

FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

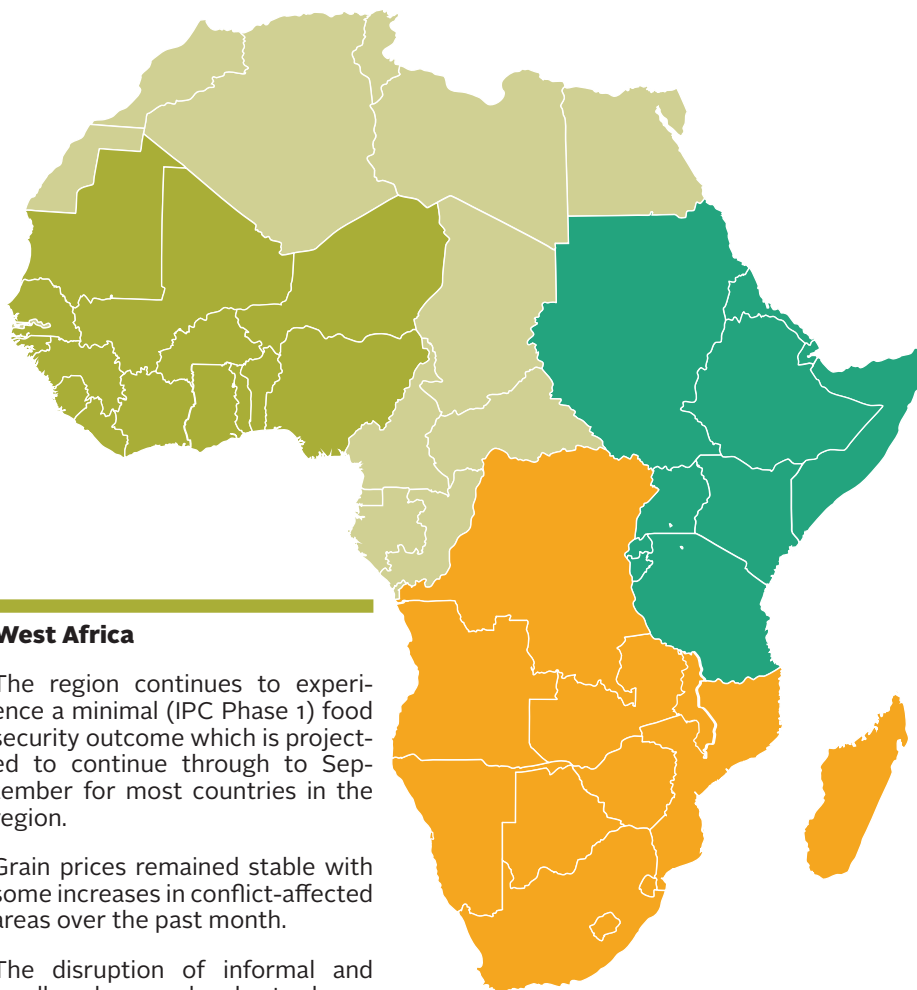
#3 - May 2020



BILL & MELINDA
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REGIONAL HIGHLIGHTS



West Africa

- The region continues to experience a minimal (IPC Phase 1) food security outcome which is projected to continue through to September for most countries in the region.
- Grain prices remained stable with some increases in conflict-affected areas over the past month.
- The disruption of informal and small-scale cross border trade activities has reduced the effective food demand as a result of lost incomes as COVID-19 pandemic containment measures persisted across the region.
- The region is expected to experience normal to above normal seasonal rainfall performance through to the end of June, which will be beneficial to the cropping season that is underway.
- The current cropping conditions show favourable cropping conditions especially for the southern parts of the region covering Cote d'Ivoire, Ghana, Togo, Nigeria, and Mali.
- Despite favorable cropping conditions, the region faces multiple risks that include climate change and variability, persistent insecurity and armed conflict. Also, the COVID-19 pandemic and mitigation measures have disrupted farming systems across the world.
- Food stocks were generally low in most countries with consumption levels exceeding production levels for the month.

Southern Africa

- Food security outcomes improved from food crisis to stressed and minimal food security phases due to the increased food availability since the region is currently under its main harvest period over April/ May 2020.
- The beginning of the main harvest season in the past two months has seen an increase in food availability and contributed to a general price decline across Southern Africa, although prices remain above prices of the previous years and are sustained by below average harvests in the previous seasons.
- The secondary impacts of COVID-19 continue to restrict food distribution activities, and the isolated cases of panic buying contributes to prices hikes in some areas. Trade activities continue but remain restricted due to COVID-19 containment measures.
- The cropping conditions for the current month are out of season for most parts of the region, with watch and poor conditions respectively for parts of Lesotho, Mozambique, Zambia and Zimbabwe.

East Africa

- The East African region experienced an IPC v3.0 Acute Food Insecurity Phase which is exacerbated by the COVID-19 pandemic and desert locust infestations that have reduced food distribution efforts and led to significant food losses across selected countries in the region.
- Commodity prices varied over the past month but remained generally high compared to prices recorded over the same period during the previous year sustained by the disruption of marketing and trade activities, as well as panic-buying related to the COVID-19 pandemic.
- The wetter than usual season for most parts of the region provided beneficial cropping conditions for the on-going planting activities and crop development in the bi-modal areas.
- The risk of flooding increased due to persistent above normal rains with some parts of the region experiencing localized flooding has had an adverse impact on livelihoods and cropland losses with detrimental impacts on food and nutrition security in the affected areas.
- The desert locust upsurge across parts of East Africa remains a significant threat to cropping activities in the region, particularly in Ethiopia, Kenya and Somalia, with small areas affected in Djibouti, Eritrea, South Sudan, Sudan and Uganda.
- In addition, the wetter conditions provided conducive breeding environments and increased the risk of the desert locust upsurge.
- The region is entering the dry season and is not expected to receive rainfall during the month of June in most parts of southwestern Africa. For the parts of the region expected to receive rainfall, especially in southwestern South Africa, there will be a mix of below normal and above normal rainfall experiences.

1. INTRODUCTION

The AGRA Food Security Monitor discusses rainfall changes/forecasts, temperature and environmental conditions; a review of government interventions that impact on food trade (domestic and regional); an overview assessment of the prices of main food staples and the food security outlook in the 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 discussions focus on the implications of the developments and changes on regional food trade in each of the regions.

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

2.1 East Africa

The season forecast (June to September) from the IGAD Climate Prediction and Application Center for the East Africa region presented in Figure 1, indicates a wetter than usual season across the region covering the following areas: southwestern Ethiopia, western Kenya, south eastern South Sudan, western and central Sudan, eastern and central Uganda. Usual rainfall is expected for the rest of the region except in limited parts of coastal Somalia which are predicted to receive less than usual rainfall. Seasonal temperature forecasts show a warmer than usual season in parts of the region that include: Burundi, central Ethiopia, coastal parts from Eritrea to Tanzania, Rwanda and South Sudan. On the other hand, central parts of the region, western Ethiopia, central and eastern South Sudan, and the Lake Victoria basin are predicted to experience a colder than usual season (ICPAC, 2020). The wetter than usual season rains for most parts of the region provide beneficial cropping conditions for the on-going planting activities and crop development in the bi-modal areas. This is beneficial to expected seasonal harvest, food availability and food and nutrition security in the region.

However, the cropping conditions as of 28 April 2020, from the Crop Monitor for Early Warning indicate a watch outlook for most parts of the region (Figure 2). The region's expected harvests from the ongoing planting season area threatened by multiple challenges that include extreme weather (especially flooding in some parts), desert locust upsurge and the COVID-19 pandemic. The risk of flooding increased due to persistent above normal rains and some parts have experienced localized flooding with adverse impacts on livelihoods and cropland losses causing detrimental impacts on food and nutrition security in the affected areas. In addition, the wetter conditions also increased the risk of the desert locust upsurge by providing conducive breeding environments.

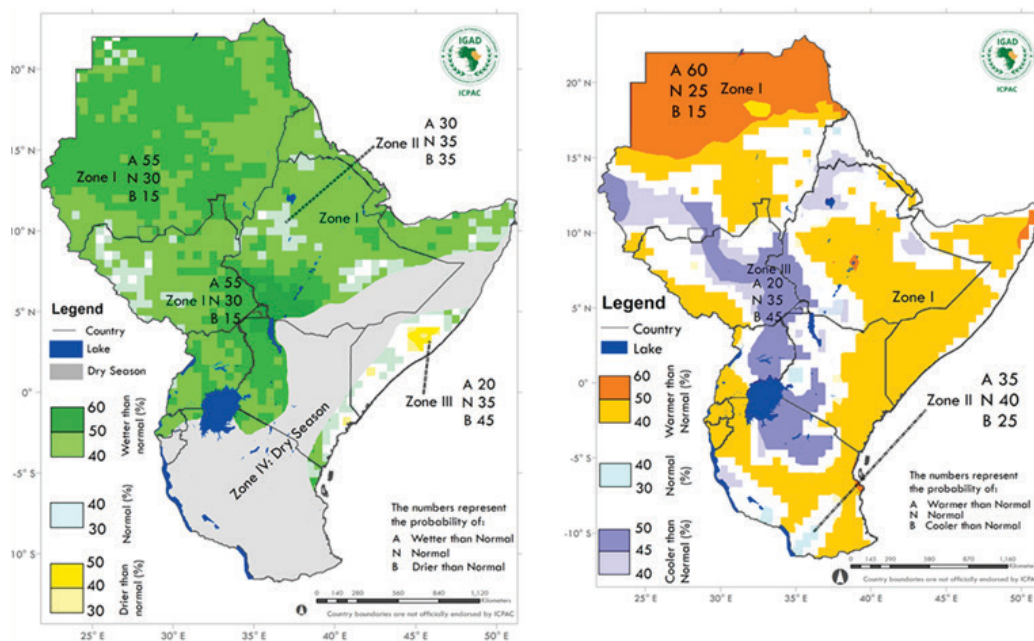


Figure 1: East Africa Seasonal Forecast June to September 2020

Source: ICPAC (2020)

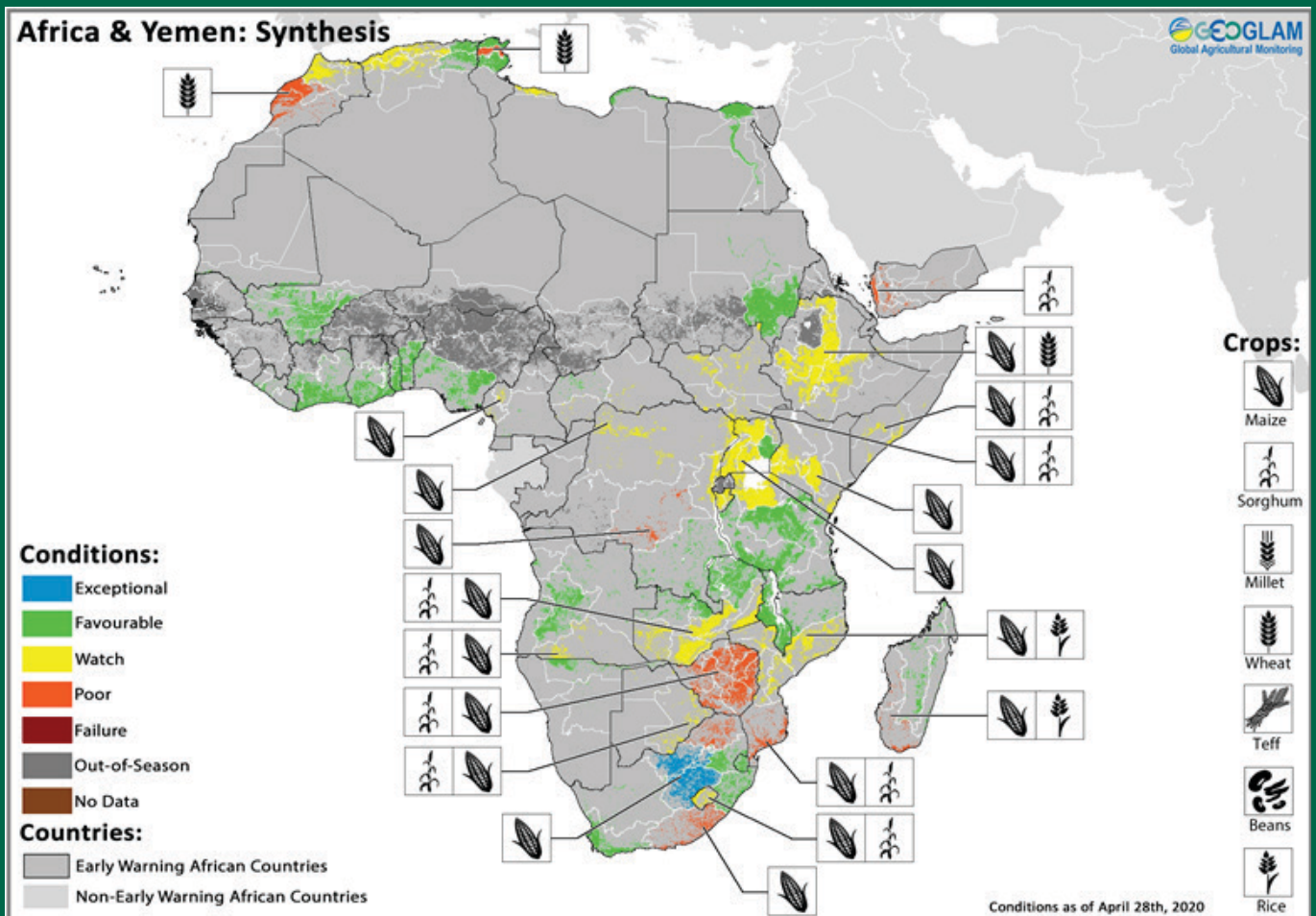


Figure 2: Synthesis of crop conditions as of 28 April 2020

Source: <https://cropmonitor.org/> Accessed 20 May 2020

Additionally, the on-going COVID-19 pandemic and mitigation measures are disrupting and threatening food systems across the region. These are among the multiple stressors and risk factors threatening the seasonal harvest outlook, and unless they are adequately addressed through the food trade, affected areas are highly likely to experience food shortages and price spikes. The movement of food from strategic surplus areas in the region remains critical to containing localized food shortages.

Flooding destroys rice worth KES 800 million and displaces villagers at Ahero and West Kano irrigation schemes'

The flooding experienced in different parts of the East Africa region due to persistent above-normal rains in the current season led to the River Nyando breaking its banks and the destruction of farmlands in the Ahero and West Kano irrigation schemes. The floods destroyed critical infrastructure which included roads, bridges, canals and culverts as well as farmers' houses. Crops (mainly rice, maize and beans) on over 4,000 acres (1619 hectares) of land with an estimated value of over KES 800 million (US\$ 7.4 million), were destroyed by the floods posing a threat to food availability, as well as food and nutrition security.



2.2 Southern Africa

The June forecasts of precipitation and temperature anomalies in Africa are presented in Figures 3 and 4 respectively. In addition, Figure 5 shows the Seasonal Rainfall Performance Probability (SPP) Analysis across the continent for the period 01 May 2020 to 30 June 2020. The SPP provides quantitative evaluation of the probability of precipitation finishing at predefined percent-of-normal anomaly categories that correspond to below-average (< 80% of normal), average (80%-120% of normal) and above average (> 120% of normal) conditions (Novella and Thiaw, 2016).² Harvesting of the main season crops is ongoing in parts of the region. The Southern Africa region is entering the dry season for most parts except for the southwestern parts of South Africa. The rest of the region is not expected to receive rainfall during the month of June. For the parts of the region expected to receive rainfall, especially in southwestern South Africa, there will be a mixture of below normal and above normal rainfall experiences.

The cropping conditions map (Figure 2) shows out of season for most parts of the region, watch and poor conditions respectively for parts of Lesotho, Mozambique, Zambia and Zimbabwe. As indicated in the Food Security Monitor for April 2020³ these areas also experienced poor seasonal cropping conditions for the main season and are expected to have below average yields. Most parts of Malawi and Eswatini, northeastern Zambia, eastern and western South Africa and western Angola indicate favourable cropping conditions. These are mainly driven by favourable rainfall received in the previous months. Parts of central South Africa show exceptional cropping conditions which are beneficial for the winter cropping season.

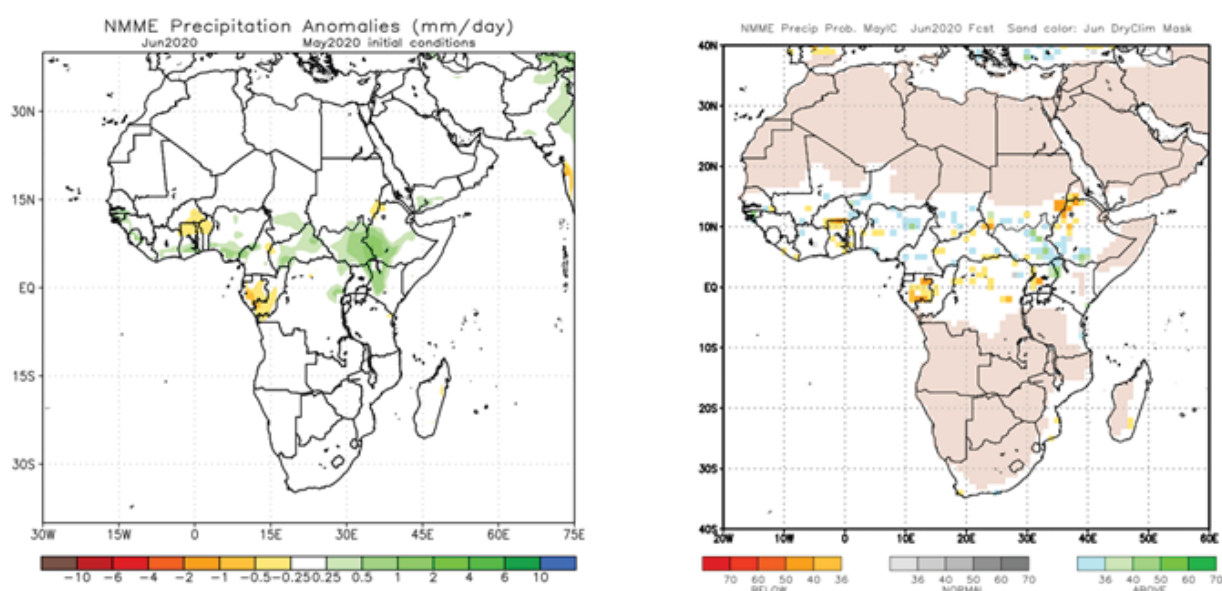


Figure 3: North American Multi Model Ensemble (NMME) rainfall forecast for May 2020, based on May 2020 initial conditions

The image on the left shows the probabilistic forecast and the image on the right 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

As in other parts of the continent, the COVID-19 pandemic has added to the multiple challenges that the region's food systems are already grappling with, namely climate change and variability (including extreme events like droughts and flooding), rapid urbanisation, and rising food and nutrition insecurity. The areas expected to receive below-average seasonal harvests due to poor cropping conditions are further threatened by food trade disruptions occasioned by the COVID-19 pandemic and some of the mitigation measures to control its spread that are impacting the movement of food from strategic areas of surplus to deficit regions.

¹ <https://www.kenyanews.go.ke/agony-as-ahero-floods-destroy-sh-800-million-rice-displace-villagers/>. Accessed 21 May 2020

² Novella, N. and Thiaw, W., 2016. A Seasonal Rainfall Performance Probability Tool for Famine Early Warning Systems over Africa. *Climate Prediction S&T Digest*, p.159-163.

³ GRA. 2020. AGRA Food Security Monitor. No 2 April 2020. Alliance for the Green Revolution in Africa, Nairobi, Kenya.

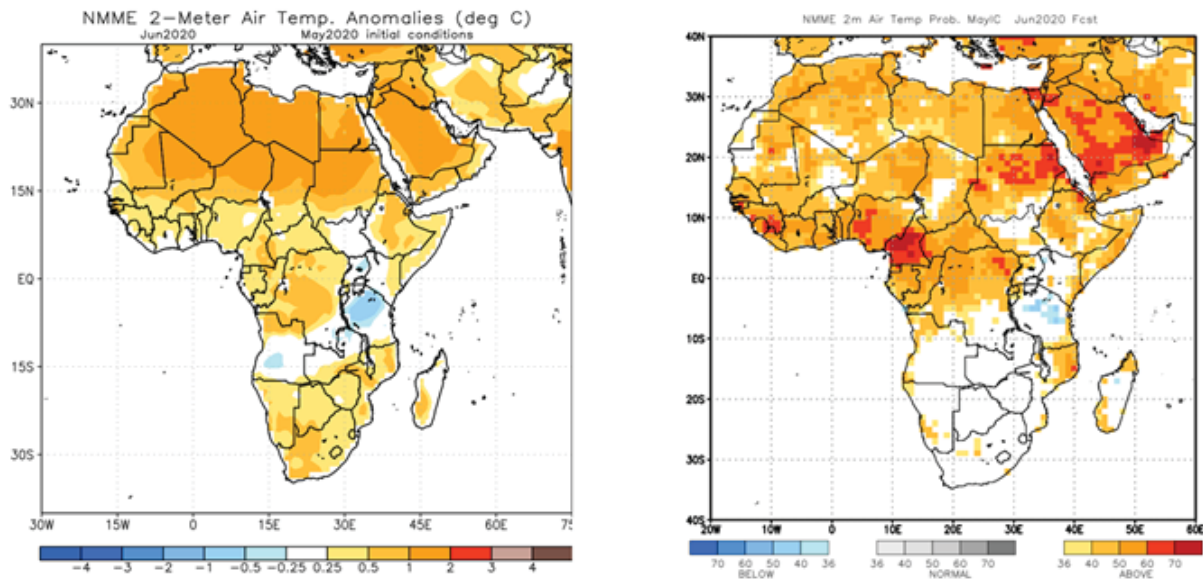


Figure 4: North American Multi Model Ensemble (NMME) temperature forecast for May 2020 based on May 2020 initial conditions

The image on the left shows the probabilistic forecast and the image on the right 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

The SPP for West Africa for the period 01 May to 30 June 2020 indicates that most of the southern parts of the region will experience normal to above normal seasonal rainfall performance (Figures 3 and 5). The conditions are beneficial to the cropping season that is underway. The central parts of the region are expected to experience below normal seasonal rainfall performance while the northern parts are out of season. The NMME temperature forecast models for June 2020 indicate above normal warmer conditions for most parts of the region. The cropping conditions from the Crop Monitor for Early Warning show favourable conditions especially for the southern parts of the region covering Cote d'Ivoire, Ghana, Togo, Nigeria and Mali have favourable cropping conditions (Figure 2). Despite favourable cropping conditions, the region also faces multiple risks that include climate change and variability, persistent insecurity and armed conflict, the COVID-19 pandemic and mitigation measures that have disrupted farming systems across the world. The interaction of the above risks and other factors are likely to contribute to reduced planting areas that will result in reduced seasonal harvests affecting food availability. These risks threaten food and nutrition security across the affected areas in the region. In addition, disruptions to the movement of food from strategic surplus areas to where it is needed further threatens food and nutrition security in the region, particularly in areas already experiencing higher conditions of food insecurity (IPC Phase 2+).

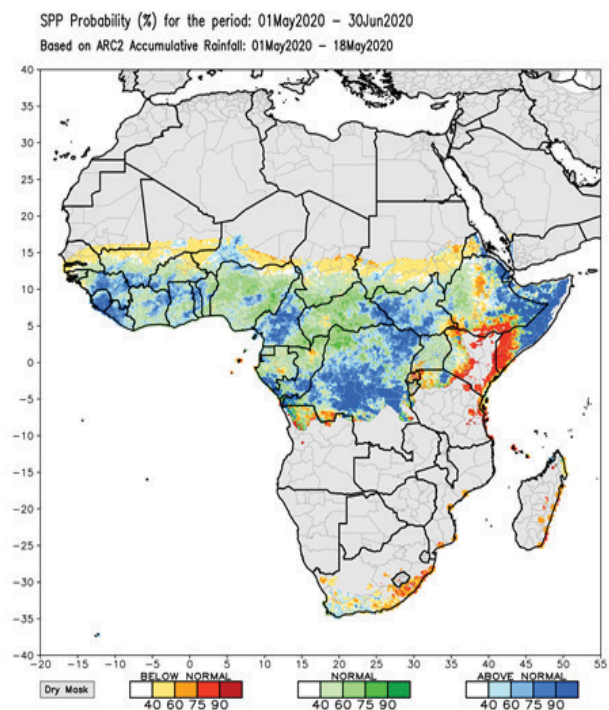


Figure 5: Seasonal Rainfall Performance Probability (SPP) Analysis 01 May 2020 – 30 June 2020

<https://www.cpc.ncep.noaa.gov/products/international/africa/africa.shtml>. Accessed 20 May 2020

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

The desert locust upsurge across parts of East Africa remains a significant threat to cropping activities in the region, particularly in Ethiopia, Kenya and Somalia with small areas affected in Djibouti, Eritrea, South Sudan, Sudan and Uganda (Figure 6). The desert locust situation up-date as of 13 May 2020, indicate that the locusts are expected to migrate towards West Africa. The desert locust situation is compounded by favourable climatic conditions that promoted breeding and development of the second generation. The swarm formation of the second generation in the months of June and July coincide with beginning of harvests in parts of the region (FAO, 2020)⁴. The Gro Intelligence estimates of cropland impacted by desert locust in the affected countries is presented in Figures 7 and 8. The Gro's 2020 Desert Locust Impact Model estimates are based on the comparison of the season's change in NDVI to the historical average change to identify the pixels affected by the desert locust. Among the East African countries, Ethiopia and Sudan have experienced the biggest impact on cropland followed by South Sudan, Kenya, Somalia and Eritrea. The areas in darker green are the most affected and correspond to the areas projected to be under dangerous threat from desert locust in the May to July 2020 forecast (Figure 6). The COVID-19 pandemic and mitigation measures resulted in travel restrictions have affected the timely delivery of pesticides, slowing down desert locust control operations in different parts of the region. The COVID-19 pandemic and mitigation measures to control it have amplified the risks for farming systems in the affected areas. These are expected to have detrimental impacts on food and nutrition security in the affected areas, particularly those already facing high levels of food and nutrition insecurity (IPC Phase 2+) conditions (AGRA, 2020).

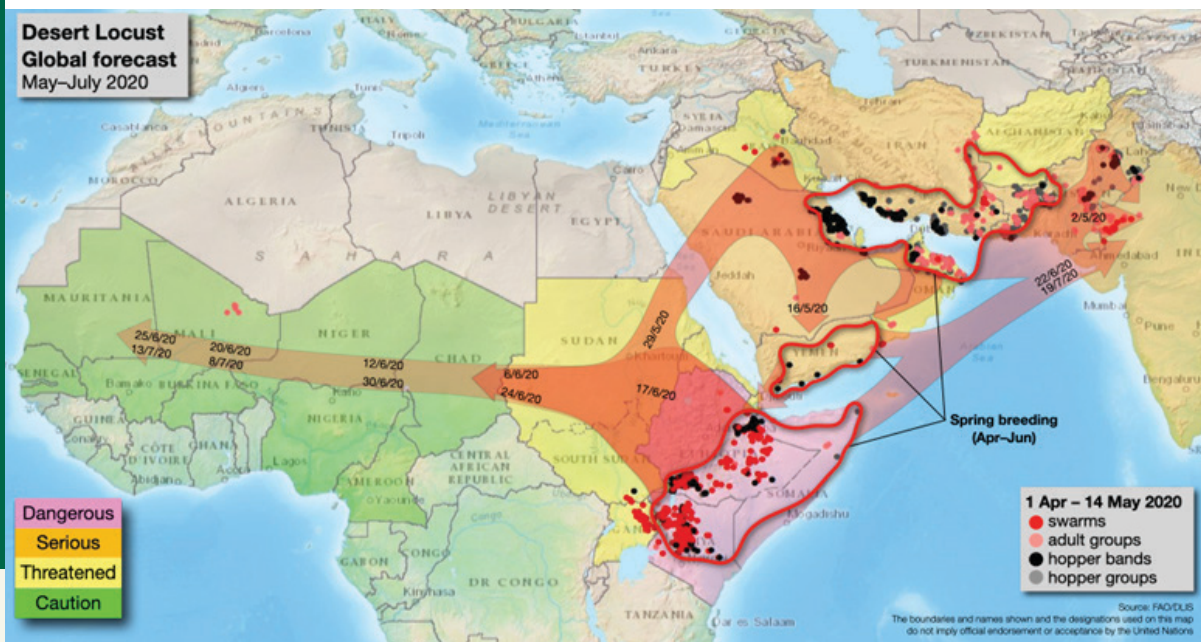


Figure 6: Situation, threat and forecast of desert locust in East Africa

Source: FAO (2020)⁵

⁴FAO (2020). Desert Locust situation update 13 May 2020. Food and Agriculture Organisation of the United Nations, Rome, Italy.

⁵http://www.fao.org/ag/locusts/common/ecg/75/en/200514forecast_globalE.jpg. Accessed 18 May 2020

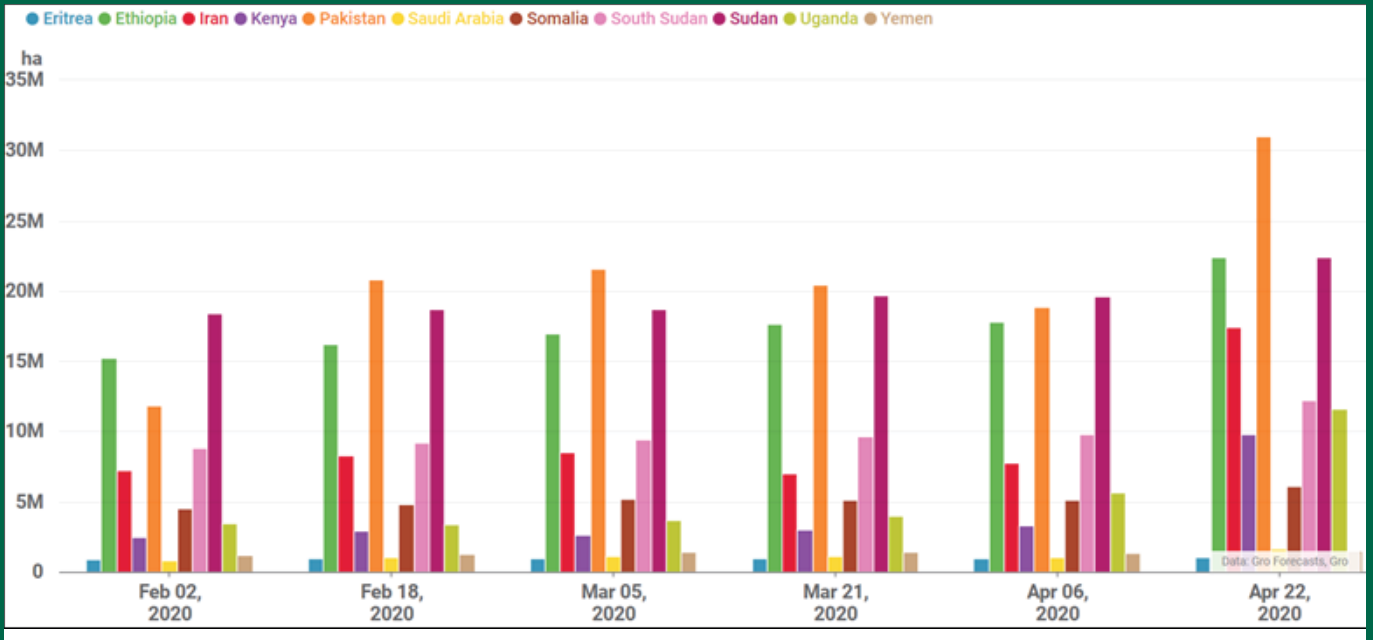


Figure 7: Locust Impacted Cropland Area (Pixel-level Analysis) in East Africa

Source: Gro Intelligence (2020)⁶

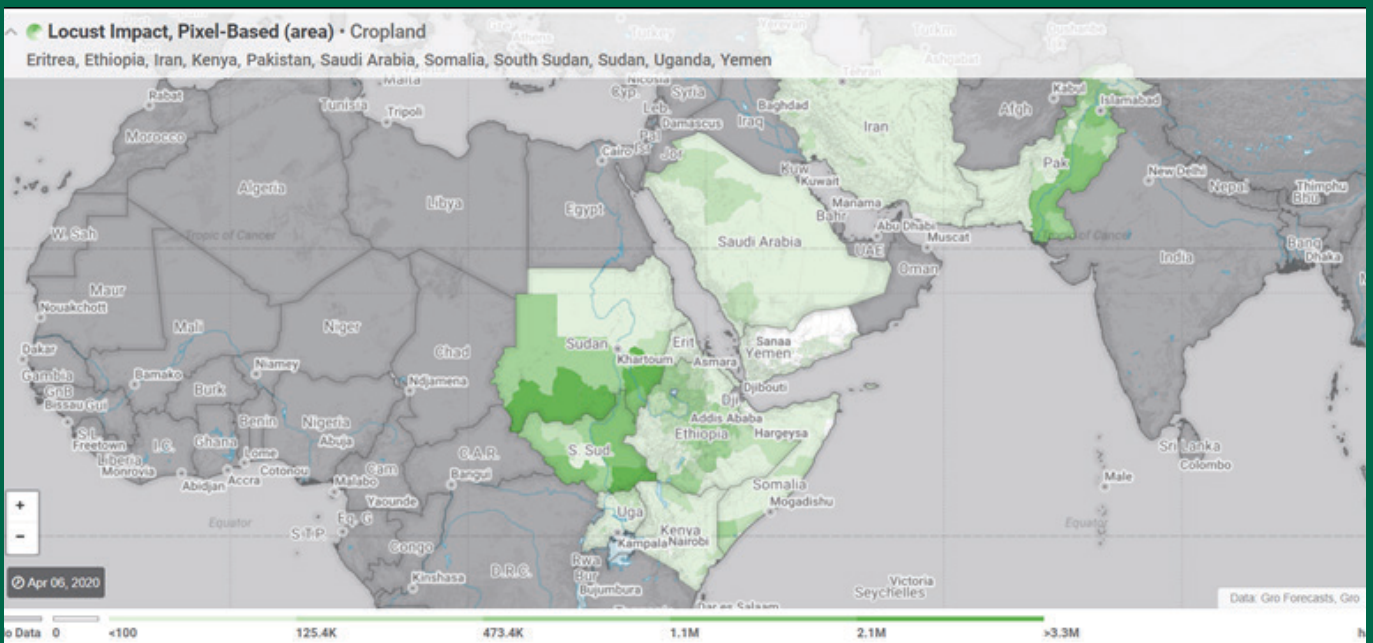


Figure 8: Locust Impacted Cropland Area (Pixel-level Analysis) in East Africa

Source: Gro Intelligence (2020)

⁶ <https://app.gro-intelligence.com/displays/6RwGvXWRW>. Accessed 21 May 2020

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

The coronavirus disease (COVID-19), first detected in Wuhan City, China in late 2019 has continued to steadily increase in many African countries since the first case was detected on the continent in February 2020. As of 26 May 2020, all countries in Africa had reported COVID-19 infections with 119,454 confirmed cases, 3,592 deaths and 48,607 recoveries⁷. Figure 9 presents the summary COVID-19 cases and government measures in African countries as of 14 May 2020. The COVID-19 pandemic has added to the multiple challenges that African food systems are already grappling with, namely climate change and variability (including extreme events like droughts and flooding), rapid urbanisation, food and nutrition insecurity, and the desert locust upsurge (espe-

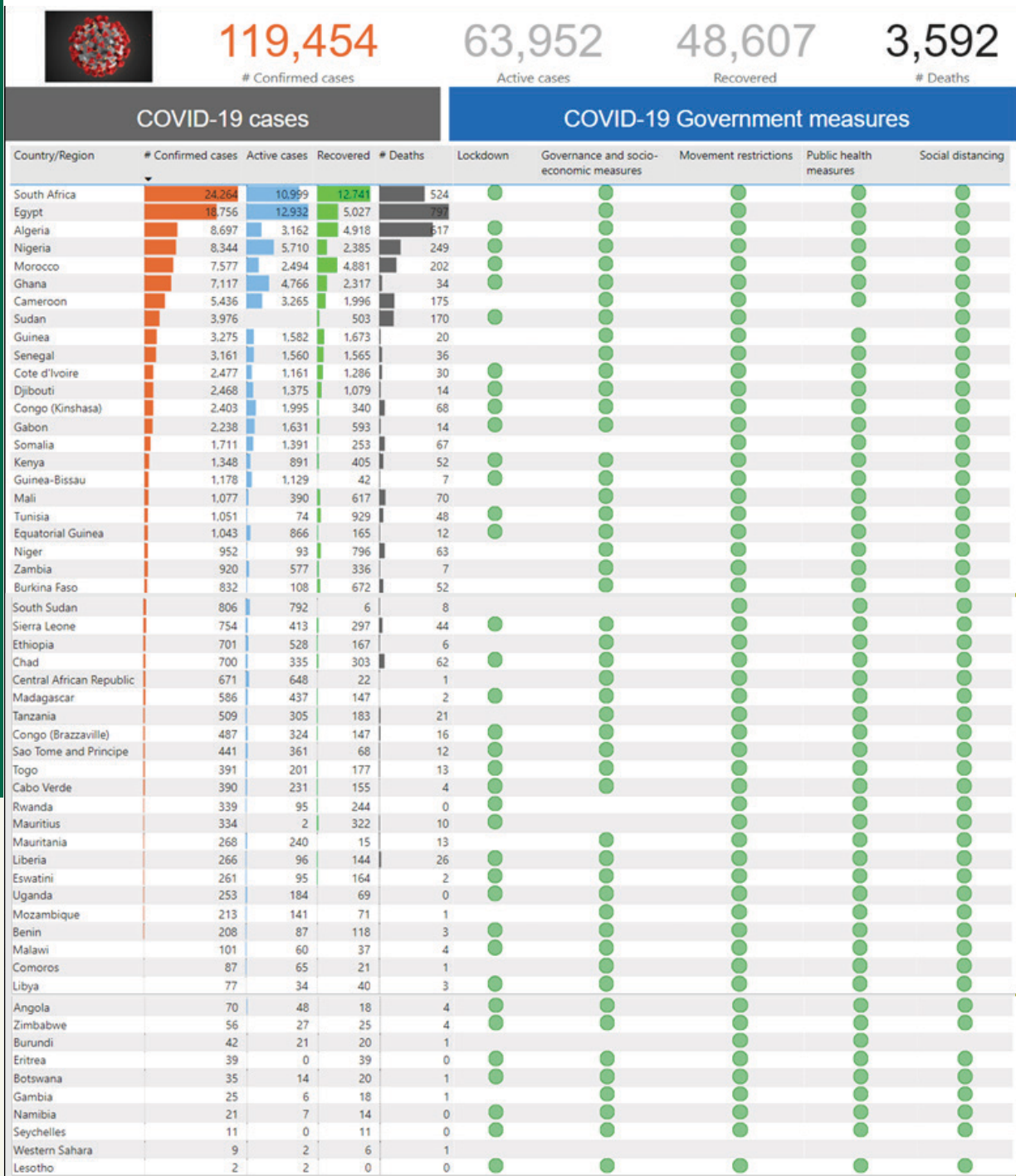


Figure 9: Summary of coronavirus (COVID-19) cases and government measures in African countries

Source: Own construction based on data from Johns Hopkins University⁷

⁷ <https://github.com/CSSEGISandData/COVID-19/>. Accessed 27 May 2020

cially in East Africa). In addition, the COVID-19 pandemic shock and related mitigation measures have triggered disruptions in food systems impacting various stages of food value chains from input supply and production through to food distribution and consumption. Some notable effects of the pandemic and related mitigation measures have been on the availability and accessibility to key factors of agricultural production such as farm labour, seeds, fertilizer and chemicals, particularly in regions that are preparing for their new cropping seasons (in parts of East and West Africa) (AGRA, 2020).⁸ These COVID-19 induced disruptions are expected to result in reduced levels of food production and food availability in some countries across sub-Saharan Africa. This will further have amplified risks in the food systems leading to potential significant negative impacts on food and nutrition security particularly in areas already experiencing Stressed (IPC Phase 2+) conditions of food and nutrition insecurity. The resultant reduced food availability has led to some localized food price increases which have negatively impacted food access, particularly among low income households (UNCTAD, 2020)⁹.

Despite stable supplies in the global cereal markets, COVID-19 induced behavioural changes such as government protectionist/restrictive trade measures (e.g. in strategic surplus regions/countries)^{2,10,11} and panic buying have disrupted supply chains affecting the functioning of food markets. Increasing government bulk food procurement for food security and nutrition support programmes are likely to increase upward pressure on food prices leading to localized food price spikes (WFP, 2020)¹². The upsurge in food demand and logistical disruptions in regional food movement from surplus to deficit regions due to the COVID-19 pandemic are threatening food situation, particularly in food import dependent countries. The UNCTAD (2020) estimates that due to the COVID-19 pandemic shock, global trade values declined by 3% in the first quarter of 2020 and a 27% quarter-on-quarter decline is expected in the second quarter¹³. Overall, the COVID-19 pandemic shock threatens food crises in food deficit areas heavily dependent on markets which could result in food shortages and price spikes. The combined effects of food crises and the pandemic shock will seriously impact on food and nutrition security, especially among the already vulnerable populations in many parts of Africa.



Figure 10: Trucks wait to enter Uganda at the Malaba border, 23 May 2020¹⁴



Figure 11: COVID-19 panic buying in Paarl, South Africa, 23 March 2020¹⁵

⁸ AGRA. 2020. AGRA Food Security Monitor. No 2 April 2020. Alliance for the Green Revolution in Africa, Nairobi, Kenya.

⁹ UNCTAD. 2020. COVID-19 and food security in vulnerable countries. <https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2331>. Accessed 15 May 2020

¹⁰ <https://www.ifpri.org/blog/COVID-19-trade-restrictions-are-worst-possible-response-safeguard-food-security>. Accessed 15 May 2020

¹¹ <https://public.tableau.com/profile/laborde6680#!/vizhome/ExportRestrictionsTracker/FoodExportRestrictionsTracker>. Accessed 15 May 2020.

¹² WFP. 2020. Impact of COVID-19 outbreak on supply chains, regional trade, markets and food security in East Africa, World Food Programme

¹³ UNCTAD. 2020. COVID-19 triggers marked decline in global trade, new data shows. <https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2369>. Accessed 15 May 2020

¹⁴ <https://www.nation.co.ke/news/africa/Uganda-blocks-truckers-with-COVID-19/1066-5562370-6xiyib/index.html>. Accessed 24 May 2020

¹⁵ Wikimedia Commons: <https://commons.wikimedia.org/>. Accessed 14 May 2020

The primary and secondary impacts of the COVID-19 pandemic have resulted in significant livelihood and financial losses for actors along affected supply chains, leading to significant losses of purchasing power and high levels of business insolvency. 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 (AGRA, 2020). Overall, both physical and economic access to nutritionally balanced foods will become increasingly difficult for the poor; disproportionately impacting on women and children in sub-Saharan Africa.

In addition to ensuring that measures for containing the spread of COVID-19 are better coordinated and are informed by market dynamics they should adequately integrate resilience and sustainability of food systems and supply chains during and beyond the pandemic. This includes ensuring food systems and supply chain disruptions are minimized and that adequate support measures are provided to facilitate sustainable operations across the different stages of food supply chains at the local, national and regional levels. The impacts of COVID-19 on different sectors of the economy, including agriculture, requires governments to take deliberate steps to support investments in agriculture to build resilient and productive local food systems, especially targeting the active participation of smallholder farmers. Platforms of state and non-state actors are needed to advocate for increased investments to improve and sustain productivity and resilience in agricultural food value chains.

4.1 Government Interventions and Non-Tariff Barriers impacting on food trade

This section discusses government trade policies and interventions that either restrict or facilitate food trade activities as part of their COVID-19 pandemic response initiatives including non-tariff barriers which have been initiated to ensure national food security outcomes are maintained and improved. With the impact of the COVID-19 pandemic on food systems and food insecurity becoming increasingly evident, most governments across Africa have initiated various food security protectionist measures aimed at maintaining and improving their national food security status. While these measures have contributed to ensuring national food security in some countries, they have been noted to have had distortionary effects on the food trade as they create non-tariff barriers which restrict trade activities.

West African food trade under strain as COVID-19 shuts borders¹⁶

Trade across borders in West Africa, which has long been a challenge due to poor road infrastructure and costly and lengthy policing measures, has recently been worsened by restrictions imposed by governments in response to COVID-19 that is crippling the trade in perishable goods and livestock. In Senegal, border delays and a dusk-to-dawn curfew have seen traders of perishable food commodities suffering huge losses due to food rotting in transit.

This has resulted in significant income losses for these traders who have also reduced the number of deliveries per day due to these restrictions. The closing of the border between Mauritania and Senegal has affected livestock trading between the two countries as animals have not been allowed to cross the border. Data collected by the Permanent Interstate Committee for Drought Control in the Sahel (CILSS) shows West African traders of perishable produce and livestock have seen losses of 10% to 30% since health restrictions came in, as transport is disrupted and markets close while illegal tax collection at checkpoints has leapt nearly 50%.

The COVID-19 pandemic continues to disrupt food supply chains and food trade activities, further threatening food security and incomes among many vulnerable households across the continent. Movement restrictions within and across borders have significantly affected trade activities, especially among informal and small-scale traders, particularly in West Africa where informal cross border trade contributes significantly toward the livelihoods of many low-income households (see example from West Africa in Box). Over the April-May period, the following government interventions and non-tariff barriers were recorded across selected countries in East, South and West Africa.

Ethiopia: The Ethiopian government has placed a tax waiver on imported essential food commodities in the country. The government has issued a call for bids from international companies to import 1.73 million quintals of rice, 3.2 million of quintals of sugar, 18.1 million quintals of wheat and 104.3 million quintals of edible oil free of tax to reduce food shortage problems¹⁷. This move aims to increase food availability in the country and potentially reduce food prices in the

¹⁶ <https://www.reuters.com/article/us-health-coronavirus-food-africa/west-african-food-trade-under-strain-as-covid-19-shuts-borders-idUSKBN2330RV>. Accessed 27 May 2020

¹⁷ <https://www.ifpri.org/project/covid-19-policy-response-cpr-portal>. Accessed 26 May 2020

near term thus increasing food availability among vulnerable households. A second initiative that has been introduced is the removal of the minimum price set by the National Bank of Ethiopia on flower exports. This move will help prevent loss of incomes for flower exporters and reduce potential job losses in the industry at large which may otherwise have serious food security implications for various employees in the value chain.

Kenya: In accordance with the advice by the National Emergency Response Committee on Coronavirus, and the National Security Council, Kenya has imposed a ban on the movement of persons and any passenger ferrying automobiles and vehicles into and out of Kenya through Tanzania and the Kenya-Somalia international border except for cargo vehicles with effect from Saturday 16, May 2020¹⁸. As of 12 May 2020, 25 truck drivers from Tanzania who had tested positive for COVID-19 were denied entry at the Namanga border¹⁹. This move will have serious effects on informal border trade activities between the countries that depend on these activities for both income and food. In addition, the drivers of cargo vehicles entering Kenya are subject to mandatory COVID-19 testing with only those who test negative being permitted to enter the country. While this is important for minimizing the spread of COVID-19, there are potential delays in the transportation of food into and through the country that could potentially arise if this exercise is not conducted efficiently.

In a move that will potentially crowd in private sector players and allow for increased food availability in the country, the Kenyan government, through the Ministry of Agriculture, Livestock, Fisheries and Irrigation, and The Ministry of Industry, Trade and Co-operatives announced on 21 May 2020, that it will no longer engage in the purchasing, distribution, selling and setting of maize prices. This is in addition to the ongoing reforms by the government that have also seen the restructuring of the National Cereals and Produce Board (NCPB) to create a commercially oriented entity, the NCPB Trading Division (NTD) that will compete with other market players based on value and prices.

Mali: Government trade policies initiated in Mali have focused mainly on facilitating trade inflows into the country and restricting the outflow of commodities from the country. The general directorate of customs has imposed an export ban on rice, millet, milk, sugar, oil, pasta and animal feeds and has placed a VAT exemption on milk imports for the next three months²⁰.

Government is also providing public warehouses to increase capacity for essential imported goods. These measures are expected to enable Mali address potential food crises during the pandemic by increasing food availability in the country. However, the export restrictions will affect countries that depend on food imports from Mali.

Uganda: With COVID-19 cases on the increase in Uganda, particularly among truck drivers arriving into the country, the government has initiated mandatory testing for all truck drivers and instructed transport and logistics companies to adopt and implement the new Truck Driver Journey Management System Mobile application for easier monitoring. This will add to the costs of doing business for the transport companies, which may lead to an increase in commodity prices. Recently the government began blocking entry for truck drivers who have tested positive for COVID-19 at various ports of entry into the country. As of 24 May 2020, a total of 206 truck drivers who tested positive for COVID-19 had been denied entry into the country. This move will have serious effects on the country's trade activities and food availability, as trucks carrying essential food commodities are denied entry into the country. At the time of the drafting this report, there was no clear indication of whether or not there were entry exemptions under special circumstances for trucks carrying food products.

Zambia: There have been several reports and complaints on the lengthy and costly customs clearance procedures at the Chirundu and Livingstone border posts in Zambia. According to a complaint filed on the 8 April 2020, on the non-tariff barriers website, truck queues at the Chirundu border post stretched up to 10km into Zimbabwe because of these customs delays²¹. Similar complaints were raised at the Livingstone border post by Coca Cola, who complained that the delays at the border were disrupting their supply chain network despite their goods having been classified as essential services. With Zambia being a key trade passage for food imports from South Africa to countries north of Zambia, these lengthy customs clearance procedures are delaying the movement of essential trade products, including food, which will have severe impacts on the ability of countries to urgently address food crises in their respective countries.

4.2 Government measures to stabilize food systems disrupted by the COVID-19 pandemic

In recognition of the secondary impacts of COVID-19

¹⁸ <http://www.fao.org/in-action/fapda/tool/index.html#main.html> Accessed 28 May 2020

¹⁹ <https://www.the-star.co.ke/news/2020-05-13-25-truck-drivers-denied-entry-to-kenya-after-testing-positive/> Accessed 28 May 2020

²⁰ <https://www.ifpri.org/project/COVID-19-policy-response-cpr-portal> Accessed 26 May 2020

²¹ https://www.tradebarriers.org/active_complaints



Figure 12: Trucks wait to enter Uganda at the Malaba border, 18 May 2020²²



Figure 13: Truck drivers stuck at Livingstone border post on 30 March 2020²³

on food systems and how some of the COVID-19 containment measures have disrupted food production, distribution and availability most governments have initiated COVID-19 response plans to help stabilize national food systems and minimize the impact of the pandemic on their countries' food security. On 27 April 2020, AGRA convened a virtual meeting with Permanent Secretaries in the Ministries of Agriculture in 11 AGRA countries with the objective of discussing and sharing lessons on each country's agriculture and food security response plans and preparedness in relation to COVID-19.

The discussion revealed several food system stabilization strategies focused on ensuring continued food production, distribution, and availability during the pandemic. Most of the stabilization strategies are focused on relaxing restrictions in the agricultural sector by increasing the availability of agricultural labour and ensuring access to critical factors of production such as inputs, extension and advisory services to allow for continued agricultural production. Some of the measures being adopted at the various stages of the value chain include the following:

Input system measures: Measures at this stage focus on ensuring a continued supply of agricultural inputs, particularly in areas that are either preparing for, or going through their planting season. This is effected by allowing input manufactures and distributors to continue their operations during lockdown periods across various countries. Some governments have also introduced input subsidy programmes to enhance access to farmers whose incomes were affected by COVID-19.

Production system measures: At this stage measures focusing on ensuring crop and livestock production activities continue uninterrupted. This is done by allowing farm labourers to continue conducting on-farm activities including planting, crop management (pest and disease controls) and harvesting while adhering to health guidelines to reduce the spread of the pandemic. Information on these guidelines in some countries is channelled through public extension systems where governments have integrated COVID-19 health guidelines.

Post-harvest systems measures: Post-harvest measures focus on reducing food losses from various external factors. This is done in some countries through increasing post-harvest storage infrastructure.

Processing system measures: These measures focus on enhancing the processing capacity of agro-processing and ensuring continued processing activities by maintaining the flow of essential raw materials and produce from farmers to processors. In some cases, governments are enhancing processing infrastructure to allow export-oriented commodities that have been affected by the pandemic to be processed locally.

Food distribution and trade measures: These measures focus on ensuring food distribution activities within and across borders continue uninterrupted within the stipulated health guidelines. This is achieved by allowing transport and logistics companies to continue moving food commodities and other agricultural products across borders.

²² <https://www.nation.co.ke/news/africa/Covid-19-Uganda-to-test-all-truck-drivers/1066-5556248-2dwhttz/index.html>. Accessed 24 May 2020

²³ <https://www.tralac.org/blog/article/14502-coronavirus-and-freight-forwarding-in-sadc.html> / Accessed 28 May 2020

The following sections illustrate various stabilization measures across selected countries in East, South and West Africa

Figure 14: Food systems stabilization measures by selected countries in East Africa²⁴

Rwanda

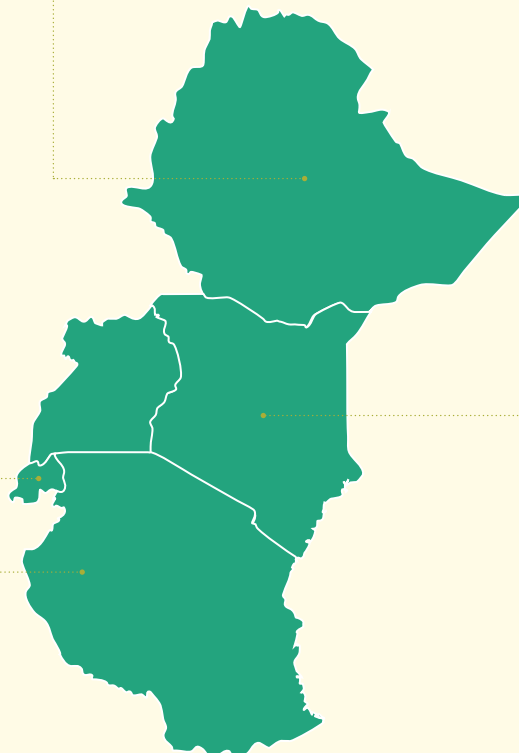
- The Ministry of Agriculture and Animal Resources (MINAGRI) developed guidelines to avoid food shortage in the country, and enable farmers to continue farming but also keeping safe in line with advice from the Ministry of Health. The guidelines focus on the following objectives:
- Ensure that there is no disruption in the animal feed supply chains which have been included as an essential service.
- Ensure availability of fertilizer and seeds by requesting retail shops, distributors and importers of fertilizers and seeds to continue production while the ministry facilitates permits to allow for movement of trucks moving seeds, fertilizers and other agro-chemicals.
- Measures to continue with harvesting and collection of last farming season crop which ended in March, post-harvest and handling to minimize shortage of food in the market.
- Facilitate movement of agricultural workers with the knowledge of security agencies and other agencies to enable them to move and support the production, processing and distribution of food.
- Sensitize and inform farmers on how to cope with COVID-19, how to keep safe, and ensure there is no shortage of food in the market or in storage.

Tanzania

- Strengthening extension system to enhance productivity
- Strengthen mechanization to address the labour shortage as lockdown may persist.
- Food crop monitoring to aid yield prediction
- Food movement continues internally
- Horticulture exports are permitted with exports of up to 3 times a week to Europe through a partnership with Ethiopian airlines.

Ethiopia

- Improving agricultural input distribution by increasing transport and logistics efficiency and addressing labor shortage in input distribution supply chain.
- Enhancing extension services
- Ensuring availability of veterinary services
- Putting in place various measures to respond to desert locust control.
- Focusing on agricultural commodity supply
- Rural safety net programs
- Promoting women and youth employment programs



Kenya

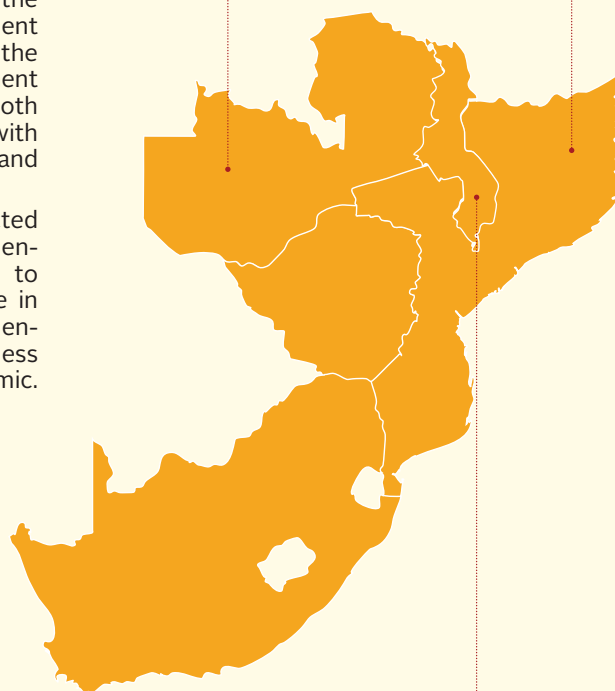
- The Kenyan Food Security War Room identified 8 key interventions in its COVID-19 Response Plan namely:
- Maintaining flow of produce from production to markets
- Ensure minimal disruption to markets and access of population to food and water
- Managing price hikes
- Maintaining sufficient food stocks
- Maintaining support of inputs and extension systems
- Support farmers in mitigating the impact of the locust invasion.
- Support on-going operations of large farms and processing
- Limit disruptions to export market access
- The Central Government in collaboration with the Counties is monitoring the market on a daily basis by tracking the prices of commodities to ensure there is no price hike and to ensure that market information is shared.
- Government has created a food security committee at the county level which collects data enabling counties share information more quickly where there are challenges.
- At the regional level, there is a commitment to keep the borders open albeit with some restrictions to contain disease and minimize cross-border spread.
- Government is addressing the locust issue with the support of FAO, and has declared locust control as an essential service.
- Government is also implementing the ASTGS and envisions that the war room will transit into the Agriculture Transformation Office so that the issues in the strategies can be implemented uninterrupted, including proposing a risk management plan and unit to ensure that investments are not lost.

²⁴ Source: AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 27 April 2020

Figure 15: Food systems stabilization measures by selected countries in Southern Africa²⁵

Zambia

- The Government of Zambia has articulated strategies to respond to the emergency outbreak in its National COVID-19 Contingency and Response Plan. Among others, the pillars include the continued supply of food and other essential goods
- Government has also initiated agricultural policy actions focused on ensuring input distribution.
- The Minister of Agriculture and the Minister of National Development are planning to collaborate with the private sector and development partners to grow food for both domestic and export markets with government providing financial and logistical support.
- Government has also instructed the Ministry of Agriculture to encourage and support farmers to grow winter maize and engage in other agricultural activities to ensure the creation of new business opportunities during the pandemic.



Mozambique

The country has put in place a response plan that is focused on ensuring:

- Food availability and access which involves the implementation of the government price purchase program by region for specific agricultural products in order to patronize local producers.
- Employability for rural development
- Allowance for workers in the agricultural sector
- Purchase of surplus of local certified seeds and distribution across the regions.
- Subsidized credit lines for the various players in the productive sectors of the agricultural value chain.

Malawi

- Government has developed a National Coronavirus Disease (COVID-19) Response Plan for 3 months – estimated at US\$ 213 million working under 10 operational clusters including food security (led by disaster management ministry).
- There are 10 operational clusters in the plan. Agriculture Cluster was initial-

ly not included because the technical team did not initially envisage impacts in the agriculture sector.

- Government has also planned interventions limited to the provision of life-saving food assistance to food insecure urban, semi-urban and rural households affected by the impact of COVID-19 at a cost of 22.3million USD.
- The Ministry has prepared an outline

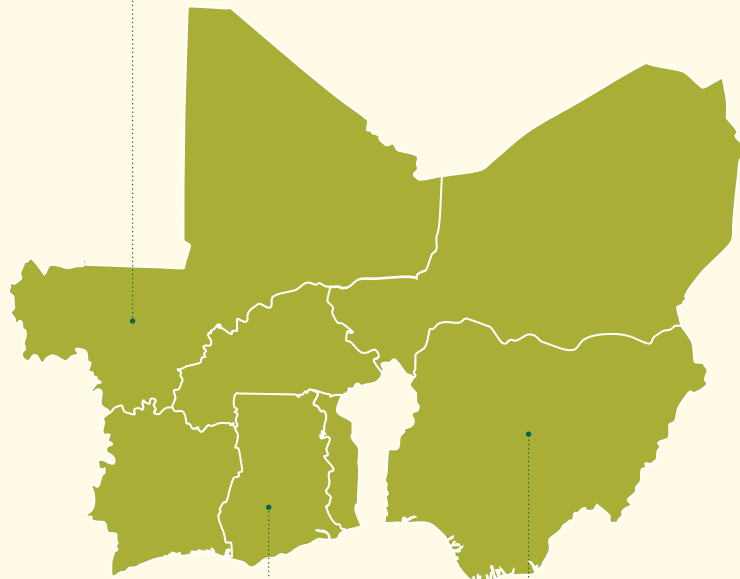
of the impacts of the COVID-19 and the related management measures in the agriculture sector as well as the proposed response actions with the associated cost. Once the request to include the agriculture sector response interventions is accepted, the budget will be adopted to form part of the National Response Plan to help with resource mobilization.

²⁵ Source: AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 27 April 2020

Figure 16: Food systems stabilization measures by selected countries in West Africa²⁶

Mali

- Cash transfer program supported by World Bank
- Government has set aside a US\$ 7.7 million fund for fertilizer and equipment subsidies.
- Fertilizer distribution efforts have begun with fertilizer for cotton farmers already secured in various warehouses in the cotton producing regions.
- Government has also identified suppliers to procure fertilizer needed for rice.
- Government plans to distribute 56,000MT of food against an available stock of 27,000MT with initial intervention of 2,000 tons of rice targeting 200 rural communities.



Nigeria

- The government, under the Economic Sustainability Plan is focusing on agriculture as the key driver of responses with a plan for input supply to farmers in the planting season.
- The government is committing resources to subsidize input supply and ensure the farmers get the right inputs in the right time.
- Nigeria has a comprehensive Response Plan led by the President and Vice President to mitigate the unintended consequences on food supply chains and agriculture by ensuring that input distribution and access among farmers is sustained.
- The government has also put in place mechanisms for the movement of food, livestock and inputs with the Ministers of Agriculture working closely with the National Security Adviser.

Ghana

The Ghanaian government has taken the following measures to stabilize the country's food systems and minimize the effects of COVID-19 on food security in the country:

- Continued agricultural production support through the flagship program - Planting for Food and Jobs (PFJ) Program
- Ensuring that farmers have access to inputs, particularly seeds and fertilizers through subsidies to help sustain production.
- Livestock side-rearing for food and jobs, distributing two breeds to farmers across the country.
- Strengthening extension systems and sensitizing farmers on the COVID-19 situation and how to continue production without disruption.
- Mobilizing strategic stock storage by increasing storage facilities across the countries from 30,000 to 80,000.
- To minimize the potential impact of COVID-19 on export commodities, government is organizing producers to explore local markets and processing of products to increase opportunities for growing the market.
- Issuing permits to all the agricultural actors to allow free movement and ensure food availability

²⁶ Source: AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 27 April 2020

5. AGRICULTURAL COMMODITIES AND FOOD PRICE MONITORING

5.1 East Africa

Commodity prices in East Africa varied over the past month, but remained generally high compared to prices recorded over the same period during the previous year. The disruption of marketing and trade activities and panic-buying related to the COVID-19 pandemic which persisted in some countries, contributed to price increases recorded across selected areas in the region over the past month. Price declines were due to various factors namely increased food availability from seasonal harvests as well as relaxed COVID-19 measures in some countries which allowed for food distribution activities to continue.

Ethiopia: Prices of major grains continued to increase over the April to May period, remaining higher than prices recorded over the same period in the previous year. This price movement was due to the continuous depreciation of the country's currency, resulting in increased transport and production costs²⁷. Reduced food availability at the country's major markets due to COVID-19 containment measures has also contributed towards the upward price trends. Price increases are expected to continue for all the major grain commodities over the next three months.

Kenya: Commodity prices are stabilizing to the prices held at the end of March. Maize flour prices are expected to decrease as more farmers sell their stocks, given the recent import gazettement. Increases in the price of rice are most likely due to price hikes in Asia²⁸. Food shortages due to locust infestations and post harvest losses due to the recent floods continue to drive price increases in some areas of the country.

Rwanda: Maize prices remained stable in April after declining in the past three months following the main season harvest, but remained higher than prices over the same period in the previous year. Bean prices are expected to decline over the June to July period before climbing up again into August, while maize prices will generally decline in the next three months.

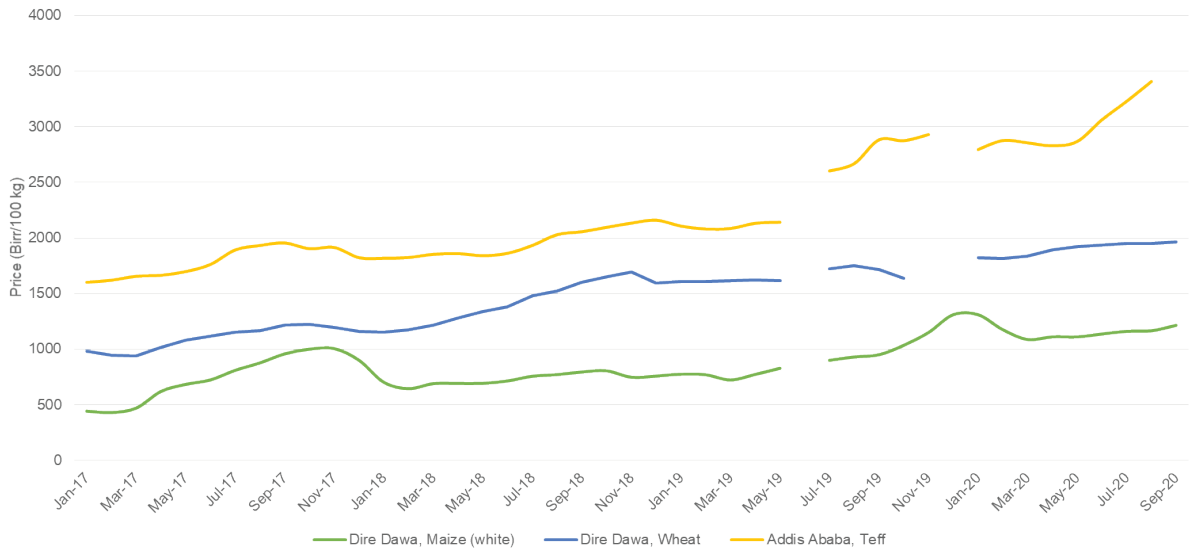
Tanzania: Maize prices declined in May across the country's major markets following the country's March to April harvest, but remained significantly higher than prices from the previous year. This downward trend is expected to continue for the next three months. Bean prices remained stable but are expected to decline from June through to September, remaining significantly higher in Dar es Salaam compared to markets in Arusha and Dodoma.

Uganda: Maize prices continued to decrease in May, having temporarily increased in April. The prices are expected to fluctuate on a monthly basis going forward, decreasing in June before increasing in July through to September. Beans prices also increased over the April to May period and this is expected to continue until the end of June before increasing temporarily in July. Price spikes are sustained by seasonal pressure compounded by panic buying and market disruptions following the implementation of lockdown measures to limit the spread of the pandemic. Demand from the Government for its distribution programmes also provided upward pressure.

²⁷ <http://www.fao.org/giews/food-prices/regional-roundups/detail/en/c/1275186/>. Accessed 24 May 2020

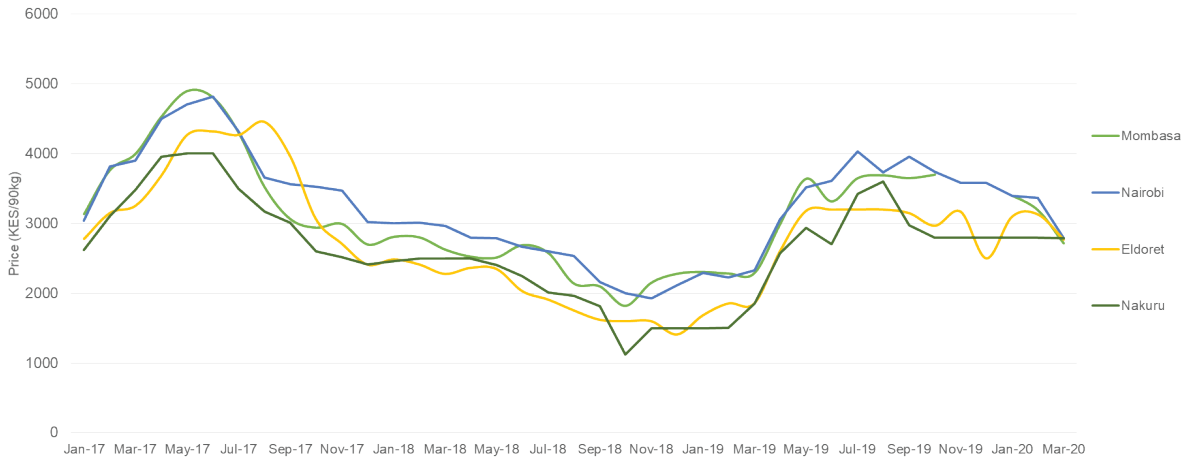
²⁸ Food Security War Room: Food Security Update 07 May 2020

Wholesale prices of food crops in selected markets in Ethiopia



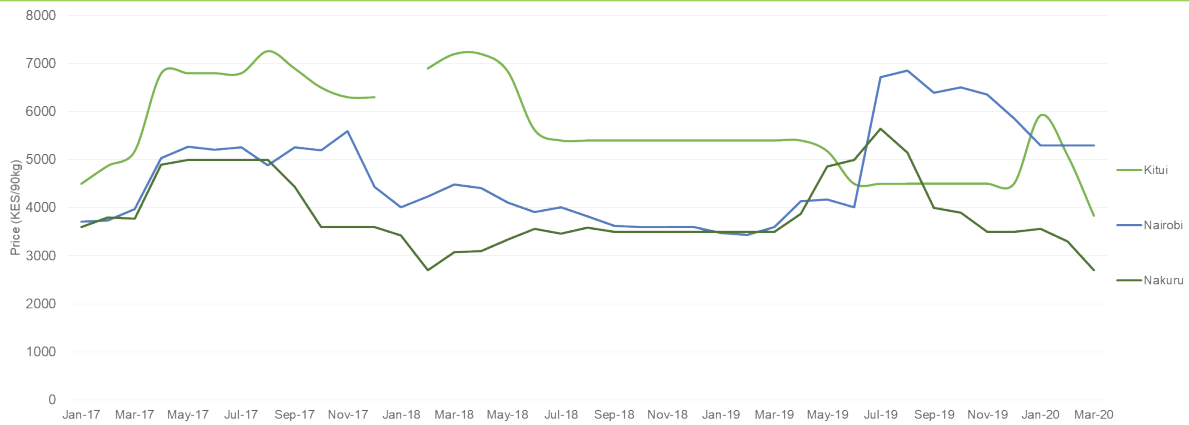
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

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



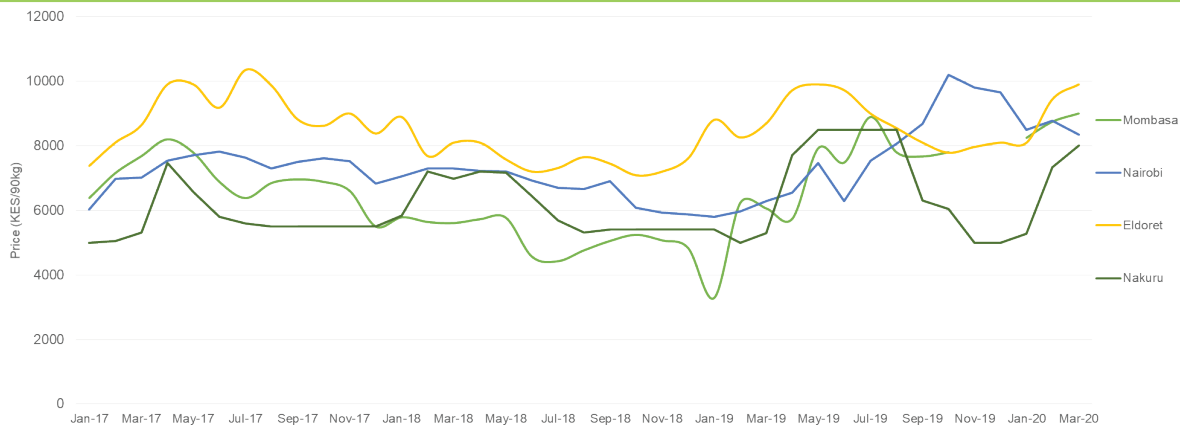
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

Wholesale prices of sorghum in selected markets in Kenya



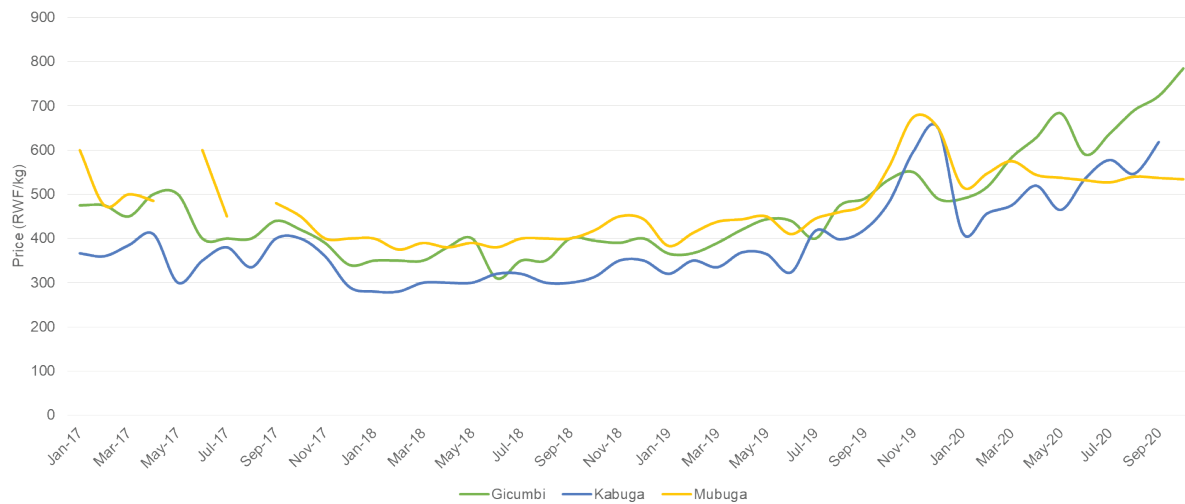
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

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



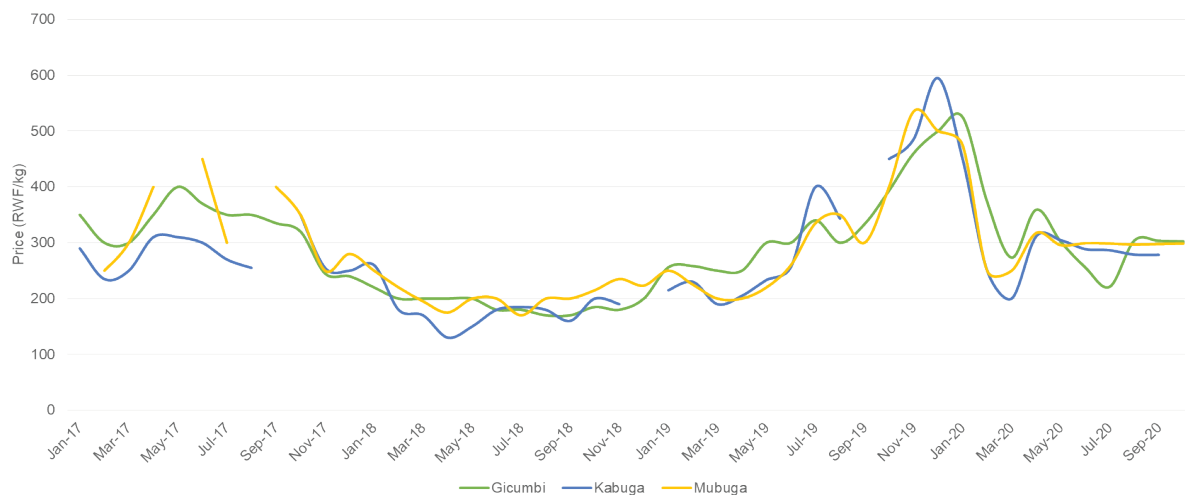
Source: Authors' construction based on data from Ministry of Agriculture and WFP (2020)

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



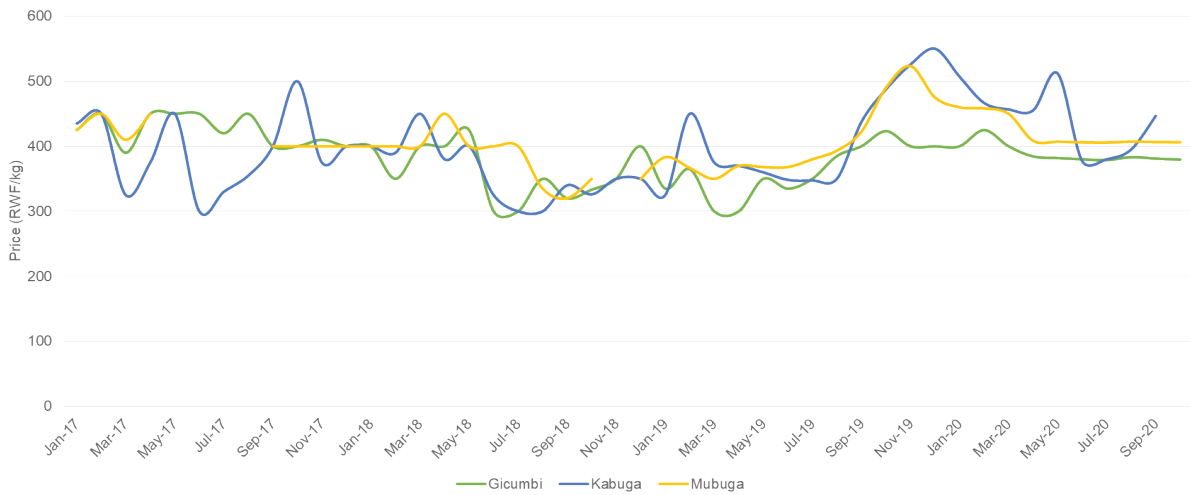
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of maize in selected markets in Rwanda



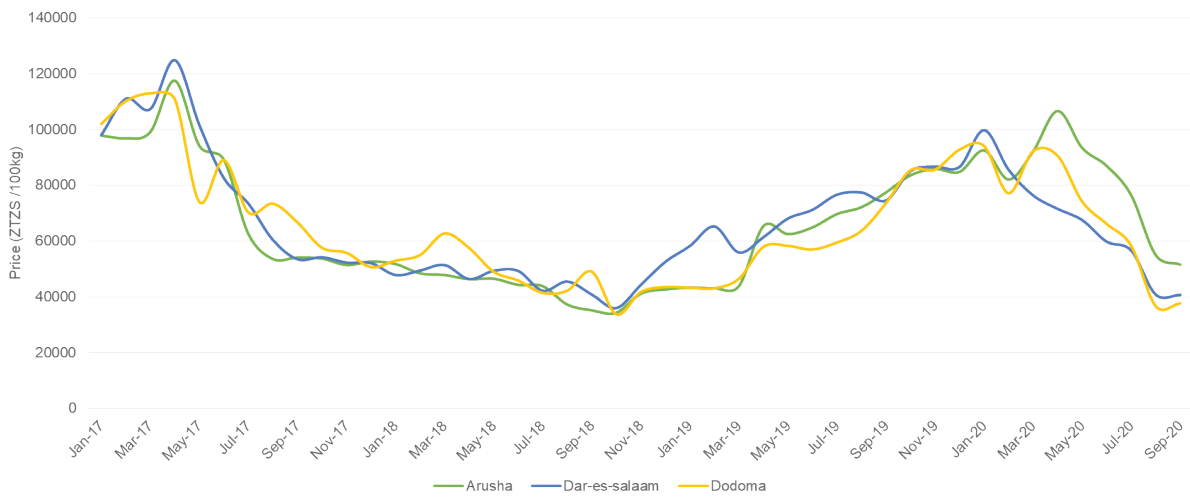
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of sorghum in selected markets in Rwanda



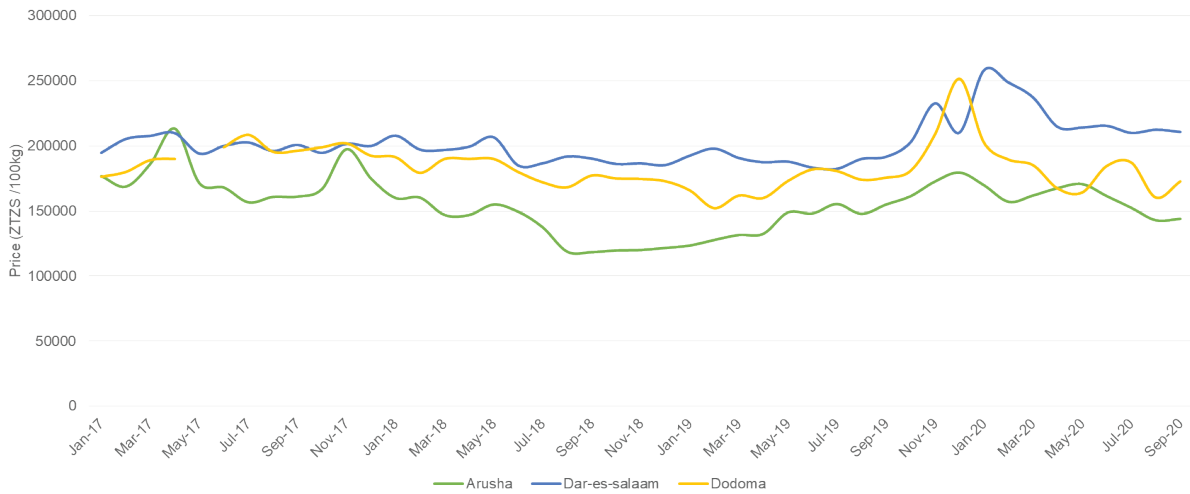
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

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

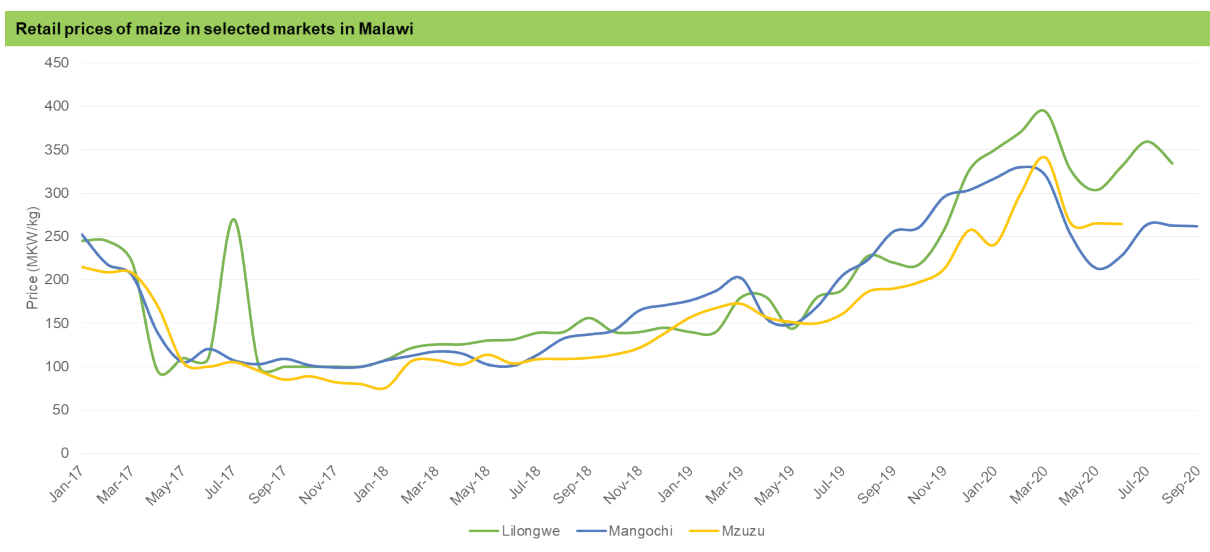
5.2 Southern Africa

The start of the main harvest season has seen an increase in food availability, contributing to a general price decline across Southern Africa although prices remain above the previous year's prices sustained by below average harvests in the previous seasons. The secondary impact of COVID-19, which continues to restrict food distribution activities with isolated cases of panic buying, is contributing to price hikes in some areas. The sections below detail how these prices moved across the major grain commodities in selected Southern African countries in the April to May period.

Malawi: Maize prices declined over the April to May period but remained significantly higher than the previous year's prices. Increased stocks from the main harvest and stock releases from traders in anticipation of the main harvest contributed to price decreases during this period. However, the average retail price of maize grain was below the Government-set farmgate price of MWK 200 per kg, a floor price for farmers to sell their produce²⁹.

Mozambique: Maize prices declined in May after being stable in the previous three months following increased market availabilities from stock releases from traders and increased supply from the country's harvest. Temporary price hikes were recorded in April due to panic buying following COVID-19 containment measure announcements. However, the stable price trend is expected to continue over the next three months.

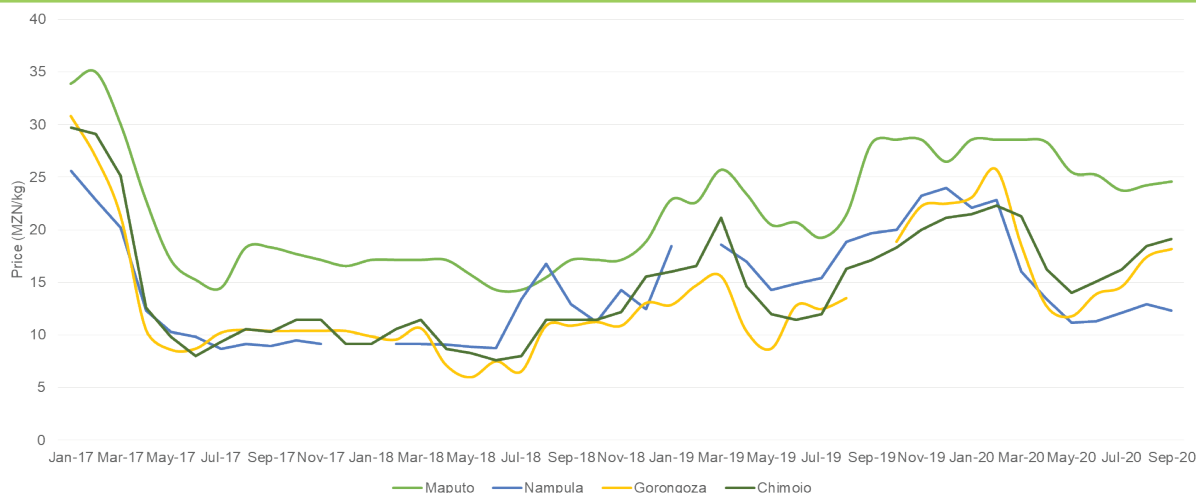
Zambia: Maize prices increased over the April to May period, remaining significantly higher than the previous year's levels despite the country having gone through its major harvest. This was sustained by the impact of two successive years of below average harvests in the country and a weaker local currency. This upward price trend is expected to remain sustainable over the next three months with prices remaining significantly higher in Lusaka compared to other markets.



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

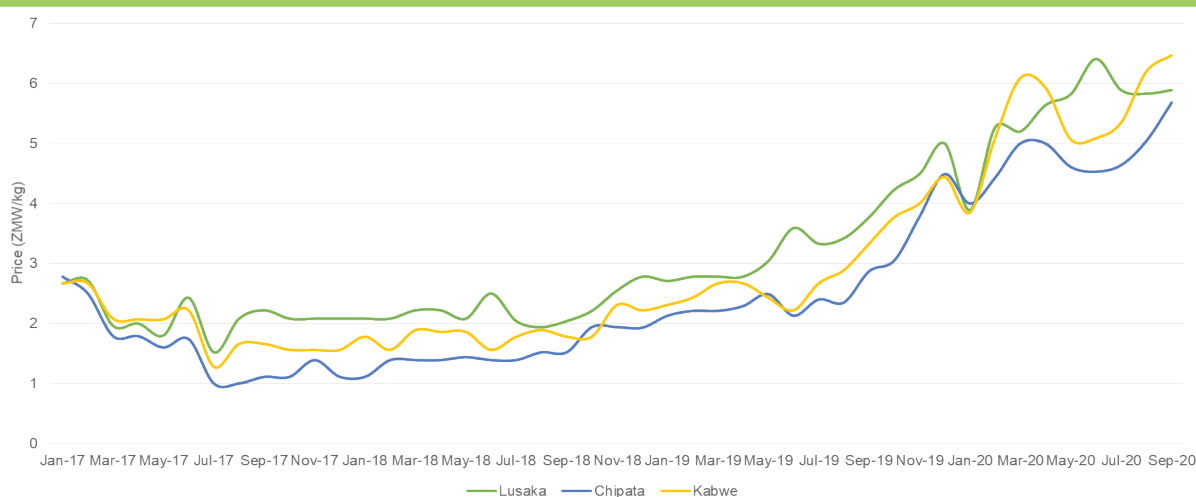
²⁹ <http://www.fao.org/giews/country-analysis/country-briefs/country.jsp?lang=en&code=MWI>

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

Retail prices of maize in selected markets in Zambia



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

5.3 West Africa

The price of grains remained stable with some increases in the conflict-affected areas over the past month. Market activities and trade flow disruptions continued in some areas due to persisting civil insecurity and COVID-19 pandemic containment measures. Reduced food stocks also contributed to price increases across the region with panic buying further worsening the situation. Overall, market demand remained below average, despite recent panic purchases related to COVID-19 and in preparation for Ramadan. Cross-border flows reduced substantially as movement restrictions persisted. Price movements across selected West African countries are described in the sections below.

Burkina Faso: Rice, sorghum and millet prices generally remained stable over the April to May period. However, in some localized areas of the country affected by persistent insecurity and armed conflict, marketing activities and food distribution activities were affected resulting in price increases. Over the next three months, mixed price trends are expected with rice prices projected to increase from August, and sorghum prices projected to remain stable. Price trends are also expected to vary across different markets in the country with prices in Ouagadougou (Sankaryare) expected to decrease for millet and sorghum while increasing in other markets.

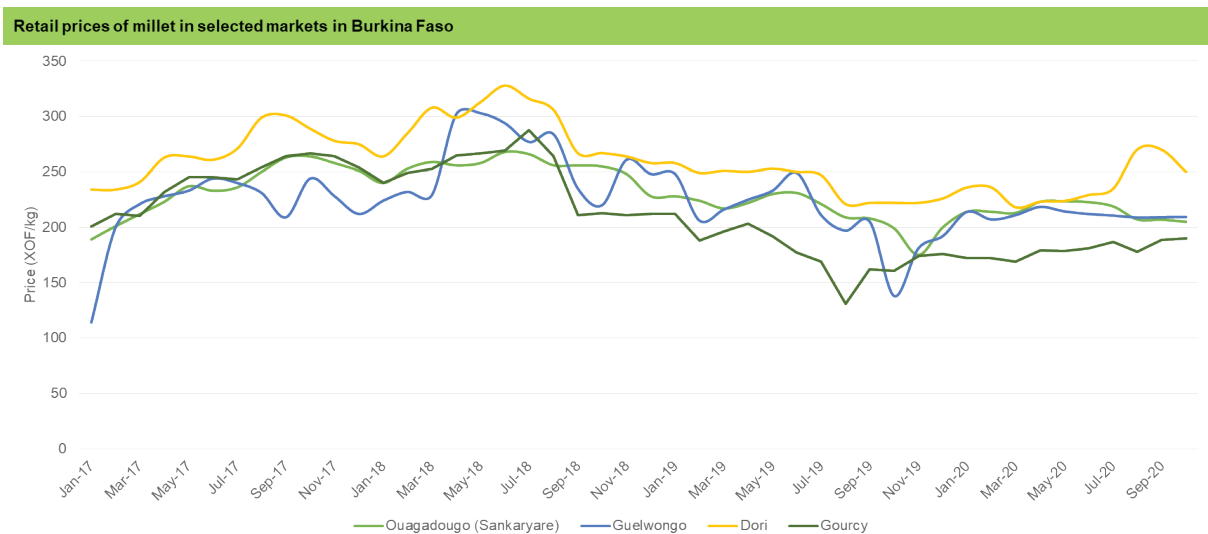
Cote d'Ivoire: Maize prices declined over the April to May period, remaining lower than prices over the same period in the previous year. Rice prices generally remained stable, with this trend expected to continue for the next three months. Plantain prices declined temporarily but are projected to increase from June with the upward trend expected to continue for the next three months. Cassava prices decreased, with the downward price trend expected to continue for the next three months.

Ghana: Maize prices generally increased across the different markets over the April to May period, except for Bolga market where prices remained stable after declining in March. The general upward trend is expected to remain for the next three months with prices expected to drop sharply in Techiman in September. Cassava prices were generally stable across most major markets increasing marginally. This trend of stable prices is expected to continue for the next three months.

Mali: Maize and rice prices increased over the April to May period with this upward trend expected to continue over the next three months. Millet and sorghum prices remained stable with this trend also expected to continue for the next three months. Persistent conflicts in localized areas continue to constrain food distribution and marketing activities, and contribute towards price increases in the affected areas.

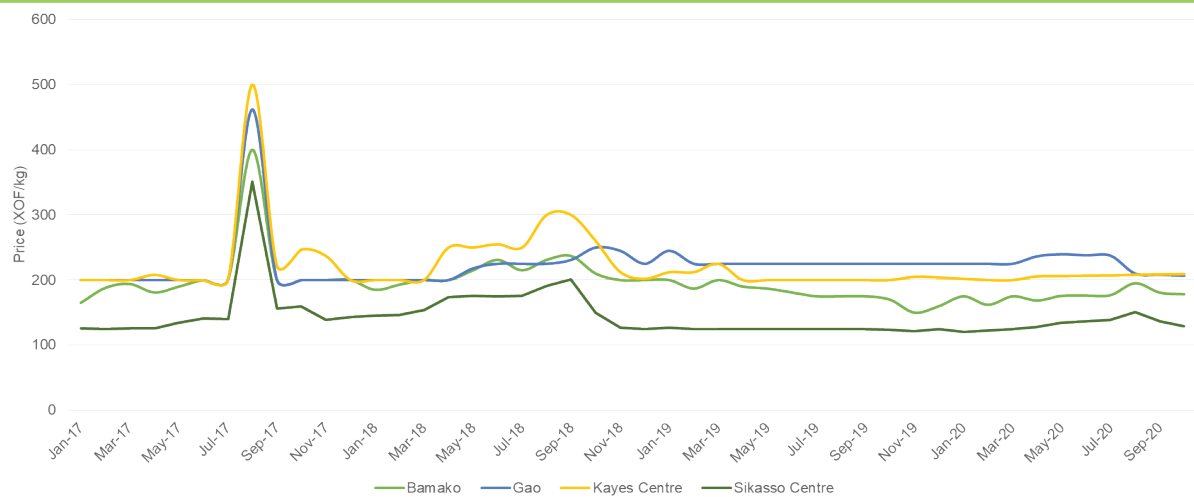
Niger: Rice prices were mixed across various markets over the April to May period across the different markets. In Katakou, prices declined whilst remaining generally stable in Tillaberi Commune, Kzoe and Dan Issa. This price trend is expected to remain stable for the next three months. Sorghum prices were stable in Katakou and Dosso markets but declined in Agadez and Maradi Commune markets. This trend is also expected to persist for the next three months. Millet prices increased in most markets except for Katakou where they declined.

Nigeria: Maize and millet prices remained generally stable over the April to May period and are projected to decrease over the next couple of months. Sorghum prices have also been on a downward trend with this trend expected to continue over the next couple of months. Rice prices increased over the past month with this upward trend expected to continue over the next couple of months.



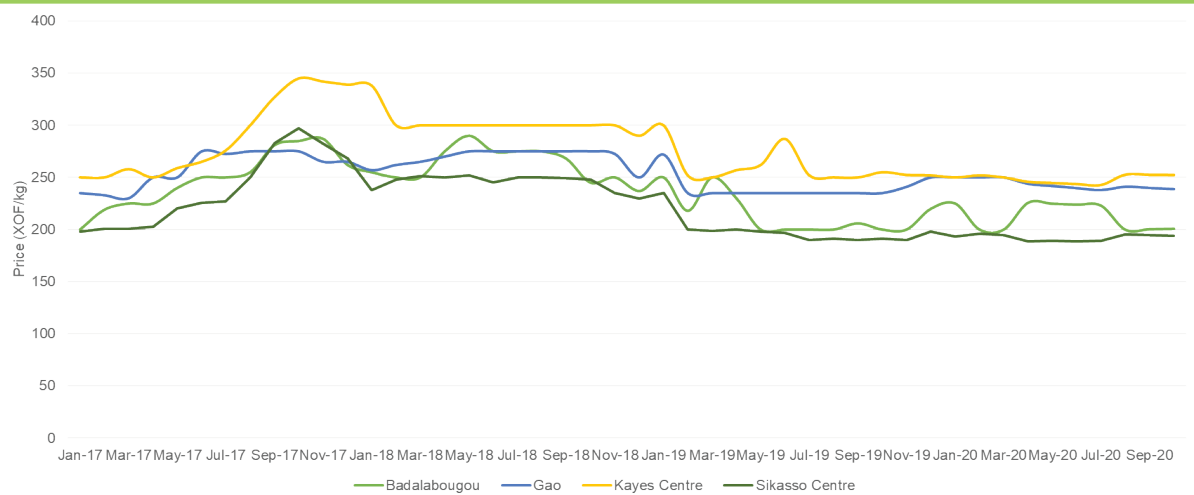
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of maize in selected markets in Mali



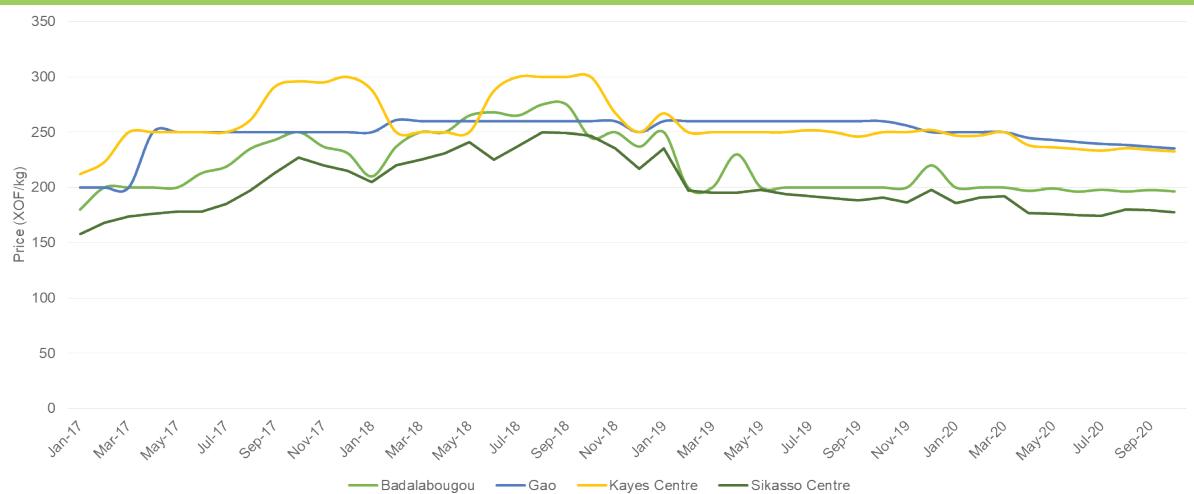
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of millet in selected markets in Mali



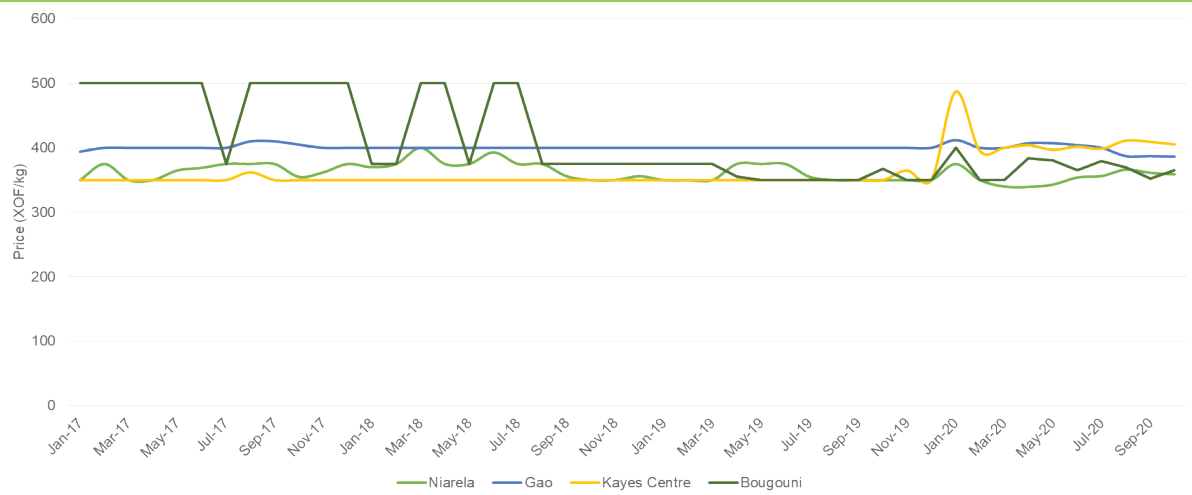
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

Retail prices of sorghum in selected markets in Mali



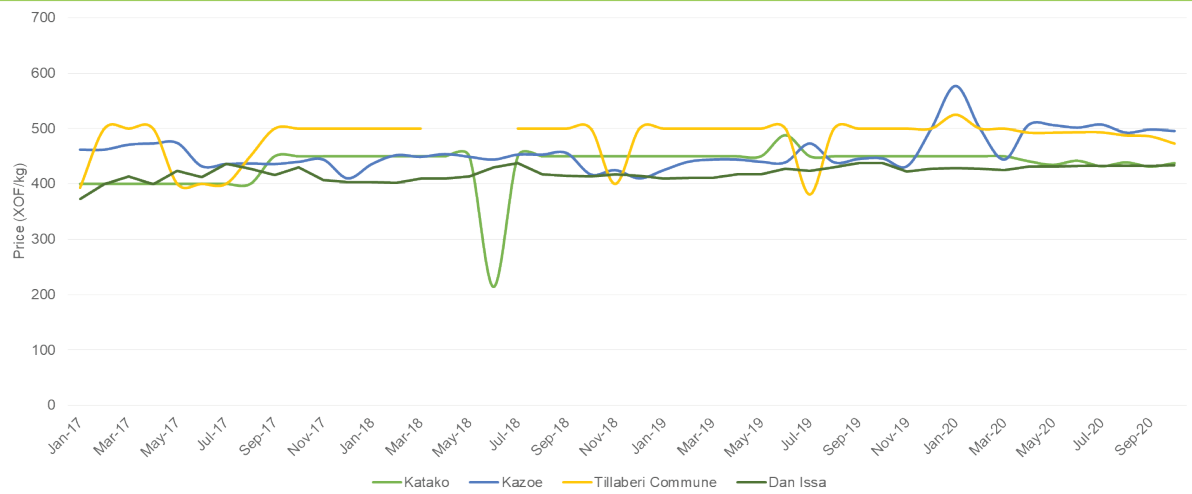
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

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



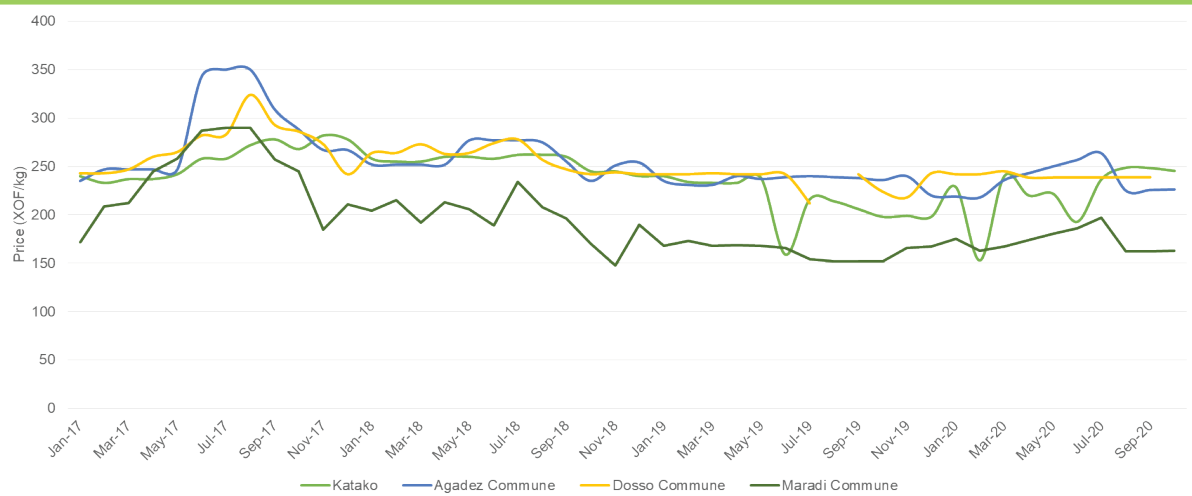
Source: Authors' construction based on data from WFP (2020). *Price projections from last observed price

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



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

Retail prices of sorghum in selected markets in Niger



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

6. FOOD SECURITY OUTLOOK

6.1 East Africa

The East Africa region's food security outlook for March to May 2020 period presented in Figure 17 below shows the region is experiencing an IPC v3.0 Acute Food Insecurity Phase. The food security situation has been worsened by the COVID-19 pandemic and desert locust infestations that have reduced food distribution efforts and led to significant food losses across selected countries in the region respectively. The COVID-19 induced measures, which include lockdowns and border closures, continue to restrict the flow of essential food commodities into the region, particularly into countries that are highly dependent on food imports. The continued loss of incomes among low income households due to COVID-19 containment measures has also limited food access. Desert locusts continue to pose significant threats to the region's food security as crop and pasture losses persist, particularly in Ethiopia, Kenya, and Somalia. In other countries, such as Kenya, the excess rainfall recorded over the past months has led to significant post-harvest food losses with the country's Strategic Grain Reserve Chief reporting that the country recorded between 30% to 35% post-harvest losses due to the excess rainfall³⁰. Due to low food reserves, heavy rains and the ongoing desert locust invasion, Kenya is likely to face food shortages this year. Consequently, an increased demand for food imports combined with supply chain delays is likely to lead to

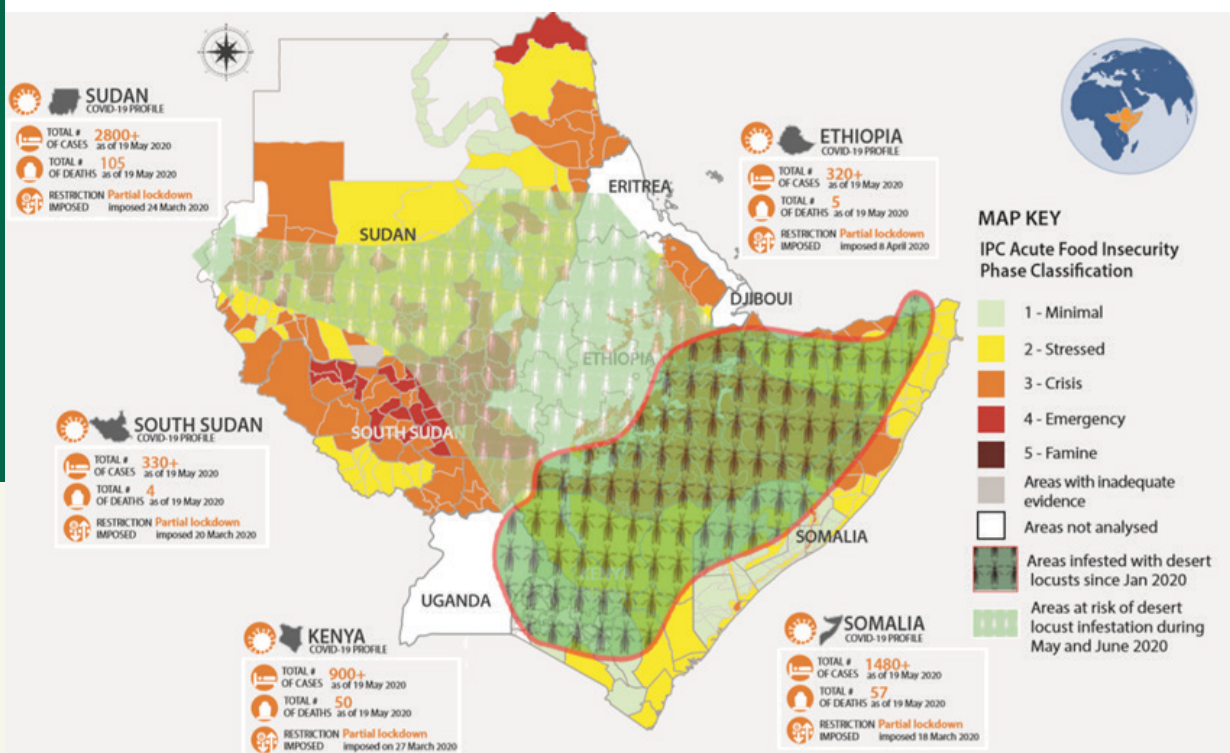


Figure 17: East and Horn of Africa Food Insecurity in the context of Desert Locusts and COVID-19 as of 19 May 2020³¹

³⁰ <https://www.pd.co.ke/news/national/maize-reserve-stores-empty-says-strategic-food-reserve-29992/>. Accessed 28 May 2020

³¹ <http://www.ipcinfo.org/ipcinfo-website/ipc-alerts/issue-22/en/>. Accessed 27 May 2020

food price inflation in the country. With most countries in the region currently preparing for the planting season, ensuring uninterrupted access to agricultural inputs and the availability of labour is essential to increasing food production and availability in the next couple of months. Reducing restrictions on locust control, and reducing post-harvest losses as the region approaches its main rainfall season are key to ensuring food availability across the region.

The following sections assess the food security situation in selected East African countries from a food production and food stocks perspective.

Ethiopia: Maize stocks increased marginally by 0.37% in May, with the country closing the month with 806,000MT of maize. Domestic maize consumption levels matched local production at 86,000 MT during this period. Millet consumption levels also matched production levels at 1,100,000MT as the country opened and closed the month with not millet stocks. Sorghum stocks decreased with consumption levels exceeding production levels by 100,000MT indicating a deficit during this period. Rice consumption levels were significantly higher than production levels surpassing production levels by 570,000MT. With the country opening the month with no rice stocks, this situation indicates high import levels during the month. Soybean consumption levels were significantly lower than production levels indicating a surplus of approximately 80,000MT. Food stocks available in the country's national strategic reserve indicate a 4 million ton grain gap which suggests an urgent need for the country to import food to meet national requirements.

Table 1: Ethiopia Food Consumption and Stocks May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	8600	8600	803	806
Millet	1100	1100	0	0
Sorghum	5200	5300	670	575
Rice	91	661	0	0
Soybean	100	20	4	4

Source: United States Department of Agriculture: Foreign Agriculture Service

Kenya: Maize stocks declined by 25% in May, with the country closing the month with approximately 315,000MT stocks of maize. Domestic maize consumption levels were higher than local production, indicating low food availability in the country. Millet consumption levels matched production levels during the month with the country closing the month with no millet stocks. Sorghum consumption levels exceeded production levels during the month by 120,000MT, with stocks remained stable at 34,000MT. Rice consumption levels were significantly higher than production levels, exceeding production by 650,000MT with stocks remaining stable during the month at 69,000MT. According to reports by the Ministry of Agriculture, the Food Reserves held in the National Strategic Grain Reserve stood at 28,715,870MT, with food availability reported in 16 counties across the country, representing approximately 30% of the country's food demand. These counties have a sufficient supply of maize, rice, sorghum, millet, beans, and potatoes but are likely to have a shortage of wheat in the short-term. These low food stocks across the country confirm the food security crisis in the country. To prevent the food crisis, the Kenyan government plans to import 2 million bags of maize to supplement local production, and spur farmers to release their stock of maize.

Table 2: Kenya Food Consumption and Stocks May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	3400	4800	420	315
Millet	90	90	0	0
Sorghum	150	270	34	34
Rice	80	730	69	69

Source: United States Department of Agriculture: Foreign Agriculture Service

Kenya is set to import 4 million bags of maize as the country loses its grain reserves to aflatoxin, a toxin caused by mould³²

Agriculture Cabinet Secretary Peter Munya told the Senate Committee for Agriculture that maize in the country's Strategic Grain Reserves is unfit for human consumption as it has been contaminated by aflatoxin. The loss comes when the country is still struggling with a locust invasion and the effects of the novel coronavirus pandemic, both of which have adversely affected the country's food chain as markets are closed and movement remains restricted in some counties. In response, Kenya plans to import 2 million bags of white maize for human consumption and an additional 2 million bags of yellow maize for animal feed between end of June and mid-July.

Rwanda: Maize consumption levels exceeded production levels by 120,000MT as stocks decreased by approximately 20% to close the month at 41,000MT. Millet consumption levels matched production levels as the country closed the month with no reserve stocks. Sorghum consumption exceeded production levels by 20,000MT as stocks remained stable at 4,000MT. According to the Permanent Secretary in the Ministry of Agriculture, Rwanda has a surplus in its strategic grain reserve and will continue to monitor and collaborate with other agencies including the emergency response team to ensure vulnerable people are supported with food until the end of the lockdown³³.

Table 3: Rwanda Food Consumption and Stocks May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	420	540	51	41
Millet	4	4	0	0
Sorghum	150	170	4	4

Source: United States Department of Agriculture: Foreign Agriculture Service

South Sudan: The country was generally in food deficit during the month as maize and sorghum consumption levels exceeded production levels for the month by 10,000MT and 150,000MT respectively, with no reserve stocks at the close of the month. Millet consumption matched production levels at 6,000MT with the country closing the month with no stocks.

Table 4: South Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	100	110	0	0
Millet	6	6	0	0
Sorghum	700	850	9	9

Source: United States Department of Agriculture: Foreign Agriculture Service

Tanzania: Maize consumption levels exceeded production levels for the month by 100,000MT as stocks remained stable at 481,000MT. Millet consumption levels matched production levels for the month with the country closing the month with no stocks. Sorghum consumption levels matched production levels with stocks declining marginally by 6% to close the month at 84,000MT. Rice consumption levels exceeded production levels by 160,000MT with the country closing the month with no stocks. The Tanzanian government reported that the country opened the current season with 3,071,048MT and currently has approximately between 40,000MT and 45,000MT of maize held in the country's National Food Reserve Agency. In addition, the country has

³² <https://allianceforscience.cornell.edu/blog/2020/05/kenya-prepares-to-import-maize-in-the-midst-of-COVID-19-pandemic/>. Accessed 27 May 2020

³³ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

approximately 16,000MT held by the Cereals and Other Produce Board (CPB). These stocks are expected to last the country for 1.5 months³⁴.

Table 5: Tanzania Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	6000	6100	481	481
Millet	350	350	0	0
Sorghum	800	800	89	84
Rice	2070	2230	0	0

Source: United States Department of Agriculture: Foreign Agriculture Service

Uganda: Maize consumption levels were lower than production levels for the month by 150,000MT with stocks increasing by 55% to close the month at 155,000MT. Millet consumption levels matched production levels with the country closing the month with no stocks. Sorghum consumption levels were lower than production levels for the month by 15,000MT. Rice consumption levels were significantly higher than production levels exceeding production by 80,000MT with the country closing the month with no stocks. Soybean consumption levels were lower than production levels for the month by 5,000MT with the country closing the month with no stocks. Although the country does not have a National Strategic Grain Reserve, the Permanent Secretary in the Ministry of Agriculture reported that the country has enough maize and beans stock to last the country until the next harvest in May and June. Food stocks held by the private sector are also expected to last the country for the next two month³⁵.

Table 6: Uganda Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	2800	2650	100	155
Millet	240	240	0	0
Sorghum	400	385	58	68
Rice	166	246	0	0
Soybean	30	25	0	0

Source: United States Department of Agriculture: Foreign Agriculture Service

6.2 Southern Africa

Southern Africa has seen an improvement in the region's food security situation moving from IPC Phase 3, which indicates a food crisis, to a stressed and minimal food security phase across different areas over the past month. This improved food security situation has been largely due to the increased food availability as the region is currently under its main harvest period over April to May 2020. However, Crisis (IPC Phase 3) outcomes are expected to persist in parts of Zimbabwe, DRC, and Mozambique, where crops failed due to poor rainfall or conflict disrupted the agriculture season. In addition, these countries have been affected by the COVID-19 pandemic which has disrupted remittances and informal cross border trade mainly from South Africa. As the region goes through its main harvesting period, minimizing post-harvest losses and ensuring food distribution remains uninterrupted both locally and across borders is critical to minimizing potential food insecurity across the region.

Further, and as some countries in the region prepare for the winter crop season, mainly wheat, it is important that access to critical factors of production, namely inputs and labour remain in place to ensure production is not affected. Analysis of the current food stocks available in selected countries across the region held in both

³⁴ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

³⁵ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

private and public food reserves reflects the varied food security phases of the different countries with Malawi, Mozambique and Zimbabwe noted to have very low food stocks to sustain the countries over the next couple of months. This reflects the urgent need to ensure food trade activities remain uninterrupted for countries that depend mostly on food imports to meet their national food requirements. Over the June-September period the

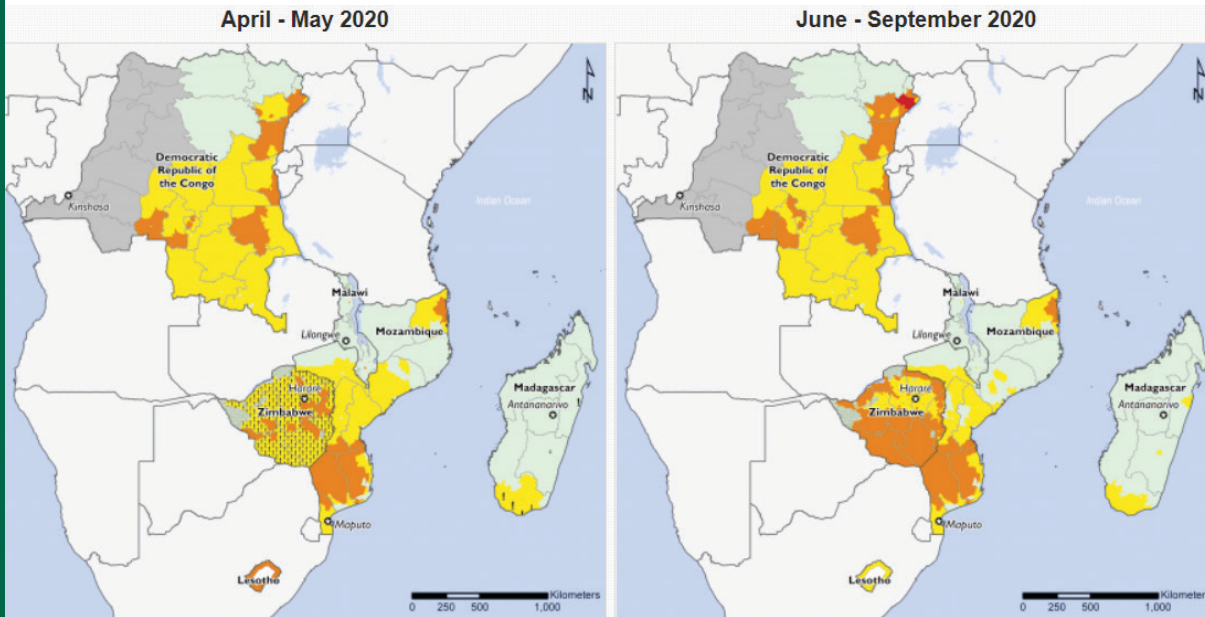


Figure 18:
Southern Africa
Food Security
Classification April-
May and June-
September 2020³⁶

IPC v3.0 Acute Food Insecurity Phase

Presence countries: 1: Minimal (light green), 2: Stressed (yellow), 3: Crisis (orange), 4: Emergency (red), 5: Famine (dark red), National Parks/Reserves (hatched pattern)

Remote monitoring

countries: 1: Minimal (light green), 2: Stressed (yellow), 3+: Crisis or higher (orange)

! Would likely be at least one phase worse without current or programmed humanitarian assistance

Not mapped (grey)

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners. FEWS NET only maps the Eastern half of DRC.

food security situation is expected to remain stable except for Zimbabwe, where the situation is projected to move from stressed to a crisis for most parts of the country.

Malawi: Maize consumption levels were lower than production levels for the month by 100,000MT with stocks increasing by 27% as the country went through its main harvest season. Wheat consumption levels were significantly higher than production levels exceeding production by 150,000MT with stocks increasing by 14% to close the month at 8,000MT. According to the Government of Malawi the country expects a harvest of 3.7 million tons this season and does not anticipate any food shortages for the next two to three months. Currently, Malawi has 3,000MT in stock in its reserves and the government plans to replenish the reserve by purchasing grains worth about US\$ 6mn³⁷.

Table 7: Malawi Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	3400	3300	188	238
Wheat	1	160	7	8
Rice	0	0	0	0
Soybean				

Source: United States Department of Agriculture: Foreign Agriculture Service

³⁶ <https://fewsn.net/southern-africa/key-message-update/may-2020>. Accessed 28 May 2020

³⁷ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

Mozambique: Maize consumption levels were higher than production levels for the month by 400,000MT, with stocks declining significantly by 62% to close the month at 61,000MT. Millet consumption levels matched production levels for the month with the country closing the month with no stocks. Sorghum consumption was higher than production by 75,000MT as stocks decreased by more than 80%. Rice consumption levels were significantly higher than production levels exceeding production by 700,000MT. The government reported that the country currently has a 500,000MT rice deficit with approximately 300,000 MT of this expected to be covered by imports³⁸.

Table 8: Mozambique Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	1400	1800	161	61
Millet	20	20	0	0
Sorghum	200	275	80	15
Rice	195	895	0	0

Source: United States Department of Agriculture: Foreign Agriculture Service

Zambia: Maize consumption levels were lower than production levels for the month by 450,000MT with stocks increasing significantly by 92% to close the month at 564,000MT. This surplus situation is a result of increased food stocks from the country's main harvest over the past two months. Millet and sorghum consumption levels matched production levels at 30,000MT and 15,000MT as the country closed the month with no stocks for both commodities. Wheat consumption exceeded production levels by 65,000MT with stocks increasing by 41% to close the month at 17,000MT. Soybean consumption was lower than production levels by 14,000MT, with stocks increasing by 40% to close the month at 14,000MT.

Table 9: Zambia Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	2700	2250	294	564
Millet	30	30	0	0
Sorghum	15	15	0	0
Wheat	160	225	12	17
Soybean	285	271	10	14

Source: United States Department of Agriculture: Foreign Agriculture Service

6.3 West Africa

The food security outlook for West Africa for the March to May 2020 period presented in Figure 19 shows the region is experiencing a minimal (IPC Phase 1) food security outcome, which is projected to continue through to September for most countries in the region. However, some countries are still faced with a food security crisis driven by on-going conflict disrupting marketing and food distribution activities. The impacts of COVID-19 which have also worsened the food security outcomes in some regions where containment measures are also disrupting food production and distribution efforts. The food security threat across the region is projected to affect approximately 11.4 million people that are going to require food assistance over the next couple of months, according to projections by FEWSNET. The majority of the countries in the region are currently under the planting phase of the season which will progress for the next two months. As such, ensuring uninterrupted availability of labour for planting and increasing access to inputs is critical for food production and availability across the region during this period. The food security situation is expected to worsen over the June-August

³⁸ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

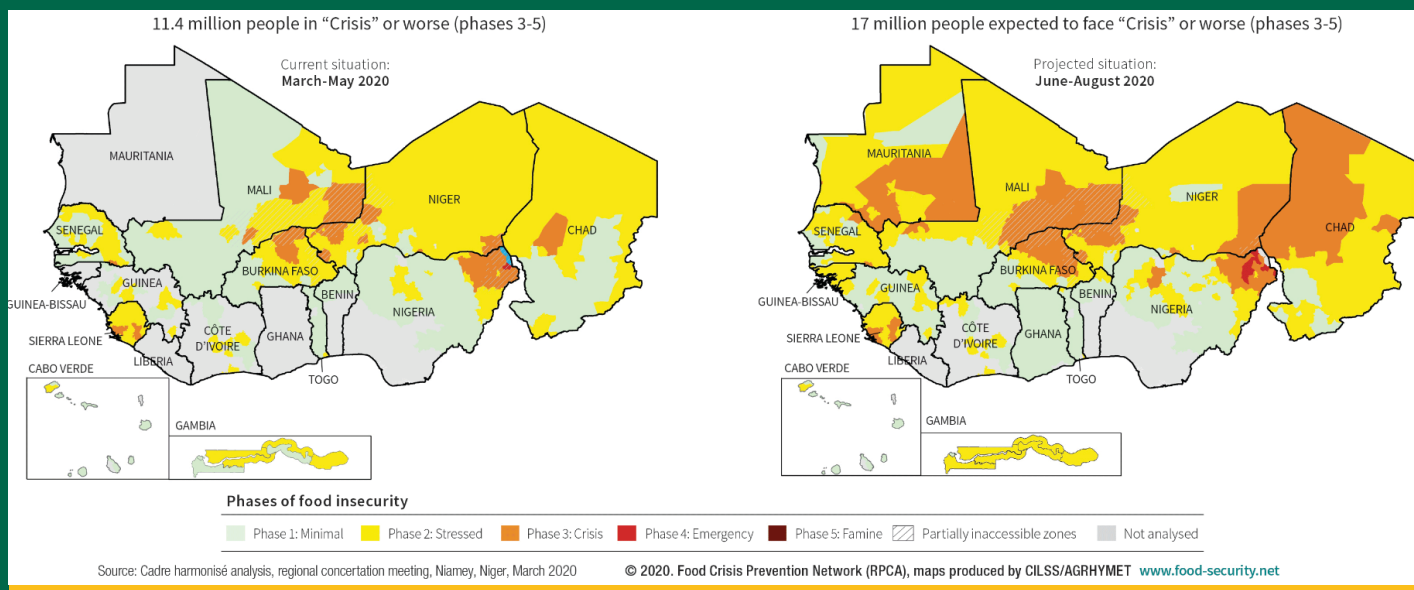


Figure 19: Sahel and West Africa Food and Nutrition Situation³⁹

period, moving to an Emergency and Crisis phase for most countries. This situation is expected to result in approximately 17 million people facing a food crisis across the region (Figure 19). From the outlook, some countries will still experience a minimal food security outcome, and may potentially have a surplus which can be exported to countries facing food shortages during this period. Ensuring food trade activities are maintained will be key to reducing a potential food crisis in the region.

Burkina Faso: Maize consumption levels exceeded production levels for the month by 100,000MT, with stocks decreasing by 50% to close the month at 107,000MT. Millet consumption levels matched production levels for the month, with the country closing the month with no millet stock. Sorghum consumption levels matched production levels for the month with stocks decreasing by approximately 3% to close the month at 173,000MT. Rice consumption levels exceeded production levels significantly by 620,000MT with stocks remaining stable at 41,000MT.

Table 10: Burkina Faso Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	1600	1700	217	107
Millet	1000	1000	0	0
Sorghum	1800	1800	178	173
Rice	234	854	41	41
Soybean				

Source: United States Department of Agriculture: Foreign Agriculture Service

Cote d'Ivoire: Maize stocks remained stable during the month of May, with the country closing the month with the same stock levels of 41,000MT. Consumption levels for maize exceeded production levels marginally by 20,000MT. Millet production levels matched consumption levels of the month as the country closed the month with no millet reserves in stock.

³⁹ <http://www.food-security.net/en/topic/food-and-nutrition-crisis-2020/>. Accessed 28 May 2020

Table 11: Cote d'Ivoire Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	1000	1020	41	41
Millet	65	65	0	0
Sorghum	65	65	0	0
Rice	1400	2650	478	478

Source: United States Department of Agriculture: Foreign Agriculture Service

Ghana: Maize consumption levels exceeded production levels for the month by 150,000MT with stocks increasing by 40% to close the month at 154,000MT. Millet and sorghum consumption levels matched production levels at 175,000MT and 280,000MT respectively with the country closing the month with no stocks for either commodities. Rice consumption levels were significantly higher than production levels exceeding production by 975,000MT with stocks decreasing by approximately 10% to close the month at 232,000MT.

Table 12: Ghana Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	2000	2150	259	154
Millet	175	175	0	0
Sorghum	280	280	0	0
Rice	575	1550	257	232

Source: United States Department of Agriculture: Foreign Agriculture Service

Mali: Maize consumption exceeded production levels for the month by 200,000MT with stocks declining by over 30% to close the month at 421,000MT. Millet and Sorghum consumption levels matched production levels at 1,800,000MT and 1,500,000MT respectively, with the country closing the month with 133,000MT of sorghum but no millet stocks. Rice consumption levels exceeded production levels by 439,000MT with stocks declining by 36% to close the month at 156,000MT.

Table 13: Mali Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	3300	3500	621	421
Millet	1800	1800	0	0
Sorghum	1500	1500	133	133
Rice	2061	2500	245	156

Source: United States Department of Agriculture: Foreign Agriculture Service

Niger: Wheat consumption stood at 230,000MT with the country not having produced any wheat during the month. Millet consumption levels matched production levels at 3,800,000MT with the country closing the month with no millet stock. Sorghum consumption levels exceeded production levels by 100,000MT with stocks declining significantly by approximately 55% to close the month at 62,000MT. Rice consumption levels were significantly higher than production levels exceeding production by 400,000MT with the country closing the month with no rice stocks.

Table 14: Niger Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Wheat	0	230	0	0
Millet	3800	3800	0	0
Sorghum	1900	2000	137	62
Rice	75	475	0	0

Source: United States Department of Agriculture: Foreign Agriculture Service

Nigeria: Maize consumption levels exceeded production levels by 500,000MT as stocks decreased by 45% to close at 122,000MT for the month. Millet consumption levels matched production levels with the country closing the month with no stock. Sorghum consumption was slightly higher than production by 50,000MT with stocks remaining stable at 117,000MT. Rice consumption exceeded production by 1,539,000MT with stocks decreasing by approximately 22% to close at 495,000MT. Soybean consumption exceeded production by 50,000MT with the country closing the month with no stock. According to the Ministry of Agriculture⁴⁰ Nigeria has a total Strategic Grains Reserve of 108,000 MT, 70,000 MT of which has already been released for distribution to vulnerable households. To prevent the country from running out of food reserves, the President has approved the sum of N400 Million for the immediate restocking of the country's National Strategic Food Reserves. He also directed the State Governors to release their reserves and called on the private sector, and especially high net worth individuals and corporate organizations to step forward and support these efforts.

Table 15: Nigeria Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	11000	11500	222	122
Millet	2000	2000	0	0
Sorghum	6900	6850	117	117
Rice	4961	6500	634	495
Soybean	700	750	0	0

Source: United States Department of Agriculture: Foreign Agriculture Service

Togo: Maize consumption exceeded production levels by 20,000MT with stocks decreasing by 21% to close at 55,000MT for the month. Millet and sorghum consumption levels matched production levels for the month at 30,000MT and 300,000MT respectively, with the country closing the month with no stock for either commodities. Rice consumption levels were significantly higher than production, exceeding production by 301,000MT during the month.

Table 16: Togo Food Consumption and Stock Trends May 2020

	Production (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Maize	900	920	70	55
Millet	30	30	0	0
Sorghum	300	300	0	0
Rice	91	401		

Source: United States Department of Agriculture: Foreign Agriculture Service

⁴⁰ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture: 27 April 2020

7. CONCLUSIONS

As COVID-19 cases continue to increase across the continent, ensuring containment measures remain in place to minimize the spread of the pandemic is imperative. However, it is equally important to ensure that as health guidelines are implemented agricultural activities are sustained during the pandemic to mitigate potential food crises given the high food import dependency situation in most countries. Lessons on how to sustain agricultural activities during the pandemic are beginning to emerge as countries and regional economic communities develop response plans that integrate strategies for stabilising food systems and maintaining food security. These range from measures aimed at stabilising inputs and production systems to agro-processing and food distribution systems. While most of the measures are yet to be implemented, they set out a roadmap which provides guidance on some of the key approaches to undertake. Despite these efforts to continue food trade activities, cases of trade restrictions through non-tariff barriers continue to be reported in some countries. Some countries, in an effort to contain the spread of the COVID-19 pandemic, continue to have lengthy and costly customs procedures that restrict trade. This calls for harmonized customs procedures to allow for quicker border processes, avoiding delays in transporting food commodities. This is especially important during the outbreak of the pandemic which has reduced food availability in most import dependent countries.

Favourable climatic conditions expected in some parts of West Africa are projected to sustain the minimal food security outcome across the region. This should be complemented with measures that allow for all critical production factors including inputs and labour

to remain accessible to prevent any potential food shortages. The dry weather conditions projected for Southern Africa are suitable for reducing any potential post-harvest losses as the region closes its main harvesting season over the next month. Any rainfall incidences will lead to post-harvest losses like what occurred in Kenya following the above normal rainfall recorded in the country during the past month. As the desert locust infestations persist, leading to significant food losses, collaborative efforts by various partners to manage the situation is urgent to contain the spread to other regions.

Commodity prices remain generally high across the continent, with a temporary decline in some areas, particularly in Southern Africa, due to increased stock from the region's main harvest. Continued marketing and trade disruptions due to COVID-19 containment measures coupled with food shortages from below average yields due to unfavourable climatic conditions in the previous seasons continue to push commodity prices up across the continent.

The results from the analysis of food consumption and food stocks trends in most countries confirm the food shortage crises across the continent as consumption levels exceed production levels significantly over the past month, except for some countries in Southern Africa where there was a surplus due to the main harvest. Food stocks available in some of the national strategic reserves are not sufficient to sustain the countries in the long term as they are projected to last for the next two to three months. This situation further confirms the need to allow food trade activities to continue uninterrupted as the COVID-19 pandemic situation progresses.

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