

FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

#2 - April 2020



BILL & MELINDA
GATES foundation



REGIONAL HIGHLIGHTS



West Africa

- West Africa is projected to experience above normal rains in May
- The favourable rains coincide with the planting that started in March for the main season across the southern parts of the region
- Insecurity and armed conflict in the Lake Chad Basin and the Central Sahel areas resulting in destruction/closure of livelihoods and basic social services, disruption of: productive activities (including agriculture), markets and trade flows
- Prices of staple foods remain below average except in deficit and conflict affected areas
- Most of the region is expected to experience Minimal (IPC Phase 1) food insecurity outcomes up to September 2020

Southern Africa

- The consecutive poor seasons and extended dry conditions at the beginning of the season resulted in perpetual below average yields in many parts of the region such as in southern Mozambique, Madagascar and Zimbabwe
- Worsening macroeconomic shocks, consecutive droughts and poor access to productive inputs contributing to dire food security outcomes in Zimbabwe
- Food trade environment in the surplus countries critical to ensure no trade impeding measures such as export bans are implemented especially in the face of the COVID-19 pandemic
- Recurring climate shocks in Southern Africa significantly contributing to reduced food production and driving staple food prices up

East Africa

- Favourable rains and cropping conditions expected to contribute to improved seasonal harvests and food availability at the end of the season
- Desert locust upsurge situations remains a threat in East Africa with new generation of swarms forming and maturing
- Areas with limited control measures and already experiencing severe food insecurity (IPC Phase 2+) outcomes are expected to severely suffer from the desert locust threat due to low coping capacity and significant crop losses
- Below average 2019 cereal outputs and difficult macroeconomic conditions contributed to high prices above the levels of the previous year
- EAC member states signed Administrative Guidelines to facilitate movement of goods and services during the COVID-19 pandemic

1. INTRODUCTION

The report discusses the food security situation in AGRA Regional Food Trade and Resilience Initiative's focus countries in East, Southern and West Africa. The focus 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 discussion issues include: changes/ forecast of rainfall, temperature and environmental conditions in the recent and near future; review of government interventions that impact on food trade (domestic and regional); overview assessment of prices of main food staples and food security outlook. The discussion focuses on implications of the developments and changes in each of the above on regional food trade and food security.

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

2.1 East Africa

The May 2020 rainfall and temperature forecast from the IGAD Climate Prediction and Application Center indicate that that Kenya, eastern Uganda, Rwanda, central Burundi, Somalia, much of Ethiopia, eastern South Sudan, Djibouti, Eritrea and Sudan are expected to experience above normal rainfall (Figure 1). The rest of the region is expected to receive normal rainfall during this period. The temperature forecast indicate warmer than normal temperatures for some areas such as most parts of Uganda, western Rwanda, central, coastal and part of eastern Kenya, coastal Tanzania and southern part of Ethiopia. Figures 2 and 3 presents the cropping conditions and agricultural stress index from the Crop Monitor for Early Warning which also confirm that most parts of the region will experience favourable cropping conditions for the current main rains cropping season. The favourable rains and cropping conditions will contribute to improved seasonal harvests and food availability at the end of the season. The combination of favourable climatic conditions and other factors such as access to productive inputs will be important in realising expected good harvests for the region. However, in East Africa the ongoing desert locust upsurge poses a threat to food production in affected parts of Ethiopia, Kenya, Somalia and Uganda. Overall, the expected good seasonal harvest will likely contribute to improve food availability in the region and food price reductions. The combination of increased food availability and price reductions especially for staple foods will help ease access to food in the region although there are threats from new upsurge of desert locust as well as impacts of the current COVID-19 pandemic.

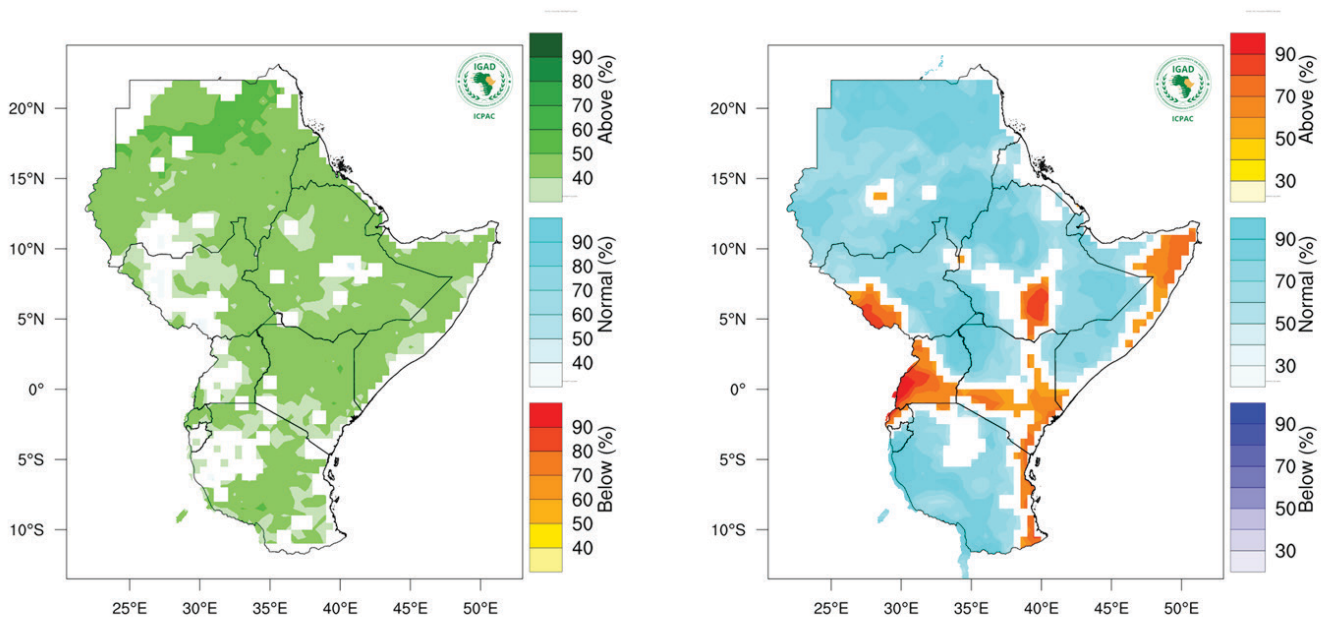


Figure 1: East Africa Rainfall and Temperature Forecast May 2020

Source: ICPAC (2020)

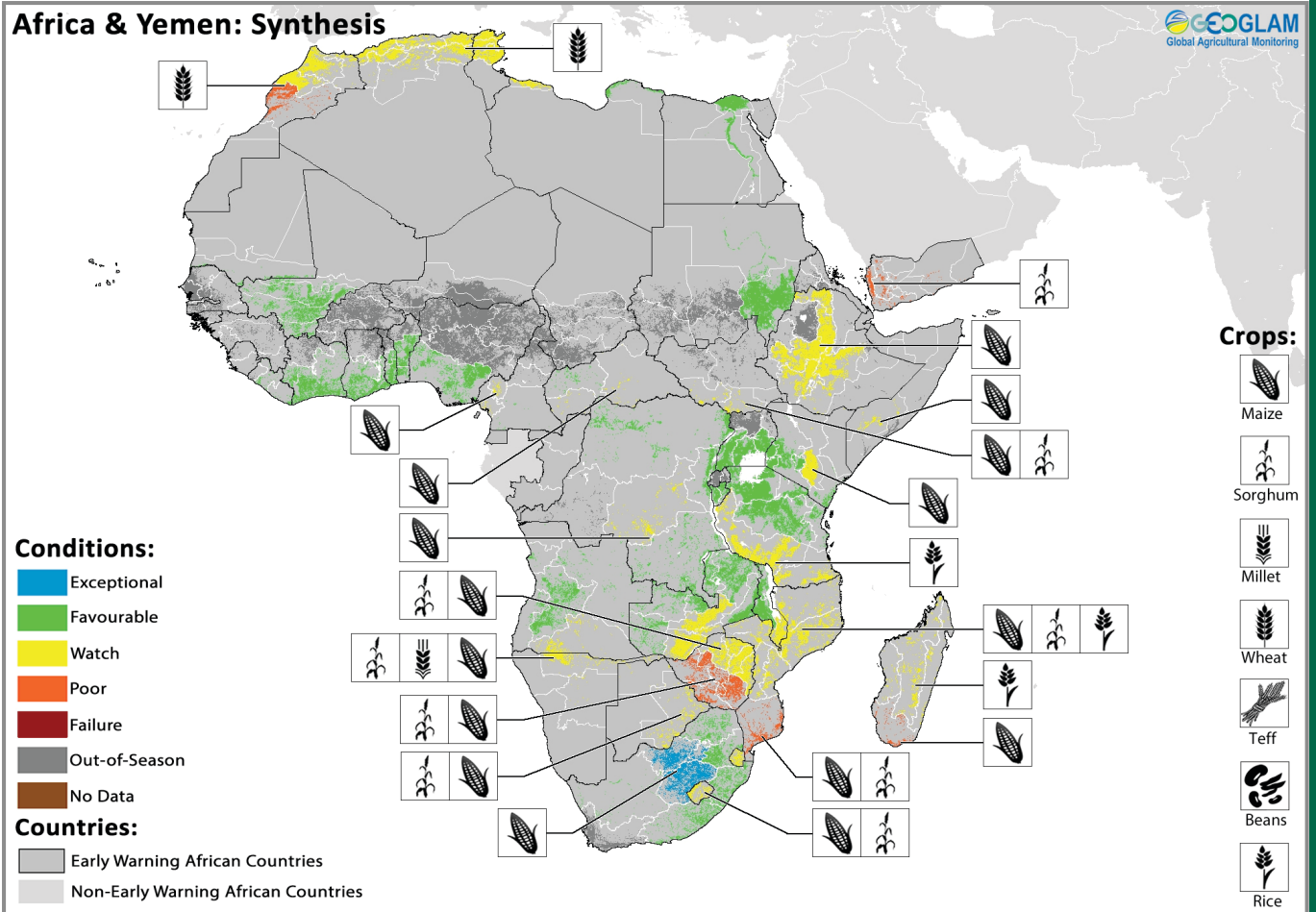


Figure 2: Synthesis of crop conditions as of 28 March 2020

Source: <https://cropmonitor.org/> Accessed 18 April 2020

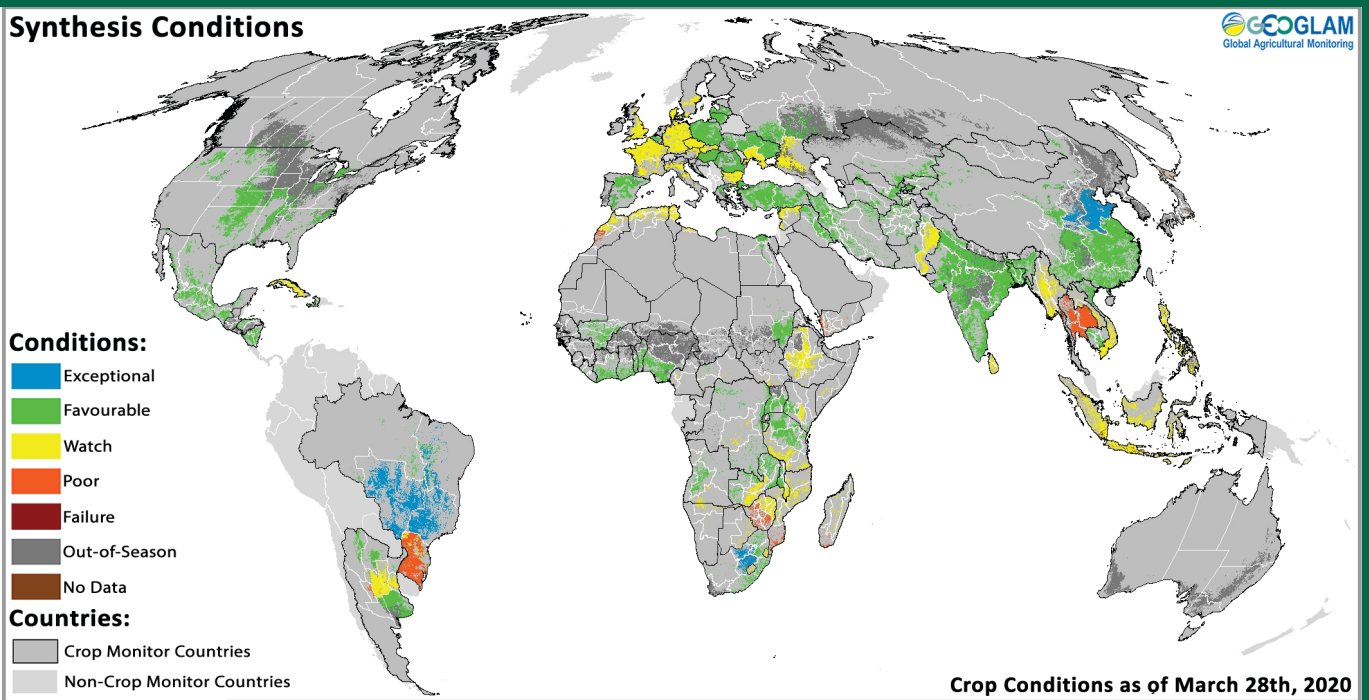


Figure 3: Agricultural Stress Index – start of season 1 to dekad 1 April 2020

Source: http://www.fao.org/giews/earthobservation/asis/data/nrt/ASI/ot2010h_aC1_s1_g2.png
 Accessed 18 April 2020

2.2 Southern Africa

Figures 4 and 5 present forecasts of precipitation anomalies and temperature in Africa for the month of May 2020 respectively. Southern Africa is currently in the harvesting period of the main cropping season and most parts of the region will be dry in the month of May except in parts of South Africa that are entering into winter planting. Heavy rainfall received in January and February improved cropping conditions across the region (Figures 2 and 3 above). This could be important for late planting crops especially for areas that were affected by the dry conditions at the beginning of the season. Improved rainfall and cropping conditions in January and February and access to improved seeds such as in South Africa, Malawi and Zambia contributed to expected good harvests. However, some parts that experienced severe dry conditions and erratic rainfall at the beginning of the season (such as eastern Botswana, southern Madagascar, southern Malawi, central and southern Mozambique and parts of Zimbabwe) could not recover and are expected to experience no and or below average seasonal harvests. This has affected food availability and increased food insecurity crises in the affected areas. The extended dry conditions negatively affected planted area, crop development, production and expected yields in the affected areas (GEOGLAM, 2020¹). The consecutive poor seasons resulted in sustained low availability and access to food in the affected areas such as in Zimbabwe. The current COVID-19 pandemic impacts across all sectors of the economy threatens to worsen food security situation especially in already food insecure areas. The movement of food from surplus areas in the region, continent and world through food trade and humanitarian assistance remains critical to address food insecurity crises, particularly in parts of Zimbabwe, southern Mozambique and Madagascar. The food trade environment in the surplus countries is critical to ensure no trade impeding measures such as export bans are implemented especially in the face of the COVID-19 pandemic.

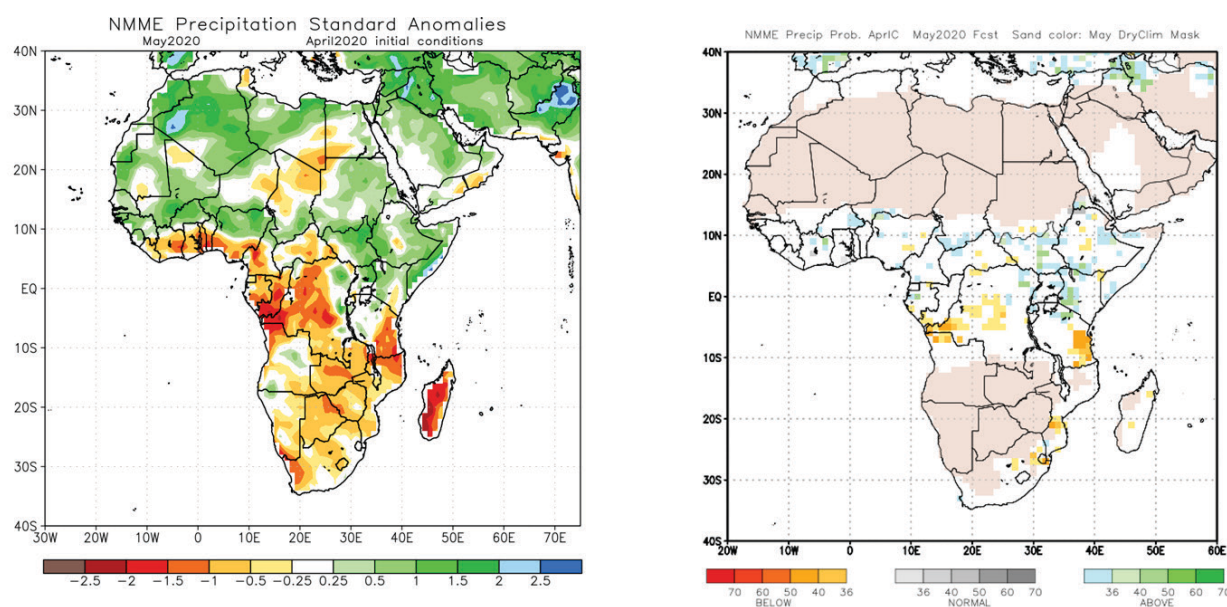


Figure 4: North American Multi Model Ensemble (NMME) rainfall forecast for May 2020, based on April 2020 initial conditions

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

¹ GEOGLAM. 2020. Crop Monitor for Early Warning. No. 48: Published April 2nd, 2020. GEOGLAM

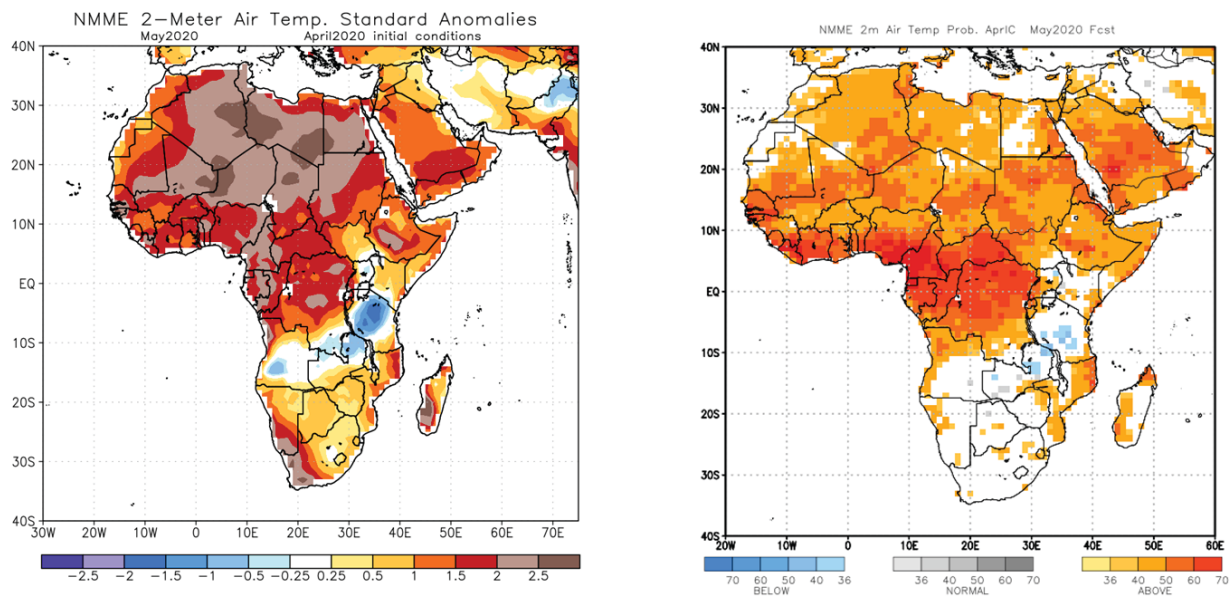


Figure 5: North American Multi Model Ensemble (NMME) temperature forecast for May 2020 based on April 2020 initial conditions

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

2.3 West Africa

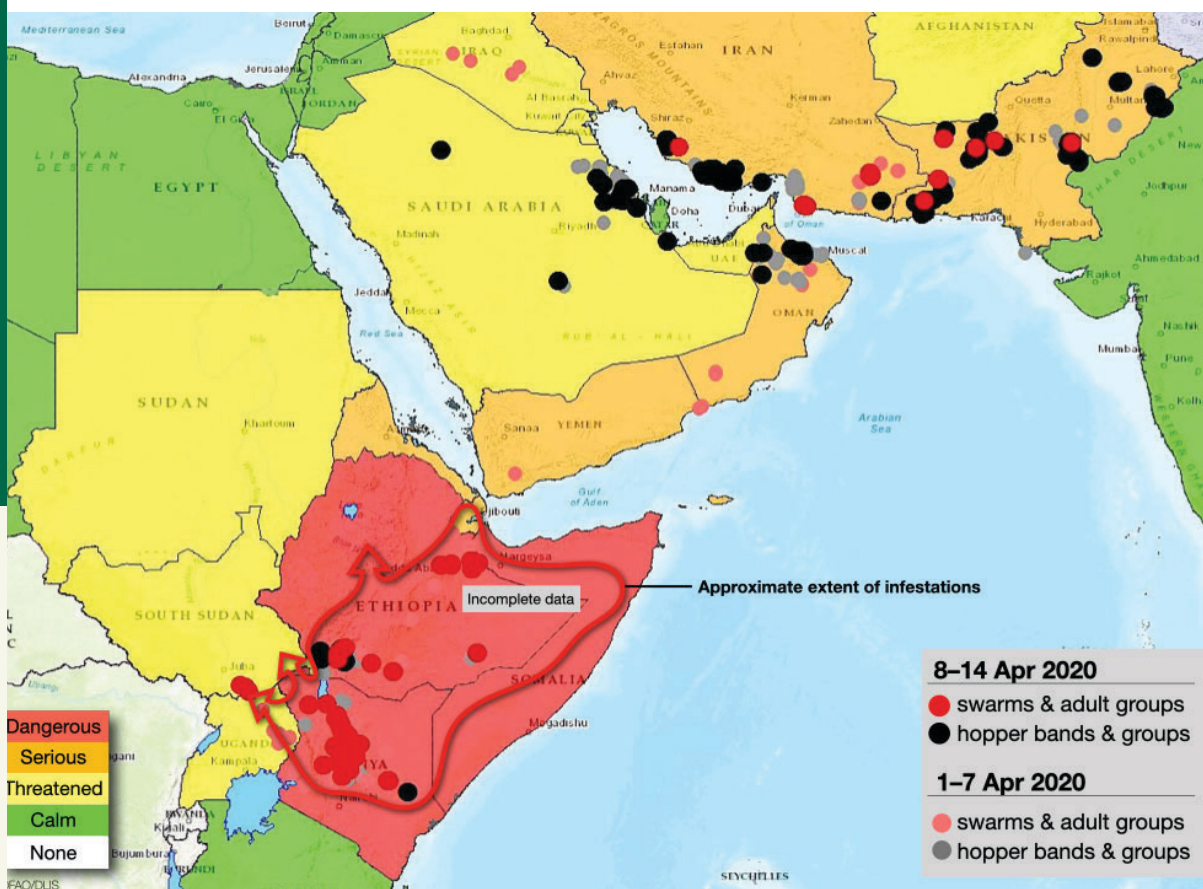
Planting started in March for the main season across the southern parts of West Africa. The rainfall forecasts (Figure 4), cropping conditions and agricultural stress index (Figures 2 and 3) are favourable for the ongoing planting and development of the crops. The conditions are favourable for another good harvest for the region that will contribute to sustain low prices and enhance availability and access to food. The areas where planting started for the main season include: including central and southern Benin, the Central African Republic, southern Cote d'Ivoire, southern Ghana, central and eastern Liberia, southern Nigeria, central and southern Togo, southern Cameroon. The second season rice crops harvesting in Mali started and expected yields are favourable (GEOGLAM, 2020²). However, agricultural activities are impeded in areas of the region affected by persistent insecurity and armed conflict. The current COVID-19 pandemic also threatens to disrupt agricultural food systems and might impact on expected production levels.

² GEOGLAM. 2020. Crop Monitor for Early Warning. No. 48: Published April 2nd, 2020. GEOGLAM

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

The desert locust upsurge situations remains a threat in East Africa with new generation of swarms forming and maturing (Figure 6). The FAO desert locust situation April update classifies the current threat as dangerous particularly in central and northern Kenya, southern Ethiopia and Somalia. The current situation is expected to have significant threats to food security and livelihoods as it coincide with the start of the planting season in the bimodal areas (FAO, 2020³; GEOGLAM, 2020⁴). Figure 7 shows the Gro Intelligence East Africa Locust Damage Model forecast of the damage to cropland area caused by the desert locust in Ethiopia, Kenya and Somalia. Damage to the main season crops is expected if the desert locust upsurge continues in the coming months. The food security risk of the current desert locust upsurge has been worsened by favourable forecasted climatic conditions and current vegetation for the March-May main cropping season that facilitated breeding and development of the desert locust.

Measures to control the desert locust upsurge should focus on areas where planting has started for the new season to ensure the locust don't damage the new crop seedlings. However, the COVID-19 pandemic is already affecting timely access to inputs for farming activities in regions where the cropping season has just started in East and West Africa. For example, some desert locust affected areas have not received adequate pesticide supplies either through lack of pesticides or increased costs due to disruptions in transportation systems⁵. The areas with limited control measures and already experiencing severe food insecurity (IPC Phase 2+) outcomes are expected to severely suffer from the desert locust threat due to low coping capacity and significant crop losses (FSNWG, 2020)⁶.



³FAO (2020). Desert Locust situation update 14 April 2020. Food and Agriculture Organisation of the United Nations, Rome, Italy.

⁴GEOGLAM, 2020. The Crop Monitor for Early Warning. GEOGLAM: www.croplmonitor.org

⁵<https://www.bloomberg.com/news/articles/2020-03-22/coronavirus-slowing-desert-locust-response-in-east-africa>

⁶FSNWG, 2020. East Africa Desert Locust and Food Security Update: Current Upsurge Threatens Upcoming 2020 Agricultural Season. FSNWG Special Report

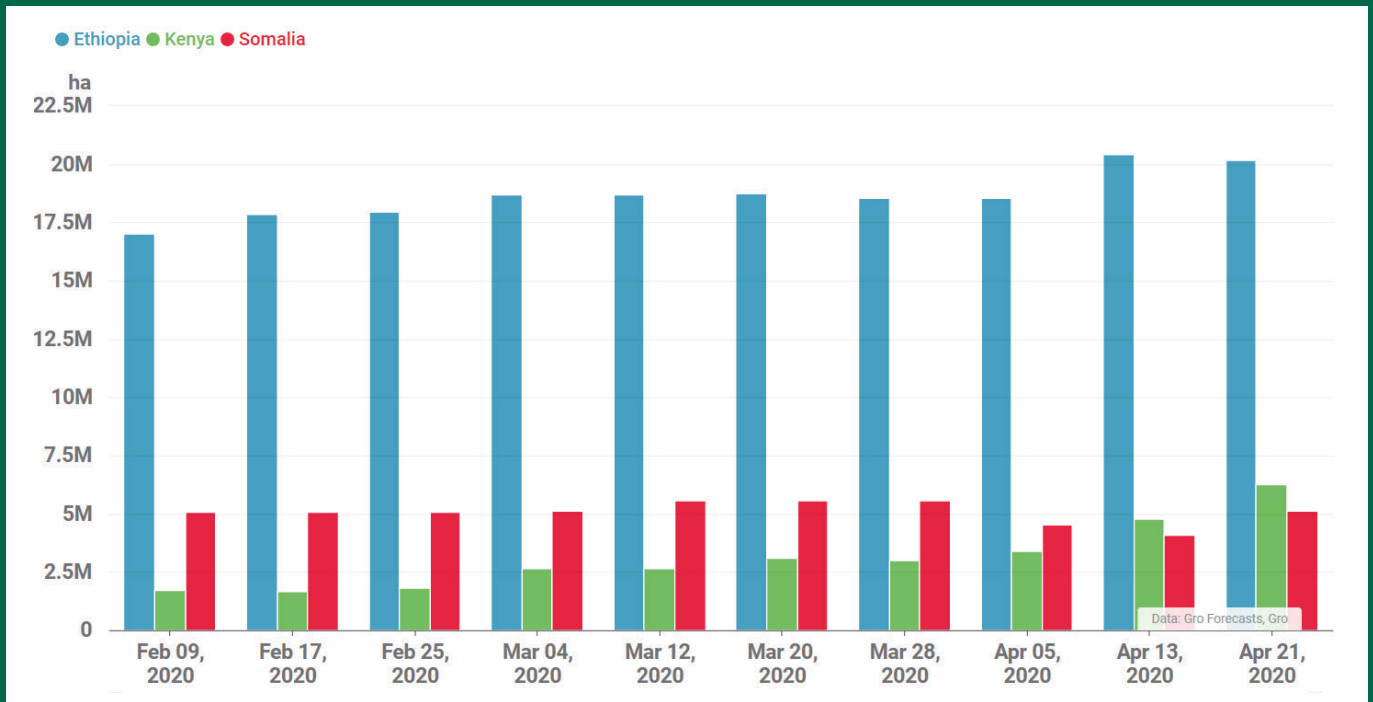


Figure 7: Locust damage (area) - cropland as of 14 April 2020

Source: Gro Intelligence: <https://app.gro-intelligence.com/displays/eVqevL6RL>. Accessed 27 April 2020

4. IMPACTS OF COVID-19 PANDEMIC AND GOVERNMENT INTERVENTIONS ON FOOD TRADE, FOOD SECURITY AND RESILIENCE

This section discusses the threats posed by the current COVID-19 pandemic on food systems with particular focus on food trade and how different government interventions to contain its spread are impacting on movement of food within and between countries. Figure 8 presents the confirmed cases of COVID-19 across the continent. All AGRA focus countries as well and the whole of the continent except Lesotho have recorded cases of COVID-19. The cases of COVID-19 continued to increase across the continent in April. The discussion does not claim to produce an impact assessment of COVID-19 and government measures to contain it but to understand the implications of the spread of the disease and instituted measures on food trade, food security and resilience. Understanding of the implications of the COVID-19 spread as well as of different government measures is important in designing interventions that can facilitate food trade and address potential food shortfalls in areas of need.

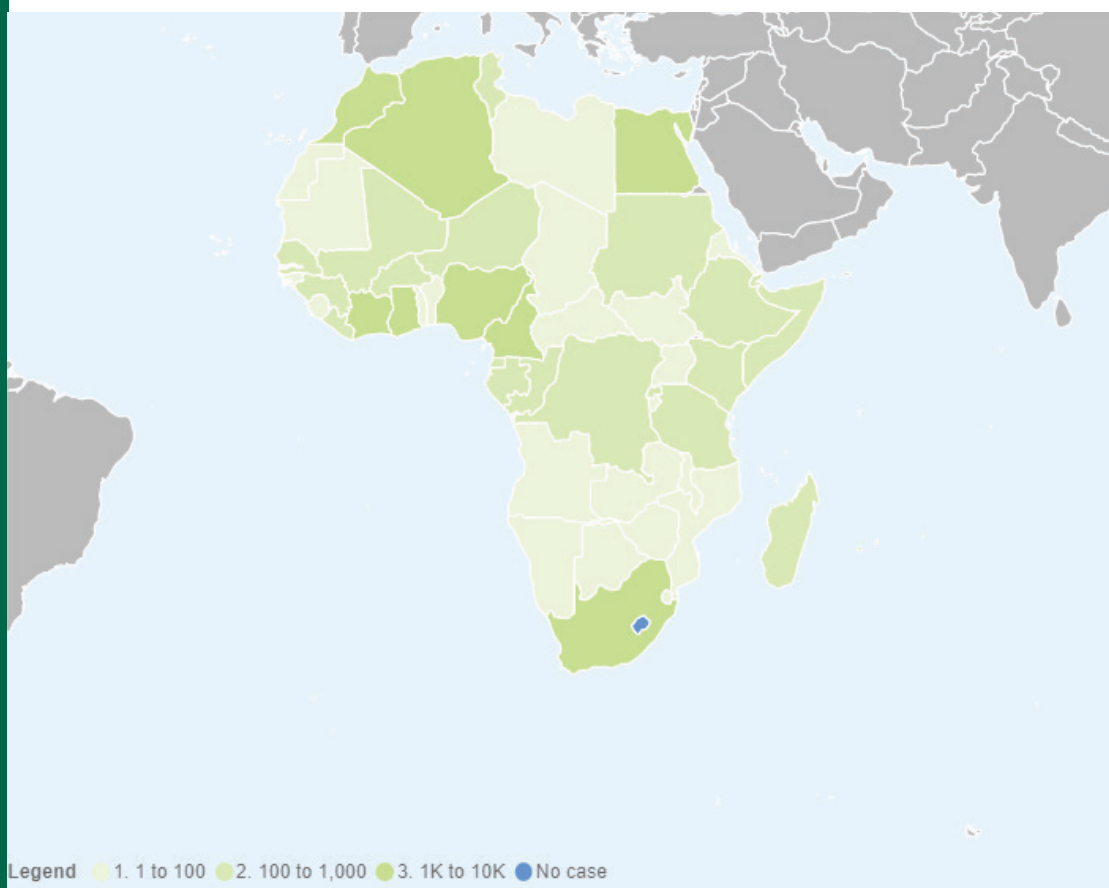


Figure 8: Confirmed cases of coronavirus (COVID-19) in Africa

Source: https://www.nutritioncluster.net/COVID_19_data_portal.

Accessed 25 April 2020

The COVID-19 pandemic shocks affects the whole food system (at national and global levels) from primary supply, processing, trade, logistical systems (national, regional and international), intermediate and final demand (Schmidhuber et al., 2020)⁷. Food trade is important to meet food and nutrition requirements in countries that experience domestic production shortfalls. Most countries in African depend on food imports from around the world (Figure 9). In 2018, Sub-Saharan countries imported \$13.7 billion worth of cereals from the world markets. The high dependency rate on world markets for food requirements exposes the food importing countries to systemic risk like price swings in the world markets (WFP, 2020). COVID-19 induced logistical challenges and disruptions on critical transport routes are expected to unsettle global markets for basic staples than food supply shortages. In addition, any measures that restrict cereal exports from the major exporting countries such as USA, Russia, and Brazil will create critical shortages that will drive price spikes and impact on food security of food import dependent countries such as in Africa.

⁷ Schmidhuber J, Pound J and Qiao B. 2020. COVID-19: Channels of transmission to food and agriculture. Rome, FAO. <https://doi.org/10.4060/ca8430en>

Significant disruptions at one or more coastal and inland chokepoints and major shipping routes could lead to supply shortfalls and price spikes. Also, commonplace disruptions contribute to delays, transport costs, spoilage affecting responsiveness of markets and drive prices up and increase volatility (Bailey and Wellesley, 2017; Wellesley et al., 2017).^{8,9} The COVID-19 pandemic has resulted in market disruptions that are already affecting normal functioning of crucial food trade ports and transport routes. Delays and cancellations of import orders have dire consequences for producers due to perishability of agricultural produce. For example, most small-holder farmers lack existing capacity to adequately store, process and or handle their produce and are expected to experience significant Post Harvest Losses (PHLs) and income losses. Income losses through these shocks increases vulnerability of farmers to other shocks and their capacity to invest in resilience building measures is reduced as the remaining limited resources are prioritised for more basic needs.

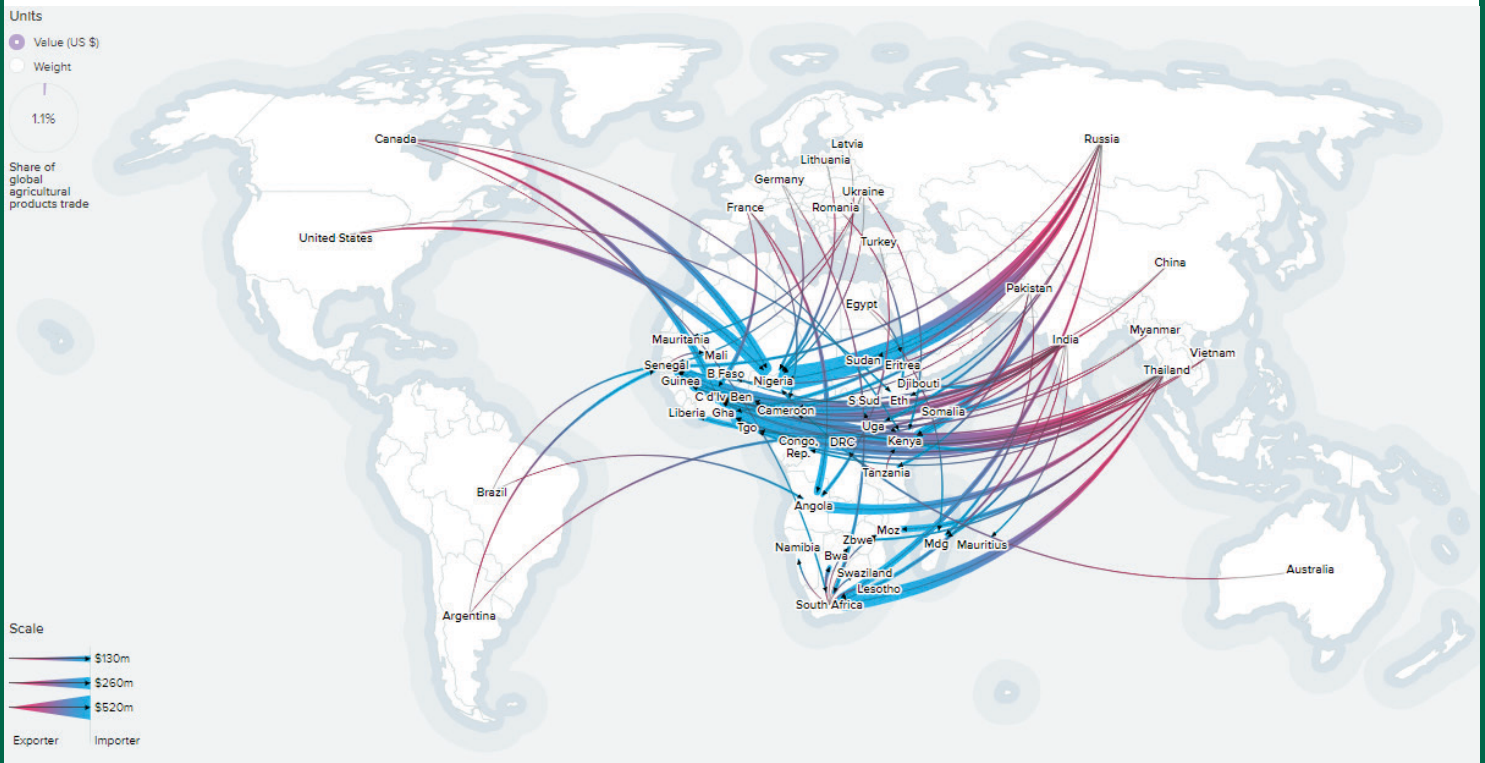


Figure 9: Sub-Saharan African cereal imports from the world in 2018

Source: <https://resourcetrade.earth/> Accessed 25 April 2020

The supply chain disruptions due to COVID-19 could lead to serious food security challenges especially for already vulnerable populations through constraining normal movement of food from surplus regions to areas of need. The resultant food price hikes can have devastating and long-term impacts on low-income countries. For example, poorest households (usually female-headed, with high dependency ratio, casual labourers and petty traders) experienced disproportionate impacts from the 2008 food price crises (WFP, 2020). These households spend a significant share of their incomes on food and usually have no savings and or access to credit. The 2008 food price crises increased the depth of poverty on affected households with severe food security impacts (Compton et al., 2010; Sanogo and Luma, 2010; Sanogo, 2009)^{10,11,12} The impacts were more severe for urban households that depend more on markets to get food and because of the direct link between food importers and urban traders that drove price increases (WFP, 2020). The WFP (2020) analysed the countries that face high risk of food insecurity due to COVID-19 related impacts based on the economic pillar of the Proteus food security index and export dependency for primary commodities (Figure 10).

⁸ Bailey, R., & Wellesley, L. (2017). Chokepoints and vulnerabilities in global food trade. London: Chatham House.

⁹ Wellesley, L., Preston, F., Lehne, J., & Bailey, R. (2017). Chokepoints in global food trade: Assessing the risk. *Research in Transportation Business & Management*, 25, 15-28.

¹⁰ Compton, J., Wiggins, S., & Keats, S. (2010). *Impact of the global food crisis on the poor: what is the evidence?* London: Overseas Development Institute.

¹¹ Sanogo, I. and Luma, J.K., 2010. Assessments of the impacts of global economic crises on household food security: innovative approaches, lessons and challenges. *Revolution: From Food Aid to Food Assistance—Activities and Platforms*, 259-273.

¹² Sanogo, I. (2009). The global food price crisis and household hunger: a review of recent food security assessments. *Humanitarian Exchange*, 42, 8-11.

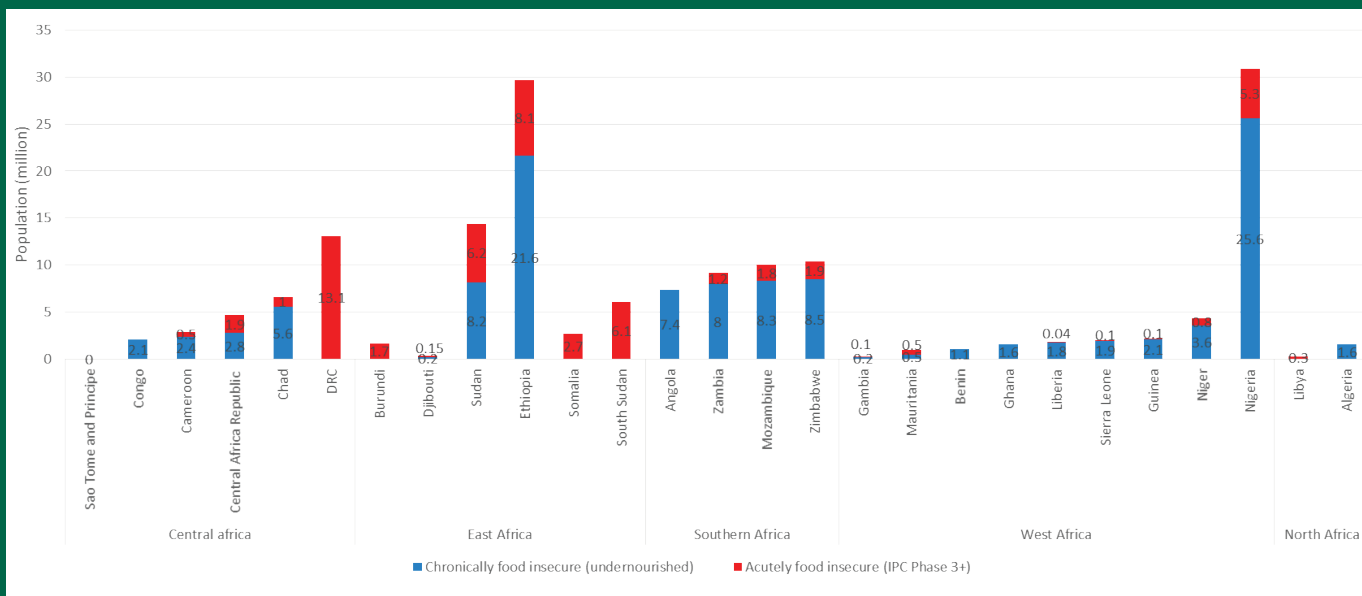


Figure 10: Summary of countries at risk of food insecurity due to economic impacts of COVID-19
 Source: Authors' construction based on data from WFP (2020)

Global main suppliers hit by COVID-19 pandemic affecting supplies of nutritious food in West Africa¹³

The WFP highlighted that the COVID-19 pandemic has affected some of the big suppliers across the globe in countries currently under strict confinement measures and operating at reduced production levels. For example, supplies of nutritious products mainly sourced from India and France where factories either significantly reduced production and or closed.

The WFP and UNICEF considering alternative local supplies to source the required enriched foods to complement the shortfall from global supplies to provide nutritious food to the vulnerable in need in Burkina Faso and Mali.

Disruptions in global agricultural supply chains and markets significantly affect many low income countries that heavily depend on agriculture for their export earnings. In addition countries whose export earnings depend on both agriculture and are concentrated in few agricultural commodities are at high risk of shocks in global agricultural markets (Schmidhuber et al., 2020). For example, a number of AGRA focus countries largely depend on agriculture based export earnings such as Malawi (more than 70%), Ethiopia (60%), Kenya (more than 50%) and Uganda (more than 40%). The significant contribution of agriculture to economic activity in many African countries means that they are also at risk of COVID-19 impacts on agricultural food value chains.

The projected global economic recession will negatively impact on progress made towards attaining poverty, hunger and food security SDGs among others and elevate the risk of hunger and food insecurity. National governments and international organizations have revised GDP projections for 2020 due to the negative economic outlook induced by the COVID-19 pandemic. The 2019 state of food security and nutrition in the world report argues that new evidence demonstrate that poverty and food insecurity are significantly affected and have been rising in economies that are experiencing economic downturns (FAO, 2019).

¹³ https://news.un.org/en/story/2020/04/1060942?utm_source=UN+News+-+Newsletter&utm_campaign=eac85a8ffe-EMAIL_CAMPAIGN_2020_04_02_06_35&utm_medium=email&utm_term=0_fdbf1af606-eac85a8ffe-107188301

The economic contractions induced by the pandemic are resulting in loss of livelihoods and income sources for many people impacting on their purchasing power. Reduced incomes at all levels affect provision of social safety nets for the vulnerable populations. For example, loss of income sources means that many will cut remittances with significant impacts on the recipient populations. In addition, in countries where social safety nets (such as food-based safety nets) are lacking and or inadequate the capacity to provide required support to the populations exposed to the impacts of the pandemic is limited. For low income countries where a significant share of the household income goes to food aggregate food demand may decrease due to income losses. The demand for cereals is less income elastic and may not be significantly affected by the income shocks induced by COVID-19. However, the demand for expensive and nutritious food such as meats, fruit, dairy products and vegetables will reduce as households opt for cheaper food options (especially staples) affecting food nutrition security.

Factor markets particularly capital and labour, and intermediate factors of production are also affected by the pandemic shock. Commercial and capital intensive agriculture is expected to be impacted by disruptions in the supplies of intermediate inputs in the short term and fixed capital in the long term (Schmidhuber et al., 2020). All countries in the continent have instituted social distancing measures and restrictions on movement that are affecting labour availability although agricultural activities have been classified as essential. The smallholder farming that is labour intensive and predominant in Sub-Saharan Africa is exposed to COVID-19 related impacts on labour supplies that affect different activities along food value chains. For example, in the regions where the cropping seasons are starting and planting is ongoing such as in East and West Africa, COVID-19 restrictions on movement and infections are affecting labour availability affecting highly labour-intensive agricultural activities. Labour shortages could result in reduced planted area and affect crop management activities such as weeding that will all contribute to reduced yields. This combined with other factors such as crop losses to extreme weather events (e.g. flooding) and pests and diseases (e.g. desert locust) could result in

reduced yields and tight regional food supplies. This would have serious implications for already food security vulnerable populations in the affected regions.

4.2 Implications of COVID-19 government measures on food trade, food security and resilience

The summary of COVID-19 cases and government measures in Africa is presented in Figure 8. The measures include total and partial lockdown, governance and socio-economic, public health and social distancing measures. The discussion below focuses on how some of these measures are facilitating and or prohibiting/ constraining food trade (domestic and regional), attainment of food and nutrition security and resilience of farming systems, food value chains and the population. Specifically, assessment of food trade measures looks at how measures including travel restrictions and border movement control measures have hampered or allowed food trade activities to continue during the pandemic.

Figure 12-14 summarises government measures instituted by selected countries in East, Southern and West Africa that either directly and or indirectly impact on food trade, food and nutrition security and resilience of farming systems and food value chains.

Movement restrictions: although the selected countries across the three regions have instituted total and or partial lockdowns, agricultural and food trade has been classified as an essential service and allowed to continue with operations. Movement of food products and related services has been permitted across all the regions. This is aimed at ensuring supplies of food to areas of need and to avert potential shortfalls and price spikes that could affect accessibility of food. For example to ensure smooth and uninterrupted movement of goods and services the East Africa Community (EAC) introduced Administrative Guidelines for application during the COVID-19 pandemic period¹⁴. However, there have been long delays due to transport restrictions and blockages at border posts and on major routes (due to health and security checks) which are affecting timely delivery of inputs and movement of food within and between countries.

¹⁴ <https://twitter.com/jumuiya/status/1254750651227222020?s=20>



29,798
COVID-19 cases

19,349
Active Cases

9,121
Recovered

1,328
Deaths

Country, territory or other	COVID-19 Cases				COVID-19 Government measures				
	# cases	Active Cases	Recovered	# deaths	Lockdown	Governance and socio-economic measures	Movement restrictions	Public health measures	Social distancing
South Africa	4,220	2,668	1,473	79	●	●	●	●	●
Egypt	4,092	2,723	1,075	294		●	●	●	●
Morocco	3,758	3,114	486	158		●	●	●	●
Algeria	3,127	1,304	1,408	415	●	●	●	●	●
Cameroon	1,430	719	668	43		●	●	●	●
Ghana	1,279	1,135	134	10	●	●	●	●	●
Nigeria	1,095	855	208	32	●	●	●	●	●
Ivory Coast	1,077	644	419	14	●	●	●	●	●
Djibouti	999	667	330	2	●	●	●	●	●
Guinea	954	757	191	6		●	●	●	●
Tunisia	922	690	194	38		●	●	●	●
Niger	681	368	289	24		●	●	●	●
Burkina Faso	616	165	410	41		●	●	●	●
Senegal	545	276	262	7		●	●	●	●
Réunion	412	112	300	0					
DRC	394	321	48	25	●	●	●	●	●
Mayotte	354	206	144	4					
Kenya	336	228	94	14		●	●	●	●
Mauritius	331	37	285	9	●		●	●	●
Somalia	328	304	8	16			●	●	●
Mali	325	217	87	21		●	●	●	●
Tanzania	284	226	48	10		●	●	●	●
Equatorial Guinea	214	206	7	1	●	●	●	●	●
Congo	186	164	16	6	●	●	●	●	●
Rwanda	176	89	87	0	●	●	●	●	●
Sudan	174	144	14	16	●	●	●	●	●
Gabon	172	143	26	3	●	●	●	●	●
Madagascar	122	61	61	0	●	●	●	●	●
Ethiopia	117	89	25	3		●	●	●	●
Liberia	117	84	25	8	●	●	●	●	●
Togo	90	25	59	6	●	●	●	●	●
Cabo Verde	88	86	1	1		●	●	●	●
Zambia	84	44	37	3		●	●	●	●
Sierra Leone	82	70	10	2	●	●	●	●	●
Uganda	75	29	46	0	●	●	●	●	●
Mozambique	65	53	12	0		●	●	●	●
Libya	61	41	18	2	●	●	●	●	●
Benin	54	26	27	1	●	●	●	●	●
Guinea-Bissau	52	49	3	0		●	●	●	●
Chad	40	32	8	0	●	●	●	●	●
Eritrea	39	28	11	0	●	●	●	●	●
Eswatini	36	25	10	1	●	●	●	●	●
Malawi	33	27	3	3	●	●	●	●	●
Zimbabwe	29	23	2	4	●	●	●	●	●
Angola	25	17	6	2	●	●	●	●	●
Botswana	22	21	0	1	●	●	●	●	●
CAR	16	6	10	0			●	●	●
Namibia	16	9	7	0	●	●	●	●	●
Burundi	11	6	4	1			●	●	●
Seychelles	11	5	6	0	●	●	●	●	●
Gambia	10	1	8	1		●	●	●	●
Mauritania	7	0	6	1		●	●	●	●
Western Sahara	6	1	5	0					
South Sudan	5	5	0	0			●	●	●
Sao Tome and Principe	4	4	0	0		●			
Lesotho	0	0	0	0	●	●	●	●	●

Figure 11:
Summary of
coronavirus
(COVID-19)
cases and
government
measures in
Africa

Source:
https://www.nutritioncluster.net/COVID_19_data_portal.
Accessed 25 April 2020

The Mozambican government launched a foreign trade website¹⁵ to help facilitate trade (include food trade) in the face of the COVID-19 travel restrictions and lockdowns. The web platform provides foreign trade operators comprehensive and timely access to basic information on import and export operations.

As highlighted above, restricted movements and COVID-19 infections also affect labour availability for different activities along food value chains. For example, significant reductions of labour during planting that have already started in East and West Africa can result in reduced planted areas and also affect other cropping activities during the season adversely affecting expected seasonal harvests. In areas that have started harvesting such as in Southern Africa and parts of West Africa the COVID-19 pandemic movement restrictions impede access to markets by farmers although most governments have indicated that agriculture activities are essential and are allowed to continue. In this case, critical labour shortages might affect timely harvesting, storage and marketing of crops. This could affect quality of harvests and increase PHLs affecting food availability and quality as well as potential farm incomes for farmers.

Lockdowns measures: The total and partial lockdown implemented by governments have affected economic activities across sectors. The hospitality industry for example has been severely affected with severe impacts on food trade such as poultry and fresh produce to restaurants and hotels. This has significantly affected smallholder farmers' access to markets and many are struggling with losses given the perishability of their produce. The lockdowns have also resulted in losses of income and livelihood sources for many households who were engaged in casual, informal and the hospitality industry that has been severely affected. Income losses have reduced purchasing power for basic food and this is affecting food and nutrition security. To address some of these challenges, some farmers and traders are using social media and farm-based sales to bridge production and market gaps during the pandemic.

Social protection measures: governments such as in Burkina Faso, Cote d'Ivoire, Kenya, Mali and Nigeria introduced social protection programmes that include cash transfers, food distribution and free basic services (water and electricity etc.) to vulnerable populations. These measures are helping address food and nutrition security particularly in vulnerable communities that has been worsened by the COVID-19 pandemic. In addition, governments have put in place

Mozambique launches foreign trade website¹⁶

The Government of Mozambique launched a foreign trade website to ensure access to all the information required for the process of importing, exporting and transit of goods. The launch of the External Trade Website follows the creation, in 2017, of the National Committee on Trade Facilitation, which is intended to coordinate, supervise and monitor the implementation in Mozambique of the Trade Facilitation Agreement.

The External Trade Website contains, among other information, procedures for the import, export and transit of goods, including the forms required, rates of customs duties levied on imports, procedures for appeal or review and agreements or parts of agreements on preferential access to markets of any country.

Kenyan farmers take new approach to sales during COVID-19 lockdown¹⁷

Farmers and produce traders in Kenya are employing social media and farm-based sales to bridge production and market gaps induced by the COVID-19 pandemic. Through use of the social media platforms the farmers and produce dealers are accessing customers and arranging for deliveries.

Given the lockdowns and curfew hours the operating hours have been affected, for example, road traders could not sale their produce in the late hours of the day when they used to get peak sales. The farmers and traders hope to reduce postharvest losses especially for fresh produce and use the income from sales to acquire key agricultural inputs such as fertiliser.

measures to ensure national food security during the pandemic through emergency financing of national strategic reserves for key staples. For example, the government of Nigeria released 70 000 tonnes of grain from the National Strategic Grain Reserve for distribution to the poor to help improve the food security of vulnerable households. The government

¹⁵ <https://suedafrika.ahk.de/en/news/news-details/mozambique-launches-foreign-trade-website>

¹⁶ https://clubofmozambique.com/news/mozambique-launches-foreign-trade-website-157873/?utm_source=The+Mozambican+Investor_&utm_campaign=a881354d34-EMAIL_CAMPAIGN_2017_05_25_COPY_01&utm_medium=email&utm_term=0_d3b369a42d-a881354d34-206630053

¹⁷ <https://allianceforscience.cornell.edu/blog/2020/04/kenyan-farmers-take-new-approach-to-sales-during-covid-19-lockdown/>

Nigeria releases 70 000 tonnes of grain from Strategic Grain Reserves¹⁹

President Buhari has approved the release of 70,000 Metric Tonnes of Grains from Nigeria's National Strategic Grain Reserves, for distribution to poor and vulnerable persons in frontline COVID-19 States, as well as persons whose livelihoods will be affected by the lockdowns.

of Kenya has authorised the importation of 4 million 90kg bags of maize (for food and feed) to avert a food crisis due to the COVID-19 pandemic¹⁸.

Economic measures: governments across the regions have implemented fiscal and monetary measures to support economic activities that have been affected by the downturn induced by the COVID-19 pandemic. The measures include business support schemes such as reduced interest rates, tax cuts, credit schemes for private sector (such as in Kenya, Ghana and Nigeria) aimed at facilitating access to affordable finance for businesses including specific target for small and medium enterprises (and agribusinesses) to recover, grow and or sustain their businesses in the face of the pandemic. A number of governments have also put in place input support programmes (e.g. Ghana, Malawi, Nigeria and Uganda) to ensure access to key agricultural inputs by farmers. This is important to support agricultural production of key crops and also contribute to build resilience of farmers as they access improved and climate smart inputs through the support programmes.

Governments have also implemented price control measures to avert food price spikes especially of key staples (e.g. Ethiopia, Rwanda, Malawi and Niger). In addition, some governments have instituted measures aimed at increasing personal disposable income for individuals such as income tax cuts (e.g. in Kenya). This will help improve the purchasing power of individuals and support households' access to food and other basic needs.

Social distancing: the social distancing measures have resulted in the closure of public gatherings and institutions such as schools, community halls etc. that has disrupted feeding programmes for children and the vulnerable in affected areas. The social protection

measures that have been implemented by governments are helping address some of the challenges created by the social distancing measures. However the challenge is not all the affected will be reached with the ongoing interventions and millions are expected to experience severe food and nutrition conditions due to the impacts of the COVID-19 pandemic.

Public health measures and risk of reduced funding to agriculture: Governments in all countries are implementing measures to address immediate health impacts due to the COVID-19 pandemic that include increased funding to the health sector. This has resulted in resources from other sectors being re-allocated to the health sector. The challenge for the agriculture sector is that it is already underfunded in many countries and resources for the sector may be reallocated to address immediate health impacts of the COVID-19 pandemic. Reducing funding to the agriculture sector would affect progress gained towards attaining the 2014 Malabo Declaration agriculture transformation goals. For example, investments to attain food and nutrition security as well as build and strengthen resilience of farming systems to climate and other shocks will be compromised with reduced funding in the sector. This means governments should ensure comprehensive interventions across sectors that ensures progress in other sectors is not affected.

At the regional level, RECS have also put together guidelines and measures to facilitate cross border trade particularly of essentials such as food during the COVID-19 pandemic (Figure 15). Despite these efforts, there have been reports of administrative delays to cross national borders, for example at the border between Uganda and Kenya²⁰. There has been reports on unresolved cases of Non-Tariff Barriers against Zambia (NTB 000-951 and NTB 000-953) against mandatory quarantine of all incoming drivers and vehicles including truck drivers of essential and perishable cargo and fees charged for police escorts²¹. Similarly NTB 000-949 registered against Mozambique on suspension of issuance of visas to commercial truck drivers was reported to be affecting member states who use the port of Beira.²¹ The increased transportation costs due to COVID-19 related logistical delays at national borders are likely to be transmitted into the final costs of basic goods and services such as food and medicine. This will further affect most of the poor who are already experiencing impacts of reduced incomes among others.

¹⁸ <https://www.nation.co.ke/news/Munya-we-will-import-4-million-bags-of-white--yellow-maize/1056-5510388-4qegioz/index.html>

¹⁹ <https://www.independent.ng/covid-19-buhari-approves-release-of-70000-tonnes-of-grain/>

²⁰ <https://www.nation.co.ke/news/Kenyan-truckers-protest-Uganda-border-rules/1056-5536366-sb470jz/index.html>

²¹ SADC. 2020. 4th report on the COVID-19 pandemic in the SADC region for the week of 20-25 April 2020. Botswana: Southern Africa Development Community

Figure 12: COVID-19 containment measures by selected countries in East Africa that affect food trade and food security

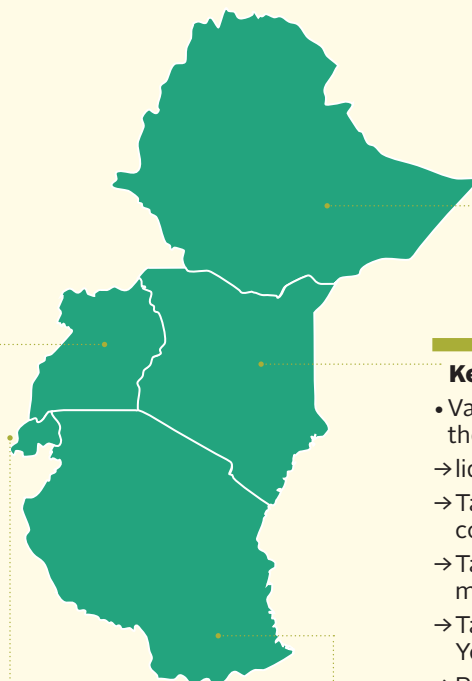
Uganda

- Uganda closed all its borders for exit and entry to anyone, including Ugandan citizens and residents
- All flights in and out of Uganda are suspended - only the cargo planes or those entering on account of emergency or relief work will be permitted entry
- Government suspended all public transport
- Trading in non-food items at markets is suspended to scale down number of people in markets and selling of cooked food on the streets is prohibited
- Shopping malls, arcades, hardware shops (selling non-food items) are closed for 14 days as well as any shops selling non-essential items
- Only food stores, stores selling agricultural products, veterinary products, detergents and pharmaceuticals should remain open
- Food market sellers may not return home during the 14-day lockdown, they must find accommodation close to their food stall (if they wish to continue to operate it)
- Factory owners arrange for the crucial employees to camp around the factory area for the 14 days - if they cannot do that they should suspend production

Rwanda

- Awareness campaigns using radio, TV, meetings, social media channels, SMS, and operated numbers
- All arriving and departing commercial passenger flights, including RwandAir, will be halted beginning at midnight on 20 March 2020 for an initial period of 30 days -only cargo and emergency flights will operate
- All employees shall work from home except those providing essential services
- Non-essential shops and markets closed, all bars are closed, and motos/restaurants/cafes may only provide take-away/delivery services
- Travel between cities and districts is suspended, and unnecessary movements outside of home are not permitted
- Borders are closed, except for goods, cargo, and returning Rwanda citizens and legal residents

- Construction sites should continue if they can be able to encamp their workers for 14 days otherwise, they should suspend construction
- Cargo transport by train, plane, lorry, pick-up, tuku-tukus, bodaboda and bicycle, within Uganda and between Uganda and the outside,



Tanzania

- All international scheduled and chartered passenger planes to Tanzania have been suspended
- Cargo planes are permitted but crew members will be quarantined for the whole duration of their stay, at own costs
- Visa extension for foreign nationals who can't leave the country because of the coronavirus pandemic

Ethiopia

- Bank of Ethiopia increased the amount of money that can be transferred through mobile banking
- Tax exemptions for import of goods necessary for COVID 19 response
- Ministry of trade to expedite VAT returns to help companies with cash-flows
- Employers are prohibited from laying off workers on the grounds that business has slowed down
- Landlords cannot evict tenants and neither can they increase rent
- Ethiopia has closed all land borders
- All movements at land borders, except for the flow of cargo and essential goods banned

Kenya

- Various measures to save jobs and by extension the country's economy:
 - liquidity ratios and interest rates reduced
 - Tax cuts to individuals, small businesses, and corporations
 - Tax relief of 100% for people earning gross monthly income of up to KES 24,000
 - Tax reduction of Top Income Tax Rate (Pay-As-You-Earn) from 30% to 25%
 - Reduction of the VAT from 16% to 14%, effective 1st April, 2020
 - Reduction of the turnover tax rate from the current 3% to 1% for all Micro, Small and Medium Enterprises (MSMEs)
- All international flights to Kenya suspended - only cargo flights will be allowed to operate but crew must follow strict regulations
- The land border between Kenya and Uganda has been closed to all pedestrians and vehicles except for cargo trucks
- Cessation of movement by road, rail or air, in and out of COVID-19 high risk cities (Nairobi Metropolitan Area and the counties of Kilifi, Kwale and Mombasa.)
- The movement of food supplies and other cargo to continue as normal during the declared containment period through road, railway and air
- Traders and farmers in fresh produce to continue with their agricultural activities, so as to ensure continued supply of the farm produce to our markets
- KSh. 2 Billion to support the most vulnerable members of our society, especially the needy in urban areas
- KSh. 10 Billion to the elderly, orphans and other vulnerable members of our society through cash-transfers

Source: <https://www.acaps.org/covid19-government-measures-dataset>
 Accessed 29 April 2020 and government sources



Figure 13: COVID-19 containment measures by selected countries in Southern Africa that affect food trade and food security

Zambia

- All Provincial and District Epidemic Preparedness and Response Committees activated
- All non-essential travel to other countries is prohibited
- Non-essential travel outside the district boundaries is cancelled
- Discretionary travel to places such as shopping malls or social visits should be minimized

- Conferences, meetings and workshops involving large groups of people should not be held until further notice
- Institutions should take measures to ensure that there is no crowding at the service points or work stations

Zimbabwe

- Zimbabwe's central bank has reintroduced the use of foreign currency for the purchase of local goods and services exactly eight months after it instituted the exclusive use of the Zimbabwe dollar for local transactions
- All non-essential travel and traffic is banned both inbound and outbound except for movement of cargo
- All borders closed to human traffic, excluding returning residents
- The Reserve bank has reduced the prime lending rate from 35% to 25%
- Lockdown due to end on the 20th April will be extended by two weeks
- Declaration of State of Disaster, 17 March

Malawi

- Fuel prices reduced with immediate effect
- Malawi Revenue Authority to open up a voluntary tax compliance window for a period of six months to allow tax payers with arrears to settle their tax obligations in instalments without penalty
- Special fund provided to ADMARC to buy agricultural produce at competitive prices
- Increase the MEDF loans allocation from K13 billion to K15 billion in order to help Micro, Small and Medium Scale businesses that have been seriously affected by the pandemic
- Increase Nutrition Allowance payable to civil servants with foundational medical conditions by 50 percent
- Reduce fees and charges on all electronic money transactions in order

South Africa

- Of the 53 land ports (also known as border stations) throughout South Africa, 35 shut down
- Total lockdown from the midnight 26th March extended to 30th April - individuals will not be allowed to leave their homes except for strict reasons
- All non-essential businesses will be closed
- Regulations put in place to prohibit unjust price rises
- Any employee who falls ill through exposure at their workplace will be paid through the Compensation Fund
- Declaration of State of National Disaster, 15 March

Mozambique

- The Maputo executive has asked its external partners for US\$700 million to help address the negative impacts of the pandemic
- Food producers in the province of Maputo have guaranteed that more than 500,000 tons of staple foods, especially vegetables, will come to market over the next three months
- National Inspection of Economic Activities (INAE) would be strengthening monitoring for possible price increases
- Central bank orders cuts to e-transfer fees for three months
- Central Bank cuts benchmark interest rate by 1.5 percentage points
- Industries producing essential products: government authorises increased workforce
- Mozambique launches foreign trade website
- Border closures - cases of 'state interest, the transport of goods by duly accredited operators and health-related situations' exempted
- Government redirecting the industrial sector towards the production of consumables necessary for the prevention of a pandemic and ensuring the adoption of preventative actions in all institutions, public or private

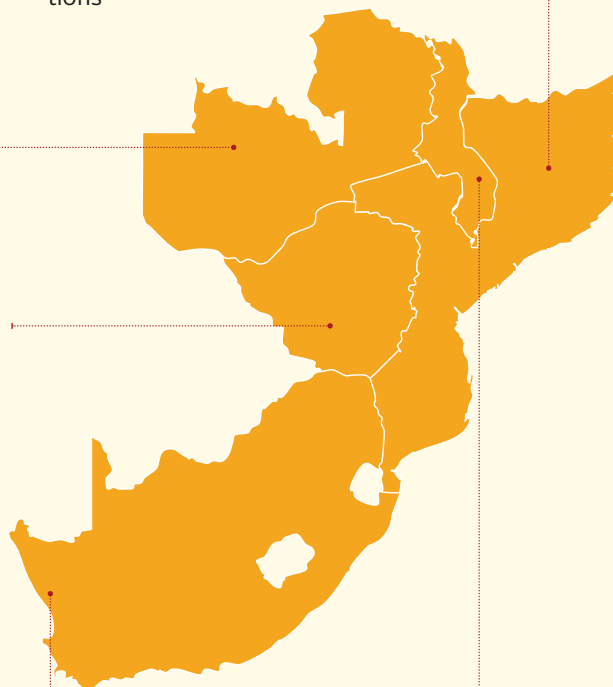


Figure 14: COVID-19 containment measures by selected countries in West Africa that affect food trade and food security

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

- No international flights to and from Côte d'Ivoire until further notice
- Land, air and sea borders closed
- Travels between Abidjan and the other main cities is forbidden excepted for people transporting food supplies, medical and pharmaceutical products, medical evacuations, gas and fuel deliveries, as well as water, electricity, telephony and emergency services
- All restaurants are closed
- Fund of 28 billion CFA francs will be allocated to buying medicine and protective gears (masks, thermometers, gloves, etc.)
- The government will pay water and electricity bills of 1 million low-income households in April and May.
- The government recommend home-office in the public administration and private sector
- Obligatory quarantine for vulnerable population (elderly and people with chronic illnesses)
- 400 million CFA francs to support sport athletes
- Extension: state of emergency extended until 30th of April
- Economic support of 75.000 CFA franc per semester to 177 198 low income households

Mali

- Financial support of 6 300 000 000 CFA Francs to the economy
- Reduction for 3 months of the taxable base for necessities; coverage of electricity and water bills for the months of April and May 2020 for low income households
- Exemption from Value Added Tax on electricity and water bills for all consumers for the months of April, May and June 2020
- Free distribution of fifty-six thousand tons

of cereals and sixteen thousand tons of animal feed to vulnerable populations affected by COVID 19

- 20 billion CFA Francs allocated to the support of small and medium-sized enterprise, tax-cuts for companies negatively impacted by COVID-19
- All land borders are closed to passenger vehicle traffic while allowing cargo and freight

Ghana

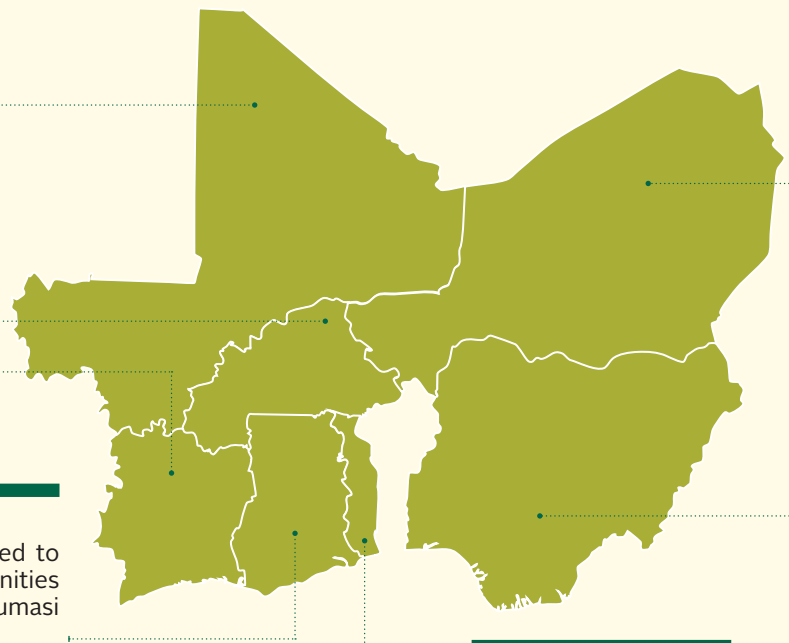
- Food will be delivered to vulnerable communities in Accra, Tema, Kumasi and Kusoa
- Government of Ghana released numbers that can be called by needy households or communities for free food
- Different economic measures including: 2% reduction of interest rates by banks, and the granting by banks of a 6 months moratorium of principle repayments to entities in the airline and hospitality industries
- The government will absorb all water bills for all Ghanaians for the next 3 months, April, May, June
- A soft loan scheme will be rolled out for micro, small and medium businesses which will have a 1 year moratorium and a 2 year repayment period
- The government will cover the cost of electricity bills for the poorest, i.e.

lifeline consumers who consume 0 - 50 kilowatt hours per month, for this period

- For all consumers commercial and residential government will pay 50% of electricity bills for this period, using March amount consumed as benchmark
- All borders by land, sea and air will be closed to human traffic for the next 2 weeks – except for goods, supplies and cargo
- The closure of Ghana's borders is extended for a further 2 weeks from the 20th of April
- Movement of people has been restricted except to get essential items and use public bathrooms, and there shall be no inter-city movement of commercial and private vehicles/aircrafts except to deliver essential goods

Togo

- Emergency fund of 2 billion CFA francs
- National sanitary state of emergency declared for 3 months
- Financial support for low income households
- Free electricity and water for low-income households for 3 months
- Financial support for farmers, with the aim to ensure independence in food production
- Creation of a fund to support the economy: 400 billion CFA Francs
- The cities of Lomé, Tsévié, Kpalimé and Sododé are under lockdown



Source: <https://www.acaps.org/covid19-government-measures-dataset>
Accessed 29 April 2020 and government sources



Niger

- Government introduced price ceilings on key staple food (maize, rice, millet and bread) on 3 April for three months with possible extension
- Allocation of 1M CFA francs to deal with the crisis
- Electricity and water bills will be played by the state for the most vulnerable part of the population
- VAT suspended for all COVID-19 related importation
- International flights from Niamey and Zinder are cancelled for 2 week (renewable) –except for trade, humanitarian flights, military flights and national flights
- Land borders are closed for 2 weeks (renewable) – except for trade
- Niger’s Civil Aviation Authority announced a two-week extension (until April 17) of the international airports’ closure to commercial traffic

Nigeria

- President of Nigeria has approved the release of 70 000 tonnes of grains from Nigeria’s National Strategic Grain Reserves, for distribution to poor and vulnerable persons in frontline COVID-19 States, as well as persons whose livelihoods will be affected by the lockdowns
- In response to the health emergency, the Government has started distributing food aid in Lagos, the most affected city in Nigeria - estimated that 200 000 households, equivalent to 1.2 million people, will be targeted
- All people are told to remain at home and all but essential businesses are closed for a period of 14 days
- Lockdown due to end on the 13th of April extended for a further 14 days
- A seven-day lockdown in Nigeria’s northern economic powerhouse, Kano state

Figure 15: Regional measures to facilitation Cross Border Trade during the COVID-19 pandemic

ECOWAS stabilisation and economic recovery

Objectives:

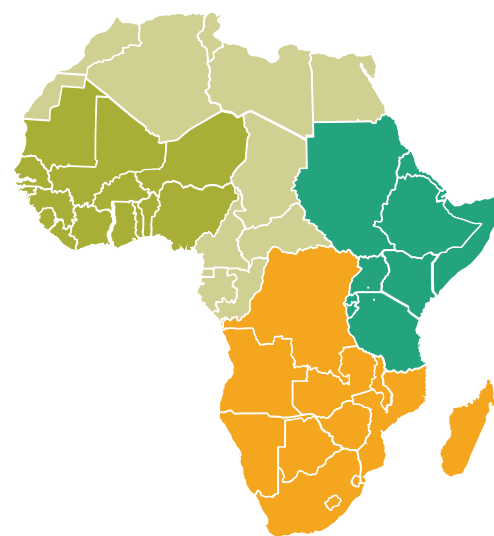
- Develop jointly, a response plan taking into account the fight against the COVID-19 pandemic
- Issue long term treasury bills and bonds to finance critical investment needs, to support the private sector and revive economies
- Provide substantial support to the social sectors (distance learning tools, for the most disadvantaged segments of society (social safety nets)
- Deploy through the Central Banks, tools, means and significant liquidity to support;
 - the financial sector, in particular banks and financial institutions, small scale enterprises (SMEs)
 - microfinance institutions in providing support to the informal
- Mobilise additional resources from the international community to address social challenges confronting Member States
- Support the African Union’s initiative to negotiate with partners for cancellation of Public debt and restructuring of private debt of African countries
- Implement urgent measures to support the local production of consumer goods, including agricultural products, thereby reducing the import bill for these goods
- Set up a support programme for the pharmaceutical and health protection equipment manufacturing sector, whose output covers barely 20% of the region’s current consumption needs
- Avoid the imposition of import restrictions on other ECOWAS countries, particularly with regard to essential goods (drugs, food, etc.)
- Convene a meeting of the Convergence Council ncil to consider the impact of the COVID-19 pandemic and its implications on macroeconomic convergence performance in 2020 and beyond

See for details: https://www.ecowas.int/wp-content/uploads/2020/04/uk2020-04-23-Communiqué_Extraordinary_Summit_Coronavirus_V2-1.pdf

EAC Administrative Guidelines to Facilitate Movement of Goods and Services during the COVID-19 pandemic

Objectives

- To complement national measures against the COVID-19 pandemic
- To ensure smooth and uninterrupted



movement of goods and services during the COVID-19 pandemic

- To encourage local production of essential products during this COVID-19 pandemic
- To enhance region awareness on measures instituted against the COVID-19 pandemic
- To mitigate the negative impact of COVID-19 on movement of goods and services

See for details: <https://eac.int/coronavirus>

SADC Guidelines on Harmonisation and Facilitation of Cross Border Transport Operations across the Region during the COVID-19 pandemic

Objectives:

- Limit the spread of COVID-19 through transport across borders
- Facilitate the implementation of transport related national COVID-19 measures in cross border transportation
- Facilitate interstate flow of essential goods such as fuel, food, medicines and agricultural inputs
- Limit unnecessary and mass movement of passengers across borders
- Balance, align, harmonise and coordinate COVID-19 response measures with the requirements for trade and transport facilitation and transport facilitation

See for details: https://www.sadc.int/files/8315/8626/0246/Final_SADC_Guidelines_on_Cross-Border_Transport_during_COVID19-Adopted_on_6_April_2020-ENGLISH.pdf

5. AGRICULTURAL COMMODITIES AND FOOD PRICE MONITORING

The disruptions of food value chains due to COVID-19 pandemic measures are expected to result in sudden changes in prices and increased volatility in food prices. Figure 16 presents average variation (%) of 14 main food products monitored and compiled by FAO since 14 February 2020²². In Southern Africa, AGRA focus countries particularly Zambia recorded average price variations of 28% while Malawi and Mozambique recorded average price variations of 15% and 10% respectively. In East Africa, the average price variations for the AGRA focus countries were: Ethiopia (5%), Kenya (4%), Rwanda (20%), South Sudan (-0.1%), Tanzania (7%) and Uganda (10%). In West Africa Burkian Faso (0.1%), Cote d'Ivoire (13%), Ghana (17%), Mali (-0.9%), Nigeria (5%) and Togo (-4%). On average the Southern Africa region experienced the largest average price variations between 14 February and 23 April 2020. However, more analysis is required to understand the underlying factors contributing to the price variation which might be beyond the COVID-19 pandemic and related measures.

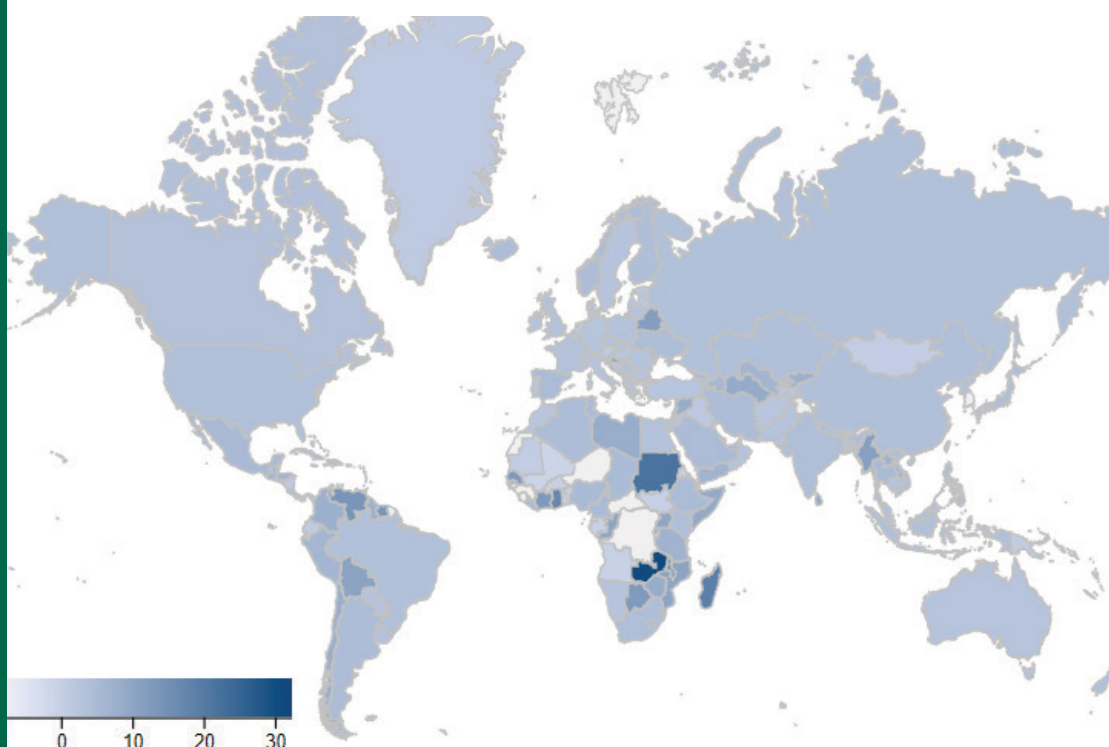


Figure 16: Average variation (%) of prices (between: 14/02/2020-23/04/2020)

Source: <https://datalab.review.fao.org/dailyprices.html#>

Accessed 23 April 2020

5.1 East Africa

The prices of main food staples were mixed in March and generally remained higher than the previous year in several markets. Despite improved availability of food supplies in the region, panic buying due to the COVID-19 pandemic and restrictions on movement affecting food trade activities. Below average 2019 cereal outputs and difficult macroeconomic conditions contributed to high prices above the levels of the previous year.

Ethiopia: The prices of staple crops have been increasing in the country despite average national production and the trend is expected to continue however, prices of maize in Addis Ababa and Dire Dawa decreased in March. The factors that contributed to overall price increases for food staples included restricted movements due to COVID-19 and insecurity (FAO, 2020). Prices were way higher than the previous year due to increased production and transport costs due to national currency depreciation. Prices projected to increase in the next 3 months.

Kenya: prices of maize and sorghum decreased in several markets in March as supplies from short season rains season harvests and imports. However, prices remained above the previous year levels in several markets due to below average 2019 yields. Prices of beans increased in March and remained well above last year levels.

Rwanda: prices of maize and sorghum decreased in March as market availabilities increased from 2020 season harvests. Some price increases in urban areas reported due to panic buying due to COVID-19. Prices of beans

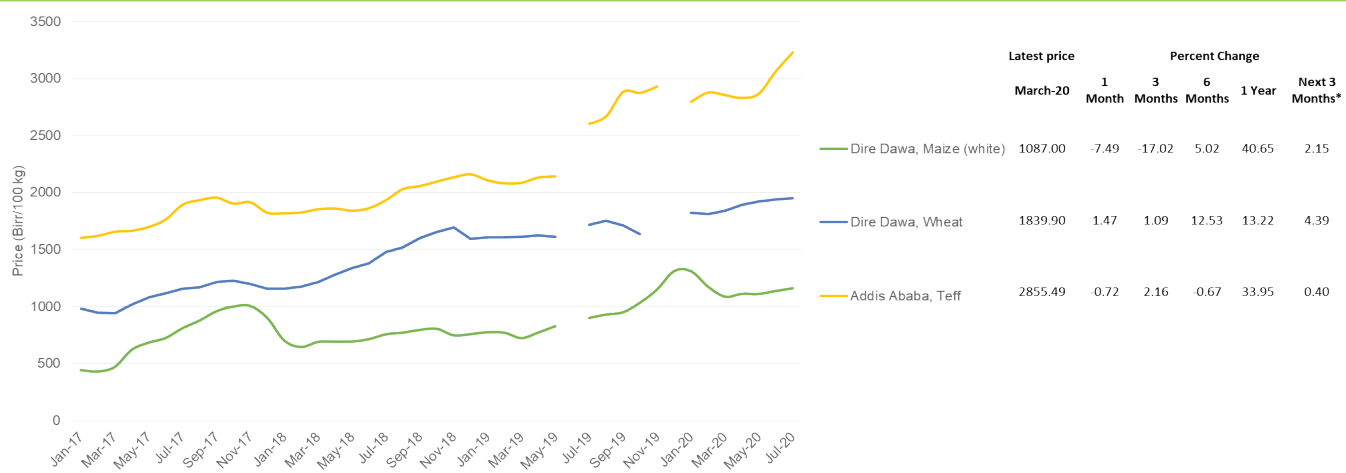
²² <https://datalab.review.fao.org/dailyprices.html#>

increased in March. Projections for the next 3 months indicate overall increase in staple food prices in several markets with small declines in some markets.

Uganda: maize prices increased in March following declines in previous 2 months. Panic buying and sharp increase in demand due to the COVID-19 pandemic resulted in upward pressure on prices. March prices for maize were higher compared to the previous year due to below average 2019 yields and sustained exports in past months.

Tanzania: maize and beans prices declined in March as market supplies increased due to harvests of the 'Vuli' crops. However, prices remained higher than previous year due to sustained demand from East and Southern Africa and below average 2019 cereal production. Prices expected projected to decrease in the next 3 months.

Wholesale prices of food crops in selected markets in Ethiopia



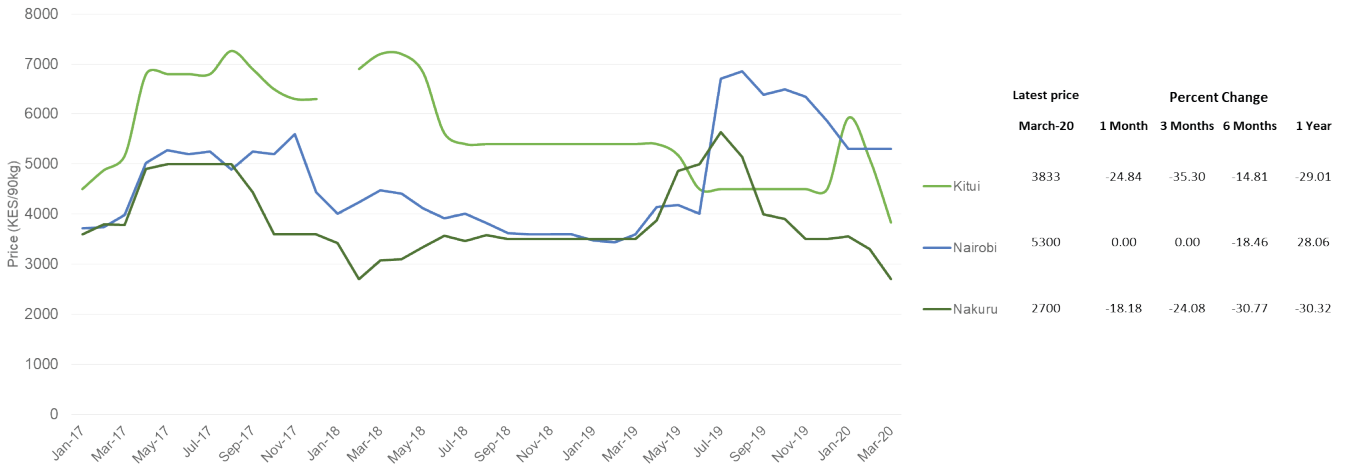
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Wholesale prices of maize (white) in selected markets in Kenya



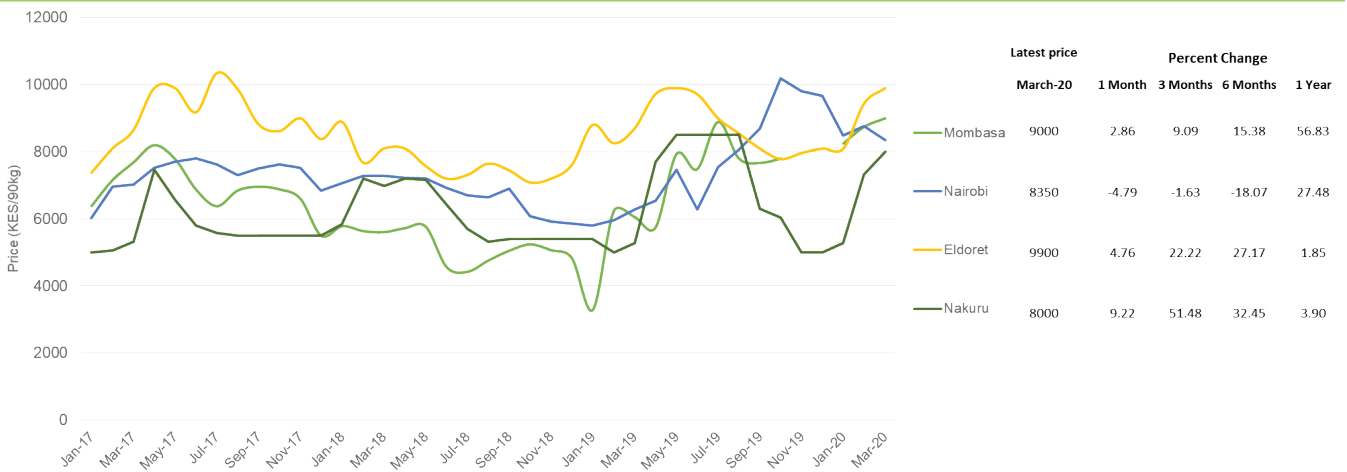
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

Wholesale prices of sorghum in selected markets in Kenya



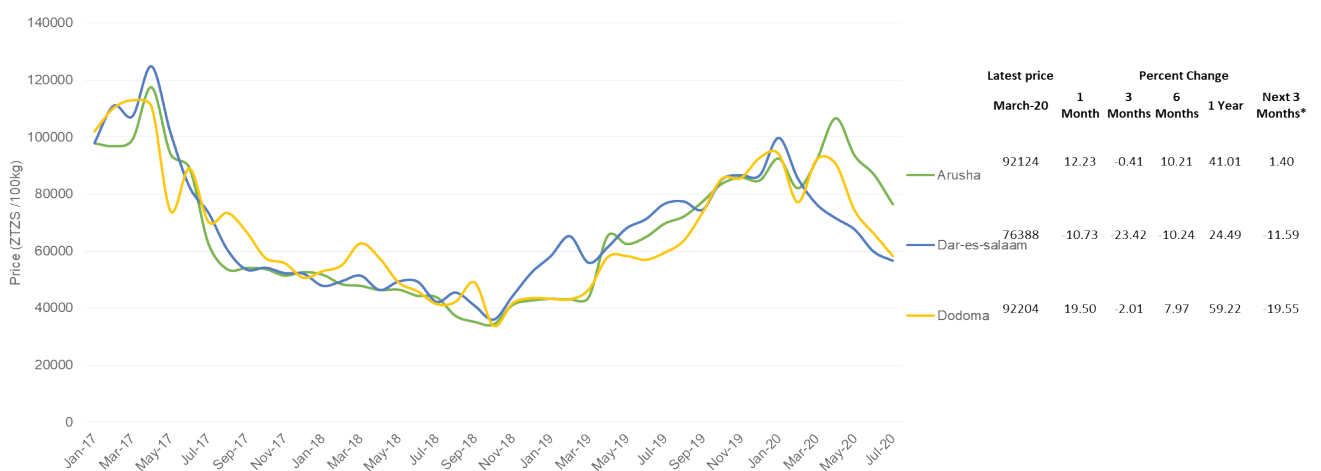
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

Wholesale prices of beans (dry) in selected markets in Kenya



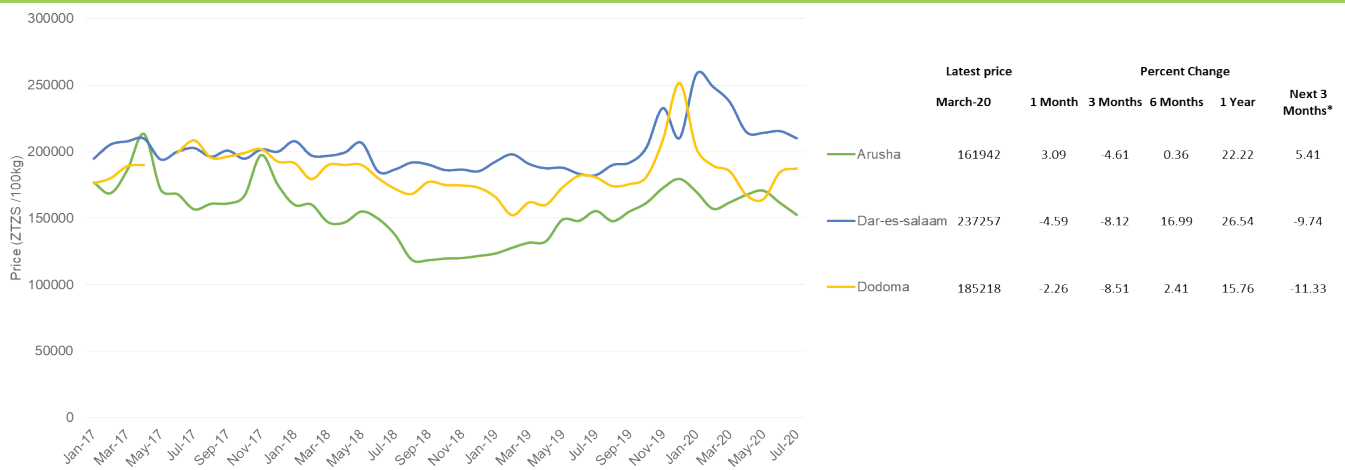
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

Wholesale prices of maize in selected markets in Tanzania



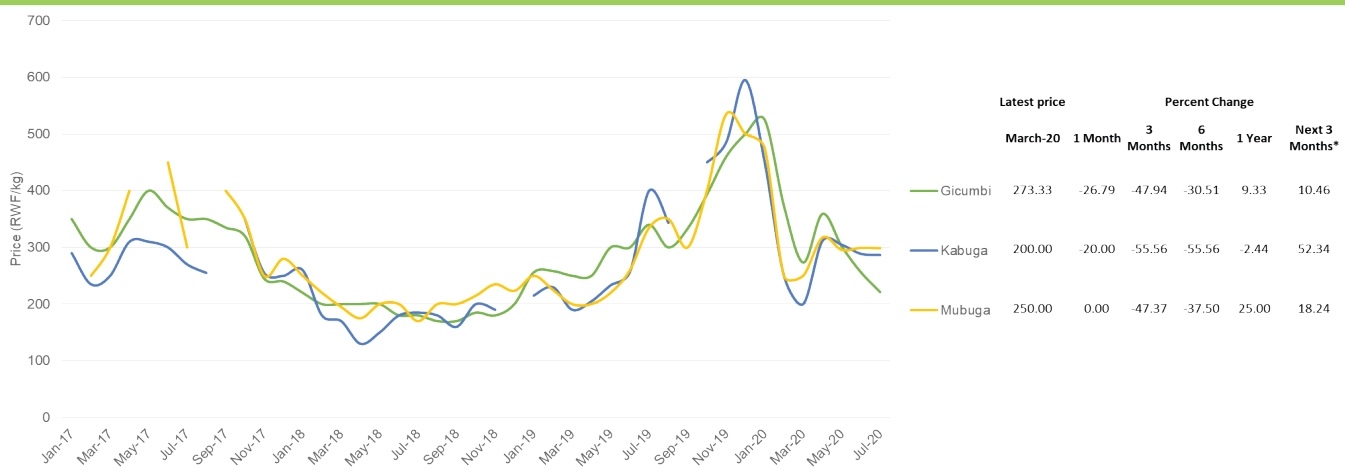
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Wholesale prices of beans in selected markets in Tanzania



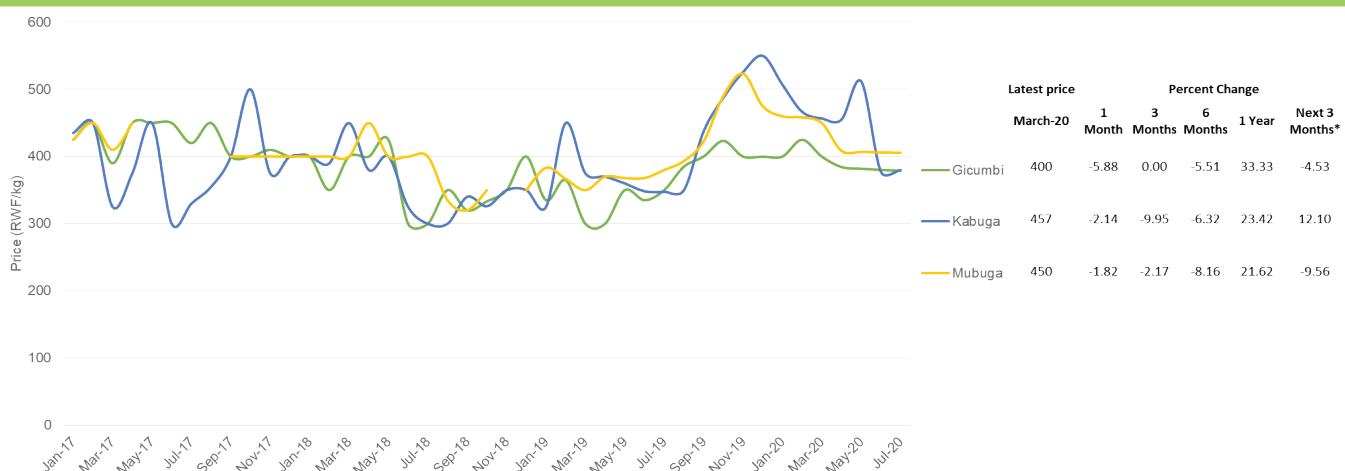
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of maize in selected markets in Rwanda



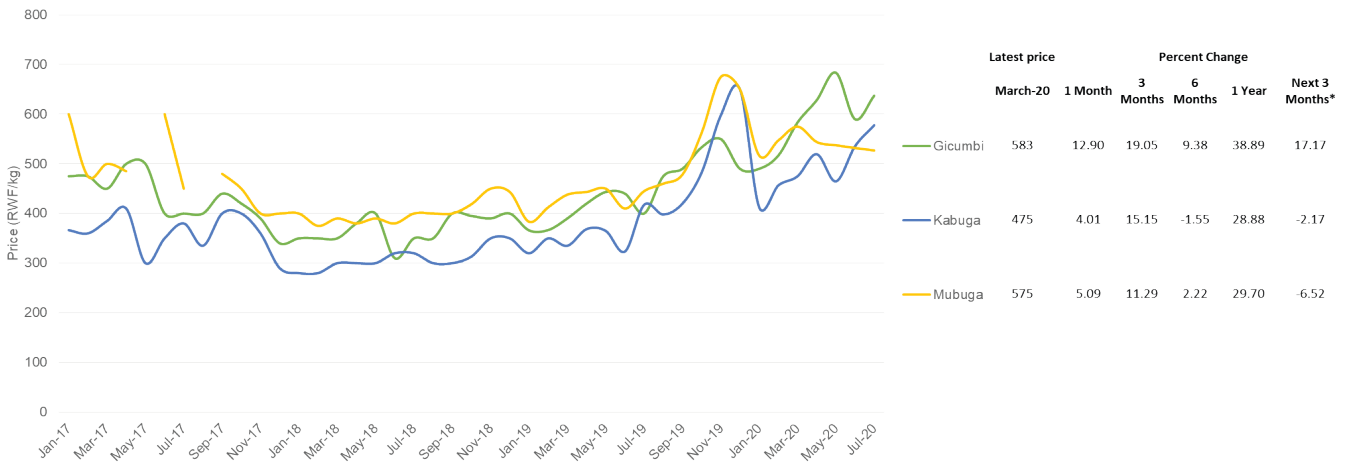
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of sorghum in selected markets in Rwanda



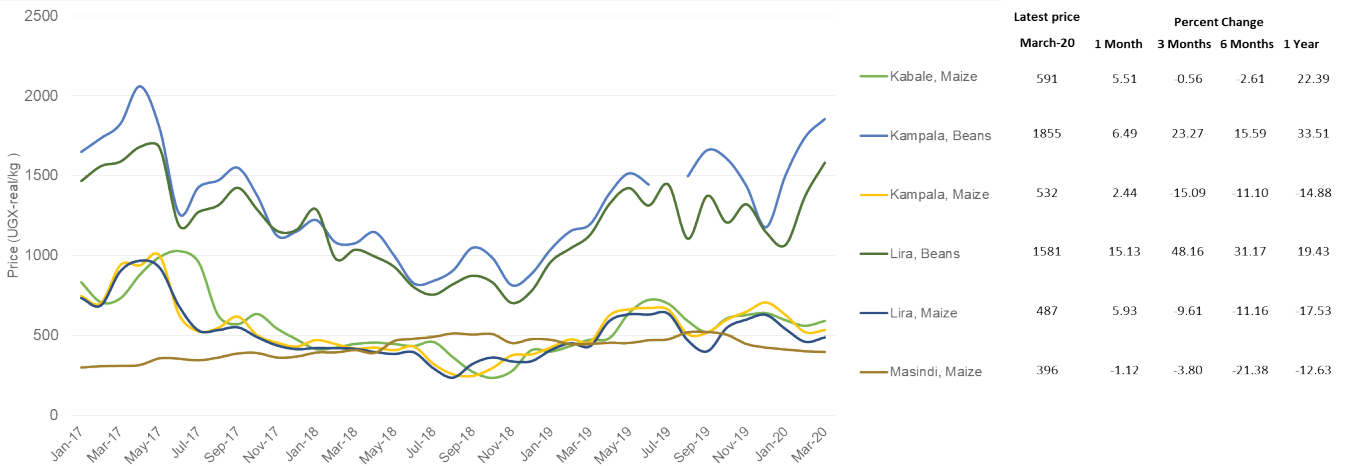
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of beans (dry) in selected markets in Rwanda



Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Wholesale prices of food crops in selected markets in Uganda



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

5.2 Southern Africa

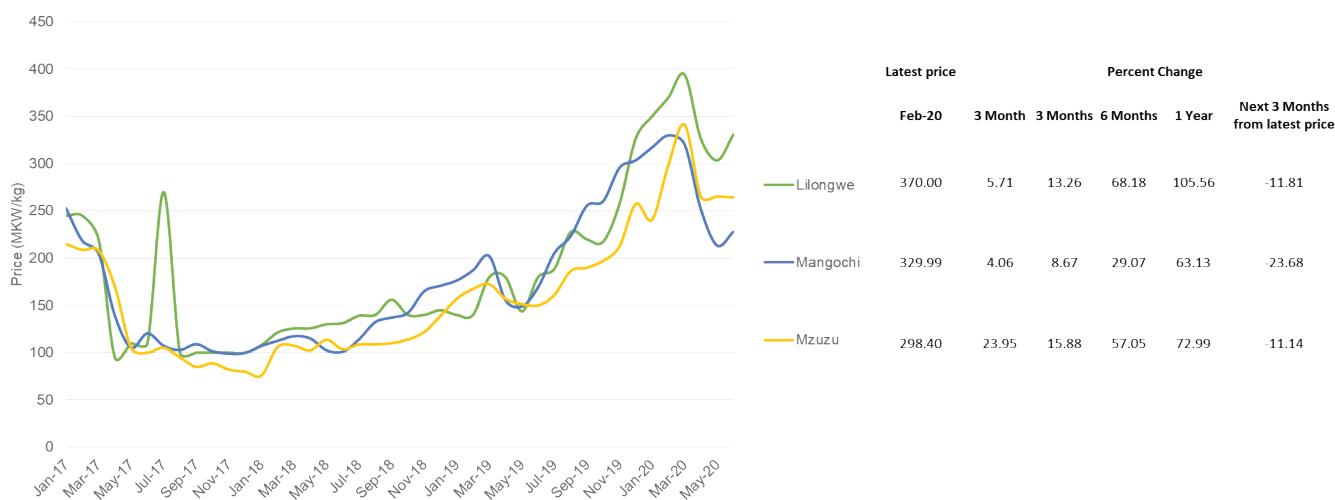
The recurring climate shocks in Southern Africa have significantly contributed to reduced food production and availability pushing prices up. Although prices are expected to fall in parts of the region that have experienced good harvests, most areas recorded below average seasonal harvest and food prices are expected to start picking from June/July. Despite food price decreases due to current harvests, the levels of prices will be higher than 2019 levels. The impact of the COVID-19 pandemic expected to result in localised supply shortages and price hikes due to related containment measures.

Malawi: prices of maize increased in February but expected to decrease due to new harvest from the 2019/2020 cropping season decreases. Decreases are expected in staple food prices (especially maize) in the next 3 months. The 2020 production is expected to be above average and improved domestic supplies will sustain price decreases in future. Potential impacts of the COVID-19 pandemic might reverse some price decreases triggered by increased domestic supplies.

Mozambique: improved food availabilities due to early harvesting of the 2020 crops contributed to continued food price declines in the country in March. However, expected below average yields especially in the southern parts that were affected by severe dry conditions at the beginning of the cropping season are likely to result in food price increases. Price expected to further decrease in the next 3 months.

Zambia: the prices of maize increased in several markets in March. The price controls introduced last year continue to contain pressure for price increases due to tight domestic supplies (FAO, 2020). The expected good harvests from current cropping season expected to push maize prices down. The COVID-19 impacts on markets and supply chains could result in upward pressure in prices.

Retail prices of maize in selected markets in Malawi

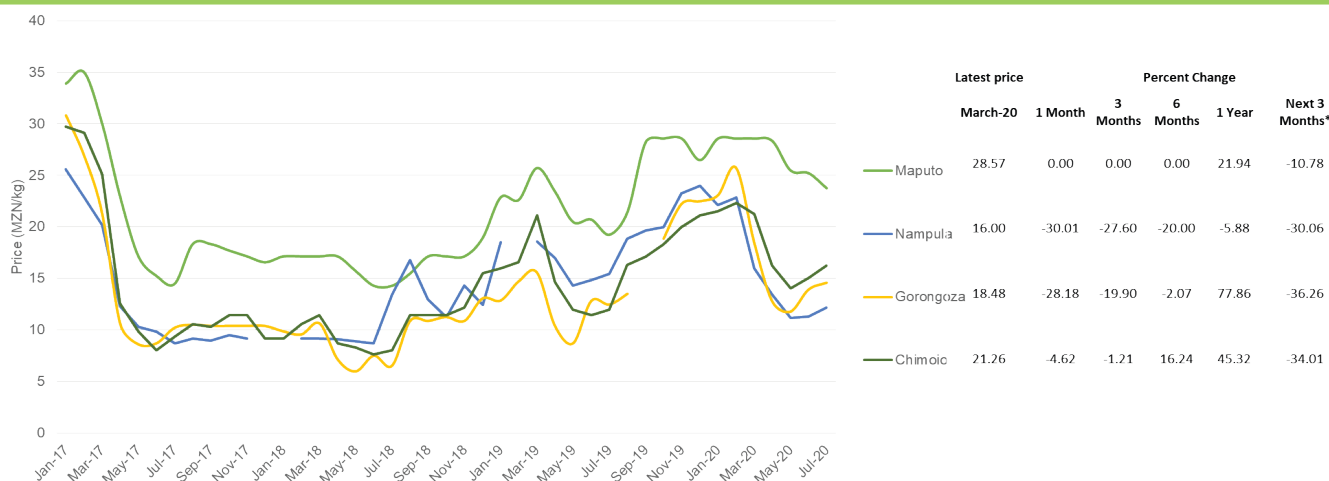


Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of maize in selected markets in Zambia



Retail prices of maize (white) in selected markets in Mozambique



Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

5.3 West Africa

Prices of staple foods remain below average except in deficit and conflict affected areas. The price of cereals is expected to be below or near average for rest of the year although it would be above last year's levels in many markets across the region. 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.

Burkina Faso: wholesale prices of maize, sorghum and millet remained consistently stable and were below levels of the previous year. Improved domestic market supplies from 2019 harvests contributed to stable and low market prices. However, projections for next 3 months indicate slight prices increase in these crops. Prices of imported rice remained stable and is projected to decrease in next 3 months.

Cote d'Ivoire: maize, cassava and imported rice prices decreased while plantain prices increased in March. The prices of maize and cassava are projected to decrease in the next 3 months while imported rice and plantains prices increase.

Ghana: prices of maize increased in several markets with slight decreases in some markets. Prices remained higher than previous year in some markets such as in Kumasi. Maize prices projected to increase in the next 3 months. Cassava prices increased in March and were way higher than previous year. Projections for next 3 months indicate decreases in cassava prices.

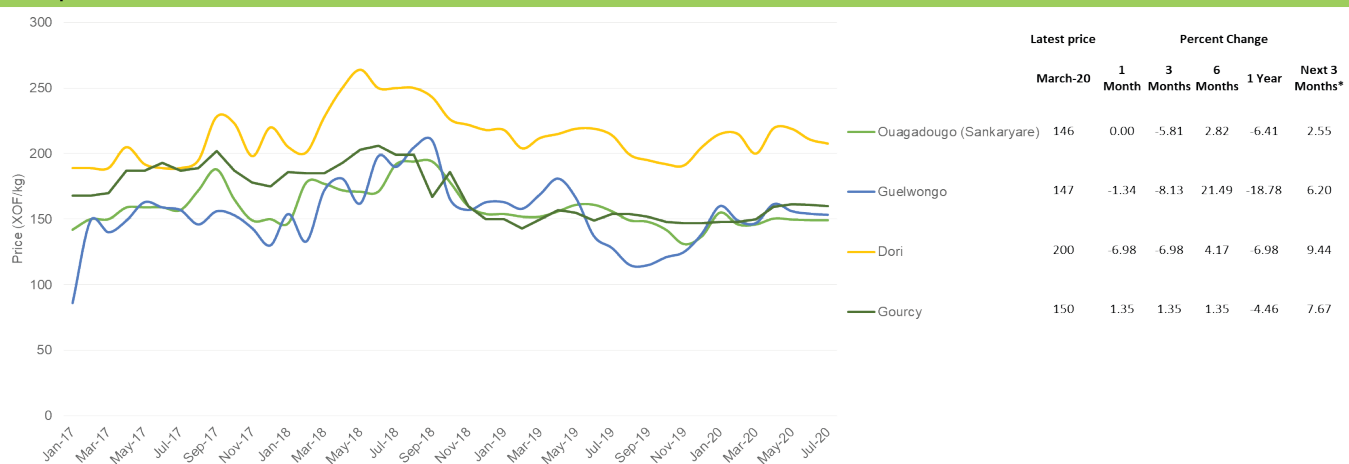
Mali: prices of sorghum, millet and maize remained stable or slightly increased but were lower than 2019 levels in several markets. Persisting insecurity continue to disrupt agriculture production and food markets in affected areas. Prices projected to decrease in the next 3 months with some small increase in other markets.

Niger: millet and sorghum prices increased in March and expected to increase further in the next 3 months although some markets will experience slight decreases. Imported rice prices remained stable indicating adequate market supplies. Nigeria's land border closure affecting availabilities in southern border markets. Burkina Faso closure of the main market of Ouagadougou on 25 March and panic buying is reported to have contributed to price increases in some markets (FAO, 2020).

Nigeria: prices of maize, sorghum and millet increased in some markets with slight decreases in some markets. The prices levels were lower than the previous year in the selected markets. Prices of imported rice continued to decline. Persistent insecurity affecting agriculture activities and food markets in the affected areas. Trade activities remain low near closed land borders.

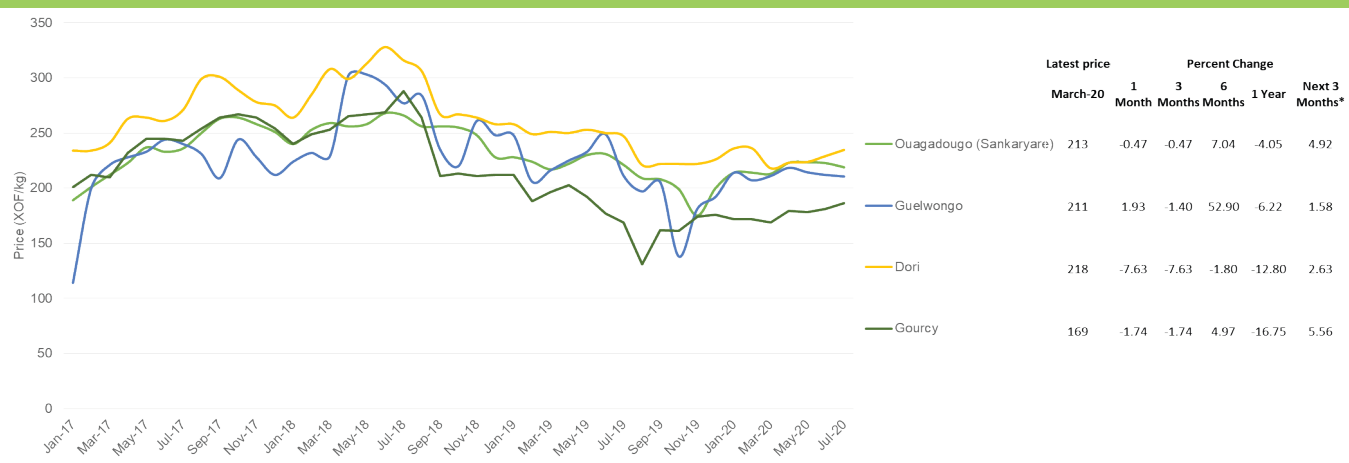
Togo: Maize and sorghum prices increased in March while that of imported rice remained stable with slight decreases in some markets.

Retail prices of maize in selected markets in Burkina Faso



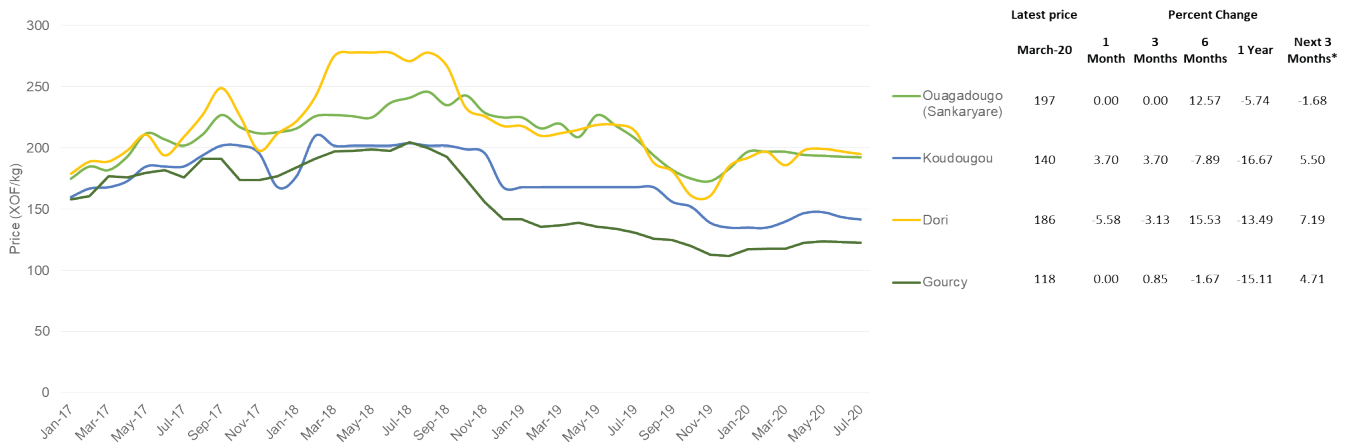
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of millet in selected markets in Burkina Faso



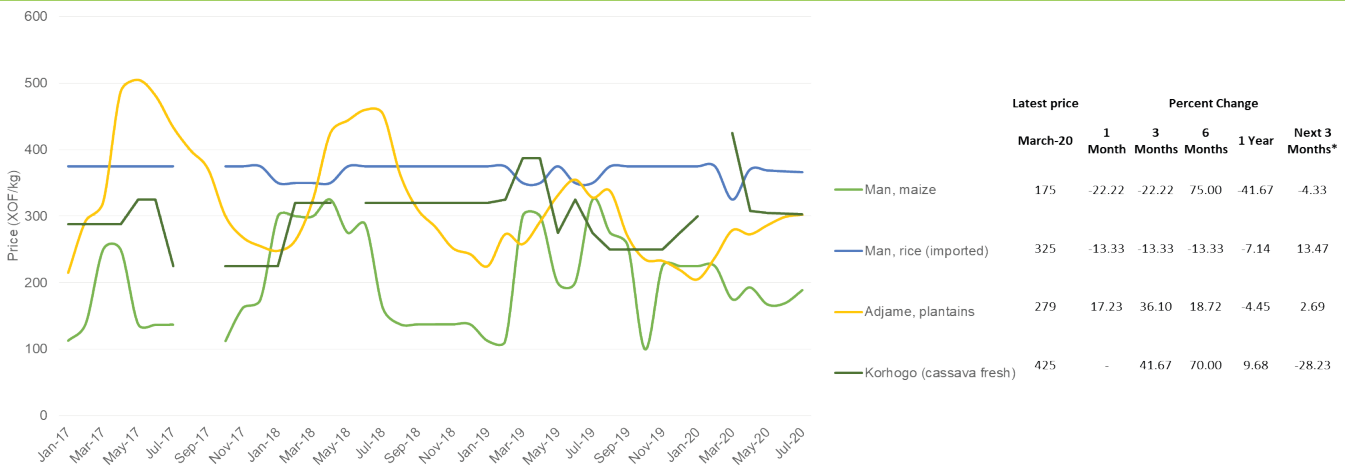
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of sorghum in selected markets in Burkina Faso



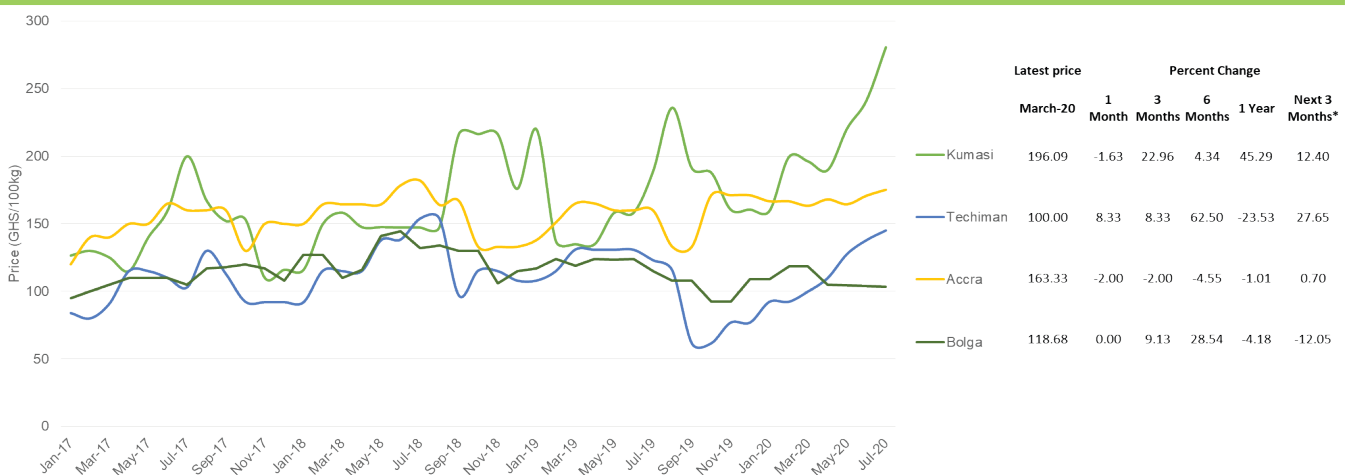
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of food crops in selected markets in Cote d'Ivoire



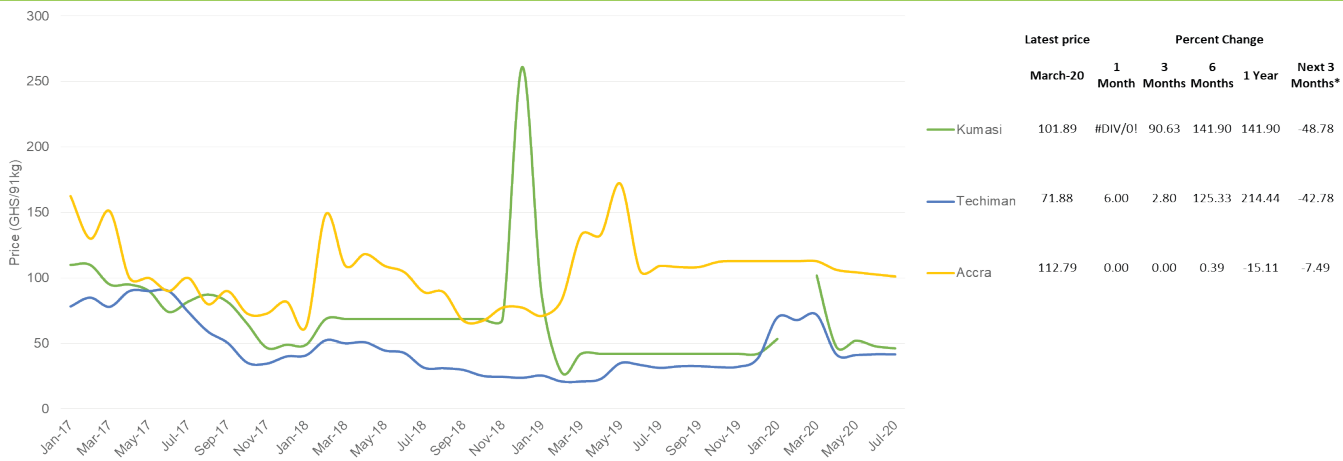
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Wholesale prices of maize in selected markets in Ghana



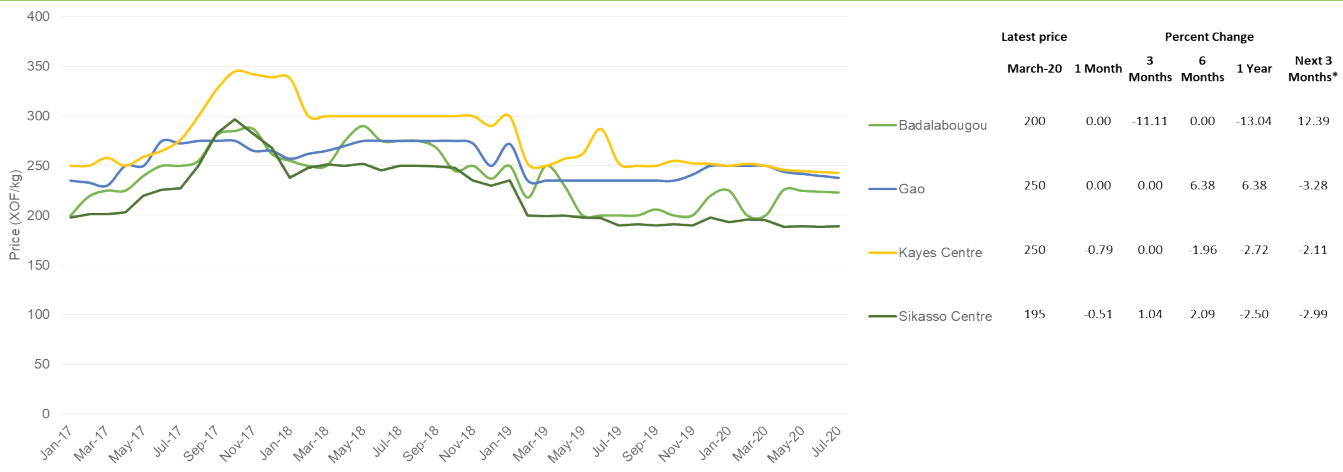
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Wholesale prices of cassava in selected markets in Ghana



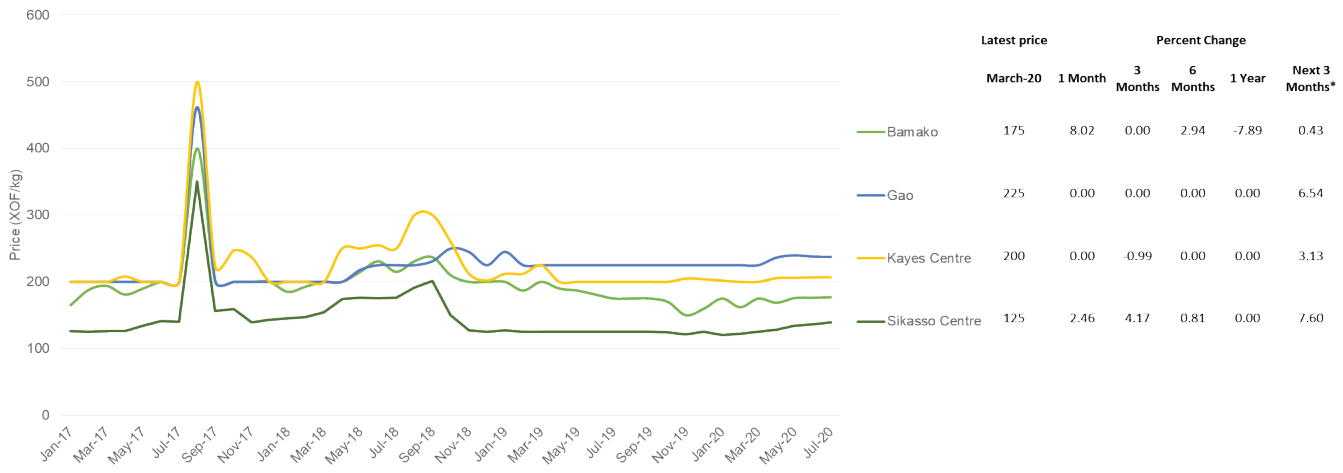
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of millet in selected markets in Mali



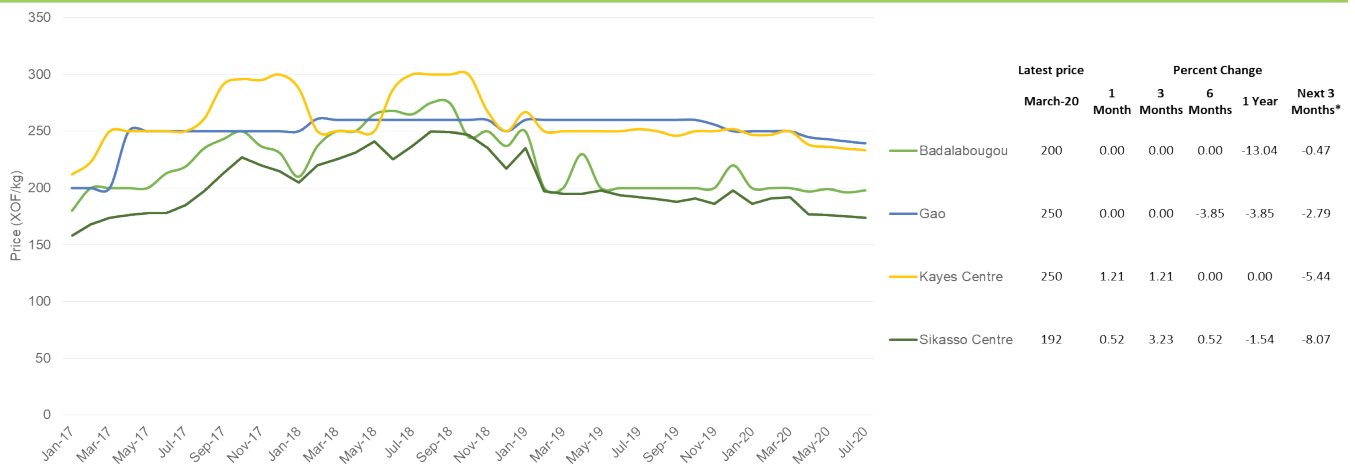
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of maize in selected markets in Mali



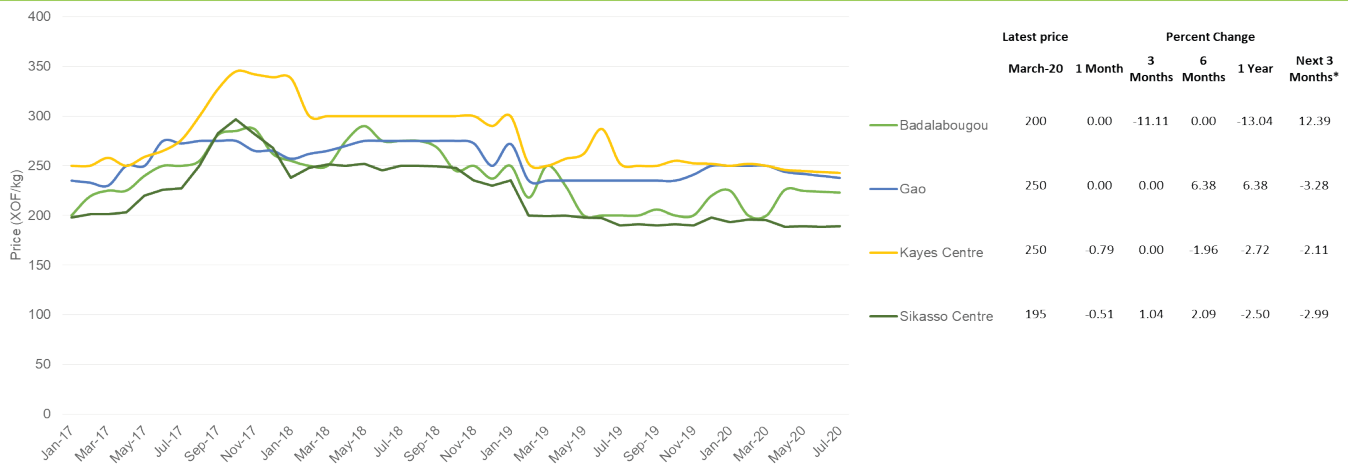
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of sorghum in selected markets in Mali



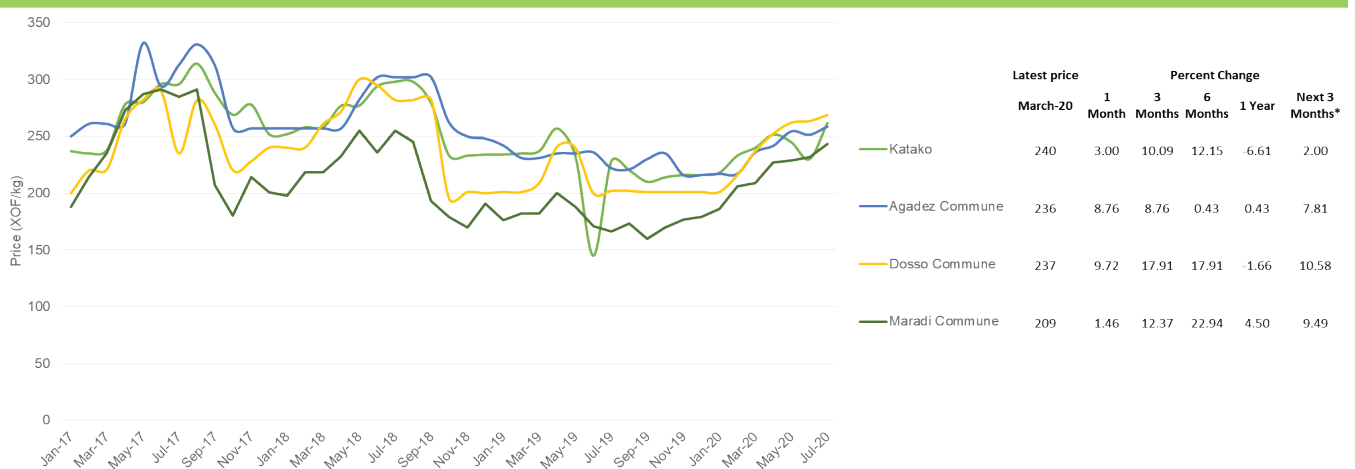
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of millet in selected markets in Mali



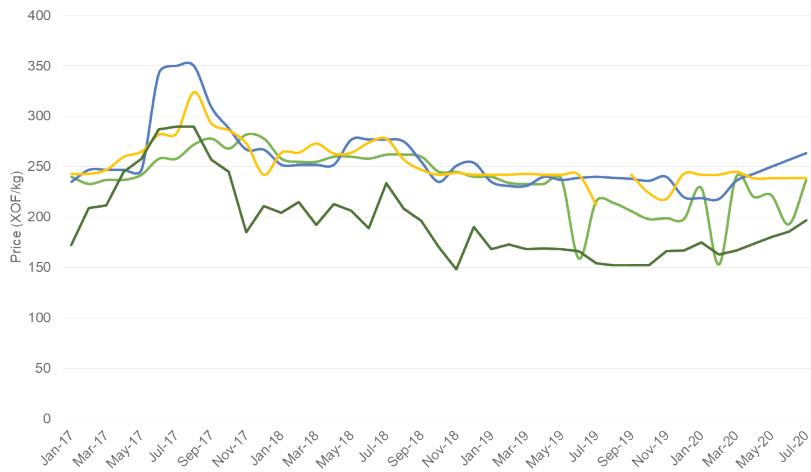
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of millet in selected markets in Niger



Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

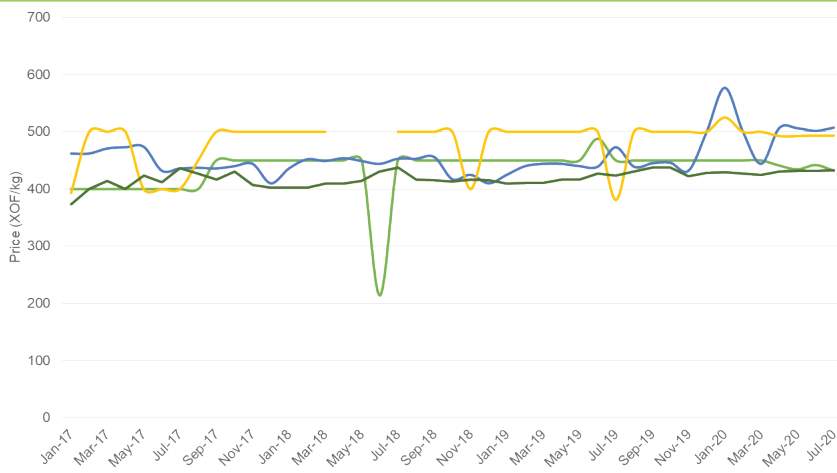
Retail prices of sorghum in selected markets in Niger



Latest price	Percent Change					
	March-20	1 Month	3 Months	6 Months	1 Year	Next 3 Months*
Katakò	240	56.86	4.80	21.21	3.00	-7.52
Agadez Commune	236	8.26	7.76	0.00	-1.67	5.95
Dosso Commune	245	1.24	1.24	9.38	1.24	-2.60
Maradi Commune	167	2.45	-4.57	9.87	-1.18	8.15

Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

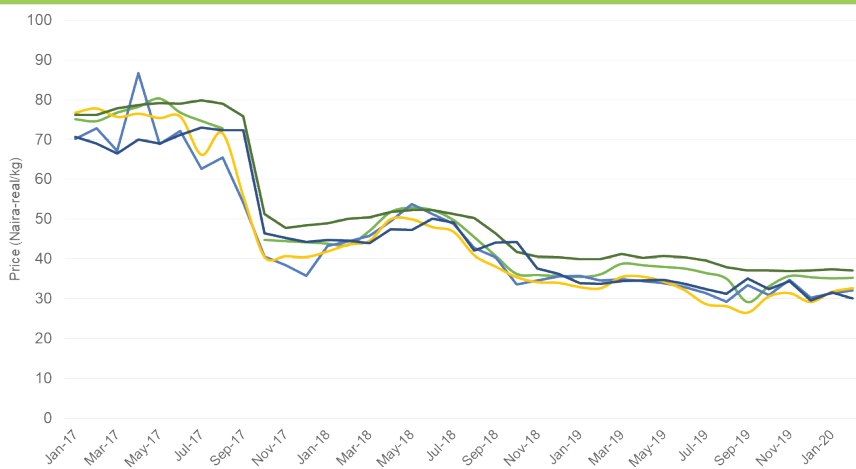
Retail prices of rice (imported) in selected markets in Niger



Latest price	Percent Change					
	March-20	1 Month	3 Months	6 Months	1 Year	Next 3 Months*
Katakò	450	0.00	0.00	0.00	0.00	-3.47
Kazoe	444	-11.20	-23.05	-0.45	0.00	14.03
Tillaberi Commune	500	0.00	-4.76	0.00	0.00	-1.48
Dan Issa	425	-0.47	-0.93	-2.97	1.92	1.55

Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

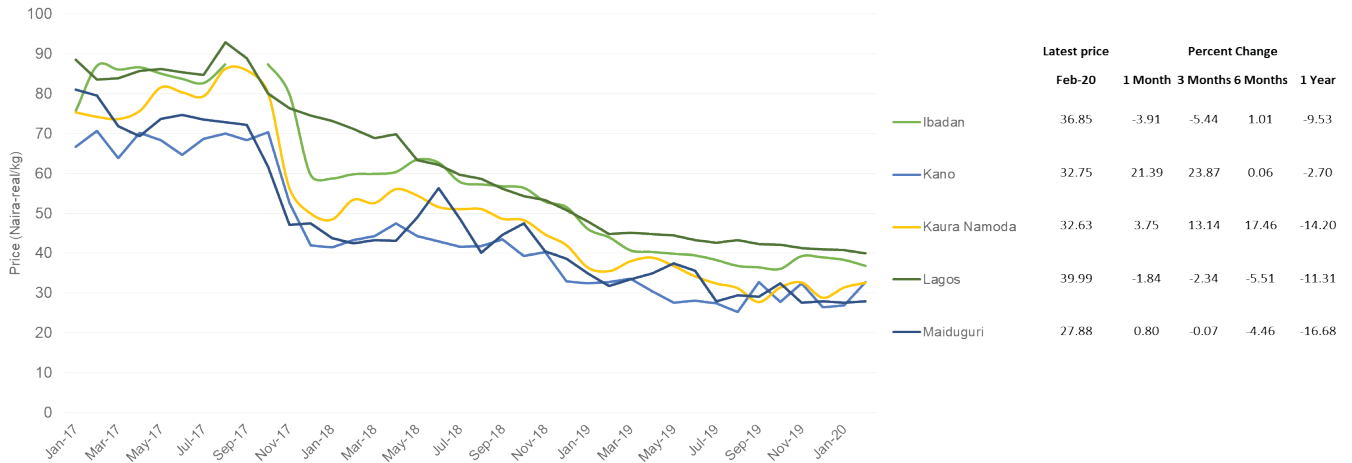
Wholesale prices of maize (white) in selected markets in Nigeria



Latest price	Percent Change				
	Feb-20	1 Month	3 Months	6 Months	1 Year
Ibadan	35.28	0.46	-0.42	20.90	-9.05
Kano	32.08	1.94	5.98	-4.07	-8.34
Kaura Namoda	32.67	2.96	11.85	23.28	-8.00
Lagos	37.11	1.01	0.24	-0.03	-10.17
Maiduguri	30.05	-4.66	1.28	-14.41	-12.72

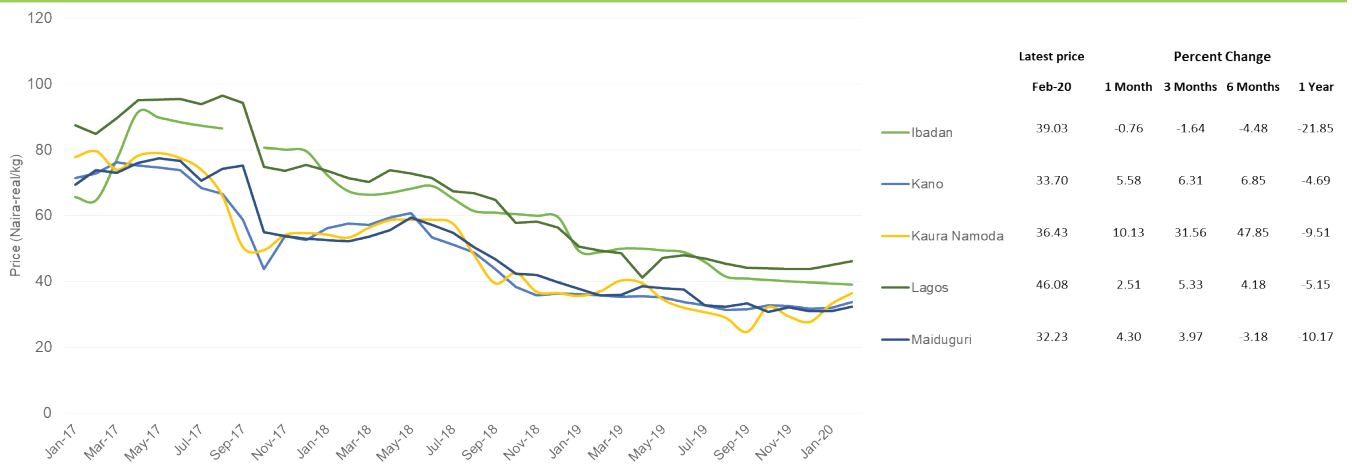
Source: Authors' construction based on data from FAO (2020)

Wholesale prices of sorghum in selected markets in Nigeria



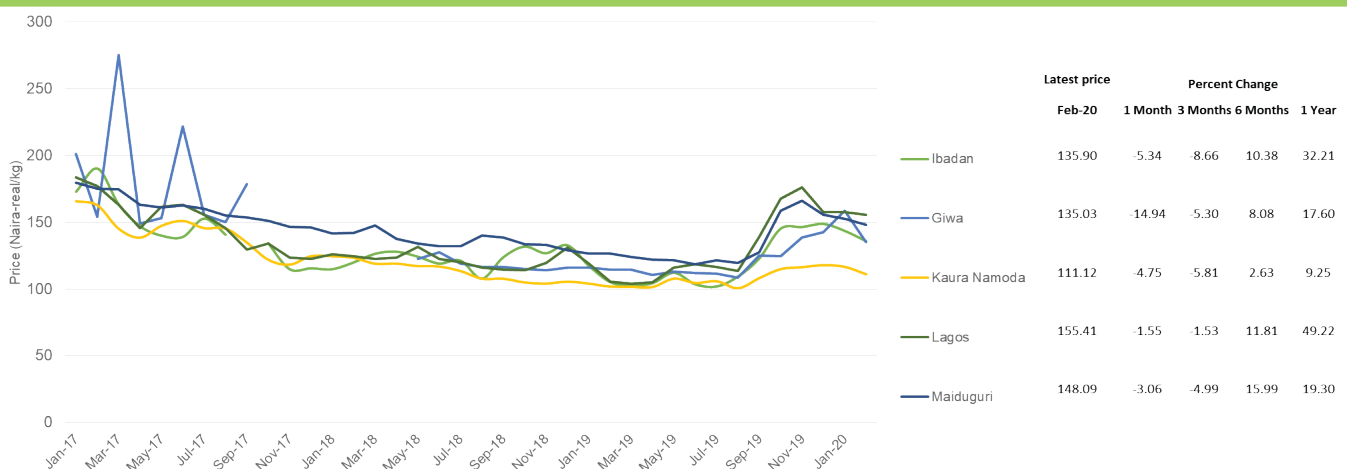
Source: Authors' construction based on data from FAO (2020)

Wholesale prices of millet in selected markets in Nigeria



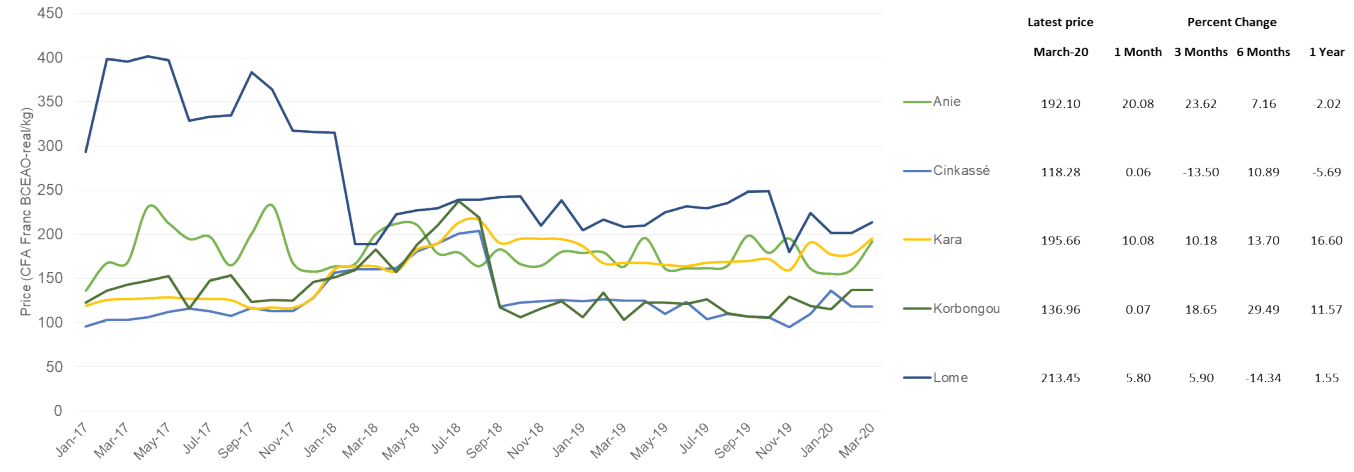
Source: Authors' construction based on data from FAO (2020)

Wholesale prices of rice (imported) in selected markets in Nigeria



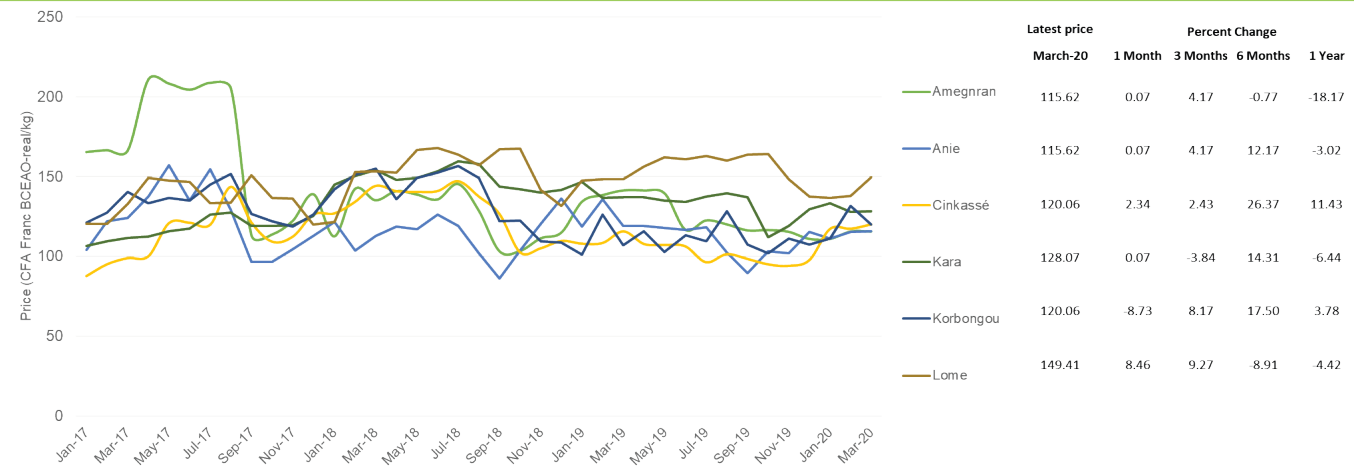
Source: Authors' construction based on data from FAO (2020)

Retail prices of sorghum in selected markets in Togo



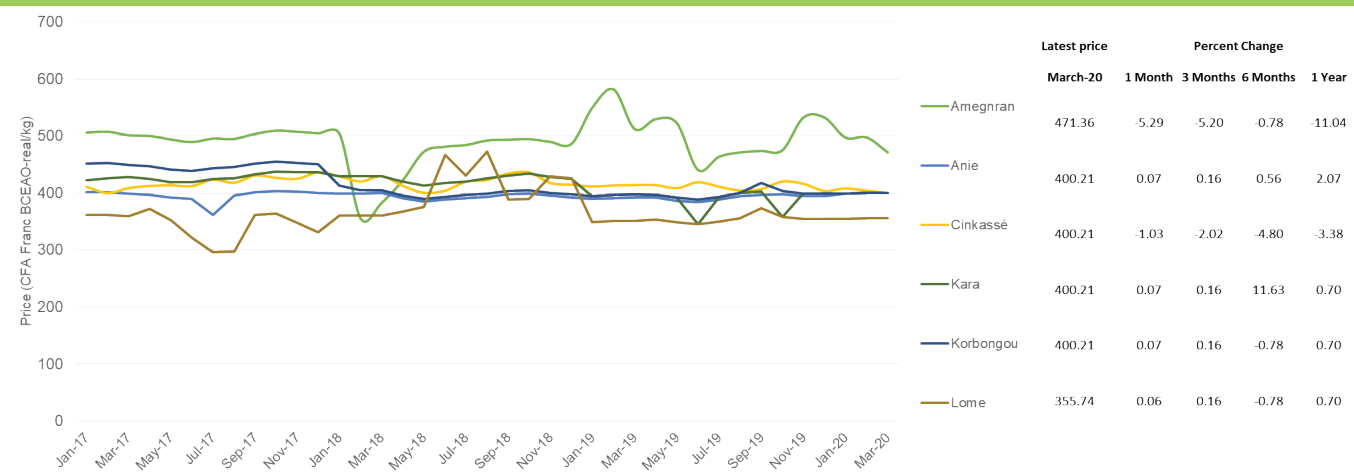
Source: Authors' construction based on data from FAO (2020)

Retail prices of maize in selected markets in Togo



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

Retail prices of rice (imported) in selected markets in Togo



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

6. FOOD SECURITY OUTLOOK

6.1 East Africa

The food security outlook for East Africa between February and May 2020 is presented in Figure 17. Despite favourable 2019 Kiremt and Deyr seasons, food security remains a challenge in Ethiopia worsened by factors such as: desert locust infestation, flooding, protracted impacts of poor harvests in past seasons, poor macroeconomic factors, conflict and insecurity (FEWSNET East Africa, 2020). The eastern parts of the country (including north-eastern and south-eastern parts) are projected to be in Stressed (IPC Phase 2) and Crises (IPC Phase 3) food insecurity outcomes between February and May 2020. Threats of reduced food production due to desert locusts upsurge in eastern, northern and south-eastern areas would contribute to decreased availability of food in these areas. This will contribute to pushing food prices up further affecting accessibility to food. Displacements in conflict affected western and southern Oromia areas are affecting livelihoods (including agricultural production), access to food and other humanitarian assistance. The ongoing conflicts also affect movement of food to deficit areas from surplus producing areas. Ensuring less disruptions in the movement of food from surplus to deficit areas is important to address food and nutrition security challenges.

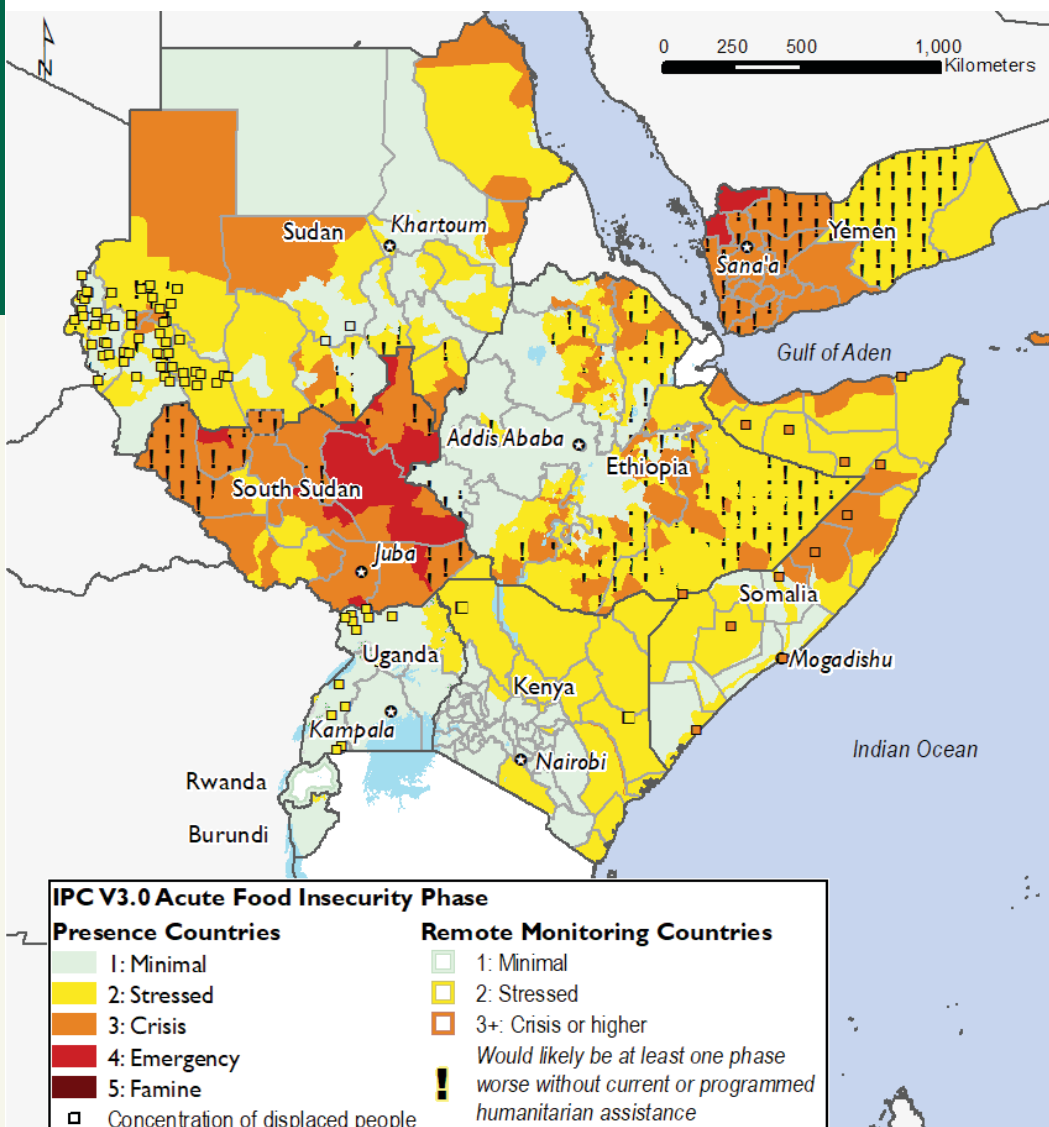


Figure 17: East Africa Food Security Classification (February 2020 - May 2020)

Source: FEWSNET East Africa (2020). East Africa Food Security Outlook February to September 2020

The IPC Kenya Acute Food Insecurity and Malnutrition analysis for the period February 2020 – July 2020 (issued in April 2020) estimated that 1.3 million of the population were already experiencing Crises (IPC Phase 3) or worse food security outcomes (IPC, 2020)²³. The contributing factors include recent floods during the October-December rains that affected livelihoods in areas such as Taita Taveta, Meru and West Pokot. The desert locust also contributed to minimal and localized damages in the infested areas²⁴ as most of the crops had reached maturity stage or had been harvested. Expected good harvests due to above-average forecast of March-May rains projected to result in near-normal crop production and improved livestock production leading to Minimal (IPC Phase 1) or Stressed (IPC Phase 2) outcomes up to September 2020 (FEWSNET East Africa, 2020). Tight regional supply, delayed unimodal maize harvest and below-average bean harvest pushing maize and bean prices up despite improved availability in early 2020 compared to late 2019. For example bean prices increased by between 3% and 9% in Mombasa, Eldoret and Nakuru in February 2020 (see Section 5.1). Increasing staple food prices affects accessibility to food especially for most of the poor already vulnerable to income losses due to the current COVID-19 pandemic and existing vulnerabilities.

In Uganda, the above-average rainfall for March-May and favourable crop and livestock growing conditions expected to contribute to normal season and improved access to food and income resulting in Minimal (IPC Phase 1) outcomes up to September 2020. The households affected by heavy rainfall, flooding and landslides in late 2019 are projected to experience Stressed (IPC Phase 2) or worse outcomes up to September because of limited resources to access food and income. Increasing staple food prices across the country affecting access to food particularly for the poor households in Karamoja and disaster affected households in western and eastern parts of the country (FEWSNET East Africa, 2020).

In Rwanda, the above-average 2020 season harvests contributed to increased food availability. Minimal (IPC Phase 1) food security outcomes are projected across the country up to September 2020. This is due to increased food availability and expected favourable harvest in May/June (FEWSNET East Africa, 2020). Increased food supplies to the market have contributed to decreasing staple food prices in the past three months (see section 5.1).

The regional above-average rainfall forecast for March-May and favourable growing conditions expected to lead to favourable crop harvests in the current season. However, these projections are also threatened by the current desert locust infestation and seasonal floods. The impacts of desert locusts on food security outcomes are expected to be significant in areas with limited control measures and already food insecure households with limited coping capacity.

6.2 Southern Africa

Figure 18 shows the food security outlook for the Southern Africa region for the period February – May 2020. The region is experiencing and project to face Stressed (IPC Phase 2) and Crises (IPC Phase 3) food insecurity outcomes in parts of Zimbabwe, Mozambique, DRC, Lesotho and Madagascar. In the affected areas households depend on markets to access food and inadequate resources constrain their ability to purchase food. The 2020 harvest is expected to temporarily improve availability of food starting from April across much of the region. However, areas in Madagascar, Mozambique and Zimbabwe that were affected by dry conditions at the beginning of the season in late 2019 experienced complete crop failure and or below average harvests. The impacts of drought on agricultural sector performance and food availability requires increased efforts in building resilience of farming systems and food value chains in the region. These areas are projected to experienced Crises (IPC Phase 3) outcomes. The rest of the region is expected to experience Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes particularly areas that benefited from the improved rainfall in mid-January and February such as Malawi and Zambia.

The good harvest in early 2020 are contributing to decreasing prices across the region (see Section 5.1). Despite good harvests in some parts, staple food prices are expected to remain above average. In addition, the prices are projected to increase from June in parts of the region affecting access to food especially for already food insecure and vulnerable populations.

²³ IPC. 2020. IPC Kenya Acute Food Insecurity and Malnutrition analysis. Integrated Food Security Phase Classification.

²⁴ The affected areas include: Marsabit, Mandera, Wajir, Isiolo, Garissa, Kitui, Tana River, Kajiado, Baringo, Turkana, Embu, Tharaka Nithi, Samburu, Makueni, and Meru (IPC, 2020).

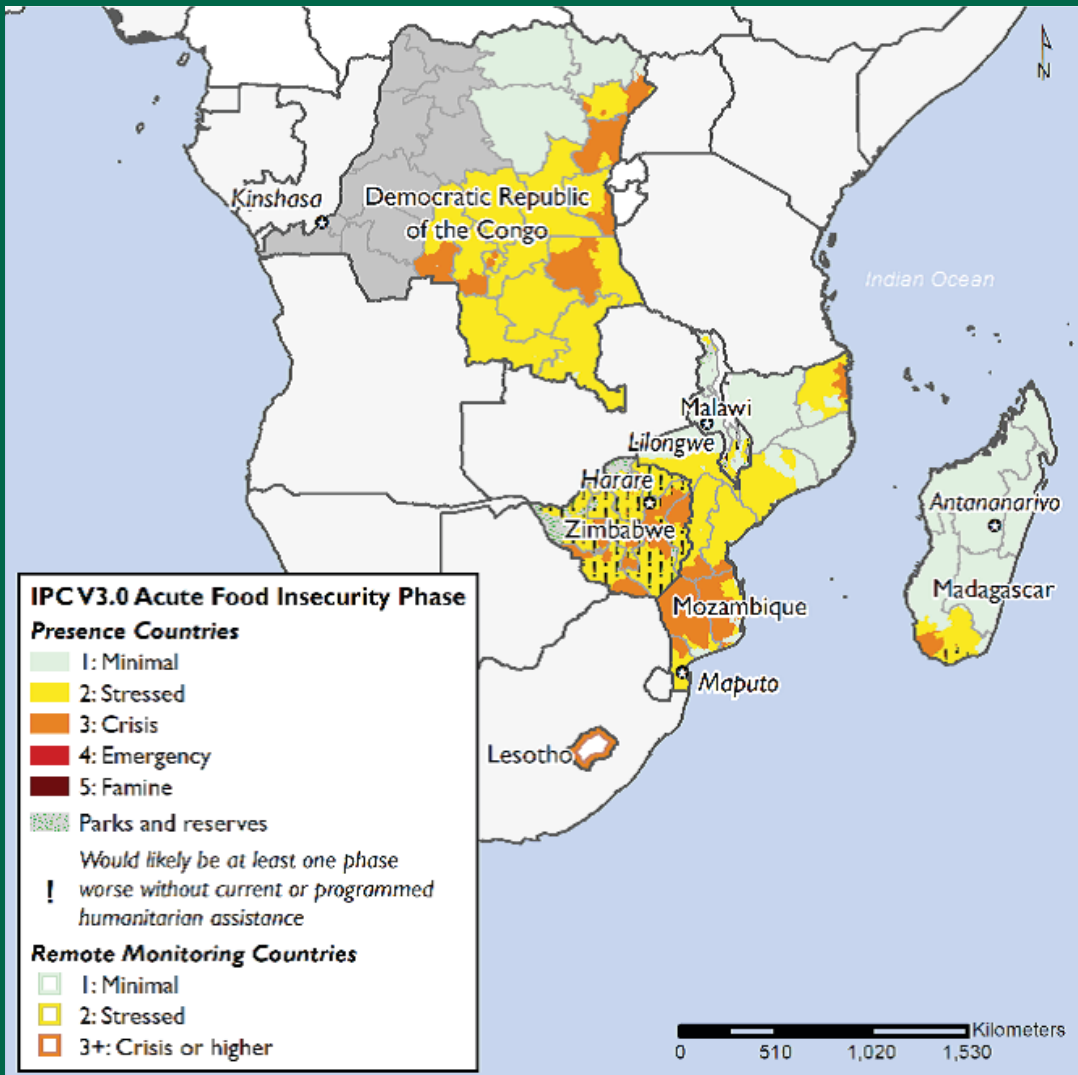


Figure 18: Southern Africa Food Security Classification (February 2020 - May 2020)

Source: FEWSNET Southern Africa (2020) Southern Africa Food Security Outlook, February to September 2020

The January-February rains contributed to improved growing conditions and expected above average harvests for most crops in Malawi. Staple food prices are expected to decrease due to the current harvests and improved food availability. However the government set the ADMARC buying price for the staple maize at MWK 310/kg and this likely keep food prices high across the country. The food price decreases in staple foods will not be sustained for long (see Section 5.2). In April and May southern districts and the Karonga district in the north are projected to experience Stressed (IPC Phase 2) outcomes and the rest of the country is projected to experience Minimal (IPC Phase 1) outcomes up to September 2020.

Most parts of Mozambique are expected to have Stressed (IPC Phase 2) outcomes with the southern parts and parts of Cabo Delgado expected to experience Crises (IPC Phase 3) outcomes between April and May 2020. The worst affected areas especially in the south experienced severe dry conditions from the beginning of the main cropping season while heavy rainfall and floods in the north in late December resulted in loss of life and livelihoods as well as destruction to infrastructure. Harvests in these areas are significantly below average. Staple food prices are expected to decrease due to increased food availability from the harvest and increase from July onwards (see Section 5.2). The consistently above average staple food prices affect access to food particularly among the poor and vulnerable households pushing acute food security outcomes in areas that depend on markets to access food.

Macroeconomic challenges²⁵ and poor harvests for three consecutive years due to droughts in Zimbabwe are pushing staple food prices up further worsening food security outcomes. Most of the country face worst food security emergencies in its history exacerbated by recurring droughts and the poor macroeconomic conditions. Poor households face constrained resources to meet basic food and non-food needs. Most of the country is expected to experience Crises (IPC Phase 3) and Stressed (IPC Phase 2) outcomes. The April/May harvest

²⁵ The macroeconomic challenges include: shortages of foreign and local currency, volatile black market exchange rates, high inflation and shortages of some basic food items (especially maize meal).

is expected to be significantly below average due to consecutive drought year and poor access to production inputs. Movement of food from surplus areas (especially in the region) through Humanitarian assistance and food trade remains critical to sustain food requirements in the country.

6.3 West Africa

The food security outlook for West Africa for the period February – May 2020 is presented in Figure 19. Most of the region is expected to experience Minimal (IPC Phase 1) outcomes up to September 2020. The ongoing insecurity and armed conflict continue to affect agricultural production activities and food security outcomes in the affected areas. The following regions are expected to experience Crises (IPC Phase 3) up to September 2020: the Centre-North and Sahel regions and the provinces of Loroum, Komondjari and Gnagna in Burkina Faso, the Western Sahel and Liptako Gourma in Mali, Tillabéry region of Niger, the eastern CAR and the English-speaking regions of Cameroon, and north-eastern Nigeria. The off-season harvests contributed to improved availability of food and household incomes for most parts of the region except in conflict areas. Conflict affected areas continue to experience loss of livelihoods, displacements and worsening food security outcomes. The persistent insecurity and armed conflict has disrupted agricultural production activities and food markets affecting movement of agricultural inputs, food supplies and provision of humanitarian assistance to affected areas. Across the region, market food supply is above average and stable including large carryover stocks while demand is below average except in deficit and insecurity affected areas. The closure of the land borders in Nigeria continue to impede internal and regional food trade especially with Benin, Cameroon and Niger (FEWSNET West Africa, 2020). Prices of staple foods remain below average except in deficit and conflict affected areas (see Section 5.3). The price of cereals is expected to be below or near average for rest of the year although it would be above last year’s levels in many markets across the region.

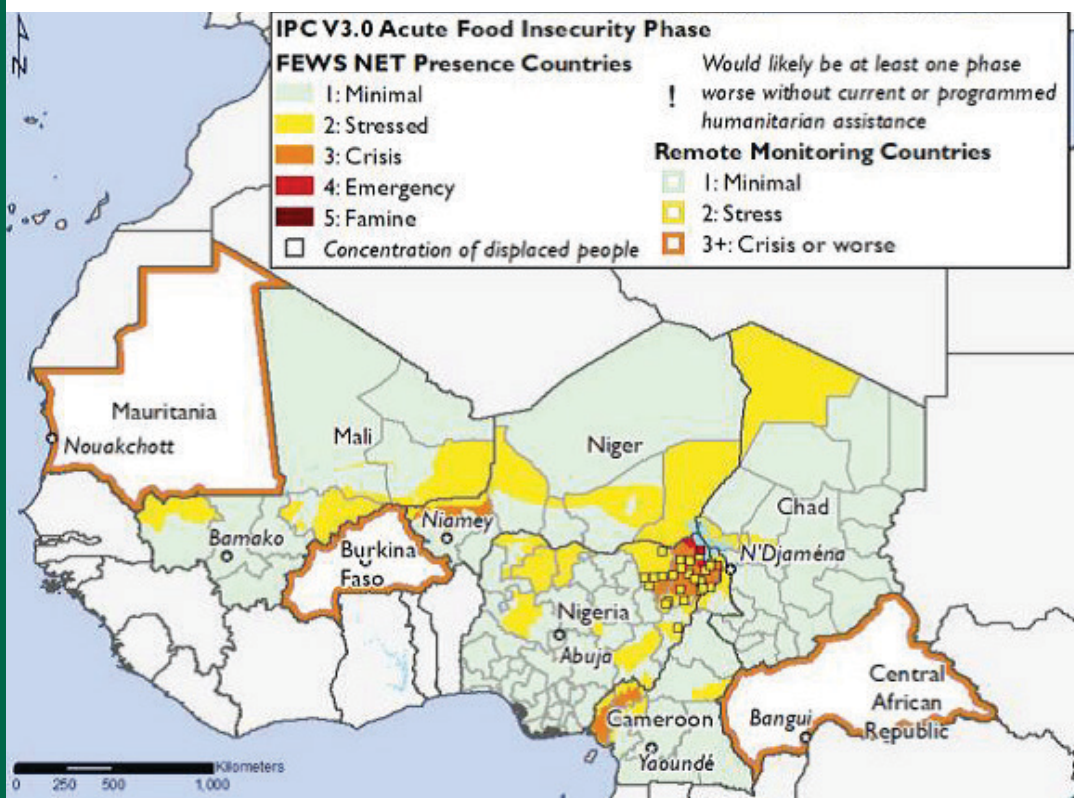


Figure 19: Projected food security outcomes, February - May 2020
 Source: FEWSNET West Africa, (2020) West Africa Food Security Outlook, March to September 2020

7. CONCLUSIONS

The report presented an overview of the weather/climatic conditions, policy developments, the 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 favourable rains and cropping conditions in East Africa are expected to contribute to improved seasonal harvests and food availability at the end of the season. However, ongoing desert locust upsurge poses a threat to food production in affected parts of Ethiopia, Kenya, Somalia and Uganda. Overall, the expected good seasonal harvest will likely contribute to improve food availability in the region and food price reductions. The combination of increased food availability and price reductions especially for staple foods will help ease access to food in the region although there are also threats from new upsurge of desert locust as well as impacts of the current COVID-19 pandemic. The areas with limited control measures and already experiencing severe food insecurity (IPC Phase 2+) conditions are expected to severely suffer from the desert locust threat due to low coping capacity and significant crop losses.

Southern Africa is currently in the harvesting period of the main cropping season and most parts of the region will be dry in the month of May except in parts of South Africa that are entering into winter planting. The extended dry conditions at the start of the main cropping season in Southern Africa affected production of staple food crops particularly in southern Mozambique, Zimbabwe, Madagascar, Namibia and central South Africa. Southern parts of Mozambique and most parts of Zimbabwe experienced the poorest rainfall in the region that led to unfavourable cropping conditions and significantly below average seasonal harvests. Food availability across Zimbabwe remains below average with most areas experiencing food deficits. There is need for significant efforts to ensure food availability through food trade and humanitarian assistance across the country. Recurring climate shocks in Southern Africa have significantly contributed to reduced food production and availability driving prices up. Steep food price increases in Zambia as well as inadequate financial resources significantly affect household

access to food. Limited purchasing power means that the majority of the poor remain in food insecurity conditions even if there is food in the market. Prices of staple food expected to fall in parts of the region that have experienced good harvests. The region is experiencing and is projected to face Stressed (IPC Phase 2) and Crises (IPC Phase 3) food insecurity outcomes in parts of Zimbabwe, Mozambique, DRC, Lesotho and Madagascar.

West Africa is projected to experience above normal rains in May. The favourable rains coincide with the planting that started in March for the main season across the southern parts of West Africa. Persistent insecurity and armed conflict affecting agricultural activities and disrupting markets in affected areas. The major hotspots of insecurity and armed conflicts in West Africa are the Lake Chad Basin (covering sub-national areas in Chad, Cameroon, Niger and northern Nigeria) and the Central Sahel (consisting of central and northern Burkina Faso, Mali and Niger). Insecurity and armed conflict in these areas lead to destruction/closure of livelihoods and basic social services, disruption of: productive activities (including agriculture), markets and trade flows. Prices of staple foods remain below average except in deficit and conflict affected areas. The price of cereals is expected to be below or near average for rest of the year although it would be above last year's levels in many markets across the region. 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 COVID-19 pandemic shocks affects the whole food system (at national and global levels) from primary supply, processing, trade, logistical systems (national, regional and international), intermediate and final demand. Food trade is important to meet food and nutrition requirements in countries that experience domestic production shortfalls. COVID-19 induced logistical challenges and disruptions on critical transport routes are expected to unsettle global markets for basic staples than food supply shortages. Governments have put in place total and partial lockdown, governance and socio-economic, public health and social distancing measures to control the spread and impacts of the pandemic.



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