FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

EDITION #8

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Contents

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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.

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

The number of countries with very high levels of food insecurity decreased to four over the past month with the situation in Zimbabwe improving over the past month. The situation in West Africa appeared the most volatile. Three of the four hunger hotspots where more than 50 percent of the country have insufficient food for consumption are in West Africa. They include Burkina Faso, Mali, and Niger with South Sudan remaining a hunger hotspot. In East Africa, in Ethiopia, there was a marked deterioration in the food security situation as the number of people without sufficient food for consumption increased by 49%. In Southern Africa, Malawi continued to record an increase in the number of people with insufficient food for consumption for the third consecutive month with the number increasing by 96% in October.

Cross border transit remains slowed, but tracking systems are easing some transit woes, especially in East Africa. Implementation of the electronic tracking system RECDTS (Regional Electronic Cargo and Driver Tracking System) at the Kenya—Uganda borders have reduced queues from 100km to 50km. In Southern Africa, the continued COVID-19 test requirements continue to result in delays at border posts, particularly at the Beitbridge Border post between Zimbabwe and South Africa. In West Africa, the recent unrest in Nigeria, which has been reported to have disrupted food distribution in affected areas is likely to lead to seasonal food shortages and increases in food prices in those areas.

COVID-19 cases increased in countries tracked by the Food Security Monitor at a slightly higher rate than that noted in September as countries cautiously opened economies. October saw COVID-19 cases in African countries tracked by the Food Security Monitor, reaching a total of 1.1 M, as the monthly increase of cases rose by 19.4% compared to 19% in the previous month. Countries continued to take a cautious approach to re-opening their economies. This will help improve incomes and ability to access nutritious food, especially among those who were left in a precarious position by measures implemented by governments during the pandemic.

Desert locusts re-emerged as a threat to crops as we saw threats of a new generation of desert locusts emerge in the Horn of Africa, particularly in Ethiopia and Somalia. The new generation will result in new swarms forming by mid-December which are expected to move southwards. The interventions that the affected countries, together with partners, have put in place since the desert locust invasion started put them in a better place to continue monitoring and reducing new infections.

Agricultural commodities prices. In East Africa, maize prices recorded low (less than 5%) and moderate increases (5-15%) from September across many markets in the region. In Southern Africa, the good harvests experienced earlier this year contributed to boosting food supplies and pushing prices down this month. In West Africa, prices for millet have increased (mostly between moderate and high levels) compared to the past three, six and 12 months across all countries. However, the new millet harvests across the region are improving supplies and in the next three and six months are expected to push prices down.

Rainfall conditions vary across focus regions in Africa. The Southern Africa region where the main cropping season has started is projected to experience normal rainfall in many countries. This will be beneficial for planting activities that are ongoing. In East Africa, most of the region is projected to experience below normal rainfall while the western parts of the region, especially South Sudan, northern Uganda will experience above normal rainfall. The coastal areas of the West Africa region are projected to experience above-normal rainfall. The rainfall conditions, both dry and heavy rainfall, pose risks to the short season cropping activities.

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 food insecurity decreased to four over the past month with the situation in Zimbabwe improving over the past month. The remaining four hunger hotspots where more than 50 percent of the country has insufficient food for consumption are Burkina Faso, Mali, Niger, and South Sudan (Figure 1).

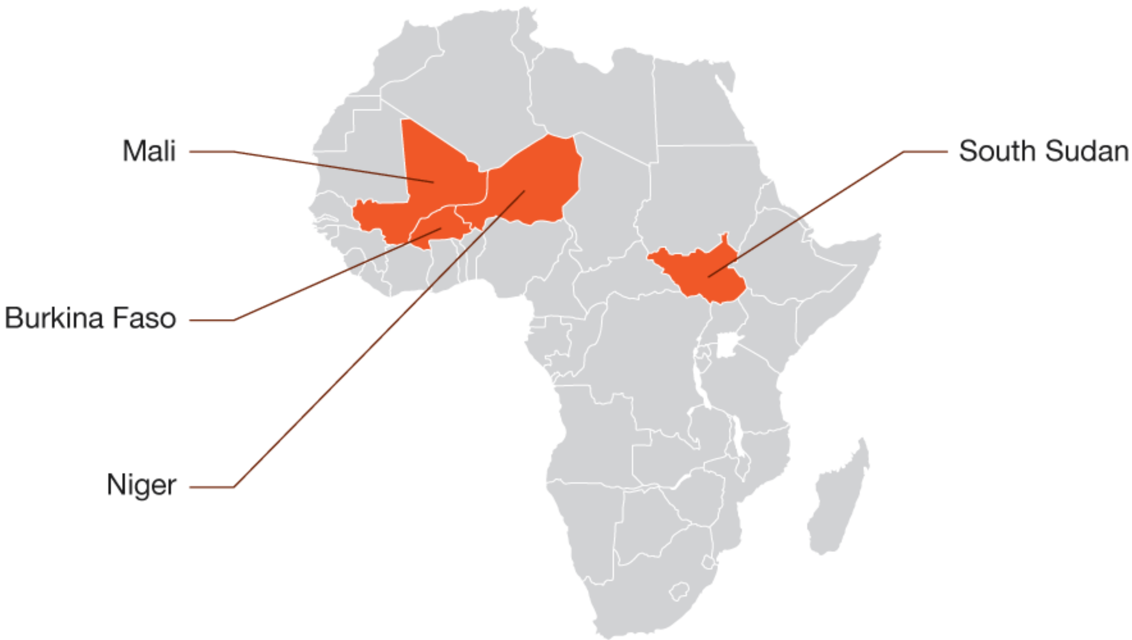


Figure 1: Early warning analysis of acute food insecurity hotspots, October 2020

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

East Africa

The prevalence of food insecurity remained unchanged in Kenya (moderately low), Uganda (high), South Sudan (very high) and Tanzania (low). The situation in Ethiopia deteriorated from a moderately high to a high food insecurity prevalence (Figure 2).

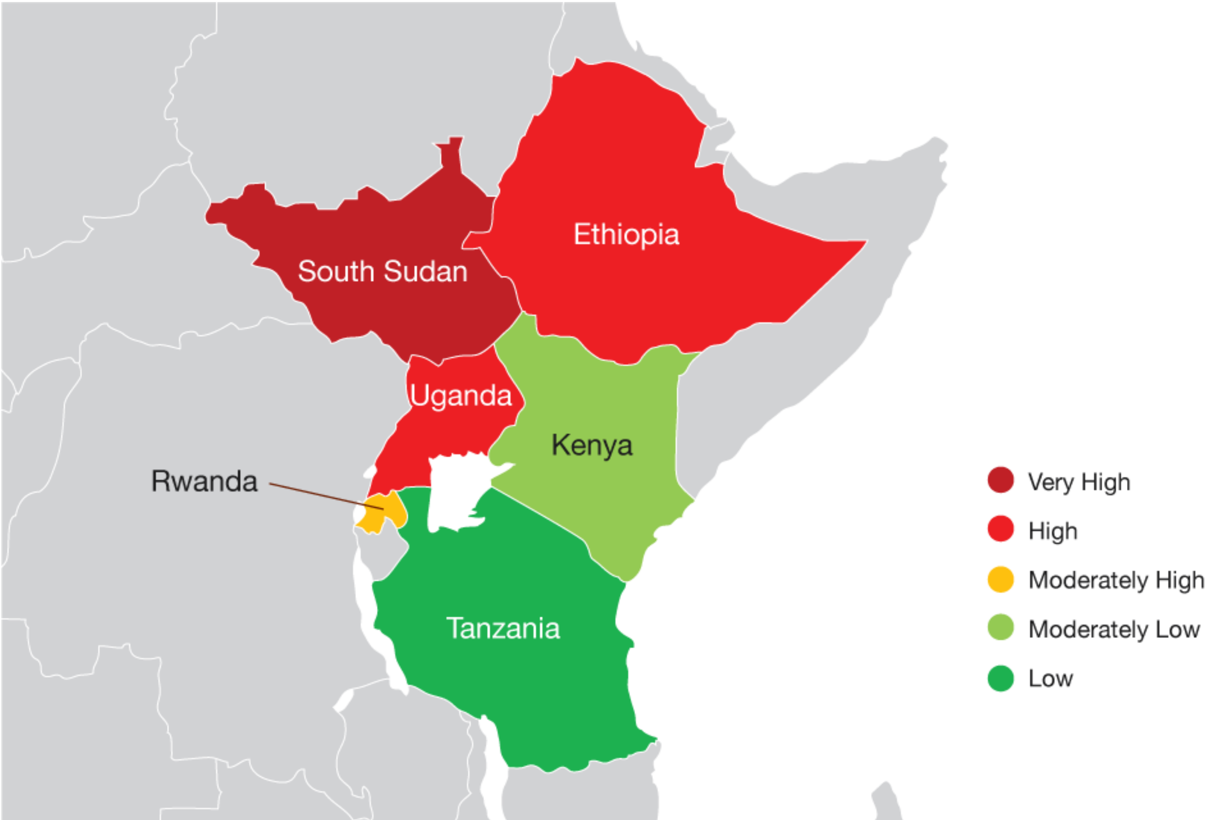


Figure 2: Prevalence of insufficient food consumption in selected East African countries, October 2020[1]

The number of people with insufficient food across selected focus countries in East Africa stood at 69.9 million for October. This figure is 20.7 percent higher than September, which indicates that the food security situation in the region has worsened over the past month. Across the different countries, Rwanda, South Sudan and Uganda recorded a decrease in the number of people with insufficient food consumption. In contrast, Ethiopia, Kenya and Tanzania recorded an increase in the number of people with insufficient food for consumption (Table 1). There was a marked deterioration in the food security situation in Ethiopia where the number of people without sufficient food for consumption increased by 49%.

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

Country	Population*	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	33.5m (30.6%)	48.90%	↑	7.20%	36.80%
Kenya	51.4m	9.0m (17.5%)	1.90%	↑	4.20%	26.20%
Rwanda	12.3m	3.2m (26.0%)	-3.30%	↓	2.00%	36.90%
South Sudan	11.0m	6.0m (54.5%)	-0.50%	↓	22.70%	31.30%
Tanzania	56.3m	5.2m (9.2%)	14.20%	↑	3.50%	31.80%
Uganda	42.7m	13.0m (30.4%)	-1.60%	↓	3.50%	28.90%

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

[1] https://hungermap.wfp.org/ Accessed 02 November 2020.
[2] https://hungermap.wfp.org/ Accessed 02 November 2020.

Southern Africa

The prevalence of food insecurity across selected focus Southern African countries remained unchanged in Mozambique (moderately high), Zambia (moderately high) and Zimbabwe (very high). In Malawi, the food security situation deteriorated as the food insecurity situation moved from a moderately low to a moderately high situation (Figure 2).

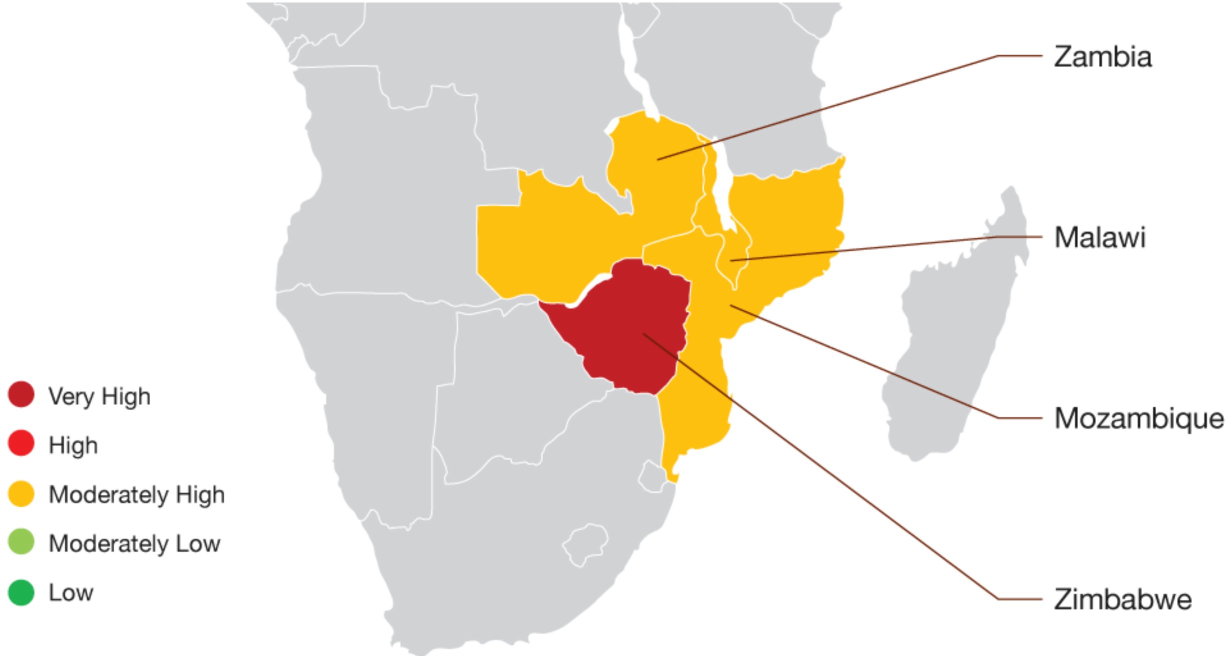


Figure 3: Prevalence of insufficient food consumption in selected Southern Africa countries, October 2020[3]

The number of people with insufficient food for consumption across all the selected countries stood at 20.2 million for October. This figure is 11.8 percent lower than September 2020. Across the different countries, Zambia and Zimbabwe recorded a decrease in the number of people with insufficient food for consumption while Malawi and Mozambique recorded an increase (Table 2). Malawi continued to record an increase in the number of people with insufficient food consumption for the third consecutive month with the number increasing by 96% over the past month.

Table 2: Number of people facing food consumption crisis in selected Southern African Countries (October 2020)[4]

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	3.8m (21.0%)	96.00% ↑	1.30%	39.00%
Mozambique	29.5m	7.6m (25.8%)	11.25% ↑	4.40%	42.30%
Zambia	17.4m	2.6m (28.7%)	-33.40% ↓	4.20%	34.60%
Zimbabwe	14.4m	6.2m (43.1%)	-21.50% ↓	2.90%	23.50%

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

[3] https://hungermap.wfp.org/ Accessed 02 November 2020.
[4] https://hungermap.wfp.org/ Accessed 02 November 2020.

West Africa

The prevalence of food insecurity in West Africa remained unchanged in Mali (very high), Niger (very high), Ghana (moderately low) and Burkina Faso (very high). In Togo, the food security situation deteriorated as the country moved from a moderately high to a high food insecurity prevalence situation. Cote d'Ivoire also experienced a deterioration in the country's food security situation as the country moved from a moderately low to a moderately high food insecurity prevalence situation. In Nigeria, the food security situation improved over the past month as the country moved from a moderately high to a moderately low food insecurity prevalence situation.

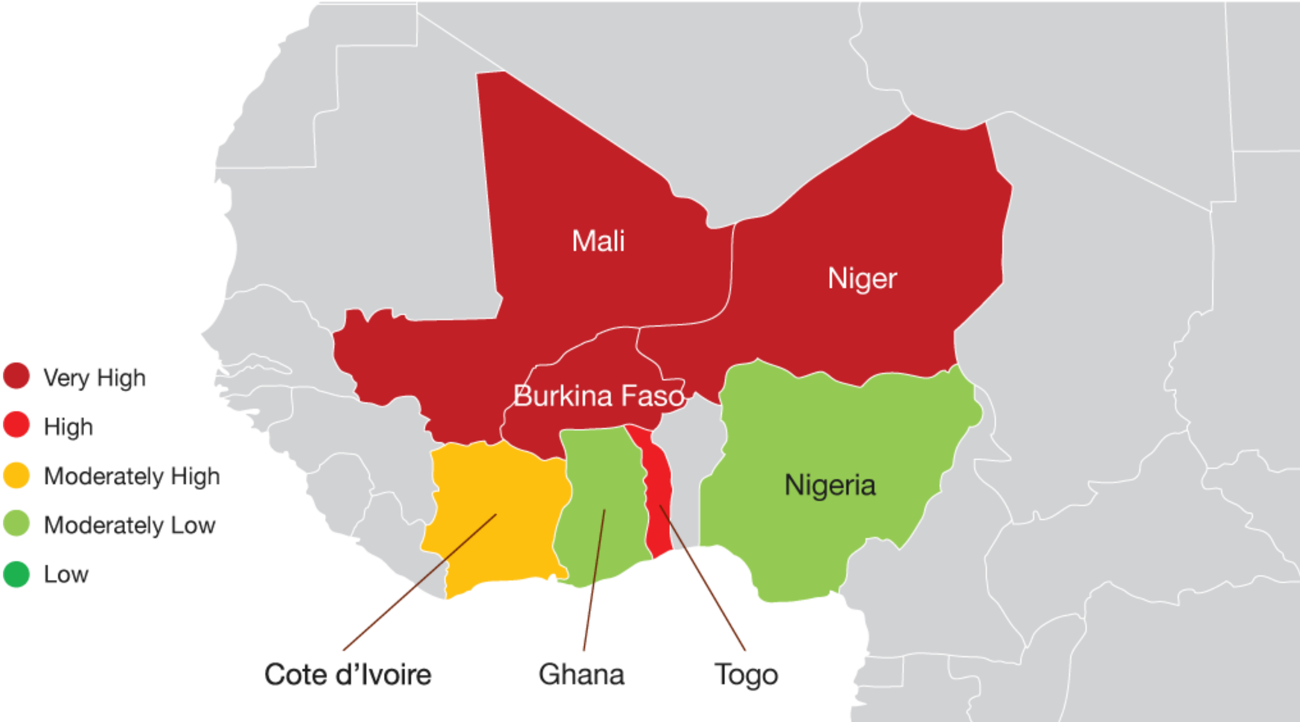


Figure 4: Prevalence of insufficient food consumption in selected West Africa countries, October 2020[5]

The number of people with insufficient food consumption across all the selected countries in West Africa stood at 77.1 million for October. This figure is 1.6 percent lower than for September. 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 Mali, Niger and Togo. In contrast, Burkina Faso, Cote d'Ivoire, Ghana, and Nigeria recorded decreases over the past month.

[5] https://hungermap.wfp.org/ Accessed 02 November 2020

Table 3: Number of people facing food consumption crisis in selected Southern African Countries (October 2020)[6]

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	10.6m (53.5%)	-4.50% ↓	8.40%	24.90%
Cote d'Ivoire	25.1m	5.2m (20.7%)	-3.30% ↓	6.10%	21.60%
Ghana	29.8m	5.2m (17.4%)	-2.80% ↓	6.80%	17.50%
Mali	19.1m	12.0m (62.8%)	6.20% ↑	9.00%	26.90%
Niger	22.4m	13.8m (61.6%)	6.70% ↑	14.10%	48.50%
Nigeria	202.8m	27.7 m (13.7%)	-35.20% ↓	6.80%	36.80%
Togo	7.9m	2.6m (32.9%)	23.90% ↑	5.70%	23.80%

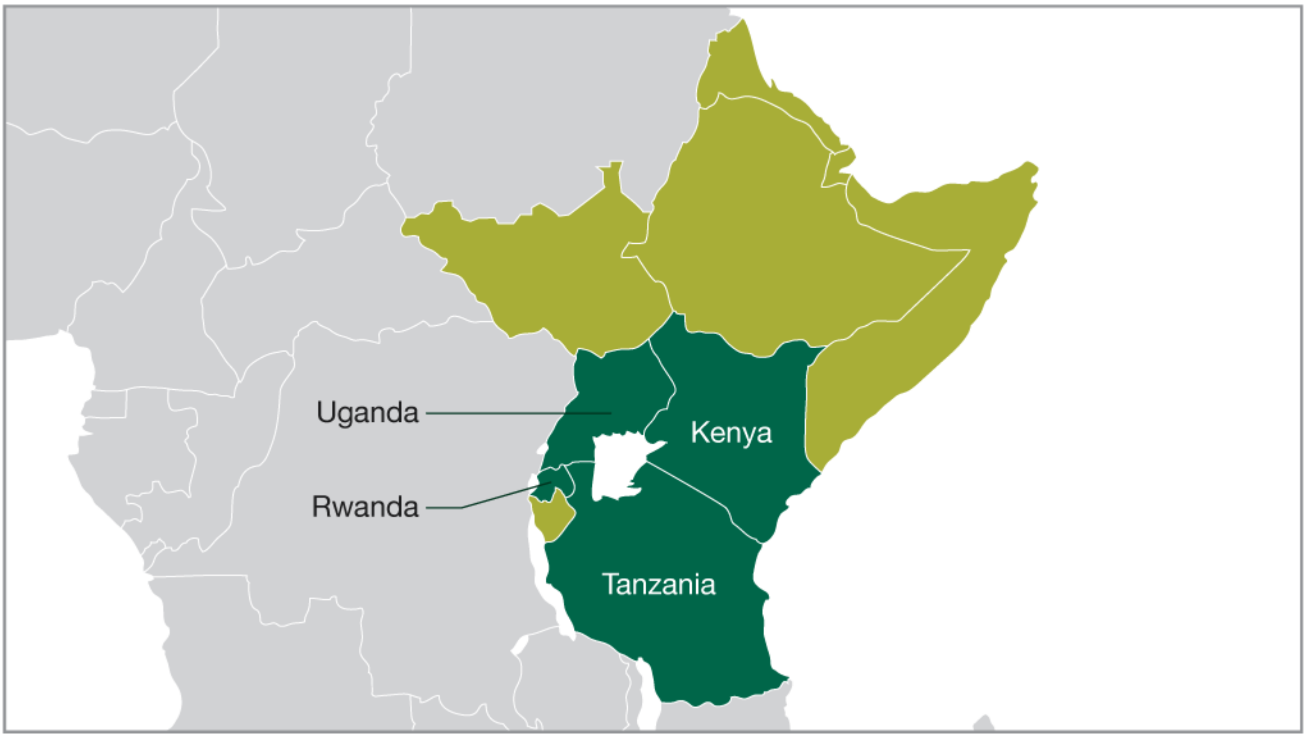
** Total population counts all residents, regardless of legal status or citizenship (the values shown are mid-year estimates)*
Data source: World Bank

Food Trade Updates

East Africa

Figure 5 provides an update of the various events and activities recorded and that remain in place at selected border posts in East Africa over the past month that has an impact on food trade in the region.

Figure 5: East Africa Cross border trade updates October 2020[7]



[6] https://hungermap.wfp.org/ Accessed 02 November 2020
[7] Author's compilation based on information from various secondary literature sources

TANZANIA/UGANDA

- The border remains open with COVID-19 tests still in place for truck drivers.
- Mandatory two weeks quarantine for Tanzanian truck drivers entering Uganda also remains in place.

UGANDA/KENYA

- Implementation of the RECDTS noted to have improved the delays at the borders as queues reduce from 100km to 50km.
- Kenya's Minister of Interior and National Coordination sent a delegation to Uganda to resolve identified issues. Kenya asked Uganda to fast-track the testing process and reduce the waiting time from over a week to two days. The talks were considered broadly successful.

TANZANIA/RWANDA

- Tanzania and Rwanda agreed to meet to discuss and address the various bottlenecks that are impeding smooth trade flow between the two countries.
- Challenges related to facilitating transit of perishable goods between the two countries remain in place.
- Rwanda continues to avoid using the Dar es Salaam port due to un-harmonized trade policies, congestion (at the port), numerous checkpoints along the route, and theft, among others.

KENYA/RWANDA

- Closure of the Uganda-Rwanda Border has forced Rwandan traders to utilise either the Central Corridor through Tanzania or to import by air.
- This is reported to have resulted in a 40% increase in transport costs.

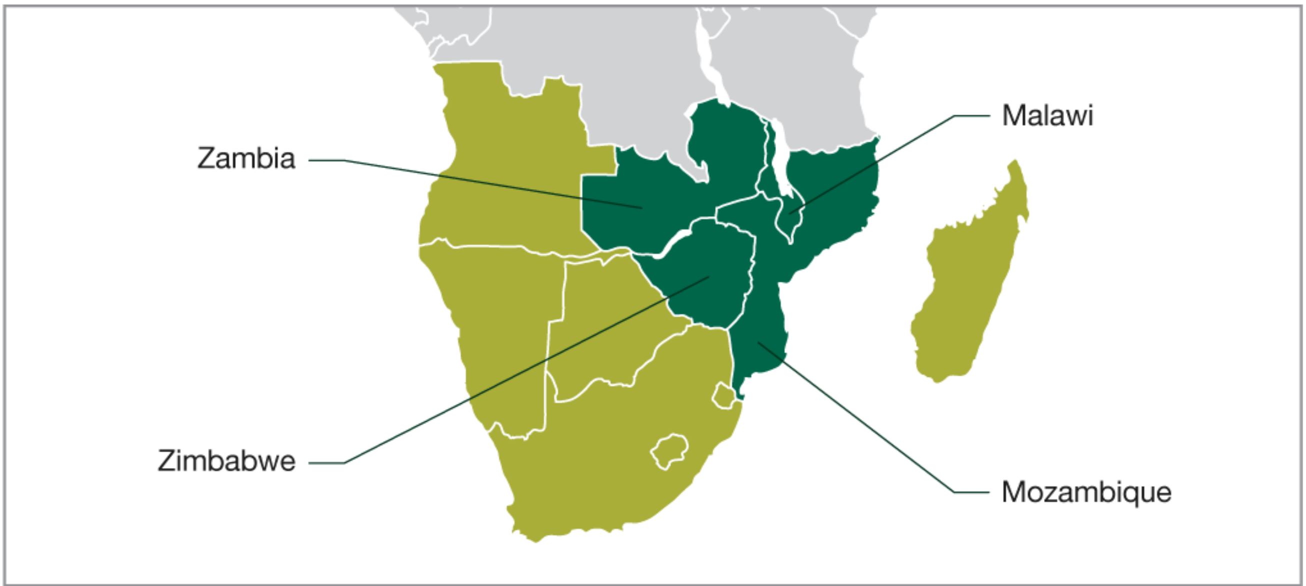
KENYA/TANZANIA

- Negative COVID-19 test certificates and mandatory 14-day quarantine for truck drivers crossing into Kenya remains in place.
- Arusha-based East African Business Council (EABC) met with Kenya's trade minister to discuss the ongoing requirements for re-testing of Tanzanian truck drivers for COVID-19 upon entry to Kenya. The EABC noted that the tests take up to a week to generate results, causing significant border congestion, with Tanzanian truck drivers spending an average of 14 days at the border.

Southern Africa

Figure 6 summarises the various activities and events recorded across Southern Africa that have an impact on food trade activities in the region. The continued COVID-19 test requirements continue to result in delays at border posts, particularly at the Beitbridge Border post between Zimbabwe and South Africa. Maize export restrictions in Malawi and Zambia continue to reduce trade activities in the region.

Figure 6: Southern Africa Food Trade Updates October 2020



ZAMBIA

- Maize export bans remain in place.
- The directive by the President that the Ministry of Commerce, Trade and Industry to ensure that international supermarket chains procured agricultural produce from local farmers rather than through imports also remains in place.

ZIMBABWE

- The government has announced that the Beitbridge Border Post will be opened up to the general public from the 1st of December 2020.
- Currently, COVID-19 test certificates remain in place with the costs pegged at USD60 for a PCR test and USD 15 for a blood test.

MALAWI

- Maize restrictions remain in place unless if exporters present proof that maize was produced commercially without support from the government subsidy program.

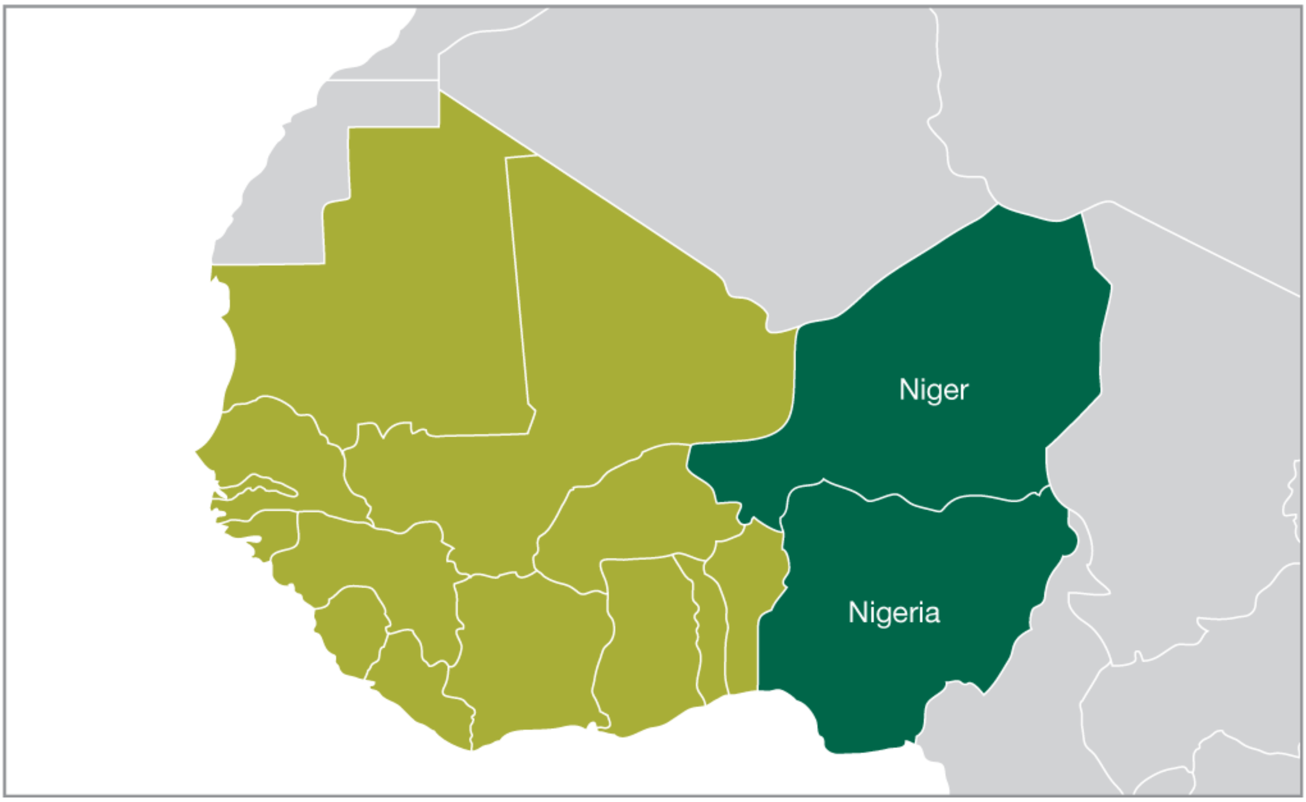
MOZAMBIQUE

- Traders reporting that COVID-19 regulations are making it too costly to resume operations as they are unable to afford the cost for receiving a COVID-19 test in Maputo, which ranges between $52-$82 – or roughly a monthly wage for many.
- Traders also reporting that they lack information on where COVID-19 test are taken.
- High testing costs have quickly led to corrupt practices and the issuing of fake test certificates.

West Africa

Figure 7 provides an update of issues and events reported in selected West African countries that have an impact on food trade and food security in the region. The recent unrests in Nigeria which have been reported to have disrupted food distribution in affected areas are likely to lead to seasonal food shortages and increases in food prices in those areas. COVID-19 measures continue to affect the smooth operation of trade activities, especially in Niger, where logistics services remain severely impacted.

Figure 7: West Africa Cross border Trade Updates October 2020



NIGER

- The main harvest period has begun, but farmers are struggling to access export markets as trucking costs have risen. While larger-scale farmers typically own at least one truck, smallholder farmers sell to “aggregators” who then rent a truck to transport the combined produce.
- COVID-19 has reduced truck availability significantly. Niger has very few dedicated transporters for agricultural produce. The sector was badly affected by movement restrictions, curfews, and market closures up to July, with many drivers losing their jobs.

NIGERIA

- Food transportation interrupted by security concerns, exacerbating food price spike.
- There has been a significant increase in civil unrest across multiple locations in Nigeria following the #EndSARS protests.
- The unrest has included looting of warehouses and is exposing and exacerbating the growing food security crisis in the country, driving up food prices.
- Warehouses containing emergency food supplies linked to COVID-19 relief have been targeted by looters. There are reports of looting from a number of state government-owned warehouses in Lagos, Adamawa, Bauchi, FCT, Oyo, Ondo, Osun, Plateau, Edo, Kogi, Kaduna, Kwara and Taraba states.

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

Figure 7 presents the status of COVID-19 cases and government measures across selected African countries as of 28 October 2020. The numbers of cases (1.1 M) indicate that there was a slight increase in the number of cases – increasing by 19.4% compared to 19% in the previous month. The percentage of recoveries slightly decreased from 83% to 82% (953,000 people) in October. About 2.4% of those stricken ill with COVID-19 across the continent have succumbed to the disease – resulting in the deaths of 25,532 people. Countries continued to take a cautious approach to re-opening their economies, and most activities have been permitted, although with necessary precautions. The re-opening of national economies is expected to help rebuild lost livelihoods and businesses. This will help improve incomes and ability to access nutritious food, especially among those who were left in a precarious position by measures implemented by governments during the pandemic.

1,113,767	134,463	953,772	25,532
Confirmed cases	Active cases	Recovered	Deaths

COVID-19 cases					COVID-19 Government Measures				
Country/Region	# Confirmed cases	Active cases	Recovered	# Deaths	Lockdown	Governance and socio-economic measures	Movement restrictions	Public health measures	Social distancing
South Africa	719,714	51,949	648,654	19,111	●	●	●	●	●
Ethiopia	94,820	43,483	49,886	1,451		●	●	●	●
Nigeria	62,371	3,137	58,095	1,139	●	●	●	●	●
Kenya	51,851	15,659	35,258	934	●	●	●	●	●
Ghana	47,775	488	46,971	316	●	●	●	●	●
Cote d'Ivoire	20,555	190	20,241	124	●	●	●	●	●
Zambia	16,285	378	15,559	348		●	●	●	●
Senegal	15,582	695	14,565	322		●	●	●	●
Mozambique	12,415	2,539	9,785	91		●	●	●	●
Uganda	11,767	4,200	7,461	106	●	●	●	●	●
Angola	10,074	6,106	3,693	275	●	●	●	●	●
Zimbabwe	8,320	233	7,845	242	●	●	●	●	●
Malawi	5,904	420	5,300	184	●	●	●	●	●
Rwanda	5,129	243	4,851	35	●		●	●	●
Somalia	3,941	652	3,185	104			●	●	●
Mali	3,530	727	2,667	136		●	●	●	●
South Sudan	2,890	1,544	1,290	56			●	●	●
Benin	2,643	272	2,330	41	●	●	●	●	●
Burkina Faso	2,466	218	2,181	67		●	●	●	●
Togo	2,238	564	1,620	54	●	●	●	●	●
Niger	1,218	17	1,132	69		●	●	●	●
Burundi	559	47	511	1			●	●	
Tanzania	509	305	183	21		●	●	●	●

Figure 8: 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

Compared to the previous month, maize prices recorded low (less than 5%) and moderate increases (5-15%) across many markets in the region. Uganda reported high increases (more than 15%) in maize prices. Some markets in Kenya and Tanzania reported a low decrease (less than 5%) and a moderate decrease in maize prices (5-15%). Despite good harvests reported in the previous month, maize prices increased substantially in Uganda. The increase in supplies reported in the last month (from imports in Kenya and harvest in Tanzania) contributed to the sustained decline in maize prices. Projections for the next three and six months show a general decline in Rwanda while there are mixed projections in Tanzania.

Table 4: Changes in maize prices in selected East African Countries[8]

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*	12	0.24	10.72	24.39	5.77		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG*	13	7.63	27.62	26.77	29.22		
Ethiopia	Maize (white)	Mekele, Ethiopian Birr/KG***	12	5.54	-2.04	9.09	25.00		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	29	-7.68	-17.31	-8.21	-15.10		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	33	0.70	3.69	5.58	-9.08		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	29	-11.29	-22.79	-8.71	-14.65		
Rwanda	Maize (white)	Kabuga, Retail, RWF/MT*	300	-1.10	20.00	33.33	-33.33	-36.60	-38.73
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*	397	13.12	32.22	15.82	-10.36	-21.49	-24.04
Rwanda	Maize (white)	Mugera, Retail, RWF/MT*	300	12.50	13.93	34.33	-14.29	-9.86	-8.20
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	266	-0.93	3.23	9.62	-11.39	-13.68	-16.03
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	263	-9.63	39.39	57.54	162.86		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	222	7.19	1.18	51.57	71.69		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	319	8.76	54.07	71.85	152.14		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	172	2.04	11.52	44.58	29.59		
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	700	22.12	-32.23	-33.46	-23.20		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	741	16.12	-17.79	-22.74	-18.06		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	651	20.18	-29.07	-26.03	-7.05		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	628	21.79	-33.95	-29.94	-17.01		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

= 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 bean have increased ranging low to high compared to the previous 1, 3 and 6 months in Rwanda, Tanzania and Uganda (Table 5). Projections for the next 3 and 6 months indicate an

[8] Author’s construction based on data from WFP (2020) and FAO (2020)

overall decline in the selected markets in Rwanda. On the contrary, prices will continue to rise in Tanzania.

Table 5: Changes in bean prices in selected East African Countries[9]

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*	633	-4.04	12.59	36.94	31.26	-16.92	0.72
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG*	770	3.59	24.19	21.74	39.28	-18.89	-20.15
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG*	892	14.44	46.44	78.33	69.84	-31.07	-37.37
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	762	25.27	27.01	13.96	57.45	-24.85	-27.03
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG*	178,864	15.40	3.19	14.40	15.40	2.05	2.07
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	2,902	0.17	23.44	-11.10	-0.15		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG	2,719	4.38	24.24	-2.80	13.01		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

= 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 generally increased in selected markets in Ethiopia, Rwanda and South Sudan in the past month. The prices remained constant in Mugera and Nyabiheke Camp (both in Rwanda) while they dropped in Weil (South Sudan). Current prices are relatively higher compared to the same period last year except in Mugera and Nyabiheke Camp.

Table 6: Changes in sorghum prices in selected East African Countries[10]

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*	15	9.32	14.13	41.17	16.38		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG*	25	0.61	0.16	45.33	30.26		
Rwanda	Sorghum	Kabuga, Retail, RWF/MT	440	6.67	3.53	-3.65	0.57	-12.24	-11.38
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/MT	500	5.26	11.11	-6.25	17.65	-11.44	-12.41
Rwanda	Sorghum	Mugera, Retail, RWF/MT	280	0.00	-18.84	-28.21	-26.32	14.66	13.74
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG**	300	0.00	-25.00	-23.08	-6.25	19.71	18.63
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	314	-17.32	58.22	161.43	261.20		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	222	8.08	0.39	48.66	62.69		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	292	21.00	56.92	70.00	126.67		
South Sudan	Sorghum	Torit, Retail, South Sudanese Pound/KG	172	11.52	33.33	56.66	65.29		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	448	-6.67	110.05	186.99	180.82		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

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

Southern Africa

Maize prices showed a small increase in Malawi compared to last month and 3 months ago (Table 7). However, the prices were lower than the previous 6 months and 1 year. The good harvests experienced earlier this year contributed to boosting food supplies and pushing prices down. In Zambia, maize prices remained constant in a number of selected markets while they moderately (5-15%) increased in others. In the following 3 and 6 months, prices in Mozambique and Zambia are expected to increase between moderate (5-15%) and high levels (more than 15%). The harvests from the previous season start to dwindle, pushing prices to increase.

Table 7: Changes in maize prices in selected Southern African Countries[11]

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	0.00	-18.48	-59.46	-34.07		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	144	2.45	0.17	-49.34	-19.86		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	150	0.27	4.90	-56.04	-17.24		
Malawi	Maize (white)	National Average, Retail, MWK/KG	181	3.43	3.87	-39.92	-19.56		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	197	-1.20	-1.50	-30.45	-19.01		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	16	2.84	12.34	-39.44	-6.71	-15.61	-19.20
Mozambique	Maize (white)	Chimoio, Retail, MZN/KG**	17	9.73	49.96	-20.35	42.83	29.40	35.82
Mozambique	Maize (white)	Gorongoza, Retail, MZN/KG***	15	16.80	-31.71	-34.46	15.07	32.63	71.57
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	26	-2.81	0.38	-7.98	-6.74	12.70	15.14
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	23	4.19	16.85	-40.15	11.02	15.32	30.55
Mozambique	Maize (white)	Pemba, Retail, MZN/KG	27	11.73	58.34	-13.65	11.73	-22.33	-21.89
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG	3	0.00	22.52	-55.34	-25.48	-46.32	-16.18
Zambia	Maize (white)	Chipata, Retail, ZMW/KG	3	6.87	9.12	-37.80	8.36	8.04	14.47
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG	3	0.00	-5.76	-50.00	-34.59	19.78	42.45
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG	4	8.11	8.11	-30.77	-4.51	10.83	10.83
Zambia	Maize (white)	Mpika, Retail, ZMW/KG	3	0.00	0.00	-39.86	-7.61	25.84	45.32

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

= 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

Compared to the previous month, maize prices in Nigeria continued to increase between moderate (5-15%) to high (>15%) levels. In the other selected countries, prices either remained constant or slightly declined compared to the previous month. Projections for the next three and six months indicate low and moderate (5-15%) decreases and low increases (0-5%) for Cote d'Ivoire and Ghana.

[11] Author's construction based on data from WFP (2020)

Table 8: Changes in maize prices in selected West African countries[12]

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*	225	-3.23	-6.29	-10.00	80.00	-13.33	-15.81
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	200	-2.44	-20.00	14.29	-21.95	13.72	8.21
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	160	-5.26	-8.86	-2.04	6.00	-8.93	2.20
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	149	16.67	46.71	25.34	48.72	-8.04	-10.99
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	157	-18.77	-19.29	-19.82	-17.06	-19.50	-15.77
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	95	-17.66	-12.44	-5.00	54.37	-9.26	1.98
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)	Niarela, Retail, XOF/KG**	175	0.00	0.00	16.67	-3.31	0.45	0.43
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	199	5.63	53.08	96.54	109.47		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	188	21.85	66.54	103.82	136.24		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	187	7.30	66.40	99.15	144.79		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG**	198	7.49	41.03	85.92	92.70		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	181	8.53	53.60	110.14	113.24		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	158	-1.86	12.86	21.54	21.54		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	140	0.00	7.69	7.69	40.00		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	150	-1.96	11.11	11.11	36.36		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	188	-2.08	13.94	30.56	22.88		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	150	0.00	11.11	11.11	25.00		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	198	0.51	10.61	17.86	8.20		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

= 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 for millet indicate that they have increased (mostly between moderate and high levels) compared to the past three, six and 12 months across all countries. In the past month, millet prices either increased slightly or moderately with a few markets reporting moderate declines or prices remained the same. The new millet harvests across the region are improving supplies and pushing

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

Table 9: Changes in millet prices in selected West African countries[13]

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	217	8.50	-1.36	25.43	3.83	-3.03	-3.00
Burkina Faso	Millet	Bousse, Retail, XOF/KG	179	0.00	-10.95	0.00	11.18	2.58	-1.32
Burkina Faso	Millet	Dori, Retail, XOF/KG	269	-7.88	6.32	23.39	21.17	-17.14	-13.45
Burkina Faso	Millet	Faramana, Retail, XOF/KG	178	7.23	22.76	34.85	63.30	-11.41	-13.74
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	230	11.65	21.69	36.09	41.98	-3.00	-8.49
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	265	1.53	19.91	24.41	27.40	-3.44	-4.78
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	199	8.15	30.07	56.69	60.48	-0.36	6.95
Burkina Faso	Millet	Titao, Retail, XOF/KG	170	8.97	33.86	18.88	18.06	-18.15	-0.67
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	-6.73
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	337	-7.32	15.41	24.35	54.59	-7.99	-2.65
Niger	Millet	Bonkaney, Retail, XOF/KG	306	-3.16	27.50	30.77	28.57	-11.04	-9.58
Niger	Millet	Goure, Retail, XOF/KG	329	-6.53	16.67	15.03	34.29	-15.40	-4.28
Niger	Millet	Katako, Retail, XOF/KG	307	0.00	19.46	27.92	46.19	-10.41	-3.16
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	210	0.00	44.83	87.50	86.83		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	180	-0.01	29.67	85.68	111.43		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	199	13.98	62.52	90.39	153.66		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	236	14.56	35.79	78.45	91.87		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	178	1.43	19.93	91.89	102.86		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

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

Mali, Niger and Togo recorded between constant, low increases and slight declines in sorghum prices in the past month. On the contrary, Nigeria reported mainly high increases in all the reporting periods (1, 3, 6 and 12 months) (Table 10). The prices are expected to continue the declining trend in the next 3 and 6 months in Mali and Niger. As in the previous month, the new harvests are contributing to pushing the prices down.

[13] Author's construction based on data from WFP (2020) and FAO (2020)

Table 10: Changes in sorghum prices in selected West African countries[14]

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	-6.00	-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	-6.97	-6.05
Niger	Sorghum	Abalak, Retail, XOF/KG	297	-8.05	6.07	26.92	38.79	-10.67	-14.60
Niger	Sorghum	Bonkaney, Retail, XOF/KG	280	-0.07	17.15	15.23	17.65	-14.64	-15.05
Niger	Sorghum	Goure, Retail, XOF/KG	297	-3.26	22.73	22.73	42.11	-14.22	-17.25
Niger	Sorghum	Katako, Retail, XOF/KG	282	0.00	17.50	17.50	36.89	-0.57	0.69
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	210	5.00	55.56	98.58	110.00		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	186	21.12	68.15	97.34	170.53		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	205	13.51	79.93	118.42	141.02		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	232	19.22	58.86	102.40	97.66		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	178	29.00	58.48	121.88	121.88		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	245	1.24	1.24	13.43	10.36		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	145	0.69	7.41	9.02	20.83		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	260	0.00	6.12	18.18	36.84		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	140	3.70	3.70	-9.09	16.67		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	320	6.67	14.29	33.33	15.11		

*Note: Last price is for September 2020, *October, **August, ***July and ****June*

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

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

Climatic Conditions and Potential Implications for Food and Nutrition Security

Figure 8 presents the rainfall forecasts for November as well as for the period October to December. The Southern Africa region where the main cropping season has started is projected to experience normal rainfall in many countries, especially around central parts of the region. This will be beneficial for planting activities that are ongoing for the main season. The western parts and eastern parts indicate below normal rainfall. In East Africa, most parts of the region (especially Kenya, Ethiopia and Tanzania) are projected to experience below normal rainfall while the western parts of the region especially South Sudan, northern Uganda will experience above normal rainfall. The coastal areas of the West Africa region are projected to experience above-normal rainfall. Rainfall conditions – both dry and heavy rainfall - pose risks to the short season cropping activities.

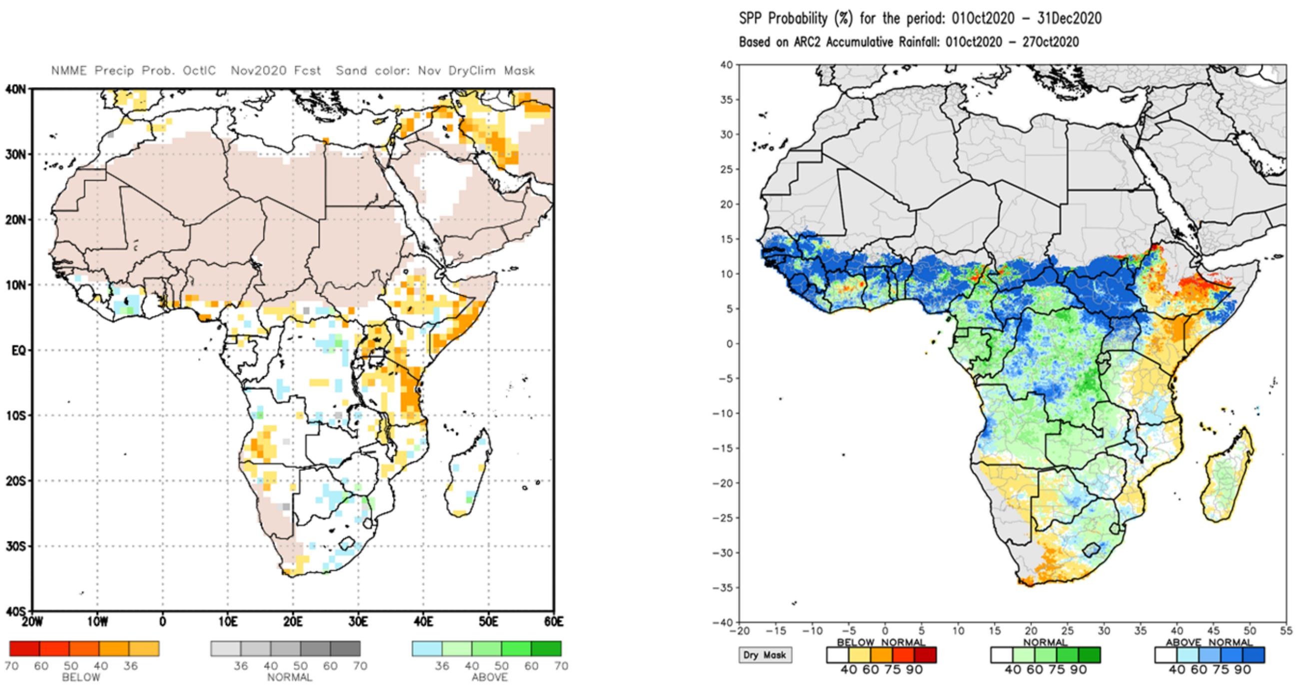


Figure 9: North American Multi-Model Ensemble (NMME) rainfall forecast for October 2020, based on September 2020 initial conditions[15]

[15] 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

Desert Locust Outbreak and Impacts on Food Security and Trade

The desert locust situation updates for October highlighted threats of breeding of another generation that started in the Horn of Africa, particularly in Ethiopia and Somalia. The new generation will result in new swarms forming by mid-December which are expected to move southwards, increasing the risk for Kenya (Figure 9). In contrast to the declining trend of the locust impacted cropland areas reported in the past months, there was a drastic increase in impacted areas from mid-September rising to almost mid-August levels. The interventions that the affected countries, together with partners, have put in place since the desert locust invasion started put them in a better place to continue monitoring and reducing new infections. These measures are essential to help control new risks that might negatively impact on the short season cropping season crops in the region.

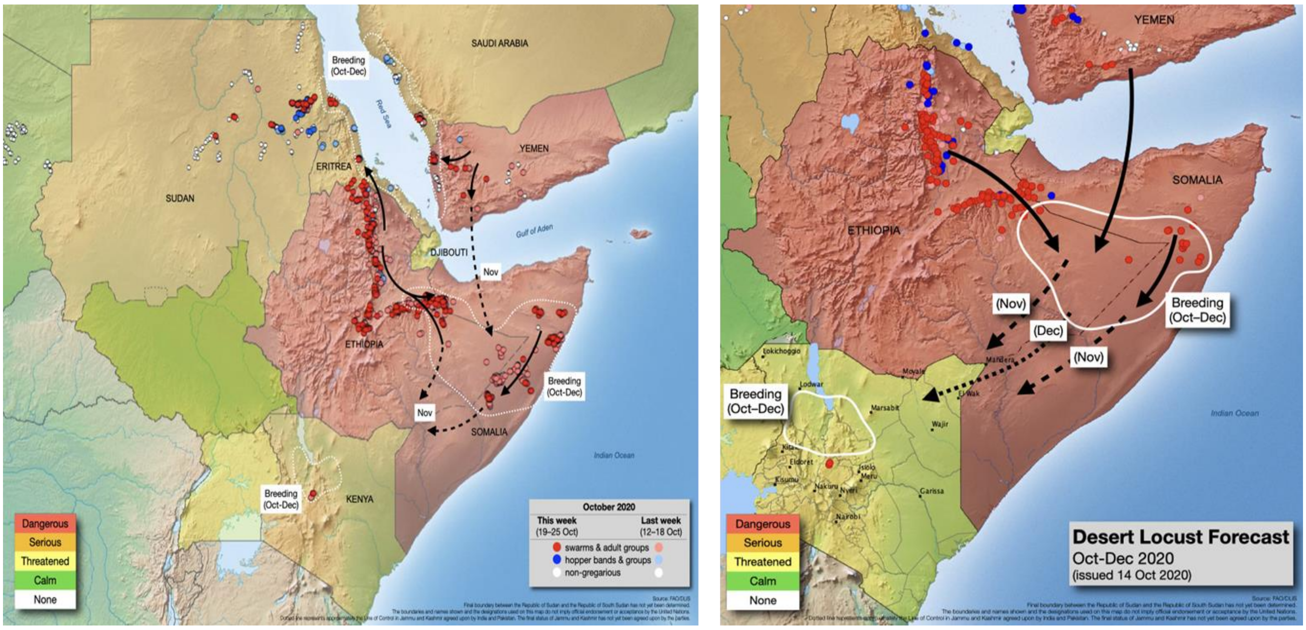


Figure 10: Situation, threat and forecast of desert locust in East Africa[16]

[16] http://www.fao.org/ag/locusts/common/ecg/75/en/201026DLupdate.jpg. Accessed 29 October 2020 and http://www.fao.org/ag/locusts/common/ecg/75/en/20201014HoA_forecast.jpg. Accessed 29 October 2020

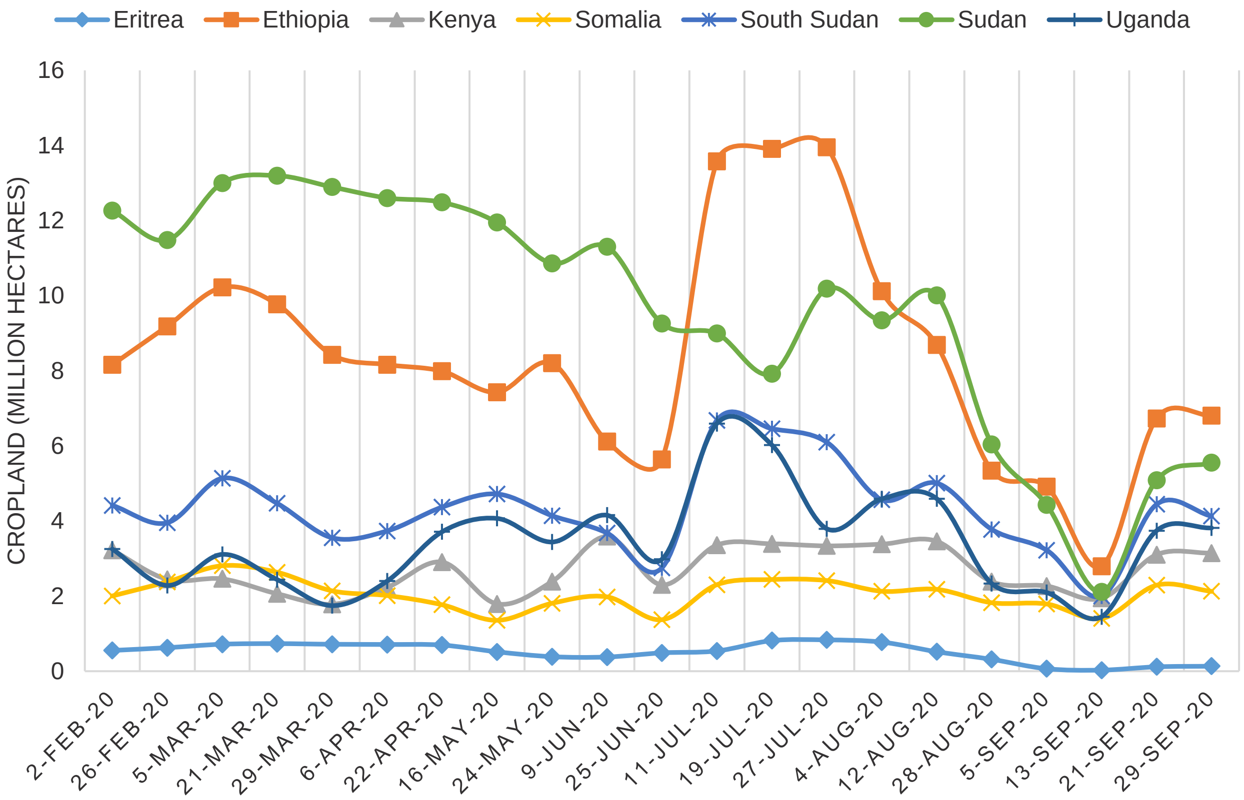


Figure 11: Locust Impacted Cropland Area (Pixel-level Analysis) in East Africa[17]

[17] https://app.gro-intelligence.com/displays/WdK0QlkqK. Accessed 29 October 2020

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