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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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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 November Food Security Monitor are summarized below.

Food Security Outlook. Burkina Faso, Mali, Niger and South Sudan continued to show very high levels of food insecurity with more than 50% of the population in these countries having insufficient food for consumption. This is the third consecutive month since AGRA began tracking hunger hotspots that these four countries have had more than 50% of their total population without adequate food for consumption.

Cross Border Trade. In East Africa, we saw cross border trade activities progressively improve since the third quarter of 2020. We expect the improvement to be sustained during the fourth quarter - supported by the export surplus from Ethiopia, Uganda and Tanzania alongside the easing of COVID-19 restrictions and streamlining of work processes at the borders. In Southern Africa, delays at the Beitbridge border post between Zimbabwe and South Africa have recently been worsened by the diversion of trucks from Botswana. This continues to create a challenge for efficient trade activities in the region. In West Africa, Nigeria, which had recently closed off its border with Benin to stem the smuggling of rice, announced that it would soon be opening its land borders. This move is expected to increase regional trade activities, including informal cross border trade activities with its key trade partners in the region.

Agricultural commodities prices. There is a mixed picture across Africa. In East Africa, maize prices in Kenya, Tanzania and Uganda showed a declining trend compared to the levels in the past 12 months. For the next 3 and 6 months, projections indicate a contrasting picture in Rwanda and Tanzania. In Rwanda, data indicates a likely overall decline in maize prices (except in Kigali), but Tanzania is showing an upward trend in maize prices. In West Africa, maize prices in Nigeria continue to soar compared to the previous 3, 6 and 12 months with increases ranging from 10% to 136% in the selected markets.

Rainfall conditions vary across focus regions in Africa. Above normal rainfall is projected for most of the Southern Africa region covering Malawi, Mozambique, Zimbabwe, eastern Zambia, central and eastern South Africa, and south-eastern Botswana. The above-normal rainfall, if it does not reach flooding levels, provides a conducive environment for the main growing season that just started in the region. However, the western parts of the region are projected to receive below normal rainfall. In East Africa, most of Tanzania, Rwanda and parts of Kenya are projected to receive above-normal rainfall. The above-normal rainfall in parts of the region with a dual season provides conducive planting conditions for farmers starting the short-rains season. The rest of the region is projected to receive below normal rainfall in December. Most parts of the West Africa region are projected to receive below normal rainfall, with average rainfall expected in the coastal areas.

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, Cote d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Outlook

The number of countries with very high levels of food insecurity where more than 50% of the country's total population has insufficient food for consumption remained stable at four over the past month. For a third consecutive month since AGRA began tracking hunger hotspots, Burkina Faso, Mali, Niger and South Sudan have consistently had more than 50% of their total population without adequate food for consumption.

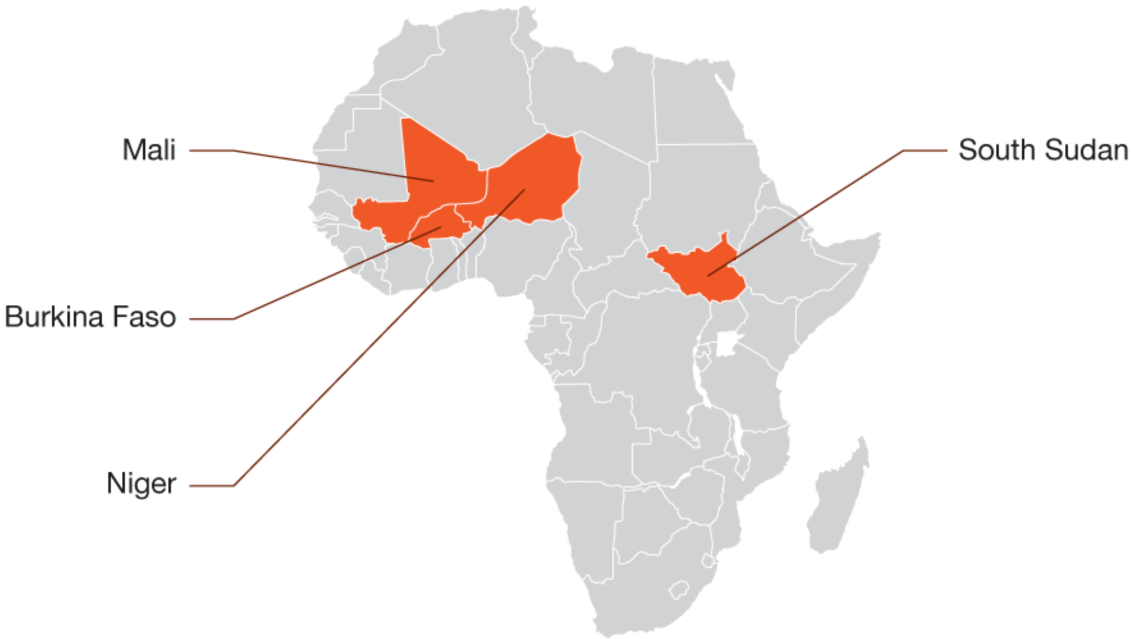

Figure 1: Early warning analysis of acute food insecurity hotspots, November 2020

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

East Africa

The prevalence of food insecurity remained unchanged in South Sudan (very high), Uganda (High) Rwanda (moderately high) and Tanzania (low). In Kenya, the food security situation deteriorated from a moderately low to moderately high situation while in Ethiopia, the food security situation improved significantly from high to moderately low situation (Figure 2).

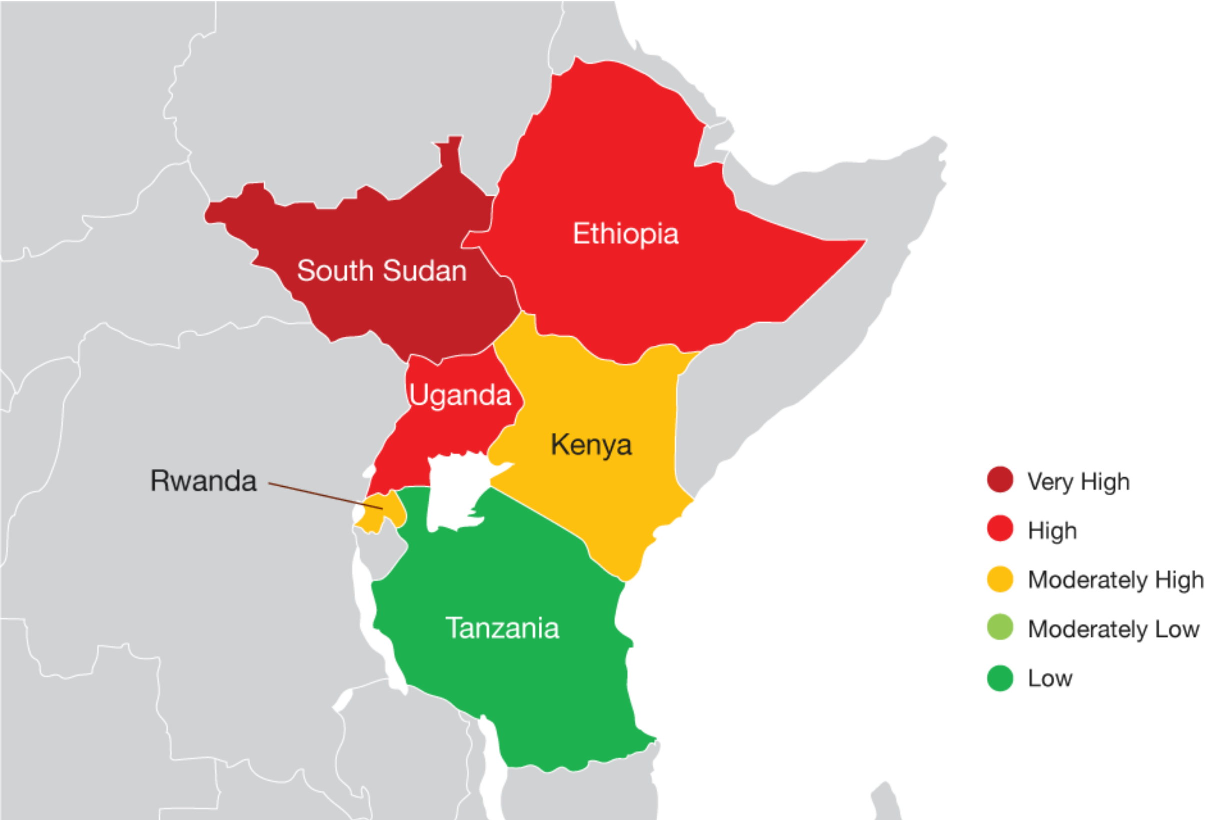

Figure 2: Prevalence of insufficient food consumption in selected East African countries, November 2020[1]

The number of people with insufficient food for consumption across selected focus countries in East Africa stood at 58.8 million for November. This figure is 15.9 percent lower than October. While this indicates that the food security situation in the region has improved over the past month, the situation varied across the different countries. Kenya (20 percent) and Tanzania (5.8 percent) recorded an increase in the number of people with insufficient food for consumption. In Rwanda, South Sudan and Uganda, the situation remained stable over the month, while in Ethiopia the number of people with insufficient food for consumption reduced considerably by 39 percent (

[1] https://hungermap.wfp.org/ Accessed 30 November 2020.

Table 1).

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)		Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Ethiopia	109.20	33.50	20.34	18.63%	-39.28%	↓	7.20%	36.80%
Kenya	51.40	9.00	10.80	21.01%	20.00%	↑	4.20%	26.20%
Rwanda	12.30	3.20	3.20	26.02%	0.00%	●	2.30%	38.30%
South Sudan	11.00	6.00	6.00	54.55%	0.00%	●	22.70%	31.30%
Tanzania	56.30	5.20	5.50	9.77%	5.77%	↑	3.50%	31.80%
Uganda	42.70	13.00	13.00	30.44%	0.00%	●	3.50%	28.90%

*● = no change; ↓ = decrease, ↑ = increase, *Previous month and ** Current month*

Southern Africa

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

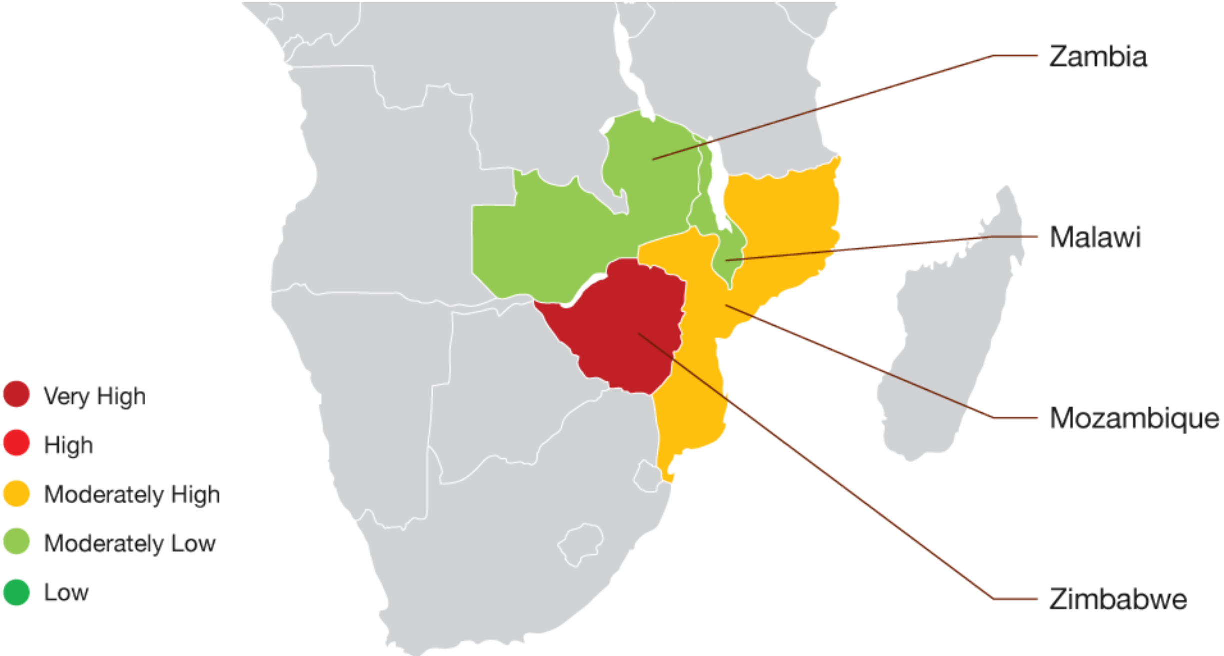

Figure 3: Prevalence of insufficient food consumption in selected Southern Africa countries, November 2020[3]

The number of people with insufficient food for consumption across selected focus countries in Southern Africa stood at 19.4 million for November. This figure is 4.0 percent lower than October 2020. All the selected countries in the region except Mozambique (7.9 percent) recorded a decrease in the number of people with sufficient food for consumption (Table 2).

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[2] https://hungermap.wfp.org/ Accessed 30 November 2020.
[3] https://hungermap.wfp.org/ Accessed 30 November 2020.

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Malawi	18.10	3.80	3.40	18.78%	-10.53% ↓	1.30%	39.00%
Mozambique	29.50	7.60	8.20	27.80%	7.89% ↑	4.40%	42.30%
Zambia	17.40	2.60	1.80	10.34%	-30.77% ↓	4.20%	34.60%
Zimbabwe	14.40	6.20	6.00	41.67%	-3.23% ↓	2.90%	23.50%

● = no change; ↓ = decrease, ↑ = increase, *Previous month and ** Current month

West Africa

The prevalence of food insecurity across selected countries in West Africa remained unchanged in Mali (very high), Niger (very high), Ghana (moderately low) and Burkina Faso (very high), Togo (high), Cote d'Ivoire (moderately high). In Nigeria, the food security situation deteriorated as the country moved from a moderately low to a moderately high food insecurity prevalence situation.

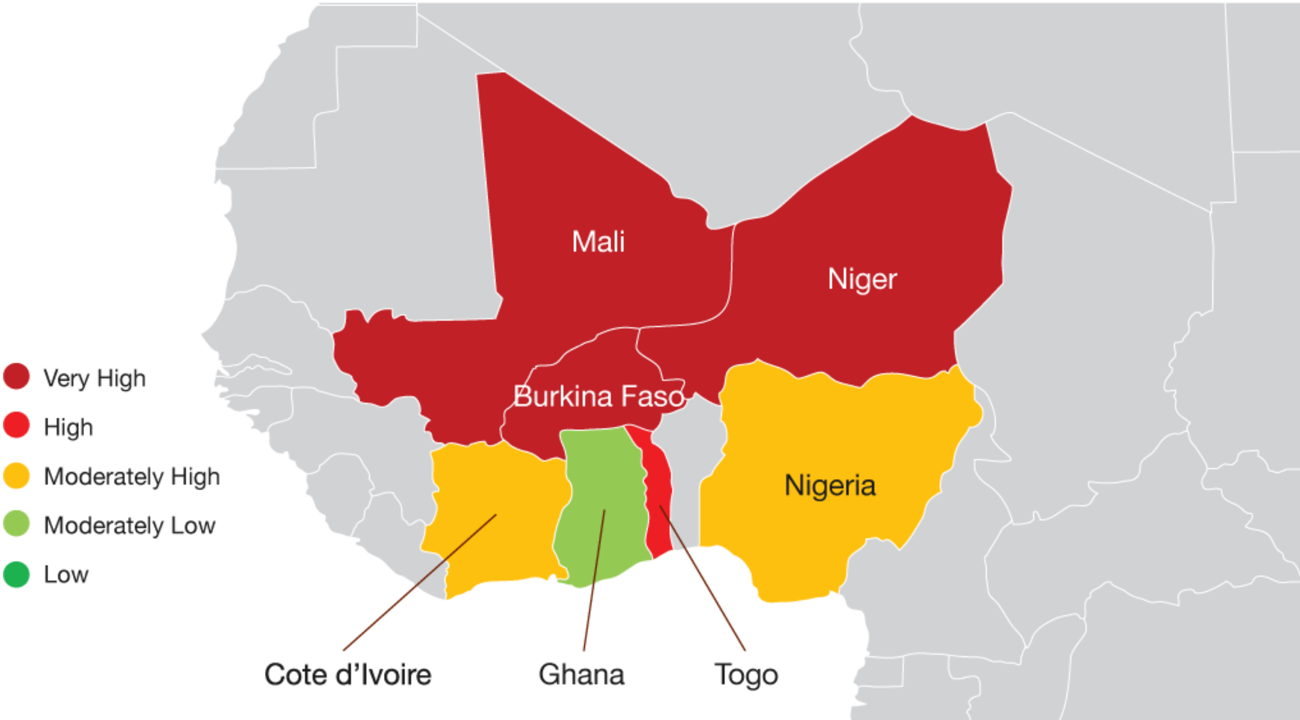

Figure 4: Prevalence of insufficient food consumption in selected West Africa countries, November 2020[5]

The number of people with insufficient food consumption across all the focus countries in West Africa[6] stood at 88.2 million for November. This figure is 1.6 percent lower than for October 2020, which suggests that the food security situation across the region generally deteriorated over the past month. Across the individual countries, only Nigeria recorded an increase (50.2 percent) in the number of people with insufficient food consumption. In contrast, Burkina Faso (-1.9 percent), Mali (-15.8 percent) and Niger (-5.1 percent) recorded a decrease in the number of people with insufficient food for consumption. In Cote d'Ivoire, Ghana and Togo, the number of people with insufficient food remained stable.

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[4] https://hungermap.wfp.org/ Accessed 30 November 2020.
[5] https://hungermap.wfp.org/ Accessed 30 November 2020
[6] Burkina Faso, Cote d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)		Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Burkina Faso	19.80	10.60	10.40	52.53%	-1.89%	↓	8.40%	24.90%
Cote d'Ivoire	25.10	5.20	5.20	20.72%	0.00%	●	6.10%	21.60%
Ghana	29.80	5.20	5.20	17.45%	0.00%	●	6.80%	17.50%
Mali	19.10	12.00	10.10	52.88%	-15.83%	↓	9.00%	26.90%
Niger	22.40	13.80	13.10	58.48%	-5.07%	↓	14.10%	48.50%
Nigeria	202.80	27.70	41.60	20.51%	50.18%	↑	6.80%	36.80%
Togo	7.90	2.60	2.60	32.91%	0.00%	●	5.70%	23.80%

● *= no change;* ↓ *= decrease,* ↑ *= increase, *Previous month and ** Current month*

[7] https://hungermap.wfp.org/ Accessed 30 November 2020

Food Trade Updates

East Africa

The latest Food Security and Nutrition Working Group report shows that cross border trade activities progressively improved since the third quarter of 2020. The improvement is expected to be sustained during the fourth quarter -supported by the exportable surplus from Ethiopia, Uganda and Tanzania alongside the easing of COVID-19 restrictions and streamlining of work process at the borders[8]. While most borders have been opened and cross border trade activities have resumed, some borders remain closed with COVID-19 testing activities continuing to lead to delays at some border posts. Borders that remain closed in the region include Kenya/ Somalia, Tigray with Eritrea, Eritrea, Djibouti and Sudan, Somalia/Ethiopia, Rwanda/Uganda, Rwanda/ Burundi[9].

Figure 5 provides an update of the various events and activities recorded and that remain in place at selected border posts and across different countries in East Africa over the past month that are impacting food trade in the region.

Figure 5: East Africa Cross border trade updates November 2020[10]

SOUTH SUDAN

- On 27 October, the governments of South Sudan and Sudan announced that they would be opening the border between the two countries for the first time since 2012 as part of a broader process targeted at improving cooperation and resolving territorial disputes.

UGANDA/KENYA

- Queues at the Kenya-Uganda borders (Malaba and Busia) have reduced on the Kenya side for out bound trucks from 14 kms on 8th November to 5 km on 16th November 2020.

ETHIOPIA

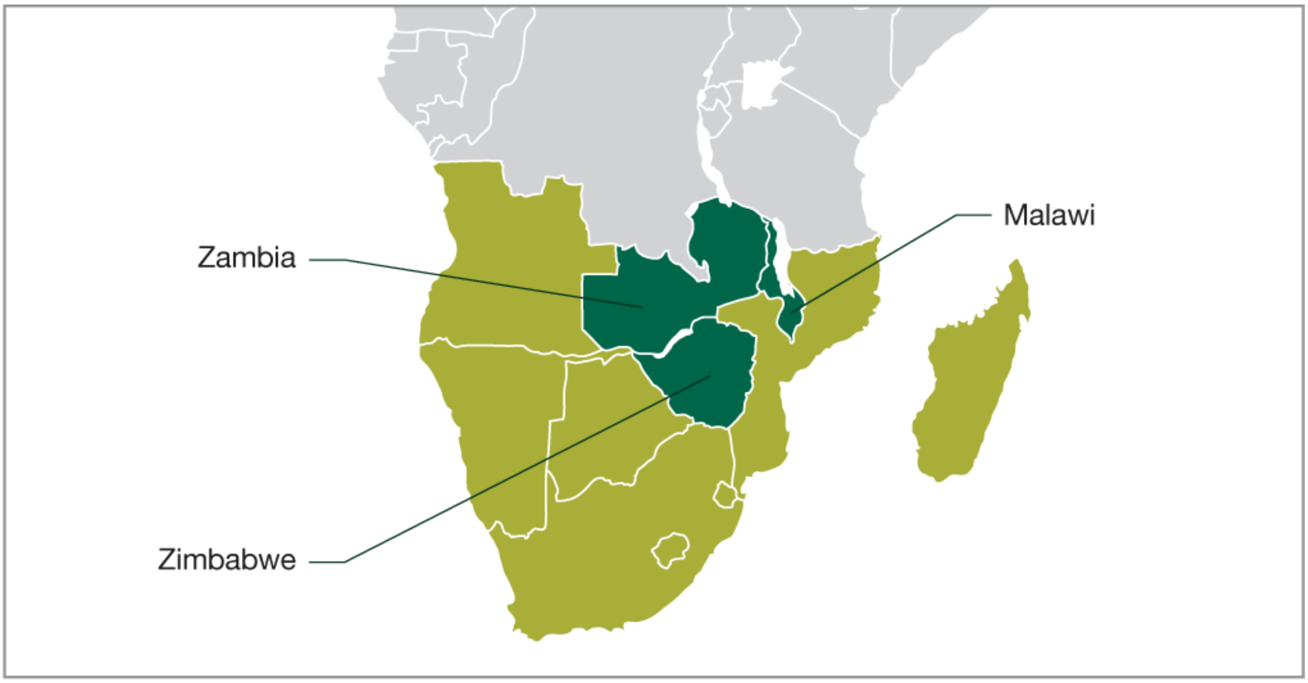
- Ongoing conflicts in the northern Tigray region have disrupted both domestic and cross border trade activities particularly for sesame traders.

[8] IPC East and Central Africa Regional Update, FSNWG Meeting, November 2020.
[9] IPC East and Central Africa Regional Update, FSNWG Meeting, November 2020.
[10] Author's compilation based on information from various secondary literature sources.

Southern Africa

Most borders remain open to commercial activities and movement of essential commodities and food. However, delays at the Beitbridge border post which have recently been worsened by the diversion of trucks from Botswana continue to create a challenge for efficient trade activities in the region. Following the announcement of the opening of the Zimbabwean border from the first of December 2020, there are expectations of an increase in cross-border trade activities and food remittances into Zimbabwe which will contribute to improved food security outcomes in the near term. Figure 6 summarises some of the key activities and events recorded across Southern Africa that have an impact on food trade activities in the region.

Figure 6: Southern Africa Food Trade Updates November 2020



MALAWI

- Smallholder farmers in Malawi have been struggling to sell their 300 000 MT of maize to the Agricultural Development and Marketing Corporation, (ADMARC) which has indicated that it had managed to secure financial resources enough to purchase only 80 000MT. This situation has created an opportunity for Malawi to lift its export restrictions on maize to avoid high post-harvest losses.

ZAMBIA

- In September, Finance Minister Bwalya Ng'andu announced that an increase in an import tariff on meat products from 25% to 40% would take effect from 1 January 2021 covering all fish and meat products imported from outside the Southern African Development Community (SADC) and Common Market for Eastern and Southern Africa (COMESA) regions.

ZIMBABWE

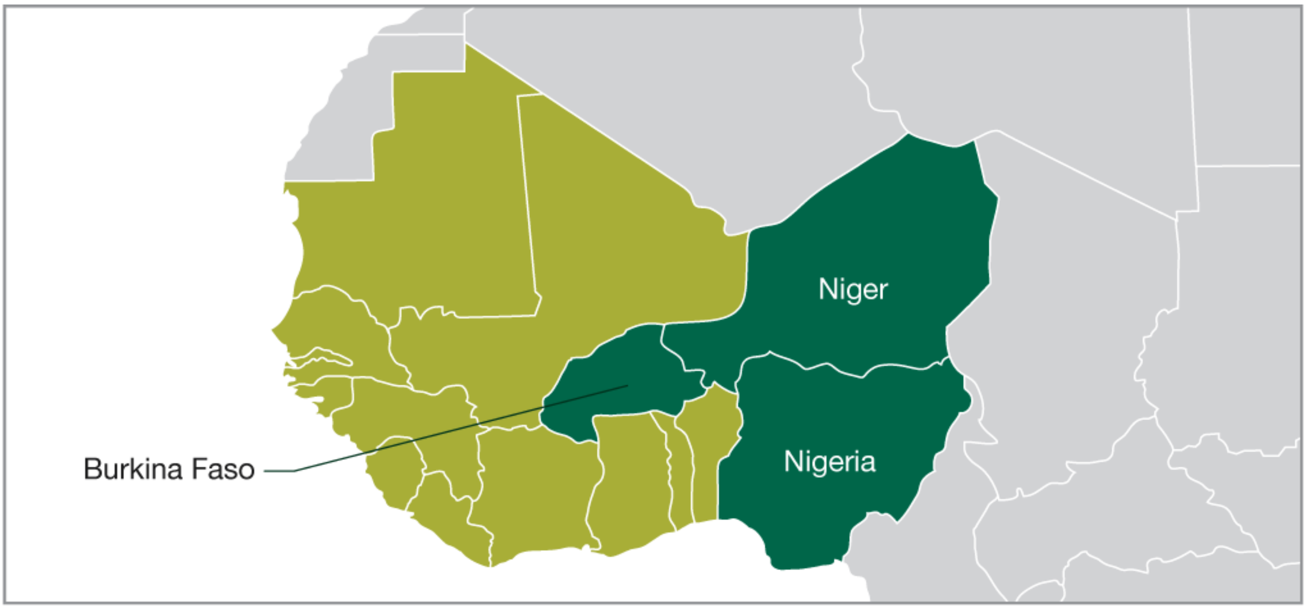
- There are reports of increasing delays at the Beitbridge border post, in part due to diversion of trucks from Botswana ports of entry, disrupting movement of maize and wheat into Zimbabwe.

West Africa

Most border posts in West Africa also remain open for commercial activities and trading of essential supplies and food commodities. Nigeria, which had recently closed off its border with Benin to stem the smuggling of rice, announced that it would soon be opening its land borders[11]. This move is expected to increase regional trade activities, including informal cross border trade activities with its key trade partners in the region. Farmers and traders in Niger's Maradi region (bordering Nigeria) are expected to benefit from the opening of the border following recent harvests. Further, Nigeria's recent ratification of the African Continental Free Trade Area (AfCFTA)[12] is expected to result in increased trade activities in the region.

Error! Not a valid bookmark self-reference. 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.

Figure 7: West Africa Cross border Trade Updates November 2020



NIGERIA

- The country ratified the African Continental Free Trade Area (AfCFTA) and announced that it will be opening land borders soon.
- The country has announced the opening of its land borders soon.

BURKINA FASO

- The security situation in the country continues to create challenges for trade activities from Ouagadougou to Ghana and Cote d'Ivoire.

NIGER

- Farmers and traders in the Maradi region (bordering Nigeria) continue to struggle to access markets in Nigeria as land borders remain closed. The situation is expected to improve as Nigeria land borders will be opened soon.

[11] https://allafrica.com/stories/202011260016.html Accessed 30 November 2020
[12] https://qz.com/africa/1932390/nigeria-ratifies-afcfta-despite-closed-benin-cameroon-borders/ Accessed 30 November 2020.

Agricultural Commodities' Price Monitoring

East Africa

Maize prices in most of the selected markets in the region indicate mixed results with slight increases in most of the selected markets (0-5% increase) compared to last month's prices. The latest prices in Kenya, Tanzania and Uganda showed a declining trend compared to the levels in the past 12 months. The projections for the next 3 and 6 months indicate contrasting pictures in Rwanda (overall decline in prices except in Kigali) and Tanzania (overall increase in prices).

In contrast, in Mekele (Ethiopia), Eldoret and Nakuru (Kenya), Nyaiheke Camp (Rwanda), Troit and Wau (South Sudan) and Kabale and Kampala (Uganda) prices have either decreased or remained constant compared to the previous month. Harvests in the Rift Valley contributed to decreasing prices in Kenya. Ongoing harvests in South Sudan and increased supplies from humanitarian aid following the flood crises contributed to dampening prices. The latest maize prices recorded high increases (more than 15%) compared to levels in the past three and six months in Ethiopia, Rwanda and South Sudan. The peak of the lean season in Rwanda contributed to the high increases in maize prices compared to the past 1, 3 and 6 months. The latest prices in Kenya, Tanzania and Uganda showed a declining trend compared to the levels in the past 12 months. The projections for the next 3 and 6 months indicate contrasting pictures in Rwanda (overall decline in prices except in Kigali) and Tanzania (overall increase in prices).

Table 4: Changes in maize prices in selected East African Countries[13]

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	0.16	10.54	24.19	5.59		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG	13	0.83	27.33	26.49	28.93		
Ethiopia	Maize (white)	Mekele, Ethiopian Birr/KG	13	-9.53	8.33	6.12	13.54		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	24	-16.97	-24.83	-27.68	-23.39		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	34	2.41	6.29	-1.99	-17.67		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	29	-0.35	-13.08	-24.05	-6.49		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG*	367	22.22	72.55	46.67	-24.40	-27.32	-25.32
Rwanda	Maize (white)	Kigali, Retail, RWF/KG**	311	7.97	33.01	18.87	-2.40	255.02	495.22
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG*	400	1.37	19.11	23.08	-20.00	-15.47	-18.07
Rwanda	Maize (white)	Mugera, Retail, RWF/KG*	307	2.22	23.77	13.58	-36.11	-9.74	-9.01
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG*	300	0.00	11.80	50.00	-46.43	-6.45	-6.81
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	315	25.71	39.59	116.97	225.44		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	357	60.75	69.70	95.15	164.05		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	386	3.53	49.34	76.01	168.39		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	172	0.00	9.09	17.65	36.98		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	286	-35.23	13.38	67.22	108.33		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	51,500	-3.16	-12.25	-15.44	-38.39	9.06	20.60
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	62,050	7.40	3.36	12.31	-27.34	21.53	25.38
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	59,625	3.52	-1.83	14.66	-23.41	3.42	-2.13
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	56,241	1.39	-2.57	-7.04	-33.60	20.25	10.23
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	61,000	1.67	-12.86	4.95	-30.68	3.83	2.62
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	699	-0.04	-10.66	-42.36	-34.27		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	711	-4.06	1.31	-39.50	-32.26		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	652	0.20	3.91	-43.31	-32.14		

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

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

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

Bean prices continue to show a rising trend in most of the selected markets, although there were some decreases in Rwanda, Tanzania and Uganda (Table 5). Comparing the latest price levels with those of the past 3, 6 and 12 months indicate a rising trend across all the countries except in Uganda. However, the projections for the next 3 and 6 months indicate a decreasing trend in Rwanda and parts of Tanzania while prices are expected to start increasing in Uganda.

Table 5: Changes in bean prices in selected East African Countries[14]

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*	657	3.69	13.22	45.93	9.90	-17.58	-12.94
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG*	756	-1.56	14.77	34.32	11.93	-7.94	-10.12
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG*	807	-8.10	22.53	69.83	2.98	-13.44	-16.19
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG*	850	3.03	39.73	41.67	-2.46	-23.05	-24.47
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	163,500	-8.59	2.19	1.87	1.32	11.64	11.66
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	217,400	16.17	27.18	7.62	20.20	-4.09	-11.37
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	205,000	3.27	14.29	-4.32	17.14	23.76	1.74
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	181,250	6.62	-2.68	-7.05	-0.01	8.45	10.89
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG**	228,985	-8.41	-8.41	10.80	33.13	4.07	8.94
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG	2,418	-17.45	-4.95	-30.21	-14.10		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG	2,373	-13.55	2.42	-20.95	12.25		

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

= 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 the latest month generally decreased in Ethiopia and selected markets in South Sudan compared to the previous one-month levels. In Rwanda, sorghum prices generally increased across selected markets except in Nyabiheke Camp, where they remained the same. Price changes of the latest month compared to the previous 3, 6 and 12 months indicate a generally rising trend. Juba recorded price increases of about 158% compared to the previous 12 months levels. The projections for the next 3 and 6 months show a declining trend in price levels in Rwanda except in the Nyabiheke Camp, which indicates increases above 15%.

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

Table 6: Changes in sorghum prices in selected East African Countries[15]

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	14	-0.36	7.34	32.76	9.45		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG	24	-1.94	-2.21	41.88	27.17		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG	477	8.33	22.22	14.63	-2.22	-16.99	-17.76
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	510	2.00	13.33	-7.27	4.62	-13.45	-13.47
Rwanda	Sorghum	Mugera, Retail, RWF/KG	400	42.86	29.03	0.00	5.26	-15.16	-15.98
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	156	-48.04	-41.63	8.37	103.75		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	360	62.11	73.28	95.64	158.32		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	315	2.33	62.96	87.07	112.77		
South Sudan	Sorghum	Torit, Retail, South Sudanese Pound/KG	172	0.00	20.00	20.00	72.41		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	358	-20.23	32.00	113.31	127.27		

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

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

Southern Africa

The latest maize prices in some markets in Malawi and Zambia remained constant compared to the previous month (Table 7). In Mozambique, the lastest prices increased from the previous one-month levels to as high as 17% in Gorongiza. There were also low (0-5%) and moderate (5-15%) increases in some markets in Malawi and Zambia compared to the previous one-month levels. Compared to the previous three months, maize prices indicate a rising trend in all countries. Despite the increases in price levels in the previous one and three months, the latest maize prices show that they are trending lower than in the previous 6 and 12 months in most of the markets. The projections for the next 3 and 6 months indicate an overall rising trend in Mozambique with maize prices in Zambia expected to increase as much as 72%.

Table 7: Changes in maize prices in selected Southern African Countries[16]

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**	155	3.33	-3.13	-29.55	-29.55		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	150	3.99	3.59	-5.66	-19.68		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	150	0.00	0.94	-28.66	-17.01		
Malawi	Maize (white)	National Average, Retail, MWK/KG	194	7.07	11.76	9.34	-17.53		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	212	7.72	7.17	38.69	-14.35		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG**	16	2.84	12.34	-39.44	-6.71	15.74	34.49
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	-20.24	-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	33.75	36.33
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

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

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

= 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

Maize prices in Nigeria continue to soar compared to the previous 3, 6 and 12 months with increases ranging from 10% to 136% in the selected markets. However, compared to the previous month, prices showed moderate decreases of up to 8%. For the rest of the countries, compared to the previous month, prices either remained constant or moderately decreased, except in Ghana which experienced increases between 11% and 17% and Mali which recorded some increases around 6%. Projections for the next three and six months continue to show prices decreases ranging from 1% to 30% in Cote d'Ivoire and Ghana.

Table 8: Changes in maize prices in selected West African countries[17]

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	-6.90	-3.23	-0.22	125.00	-13.00	-14.96
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	200	-5.88	-2.44	3.09	-11.11	-3.08	1.94
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	178	11.11	1.01	2.56	3.90	-18.03	-8.02
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	182	15.68	-15.12	-13.87	-3.22	-30.41	-27.19
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	108	13.36	0.00	-0.15	74.99	-19.96	-10.04
Mali	Maize (white)	Ansongo, Retail, XOF/KG	200	0.00	0.00	-4.76	-20.00	-4.78	-3.89
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	181	-2.16	7.10	3.43	6.47	-9.29	-6.90
Mali	Maize (white)	Faladié, Retail, XOF/KG	175	0.00	0.00	0.00	6.06	-9.75	-8.28
Mali	Maize (white)	Gao, Retail, XOF/KG	225	0.00	0.00	-10.00	0.00	-7.67	-0.54
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	250	6.38	21.95	25.00	25.00	-16.44	-15.76
Mali	Maize (white)	Niarela, Retail, XOF/KG	175	0.00	0.00	0.00	0.00	-8.27	-4.55
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	186	-6.33	10.46	67.93	133.00		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	176	-6.36	22.07	84.23	91.64		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	172	-8.04	22.24	71.34	136.31		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG**	197	-0.71	17.55	73.67	93.22		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	182	0.41	28.85	94.03	89.09		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	150	-5.06	0.00	7.14	15.38		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	140	0.00	3.70	7.69	21.74		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	140	-6.67	-0.71	3.70	32.08		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	160	-14.89	-5.33	4.58	28.00		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	140	-6.67	-4.11	3.70	22.81		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	190	-4.04	5.56	23.38	3.83		

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

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

Compared to the previous month, in Mali, prices for millet remained constant for most of the selected markets. The rest of the countries indicate low decreases (0-5%) in Burkina Faso and Nigeria as well as moderate decreases (5-15%) and high decreases (above 15%) in Niger and Nigeria. Some markets in Burkina Faso experienced high increases (above 15%) in millet prices compared to last

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

month's levels. Comparing the change in the latest prices with levels in the last 3, 6 and 12 months, there is an overall moderate (5-15%) and high increase (above 15%) in most of the selected markets. The current levels point to increases in millet prices that have implications on affordability, particularly given the challenges most vulnerable people have experienced due to impacts from the COVID-19 pandemic. Despite some increases in some markets indicated in the next 3 and 6 months (especially in Niger), prices in Mali and Burkina Faso indicate a declining trend.

Table 9: Changes in millet prices in selected West African countries[18]

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	251	15.67	23.65	34.22	17.29	-15.77	-15.72
Burkina Faso	Millet	Bousse, Retail, XOF/KG	208	16.20	-22.39	29.19	29.19	-8.09	-18.32
Burkina Faso	Millet	Dori, Retail, XOF/KG	253	-5.95	-5.24	2.43	13.96	-11.32	-3.97
Burkina Faso	Millet	Faramana, Retail, XOF/KG	184	3.37	21.85	30.50	68.81	-9.21	-11.94
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	226	-1.74	11.33	24.86	40.37	-7.73	-1.80
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	261	-1.51	13.97	21.96	31.16	-4.59	-0.43
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	195	-2.01	22.64	37.32	50.00	6.57	8.82
Burkina Faso	Millet	Titao, Retail, XOF/KG	160	-5.88	10.34	15.11	13.48	-14.95	0.12
Mali	Millet	Ansongo, Retail, XOF/KG	227	-0.44	-3.40	8.10	-9.20	-3.51	4.27
Mali	Millet	Badalabougou, Retail, XOF/KG	250	2.04	25.00	25.00	25.00	-6.29	-1.85
Mali	Millet	Faladié, Retail, XOF/KG	225	0.00	12.50	12.50	18.42	-8.27	-8.27
Mali	Millet	Gao, Retail, XOF/KG	265	0.00	6.00	6.00	12.77	-0.92	-3.16
Mali	Millet	Kayes Centre, Retail, XOF/KG	300	0.00	20.00	20.00	17.65	0.43	0.71
Mali	Millet	Niarela, Retail, XOF/KG	225	0.00	12.50	15.98	28.57	-2.32	7.85
Niger	Millet	Abalak, Retail, XOF/KG	267	-20.77	-17.34	-4.98	20.27	11.99	26.15
Niger	Millet	Bonkaney, Retail, XOF/KG	257	-16.01	-2.65	9.83	8.44	-3.13	4.81
Niger	Millet	Goure, Retail, XOF/KG	266	-19.15	-20.24	-5.92	13.19	3.62	23.16
Niger	Millet	Katako, Retail, XOF/KG	245	-20.20	-11.47	-3.92	14.49	3.32	14.34
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	234	11.43	23.00	86.01	108.93		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	158	-12.25	-3.64	45.57	82.26		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	167	-16.30	16.99	45.63	146.63		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	225	-4.75	22.84	62.43	85.40		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	170	-4.23	16.24	62.52	86.30		

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

= 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 indicate a declining trend compared to the previous one-month levels in most of the markets (Table 10). The declining trend was observed for Mali comparing the latest prices to levels in the previous 3, 6 and 12 months. Moderate price rises (5-15%) are observed in Niger and Togo, while Nigeria recorded high increases (above 15% rising as high as 193% compared to the last 12 months). Projections in Mali and Niger continue to show a declining trend in the next three and six months.

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

Table 10: Changes in sorghum prices in selected West African countries[19]

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	225	-1.32	-4.26	7.14	-10.00	0.11	-0.44
Mali	Sorghum	Badalabougou, Retail, XOF/KG	206	0.49	6.19	3.00	3.00	-9.22	-8.34
Mali	Sorghum	Faladié, Retail, XOF/KG	200	0.00	0.00	0.00	5.26	-7.89	-3.51
Mali	Sorghum	Gao, Retail, XOF/KG	250	0.00	0.00	0.00	-3.85	-3.56	-5.42
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	250	0.00	-1.19	0.00	0.00	-4.73	-6.52
Mali	Sorghum	Niarela, Retail, XOF/KG	200	0.00	14.29	14.29	14.29	-10.23	-1.94
Niger	Sorghum	Abalak, Retail, XOF/KG	279	-6.06	-5.58	9.09	30.99	0.69	19.35
Niger	Sorghum	Bonkaney, Retail, XOF/KG	260	-7.14	7.00	7.00	8.33	-2.14	-3.63
Niger	Sorghum	Goure, Retail, XOF/KG	264	-11.11	-12.58	9.09	33.33	-3.29	9.28
Niger	Sorghum	Katako, Retail, XOF/KG	282	0.00	12.80	17.50	42.42	1.24	-2.98
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	256	21.90	45.45	125.35	156.00		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	193	3.96	35.47	91.84	114.94		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	227	11.05	63.90	119.44	198.31		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	237	1.87	47.88	86.30	103.97		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	182	2.54	53.26	127.50	127.50		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	245	0.00	1.24	16.67	22.50		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	135	-6.90	9.76	1.50	13.45		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	265	1.92	0.00	8.16	38.02		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	130	-7.14	-0.76	-15.58	10.17		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	305	-4.69	8.93	24.49	9.71		

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

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

[19] 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 December are presented in Figure 8. Similar to the November forecast, above normal rainfall is projected for most of the Southern Africa region covering Malawi, Mozambique, Zimbabwe, eastern Zambia, central and eastern South Africa, and south-eastern Botswana. The above-normal rainfall, if it does not reach flooding levels, provides a conducive environment for the main growing season that just started in the region. However, the western parts of the region are projected to receive below normal rainfall. In East Africa, most of Tanzania, Rwanda and parts of Kenya are projected to receive above-normal rainfall. The above-normal rainfall in parts of the region with a dual season provides conducive planting conditions for farmers starting the short-rains season. The rest of the region is projected to receive below normal rainfall in December. Most parts of the West Africa region are projected to receive below normal rainfall, with average rainfall expected in the coastal areas.

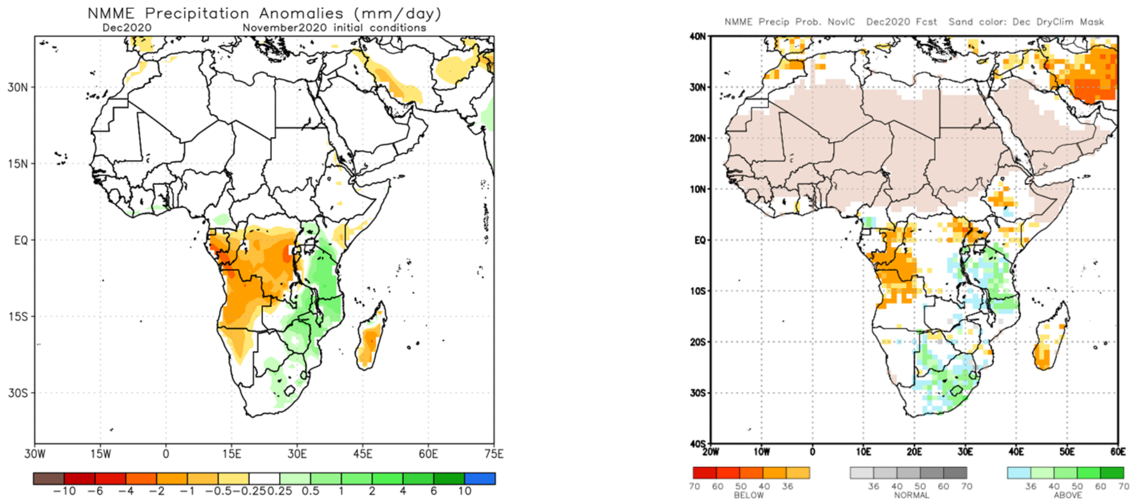


Figure 8: North American Multi-Model Ensemble (NMME) rainfall forecast for October 2020, based on September 2020 initial conditions[20]

[20] 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 category (below-normal or above-normal) forecast by the NMME models – colour intensity shows the corresponding probability of the forecast. White indicates where there is disagreement amongst models as the most likely tercile category. Original images are available at www.cpc.ncep.noaa.gov

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