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Summary

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

The recently held AGRF summit emphasised the role of **data and market information systems** in enhancing trade and improving food security across the continent. Discussions stressed the need to generate **data** and information that can be translated in a manner that can be understood and "actioned" by various end-users including smallholder farmers, private sector players and governments for decision making. To achieve this, there was consensus among participants that unlocking actionable data opportunities requires countries and regional bodies to invest significantly in data systems which build on existing data that is already available but may otherwise not be accessible due to the lack of infrastructure for extraction, analysis and dissemination. There was also consensus on the need to build the capacity of various stakeholders to be able to analyse the data.

Our monthly Food Security Monitor is one way that AGRA makes data available to key stakeholders to underpin this kind of evidence-based decision-making. Highlights from the September Food Security Monitor are summarized below.

The food security outlook in AGRA focus countries remains unchanged from August with key hunger hotspots in five countries. The number of countries with very high levels of hunger remained unchanged from the previous month at five with Burkina Faso, Mali, Niger, South Sudan, and Zimbabwe as places in sub-Saharan Africa where more than 50% of the countries' total population did not have sufficient food for consumption during the month.

Cross border transit remains slowed, but relief may be in sight as tracking systems -especially in East Africa – come online. In East Africa, cross border trade activities continue to operate as normal across the region, with COVID-19 tests remaining in place at all border posts. Land borders remain closed to individual travellers except for goods and cargo in Rwanda. This continues to affect small-scale cross border trade activities between the country and its neighbouring countries. The situation remains slowed due to COVID-19 in West and Southern Africa, but no new cross-border measures were instituted in these geographies over the past month.

COVID-19 cases increase across the continent – but at a slower rate – as recoveries increase steadily. Across the continent, the number of COVID-19 cases increased by 19% between 28 August and 28 September compared to 41% between 28 July and 28 August. On the other hand, the percentage of confirmed recoveries also continues to increase steadily, rising from 78% between 28 July and 28 August to 83% between 28 August and 28 September. The improving situation has seen countries across the continent, increasingly opening the economic sectors that were severely affected by the COVID-19 containment measures.

Forecasts for October which show below-average rainfall are especially worrying for parts of Southern and Eastern Africa. The rainfall forecasts for October show that most parts of East, Southern and West Africa will receive below-average rainfall. The projections are worrying for areas where the new cropping season starts from October/November, especially in Southern Africa and in parts of East Africa that experience dual seasons. The implication could be a delayed start of the planting season that could end up affecting expected harvests - adversely impacting food and nutrition security. A few areas such as parts of South Sudan and coastal parts of West Africa are projected to receive above-average rainfall in the same month.

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 the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Rwanda, Tanzania and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe) and West Africa (Burkina Faso, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Outlook

The number of countries with very high levels of hunger remained unchanged from the previous month at five with the same countries - Burkina Faso, Mali, Niger, South Sudan and Zimbabwe (Figure 1) – persisting as hunger hotspots where more than 50% of the countries' total population did not have sufficient food for consumption during the month.

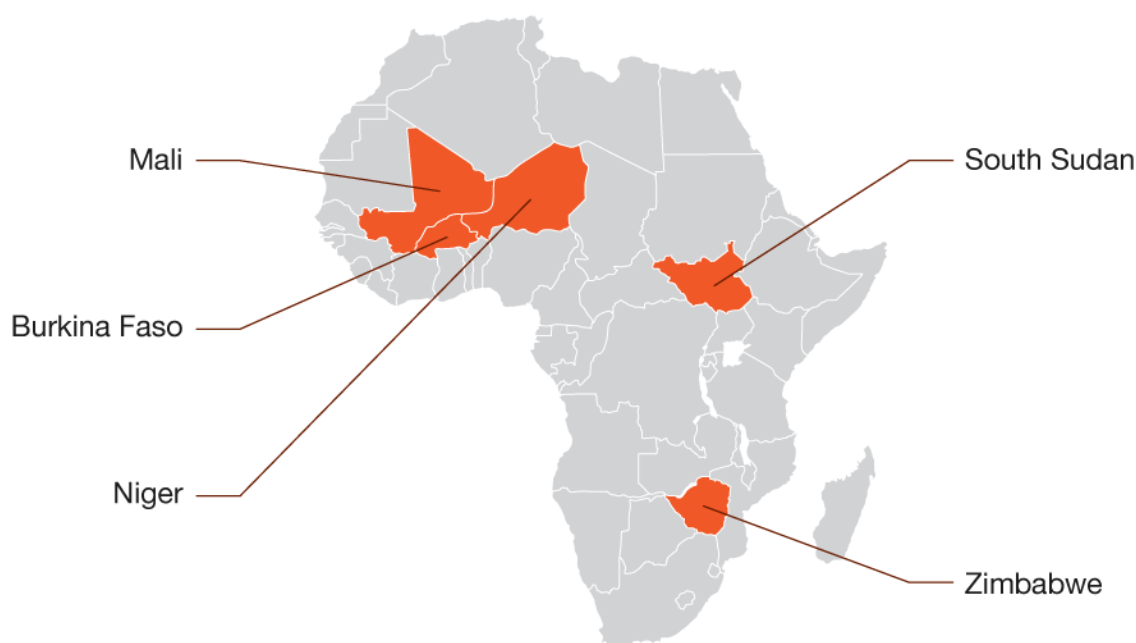


Figure 1: Early warning analysis of acute food insecurity hotspots

Source: Own analysis based on data from WFP (2020)

The food security crisis in **South Sudan** continues to be worsened by the poor economic performance, which has resulted in a decrease in the country's national currency which has depreciated significantly against the US dollar. This has resulted in an increase in food prices which is impacting negatively on food security in the country. The continued political challenges in the country have also been affecting the implementation of economic reform plans such as the Revitalized Agreement for the Resolution of Conflict in South Sudan. Continued conflicts in **Burkina Faso, Mali and Niger**, continue to disrupt livelihoods and worsen the food security situations in these countries. In **Zimbabwe**, the economic downturn, below-average cereal harvests, high food prices and livelihood losses due to the COVID-19 pandemic continue to worsen the food security situation in the country.

East Africa

The prevalence of food insecurity remained unchanged across most of the focus countries in East Africa (Figure 2) except in Uganda where the situation improved as the country moved from a high to a moderately high situation (28 percent). The food insecurity situation in South Sudan remained very high (55 percent). Rwanda and Ethiopia also continued to experience moderately high food insecurity with a prevalence of 27 percent and 21 percent, respectively. The situation in Tanzania remained low at 8 percent.

The agricultural season in East Africa is varied across different countries. Major grains in Ethiopia and South Sudan are currently maturing and are not yet available for harvest, which could also contribute to the shortage of food for consumption in the country. In Kenya, Tanzania and Uganda, harvesting of the main season cereals was recently completed which potentially could have contributed to improved security outcomes recorded in some of the countries over the past month. In Rwanda, land preparation for the secondary season cereal crops is currently underway as such food supplies at this period of the year are generally low.

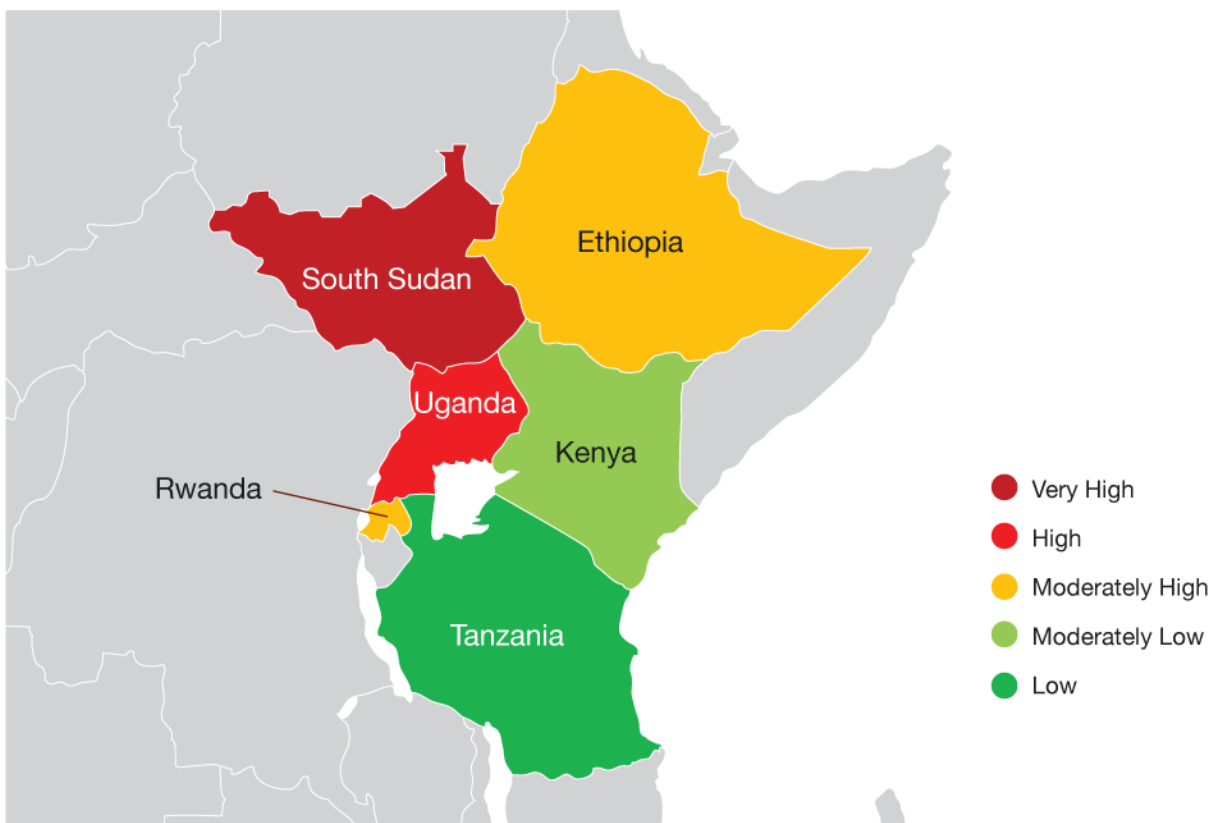






Figure 2: Prevalence of insufficient food consumption in selected East African countries, September 2020¹

The number of people with insufficient food across selected focus countries in East Africa stood at 57.9 million in September. This figure is 13.1 per cent lower than August, which indicates that the food security situation in the region continues to improve. Across the different countries, Ethiopia, Kenya and Uganda recorded a decrease in the number of people with insufficient food consumption. In Rwanda and Sudan, the situation remained stable while in Tanzania, there was an increase of 4.9% in the number of people with insufficient food consumption.

¹ <https://hungermap.wfp.org/> Accessed 28 September 2020.

Table 1: Number of people facing a food consumption crisis in selected East African Countries (September 2020)²

Country	Population ³	People with insufficient food consumption	% change from 1 month ago	Acute malnutrition (of children under 5)	Chronic malnutrition of children under 5
Ethiopia	109.2m	23.4m (21.4%)	(30.3%) 	7.2%	36.8%
Kenya	51.4m	8.9m (17.3%)	(3.4%) 	4.2%	26.2%
Rwanda	12.3m	3.3m (26.8%)	No change	2.3%	38.3%
South Sudan	11.0m	6.0m (54.5%)	No Change	22.7%	31.3%
Tanzania	56.3m	4.3m (7.6%)	4.9% 	3.5%	31.8%
Uganda	42.7m	12.0m (28.1%)	(6.6%) 	3.5%	28.9%

Southern Africa

The prevalence of food insecurity across selected focus Southern African countries remained unchanged in Mozambique, Zambia and Zimbabwe where the countries experienced respectively moderately high (27 percent), moderately high (28.7 percent) and very high (55 percent) food insecurity situations over the past month. The situation in Malawi deteriorated with the country moving from a low-level situation of food insecurity to a moderately low level of food insecurity (11 percent).

As Southern Africa continues to move further away from its main harvesting season and looks toward the main planting season, reduction in food supplies from the main harvest is increasingly becoming evident, particularly in Malawi where the number of people with insufficient food for consumption increased significantly over the past month. This demonstrates the need for countries to open up their borders to allow imports to flow in and increase food supplies to avoid the food crisis situation from worsening.

² <https://hungermap.wfp.org/> Accessed 28 September 2020.

³ Total population counts all residents, regardless of legal status or citizenship (the values shown are mid-year estimates) Data source: World Bank

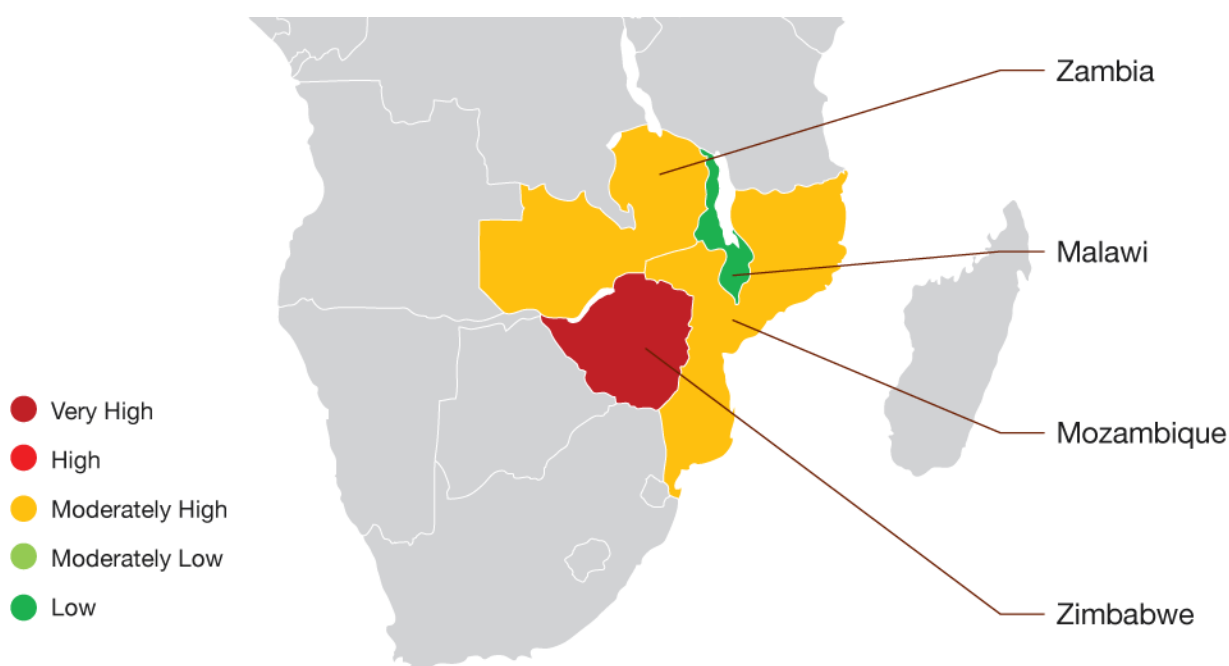


Figure 3: Prevalence of insufficient food consumption in selected Southern Africa countries, September 2020⁴

The number of people with insufficient food consumption across all the selected countries stood at 22.9 million for the month of September. This figure is 0.4 per cent higher than August 2020. All of the countries except Malawi recorded a decrease in the number of people with insufficient food consumption. The number of people with insufficient food consumption in Malawi increased significantly by 35 per cent over the past month.

Table 2: Number of people facing food consumption crisis in selected Southern African Countries (September 2020)⁵

Country	Population	People with insufficient food consumption	% change from 1 month ago	Acute malnutrition (of children under 5)	Chronic malnutrition of children under 5
Malawi	18.1m	2.0m (11.0%)	35.3% ↑	1.3%	39.0%
Mozambique	29.5m	8.0m (27.1%)	2.0% ↓	4.4%	42.3%
Zambia	17.4m	5.0m (28.7%)	2.4% ↓	4.2%	34.6%
Zimbabwe	14.4m	7.9m (54.9%)	0.1% ↓	2.9%	23.5%

West Africa

The prevalence of food insecurity in West Africa remained unchanged in Mali, Niger and Burkina Faso as the countries continued to experience very high food insecurity situations. The situation in Togo and Ghana also remained unchanged at moderately high and moderately low food insecurity situations, respectively. Improvements in food security situations were recorded in Nigeria where the country moved from a moderately high to a moderately low situation (15 per cent). Food security

⁴ <https://hungermap.wfp.org/> Accessed 28 September 2020.

⁵ <https://hungermap.wfp.org/> Accessed 28 September 2020.

situations worsened in Cote d'Ivoire where the country moved from a moderately low level to a moderately high (22 percent) food insecurity situation over the past month.

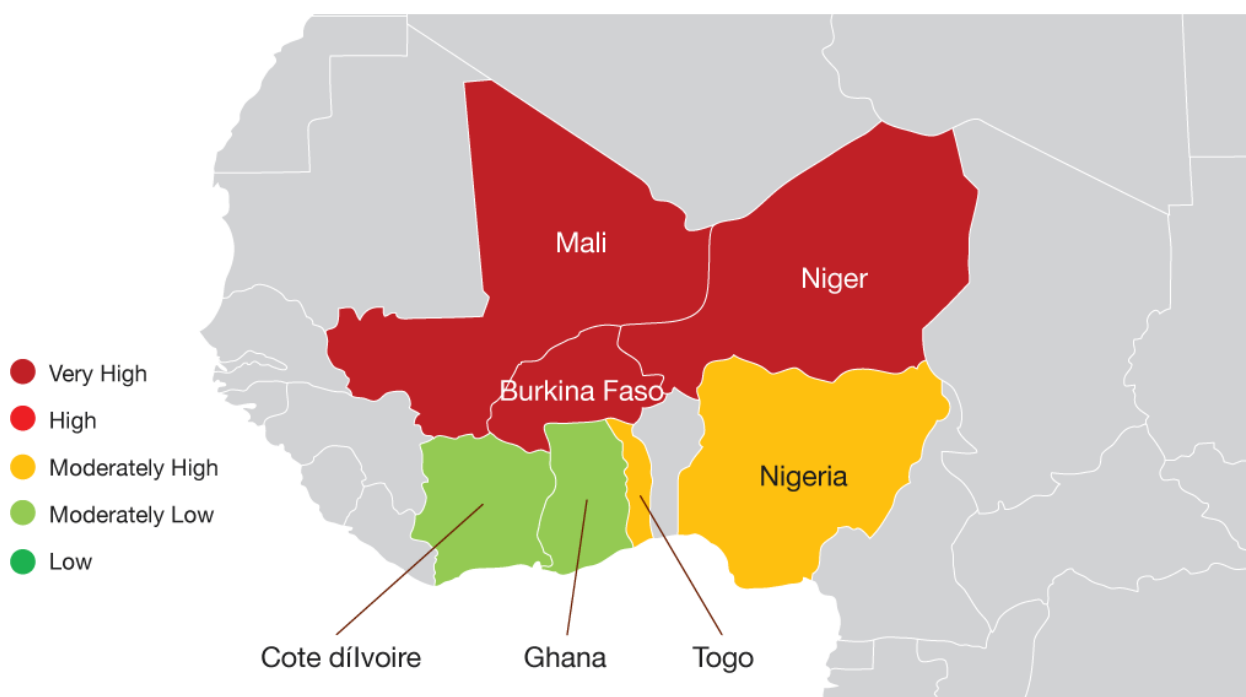


Figure 4: Prevalence of insufficient food consumption in selected West Africa countries, September 2020⁶

The number of people with insufficient food consumption across all the selected countries stood at 78.4 million for the month of September. This figure is 14.2 percent lower than for August. The improved food security situation can be ascribed to the ongoing main harvest season across most of the coastal countries in the region, which is increasing food supplies in these countries. Across the individual countries, increases in the number of people with insufficient food consumption were recorded in Cote d'Ivoire, Ghana, Mali and Togo. In contrast, Burkina Faso, Niger and Nigeria recorded decreases over the past month.

Table 3: Number of people facing food consumption crisis in selected Southern African Countries (September 2020)⁷

Country	Population	People with insufficient food consumption	% change from 1 month ago	Acute malnutrition (of children under 5)	Chronic malnutrition of children under 5
Burkina Faso	19.8m	11.1m (56.1%)	6.8% ↓	8.4%	24.9%
Cote d'Ivoire	25.1m	5.4m (21.5%)	11.0% ↑	6.1%	21.6%
Ghana	29.8m	5.4m (18.1%)	1.9% ↑	6.8%	17.5%
Mali	19.1m	11.3m (59.2%)	15.4% ↑	9.0%	26.9%
Niger	22.4m	12.0m (53.6%)	3.6% ↓	14.1%	48.5%
Nigeria	202.8m	31.1m (15.3%)	27.2% ↓	6.8%	36.8%
Togo	7.9m	2.1m (26.6%)	10.5% ↑	5.7%	23.8%

⁶ <https://fews.net/west-africa> Accessed 28 September 2020

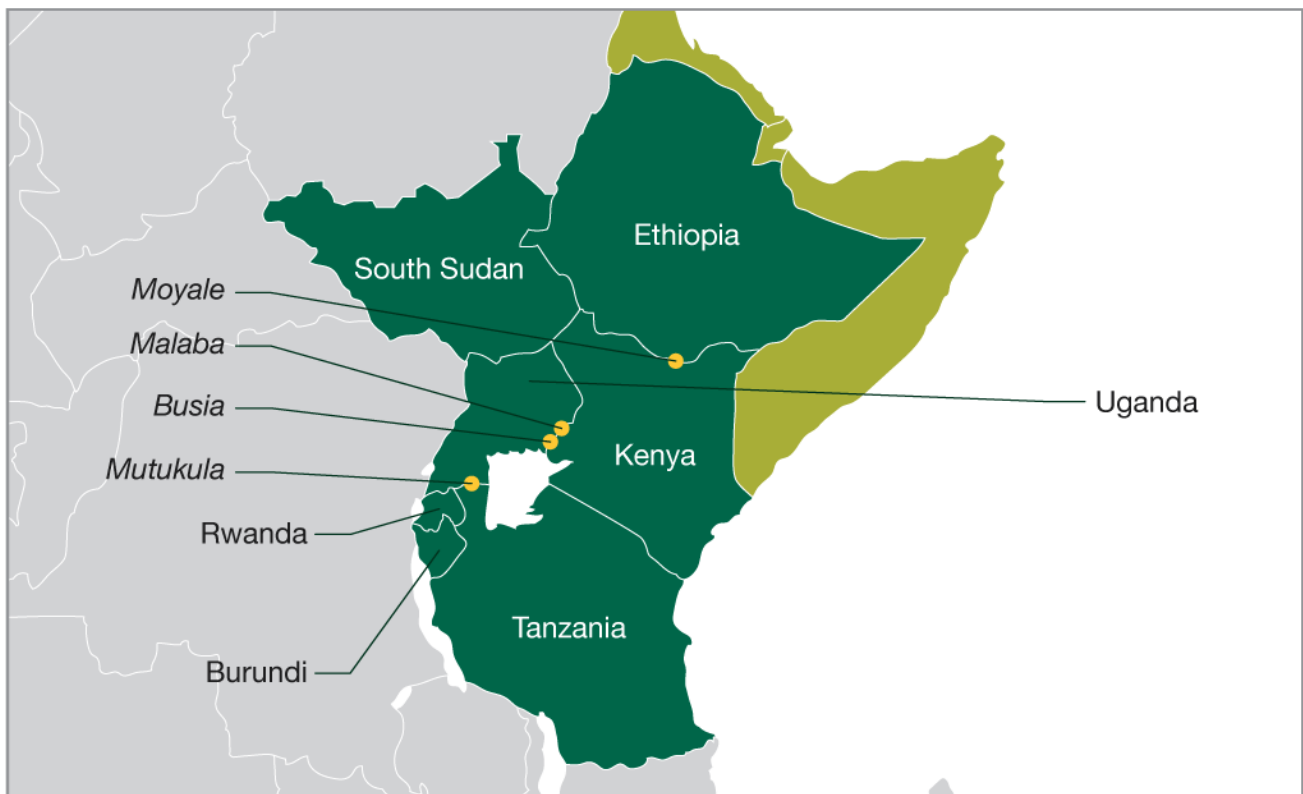
⁷ <https://hungermap.wfp.org/> Accessed 28 September 2020

Cross-Border Trade Updates

East Africa

Cross border trade activities continue to operate as normal across the region with requirements for COVID-19 tests remaining in place at all border posts. In Rwanda, land borders remain closed to individual travellers except for goods and cargo. This continues to affect small-scale cross border trade activities between the country and its neighbours. The launching of the EAC Regional Electronic Cargo and Driver Tracking System (RECDTS) on the 8th of September at various border points has gradually helped to unlock truck delays across borders. The Ugandan government introduced a US\$65 testing fee on the 1st of September which is compulsory for truck drivers and serves as a revenue stream to enable the Ministry of Health to acquire more kits for continued access to testing services. This move is expected to increase business costs which are likely going to lead to an increase in food prices in the country. Specific measures that were instituted at various border points in the region over the past month are provided below.

Figure 5: East Africa Cross border trade updates September 2020⁸



⁸ Food Security & Nutrition Working Group (September 2020)

TANZANIA/UGANDA

- Tight controls remain in place at the Mutukula border as mass-testing for COVID-19 for all trucks entering Uganda from Tanzania is still ongoing.
- Tanzanian truck drivers entering Uganda are subject to two weeks quarantine.

TANZANIA/RWANDA

- Rwanda refuses to accept Covid-19 test certificates from Tanzania and continues to deny Tanzanian truck drivers access to cross Rwandan borders.
- This is causing delays and increasing costs of doing business.

KENYA/ETHIOPIA

- Delays at the Kenya-Ethiopia border at Moyale have been improved recently as the quarantine period for truck drivers has been reduced from 14 days upon entry to 3 days if a test is returned as being negative.
- However, this border crossing is still notoriously costly and difficult to navigate, limiting opportunities for large quantities of trade.

UGANDA/KENYA

- Truck drivers at the border points have entered a strike following a directive by the Government of Uganda to have the drivers pay US\$65 for testing which is compulsory at border points.
- Queues of up to 25km have been observed at Busia border while a 50 km traffic snarl up has built up, stretching from Malaba to Manyanja market.
- Kenya through the EAC ministry has initiated diplomatic talks to solve the cargo standoff at the Busia and Malaba borders.

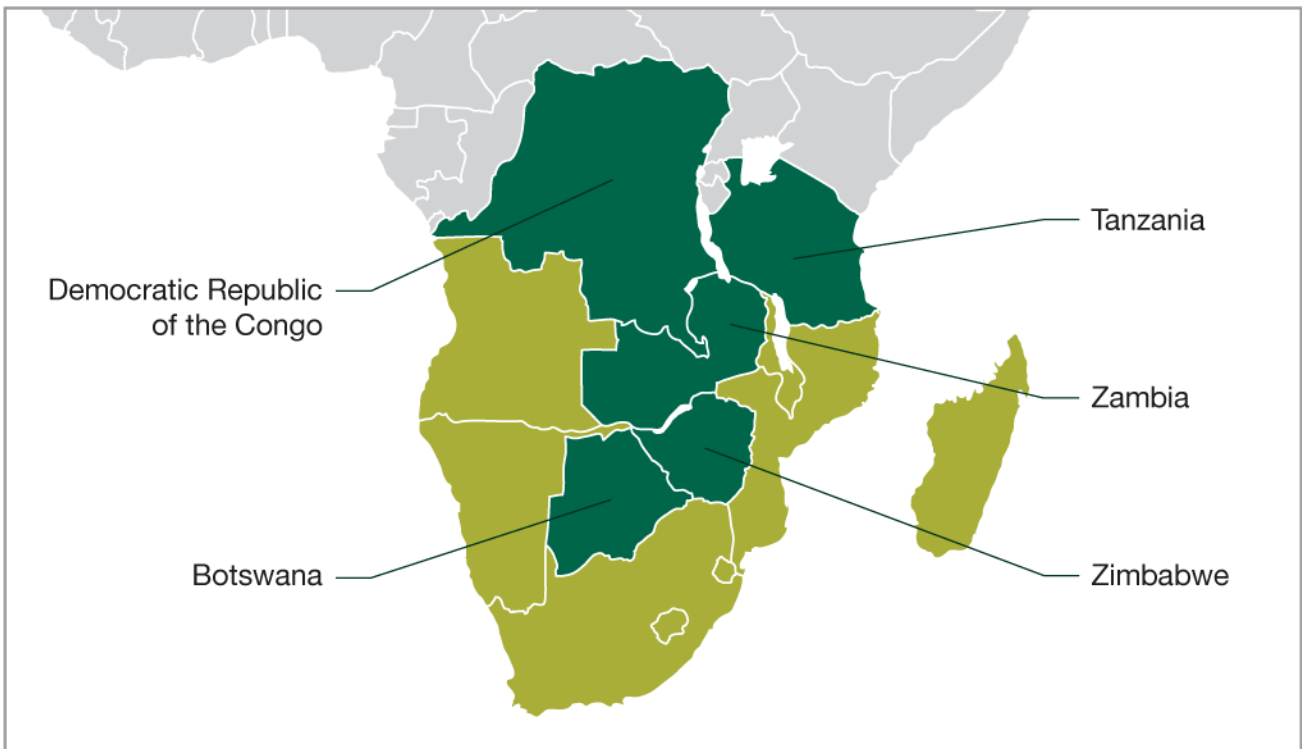
KENYA/TANZANIA

- Truck drivers crossing the borders are required to have COVID-19 test certificates proving they have tested negative for the virus.
- However, there are reports that Kenya has reinstated the 14-day mandatory quarantine for Tanzanian drivers crossing into Kenya.
- This has led to congestion of trucks at the borders, which in turn has exacerbated rent-seeking behaviours by border officials taking advantage of traders keen to expedite border clearance.

Southern Africa

There were no new cross-border measures instituted in Southern Africa over the past month. However, cross border trade activities in Southern Africa are expected to increase going forward following the announcement by the South African government that it will be opening up its borders to business and leisure travellers, subject to various health regulations, from the 1st of October. Food remittances from South Africa into the region, mostly to Zimbabwe are expected to increase as the borders open. This will also lead to an increase in household incomes for the vast number of people that rely on these informal cross-border food trade activities. Ultimately this is expected to improve security and livelihoods across the region. Some of the cross-border trade measures that remain in place are presented below.

Figure 6: Southern Africa Cross Border Trade Updates September 2020



BOTSWANA/ZAMBIA

- Complaints about the inconsistent procedures used to calculate the toll used by the Botswana Unified Revenue Service remain in place.
- This uncertainty is creating challenges for truckers who report changes in the toll fees charged at the border which are increasing business costs.

ZAMBIA/TANZANIA

- Border operations are relatively normal.
- Simple checks for COVID-19 (temperature checks) are the only additional control measure instituted at the borders.
- Truck drivers and their crew are required to have COVID-19 test certificates to be allowed to cross the border.

BOTSWANA/ZIMBABWE

- Botswana continues to restrict the importation of baked goods derived from grain such as pastries cookies, muffins which is meant to protect domestic producers.

ZAMBIA/DRC

- The maize export ban remains in place. This has resulted in an increase in informal exports to the DRC.

West Africa

No new cross border trade measures were reported or instituted across the West Africa region over the past month. COVID-19 tests continue at various border points with delays in the movement of goods remaining in place due to these tests. Trade restrictions in Nigeria which have limited maize import licenses to four companies is likely to sustain the high food prices in the country.

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

The summary of COVID-19 cases and government measures in selected African countries as of 28 September 2020 is presented in the figure below. Across the continent, the rate of increase of confirmed cases continues to decline. The number of cases increased by 19% between 28 August and 28 September as compared to a 41% increase between 28 July and 28 August. The percentage of confirmed recoveries also continues to increase steadily, rising from 78% between 28 July and 28 August to 83% between 28 August and 28 September. The improving situation has seen countries across the continent, increasingly opening the economic sectors that were severely affected by the COVID-19 containment measures. However, targeted efforts are required to build the resilience of vulnerable populations which were severely impacted by the containment measures, especially smallholder farmers, women and youth, and SMEs.

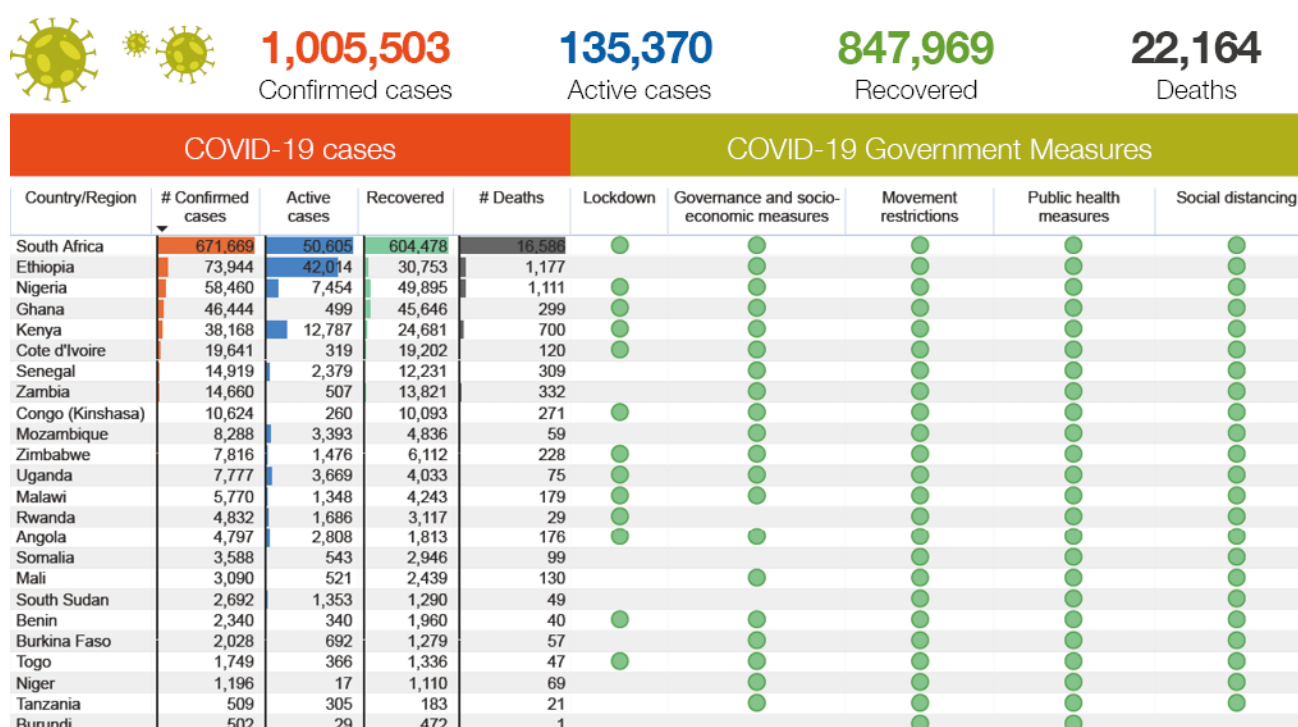


Figure 7: Summary of coronavirus (COVID-19) cases and government measures in selected African countries

Source: Own construction based on data from Johns Hopkins University

Agricultural Commodities' Price Monitoring

East Africa

The latest maize prices in Kenya, Rwanda, Tanzania and Uganda were lower than prices recorded in the previous three and six months - as well as one year (Table 4). The increased supply from imports through the government directive to import 4 million 90kg bags of maize at the peak of the pandemic contributed to the decline in prices in Kenya. In Rwanda, Tanzania and Uganda, increased supply from recent harvests (June – August) have contributed to low prices in August and September compared to the previous three and six months and one year. However, prices in South Sudan remained high compared to the periods as noted above, due to supply constraints, and despite the July to August harvests. The projections for prices in Rwanda, and Tanzania present mixed changes; however, the overall trend is an increase in future prices compared to the August and September prices.

Table 4: Changes in maize prices in selected East African Countries⁹

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Ethiopia	Maize (white)	Addis Ababa, Ethiopian Birr/KG****	10	0.91 ▲	-0.20 ▾	-5.94 ▾	18.97 ☒		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG****	11	6.91 ▲	-2.33 ▾	-1.74 ▾	35.82 ☒		
Ethiopia	Maize (white)	Mekele, Ethiopian Birr/KG****	11	-10.20 ▾	-2.91 ▾	-4.35 ▾	44.74 ☒		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	28	-9.28 ▾	-18.74 ▾	-9.80 ▾	-16.57 ▾		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	31	-7.08 ▾	-11.77 ▾	-2.58 ▾	-16.10 ▾		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	28	-13.77 ▾	-24.95 ▾	-11.27 ▾	-17.04 ▾		
Rwanda	Maize (white)	Kabuga, Retail, RWF/MT*	213	-15.00 ▾	-15.00 ▾	-15.00 ▾	-38.11 ▾	5.91 ▲	7.41 ▲
Rwanda	Maize (white)	Kigali, Retail, RWF/MT**	223	-3.57 ▾	-14.85 ▾	-45.18 ▾	-36.20 ▾	-6.28 ▾	21.35 ☒
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/MT	340	17.24 ☒	23.39 ☒	13.33 ▲	-9.74 ▾	17.68 ☒	-1.34 ▾
Rwanda	Maize (white)	Mugera, Retail, RWF/MT	263	6.28 ▲	11.26 ▲	12.06 ▲	-23.67 ▾	20.31 ☒	-24.97 ▾
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	270	0.62 ▲	4.85 ▲	11.34 ▲	-10.00 ▾	23.40 ☒	-14.04 ▾
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/kg*	292	29.57 ☒	80.08 ☒	191.72 ☒	178.95 ☒		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/kg*	207	-1.63 ▾	-9.16 ▾	57.39 ☒	62.32 ☒		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/kg*	283	9.40 ▲	32.75 ☒	52.15 ☒	103.08 ☒		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/kg*	157	0.00 ●	0.00 ●	10.00 ▲	-0.90 ▾		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG*	53,417	-8.98 ▾	-4.49 ▾	-34.92 ▾	-25.95 ▾	-3.07 ▾	10.89 ▲
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG*	61,208	1.96 ▲	21.55 ☒	-20.67 ▾	-3.85 ▾	13.68 ▲	44.54 ☒
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG*	57,850	-4.75 ▾	13.91 ▲	-36.31 ▾	-15.94 ▾	9.37 ▲	15.22 ☒
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG*	56,879	-1.46 ▾	3.88 ▲	-28.23 ▾	-12.51 ▾	25.41 ☒	21.11 ☒
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG*	60,000	-14.29 ▾	-11.11 ▾	-23.81 ▾	-24.49 ▾	-5.23 ▾	7.60 ▲
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	655	14.32 ▲	-36.56 ▾	-37.71 ▾	-28.11 ▾		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	732	14.60 ▲	-18.86 ▾	-23.75 ▾	-19.13 ▾		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	655	20.90 ☒	-28.64 ▾	-25.58 ▾	-6.49 ▾		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	601	16.41 ☒	-36.87 ▾	-33.03 ▾	-20.67 ▾		

Note: Last price is for August 2020, *July, **June, ***April and ****March

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%), ▾ = low decrease (0-5%), ▾ = moderate decrease (5-15%), ▾ = high decrease (>15%)

⁹ Author's construction based on data from WFP (2020) and FAO (2020)

The prices for bean in Rwanda, Tanzania and Uganda show increases ranging from low to high in the previous one, three and six months as well as one year (Table 5). Projections over the next three months to one year show a similar trend except in a few markets in Rwanda. Bean is an essential nutritional crop in the region, and rising prices negatively impact on food and nutrition security of the vulnerable populations that are also facing multiple shocks.

Table 5: Changes in bean prices in selected East African Countries¹⁰

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Rwanda	Bean (dry)	Kabuga, Retail, RWF/KG*	580	3.11 ▲	28.89 ⊗	27.01 ⊗	45.73 ⊗	28.21 ⊗	7.31 ▲
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	717	10.26 ▲	17.27 ⊗	19.44 ⊗	43.33 ⊗	6.03 ▲	-2.79 ▼
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	783	18.99 ⊗	35.84 ⊗	27.03 ⊗	70.29 ⊗	-21.16 ▼	-15.82 ▼
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	800	31.51 ⊗	33.33 ⊗	19.83 ⊗	65.29 ⊗	-11.30 ▼	-12.64 ▼
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG*	155,000	-3.13 ▼	-5.03 ▼	-1.33 ▼	4.89 ▲	8.41 ▲	8.44 ▲
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG*	174,750	2.23 ▲	-10.61 ▼	-7.78 ▼	0.38 ▲	17.40 ⊗	14.23 ▲
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG*	185,000	3.14 ▲	-4.78 ▼	4.09 ▲	31.32 ⊗	29.21 ⊗	17.03 ⊗
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG*	175,000	-6.04 ▼	-10.26 ▼	-33.96 ▼	0.65 ▲	11.94 ▲	24.67 ⊗
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG*	250,000	1.35 ▲	-7.41 ▼	10.13 ▲	38.89 ⊗	-1.06 ▼	8.19 ▲
Uganda	Bean (dry)	Kampala, Wholesale, USH/KG	2,891	-0.21 ▼	22.97 ⊗	-11.43 ▼	-0.52 ▼		
Uganda	Bean (dry)	Lira, Wholesale, USH/KG	2,755	5.78 ▲	25.89 ⊗	-1.51 ▼	14.51 ▲		

Note: Last price is for August 2020, *July, **June, ***April and ****March

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ⊗ = high increase (>15%), ▼ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

Sorghum prices in selected markets in Ethiopia, Rwanda and South Sudan indicate mixed changes in the previous 1, 3 and 6 months as well as one year (Table 6). The recent sorghum (B) harvests in Rwanda contributed to increases in supplies in some markets and observed and projected decline in prices. Overall, current prices remain relatively higher compared to the above previous periods. Despite sorghum being adaptable to harsh agro-climatic conditions and nutritionally important crop, production remains relatively low compared to other staples. Low supplies contribute to pushing prices up affecting accessibility to this vital crop, especially among the poor.

Table 6: Changes in sorghum prices in selected East African Countries¹¹

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Ethiopia	Sorghum (red)	Addis Ababa, Ethiopian Birr/KG****	12	14.14 ▲	3.82 ▲	-7.44 ▼	26.72 ⊗		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG****	20	14.08 ▲	13.55 ▲	-1.71 ▼	25.19 ⊗		
Rwanda	Sorghum	Kabuga, Retail, RWF/MT*	413	5.77 ▲	10.00 ▲	-11.61 ▼	17.86 ⊗	-5.11 ▼	-6.09 ▼
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/MT*	440	-6.68 ▼	1.54 ▲	-2.22 ▼	10.00 ▲	-3.26 ▼	-6.77 ▼
Rwanda	Sorghum	Mugera, Retail, RWF/MT*	280	-9.68 ▼	-26.32 ▼	-30.00 ▼	-22.22 ▼	15.62 ⊗	10.76 ▲
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG*	300	0.00 ●	-25.00 ▼	-23.08 ▼	-8.25 ▼	19.71 ⊗	18.63 ⊗
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/kg*	362	35.94 ⊗	118.83 ⊗	268.33 ⊗	249.03 ⊗		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/kg*	205	-1.10 ▼	-6.39 ▼	44.47 ⊗	62.08 ⊗		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/kg*	223	15.56 ⊗	32.65 ⊗	30.00 ⊗	56.00 ⊗		
South Sudan	Sorghum	Torit, Retail, South Sudanese Pound/kg*	143	0.00 ●	33.33 ⊗	14.15 ▲	-10.23 ▼		

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ⊗ = high increase (>15%), ▼ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

¹⁰ Author's construction based on data from WFP (2020) and FAO (2020)

¹¹ Author's construction based on data from WFP (2020) and FAO (2020)

Southern Africa

August and September maize prices in selected markets in Malawi, Mozambique and Zambia were relatively lower than prices in the past three and six months (Table 7). However, compared to the previous year, the prices were lower for Malawi and Zambia owing to the good harvest in the main cropping season that ended in March – June. Prices were higher in Mozambique - mainly driven by supply shortages owing to adverse climatic conditions in the previous year that include the devastating cyclones Idai and Jefta as well as a prolonged dry spell in the 2019/2020 cropping season.

Table 7: Changes in maize prices in selected Southern African Countries¹²

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Malawi	Maize (white)	Lilongwe, Retail, MWK/KG*	150	-8.25 ↓	-28.57 ↓	-57.14 ↓	-20.53 ↓		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG*	141	-2.76 ↘	-3.43 ↘	-47.15 ↓	-15.49 ↓		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG*	150	0.67 ▲	-9.66 ↓	-49.87 ↓	-13.63 ↓		
Malawi	Maize (white)	National Average, Retail, MWK/KG*	175	0.92 ▲	4.04 ▲	-48.41 ↓	-19.35 ↓		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG*	199	0.71 ▲	20.70 ⊗	-44.61 ↓	-17.87 ↓		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG*	15	7.38 ↑	28.20 ⊗	-38.38 ↓	-17.22 ↓	1.12 ▲	6.87 ↑
Mozambique	Maize (white)	Chimoio, Retail, MZN/KG**	17	9.73 ↑	49.96 ⊗	-20.35 ↓	42.83 ⊗	29.40 ⊗	35.82 ⊗
Mozambique	Maize (white)	Gorongosa, Retail, MZN/KG***	15	16.80 ⊗	-31.71 ↓	-34.46 ↓	15.07 ⊗	32.63 ⊗	71.57 ⊗
Mozambique	Maize (white)	Maputo, Retail, MZN/KG*	27	0.56 ▲	5.21 ↑	-5.32 ↓	26.22 ⊗	3.18 ▲	22.81 ⊗
Mozambique	Maize (white)	Massinga, Retail, MZN/KG*	22	2.42 ▲	5.45 ↑	-48.80 ↓	21.84 ⊗	11.46 ↑	38.48 ⊗
Mozambique	Maize (white)	Pemba, Retail, MZN/KG*	24	27.51 ⊗	-14.98 ↓	-21.29 ↓	18.08 ⊗	24.04 ⊗	41.50 ⊗
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG***	2	-25.50 ↓	-83.55 ↓	-52.36 ↓	-21.55 ↓	5.86 ↑	18.02 ⊗
Zambia	Maize (white)	Chipata, Retail, ZMW/KG***	3	-9.24 ↓	-43.00 ↓	-36.53 ↓	33.80 ⊗	19.30 ⊗	28.07 ⊗
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG***	3	6.12 ↑	-46.94 ↓	-38.67 ↓	-11.41 ↓	14.92 ↑	34.58 ⊗
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG***	3	-20.71 ↓	-35.96 ↓	-33.40 ↓	-7.24 ↓	-0.60 ↘	12.01 ↑
Zambia	Maize (white)	Mpika, Retail, ZMW/KG***	3	6.80 ↑	-39.88 ↓	-24.79 ↓	13.62 ↑	0.75 ▲	24.72 ⊗

Note: Last price is for August 2020, *July, **June, ***April and ****March

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%), ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

West Africa

Nigeria and Togo experienced moderate (5-15%) to high (>15%) increase in maize August prices compared to the previous one, three and six months as well as one year (Table 8). Prices remained stable in Mali, with some decreases in some markets. Projections for the next three and six months for Cote d'Ivoire and Ghana indicate price decreases in the selected markets with low increases (0-5%) in a few markets.

¹² Author's construction based on data from WFP (2020)

Table 8: Changes in maize prices in selected West African countries¹³

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Cote d'Ivoire	Maize (white)	Korhogo, Retail, XOF/KG*	229	-3.51 ↘	1.63 ▲	30.95 ☒	52.78 ☒	-9.41 ↘	10.57 ▲
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	208	-22.48 ↘	7.39 ▲	-7.41 ↘	-24.24 ↘	2.24 ▲	-1.31 ↘
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG*	169	-4.04 ↘	-3.80 ↘	-1.42 ↘	26.98 ☒	-3.94 ↘	3.24 ▲
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG*	128	18.80 ☒	19.06 ☒	12.74 ▲	18.36 ☒	-22.78 ↘	-23.50 ↘
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG*	194	-9.68 ↘	-0.65 ↘	-8.42 ↘	-17.94 ↘	-36.62 ↘	-23.33 ↘
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG*	115	7.14 ▲	7.14 ▲	15.38 ☒	0.00 ●	-37.85 ↘	-30.91 ↘
Mali	Maize (white)	Ansongo, Retail, XOF/KG*	200	0.00 ●	-14.89 ↘	0.00 ●	-20.00 ↘	-4.78 ↘	0.61 ▲
Mali	Maize (white)	Badalabougou, Retail, XOF/KG*	169	0.00 ●	-15.50 ↘	4.32 ▲	-3.43 ↘	-9.72 ↘	-3.88 ↘
Mali	Maize (white)	Faladié, Retail, XOF/KG*	181	3.43 ▲	3.43 ▲	7.74 ▲	3.43 ▲	-14.98 ↘	-11.22 ↘
Mali	Maize (white)	Gao, Retail, XOF/KG*	225	0.00 ●	-5.06 ↘	0.00 ●	0.00 ●	-3.74 ↘	-6.43 ↘
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG*	200	-2.44 ↘	0.00 ●	0.00 ●	0.00 ●	3.78 ▲	4.61 ▲
Mali	Maize (white)	Niaréla, Retail, XOF/KG*	175	0.00 ●	0.00 ●	16.67 ☒	-3.31 ↘	0.45 ▲	0.43 ▲
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/kg**	187	10.67 ▲	49.40 ☒	86.75 ☒	90.56 ☒		
Nigeria	Maize (white)	Kano, Wholesale, Naira/kg**	155	7.46 ▲	39.93 ☒	72.60 ☒	82.80 ☒		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/kg**	179	27.52 ☒	63.49 ☒	98.23 ☒	132.39 ☒		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/kg**	185	10.61 ▲	38.58 ☒	73.30 ☒	73.55 ☒		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/kg**	166	17.70 ☒	47.78 ☒	85.24 ☒	91.09 ☒		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/kg*	161	7.33 ▲	15.00 ▲	23.85 ☒	19.26 ☒		
Togo	Maize (white)	Anié, Retail, CFA Franc BCEAO/kg*	140	3.70 ▲	12.00 ▲	7.69 ▲	21.74 ☒		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/kg*	153	8.51 ▲	17.69 ☒	15.91 ☒	34.21 ☒		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/kg*	192	13.61 ▲	17.79 ☒	33.33 ☒	22.29 ☒		
Togo	Maize (white)	Kor bongou, Retail, CFA Franc BCEAO/kg*	150	2.74 ▲	11.11 ▲	1.35 ▲	4.17 ▲		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/kg*	197	9.44 ▲	15.88 ☒	27.10 ☒	9.44 ▲		

Note: Last price is for August 2020, *July, **June, ***April and ****March

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%), ↘ = low decrease (0-5%), ↘ = moderate decrease (5-15%), ↘ = high decrease (>15%)

Millet prices across the study countries indicate an increasing trend (Table 9). The prices in Burkina Faso, Niger and Nigeria show moderate and high increases of August/September prices compared to the previous one, three and six months as well as one year. Although prices increased in Mali, the increases remained low, at less than 5%. Most countries in the region will be harvesting millet between the end of September to November and expect good harvests due to above-average rainfall during the past months are projected to push prices down in the next three and six months.

¹³ Author's construction based on data from WFP (2020)

Table 9: Changes in millet prices in selected West African countries¹⁴

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Burkina Faso	Millet	Batié, Retail, XOF/KG*	200	-1.48 ↘	-13.79 ↓	21.95 ⊗	-28.06 ↓	3.24 ▲	-8.78 ↓
Burkina Faso	Millet	Bousse, Retail, XOF/KG*	179	-33.21 ↓	11.18 ↑	9.82 ↑	11.18 ↑	58.03 ⊗	42.09 ⊗
Burkina Faso	Millet	Dori, Retail, XOF/KG*	292	9.36 ↑	18.22 ⊗	23.73 ⊗	32.13 ⊗	-11.64 ↓	-21.48 ↓
Burkina Faso	Millet	Faramana, Retail, XOF/KG*	166	9.93 ↑	13.70 ↑	40.68 ⊗	64.36 ⊗	-4.28 ↘	-12.14 ↓
Burkina Faso	Millet	Gourcy, Retail, XOF/KG*	206	1.48 ▲	13.81 ↑	19.77 ⊗	57.25 ⊗	-1.07 ↘	-9.02 ↓
Burkina Faso	Millet	Ouagadougou (Sankaryare), Retail, XOF/KG*	261	13.97 ↑	21.96 ⊗	21.96 ⊗	24.88 ⊗	-11.36 ↓	-15.64 ↓
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG*	184	15.72 ⊗	24.32 ⊗	49.59 ⊗	52.07 ⊗	-3.90 ↘	3.78 ▲
Burkina Faso	Millet	Titao, Retail, XOF/KG*	156	7.59 ↑	20.93 ⊗	10.64 ↑	2.63 ▲	-8.93 ↓	-21.26 ↓
Mali	Millet	Ansongo, Retail, XOF/KG*	254	8.09 ↑	-4.15 ↘	27.00 ⊗	1.60 ▲	-4.77 ↘	-9.92 ↓
Mali	Millet	Badalabougou, Retail, XOF/KG*	206	3.00 ▲	3.00 ▲	3.00 ▲	3.00 ▲	-1.89 ↘	-1.36 ↘
Mali	Millet	Faladié, Retail, XOF/KG*	206	3.00 ▲	3.00 ▲	3.00 ▲	3.00 ▲	-2.93 ↘	-2.45 ↘
Mali	Millet	Gao, Retail, XOF/KG*	271	8.40 ↑	8.40 ↑	8.40 ↑	15.32 ⊗	-9.92 ↓	-10.96 ↓
Mali	Millet	Kayes Centre, Retail, XOF/KG*	274	9.60 ↑	8.30 ↑	8.73 ↑	9.60 ↑	-6.48 ↓	-8.73 ↓
Mali	Millet	Niarela, Retail, XOF/KG*	225	12.50 ↑	12.50 ↑	28.57 ⊗	12.50 ↑	-14.51 ↓	-13.49 ↓
Niger	Millet	Abalak, Retail, XOF/KG*	364	12.57 ↑	25.38 ⊗	36.69 ⊗	60.18 ⊗	-22.62 ↓	-13.43 ↓
Niger	Millet	Bonkaney, Retail, XOF/KG*	316	19.70 ⊗	35.04 ⊗	34.47 ⊗	32.77 ⊗	-16.57 ↓	-16.06 ↓
Niger	Millet	Goure, Retail, XOF/KG*	352	5.55 ↑	28.94 ⊗	43.09 ⊗	38.58 ⊗	-27.84 ↓	-19.93 ↓
Niger	Millet	Katako, Retail, XOF/KG*	307	10.93 ↑	20.39 ⊗	31.76 ⊗	39.55 ⊗	-16.52 ↓	-11.09 ↓
Nigeria	Millet	Ibadan, Wholesale, Naira/kg**	210	10.38 ↑	44.83 ⊗	87.50 ⊗	70.45 ⊗		
Nigeria	Millet	Kano, Wholesale, Naira/kg**	178	8.67 ↑	40.45 ⊗	95.49 ⊗	102.25 ⊗		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/kg**	181	26.90 ⊗	51.40 ⊗	91.83 ⊗	119.64 ⊗		
Nigeria	Millet	Lagos, Wholesale, Naira/kg**	208	13.39 ↑	34.96 ⊗	62.11 ⊗	64.68 ⊗		
Nigeria	Millet	Maiduguri, Wholesale, Naira/kg**	175	19.66 ⊗	30.84 ⊗	98.86 ⊗	98.86 ⊗		

Note: Last price is for August 2020, *July, **June, ***April and ****March

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%), ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

The prices of sorghum in selected markets in Niger, Nigeria and Togo show moderate (5-15%) and high (>15%) increases in August/ September prices compared to the previous one, three and six months and one year (Table 10). Prices remained stable in Mali, and projections for the next three and six months for Mali and Niger indicate a decreasing trend. The recent harvests that started in September for sorghum are contributing to pushing prices down. For the rest of the countries in the region, harvests are expected in October and November, and good harvests will improve supplies and push prices down.

¹⁴ Author's construction based on data from WFP (2020) and FAO (2020)

Table 10: Changes in sorghum prices in selected West African countries¹⁵

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Mali	Sorghum	Ansongo, Retail, XOF/KG*	235	0.00 ●	0.00 ●	17.50 ☒	-8.00 ↓	-7.32 ↓	-7.74 ↓
Mali	Sorghum	Badalabougou, Retail, XOF/KG*	181	-6.70 ↓	-9.50 ↓	-9.50 ↓	-9.50 ↓	10.92 ↑	9.56 ↑
Mali	Sorghum	Faladié, Retail, XOF/KG*	206	3.00 ▲	3.00 ▲	3.00 ▲	3.00 ▲	-4.89 ↘	-6.39 ↓
Mali	Sorghum	Gao, Retail, XOF/KG*	250	0.00 ●	0.00 ●	0.00 ●	-3.85 ↘	-3.62 ↘	-5.52 ↓
Mali	Sorghum	Kayes Centre, Retail, XOF/KG*	250	-1.19 ↘	0.00 ●	1.21 ▲	0.00 ●	-5.95 ↓	-7.42 ↓
Mali	Sorghum	Niarela, Retail, XOF/KG*	200	14.29 ↑	14.29 ↑	23.46 ☒	10.50 ↑	-8.97 ↓	-8.05 ↓
Niger	Sorghum	Abalak, Retail, XOF/KG*	323	9.31 ↑	23.28 ☒	83.52 ☒	50.93 ☒	-18.60 ↓	-8.87 ↓
Niger	Sorghum	Bonkaney, Retail, XOF/KG*	280	15.31 ☒	15.31 ☒	17.24 ☒	19.23 ☒	-15.35 ↓	-15.69 ↓
Niger	Sorghum	Goure, Retail, XOF/KG*	307	1.66 ▲	26.86 ☒	117.73 ☒	40.18 ☒	-23.86 ↓	-17.78 ↓
Niger	Sorghum	Katako, Retail, XOF/KG*	282	12.80 ↑	17.50 ☒	84.31 ☒	31.78 ☒	-0.67 ↘	-16.03 ↓
Nigeria	Sorghum	Ibadan, Wholesale, Naira/kg**	204	15.77 ☒	50.93 ☒	88.58 ☒	97.82 ☒		
Nigeria	Sorghum	Kano, Wholesale, Naira/kg**	152	6.44 ↑	39.69 ☒	97.24 ☒	104.87 ☒		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/kg**	185	33.66 ☒	58.47 ☒	106.87 ☒	112.61 ☒		
Nigeria	Sorghum	Lagos, Wholesale, Naira/kg**	197	23.13 ☒	39.22 ☒	69.83 ☒	72.20 ☒		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/kg**	140	17.47 ☒	32.86 ☒	77.14 ☒	86.00 ☒		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/kg*	242	0.00 ●	5.22 ↑	34.44 ☒	30.81 ☒		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/kg*	144	17.07 ☒	6.67 ↑	8.27 ↑	16.13 ☒		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/kg*	280	-1.89 ↘	6.12 ↑	30.00 ☒	38.84 ☒		
Togo	Sorghum	Kor bongou, Retail, CFA Franc BCEAO/kg*	135	3.05 ▲	0.00 ●	-12.34 ↓	8.00 ↑		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/kg*	300	7.14 ↑	15.38 ☒	32.16 ☒	13.21 ↑		

Note: Last price is for August 2020, *July, **June, ***April and ****March

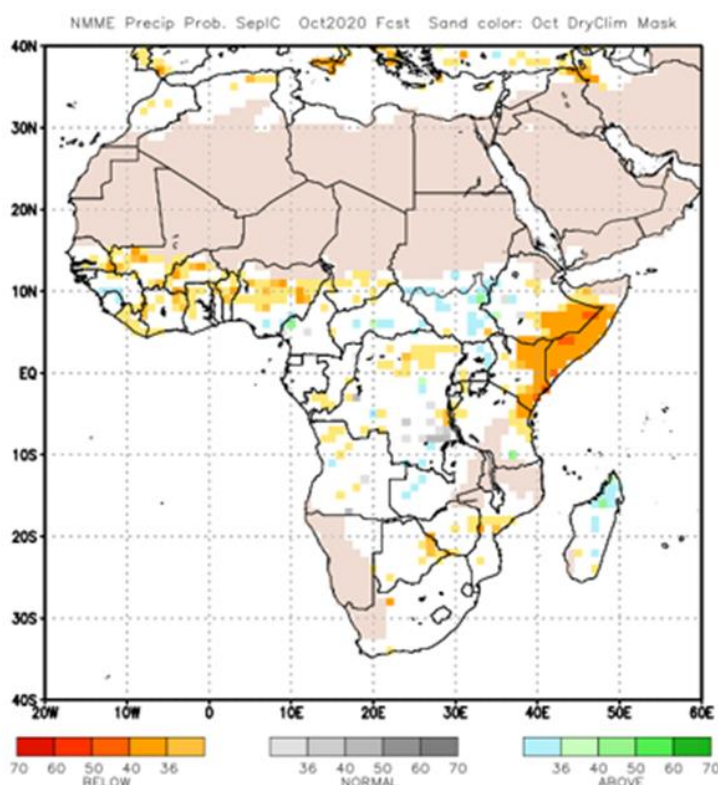
● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ☒ = high increase (>15%), ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

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

Climatic Conditions and Potential Implications for Food and Nutrition Security

The rainfall forecasts for October shows that most parts of East, Southern and West Africa would receive below-average rainfall (Figure 8). The projections are worrying for areas where the new cropping season starts from October/November especially in Southern Africa and in parts of East Africa that experience dual seasons. The implication could be a delayed start of the planting season that could end up affecting expected harvests adversely impacting on food and nutrition security. A few areas, such as parts of South Sudan and coastal parts of West Africa are projected to receive above-average rainfall in the same month.

Figure 8: North American Multi-Model Ensemble (NMME) rainfall forecast for October 2020, based on September 2020 initial conditions¹⁶



Desert Locust Outbreak and Impacts on Food Security and Trade

The September desert locust situation indicates a declining trend of the threat; however, some areas in the East Africa region still face the risk of swarm breeding such as Eritrea, Ethiopia and Sudan (Figure 10). There are still residual immature desert locust swarms in Samburu Country, northwest Kenya. The FAO desert locust situation update for September also show that there are no significant developments expected in West Africa. The locust impacted cropland areas continued to decline in all the affected East African countries (Figure 11). Efforts continue to control the spread and impact of the desert locust. These interventions are essential to reduce potential negative impacts on food production as well as food and nutrition security.

¹⁶ 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 NMME models – colour intensity shows the corresponding probability of the forecast. White colour indicates where there is disagreement amongst models as the most-likely tercile category. Original images are available at www.cpc.ncep.noaa.gov

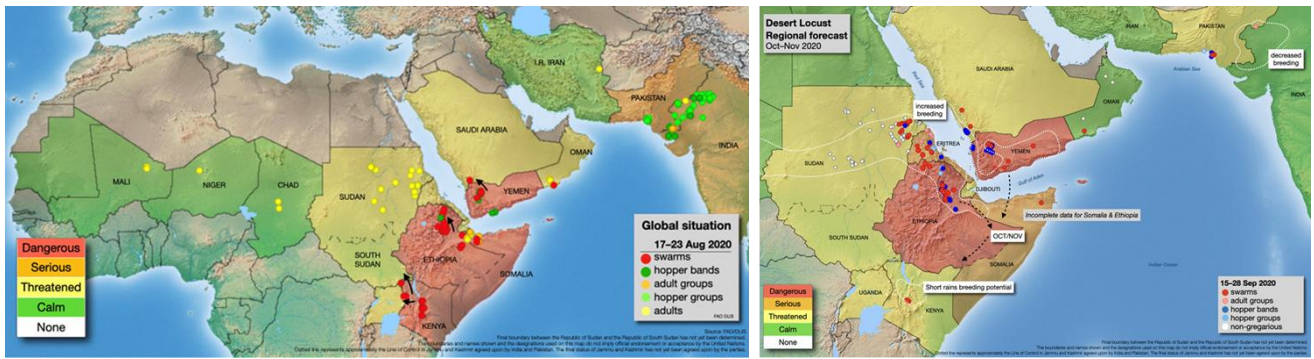


Figure 9: Situation, threat and forecast of desert locust in East Africa¹⁷

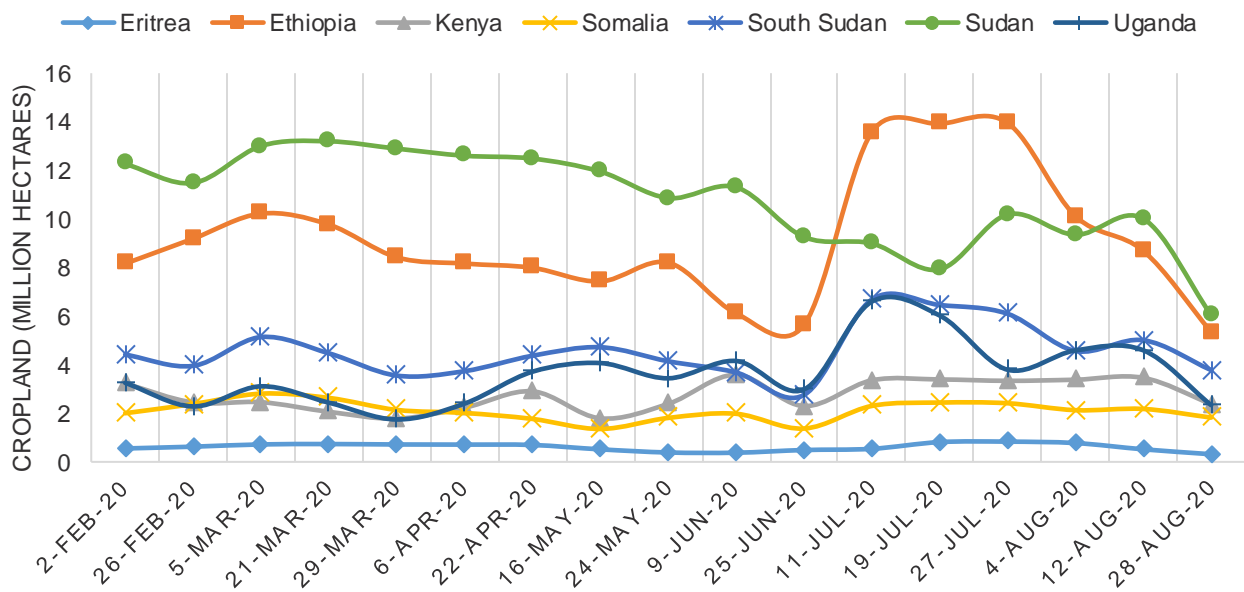


Figure 10: Locust Impacted Cropland Area (Pixel-level Analysis) in East Africa¹⁸

¹⁷ <http://www.fao.org/ag/locusts/common/ecg/75/en/200824global.jpg>. Accessed 25 August 2020 and <http://www.fao.org/ag/locusts/common/ecg/75/en/200928DLupdate.jpg>. Accessed 29 September 2020

¹⁸ <https://app.gro-intelligence.com/displays/WdK0QlqkK>. Accessed 28 September 2020



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