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RESILIENCE INITIATIVE

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Summary

The goal of AGRA's Food Security Monitor is to provide an overview assessment of the prices of main food staples and the food security outlook in AGRA focus countries in East, West and Southern Africa, taking into account government interventions that impact on domestic and regional food trade alongside the impact of forecast weather changes and environmental conditions on food security. The main findings from the report are summarized below.

Increasing disruptions to agricultural farming systems as a result of multiple shocks: The multiple shocks in many parts of the continent are causing severe disruptions to agricultural farming systems with devastating impacts on affected populations. The COVID-19 pandemic and containment measures, armed conflict and insecurity have severely affected the functioning of food markets, among other impacts disrupting the movement of food from surplus to deficit areas. Movement of food from surplus areas to deficit regions remains a priority either through food trade and or humanitarian means to address acute food and nutrition challenges attributed to some of these risk factors.

Continued food price spikes because of COVID-19 and climate shocks: The continued food price spikes in some parts of the continent demonstrate the effects of the COVID-19 pandemic and containment measures on food and nutrition security in Africa. Food prices decreased in Malawi and Zambia due to good harvests in the recent season. Other countries such as Zimbabwe, southern Mozambique and southern Madagascar experienced below-average yields and face severe food shortages. Food prices increased in the past month in parts of East and West Africa while they remained stable in some areas but higher than last year levels. In East Africa, the continued desert locust infestations coupled with the COVID-19 pandemic and containment measures contributed to localised food shortages have led to upward price trends over the past month. Commodity prices in West Africa were generally stable at levels above previous year levels after the demand eased following the end of the Ramadan festival. Prices generally remained high in persistent armed conflict-affected areas where food supplies and distribution efforts remain disrupted.

Disruption of food and trade activities due to COVID-19: The continued disruption of food distribution and trade activities due to the COVID-19 pandemic has demonstrated the need for countries to reduce their import dependency and increase domestic food production to ensure self-sufficiency. In recognition of this need to ensure food self-sufficiency, most countries across the continent have turned their efforts towards rehabilitating and restocking their national strategic grain reserves. Governments in some countries have partnered with private sector players to help with the restocking of national grain reserves demonstrating the importance of public and private partnerships in driving the agricultural development and food security agenda on the continent.

Low consumption levels suggesting the ability to purchase food across sub-Saharan Africa has declined: Food supply and consumption across the regions suggest that most countries had a food surplus during the past month as total food supplies exceeded domestic consumption in most countries. However, the low consumption levels might also imply that the effective demand for food, which looks at the ability to purchase food in most countries has declined. Most low-income households who depend on informal sector had their livelihoods and incomes affected by the COVID-19 pandemic and containment measures. Stock trends showed that commodity stocks decreased in most countries with some countries having no stocks at the opening and close of the month except in some countries in Southern Africa where supplies increased significantly due to the ongoing main harvest.

Introduction

The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade and food and nutrition security. The discussions presented focus on selected countries of interest to AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Tanzania and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe) and West Africa (Burkina Faso, Ghana, Mali, Niger, Nigeria and Togo).

COVID-19 and Government Interventions: Impacts on Food Trade and Food Security

Despite the late spread of the COVID-19 pandemic in Africa, the number of confirmed cases has rapidly increased in several countries in recent weeks. As of 25 June 2020, 347 836 cases, 166 074 recoveries and 9 070 deaths have been confirmed across the African continent. The increasing number of confirmed cases is mainly due to local transmission as national borders have since been closed for human travel except in border towns where truck drivers have been on the spotlight for causing transmission across borders. However, limited testing capacity in many African countries indicates that the actual number of cases is likely more than the reported figures. Figure 1 shows the COVID-19 cases and government measures to contain the spread of the pandemic in selected countries.

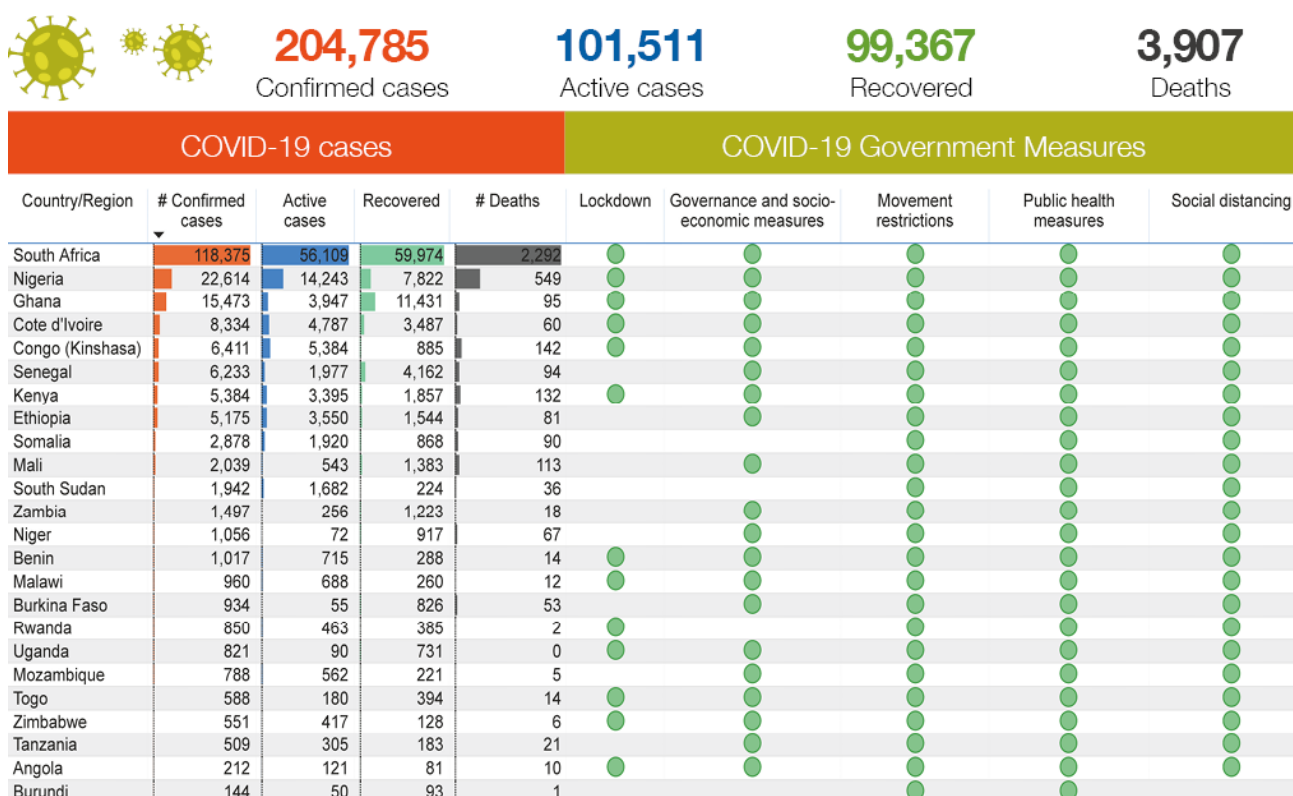


Figure 1: Summary of coronavirus (COVID-19) cases and government measures in selected African countries

Source: Own construction based on data from Johns Hopkins University

Regional Food Trade Trends

The operations, functioning and efficiency of food markets have also severely suffered due to the COVID-19 pandemic and containment measures. Food trade, particularly logistics of moving food from the strategic surplus region and deficit areas were severely affected by the COVID-19 pandemic and containment measures. Despite efforts by different actors such as governments and Regional Economic Communities (RECs) to keep trade of essential goods and services uninterrupted during the containment measures, the experiences have shown that food trade and other essential services were also affected.



Figure 2: Trucks stuck in traffic at Malaba border on 27 May 2020

Source: <https://www.nation.co.ke/kenya/news/union-suspends-movement-of-trucks-to-uganda-309140>. Accessed 15 June 2020

The assessment of trade flows through national borders by COMESA showed substantial import volume declines in April compared to records for March 2020: Malawi and Rwanda (32% decline)¹²; Zambia (25% decline)³ and Uganda (30% decline)⁴.

The following trade changes were observed in selected countries as countries responded to the COVID-19 pandemic.

Rwanda: Maize exports from Tanzania increased after the country stopped importing maize from Uganda with bean exports to the DRC increasing supported by an increase in supply from the country's main harvest.

Uganda: Maize exports to South Sudan increased helping stabilise prices in the country despite the high inflation rates. The Government announced an increase in import duty on agricultural products produced locally to 60% to raise revenue and promote import substitution and the development of local industries. The move specifically, targets the sugar sector where the country is seeking to promote local production of refined sugar and reduce refined sugar imports into the country. This move will significantly affect trade activities between Uganda and its trade partners and will impact businesses of importing companies in Uganda.

Tanzania: Heavy rains which resulted in flooding in some parts of the country increased the levels of aflatoxin in maize, which resulted in a decrease in maize exports to Kenya.

Kenya: The Government introduced a new verification/inspection tariff at Nairobi Inland Container Depot which will result in the Kenya Ports Authority (KPA) charging US\$80 for 20 feet containers and US\$ 120 for 40 feet containers, due to outsourcing of labour to conduct inspections and verification on behalf of Kenya Bureau of Standards and Kenya Revenue Authority. Besides, at the Taveta border-post trucks without Electronic Cargo Tracking gadget (GPS) based on provisions 73 (1) and 204 (a) and (b) of the EACMA 2004 revised in 2017 are being charged a fine of Ksh 100,000 by Kenya Revenue Authority. These measures would likely increase trade costs and potentially increase the food

¹ COMESA. 2020. COVID-19 Impacts on Trade: Malawi Report. COMESA, Lusaka, Zambia.

² COMESA. 2020. COVID-19 Impacts on Trade: Rwanda Brief. COMESA, Lusaka, Zambia.

³ COMESA. 2020. COVID-19 Impacts on Trade: Zambia Report. COMESA, Lusaka, Zambia.

⁴ COMESA. 2020. COVID-19 Impacts on Trade: Uganda Brief. COMESA, Lusaka, Zambia.

prices in destination countries, which may limit food access among low-income households who have lost incomes due to the COVID-19 pandemic.

Zambia: The Minister of Agriculture announced on 27 May that the Food Reserve Agency would be purchasing 1 million metric tonnes of maize to boost the low carryover from the previous season and secure food security in the country⁵. He announced this development during the presentation of the Official Crop Forecast Survey results for the 2019/2020 agricultural season. To enforce the decision and achieve the national target, the Government banned maize exports. The decision has negative impacts on food and nutrition security situation in countries that depend on maize imports from Zambia such as the Democratic Republic of Congo (DRC) and Zimbabwe. Historically, these export bans would result in an increase in informal cross border trade of maize into DRC and Zimbabwe. However, the COVID-19 restrictions are affecting informal cross-border trade activities and many livelihoods that depend on them.

Zimbabwe: The easing of GMO restrictions in Zimbabwe has seen an increase in imports from South Africa, leading to a seasonal stable food security outcome.

Food Systems Stabilization Policy Actions and Measures

The COVID-19 pandemic and resultant containment measures which have restricted food distribution and trade activities, particularly in import-dependent countries, has demonstrated the need for countries to increase domestic food production and availability to ensure self-sufficiency. On the back of this realization, countries have begun developing and implementing COVID-19 response plans that are focusing on increasing domestic food production and availability. Also, to ensure that agricultural production and distribution activities continue uninterrupted, the past month has seen most countries turning to strategic grain reserves as critical instruments for ensuring food security. Some governments are partnering with private sector companies to help restock the national grain reserves. These developments have demonstrated and reemphasized the importance of public-private partnerships in driving the agricultural development agenda on the continent. Further, most countries are beginning to open up their economies including some parts of the informal sector which has allowed low-income households who depend on the informal sector for their livelihoods to access much-needed incomes which were affected by the pandemic.

To better understand the measures being adopted by various governments to help stabilize food systems and increase agricultural production in the wake of the COVID-19 pandemic, AGRA convened its second virtual meeting with the Permanent Secretaries of Agriculture from 10 African countries on 02 June 2020. The discussions focused on understanding the strategic policy actions by governments related to building Food Reserves and Buffer Stocks for sustainable and resilient food systems. The meeting also discussed policy measures to ensure sustained food production, distribution and trade activities and to minimize the food insecurity in the country. Figures 3-5 present the highlights of the food systems stabilization measures by region.

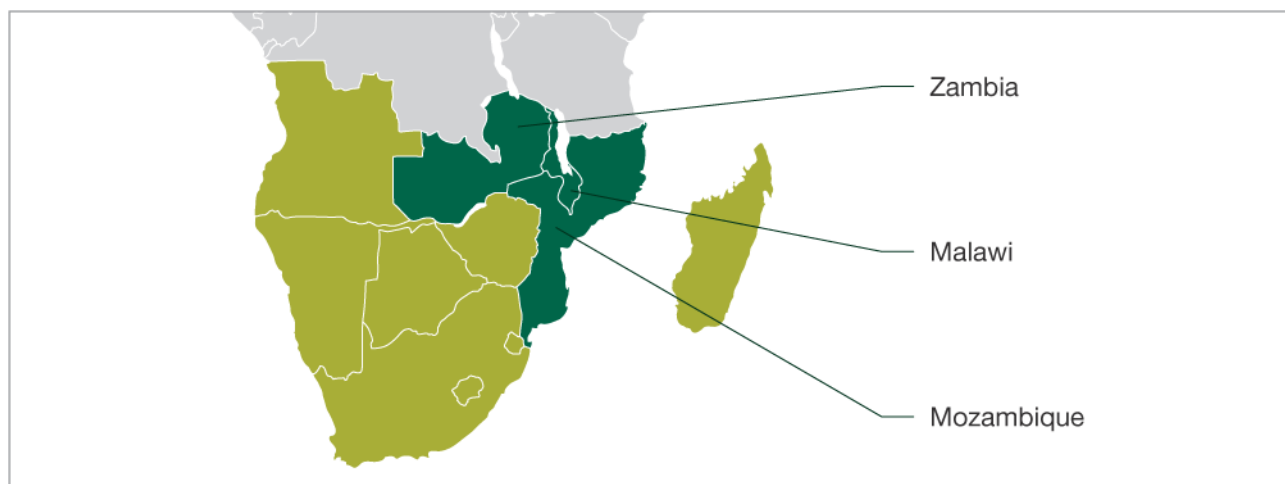
⁵ <https://www.lusakatimes.com/2020/05/27/zambias-maize-production-seen-to-jump-to-3-3-million-metric-tones/>

Figure 3: Food systems stabilization measures by selected countries in East Africa⁶



⁶ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 02 June 2020

Figure 4: Food systems stabilization measures by selected countries in Southern Africa⁷



MALAWI

- Malawi has finalised her COVID-19 response plan for agriculture, also included into the national COVID-19 plan.
- The government is currently buying to restock the strategic grain reserve; however, it may not meet its target due to limited resources and is looking to partner with the private sector to restock the reserves.
- The government is looking to purchase 220,000MT for the national strategic grain reserve with the government buying 120,000MT and the private sector covering the balance of 100,000MT.
- The government is rehabilitating 20 irrigation schemes to increase the land under irrigation to 118,000 hectares by the next planting season.
- The government has published tenders for private sector companies to import fertiliser and other agricultural inputs that can reach 900 000 farmers to avoid delays in the next planting season.

ZAMBIA

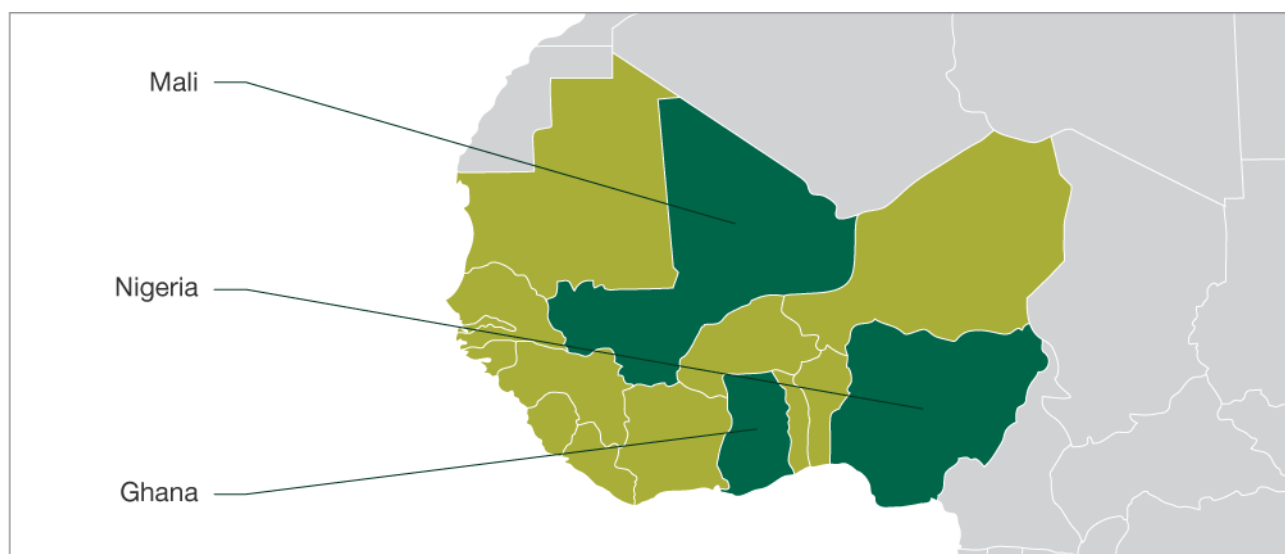
- The Zambian government is focusing mostly on ensuring food self-sufficiency by restocking its national strategic grain reserve, the Food Reserve Agency with 1 million metric tonnes of maize.
- A total of K 1 billion has been released to allow the FRA to participate in the maize marketing season.

MOZAMBIQUE

- The government is partnering with the private sector to create food reserves in the current marketing campaign to reduce import rates.
- Government has reduced value-added tax for sugar and soap and electricity by 10% until 31st December 2020.
- Government has begun developing its COVID-19 response plan, aimed at ensuring the availability of food for the next 12 months, and avoid agricultural production disruption the plan has five key focus areas:
 - Ensure humanitarian safety for workers in the ag sector.
 - Availability and access to food security.
 - Reduce the impact of unemployment through investment in rural development.
 - Reduce the impact of COVID-19 on 2020/2021 planting season and,
 - Bring a new dynamic to production cycle to be able to respond from a short, medium to long term.

⁷ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 02 June 2020

Figure 5: Food systems stabilization measures by selected countries in West Africa⁸



GHANA

- The government is concentrating on food crop and value chains like rice, maize, beans, greenhouse for jobs for young people and mechanization while strengthening the Rearing for Food and Jobs programme.
- The government is mobilising the private sector to help revitalise the country's strategic grain reserves and increase storage capacity annually by 50 000 MT to meet the 250,000 targets from the current 35,000 MT which has failed to materialise due to lack of funding.

MALI

- The government is providing price support to farmers by buying each kilogram of cotton produced locally at 250 CFA for the first choice.
- The government is granted a subsidy of CFA 35 billion (USD 60 million) to the cotton sector to support the cost of fertilizer.
- The government has established strategic food reserve to increase the National Security stock and of States: the current stock is 221 139MT for cereals from National stock, the regional stock for state and food aid.
- The government has distributed 40 000MT of cereals to vulnerable groups and plans to continue free distribution of 56 000 MT of cereals.
- The government is supporting 115 women food cooperatives for processing and preserving food
- The government is distributing 5000 marketing gardening kits to farmers.

NIGERIA

- Nasarawa state government lifted the ban on markets (shutdown since March 2nd), with compulsory face masks, social distancing and provision of hand sanitizer and running water.
- Federal Government has approved N13 billion (USD 33 million) intervention fund to control trans-boundary pests and minimize the impacts of Covid-19 in the agricultural sector and guarantee national food security in 12 frontline northern states.
- Government is working with various development partners to ensure farmers have access to seed across 23 states in the country. To this end, Initiative for Citizens' Rights, Accountability and Development (ICRAD) has supported and distributed seed to 10 000 maize and sorghum farmers.
- Government is also working on replenishing the country's strategic grain reserves
- Government has also created a funding scheme for smallholder farmers of NGN500 billion (US \$1.291 billion) through the Central Bank, expected to benefit 2 million farmers in the country.
- An additional NGN60bn (\$155mn) has been allocated towards investment in rural infrastructure to open up farming cluster; this will allow farmers to have access to markets aimed at opening market clusters and stimulate micro-value chains market.

⁸ AGRA virtual meeting with Permanent Secretaries from Ministries of Agriculture, 02 June 2020

ECOWAS Ministerial Coordinating Committee Recommends Gradual and Coordinated Opening of Borders⁹

The ECOWAS Ministerial Coordination Committee on Transport, Logistics and Trade on 17 June 2020 made recommendations for harmonized and gradual re-opening of land, air and sea borders to restore cross-border economic activities particularly to facilitate the movement of essential goods and services in the fight against the COVID-19 pandemic (ECOWAS, 2020). The three-phased approach recommended by the Ministers include:

- a. Opening of local internal domestic air and land transport within ECOWAS Member States
- b. Opening of land and air borders between ECOWAS Member States to facilitate free movement of goods and persons applying strict proposed guidelines for harmonization and facilitation of cross-border trade and transport in the region.
- c. Opening of air and land borders to other countries with low and controlled cases of COVID-19 rates according to WHO classifications

Agricultural Commodities and Food Price Monitoring

East Africa

Prices for primary grain commodities continued to increase in the past month sustained by COVID-19 related food distribution and trade disruptions which resulted in seasonal food shortages in some areas across the region. Food shortages due to multiple stressors that include floods, desert locust infestations have also resulted in some seasonal price spikes in the region. The upward price trend would likely continue over the next couple of months for most countries unless if these stressors are managed. Easing and eventual removal of COVID-19 pandemic restrictions that have impacted the transport and logistics sector in the region will help improve food security outcomes in the region, particularly in Kenya, Tanzania, Uganda and Rwanda. The easing of restrictions will facilitate the movement of food to areas of need and contribute to easing shortages and current and potential price spikes.

In **Ethiopia**, prices for the major grain commodities maize, sorghum and wheat generally remained stable in May. Nevertheless, prices remained generally higher than previous year levels during the same period due to the continuous depreciation of the national currency, which has resulted in increased transport and production costs. Trade and logistics disruptions triggered by the COVID-19 pandemic, which affected market availabilities also contributed to the high prices¹⁰. In **Kenya**, despite the recent secondary harvests commodity prices for main cereals, namely, maize remained high and continued to increase in the country as the harvest was below average. In **Rwanda** maize prices temporarily declined in May before increasing in June despite the increase in supply after traders released stocks ahead of the second season harvest¹¹ and increased imports from Tanzania¹². Sorghum prices also decreased temporarily before going up again in May with prices expected to

⁹ ECOWAS. 2020. COVID-19: ECOWAS Ministerial Coordinating Committee Recommends Gradual and Coordinated Opening of Borders, Abuja, 17th, June, 2020

¹⁰ FAO. 2020. Food Price Monitoring and Analysis, June 2020

¹¹ FAO. 2020. Food Price Monitoring and Analysis, June 2020

¹² East Africa Crop Monitor (June 2020).

remain stable over the next months. Bean prices also increased in June after a temporary decline in May with the prices expected to continue increasing over the next months. In **South Sudan**, despite easing of movement restrictions in the country, which previously contributed to price spikes in April, prices of cereals in the capital, Juba, continued to surge in May. The problematic macro-economic situation in the country coupled with inadequate domestic supplies and continued armed conflict have contributed to these high price trends recorded in the country¹³. In **Tanzania**, prices remained generally stable over the past month. In **Uganda**, prices continued to increase sustained by high domestic and regional demand. Also, the below-average production due to pre and post-harvest losses from heavy and extended rainfall which resulted in seasonal shortages contributed to an increase in food prices¹⁴.

Table 1: Maize Retail Prices in selected East African Countries¹⁵

Country (Market)	Latest price/kg (LCU)	Price percentage change			
		1 month	3 months	1 year	Next 3 months
Ethiopia (Dire Dawa)*	1060	-7.5	-19.1	37.2	4.5
Kenya (Nairobi)*	2783	-17.3	-18.02	-9.1	
Rwanda (Kabuga)**	280	10.71	28.6	8.3	-40.3
Tanzania (Arusha)*	60 900	-51.3	-51.9	-7.2	26.4
Uganda (Kampala)*	598.54	11.1	-4.7	-4.4	10.3

* Latest price month is April; **Latest price month is June

Southern Africa

Maize prices continued to decline in May as the main harvest progressed and increased commodity supplies across the region. Increased exports from South Africa which has helped increase supply in some countries in the region is also contributing to the downward price trend in these countries, particularly in Zimbabwe following the easing of GMO restrictions in the country¹⁶. In **Malawi**, maize prices continued to fall following improved market availabilities from the ongoing harvests. The announcement by Government to purchase US\$135.2m worth of maize from farmers at MWK 200 per kg¹⁷ above the retail price has put an upward pressure which is expected to increase prices in the near term. In **Mozambique**, ongoing harvests in the country contributed to seasonal price declines in May despite prices remaining above previous year levels due to below-average harvests affected by adverse weather conditions in particular cyclone Idai. In **Zambia**, cereal prices decreased as supplies increased from the ongoing harvest. The continued maize export ban is contributing to increased local supplies of maize and has also resulted in prices decreasing in the past month.

¹³ FAO. 2020. Food Price Monitoring and Analysis, June 2020.

¹⁴ Eastern Africa Crop Monitor (June 2020).

¹⁵ Author's construction based on data from WFP (2020)

¹⁶ <https://www.agriorbit.com/agrimarkets-zimbabwe-lifts-ban-on-gm-maize-imports/> Accessed 27 June 2020

¹⁷ <https://www.foodbusinessafrica.com/2020/04/29/admarc-seeking-us135-2m-loan-to-finance-purchase-maize-produce-from-malawian-farmers/> Accessed 26 June 2020.

Table 2: Maize retail prices in selected Southern African Countries¹⁸

Country (Market)	Latest price/Kg (LCU)	Price percentage change			
		1 month	3 months	1 year	Next 3 months
Malawi (Lilongwe)*	326.31	-20.8	-7.3	44.8	-10.2
Mozambique (Maputo)	25.71	-13.9	16.3	20.3	-4.8
Zambia (Lusaka)*	5.2	-1.3	3.8	46.5	23.3

West Africa

Prices generally remained stable following the end of the Ramadan festival which resulted in a temporary increase in food demand which led to price spikes in some parts of the region. Armed conflicts and continued movement and trade restrictions which are limiting food distribution efforts resulting in seasonal food shortages have contributed to price spikes in other parts of the region. In **Burkina Faso**, prices generally remained high despite improved domestic availabilities following the increased demand during the Ramadan festival, which saw a seasonal depletion in stocks. In conflict-affected areas, prices also remained significantly high as distribution efforts remain disrupted, resulting in shortages. In **Cote d'Ivoire**, prices varied across commodities and different markets with maize prices increasing and rice prices remaining stable in Man market while Cassava prices decreased in Korhogo market. In **Ghana** prices of maize were generally stable in April after increasing from March levels mostly due to easing of COVID-19 pandemic restrictions allowing market activities to resume and increased availabilities. In **Niger**, prices varied across market and commodities with rice prices increasing in most markets, and sorghum millet prices remaining generally stable despite temporary shortages due to COVID-19 disruptions and increased demand during the Ramadan festival. Conflicts in the Diffa, Tahoua and Tillabery regions continue to affect food distributions resulting in high commodity prices in these areas¹⁹. In **Nigeria**, prices of locally produced cereals rose further in April and at a steep rate, underpinned by strong buying amid movement restrictions related to COVID-19 and the Ramadan festive period. The lockdown measures worsened the situation in the northeast of the country, already affected by the prolonged conflict. Prices in April were overall well above their levels a year earlier²⁰.

Table 3: Maize retail prices for in selected West African countries²¹

Country/Market	Latest price/kg (LCU)	Price percentage change			
		1 month	3 months	1 year	Next 3 months
Burkina Faso (Ouagadougou, Sankaryare)*	150.5	3.3	-2.6	-0.7	-1.1
Cote d'Ivoire (Man)	250	22.4	30.0	20.0	-2.4
Ghana (Kumasi)*	173.34	5.77	3.8	4.8	2.9
Mali (Bamako)	200	12.5	19	6.5	2.6
Niger (Lagos)*	40.19	-2.8	6.7	0.0	-1.3
Nigeria (Lagos)*	40.19	-2.8	6.7	0.0	-1.3

¹⁸ Author's construction based on data from WFP (2020)

¹⁹ FAO. 2020. Food Price Monitoring and Analysis, June 2020

²⁰ FAO. 2020. Food Price Monitoring and Analysis, June 2020

²¹ Author's construction based on data from WFP (2020)

Food Security Outlook

East Africa

East Africa continued to experience a Crisis (IPC Phase 3) and Stressed (IPC Phase 2) food security situation (IPC Phase 3) in May across most countries particularly in areas affected by the desert locust infestations (Figure 6). COVID-19 related food distribution and trade disruptions particularly at the borders around Kenya, Tanzania and Rwanda continue to limit timely food access resulting in seasonal food shortages and prices spikes which are leading to food crises in these regions. The food crisis situation in the region is projected to persist between June and September. There is a need for heightened efforts to address the multiple threats that include the desert locust situation and efficient cross border custom activities to facilitate the movement of food to areas of need.

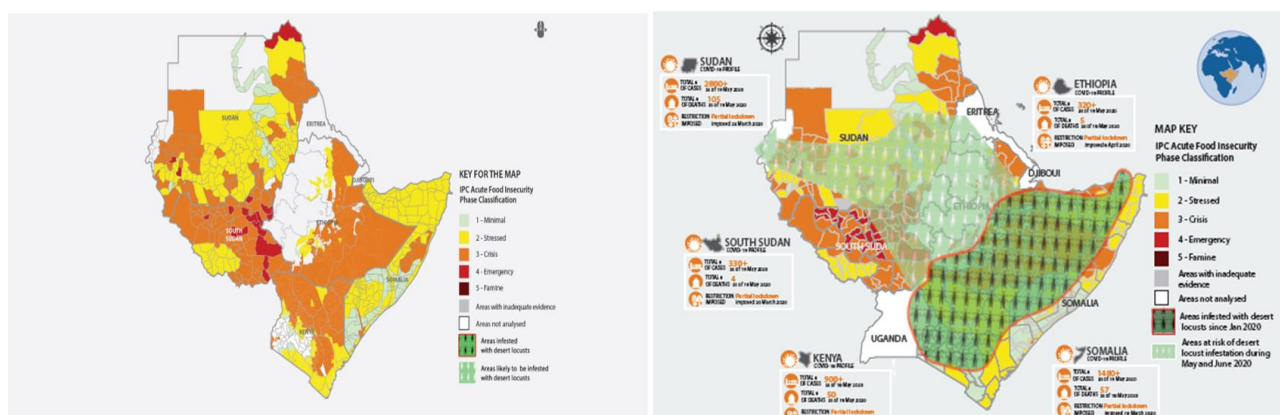


Figure 6: East Africa IPC Food Security Phase Classification²²

The number of people facing a food security crisis in East Africa remains significantly high, particularly in areas affected by desert locusts. The most affected countries include Ethiopia, Kenya, Somalia, South Sudan, Sudan, and Uganda, where an estimated 25.3 million are currently facing a crisis (IPC Phase 3) situation²³. A further 2.76 million people in South Sudan and 120,000 people in Uganda face high levels of acute food insecurity, bringing the total number of the population at risk to nearly 14 million. Table 4 provides the number of people facing a food crisis across the different food security classification phases across selected countries in East Africa.

Table 4: Number of people facing a food security crisis in selected East African Countries (June 2020)²⁴

Country	Stressed (IPC Phase 2)	Crisis (IPC Phase 3)	Emergency (IPC Phase 4)	Catastrophe (IPC Phase 5)	Crisis or Worse (IPC Phase 3+)
Burundi	3 108 000	817 000	42 000		859 000
Car	1 619 209	1 608 758	753 979		2 362 737
Djibouti					
DRC	20 986 039	9 955 921	3 635 796		13 591 717
Ethiopia	10 295 846	6 497 082	1 976 708		8 473 790
Kenya	3 469 363	871 864	112 679		984 543
Rwanda					
Somalia	2 856 000	2 700 000			2 700 000

²² <http://www.ipcinfo.org/ipcinfo-website/ipc-alerts/issue-22/en/> Accessed 25 June 2020

^{23,23} <http://www.ipcinfo.org/ipc-country-analysis/> Accessed 25 June

²⁴ Regional Food Security Update by IPC GSU/Regional (Food Security & Nutrition Working Group, June 2020)

Country	Stressed (IPC Phase 2)	Crisis (IPC Phase 3)	Emergency (IPC Phase 4)	Catastrophe (IPC Phase 5)	Crisis or Worse (IPC Phase 3+)
South Sudan	3 285 000	4 735 000	1 745 000		6 480 000
Sudan	11 835 392	4 809 355	1 043 457		5 852 812
Tanzania	1655 600	760 000	224 700		984 700
Uganda					
Total	59 110 449	32 754 980	9 534 319		42 289 299

Southern Africa

The food security situation varied across countries in Southern Africa in May (Figure 7). Malawi and Zambia experienced a minimal (IPC phase 1) food security phase in May sustained by the main season harvests. Mozambique continued to experience a Crisis (IPC Phase 3) and Stressed (IPC Phase 2) food security phase in most parts of the country except for some areas in northern Mozambique which experienced a minimal food security situation. Improved food availability from the region's main harvest continues to contribute to a decrease in commodity prices and improved food security outcomes in the region. COVID-19 related food system disruptions which are affecting food distribution and trade activities have resulted in isolated cases of food shortages in import-dependent countries like Mozambique. Over the June to September period, the food security situation is expected to remain stable across the region except in Zimbabwe where the situation is projected to move from a predominately stressed food security situation to a crisis phase.

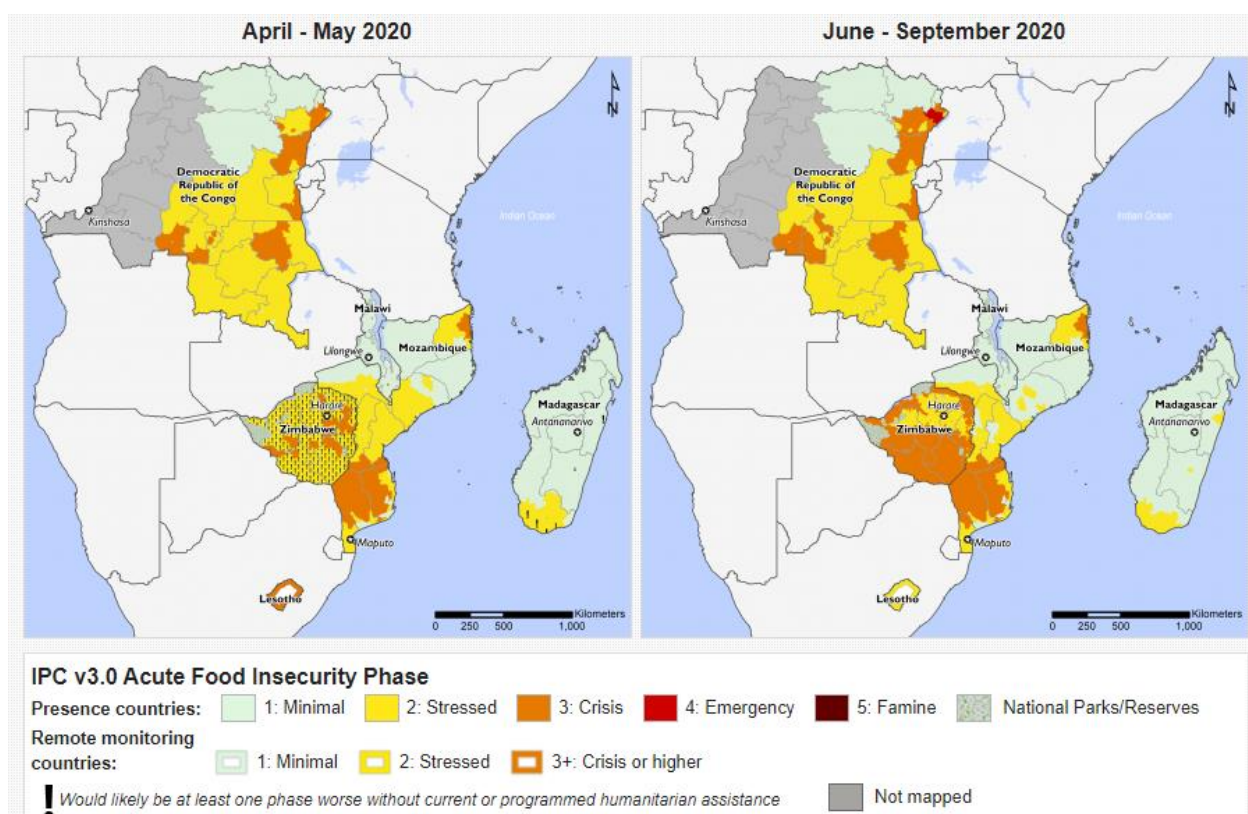


Figure 7: Southern Africa Food Security Classification April- May and June- September 2020²⁵

²⁵ <https://fews.net/southern-africa> Accessed 23 June 2020

West Africa

The IPC food security situation for West Africa indicates that most countries in the region experienced a minimal (IPC phase 1) and stressed (IPC Phase 2) food security situation (Figure 8). The food security situation in the region over the past month continued to be affected by security situation which disrupted food distribution activities and the COVID-19 pandemic which saw countries shutting borders, thus affecting food trade activities.

Between June and August, the situation is projected to worsen with more countries moving from a minimal to a Crisis (IPC Phase 3) and Emergency (IPC Phase 4) food security situation. The main driving factors would be persistent armed conflict and insecurity in the region, which continues to disrupt food production and distribution activities. The COVID-19 pandemic and associated containment measures likely to remain in place over the next couple of months also contribute towards the deteriorating food and nutrition situation in the region.

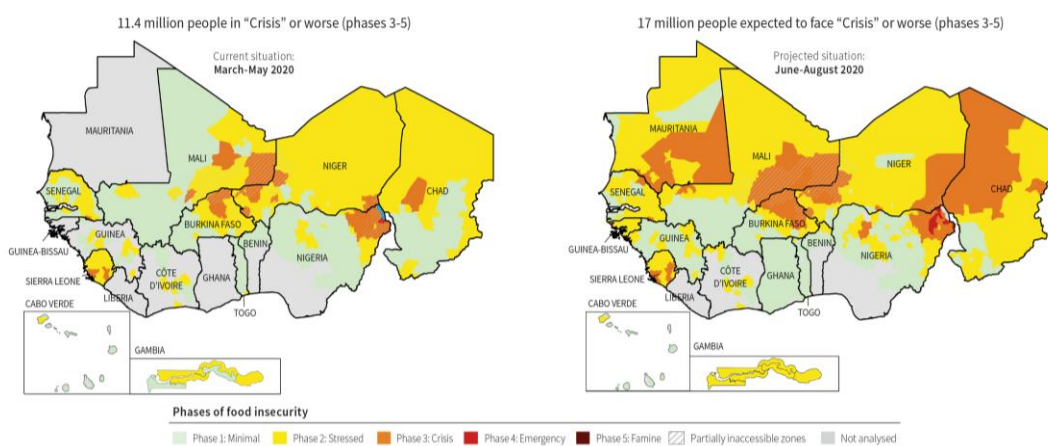


Figure 8: Sahel and West Africa Food Security Situation²⁶

Currently, an estimated 11.4 million people are facing a food security crisis with this number expected to increase to 17 million between June and August 2020²⁷. Table 5 shows the breakdown of the estimated number of people per phase of food and nutrition security per country.

Table 5: Estimated number of people per phase of food and nutrition insecurity, projected situation (Jun-Aug 2020)²⁸

Country	Phase 1 #People	Phase 2 #People	Phase 3 #People	Phase 4 #People	Phase 5 #People
Benin	7 344 140	795 504	14 578	-	-
Burkina Faso	14 093 370	5 153 661	2 015 791	136 175	-
Cabo Verde	405 622	65 521	10 012	-	-
Chad	10 543 253	3 080 199	882 474	134 884	-
Cote d'Ivoire	5 111 105	901 732	168 398	-	-
Gambia (The)	1 763 268	555 988	136 586	-	-
Guinea	8 573 522	1 419 134	267 170	-	-
Guinea-Bissau	913 456	317 053	67 767	-	-
Ghana	26 726 375	1 804 615	21 712	-	-
Mali	15 541 372	3 654 887	1 210 866	129 874	-

²⁶ <http://www.food-security.net/en/topic/food-and-nutrition-crisis-2020/> Accessed 23 June 2020

²⁷ <http://www.food-security.net/en/topic/food-and-nutrition-crisis-2020/> Accessed 23 June 2020

²⁸ <http://www.food-security.net/en/topic/food-and-nutrition-crisis-2020/> Accessed 23 June 2020

Country	Phase 1 #People	Phase 2 #People	Phase 3 #People	Phase 4 #People	Phase 5 #People
Mauritania	2 764 040	799 826	542 194	66 986	-
Niger	15 109 102	5 018 614	1 950 608	61 758	-
Nigeria	76 709 687	19 245 241	6 543 645	543 458	-
Senegal	12 468 577	3 470 287	757 851	8 874	-
Sierra Leone	2 912 022	4 043 410	1 231 462	73 523	-
Togo	5 311 876	453 115	3 560	-	-
Total	206 290 790	50 778 787	15 824 674	1 155 532	-

Food Supply and Consumption Stocks

This section discusses the food security situation in selected East, South, and West African countries based on the food supply and consumption trends in each region. The discussion uses data from the United States Department of Agriculture (USDA) focusing specifically on the total commodity supplies, domestic consumption levels, beginning and ending stocks for the major grain (maize, millet, rice, sorghum and wheat) and oilseed commodities (soybean). The total supplies data aggregates data for beginning stocks, imports, and total production for each commodity, whereas domestic consumption captures commodity utilization across food, feed, seed, waste, and industrial processing. Beginning stocks data indicates the ending stocks carried into the new month whereas ending stocks indicate available commodity remaining at the end of the marketing month for use in the next month.

East Africa

Food consumption and supply trends show that commodity supplies generally exceeded domestic consumption in most countries for most of the commodities. While this suggests that the region generally had a food surplus during the month, the food security outlook presented in Section 6 indicates that the region generally had a stressed and crisis food security situation. It can, therefore, be inferred that the low consumption levels indicate that most people were unable to purchase food despite it being available. The lack of purchasing power to access food can be confirmed by the high commodity prices that persisted in the region over the past month. Stock trends show a general decline in commodity stocks for most countries except in Uganda, where stocks generally increased across most of the commodities during the month. Table 6 provides country-specific details of food supplies and consumption stocks for June 2020.

Table 6: Food Supply and Consumption stocks in selected East African countries for June 2020

Country/ Crop	Total supplies (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Ethiopia				
Maize	9406	8600	803	806
Millet	1100	1100	0	0
Rice	661	691	0	0
Sorghum	5950	5300	670	575
Wheat	7061	6650	291	366
Soybean	104	20	4	4
Kenya				
Maize	5120	4800	420	315

Country/ Crop	Total supplies (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Millet	90	90	0	0
Rice	799	730	69	69
Sorghum	324	260	44	24
Wheat	2692	2450	242	217
Rwanda				
Maize	591	540	51	41
Millet	4	4	0	0
Sorghum	170	170	0	0
Wheat	240	200	20	20
South Sudan				
Maize	110	110	0	0
Millet	6	6	0	0
Sorghum	859	850	9	9
Tanzania				
Maize	6681	6100	481	481
Millet	350	350	0	0
Rice	2260	2230	0	0
Sorghum	889	800	89	84
Wheat	1279	1160	89	99
Uganda				
Maize	2905	2650	100	155
Millet	240	240	0	0
Rice	256	246	0	0
Sorghum	463	385	58	68
Wheat	566	510	36	46
Soybean	30	25	0	0

Source: Own construction using data from the United States Department of Agriculture: Foreign Agriculture Service

Southern Africa

Food supply and consumption trends in Southern Africa show that consumption levels remained lower than supplies during the month with stocks increasing during the month particularly in Zambia and Malawi reflecting the increase in food availability from the main harvests experienced over the past couple of months. Mozambique saw a decline in commodity stocks across major commodities with consumption showing similar trends with other countries in the region remaining lower than commodity supplies. With the country reported to be facing a food crisis situation (IPC phase 3) in most parts of the country, commodity supply levels exceeding consumption levels illustrates the possibility of limited purchasing power among most people in the country due to possible income losses from the COVID-19 pandemic. Table 7 presents food supplies and consumption details of selected countries for June 2020.

Table 7: Food Supply and Consumption stocks in selected Southern African countries for June 2020

Country/ Crop	Total Supplies (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Malawi				
Maize	3638	3300	188	238
Wheat	168	160	7	8
Mozambique				
Maize	1861	1800	161	61
Millet	20	20	0	0
Rice	895	895	0	0
Sorghum	290	275	80	15
Wheat	807	750	57	57
Zambia				
Maize	3701	2450	294	891
Millet	45	45	0	0
Sorghum	20	20	0	0
Wheat	242	225	12	17
Soybean	295	271	10	14

Source: Own construction using data from the United States Department of Agriculture: Foreign Agriculture Service

West Africa

Food supply and consumption trends in West Africa indicate that consumption levels were generally lower than supplies during the month, thus implying that most countries had a food surplus during the month. With most countries in the region recorded to have experienced a stressed and minimal food security situation, this analysis suggests limited ability to purchase food in the region despite its availability. Stock trends showed a general decrease in commodity stocks across commodities in most countries except in Ghana and Togo where there was an increase in wheat stocks, albeit marginal in Ghana. Table 8 shows food supplies and consumption stocks in selected countries for June 2020.

Table 8: Food Supply and Consumption stocks in selected West African countries for June 2020

Country/ Crop	Total Supply (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Burkina Faso				
Maize	1827	1700	217	107
Millet	1000	1000	0	0
Rice	895	854	41	41
Sorghum	1978	1800	178	173
Wheat	346	340	6	6
Cote d'Ivoire				
Maize	1071	1020	41	41
Millet	65	2150	259	154
Rice	3228	2650	478	478
Sorghum	65	280	0	0

Country/ Crop	Total Supply (1000MT)	Domestic Consumption (1000MT)	Beginning stocks (1000MT)	Ending Stocks (1000MT)
Wheat	822	520	172	152
Ghana				
Maize	2309	2150	259	154
Millet	175	175	0	0
Rice	1782	1550	257	232
Sorghum	280	280	0	0
Wheat	1188	825	198	213
Mali				
Maize	3921	3500	621	421
Millet	1800	1800	0	0
Rice	2656	2500	245	156
Sorghum	1633	1500	133	133
Wheat	457	420	37	37
Niger				
Millet	3800	3800	0	0
Rice	475	475	0	0
Sorghum	2062	2000	137	62
Wheat	230	230	0	0
Nigeria				
Maize	11 722	11 500	222	122
Millet	2000	2000	0	0
Rice	7202	6700	1222	762
Sorghum	7017	6850	117	117
Wheat	5360	4860	200	200
Soybean	750	750	0	0
Togo				
Maize	975	920	70	55
Millet	30	30	0	0
Rice	401	401	0	0
Sorghum	300	300	0	0
Wheat	306	280	16	26

Source: Own construction using data from the United States Department of Agriculture: Foreign Agriculture Service

Climatic Conditions and Potential Implications for Food and Nutrition Security

Figures 9 present the July forecasts of precipitation anomalies. The rainfall forecast indicates that most parts of the East Africa region (such as southwestern Ethiopia, western Kenya, south-eastern South Sudan, western and central Sudan, eastern and central Uganda) will experience a wetter than normal (40-60% chance) rainfall (ICPAC, 2020)²⁹. The region experienced above-normal rainfall from the March-May short season that contributed to the development of main season crops in many parts of the region. However, the above-normal rainfall also resulted in flooding in parts of the region destroying livelihoods and crops as well as creating conducive conditions breeding of the desert locust.

Most parts of the Southern Africa region are in the dry winter season, except southern parts of South Africa. Similar to the June forecast³⁰, most of the region remains dry in July except southern parts of South Africa projected to receive below-average rainfall. Harvest is complete for the maize season cropping season across the region. The region experienced average yields that are credited to improved rainfall in January and February in parts of the region following below-average and delayed rainfall at the beginning of the season. The food availability in areas that were affected by the prolonged season dry spell is below average.

The July rainfall forecasts for the West Africa region indicate above-normal rainfall for most parts of the focus countries except the southern parts of the region. Planting activities are continuing in the southern parts of the region under favourable conditions, and southern parts of the Sahel started planting with timely rainfall onset in May (GEOGLAM, 2020). Despite above-normal rainfall across the region, multiple shocks that include: climate variability, the COVID-19 pandemic, armed conflict and insecurity in parts of the region, risk of desert locust invasion from East Africa threaten the potential good seasonal harvests³¹.

The interaction of the rainfall extremes, desert locust, COVID-19 pandemic and other perennial development challenges experienced in parts of the continent exacerbates the vulnerability of many to food and nutrition insecurity. Food trade and humanitarian efforts remain essential to ensure food is made available to areas of need in the areas that experienced below-average yields and also those experiencing food shortages.

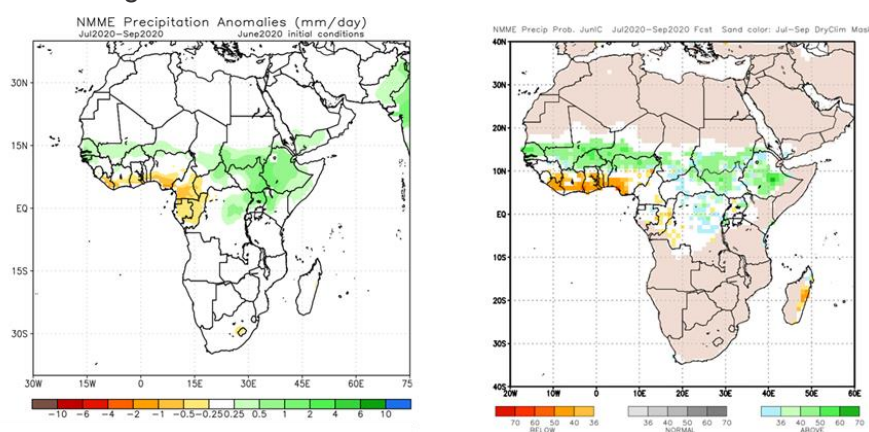


Figure 9: North American Multi-Model Ensemble (NMME) rainfall forecast for July 2020, based on June 2020 initial conditions³²

²⁹ ICPAC. 2020. East Africa Crop Monitor. Bulletin No. 7: Season Update, June 2020

³⁰ AGRA. 2020. AGRA Food Security Monitor. No 3 May 2020. Alliance for the Green Revolution in Africa, Nairobi, Kenya.

³¹ AGRA. 2020. AGRA Food Security Monitor. No 3 May 2020. Alliance for the Green Revolution in Africa, Nairobi, Kenya.

³² The image on the left shows the probabilistic forecast and the right image shows the standardized forecast 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

Desert Locust Outbreak and Impacts on Food Security and Trade

The June desert locust situation updates from FAO indicate that second-generation swarms are forming in parts of the region, particularly in north-western Kenya. The desert locust projections indicate migration to Ethiopia and Sudan northwards further to towards West Africa (Figure 11)³⁴. The ICPAC desert locust movement prediction indicated a high risk of desert locust on crops and rangelands as a result of increased chances of swarms migrating. The heavy rainfall received in East Africa provided conducive conditions for breeding and formation of new swarms of the desert locust. Figure 12 presents the



Figure 10: The locust invasion in Embu, Kenya

Source: Farm Africa courtesy of Murimi, Embu³³

estimates of cropland impacted by desert locust based on the Gro Intelligence's 2020 Desert Locust Impact model. The Gro's 2020 Desert Locust Impact Model estimates compare the season's change in NDVI to the historical average change to identify the pixels affected by the desert locust. Estimates for Sudan (18.8 million ha) and Ethiopia (14.4 million ha) show that they have the most impacted cropland followed by South Sudan (9.5 million ha), Uganda (8.4 million ha), Kenya (5.7 million ha), Somalia (3.3 million ha) and Eritrea (0.97 million ha). As discussed in Section 2 above, the desert locust upsurge in East Africa combines with other shocks that include climate variability and extremes and the COVID-19 pandemic and containment measures resulting in severe impacts in food systems. The impacts on food systems affect the availability and quality of food, resulting in an increased number of people in higher conditions of food and nutrition insecurity. Movement of food from surplus areas to deficit regions remains a priority either through food trade and or humanitarian means to address acute food and nutrition challenges attributed to some of these risk factors.

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

³³ <https://www.farmafrica.org/latest/news/post/934-desert-locust-infestation-threatens-harvests-across-eastern-africa>. Accessed 24 June 2020

³⁴ FAO (2020). Desert Locust situation update 13 June 2020. Food and Agriculture Organisation of the United Nations, Rome, Italy.

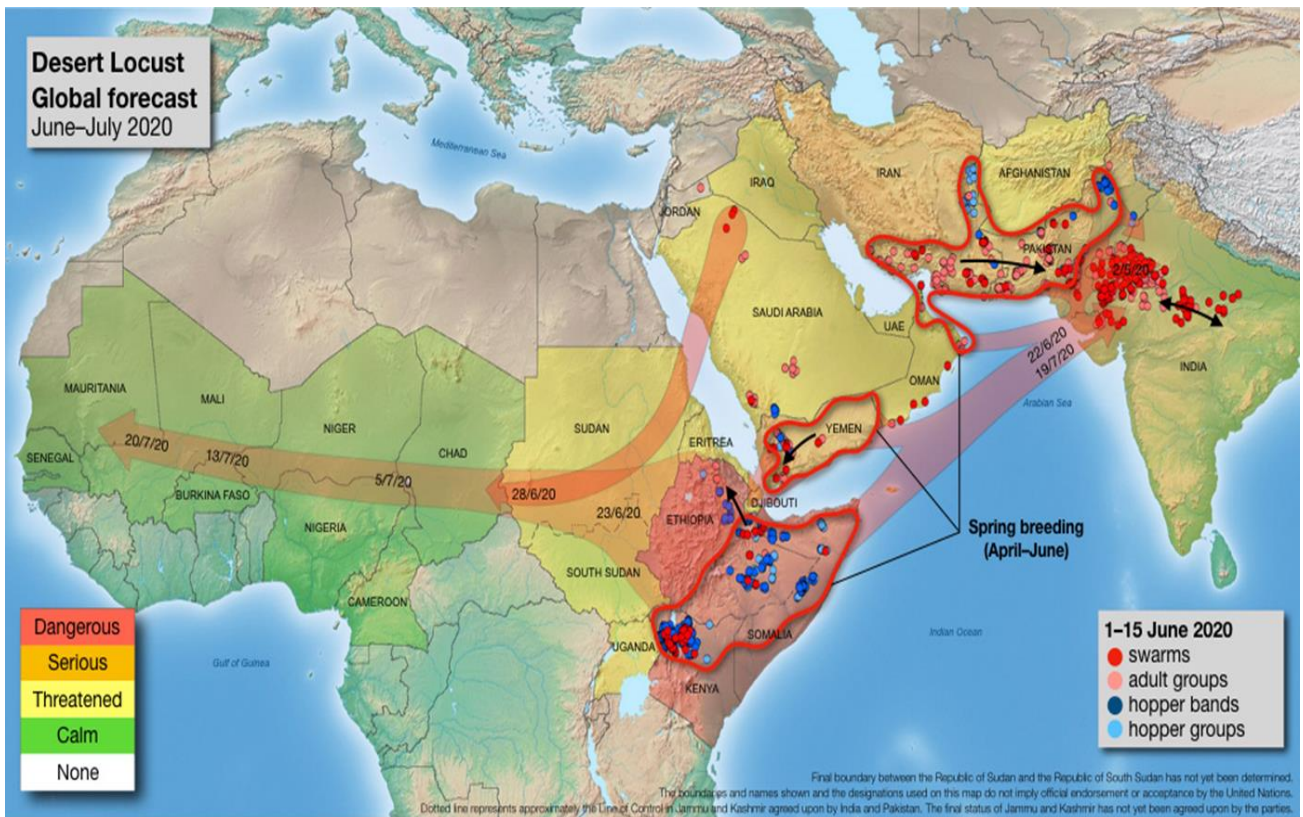


Figure 11: Situation, threat and forecast of desert locust in East Africa³⁵

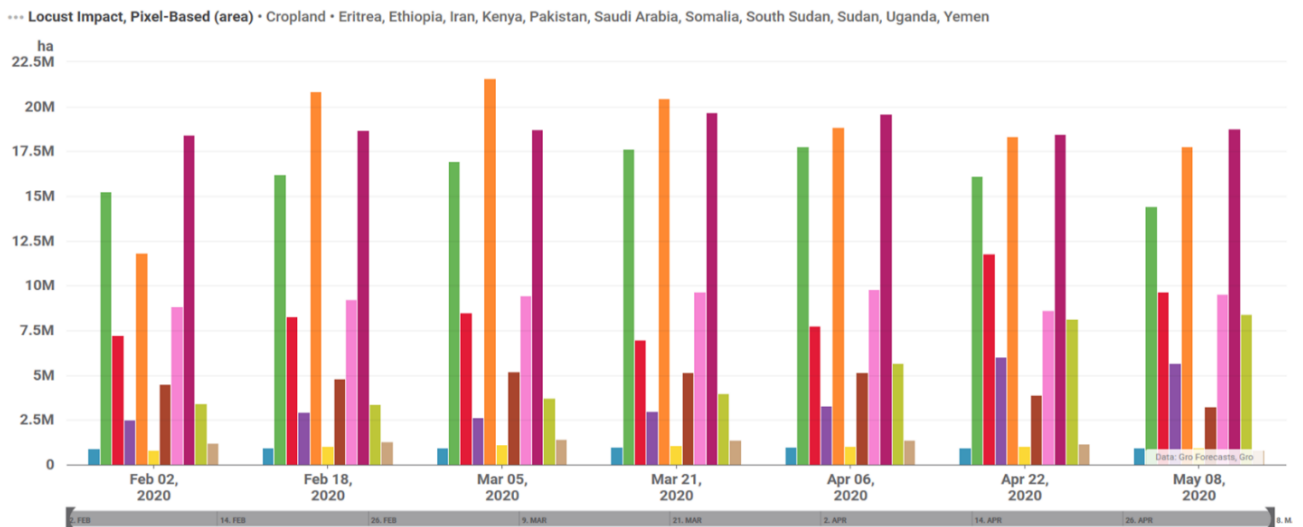


Figure 12: Locust Impacted Cropland Area (Pixel-level Analysis) in East Africa³⁶

³⁵ <http://www.fao.org/ag/locusts/common/ecg/75/en/200616forecast.jpg>. Accessed 24 June 2020

³⁶ <https://app.gro-intelligence.com/displays/WdKQlqKq>. Accessed 10 June 2020



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