gatherings, festivals, and large gatherings have been banned until 20 April 2020
- Enhanced screening and quarantine measures to reduce the spread of COVID-19

Rwanda

- Suspended all arriving and departing flights from Rwanda effective 20 March 2020
- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- Effective 21 March 2020:
- → Unnecessary movements outside the house are not permitted
- → All Employees should work from home, except for those providing essential services
- → Borders are closed, except for cargo, goods, and returning Rwandans and Rwandan permanent residents
- → Travel between different cities and districts is not permitted
- → Shops and markets are closed, except for those selling food, medicine, hygiene and cleaning products, fuel, and other essential goods
- All bars are closed, all restaurants and cafes



Tanzania

- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- All travellers whether foreigners or returning residents arriving from COVID-19 most affected countries, will be subjected to mandatory isolation for 14 days at their own cost at designated facilities identified by the Government
- All travellers required to complete a Health Surveillance Form in the plane, or any other transport means and submit them to Port Health authorities upon arrival
- After 14 days quarantine, those with no symptoms of COVID-19 are released and will be required to register personal information for future tracking purposes

Ethiopia

- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- Travel restrictions expected with little or no advance notice
- All land borders closed to slow the spread of COVID-19 effective 23 March 2020
- Closing of land borders to protect spread of COVID -19, means that people will not be able to cross and leave the country to and from neighbouring countries by road
- All passengers arriving in Ethiopia will be subject to a 14-day quarantine period at a designated hotel at their own expense
- Tigray Regional State enacted comprehensive travel ban and other measures effective 28 March 2020

Kenya

- Effective 17 March 2020, travel suspended for all persons coming into Kenya from any country with reported COVID-19 cases
- All international flights in and out of Kenya suspended effective 25 March 2020. Cargo planes will not be affected
- All passengers coming into the country will undergo mandatory quarantine at a government designated facility at their own expense
- Restaurants will remain open for take away service only, all bars are closed until further notice
- Services at churches, mosques, and other large gatherings are suspended
- Weddings and funerals are restricted to immediate family members

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of the COVID-19 pandemic across the continent are happening when the new cropping season is starting in East and West Africa while in Southern Africa the harvesting season is starting. In the later, the COVID-19 containment measures would affect harvesting operations and some crops could end up rotting in the farms. In the former, government interventions to address the immediate health impacts of COVID-19 are leaving farmers with difficulties making appropriate planning and preparation for the new cropping season.

Although governments are indicating that the food sector is not affected, many actors along agricultural value chains are being adversely affected with the current measures. For example, the immediate impacts of disruptions in input distribution channels has been limited availability of farm inputs (seeds, fertilizers, and

{Continued on Pg13}

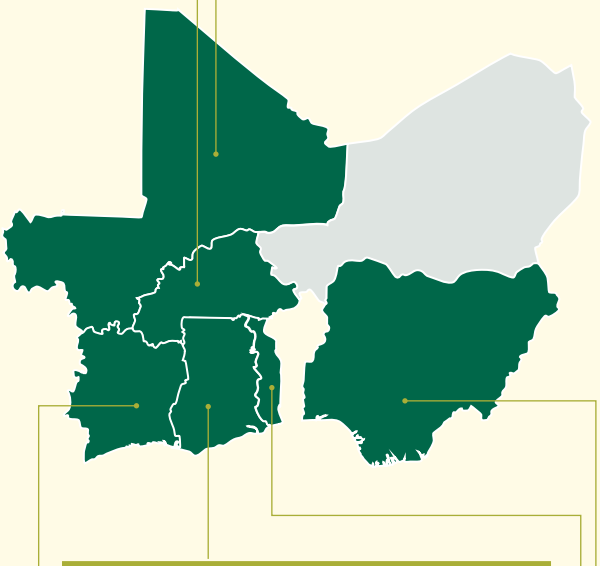
Figure 12: COVID-19 containment measures implemented by AGRA focus countries in West Africa

Burkina Faso

- Ouagadougou and Bobo-Dioulasso airports closed to commercial aviation, all land borders closed, except freight traffic for two weeks effective 21 March 2020
- Gatherings larger than 50 people are banned effective 21 March 2020
- Curfew between 19h00 and 05h00
- Two-week quarantine in all cities where there have been confirmed cases of COVID-19: Ouagadougou, Bobo-Dioulasso, Boromo, Banfora, Houndé, Dedougou, Manga and Zorgho
- Transportation to or from cities with confirmed cases of COVID-19 and public services including schools and government offices are closed

Cote d'Ivoire

- Land, aviation and maritime borders closed for an indeterminate period of time effective 22 March 2020. Cargo shipments not affected
- Travel restrictions expected with little or no advance notice
- All arrivals of passenger planes suspended
- Schools (including pre-schools and universities) closed for 30 days effective 16 March 2020
- Sporting events, festivals and gatherings larger than 50 people are banned effective 18 March 2020
- Social distancing is in effect: no handshakes, maintain at least one-meter distance from other persons
- All confirmed and suspected cases of COVID-19 to be quarantined in state-run centres



Ghana

- Restrictions on movement in the Greater Accra and Kumasi Metropolitan Areas for two weeks effective 30 March 2020: all residents of the affected areas to stay home during that time and only go out for essential needs including food and medicine
- No non-essential inter-city movement of commercial or personal vehicles
- Government suspended, all schools, all public gatherings including conferences, workshops, funerals, festivals, political rallies, sporting events and religious activities, such as services in churches and mosques for four weeks effective 16 March 2020
- Any traveller, except for Ghanaian citizens and persons with Ghana residence permits, who, within the last 14 days, has been to a country that has recorded at least 200 cases of COVID-19, will not be admitted to Ghana. Airlines are instructed not to allow such persons to embark and border posts are instructed not to allow such persons into the jurisdiction effective 17 March 2020
- Mandatory 14-day self-quarantine for persons who are allowed to enter the Ghanaian jurisdiction from a country that has recorded at least 200 cases of COVID-19 effective 17 March 2020
- Any admissible traveller who exhibits symptoms of COVID-19 will be quarantined and tested upon reaching Ghana effective 17 March 2020

Mali

- Suspended all incoming and outgoing commercial flights to Bamako's Modibo Keita International Airport (BKO) from affected countries effective 19 March 2020
- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- Travel restrictions expected with little or no advance notice
- Schools and universities are closed until 9 April 2020
- Sporting events, festivals, gatherings larger than 50 people are banned
- Bars and night clubs have been closed
- Government has imposed a daily curfew from 21h00 until 05h00
- Restrictions to passenger vehicle occupancy effective March 27 in order to promote social distancing

Nigeria

- Restricted entry into Nigeria for travellers from countries with over 1000 cases domestically for a period of four weeks effective 21 March 2020
- Suspended the issuance of visa on arrival to travellers from countries with 1 000 cases with immediate effect effective 19 March 2020
- Enhanced screening at ports of entry

Togo

- No passengers will be able to enter Togo through the international airport for 14 days effective 26 March 2020
- The restrictions applies to everyone, regardless of nationality, even to those with existing visitor visas or national IDs due to a shortage of quarantine rooms
- All land border crossings with Togo, Ghana, and Burkina Faso are closed
- Travel restrictions on entry into the cities of Lome, Tsevie, Kpalime, and Sokode effective 20 March 2020

Figure 13: COVID-19 containment measures implemented by AGRA focus countries in Southern Africa

Zambia

- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- Travel restrictions expected with little or no advance notice
- All public schools are closed effective 20 March 2020
- Airports in Ndola, Livingstone, and Mfuwe suspended international flights until further notice effective 26 March 2020 to mitigate the spread of COVID-19
- Kenneth Kaunda International Airport in Lusaka remain open until further notice
- Restaurants operate only on a take-away and delivery basis effective 25 March 2020
- All bars, night clubs, cinemas, gyms and casinos closed effective 25 March 2020
- Public gatherings such as conferences, weddings, funerals, festivals are restricted to at least 50 people subject to complying with public health authority guidelines

Malawi

- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- Travel restrictions expected with little or no advance notice
- Schools and universities are closed until further notice
- Hosting of international meetings have been suspended
- All gatherings including weddings, funerals, church services, rallies and government meetings larger than 100 people have been banned
- All cross-border passenger travel is suspended effective 1 April 2020

Mozambique

- Ressano-Garcia / Komatipoort is the only open land border remaining with South Africa
- Commercial airlines are rapidly eliminating international flights departing Mozambique, and connecting flights are being disrupted by various government mandated restrictions
- Fourteen day self-quarantine is mandatory for all arrivals, regardless of prior travel effective 23 March 2020
- Enhanced screening and quarantine measures to reduce the spread of COVID-19
- All schools and universities are closed, and gatherings of more than 50 people are prohibited

{Continued from Pg12}

herbicides) and increases in prices such as in Kenya . Restricted human movement also affect seasonal workers creating deficit of workers that means many planting and preparation activities are affected in many parts of the continent where farmers are supposed to be planting.

Food supply chains have been disrupted to varying levels by COVID-19 containment measures in different countries and regions across the continent. This is affecting food supply to different parts of the countries and regions. COVID-19 lockdowns have caused panic buying behaviour in some countries. Despite availability of enough food in supply chains, the panic behaviour and lockdowns have resulted in disruptions to food supplies. If the containment measures are prolonged food supply disruptions might affect availability of food in the medium to long terms. The ongoing measures if prolonged would results in disruptions in production, processing and marketing of food supplies. In the short-term the COVID-19 containment measures created food demand spikes due to panic buying behaviour by consumers. However, a declining trend in food demand is expected due to loss of income and purchasing power and physical ability to purchase food as many people lose their jobs and businesses struggle to recover from the economic slowdown. These short-term changes will affect long-term food demand as well food and nutrition security CFS, 2020).

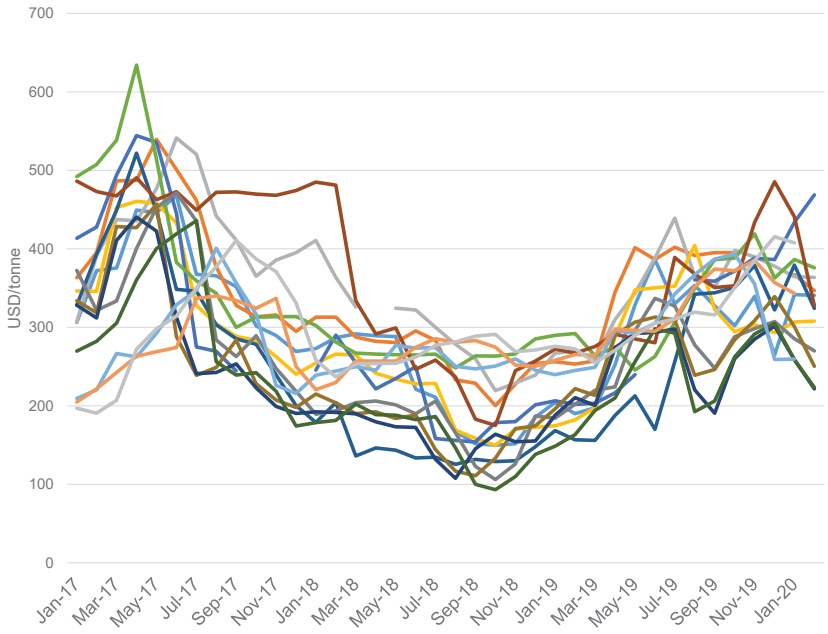
Building resilient food systems is critical to help countries withstand the threats of COVID-19 and other future shocks. Innovative ways of getting health and food supplies to the affected and vulnerable remains critical across the continent. Social safety nets are important to support the health and nutrition needs of the vulnerable populations. Government regulation and transparency in ensuring efficient emergency response systems is required to ensure the affected populations receive adequate health and food requirements. The private sector also has an important role to play in supporting governments ensure that health and food needs by the affected population are readily available, for example, through use of innovative e-commerce interventions to move health and food products from surplus regions to areas of need.

6. AGRICULTURAL COMMODITIES AND FOOD PRICE MONITORING

6.1 East Africa

The prices of coarse grains declined in most countries in the East Africa region in February due to increased market supplies from the recently completed second season harvests. All the markets indicate a decline in maize prices in February except increases in Arusha in Tanzania (8.05%), Nakuru (0.29%) and Addis Ababa (0.27%). The declines were relatively high in Kigali (25.71%), Kampala (16.82%), Iringa (14.58%), Lira (14.37%) and Masindi (13.64%). Despite the declines the prices remain well above a year earlier across all focus countries. Some of the factors that have contributed to relatively higher prices include reduced first/main season harvests in several cropping areas and heavy rains in late 2019 that disrupted agricultural and marketing activities (FAO, 2020)[14].

Wholesale prices of maize in selected East African markets



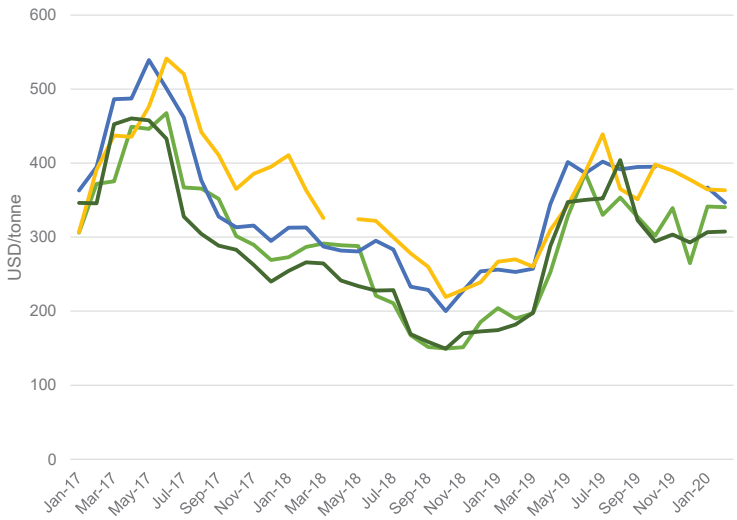
	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
KEN- Eldoret	340.58	-0.27	28.59	4.03	72.66
KEN- Mombasa	346.65	-5.54		-12.23	34.75
KEN- Nairobi	363.48	-0.29	-3.77	3.51	39.61
KEN- Nakuru	307.69	0.29	5.02	-4.70	55.63
TZ- Arusha	468.68	8.05	21.36	30.69	130.65
TZ- Dar es Salaam	375.76	-2.76	3.57	-2.66	42.65
TZ- Iringa	323.97	-14.58	0.61	-5.80	107.75
RWA- Kigali	327.5	-25.71	-32.52	-6.56	18.91
UG- Kabale	269.83	-5.42	-12.16	8.87	22.86
UG- Kampala	250.37	-16.82	-26.18	1.71	17.47
UG- Lira	221.51	-14.37	-26.54	16.24	10.48
UG- Masindi	223.4	-13.64	-26.74	8.44	15.08
ETH- Addis Ababa	259.5	0.27	-26.92	-29.31	5.96
ETH- Bahirdar	343.2	-3.81	-10.88	-2.44	29.36
ETH- Diredawa	407.6	-1.88	5.84	27.69	49.63

Source: Authors' construction based on data from FAO (2020)

In Kenya maize prices declined in February except in Nakuru (0.29% increase) but remained well above those a year earlier by 35% - 73%. Substantial crop production shortfalls in the main "long rains" harvest contributed to the high maize prices.

[14] FAO. 2020. Monthly report on food price trends. FPMA Bulletin, 11 March 2020

Wholesale prices of maize in Kenya

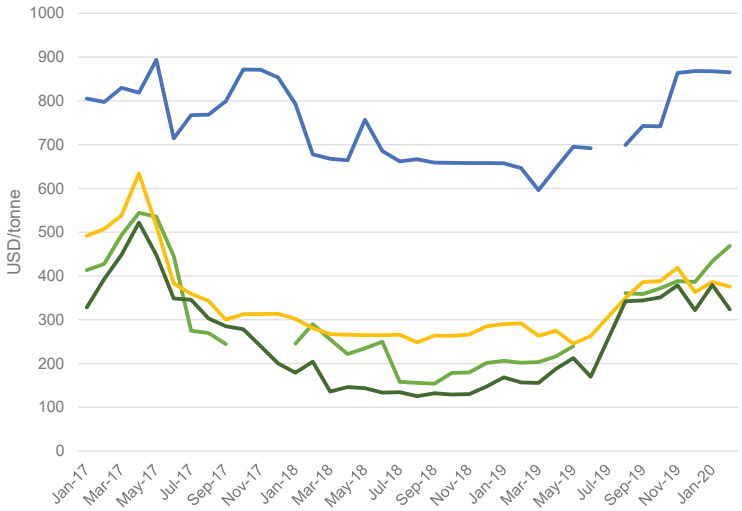


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Eldoret	340.58	-0.27	28.59	4.03	72.66
Mombasa	346.65	-5.54		-12.23	34.75
Nairobi	363.48	-0.29	-3.77	3.51	39.61
Nakuru	307.69	0.29	5.02	-4.70	55.63

Source: Authors' construction based on data from FAO (2020)

Tanzania experienced increases in maize prices in Arusha (8.05%) and declines in Iringa (14.58%), Dar es Salaam (2.76%) while bean prices slightly declined by 0.26% in Dar es Salaam. Overall, the prices remained well above those a year earlier increasing by 108% and 131% in Iringa and Arusha respectively and by 43% in Dar es Salaam. The increased demand from Kenya, Rwanda and Southern Africa contributed to pushing prices well above those in the year earlier.

Wholesale prices of maize and beans in Tanzania

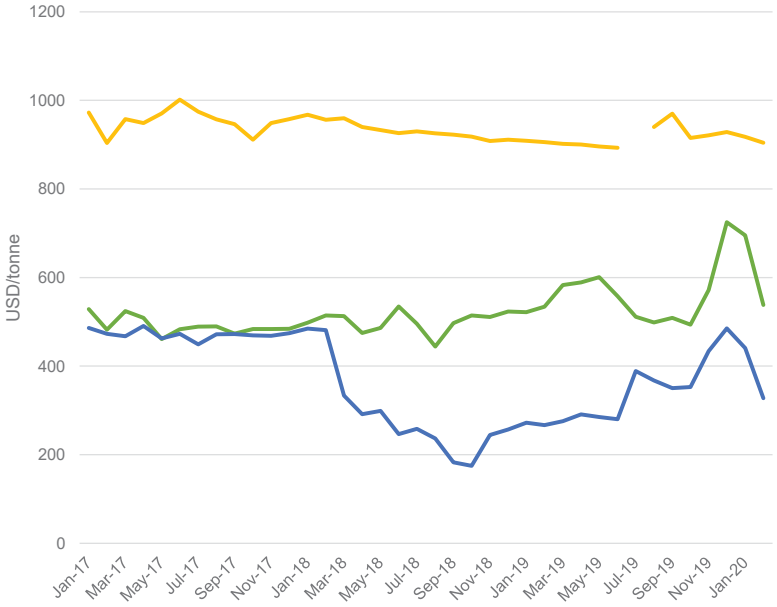


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Arusha, Maize	468.68	8.05	21.36	30.69	130.65
Dar es Salaam, Beans	865.44	-0.26	-0.29	16.55	45.18
Dar es Salaam, Maize	375.76	-2.76	3.57	-2.66	42.65
Iringa, Maize	323.97	-14.58	0.61	-5.80	107.75

Source: Authors' construction based on data from FAO (2020)

In Rwanda, prices of maize, bean and rice all declined in February by 23%, 26% and 1.44% respectively. Except for bean which declined by 7.74% from the year earlier, the price of maize was 18.91% more than that of the year earlier while that of rice increased by only 0.32% from a year earlier. Reduced imports from Uganda due to closure of border customs posts between the two countries contributed to higher prices in Rwanda (FAO, 2020).

Wholesale prices of maize, beans and rice in Rwanda

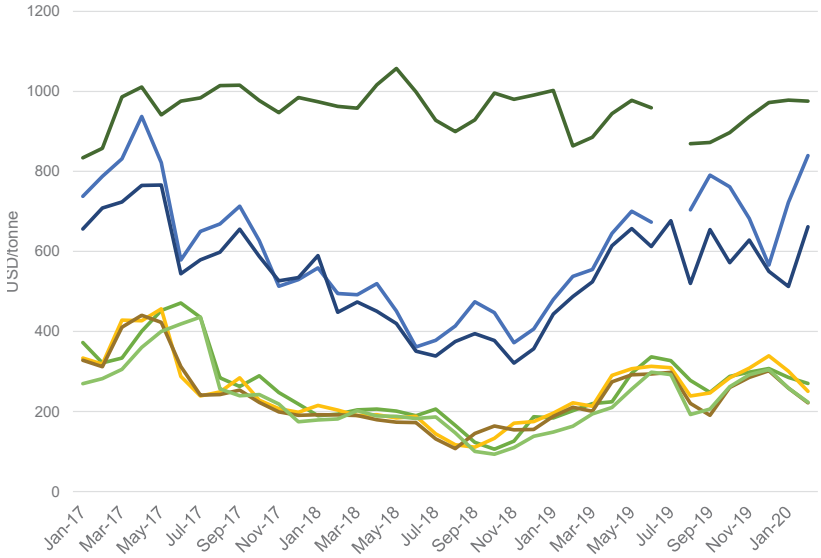


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Kigali, Beans	537.95	-22.65	-25.81	5.70	-7.74
Kigali, Maize	327.5	-25.71	-32.52	-6.56	18.91
Kigali, Rice	904.53	-1.44	-2.59	-6.75	0.32

Source: Authors' construction based on data from FAO (2020)

In Uganda maize prices declined in February by between 5% and 17% due to increased market availabilities from second season harvests. Compared to the year earlier, prices remained relatively high by 10% to 23% and some of the contributing factors include strong demand from Kenya and South Sudan.

Wholesale prices of maize, beans and rice in Uganda

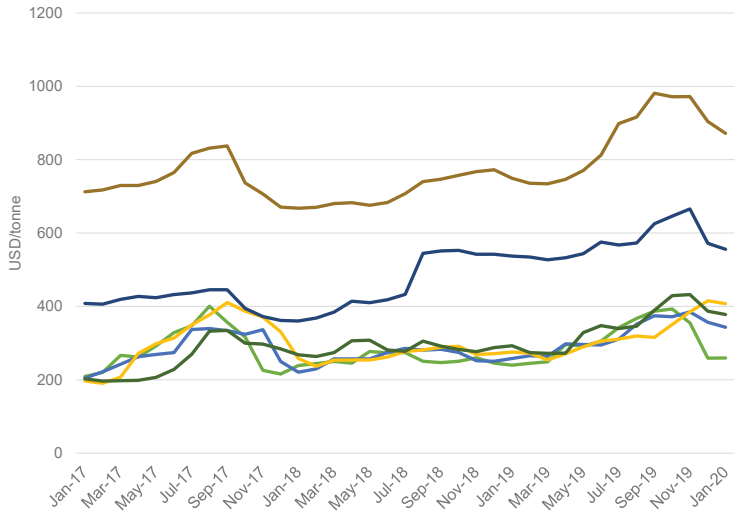


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Kabale, Maize	269.83	-5.42	-12.16	8.87	22.86
Kampala, Beans	839.46	16.16	48.40	6.18	51.31
Kampala, Maize	250.37	-16.82	-26.18	1.71	17.47
Kampala, Rice	975.36	-0.29	0.36	11.84	10.14
Lira, Beans	661.74	29.14	20.29	1.09	26.28
Lira, Maize	221.51	-14.37	-26.54	16.24	10.48
Masindi, Maize	223.4	-13.64	-26.74	8.44	15.08

Source: Authors' construction based on data from FAO (2020)

In Ethiopia maize, sorghum and teff prices declined in February except in Addis Ababa which had a slight increase of 0.27% from January. Wheat prices also declined in February except in Diredawa which showed a slight increase of 0.30%. The declines in prices were contributed to increased supplies from the recently completed "Meher" harvest. Compared to a year earlier the prices remained high due to depreciation of the national currency that resulted in increased transport and production costs (FAO, 2020).

Wholesale prices of maize, sorghum and teff in Ethiopia



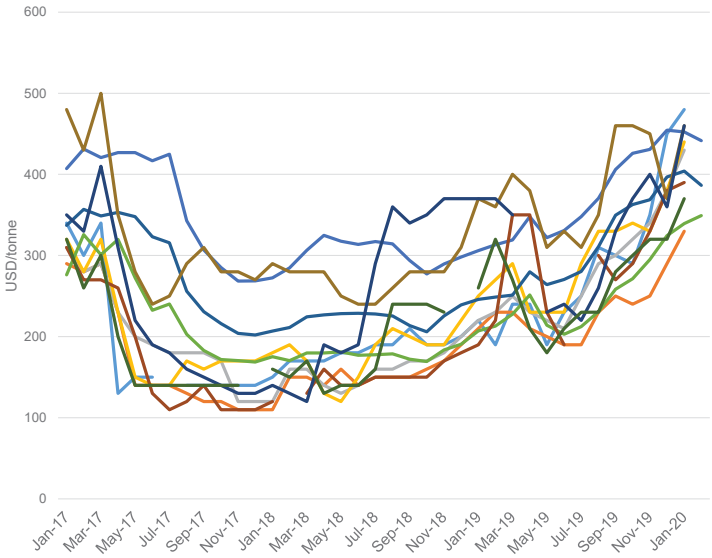
	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Addis Ababa, Maize	259.5	0.27	-26.92	-29.31	5.96
Bahirdar, Maize	343.2	-3.81	-10.88	-2.44	29.36
Diredawa, Maize	407.6	-1.88	5.84	27.69	49.63
Addis Ababa, Sorghum (red)	378.1	-2.30	-12.52	9.28	37.89
Addis Ababa, Sorghum (white)	555.7	-2.82	-16.49	-3.04	3.95
Addis Ababa, Teff (mixed)	871.9	-3.53	-10.28	-4.84	18.48

Source: Authors' construction based on data from FAO (2020)

6.2 Southern Africa

Prices of maize in selected markets in Malawi, Mozambique and Zambia increased by between 3% and 28% in February except in Zambia which recorded slight decrease of mealie meal of about 2%. The largest increases were in Mozambique and Malawi. The 2020 harvests from areas that have experienced good cropping season such as in Malawi and north eastern parts of Zambia are expected to contribute to decline in maize prices. Compared to a year earlier the prices remain steeply high across the focus countries.

Retail prices of maize in selected Southern African markets

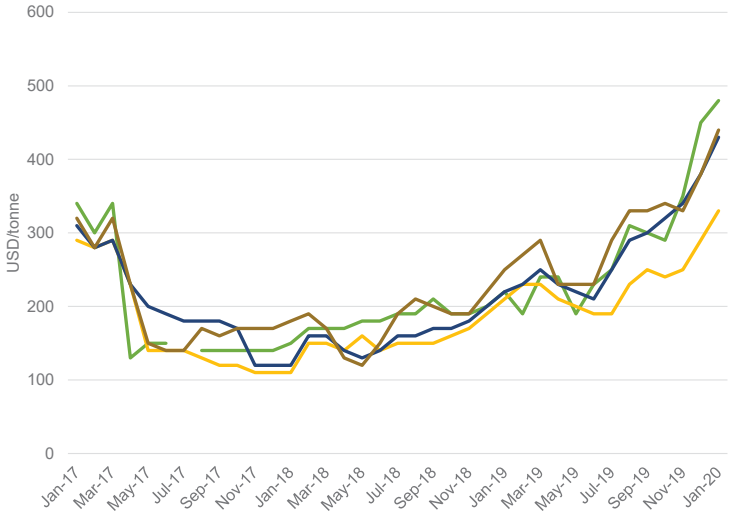


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
MW-Lilongwe	480	6.67	37.14	54.84	152.63
MW-Mzuzu	330	13.79	32.00	43.48	43.48
MW- National Average	430	13.16	26.47	48.28	86.96
MW-Nsanje	440	15.79	33.33	33.33	62.96
ZM -National Average, Breakfast maize meal	441.6	-2.39	-2.82	8.77	38.35
ZM-National Average	349.28	2.96	7.64	35.16	53.37
ZM-National Average, White roller maize meal	386.4	-4.36	-2.62	10.53	53.82
MZ-Angonia	390	2.63	18.18	30.00	77.27
MZ-Maputo	460	24.32	2.22	31.43	27.78
MZ-Montepuez	460	27.78	15.00	76.92	24.32
MZ-Ribaue	370	15.63	15.63	60.87	15.63

Source: Authors' construction based on data from FAO (2020)

In Malawi maize prices slightly increased in February but lower than those of 3 months and a year earlier. The national average price increased by 87% from earlier year and by 150% in Lilongwe. Improved rainfall in mid-January and early February is expected to result in good harvests in the country that will contribute to reduce prices.

Retail prices of maize in Malawi

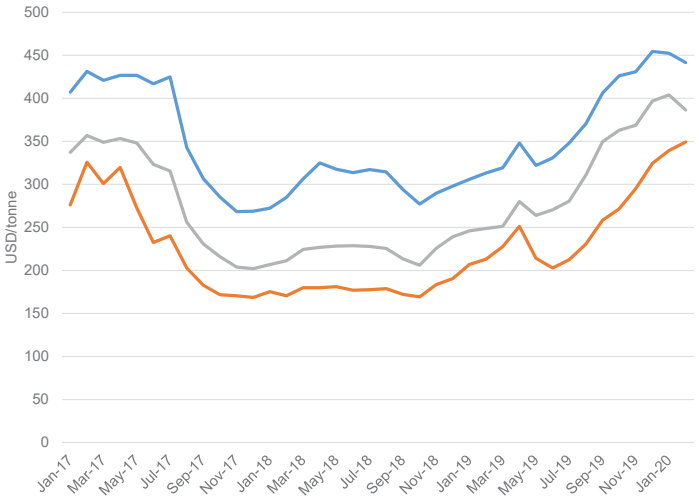


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Lilongwe, Maize	480	6.67	37.14	54.84	152.63
Mzuzu, Maize	330	13.79	32.00	43.48	43.48
National Average, Maize	430	13.16	26.47	48.28	86.96
Nsanje, Maize	440	15.79	33.33	33.33	62.96

Source: Authors' construction based on data from FAO (2020)

In Zambia, national average prices of mealie meal decreased in February and that of maize grain slightly increased by 2.96%. Year on year, national average prices increased by between 38% and 54%.

Retail prices of maize in Zambia

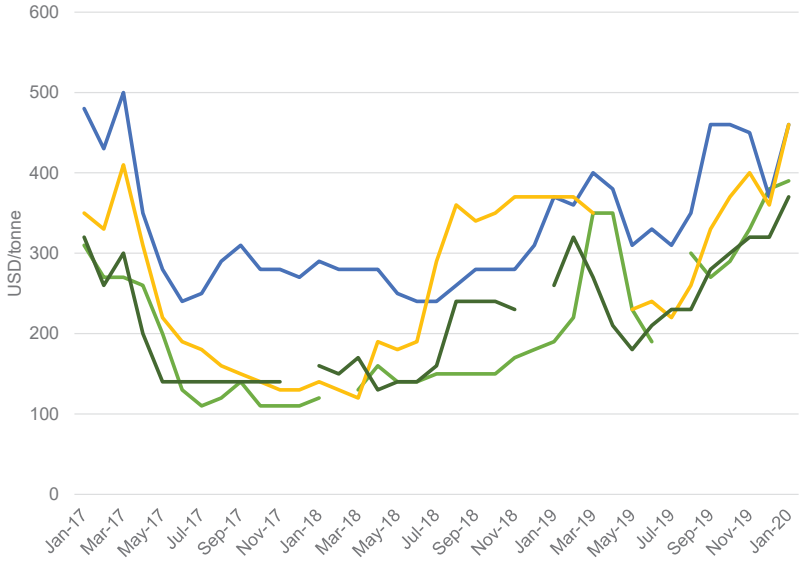


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Ye
National Average, Breakfast maize meal	441.6	-2.39	-2.82	8.77	38.3
Retail, National Average, Maize (white)	349.28	2.96	7.64	35.16	53.3
National Average, White roller maize meal	386.4	-4.36	-2.62	10.53	53.8

Source: Authors' construction based on data from FAO (2020)

In Mozambique, maize prices increased in February with relatively high increases in Montepuez (27.78%), Maputo (24.32%) and Ribaue (15.63%). The prices also remain well above those of a year earlier. The country is likely to receive reduced 2020 harvests due to poor cropping season experienced in most parts of the country. This will continue to push prices up across the country.

Retail prices of maize (white) in Mozambique



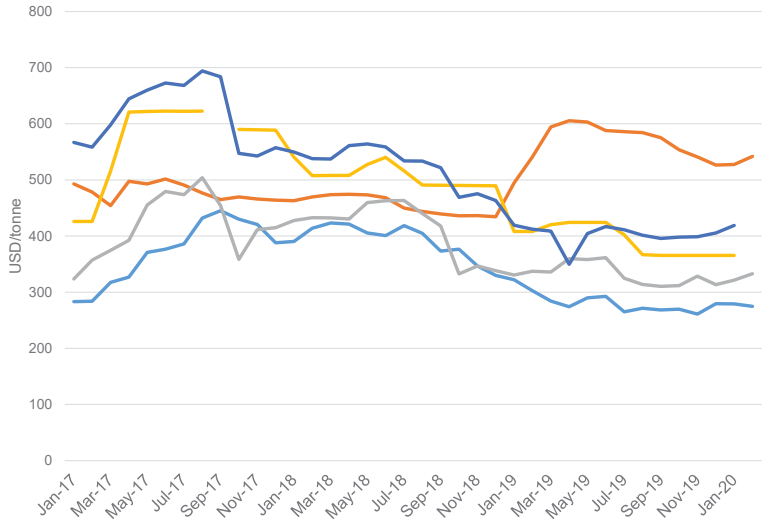
	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Angonia	390	2.63	18.18	30.00	77.27
Maputo	460	24.32	2.22	31.43	27.78
Montepuez	460	27.78	15.00	76.92	24.32
Ribaue	370	15.63	15.63	60.87	15.63

Source: Authors' construction based on data from FAO (2020)

6.3 West Africa

Prices of coarse grains have been relatively stable in Sahelian countries due to good supplies from the 2019 harvests except in conflict affected areas which face market disruptions and limited availabilities. The closure of the land borders by Nigeria in August 2019 continued to significantly affect regional marketing activities contributing to upward increase in prices in neighbouring markets (FAO, 2020). Millet prices increased in the selected countries in February except in Burkina Faso where prices decreased by 1.65% and Nigeria, Ibadan where they remained the same as in January. Compared to a year earlier, millet prices decreased across all selected markets except in Nigeria, Lagos where they increased by 1.60%. Sorghum prices decreased in February in Togo (11.63%), Burkina Faso (1.67%) and Nigeria (0.89%) while there were substantial increases in Niger (22.90%) and Mali (6.55%) during the same period. Compared to a year earlier, millet prices declined in Burkina Faso (14.14%, Mali (13.37%), Togo (11.63%) and Nigeria (3.16%) while they increased in Ghana (23.93%) and Niger (10.38%) during the same period. Specific country graphs on specific crops indicate the general trend of stable and decreasing prices of coarse grains in recent months due to improved supplies from the 2019 harvests. Conflict affected areas continue to experience market disruptions, low agricultural activities and displacements that are affecting movement of agricultural food commodities contributing to pushing prices up.

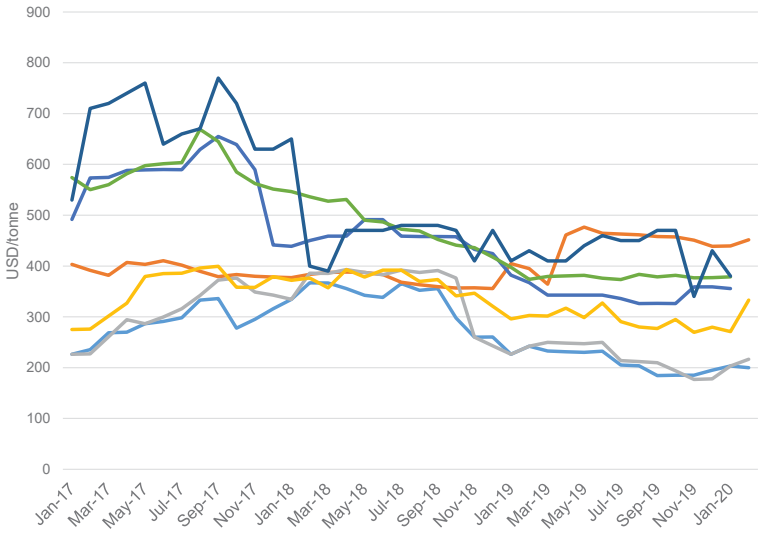
Wholesale prices of millet (local) in selected West African markets



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
BF-Ouagadougou	274.6	-1.65	-1.75	2.31	-3.41
GH-Accra	541.75	2.73	2.93	-5.81	-8.86
NIGER-Niamey	332.8	3.51	6.19	7.25	-0.95
NIGERIA-Ibadan	365.5	0.00	0.00	-0.35	-10.44
NIGERIA-Lagos	418.8	3.33	4.99	4.33	1.60

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of sorghum (local) in selected West African markets



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
BF-Ouagadougou	199.7	-1.67	2.52	8.24	-14.14
GH-Accra	451.62	2.72	2.91	-1.38	23.93
MALI-Bamako	216.4	6.55	21.64	3.20	-13.37
NIGER-Niamey	332.8	22.90	19.07	20.23	10.38
NIGERIA-Ibadan	355.7	-0.89	-0.92	9.01	-3.16
NIGERIA-Lagos	378.5	0.34	0.42	-1.28	1.23
TOG-Lomé*	380	-11.63	11.76	-15.56	-11.63

Source: Authors' construction based on data from FAO (2020)

7. FOOD SECURITY OUTLOOK

Cereal production in Low-Income Food-Deficit Countries (LIFDCs)[15] in Africa is estimated to decline by 4.5% in 2019 compared to 2018 levels (Table 1). Adverse weather conditions and pest outbreaks (especially the desert locust in East Africa) contributed to the estimated decline (FAO, 2020)[16]. Both East Africa (8.2%) and Southern Africa (5.4%) are estimated to experience declines in cereal production in LIFDCs. West Africa is estimated to have a marginal increase of 0.1% while Central Africa cereal production will increase by 2.3% from the 2018 production levels.

In East Africa, the desert locust upsurge that has affected the region threatens agricultural activities and prospects of the coming "long rains" season starting in March/April. The region is projected to have above-normal rainfall in the March-May (MAM) season. Although this provides good cropping conditions for production, they also create conducive breeding conditions for desert locusts that could spur further outbreaks affecting production. In Southern Africa, improved rains in mid-January and early February in parts of the region increased the 2020 harvest prospects in a number of countries despite early seasonal rainfall deficits. The 2020 cereal production is expected to increase compared to the reduced output of 2019 although some areas are expected to experience below average such as in Zimbabwe due to poor rainfall and economic difficulties. In West Africa, planting for the 2020 cereal crops starts in March. The April-June (AMJ) rainfall forecast for the region indicate that parts of the region have about 30% chances of above normal rainfall.

Table 1: Cereal production of Low-Income Food-Deficit Countries (LIFDCs) in Africa (million tonnes)

	5-yr Avg[17].	2018	2019 estim.	Change: 2019/2018 (%)
Africa (37 countries)	101.1	110.8	105.8	-4.5
East Africa	52.0	56.6	52.0	-8.2
Southern Africa	10.0	10.8	10.2	-5.4
West Africa	34.3	38.7	38.7	0.1
Central Africa	4.8	4.8	4.9	2.3

Source: FAO (2020)

The cereal import requirements for African LIFDCs is estimated at 30.2 million tonnes in the 2019/20 marketing year, 2.8 million tonnes above volumes of the previous year (Table 2). The import requirements by region shows that both East and West Africa would require about 12 million tonnes of cereal imports while Southern Africa and Central Africa would require 3.5 million tonnes and 2.7 million tonnes respectively. Adverse weather conditions and pest outbreaks contribute to increased import requirements.

Table 2: Cereal imports of LIFDCs in Africa (thousand tonnes)

Region	2017/18 or 2018	2018/19 or 2019		2019/20 or 2020	
	Actual imports	Import forecast	of which food aid	Import requirement[18]	of which food aid
Africa (37 countries)	29 495	27 439	1 008	30 229	1 163
East Africa	12 207	11 034	698	12 005	818
Southern Africa	3 140	2 770	15	3 514	19
West Africa	11 561	10 976	139	12 029	170
Central Africa	2 587	2 658	156	2 681	156

Source: FAO (2020)[19]

[15] The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

[16] FAO. 2020. Crop Prospects and Food Situation - Quarterly Global Report No. 1, March 2020. Rome.

[17] The 5 year average refers to the 2014-2018 period

[18] Import requirement is the difference between utilization (food, feed, other uses, exports plus closing stocks) and domestic availability (production plus opening stocks)

[19] FAO. 2020. Crop Prospects and Food Situation - Quarterly Global Report No. 1, March 2020. Rome.https://doi.org/10.4060/ca8032en

7.1 East Africa

The East Africa region estimate for 2019 cereal output is 53.3 million tons, 8.2% below last year's output (Table 3) (FAO, 2020). Above average rainfall in October – December improved cropping conditions and contributed to better harvests but also fostered the upsurge of desert locusts.

Table 3: East Africa cereal production (million tonnes)

Country	Wheat			Coarse grains			Total cereals[20]			
	5-yr Avg[21].	2018	2019 estim.	5-yr Avg.	2018	2019 estim.	5-yr Avg.	2018	2019 estim.	Change: 2019/2018 (%)
East Africa	5.6	6.0	5.9	44.0	47.8	43.6	53.3	58.0	53.3	-8.2
Ethiopia	4.6	4.8	4.8	21.1	22.8	22.6	25.8	27.8	27.6	-0.7
Kenya	0.2	0.4	0.3	3.9	4.4	3.6	4.3	4.9	4.0	-19.3
Sudan	0.6	0.7	0.7	6.3	8.1	5.2	7.0	8.9	6.0	-32.9
Uganda	0.0	0.0	0.0	3.3	3.3	3.2	3.5	3.5	3.5	-2.0
Tanzania	0.1	0.1	0.1	7.4	7.3	6.9	10.5	10.7	10.1	-6.0

Source: FAO (2020)

The projected food security classification for the East Africa region for February to May 2020 is presented in Figure 14. The recent floods in parts of the East African region are expected to increase the number of food insecure people. The worse food security outcomes ranging from stressed to emergency classification across parts of the region have been driven by recovery from prior drought, recent flooding, poor macroeconomic conditions and protracted conflict and displacement (FEWSNET East Africa, 2019).

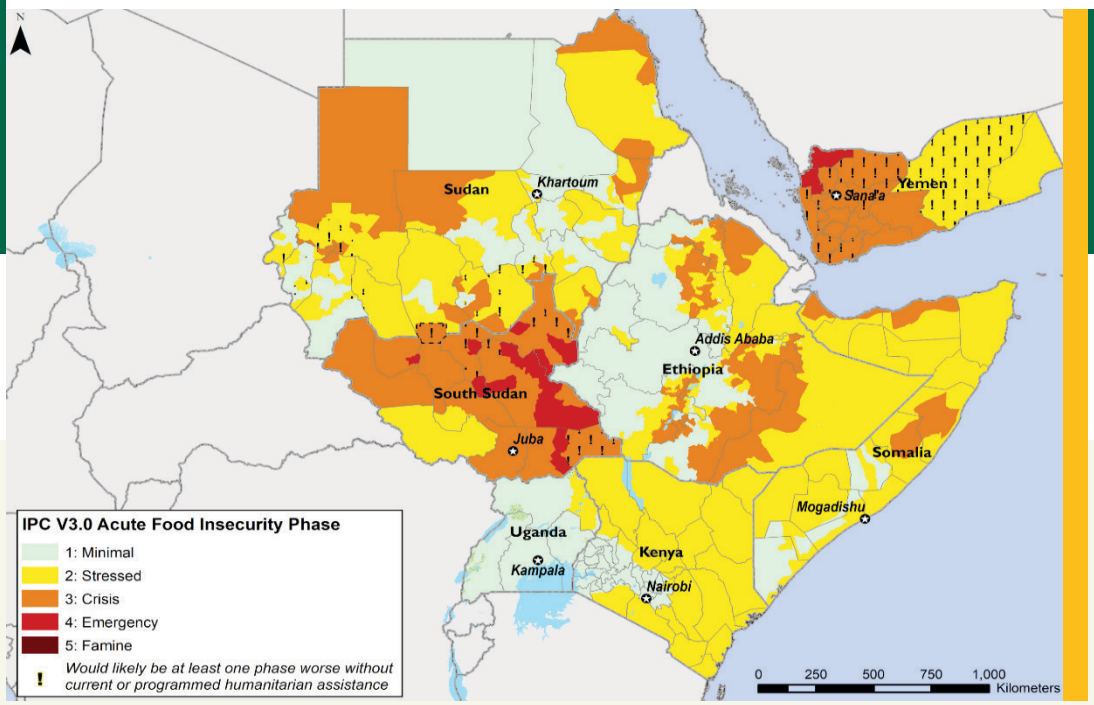


Figure 14: East Africa Food Security Classification (February 2020 - May 2020)
Source: FEWSNET East Africa (2019)

[20] Total cereals includes wheat, coarse grains and rice (paddy)

[21] The 5 year average refers to the 2014-2018 period

7.2 Southern Africa

Most parts of the region experienced favourable rainfall from mid-January to early February that helped improve crop conditions where they had not yet wilted despite drier conditions at the beginning of the season. This is expected to contribute to increased 2020 harvests from a low cereal outturn in 2019. However, erratic distribution and below average rainfall totals significantly affected production in some parts such as in Botswana, Namibia, Zimbabwe, Madagascar and southern Mozambique (FAO, 2020).

Table 4: Southern Africa cereal production (million tonnes)

Country	Wheat			Coarse grains			Rice (paddy)			Total cereals[22]			
	5-yr Avg.	2018	2019 estm.	5-yr Avg.	2018	2019 estm.	5-yr Avg.	2018	2019 estm.	5-yr Avg.	2018	2019 estm.	Change: 2019/2018 (%)
Southern Africa	2.0	2.1	1.8	26.2	27.0	23.8	4.2	4.1	4.5	32.3	33.2	30.1	-9.1
- excl S. Africa	0.3	0.3	0.2	12.7	13.3	11.5	4.2	4.1	4.5	17.2	17.6	16.2	-7.8
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.6	3.3	3.9	3.9	3.5	4.1	16.8
Malawi	0.0	0.0	0.0	3.2	2.9	3.6	0.1	0.1	0.1	3.3	3.0	3.7	22.6
Mozambique	0.0	0.0	0.0	2.1	2.8	2.5	0.4	0.5	0.3	2.5	3.4	2.8	-15.8
South Africa	1.7	1.9	1.6	13.4	13.7	12.3	0.0	0.0	0.0	15.1	15.6	13.9	-10.6
Zambia	0.2	0.1	0.2	3.0	2.5	2.1	0.0	0.0	0.0	3.3	2.7	2.3	-14.5
Zimbabwe	0.0	0.1	0.1	1.5	1.9	0.9	0.0	0.0	0.0	1.6	2.0	0.9	-52.7

Source: FAO (2020)

Figure 15 presents the Southern Africa food security classification for the period February 2020-May 2020. Poor 2019 harvest, high market prices above average, conflict in the DRC and volatile macro-economy in Zimbabwe contributed to high food insecurity in these countries. Parts of DRC, Madagascar, Mozambique and Zimbabwe are the most food insecure with classifications between stressed and crises levels. These outcomes are despite the large-scale humanitarian assistance in parts of these countries (FEWSNET Southern Africa, 2019)[23]. The forecasts for the 2019/20 cropping season indicate a below-average season in many parts of the Southern Africa region. The combination of below average rainfall and poor access to agricultural inputs in parts of the region would adversely affect livelihood opportunities, household incomes and the 2020 harvest (FEWSNET Southern Africa, 2019).

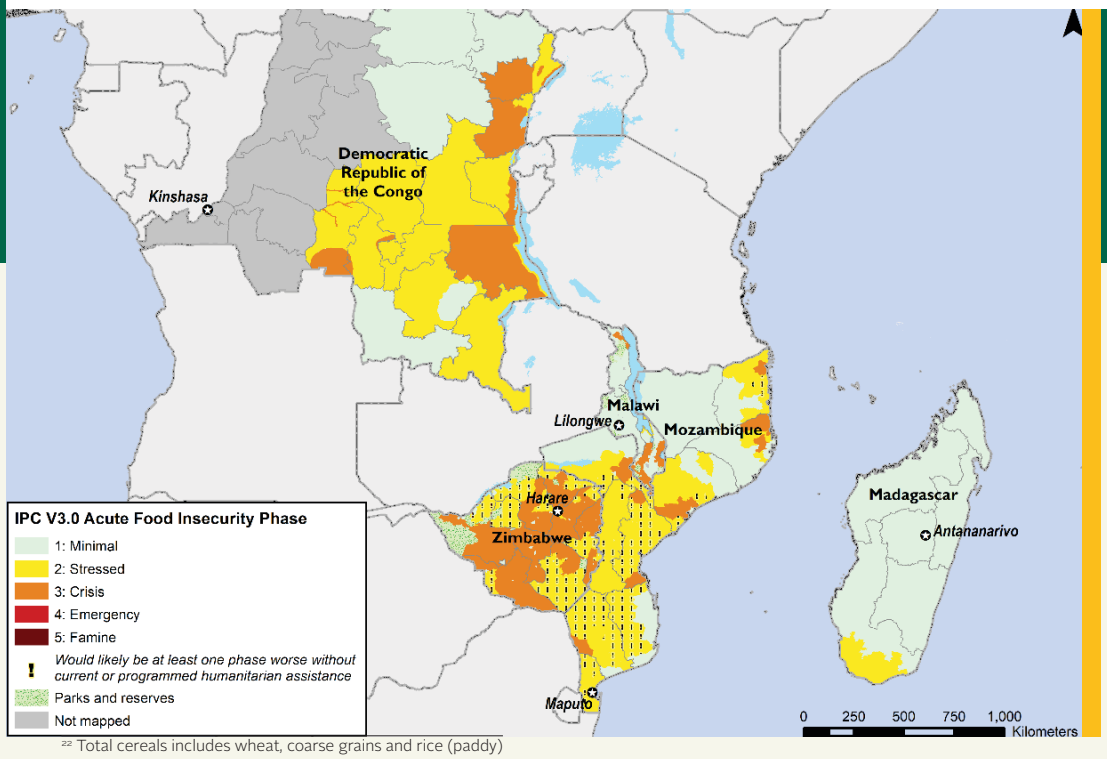


Figure 15: Southern Africa Food Security Classification (February 2020 - May 2020)
Source: FEWSNET Southern Africa (2019)

[22] Total cereals includes wheat, coarse grains and rice (paddy)

[23] FEWSNET Southern Africa. 2019. Southern Africa Food Security Outlook: Erratic start of the 2019/20 rainfall season will likely affect crop production and agriculture labour, November 2019 to May 2020, FEWSNET

7.3 West Africa

Crop production in the West African region has been constrained by civil insecurity and localized dry weather conditions. Table 5 presents West Africa cereal production estimates. Countries expected to experience localized shortfalls in cereal production due to unfavourable seasonal rainfall include Carbo Verde, the Gambia, Mauritania and Senegal. In addition, persisting insecurity and large-scale population displacements are affecting agricultural activities in northeast Nigeria, the Lake Chad Basin, the Lac and Tibesti regions of Chad, northern and central Mali and the Liptako Gourma region that include parts of Burkina Faso, Mali and Niger. Outbreaks of Fall Armyworm and locusts have also contributed to crop losses in many countries: Chad, Burkina Faso, Mali and Niger. Despite the expected above-average 2019 cereal production in West Africa, food insecurity levels remain high particularly in conflict-affected northern Nigeria, Lake Chad Basin and Liptako Gourma region.

Table 5: West Africa cereal production (million tons)

	Coarse grains			Rice (paddy)			Total cereals[24]			
Country	5-yr Avg.	2018	2019 estim.	5-yr Avg.	2018	2019 estim.	5-yr Avg.	2018	2019 estim.	Change: 2019/2018 (%)
West Africa	46.2	52.4	52.4	18.2	20.6	21.3	64.5	73.1	73.8	0.9
Burkina Faso	4.1	4.8	4.7	0.3	0.4	0.4	4.5	5.2	5.0	-2.9
Chad	2.5	2.8	2.7	0.3	0.3	0.3	2.8	3.0	3.0	-1.8
Ghana	2.3	2.8	3.3	0.7	0.8	0.9	3.0	3.6	4.2	17.3
Mali	6.1	7.0	7.1	2.6	3.2	2.9	8.8	10.2	10.0	-1.7
Niger	5.5	6.0	5.5	0.1	0.1	0.1	5.7	6.1	5.7	-6.9
Nigeria	18.7	21.4	21.4	7.8	8.9	9.6	26.6	30.4	31.0	1.9

Source: FAO (2020)

Figure 16 present projected food security outcomes for West Africa between February 2020 and May 2020. Security incidents and displacements have disrupted agricultural activities around the Sahelian area with the displaced populations expected to face crises food insecurity outcomes between February and May 2020 (FEWSNET West Africa, 2019). In stable parts of the regions, such as central, southern and western parts of Burkina Faso, above-average supplies in the markets due to new harvest and significant stocks from traders contributed to decreases in cereal prices and improved access to food (FEWSNET West Africa, 2019).

In parts of Mali, households have average access to cereals due to average to above-average domestic production supplies and below-average food prices. However, food insecurity is expected to increase due to early stock depletion as a result of declining agricultural production in the western Sahel and Liptako Gourma. Security crises remains a major threat to food security and household livelihoods in Niger and parts of Borno, northern Adamawa and southern Yobe states in Nigeria (FEWSNET West Africa, 2019).

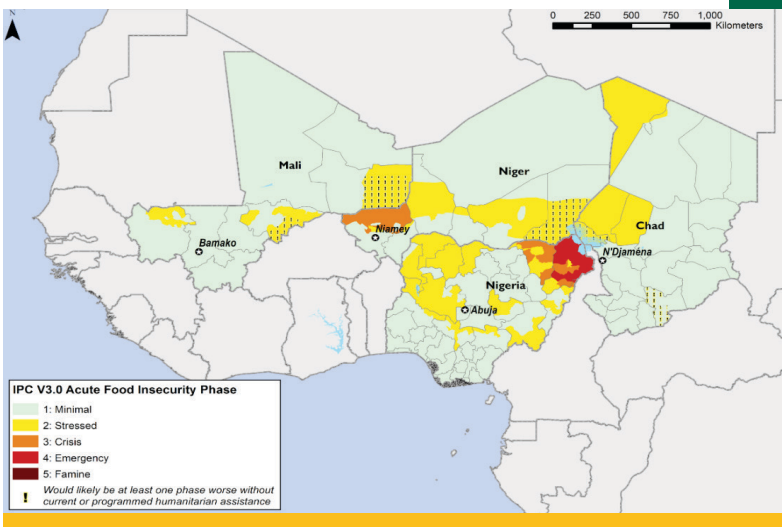


Figure 16: Projected food security outcomes, February - May 2020
Source: FEWSNET East Africa (2019)[25]

[24] Total cereals includes wheat, coarse grains and rice (paddy)

[25] FEWSNET West Africa. 2019. WEST AFRICA Food Security Outlook November to May 2020: Persistent food insecurity in conflict areas despite ongoing harvests, FEWSNET

8. CONCLUSIONS

The report presented an overview of the weather/climatic conditions, desert locust outbreak, policy developments, COVID-19 pandemic, food prices and food security situation in selected countries in East, Southern and West African regions. The main findings from the report are summarized below.

The above normal rainfall forecasts for East Africa presents favourable conditions for agricultural production for the "long rains season" starting in March/April. On the other side, the above normal rainfall forecasts increases risks of flooding and landslides and presents ideal conditions for breeding and feeding of desert locust increasing chances of further outbreaks. The ideal conditions for breeding and feeding desert locusts continue to foster their spread in the affected countries and into new areas in the region. The desert locust upsurge that has affected many countries in the region raises concerns for agriculture sector performance and food security. Food security impacts of the desert locust upsurge are expected to be significant for households in areas where swarms pass through and cause damages. February prices of coarse grains declined in most countries in East Africa due to increased market supplies from second season harvest. Despite price declines, current levels are well above a year earlier due to reduced main season harvest and heavy rains in late 2019 that disrupted agricultural and marketing activities.

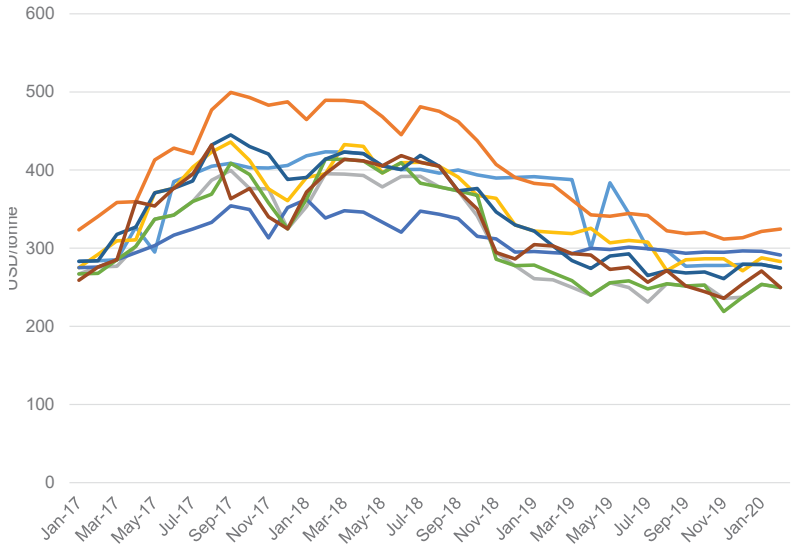
Below average rainfall across most parts of the Southern Africa region in the first three months of the cropping season caused abnormal dryness affecting crop prospects in some areas such as in Zimbabwe and Mozambique. However, favourable rains from mid-January to early February improved crop conditions and prospects for the 2020 harvests in some parts such as in Angola, Malawi and northern Zambia. The region will experience localised food shortages due to poor harvests. The region experienced mixed prices changes (increases and declines) in the past two months. For example, while maize prices increased in Malawi and Mozambique in the past two months, in Zambia prices were fairly stable during the same period. Prospects of good harvests in areas that received heavy rains between mid-January and early February such as Malawi and northern Zambia are expected to help push prices down.

The 2020 planting season is starting soon in West Africa and increased chances of above normal rainfall presents favourable conditions for agriculture. Crop production in the West African region has been constrained by civil insecurity and localized dry weather conditions. Despite the above-average 2019 cereal production in West Africa, food insecurity levels remain high particularly in conflict-affected northern Nigeria, Lake Chad Basin and Liptako Gourma region. Persisting insecurity and large-scale population displacements are affecting agricultural activities. Prices of coarse grains have been relatively stable in Sahelian countries due to good supplies from the 2019 harvests except in conflict affected areas which face market disruptions and limited availabilities. Conflict affected areas continue to experience market disruptions, low agricultural activities and displacements that are affecting movement of agricultural food commodities contributing to pushing prices up. The closure of the land borders by Nigeria in August 2019 continued to significantly affect regional marketing activities contributing to upward increase in prices in neighbouring markets.

The confirmation and spread of COVID-19 in many African countries and the rest of the world has led to implementation of measures that restrict and ban movement from "affected risk areas". Agricultural activities from production to marketing are also being affected by the ongoing COVID-19 crises and related measures to contain its spread. Restrictions on travel and social distancing measures are impacting business operations and food trade is not spared. Panic behaviour across countries uninformed government food export bans can potentially disrupt food trade and markets and push food prices up. Private sector can implement innovative e-commerce interventions to help support governments in ensuring food supplies are moved from surplus areas to areas of need.

APPENDIX 1: *Food prices in West African countries*

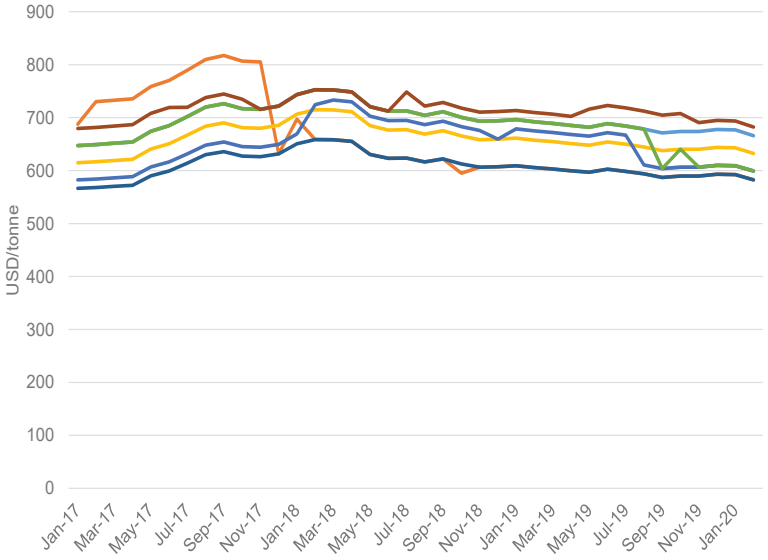
Wholesale prices of millet (local) in Burkina Faso



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Bobo Dioulasso	274.6	-1.65	-1.75	-0.79	-29.17
Dori	324.5	0.93	3.54	1.82	-10.31
Dédougou	249.6	-1.65	5.23	-0.79	-0.08
Fada N'gourma	282.9	-1.67	4.35	-0.81	-11.26
Kongoussi	291.2	-1.65	-1.79	-0.82	-0.58
Nouna	249.6	-1.65	5.23	-0.79	-3.44
Ouagadougou	274.6	-1.65	-1.75	2.31	-3.41
Tenkodogo	249.6	-7.83	-1.77	-0.79	-14.78

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of rice (imported) in Burkina Faso

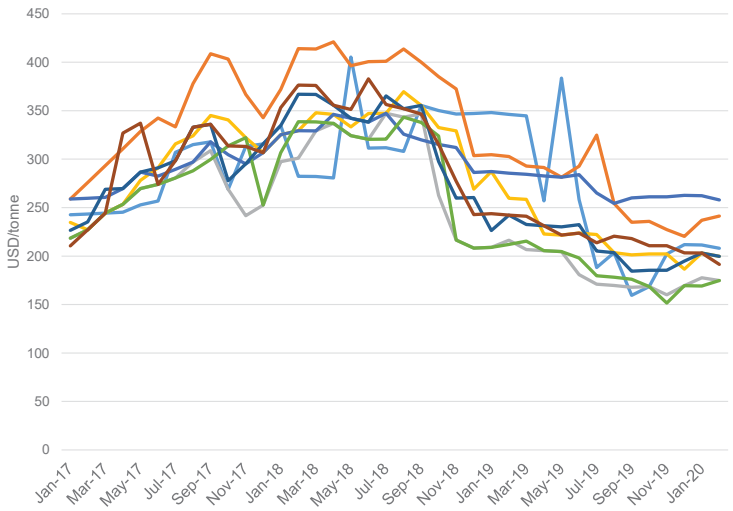


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Bobo Dioulasso	665.7	-1.65	-1.77	-0.79	-3.41
Dori	582.5	-1.65	-1.77	-0.78	-3.42
Dédougou	599.1	-1.66	-1.77	-0.79	-13.07
Fada N'gourma	632.4	-1.66	-1.77	-0.80	-3.42
Kongoussi	599.1	-1.66	-1.77	-0.79	-10.85
Nouna	599.1	-1.66	-1.77	-0.79	-13.07
Ouagadougou	582.5	-1.65	-1.77	-0.78	-3.42
Tenkodogo	682.3	-1.66	-1.77	-3.16	-3.43

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

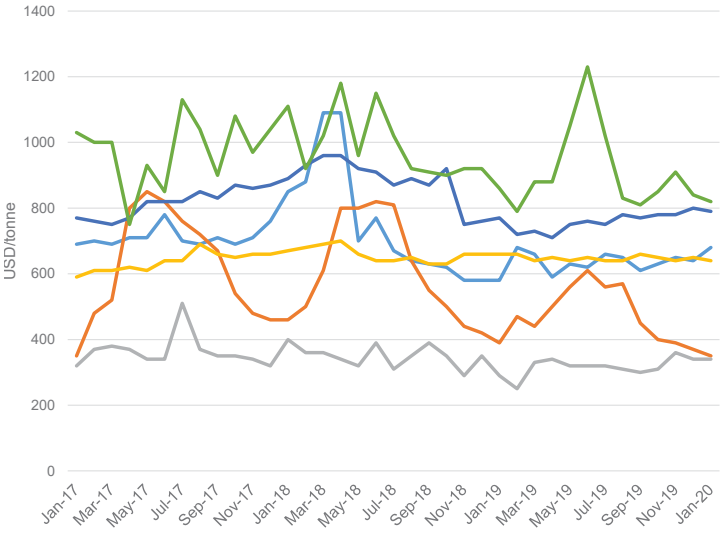
Wholesale prices of sorghum (local) in Burkina Faso



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Bobo Dioulasso	208	-1.65	-1.79	30.49	-39.64
Dori	241.3	1.86	9.53	2.72	-17.62
Dédougou	174.7	-1.69	3.13	4.11	-15.52
Fada N'gourma	199.7	-1.67	7.14	-0.79	-22.75
Kongoussi	258	-1.64	-1.75	-0.77	-9.25
Nouna	174.7	3.25	3.13	-0.80	-18.90
Ouagadougou	199.7	-1.67	2.52	8.24	-14.14
Tenkodogo	191.4	-5.76	-5.85	-12.24	-20.65

Source: Authors' construction based on data from FAO (2020)

Retail prices of selected crops in Cote d'Ivoire

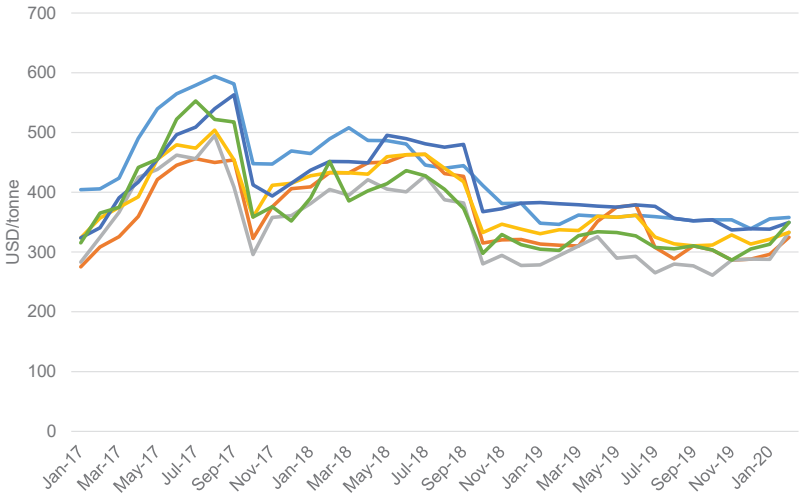


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Abidjan, Attiéké	680	6.25	4.62	4.62	0.00
Abidjan, Banana (plantains)	350	-5.41	-10.26	-38.60	-25.53
Abidjan, Cassava (fresh)	340	0.00	-5.56	9.68	36.00
Abidjan, Rice (imported)	640	-1.54	0.00	0.00	-3.03
Abidjan, Rice (local)	790	-1.25	1.28	1.28	9.72
Abidjan, Yam	820	-2.38	-9.89	-1.20	3.80

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

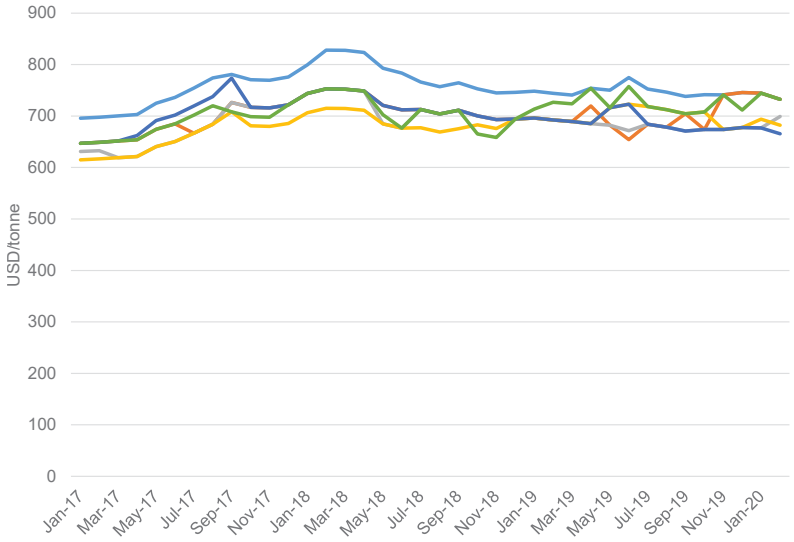
Wholesale prices of millet (local) in Niger



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Agadez	357.8	0.68	5.61	1.56	-1.11
Dosso	324.5	9.59	12.67	4.58	4.64
Maradi	332.8	15.68	15.56	20.23	7.32
Niamey	332.8	3.51	6.19	7.25	-0.95
Tillaberi	349.5	3.28	3.16	-0.79	-7.81
Zinder	349.5	11.63	14.59	12.63	6.75

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of rice (imported) in Niger

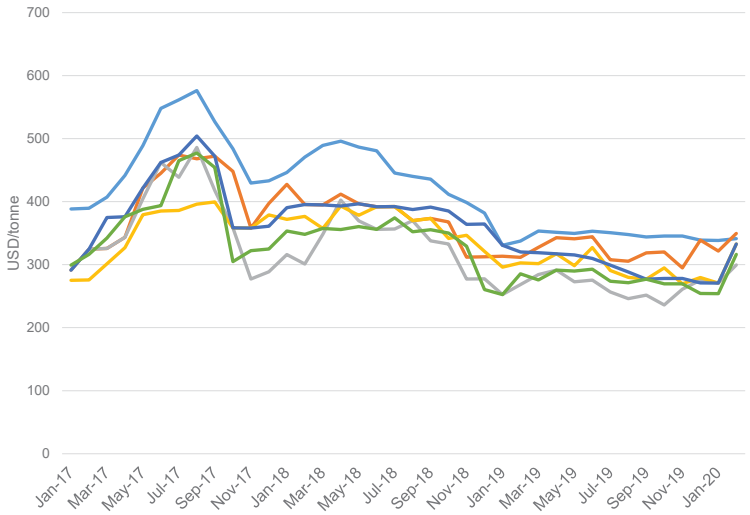


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Agadez	732.3	-1.65	-1.77	-0.79	-1.16
Dosso	732.3	-1.65	-1.77	3.93	6.25
Maradi	699	3.26	3.14	4.17	1.42
Niamey	682.3	-1.66	0.68	-3.16	-1.00
Tillaberi	665.7	-1.65	-1.77	-0.79	-3.41
Zinder	732.3	-1.65	2.91	3.93	1.19

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

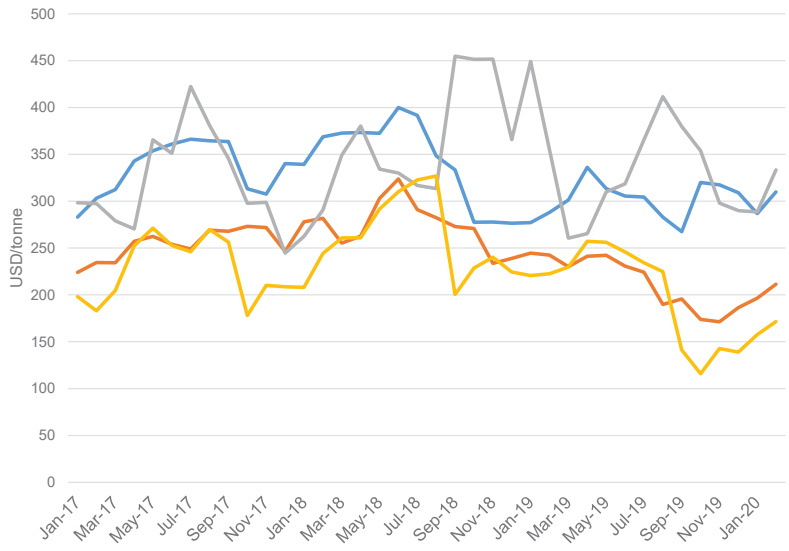
Wholesale prices of sorghum (local) in Niger



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Agadez	341.2	0.83	0.71	-0.79	-3.40
Dosso	349.5	8.71	3.16	9.66	6.75
Maradi	299.6	10.64	8.83	19.08	5.38
Niamey	332.8	22.90	19.07	20.23	10.38
Tillaberi	332.8	22.90	22.76	20.23	4.39
Zinder	316.2	24.59	24.44	14.23	14.69

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of maize in Ghana

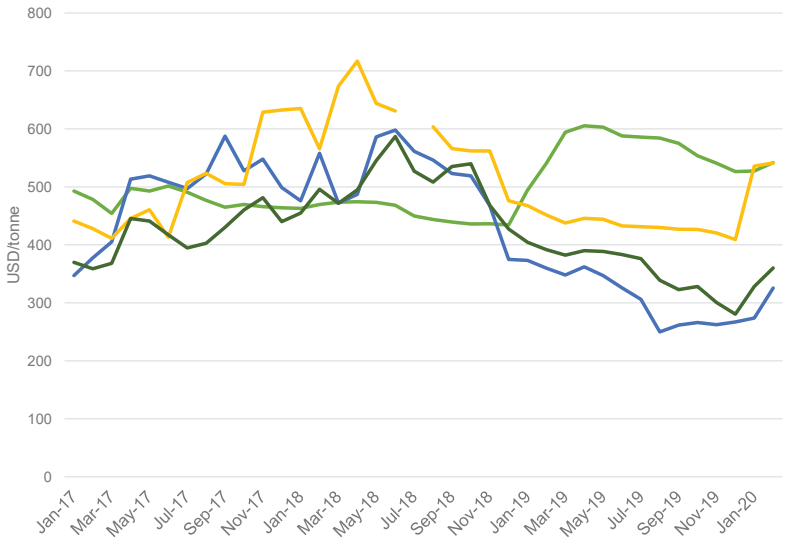


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Accra	309.8	8.06	0.26	15.81	2.86
Bolgatanga	211.4	7.58	13.35	8.02	-8.13
Kumasi	333.4	15.56	15.01	-12.22	27.94
Techiman	171.6	8.81	23.54	21.44	-25.29

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

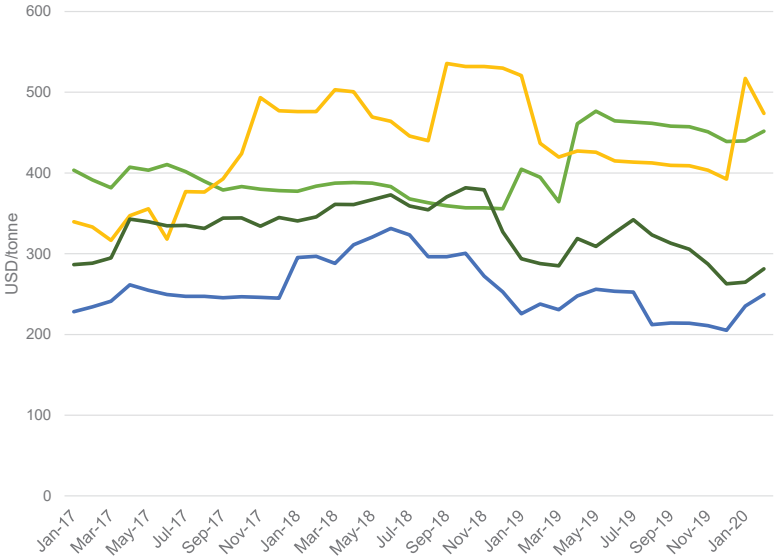
Wholesale prices of millet in Ghana



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Accra	541.75	2.73	2.93	-5.81	-8.86
Bolgatanga	325.6	18.88	21.91	24.37	-6.42
Kumasi	541.31	1.05	32.28	26.76	23.71
Techiman	360.25	9.83	28.38	11.58	-5.73

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of sorghum in Ghana

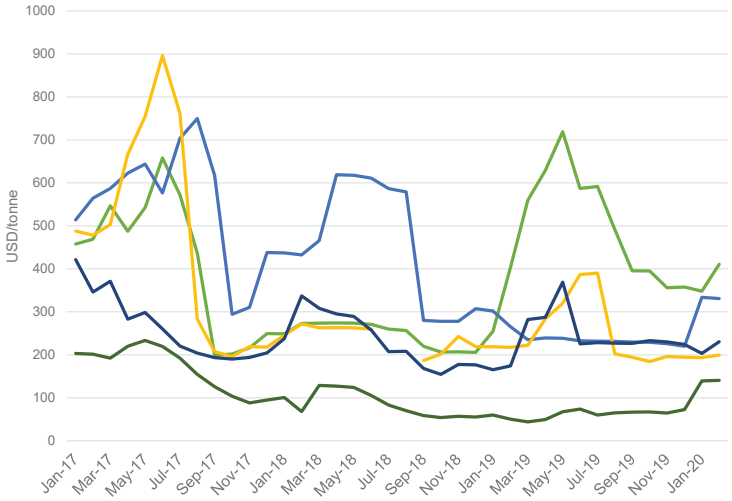


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Accra	451.62	2.72	2.91	-1.38	23.93
Bolgatanga	249.39	6.05	21.54	16.48	8.12
Kumasi	473.76	-8.37	20.73	15.69	12.91
Techiman	281.16	6.26	7.06	-10.15	-1.36

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

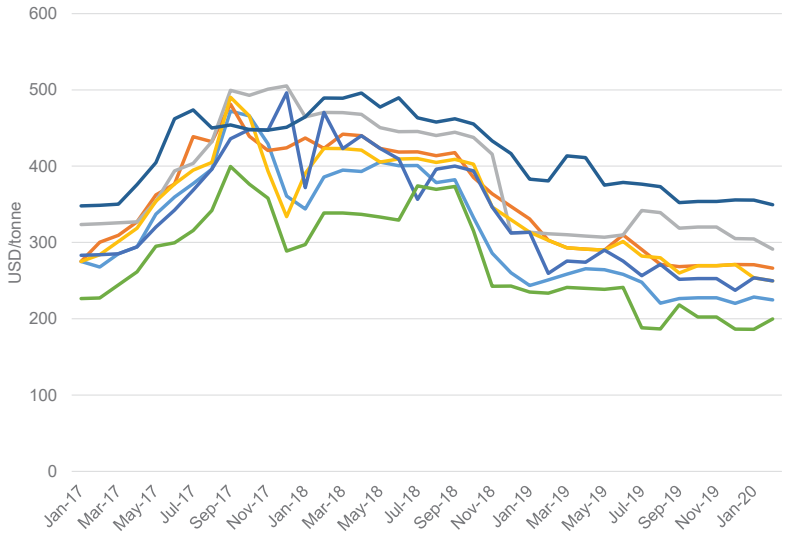
Wholesale prices of yam and cassava in Ghana



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Accra, Yam	410.8	18.09	14.77	3.82	-26.63
Kumasi, Yam	331.04	-0.86	50.50	44.21	40.77
Techiman, Yam	199.4	3.15	2.59	2.57	-10.20
Techiman, Cassava (manioc)	140.8	1.19	94.53	111.22	220.00
Accra, Cassava (manioc)	230.56	13.48	2.90	1.70	-18.28

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of millet (local) in Mali

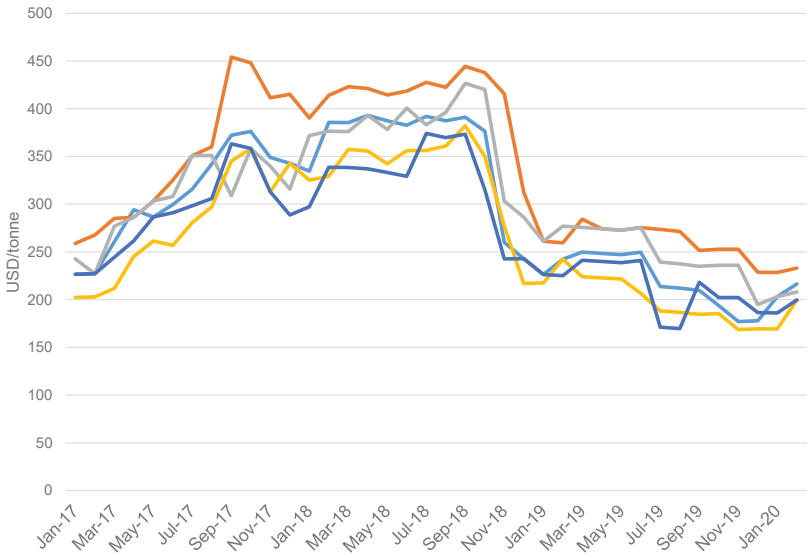


	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Bamako	224.7	-1.66	2.00	-0.79	-13.08
Gao	266.3	-1.66	-1.77	-0.78	-9.08
Kayes	291.2	-4.40	-4.52	-8.63	-6.09
Mopti	249.6	-1.65	-7.93	-4.00	-14.78
Sikasso	249.6	-1.65	5.23	-0.79	-9.47
Ségou	199.7	7.31	7.14	-8.44	-17.21
Tombouctou	349.5	-1.66	-1.77	-0.79	-15.48

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

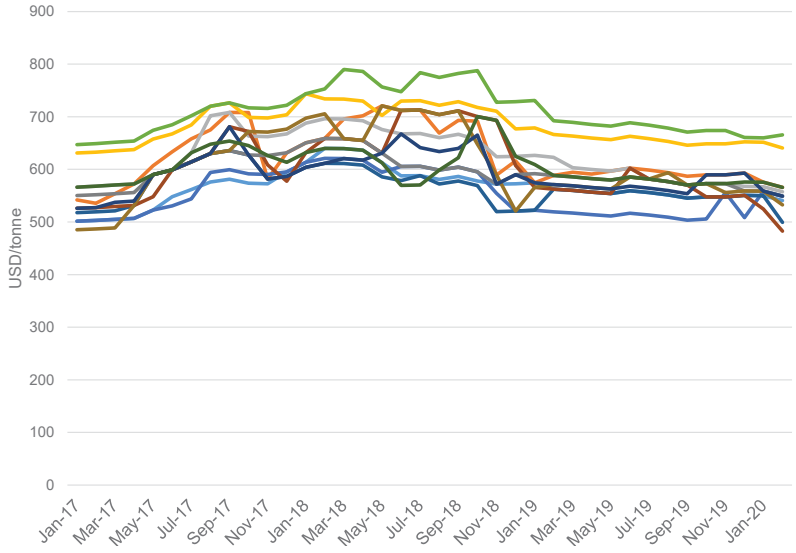
Wholesale prices of sorghum (local) in Mali



	Latest price	Percent Change			
	Feb-20	1 Month	3 Months	6 Months	1 Year
Bamako	216.4	6.55	21.64	3.20	-13.37
Kayes	233	1.97	1.88	-7.39	-18.04
Mopti	208	2.41	6.78	-11.45	-24.56
Sikasso	199.7	18.03	17.89	8.24	-10.85
Ségou	199.7	7.31	7.14	-8.44	-17.21

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of rice in Mali

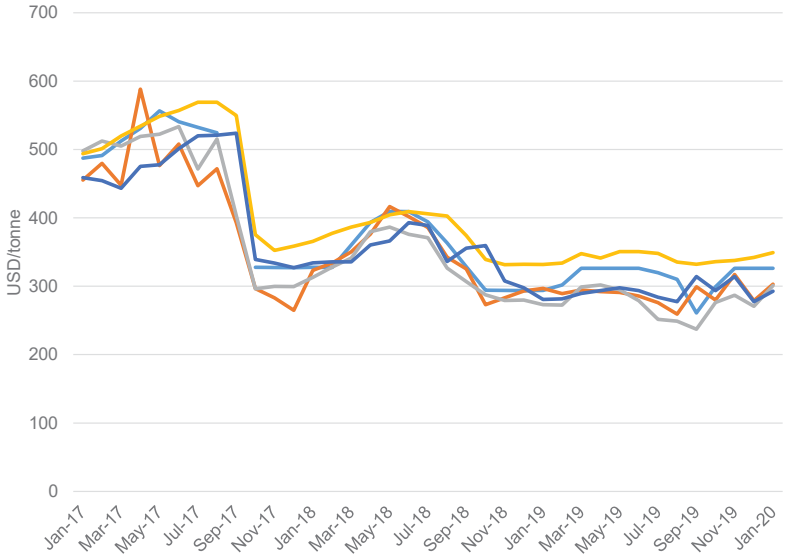


	Latest price	Percent Change		
	Feb-20	1 Month	3 Months	6 Months
Bamako, Rice (imported)	540.9	-1.65	-1.76	-0.79
Bamako, Rice (local)	565.8	-1.67	-4.59	-3.63
Gao, Rice (imported)	557.5	-1.66	-1.78	-2.26
Gao, Rice (local)	640.7	-1.66	-1.78	-0.81
Kayes, Rice (imported)	549.2	-1.65	8.05	9.12
Kayes, Rice (local)	665.7	0.86	0.74	-0.79
Mopti, Rice (imported)	499.3	-9.22	-9.32	-8.42
Mopti, Rice (local)	482.6	-8.01	-12.35	-15.39
Sikasso, Rice (imported)	549.2	-1.65	-1.77	-3.72
Sikasso, Rice (local)	532.6	-4.62	-4.74	-6.63
Ségou, Rice (local)	549.2	-1.65	-7.39	-0.79
Tombouctou, Rice (local)	565.8	-1.67	-1.77	-0.81

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

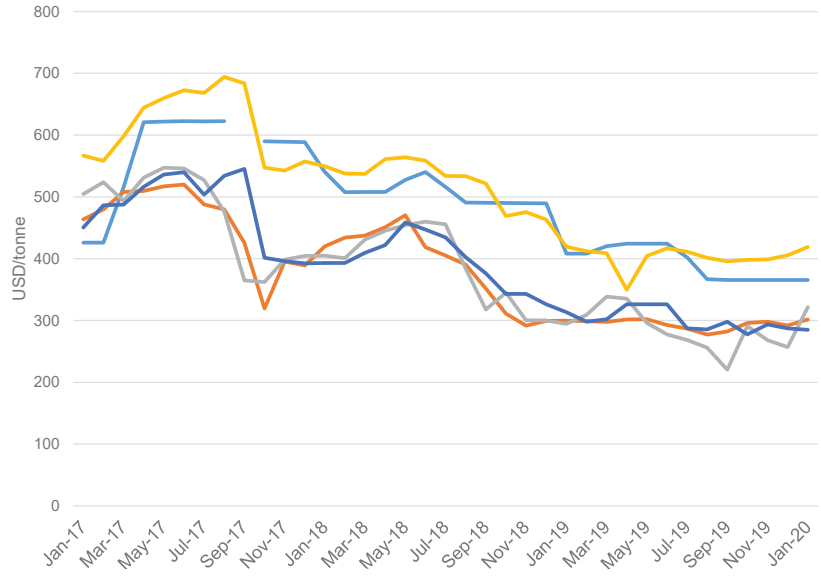
Wholesale prices of maize (white) in Nigeria



	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Ibadan	326.3	0.00	0.00	5.26	8.05
Kano	303.1	8.72	-4.45	16.94	4.77
Kaura Namoda	300.9	11.20	4.84	20.89	10.38
Lagos	349.2	2.11	3.41	4.15	4.58
Maiduguri	292.6	5.48	-6.84	5.48	3.91

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of millet in Nigeria

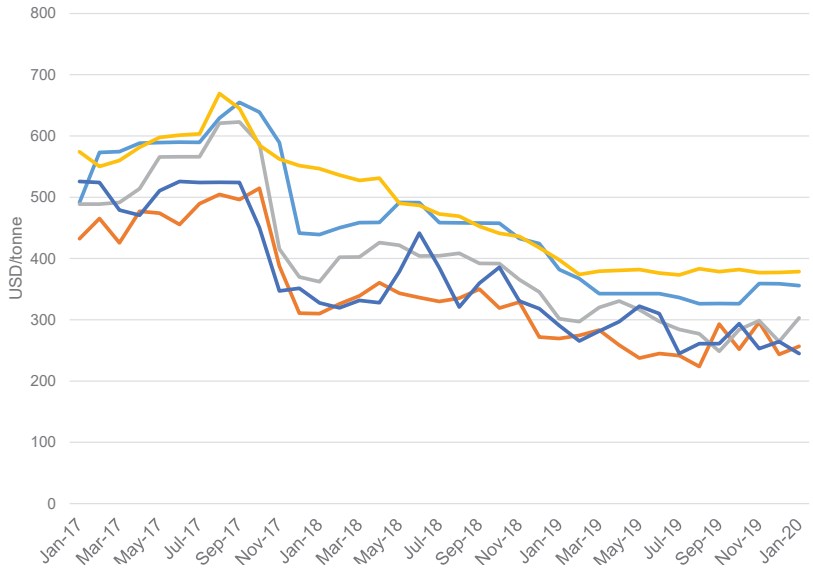


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Ye
Ibadan	365.5	0.00	0.00	-0.35	-10.4
Kano	301.7	3.32	1.31	8.88	0.9
Kaura Namoda	321.5	25.10	20.01	25.54	4.0
Lagos	418.8	3.33	4.99	4.33	1.6
Maiduguri	285	-0.77	-2.96	-0.18	-4.3

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

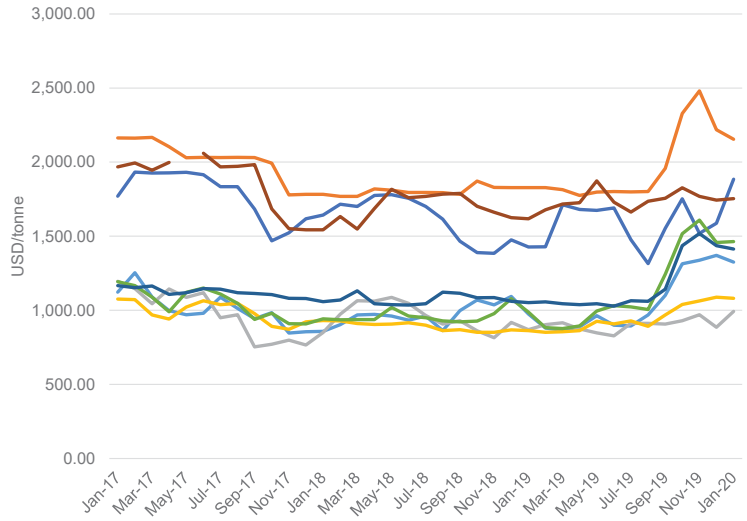
Wholesale prices of sorghum (white) in Nigeria



	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Ibadan	355.7	-0.89	-0.92	9.01	-3.16
Kano	256.5	5.30	-13.34	14.61	-6.49
Kaura Namoda	303	14.60	1.44	9.39	2.09
Lagos	378.5	0.34	0.42	-1.28	1.23
Maiduguri	244.7	-7.42	-3.24	-6.28	-7.76

Source: Authors' construction based on data from FAO (2020)

Wholesale prices of rice in Nigeria

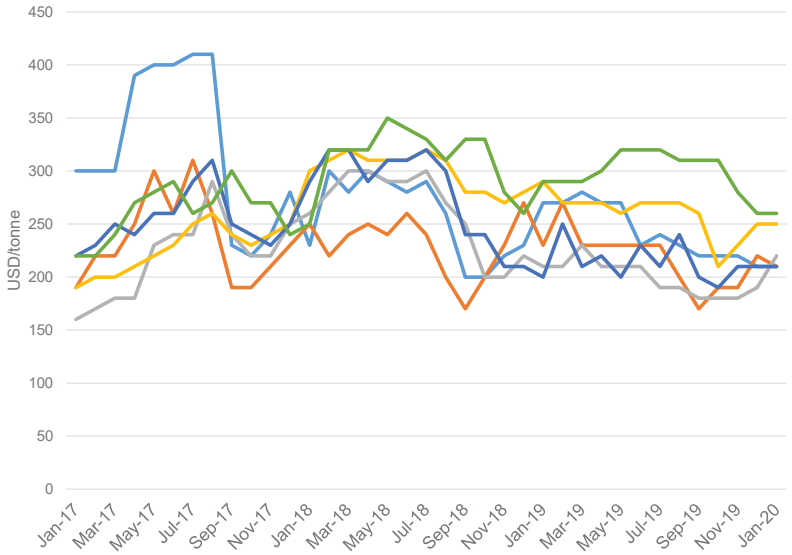


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Ibadan, Rice (imported)	1324.8	-3.34	-0.99	36.69	50.51
Ibadan, Rice (milled, local)	2153.6	-2.95	-13.16	19.55	17.79
Kano, Rice (milled, local)	993.1	12.15	2.46	8.94	9.94
Kaura Namoda, Rice (imported)	1080.8	-0.66	1.66	21.27	26.97
Kaura Namoda, Rice (milled, local)	1884.8	18.75	24.03	43.29	31.95
Lagos, Rice (imported)	1464	0.41	-9.00	45.64	65.76
Maiduguri, Rice (imported)	1414	-1.52	-6.81	33.32	33.88
Maiduguri, Rice (milled, local)	1753.4	0.55	-0.86	0.99	4.48

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

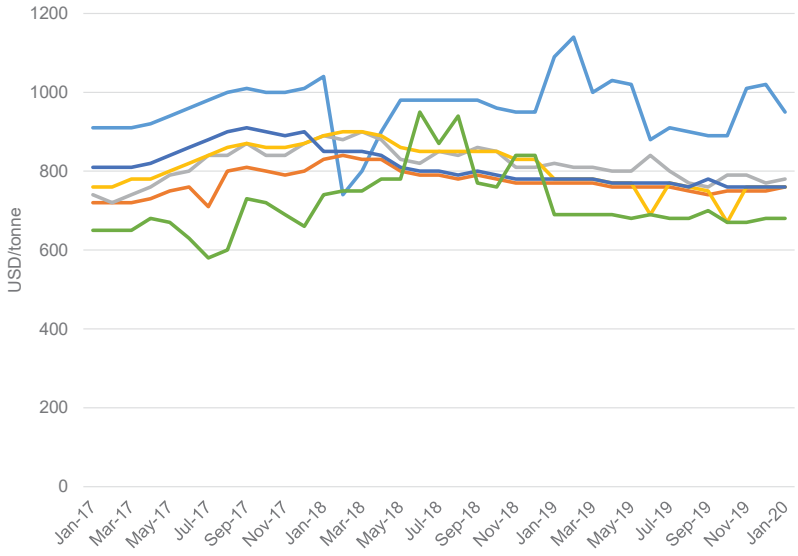
Retail prices of maize (white) in Togo



	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Amegnran	210	0.00	-4.55	-8.70	-22.22
Anie	210	-4.55	10.53	5.00	-22.22
Cinkassé	220	15.79	22.22	15.79	4.76
Kara	250	0.00	8.70	-7.41	-7.41
Korbongou	210	0.00	0.00	-12.50	-16.00
Lomé	260	0.00	-7.14	-16.13	-10.34

Source: Authors' construction based on data from FAO (2020)

Retail prices of rice (imported) in Togo

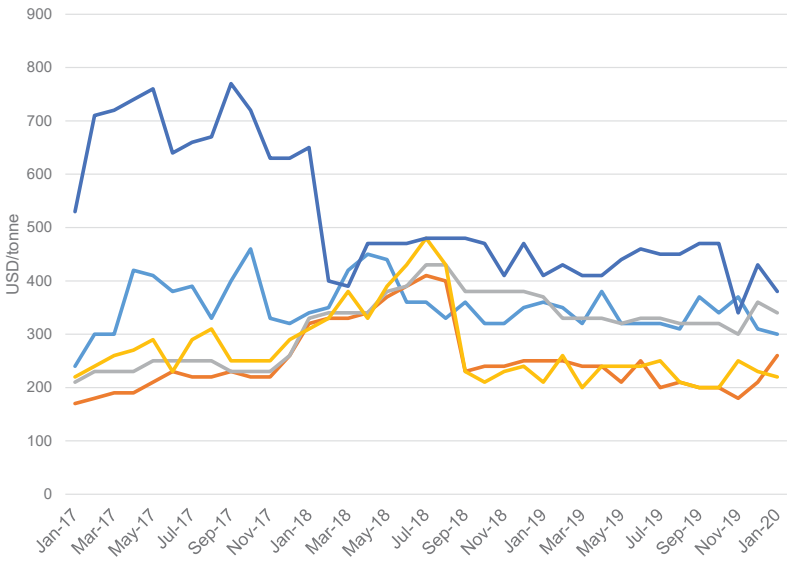


	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Amegnran	950	-6.86	-5.94	5.56	-16.67
Anie	760	1.33	1.33	1.33	-1.30
Cinkassé	780	1.30	-1.27	1.30	-3.70
Kara	760	0.00	0.00	0.00	-2.56
Korbongou	760	0.00	0.00	0.00	-2.56
Lomé	680	0.00	1.49	0.00	-1.45

Source: Authors' construction based on data from FAO (2020)

Appendix 1: Food prices in West African countries

Retail prices of sorghum in Togo



	Latest price	Percent Change			
	Jan-20	1 Month	3 Months	6 Months	1 Year
Anie	300	-3.23	-18.92	-3.23	-14.29
Cinkassé	260	23.81	44.44	23.81	4.00
Kara	340	-5.56	13.33	6.25	3.03
Korbongou	220	-4.35	-12.00	4.76	-15.38
Lomé	380	-11.63	11.76	-15.56	-11.63

Source: Authors' construction based on data from FAO (2020)

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