



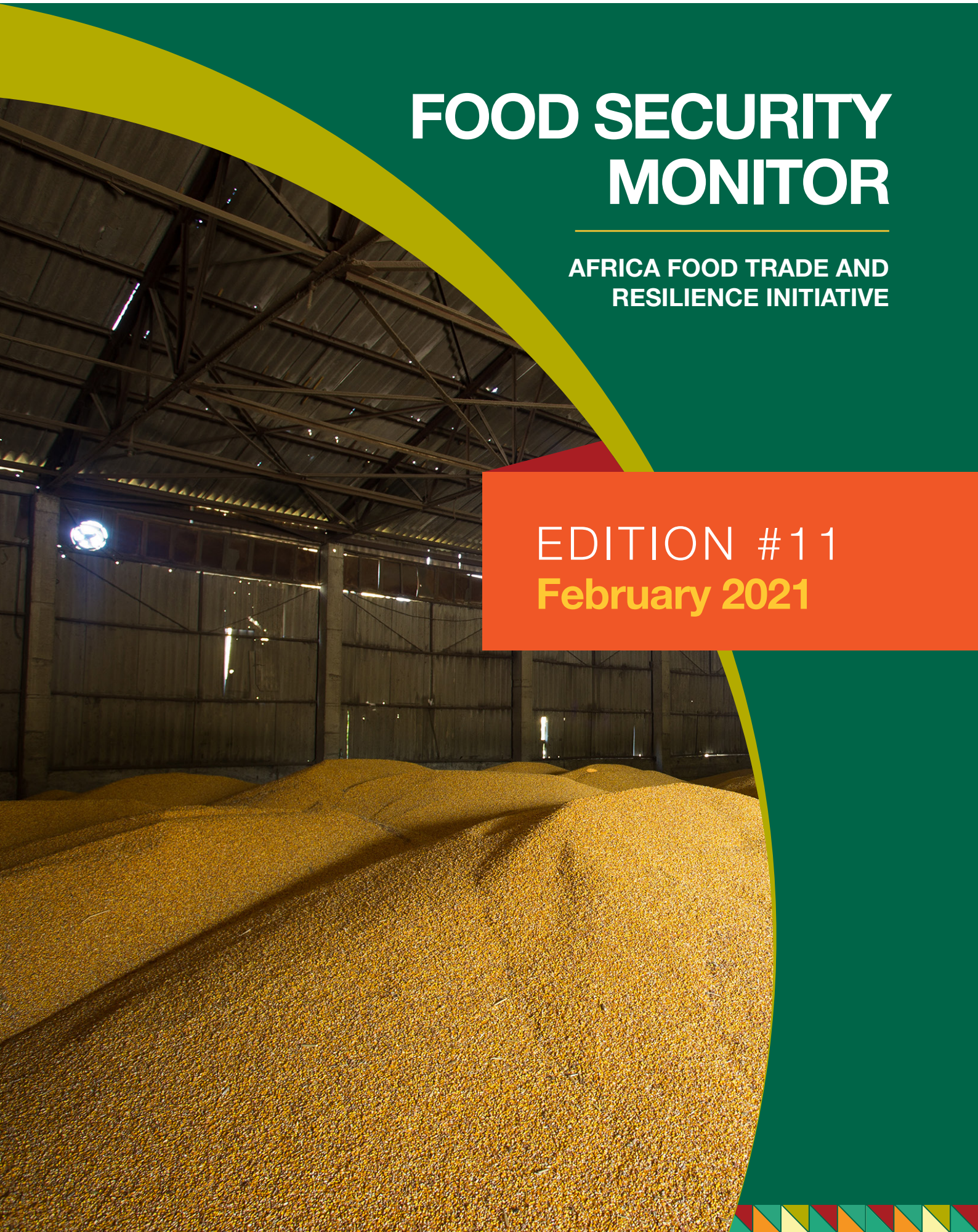
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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND
RESILIENCE INITIATIVE

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AGRA's Food Security Monitor provides 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.

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Summary

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 February Food Security Monitor are summarized below.

Food Security Outlook. The number of countries with very high food insecurity levels where more than 50% of the country's total population has insufficient food for consumption remained stable at four over the past two months. These countries include Burkina Faso, Mali, Niger, and South Sudan.

This seeming stability in the food security situation masks a worsening food security situation in East and Southern Africa reported over the last few months. However, in Southern Africa, the regional food security situation is expected to improve over the next couple of months as the harvest season begins. In West Africa, favourable harvests are sustaining a "minimal" food insecurity situation – though, in absolute numbers, food insecurity worsened in West Africa over the last month.

Food trade. In East Africa, continued trade tensions between Uganda and Kenya over the exporting of milk from Uganda to Kenya are adversely impacting dairy farmers in Uganda, prompting the Ugandan Government to consider escalating the matter to the East Africa Court of Justice. The commencement of the construction of the Uganda-Tanzania Road Project is expected to improve trader efficiencies between the two countries and the rest of the region.

In Southern Africa, COVID-19 restrictions and the closing of land borders by Zimbabwe disrupted informal cross border trade activities in February, resulting in many informal and illegal cross border activities. The Kazungula Bridge, which will improve trade from South Africa through Botswana and Zambia to countries north of South Africa, remains closed to traffic even though construction is completed.

In West Africa, trade activities in Nigeria have remained low despite the re-opening of borders. This is reported to have fuelled food inflation as farmers fail to meet domestic demand heightening the urgency for cross border trade.

Commodity prices. In East Africa, improvements in supplies from the Oct. 2020 – Jan. 2021 harvests contributed to the declining trend in maize prices, except in Ethiopia, Rwanda and South Sudan, where prices increased.

Compared to the previous month, maize prices in selected markets in Southern Africa indicate mixed results. Prices remained stable in some markets across the three countries, decreased in selected markets in Mozambique and Zambia, and increased overall in all three countries.

In West Africa, compared to the previous month, maize prices showed a mixed outlook across the selected markets. The forecast for the next 3 and 6 months point to a lean season with general increases in maize prices in Cote d'Ivoire, Ghana, and Mali.

Climatic conditions. In Southern Africa, rainfall forecasts indicate that most countries are expected to receive above-normal rainfall. Too much rainfall and flooding in some parts of the region increases the vulnerability of agriculture- and natural resource-based livelihoods.

In East Africa, the region's central and southern parts are projected to receive above-normal rainfall. More rainfall without extreme flooding would create conducive conditions for cropping activities for the March-May cropping season. However, northern parts of the region (especially northern parts of Ethiopia) are projected to receive below-normal rainfall.

The West Africa region's rainfall forecast indicates the same projections as last month, showing above-normal rainfall around the coastal region. For the coastal areas, the above-normal rainfall creates favourable cropping conditions for the starting seasonal crops. The rest of the region shows a forecast of below-normal rainfall.

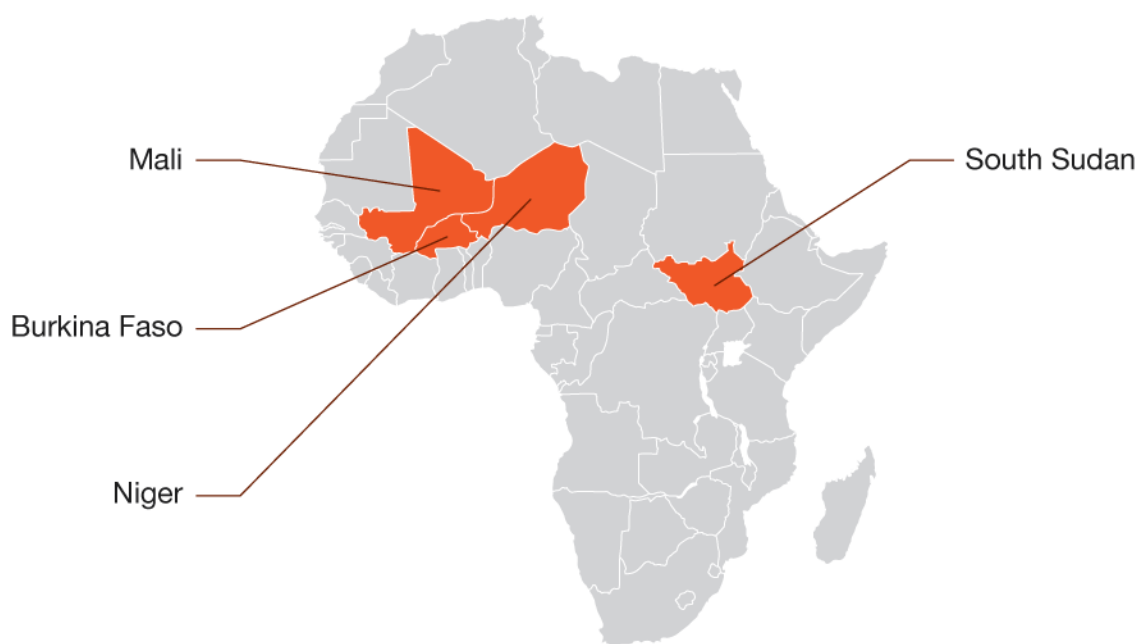
Introduction

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 food insecurity levels, where more than 50% of the country's total population has insufficient food for consumption, remained stable at four over the past two months. These countries include Burkina Faso, Mali, Niger, and South Sudan.

Figure 1: Early warning analysis of acute food insecurity hotspots, February 2021



Source: Own analysis based on data from WFP (2021)

East Africa

The East Africa region faced an IPC Phase 3 (Crisis) food security situation during February. East Africa's prevailing food security situation has been ascribed to conflict and displacement, long-term macroeconomic challenges, the economic impacts of COVID-19, multiple weather shocks, and the ongoing desert locust upsurge.¹The Food Security and Nutrition Working Group reports that the current desert locust upsurge in East Africa is the worst the region has experienced in the past 25 years. The prevailing macroeconomic situations across most parts of the region that have resulted in local currency depreciation and increased food prices have also contributed to the region's food security crisis. Continued conflicts in parts of the region, particularly in South Sudan and Ethiopia, are disrupting access to livelihood activities, access to food markets and food distribution efforts, thus contributing to increased food insecurity in the affected areas.

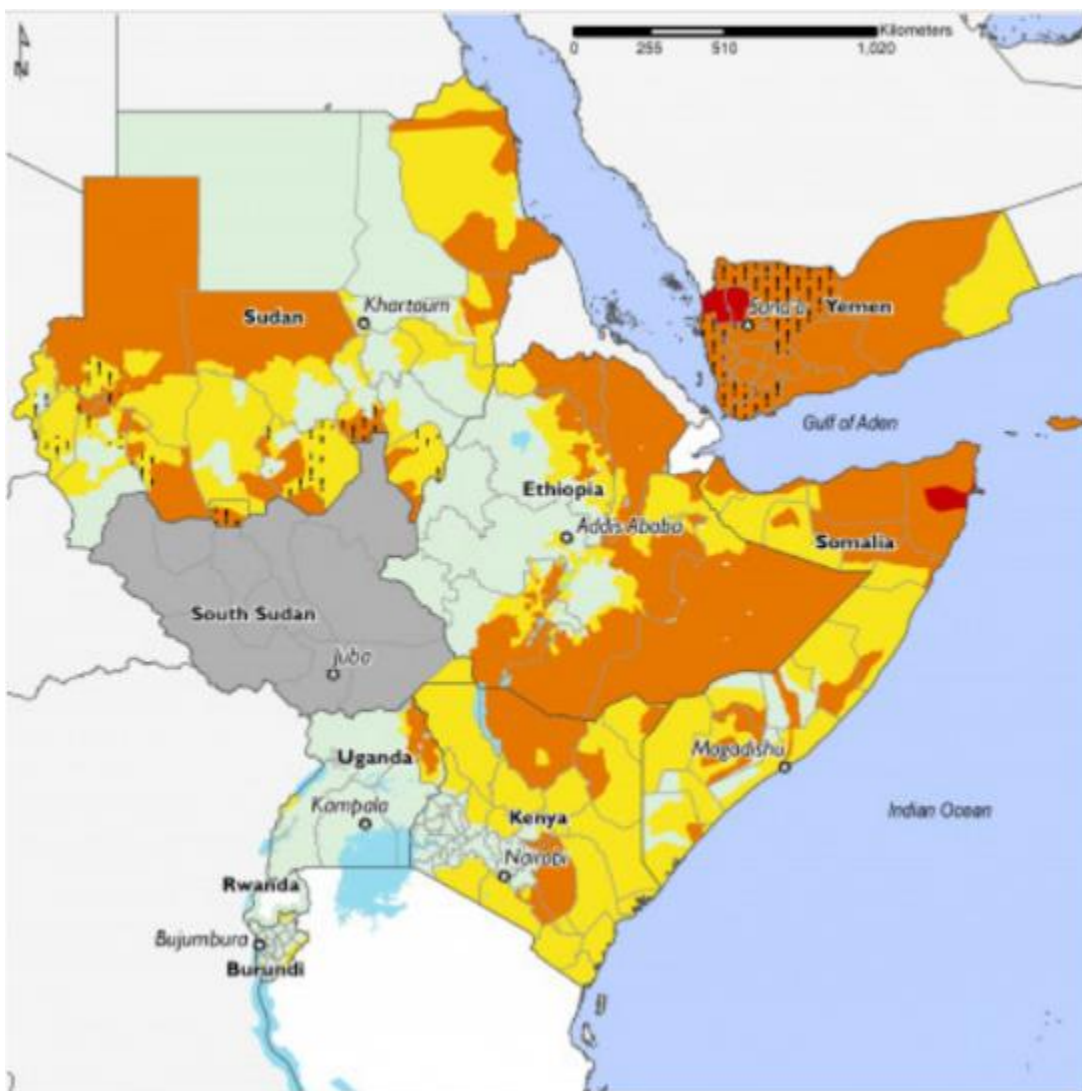


Figure 2: Prevalence of insufficient food consumption in selected East African countries, February-May 2021²

¹ <https://fews.net/east-africa> Accessed 01 March 2021

² <https://fews.net/east-africa> Accessed 01 March 2021

Prevalence of Insufficient Food Consumption in East Africa

The number of people with insufficient food for consumption across selected focus countries in East Africa stood at 52 million in February 2021. This figure is 8.8 percent higher than that reported in January 2021, suggesting that the food security situation has deteriorated over the past month across the region (Table 1³ Error! Reference source not found.).

Table 1: Prevalence of insufficient food consumption across selected East African countries (February 2021)³

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	14.80	14.90	13.64%	0.68%	7.20%	36.80%
Kenya	51.40	5.40	8.30	16.15%	53.70%	↑ 4.20%	26.20%
Rwanda	12.30	3.40	3.50	28.46%	2.94%	↑ 2.30%	38.30%
South Sudan	11.00	6.00	6.10	55.45%	1.67%	↑ 22.70%	31.30%
Tanzania	56.30	4.90	5.70	10.12%	16.33%	↑ 3.50%	31.80%
Uganda	42.70	13.30	13.50	31.62%	1.50%	↑ 3.50%	28.90%

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

Southern Africa

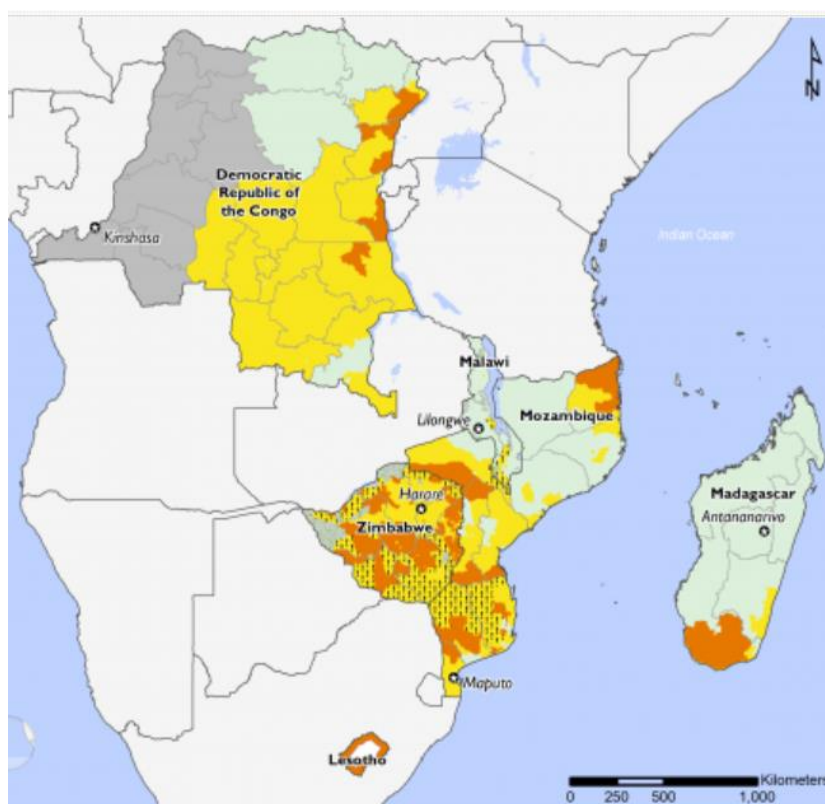


Figure 3: Southern Africa countries Food Security Outlook, February-May 2021¹

The food security outcomes in Southern Africa varied across and within selected focus countries over the past month. Malawi and the Northern parts of Mozambique experienced a minimal (IPC Phase 1) food security situation. In contrast, the Southern parts of Mozambique and most parts of Zimbabwe experienced Stressed (IPC Phase 2) and Crisis (IPC Phase 3) food security situations (Figure 3). The rising number of COVID-19 cases across countries in the region saw the reinstatement of lockdown restrictions and border closures, particularly in Zimbabwe, which resulted in disruption of livelihood activities contributing to the food security outcomes during the month. However, the region's food security is expected to improve over the next couple of months as the harvest season begins. Most countries are projected to receive above-average harvests following a favourable rainy season.

³ <https://hungermap.wfp.org/> Accessed 28 February 2021.

Prevalence of Insufficient Food Consumption in Southern Africa

The number of people with insufficient food for consumption across selected focus countries in Southern Africa stood at 22.3 million in February 2021 (*Table 2*). This figure is 5.7 percent higher than that of January 2020, suggesting that the food security situation has deteriorated across the region.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (February 2021)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	4.20	4.70	25.97%	11.90%	↑	1.30%	39.00%
Mozambique	29.50	9.80	9.00	30.51%	-8.16%	↓	4.40%	42.30%
Zambia	17.40	2.00	3.10	17.82%	55.00%	↑	4.20%	34.60%
Zimbabwe	14.40	5.10	5.50	38.19%	7.84%	↑	2.90%	23.50%

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

West Africa

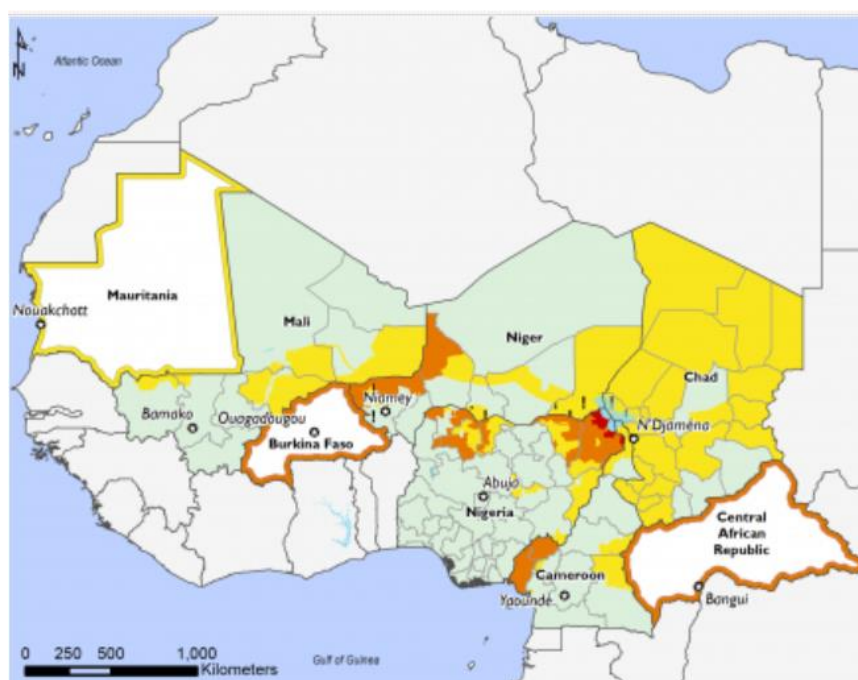


Figure 4: West Africa countries Food Security Outlook, February-May 2021¹

Most countries in West Africa and the Sahel Region faced a minimal (IPC Phase 1) food security situation during February (*Figure 4*). According to regional crop assessments forecasts, this food security outcome is expected to persist until May, sustained by favourable harvests, which will be above average 2020/21 for cereals across the region. Recent estimates by FEWSNET suggest that the 2020/21 aggregate cereal production for the West Africa and Sahel region is forecast to reach 74.7 million metric tons (MMT), similar to the previous year (2019/20) and above the previous five-year average (2015/16 to 2019/20)⁵. Maize and rice production are similar to the previous year, while sorghum and millet have

increased significantly. Opening food stocks during the month were reported to have been below average but are expected to increase progressively as market supplies from harvests increase in the upcoming months. Conflicts continue to disrupt marketing activities in some parts of the region, mainly in the Greater Lake Chad basin, the Liptako-Gourma region, northeast and northcentral Nigeria, and Northwest and Southwest regions of Cameroon.

⁴ <https://hungermmap.wfp.org/> Accessed 28 February 2021.

⁵ <https://reliefweb.int/report/nigeria/west-africa-regional-supply-and-market-outlook-january-12-2021>

Prevalence of Insufficient Food Consumption in West Africa

The number of people with insufficient food consumption across the focus countries in West Africa⁶ stood at 100.3 million for February 2021. This figure is 11.6 percent higher than for January 2021, which suggests that the region's food security situation generally deteriorated over the past month.

Table 3: Prevalence of insufficient food consumption in selected West Africa countries, February 2021⁷

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	10.40	12.10	61.11%	16.35%	↑	8.40%	24.90%
Cote d'Ivoire	25.10	3.90	5.00	19.92%	28.21%	↑	6.10%	21.60%
Ghana	29.80	5.50	5.50	18.46%	0.00%	●	6.80%	17.50%
Mali	19.10	10.10	9.60	50.26%	-4.95%	↓	9.00%	26.90%
Niger	22.40	15.10	12.70	56.70%	-15.89%	↓	14.10%	48.50%
Nigeria	202.80	42.00	52.60	25.94%	25.24%	↑	6.80%	36.80%
Togo	7.90	2.80	2.80	35.44%	0.00%	●	5.70%	23.80%

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

⁶ Burkina Faso, Cote d'Ivoire, Ghana, Mali, Niger, Nigeria, and Togo

⁷ <https://hungermap.wfp.org/> Accessed 29 January 2021

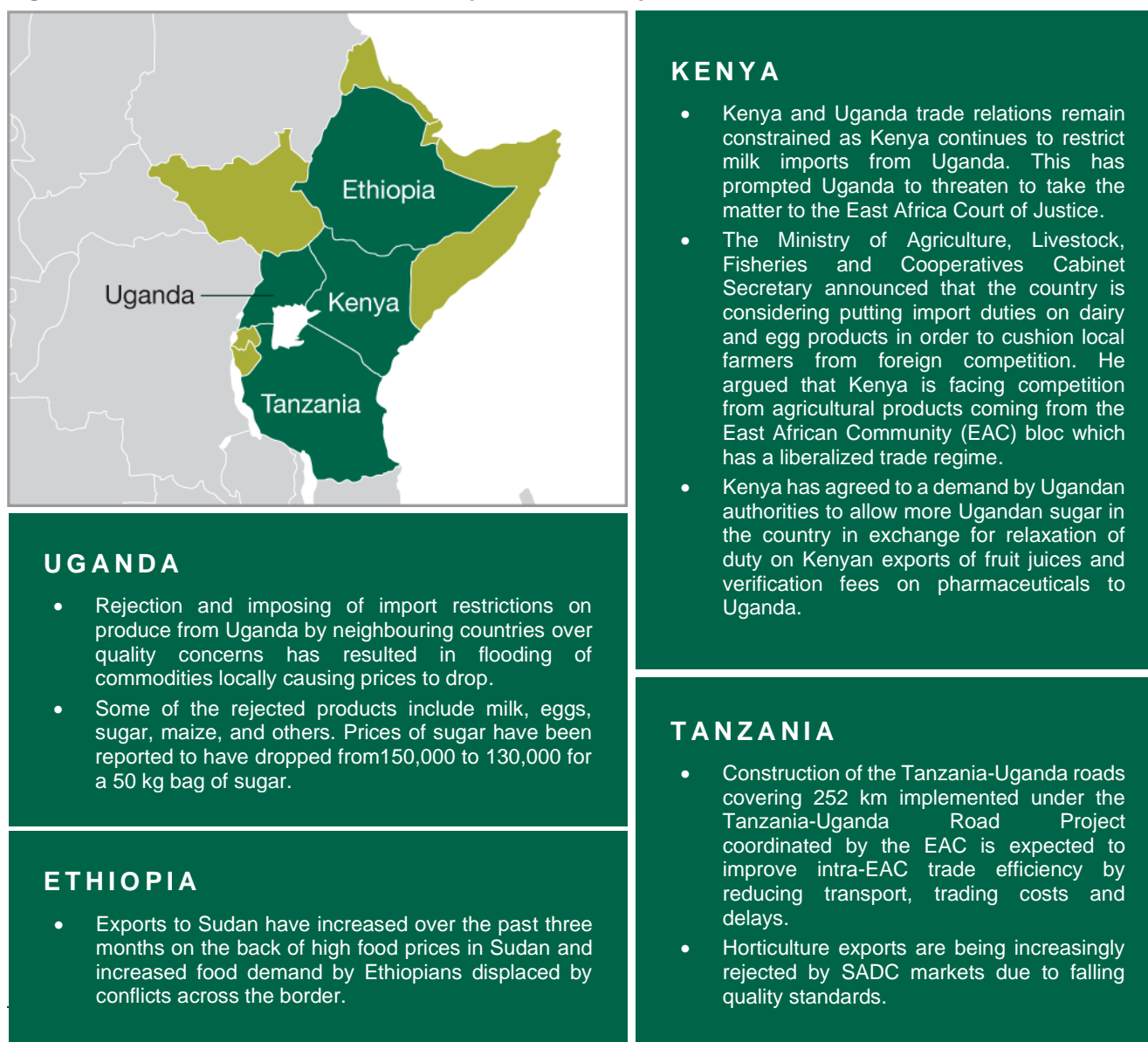
Food Trade Updates

East Africa

Continued trade tensions between Uganda and Kenya over the exporting of milk from Uganda to Kenya are adversely impacting dairy farmers in Uganda, prompting the Ugandan Government to consider escalating the matter to the East Africa Court of Justice. Uganda has also been faced with trade challenges as some of its products are being rejected and subjected to import restrictions by neighbouring countries due to quality concerns. This is likely to lead to a significant drop in prices as local markets become flooded with produce, which will affect the businesses of traders in the country. The commencement of the construction of the Uganda-Tanzania Road Project funded by the African Development Bank under its Nepad Infrastructure Project Preparation Facility is expected to improve trader efficiencies between the two countries and the rest of the region.

Figure 5 provides an update of the various events and activities recorded across different countries in East Africa over the past month that impact the food trade in the region.

Figure 5: East Africa Cross border trade updates February 2021⁸



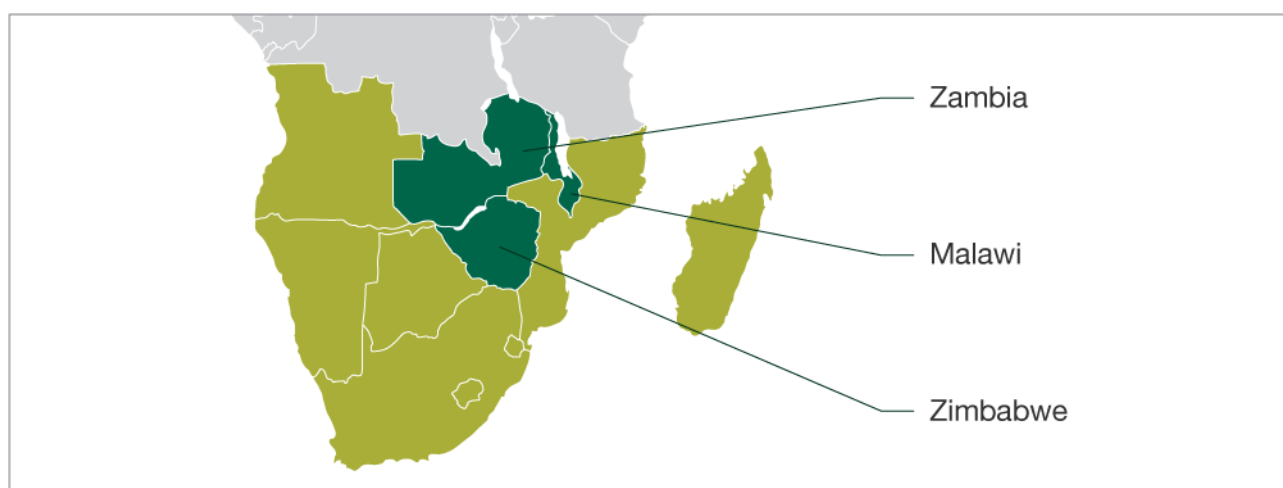
⁸ Author's compilation based on information from various secondary literature sources.

Southern Africa

COVID-19 restrictions and closing of land borders by Zimbabwe disrupted informal cross border trade activities during February, with reports suggesting that legal cross border movements dropped by over 95 percent, resulting in many informal and illegal cross border activities⁹. As the region approaches its harvest season, there have been calls by traders in other countries such as Malawi for government to ease export restrictions as the local market has been failing to absorb all the maize available on the market¹⁰. The Zambian government is still maintaining a ban on maize exports despite projections of a bumper harvest. Should this position be maintained and with other neighbouring countries in the region also projected to have above-average harvests, there is a potential risk of having few regional market opportunities for traders in the country, which may cause prices to plummet as the harvest season kicks in. The Kazungula Bridge, which is set to improving trading efficiencies from South Africa through Botswana and Zambia to countries north of South Africa, remains closed to traffic despite construction having been completed.

Figure 6 summarises some of the key activities and events recorded across Southern Africa that impact food trade activities.

Figure 6: Southern Africa Food Trade Updates in February 2021



ZIMBABWE

- The closure of the South Africa-Zimbabwe border at Beitbridge to curb spread of COVID-19 resulted in a 95 percent drop in legal cross-border movements, and an almost 100 percent surge in border jumping, according to official figures.

MALAWI

- Ministry of Trade says it plans to lift the maize export ban to allow traders to sell the staple grain to neighbouring countries. The decision follows a request by Grain Traders and Processors Association (GTPA) of Malawi who have been asking government to lift the ban due to the availability of maize which the local market cannot absorb.

ZAMBIA

- The Proudly Zambian Campaign which is set to reduce import dependency and increase consumption of locally produced goods is set to reduce exports to Zambia from other countries in the region. The President of Zambia announced that 33 companies covering 500 products have been certified under this campaign.
- Country continues to restrict exports of maize despite projections of a bumper harvest.

⁹ <https://southerntimesafrica.com/site/news/border-jumpers-reversing-lockdown-gains>

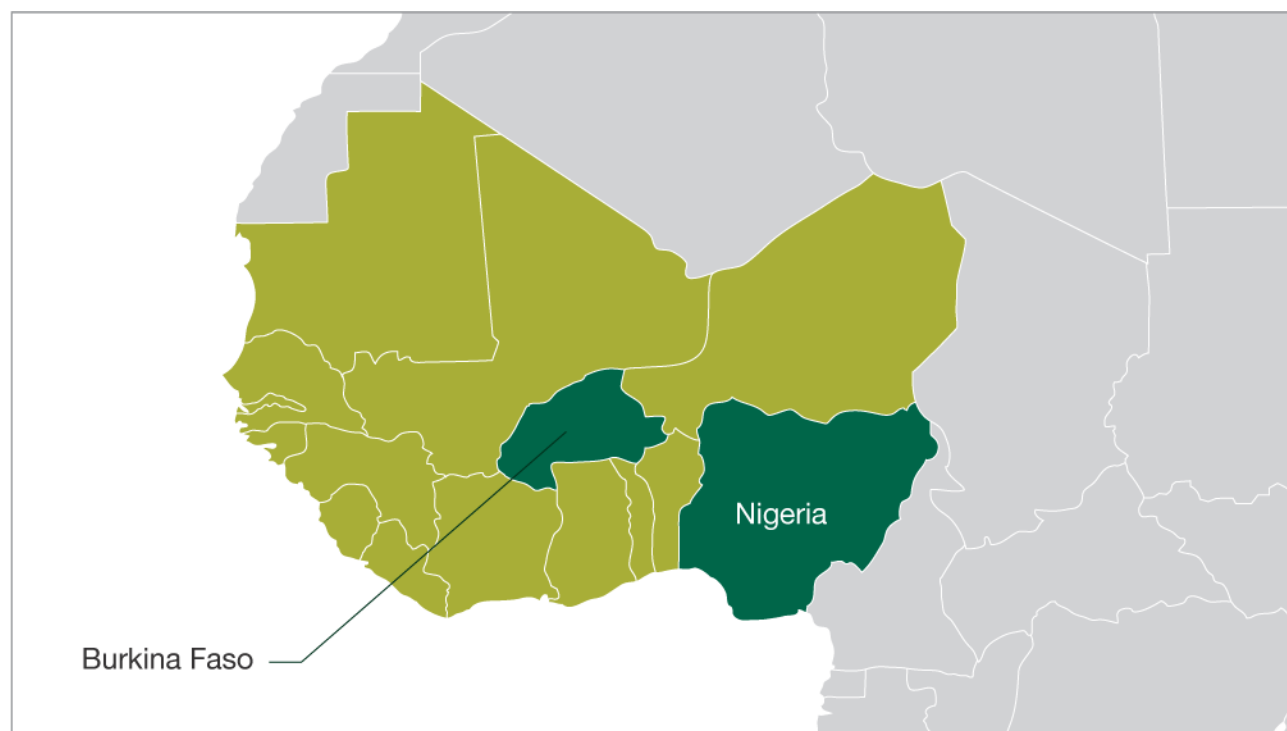
¹⁰ <https://www.mwnation.com/ministry-set-to-lift-maize-export-ban/>

West Africa

There were no new major events recorded in West Africa over during February that have a material impact on cross border trade activities. However, trade activities in Nigeria have remained low despite the re-opening of borders. This is reported to have fuelled food inflation as farmers fail to meet domestic demand heightening the urgency for cross border trade¹¹.

Figure 7 provides an update of issues and events reported in selected West African countries that impact food trade and food security in the region.

Figure 7: West Africa Cross border Trade Updates February 2021



NIGERIA

- Trade activities have not returned to normal despite the reopening of borders in December. This has resulted in a continuous increase in food inflation as local farmers are failing to meet domestic food demand.

BURKINA FASO

- Relaxing of border controls with Cote d'Ivoire which have allowed movement passenger buses has increased trade activities between the two countries, but trade volumes remain below pre-Covid levels.

¹¹ <https://www.theafricareport.com/67015/nigerias-food-inflation-shows-urgency-of-cross-border-trade/>

Agricultural Commodities' Price Monitoring

East Africa

Maize prices indicate an overall declining trend in most markets in the region in line with seasonal patterns. Improvements in supplies from the October 2020 – January 2021 harvests contributed to the declining trend in maize prices (Table 4). Compared to the past 6 and 12 months, maize prices indicate moderate (5-15%) and high decreases (above 15%) in Kenya, Tanzania and Uganda. On the contrary, high increases (above 15%) were recorded in Ethiopia, Rwanda and South Sudan. The forecasts for the next 3 and 6 months show an overall declining trend due to improvements in seasonal supplies from the March-May cropping season.

Table 4: Changes in maize prices in selected East African Countries¹²

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**	13	5.16 ↑	8.16 ↑	32.90 ×	25.00 ×		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG**	13	-0.41 ↘	15.78 ×	17.83 ×	15.78 ×		
Ethiopia	Maize (white)	Mekele, Ethiopian Birr/KG**	14	5.27 ↑	3.79 ▲	24.41 ×	19.00 ×		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	25	-2.39 ↘	2.12 ▲	-23.07 ↓	-28.91 ↓		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	35	5.83 ↑	3.00 ▲	9.67 ↑	-4.88 ↘		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	27	0.48 ▲	-5.46 ↓	-17.68 ↓	-12.93 ↓		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG	392	3.30 ▲	30.56 ×	56.67 ×	-12.96 ↓	-28.37 ↓	-11.25 ↓
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	426	0.13 ▲	7.85 ↑	41.85 ×	-18.94 ↓	-10.91 ↓	-18.19 ↓
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	330	-3.42 ↘	10.00 ↑	25.32 ×	10.00 ↑	-25.43 ↓	-11.18 ↓
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	314	-1.89 ↘	4.65 ▲	17.37 ×	-7.66 ↓	-7.40 ↓	-10.04 ↓
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	212	-21.23 ↓	-32.55 ↓	-5.84 ↓	135.55 ×		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	420	-1.94 ↘	13.09 ↑	99.59 ×	210.56 ×		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	350	-14.52 ↓	-12.00 ↓	35.51 ×	91.41 ×		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	200	0.00 ●	7.69 ↑	27.27 ×	59.09 ×		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	286	-14.31 ↓	0.00 ●	13.38 ↑	93.43 ×		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	53,750	2.49 ▲	4.37 ▲	-8.41 ↓	-41.89 ↓	21.53 ×	-6.19 ↓
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	58,075	1.99 ▲	-6.41 ↓	-3.26 ↘	-38.28 ↓	-13.61 ↓	-39.48 ↓
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	54,778	-0.29 ↘	-8.13 ↓	-9.81 ↓	-42.98 ↓	-17.54 ↓	-23.45 ↓
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	61,500	7.74 ↑	9.35 ↑	6.55 ↑	-33.64 ↓	-10.04 ↓	-29.25 ↓
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	65,500	0.77 ▲	7.38 ↑	-6.43 ↓	-24.60 ↓	-2.12 ↘	-2.64 ↘
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	599	-23.18 ↓	-14.86 ↓	-23.51 ↓	-42.99 ↓		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	665	-11.44 ↓	-6.82 ↓	-5.22 ↓	-39.94 ↓		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	588	-11.17 ↓	-9.74 ↓	-6.39 ↓	-38.28 ↓		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	520	-18.14 ↓	-16.85 ↓	-12.98 ↓	-45.37 ↓		

Note: Last price is for January 2021, *December, **November, ***October and ****September

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

As the past month, bean prices continue to show a declining trend compared to the past 1, 3, 6 and 12 months in most of the selected markets, although few exceptions of price increases were recorded (Table 5). Low prices contribute to improving accessibility of the nutritious legume crop to consumers contributing positively to food and nutrition security in the region. The forecasts for the next 3 and 6 months show a rising trend in prices than the forecast in the past month. In contrast, bean prices are expected to decrease in most markets in Tanzania.

¹² Author's construction based on data from WFP (2021) and FAO (2021)

Table 5: Changes in bean prices in selected East African Countries¹³

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	467	-16.91 ↓	-26.31 ↓	-17.04 ↓	13.13 ↑	28.12 ×	39.07 ×
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	522	-9.18 ↓	-31.96 ↓	-15.77 ↓	-8.38 ↓	7.63 ↑	4.60 ▲
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	490	10.32 ↑	-44.18 ↓	-19.53 ↓	18.55 ×	18.05 ×	23.62 ×
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	480	-32.30 ↓	-41.87 ↓	-20.76 ↓	-0.43 ↘	28.91 ×	21.73 ×
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	176,000	-4.58 ↘	7.65 ↑	10.00 ↑	3.67 ▲	2.95 ▲	-4.31 ↘
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	209,250	-6.32 ↓	-3.75 ↘	22.41 ×	3.36 ▲	-16.28 ↓	-8.29 ↓
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	156,111	-8.84 ↓	-23.85 ↓	-12.97 ↓	-26.93 ↓	-9.00 ↓	-14.85 ↓
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	213,333	1.29 ▲	17.70 ×	14.54 ↑	8.52 ↑	-6.06 ↓	-13.83 ↓
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	205,000	1.23 ▲	-4.80 ↘	-16.89 ↓	-11.35 ↓	-1.81 ↘	-9.72 ↓
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG	2,522	25.17 ×	3.05 ▲	-0.84 ↘	-5.18 ↓		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG*	1,649	-22.18 ↓	-39.90 ↓	-24.64 ↓	-18.45 ↓		

Note: Last price is for January 2021, *December, **November, ***October and ****September

● = 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 sorghum prices for February indicate decreases ranging from low (0-5%) and moderate decreases (5-15%) in Ethiopia, Rwanda and South Sudan. Exceptions of high increases (above 15%) were recorded in South Sudan (Table 6). Compared to the past 6 and 12 months, the prices have significantly increased (above 15% increases) in most of the selected markets. The ongoing conflict in the Ethiopian Tigray region will likely contribute to rising food prices in the affected areas through disrupting trade activities. The forecast for the next 3 and 6 months for Rwanda show an overall declining trend as new seasonal supplies improve.

Table 6: Changes in sorghum prices in selected East African Countries¹⁴

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**	13	-6.35 ↓	-0.76 ↘	15.89 ×	1.70 ▲		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG**	23	-4.49 ↘	-13.37 ↓	25.48 ×	15.75 ×		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG	450	-5.26 ↓	-5.60 ↓	15.38 ×	-11.27 ↓	-1.76 ↘	-14.81 ↓
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	477	-1.12 ↘	-6.54 ↓	5.93 ↑	-13.33 ↓	-1.82 ↘	-13.47 ↓
Rwanda	Sorghum	Mugera, Retail, RWF/KG	450	-6.25 ↓	12.50 ↑	45.16 ×	23.29 ×	6.24 ↑	-10.76 ↓
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	480	0.00 ●	23.08 ×	60.00 ×	24.68 ×	0.36 ▲	-4.32 ↘
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	261	15.99 ×	64.38 ×	-2.87 ↘	225.25 ×		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	419	-2.47 ↘	11.84 ↑	101.65 ×	195.75 ×		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	290	-1.17 ↘	-9.95 ↓	50.08 ×	74.66 ×		
South Sudan	Sorghum	Torit, Retail, South Sudanese Pound/KG	200	0.00 ●	16.67 ×	40.00 ×	75.00 ×		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	343	17.07 ×	-5.88 ↓	26.72 ×	171.50 ×		

Note: Last price is for January 2021, *December, **November, ***October and ****September

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

¹³ Author's construction based on data from WFP (2021) and FAO (2021).

¹⁴ Author's construction based on data from WFP (2021) and FAO (2021).

Southern Africa

Compared to the previous month, maize prices in selected markets in Southern Africa indicate mixed results. Prices remained stable in some markets across the three countries, decreased in selected markets in Mozambique and Zambia, and increased overall in all three countries (Table 7). Compared to the previous 3 and 6 months, the changes in current prices show that price levels significantly increased (by more than 15% in most cases) in most of the markets in Malawi and Mozambique. This is in line with seasonal trends as the season is lean and the region is in the middle of the main cropping season. However, Zambia's situation is different as current prices are lower than in the past 6 months. Compared to the past 12 months, current prices have decreased in most of the country's selected markets. The outlook for the next 3 and 6 months show that prices are expected to decrease in Mozambique while increases are expected in Zambia. It is important to note that Zambia's prices were last updated in October 2020. The results below reflect the lean season period and not the expected harvest increases at the end of the season.

Table 7: Changes in maize prices in selected Southern African Countries¹⁵

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*	200	0.00 ●	29.03 ⊗	25.00 ⊗	-38.78 ↓		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	187	15.67 ⊗	24.53 ⊗	29.01 ⊗	-20.85 ↓		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	180	5.88 ↑	20.00 ⊗	21.13 ⊗	-25.23 ↓		
Malawi	Maize (white)	National Average, Retail, MWK/KG*	205	2.44 ▲	5.99 ↑	18.45 ⊗	-34.95 ↓		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG*	232	8.85 ↑	9.52 ↑	17.37 ⊗	-28.49 ↓		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	17	0.00 ●	7.13 ↑	21.56 ⊗	-26.85 ↓	-17.74 ↓	-21.65 ↓
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	32	13.34 ↑	25.94 ⊗	20.37 ⊗	13.34 ↑	-2.16 ↔	-16.83 ↓
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	30	10.35 ↑	33.33 ⊗	39.18 ⊗	-23.80 ↓	-6.46 ↓	-14.99 ↓
Mozambique	Maize (white)	Pemba, Retail, MZN/KG	27	-11.57 ↓	-8.15 ↓	43.25 ⊗	-4.48 ↔	13.37 ↑	5.83 ↑
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG***	3	22.43 ⊗	50.00 ⊗	-25.00 ↓	-13.51 ↓	-15.32 ↓	-17.72 ↓
Zambia	Maize (white)	Chipata, Retail, ZMW/KG***	3	-1.61 ↔	7.37 ↑	-16.62 ↓	0.33 ▲	7.84 ↑	8.50 ↑
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG***	3	6.12 ↑	0.00 ●	-41.00 ↓	-30.59 ↓	17.97 ⊗	8.14 ↑
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG***	4	0.00 ●	8.11 ↑	-34.07 ↓	-14.89 ↓	25.00 ⊗	20.00 ⊗
Zambia	Maize (white)	Mpika, Retail, ZMW/KG***	3	0.00 ●	0.00 ●	-39.86 ↓	26.54 ⊗	29.21 ⊗	51.69 ⊗

Note: Last price is for January 2021, *December, **November, ***October and ****September

● = 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 show a mixed outlook across the selected markets. Prices remained the same or declined, such as in some markets in Cote d'Ivoire, Mali, and Togo, while moderate (5-15%) to high (above 15%) increases were reported in some markets in Cote d'Ivoire and Nigeria (Table 8). Compared to the past 3 months, current prices have mainly declined or remained the same in most of the selected markets, with exceptional cases of high increases (above 15%) recorded in Ghana and Nigeria. The prices in most of the selected markets indicate moderate (5-15%) and high (above 15%) increases in current maize prices compared to the previous 12 months. The forecast for the next 3 and 6 months point to a lean season with general increases in maize prices in Cote d'Ivoire, Ghana, and Mali.

¹⁵ Author's construction based on data from WFP (2021) and FAO (2021).

Table 8: Changes in maize prices in selected West African countries¹⁶

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	250	25.00	3.45	5.26	150.00	23.18	8.84
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG	200	0.00	-5.88	-25.58	-11.11	25.22	24.01
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	233	36.36	31.25	32.57	40.00	1.78	3.30
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	160	-8.53	12.22	49.16	47.45	-8.73	-0.45
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	289	50.00	59.11	35.05	81.48	-10.62	25.09
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	154	-12.99	43.00	43.00	66.83	24.83	65.43
Mali	Maize (white)	Ansongo, Retail, XOF/KG*	220	0.00	10.00	10.00	10.00	-4.85	-3.40
Mali	Maize (white)	Badalabougou, Retail, XOF/KG*	165	-5.71	-10.81	-10.81	3.13	8.00	10.64
Mali	Maize (white)	Faladié, Retail, XOF/KG*	175	0.00	0.00	16.67	16.67	-1.96	2.41
Mali	Maize (white)	Gao, Retail, XOF/KG*	225	0.00	0.00	0.00	0.00	13.59	22.78
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG*	200	-18.03	-14.89	0.00	-1.96	5.53	13.46
Mali	Maize (white)	Niarela, Retail, XOF/KG*	175	0.00	0.00	0.00	12.90	1.33	7.31
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG*	166	9.03	-10.94	-1.63	66.00		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG*	152	6.49	-13.31	5.82	78.25		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG*	161	10.09	-6.15	14.72	95.42		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG*	161	10.14	-18.21	-3.86	53.88		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG*	150	0.84	-17.58	6.19	79.10		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	140	3.70	-6.67	-6.67	12.00		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	160	-7.51	14.29	18.52	28.00		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	133	0.00	-5.00	-5.67	0.76		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	192	0.00	20.00	13.61	28.00		
Togo	Maize (white)	Kor bongou, Retail, CFA Franc BCEAO/KG	140	3.70	0.00	-4.11	12.00		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	192	0.00	1.05	6.67	24.68		

Note: Last price is for January 2021, *December, **November, ***October and ****September

= 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 seasonal trend indicates declining prices for millet for most of the selected markets except for few markets in Burkina Faso, Niger, and Nigeria, where prices increased compared to the previous 1 and 3 months (Table 9). This is due to improved seasonal supplies. Compared to the last 12 months that correspond to when the first cases on COVID-19 were reported across the continent, the output indicates high increases in prices (more than 15%) except in few markets in Burkina Faso, Mali, and Niger. The price forecast for the next 3 and 6 months indicate a general increase in millet prices. The projected price increase highlights lean supplies that will push prices upwards, making food more inaccessible to vulnerable households, particularly those who lost their livelihood sources of incomes due to the COVID-19 pandemic.

¹⁶ Author's construction based on data from WFP (2021) and FAO (2021).

Table 9: Changes in millet prices in selected West African countries¹⁷

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	221	-12.65 ↓	-11.95 ↓	8.87 ↑	17.55 ×	10.71 ↑	16.72 ×
Burkina Faso	Millet	Bousse, Retail, XOF/KG	179	-3.76 ↘	-13.94 ↓	-33.21 ↓	11.18 ↑	-10.42 ↓	9.98 ↑
Burkina Faso	Millet	Dori, Retail, XOF/KG	250	0.00 ●	-1.19 ↘	-6.37 ↓	5.93 ↑	8.37 ↑	13.86 ↑
Burkina Faso	Millet	Faramana, Retail, XOF/KG	132	-3.65 ↘	-28.26 ↓	-12.58 ↓	0.00 ●	-1.33 ↘	4.42 ▲
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	221	8.33 ↑	-2.21 ↘	8.87 ↑	28.49 ×	3.68 ▲	9.38 ↑
Burkina Faso	Millet	Ouagadougou (Sankaryare), Retail, XOF/KG	249	1.22 ▲	-4.60 ↘	8.73 ↑	16.36 ×	4.03 ▲	2.98 ▲
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	197	-14.72 ↓	1.03 ▲	23.90 ×	40.71 ×	25.70 ×	27.33 ×
Burkina Faso	Millet	Titao, Retail, XOF/KG	162	8.72 ↑	1.25 ▲	11.72 ↑	19.12 ×	16.76 ×	20.90 ×
Mali	Millet	Ansongo, Retail, XOF/KG*	275	0.00 ●	20.61 ×	17.02 ×	37.50 ×	6.00 ↑	6.74 ↑
Mali	Millet	Badalabougou, Retail, XOF/KG*	225	-10.00 ↓	-8.16 ↓	12.50 ↑	2.27 ▲	5.33 ↑	6.25 ↑
Mali	Millet	Faladié, Retail, XOF/KG*	200	-11.11 ↓	-11.11 ↓	0.00 ●	8.11 ↑	5.20 ↑	6.69 ↑
Mali	Millet	Gao, Retail, XOF/KG*	265	0.00 ●	0.00 ●	6.00 ↑	6.00 ↑	2.55 ▲	7.93 ↑
Mali	Millet	Kayes Centre, Retail, XOF/KG*	290	-3.33 ↘	-3.33 ↘	13.28 ↑	15.08 ×	-0.87 ↘	1.23 ▲
Mali	Millet	Niarela, Retail, XOF/KG*	215	-6.93 ↓	-4.44 ↘	13.16 ↑	19.44 ×	7.98 ↑	1.24 ▲
Niger	Millet	Abalak, Retail, XOF/KG*	247	3.78 ▲	-26.71 ↓	-15.41 ↓	9.29 ↑	9.07 ↑	17.43 ×
Niger	Millet	Bonkaney, Retail, XOF/KG*	230	-0.43 ↘	-24.84 ↓	-4.17 ↘	-1.71 ↘	3.18 ▲	6.05 ↑
Niger	Millet	Goure, Retail, XOF/KG*	195	-14.10 ↓	-40.73 ↓	-30.85 ↓	-16.31 ↓	14.21 ↑	26.44 ×
Niger	Millet	Katako, Retail, XOF/KG*	202	-13.68 ↓	-34.20 ↓	-21.40 ↓	-6.48 ↓	10.27 ↑	6.47 ↑
Nigeria	Millet	Ibadan, Wholesale, Naira/KG*	170	0.00 ●	-27.35 ↓	-10.64 ↓	51.79 ×		
Nigeria	Millet	Kano, Wholesale, Naira/KG*	153	9.78 ↑	-3.01 ↘	-6.54 ↓	70.79 ×		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG*	165	7.57 ↑	-1.18 ↘	15.62 ×	110.67 ×		
Nigeria	Millet	Lagos, Wholesale, Naira/KG*	202	-1.08 ↘	-10.23 ↓	10.27 ↑	63.40 ×		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG*	157	4.67 ▲	-7.65 ↓	7.35 ↑	79.43 ×		

Note: Last price is for January 2021, *December, **November, ***October and ****September

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

Like the last month, the outlook of sorghum prices for February 2021 shows a seasonal trend of declining prices in most of the selected markets except in few markets in Niger and Nigeria compared to the previous 1 and 3 months (Table 10). The improved seasonal yields contributed to improved food supplies, which significantly contributed to the observed decline in sorghum prices across the region. However, the forecast in the next 3 and 6 months indicate increases across most of the selected markets in Mali and Niger. As the season becomes lean, households deplete their supplies forcing prices up.

¹⁷ Author's construction based on data from WFP (2021) and FAO (2021)

Table 10: Changes in sorghum prices in selected West African countries¹⁸

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*	250	0.00 ●	9.65 ↑	11.11 ↑	25.00 ×	2.81 ▲	6.03 ↑
Mali	Sorghum	Badalabougou, Retail, XOF/KG*	195	-2.50 ▾	-4.88 ▾	-2.50 ▾	-11.36 ↓	1.44 ▲	7.91 ↑
Mali	Sorghum	Faladié, Retail, XOF/KG*	200	0.00 ●	0.00 ●	0.00 ●	8.11 ↑	6.80 ↑	8.31 ↑
Mali	Sorghum	Gao, Retail, XOF/KG*	250	0.00 ●	0.00 ●	0.00 ●	0.00 ●	30.68 ×	93.53 ×
Mali	Sorghum	Kayes Centre, Retail, XOF/KG*	235	-5.93 ↓	-5.93 ↓	-4.40 ▾	-6.68 ↓	-5.57 ↓	-100.00
Mali	Sorghum	Niarela, Retail, XOF/KG*	175	-6.91 ↓	-12.50 ↓	-5.41 ↓	-2.78 ▾	10.08 ↑	6.19 ↑
Niger	Sorghum	Abalak, Retail, XOF/KG*	286	4.38 ▲	-3.70 ▾	2.14 ▲	35.55 ×	11.79 ↑	15.47 ×
Niger	Sorghum	Bonkaney, Retail, XOF/KG*	251	5.46 ↑	-10.36 ↓	5.02 ↑	10.09 ↑	-2.98 ▾	-3.20 ▾
Niger	Sorghum	Goure, Retail, XOF/KG*	187	-1.06 ▾	-37.04 ↓	-22.73 ↓	3.89 ▲	14.16 ↑	21.76 ×
Niger	Sorghum	Katakou, Retail, XOF/KG*	182	-22.22 ↓	-35.46 ↓	-24.17 ↓	-8.08 ↓	2.69 ▲	-3.25 ▾
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG*	204	-21.54 ↓	-20.31 ↓	15.91 ×	85.45 ×		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG*	139	3.64 ▲	-27.70 ↓	-2.06 ▾	86.79 ×		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG*	163	6.85 ↑	-28.10 ↓	17.84 ×	100.64 ×		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG*	208	-6.82 ↓	-12.17 ↓	29.88 ×	79.76 ×		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG*	158	-40.00 ↓	-13.19 ↓	33.05 ×	100.63 ×		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	10	-95.24 ↓	-95.92 ↓	-95.87 ↓	-94.29 ↓		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	158	0.00 ●	17.04 ×	28.46 ×	2.60 ▲		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	240	-2.04 ▾	-9.43 ↓	-9.43 ↓	20.00 ×		
Togo	Sorghum	Kor bongou, Retail, CFA Franc BCEAO/KG	185	-1.60 ▾	42.31 ×	41.22 ×	42.31 ×		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	268	-10.07 ↓	-10.67 ↓	-4.29 ▾	18.06 ×		

Note: Last price is for January 2021, *December, **November, ***October and ****September

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

¹⁸ Author's construction based on data from WFP (2021) and FAO (2021)

Climatic Conditions and Potential Implications for Food and Nutrition Security

Like last month, the rainfall forecasts indicate that most countries in the Southern Africa region are expected to receive above-normal rainfall (Figure 8). Too much rainfall and flooding in some parts of the region increases the vulnerability of agriculture- and natural resource-based livelihoods. In some areas, the region's main season crops that are getting to maturity are at risk of too much rain. Reports of flooding in parts of the region indicate crop losses for the affected farmers that would negatively affect food availability. Also, excess rain would affect farmers' quality of produce, negatively impacting the nutritional value and potential farm incomes.

In East Africa, the region's central and southern parts are projected to receive above-normal rainfall. More rainfall without extreme flooding would create conducive conditions for cropping activities for the March-May cropping season. However, northern parts of the region (especially northern parts of Ethiopia) are projected to receive below-normal rainfall.

The West Africa region's rainfall forecast indicates the same projections as last month, showing above-normal rainfall around the coastal region. For the coastal areas, the above-normal rainfall creates favourable cropping conditions for the starting seasonal crops. The rest of the region show a forecast of below-normal rainfall.

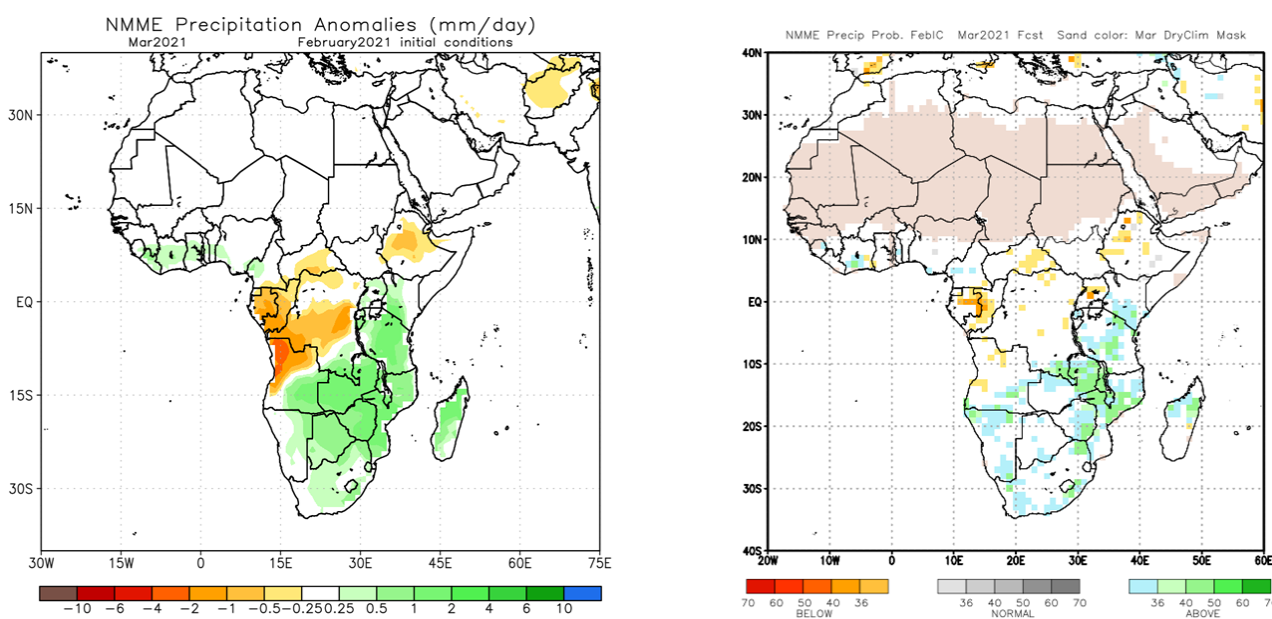


Figure 8: North American Multi-Model Ensemble (NMME) rainfall forecast for March 2021, based on February 2021 initial conditions¹⁹

¹⁹ 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

Desert Locust Outbreak and Impacts on Food Security and Trade

Similar to last month update, immature swarms persist in parts of the region, including Oromia, SNPP, and southern Rift Valley regions of Ethiopia (Figure 9). The immature swarms are declining in northern and central counties in Kenya, highlighting good progress in control operations. Other areas with reports of desert locust swarms include parts of Somalia and northeast Tanzania.

The latest update on desert locust shows that ongoing control operations have helped reduce the numbers and the risk of the new generation of swarms. The size of swarms and numbers have significantly reduced compared to the same time last year. Despite the progress, the recent desert locust impact assessment by the FSNWG published in January shows that the invasion caused significant negative impacts on the affected farmers' livelihoods by impacting cropping and livestock activities²⁰.

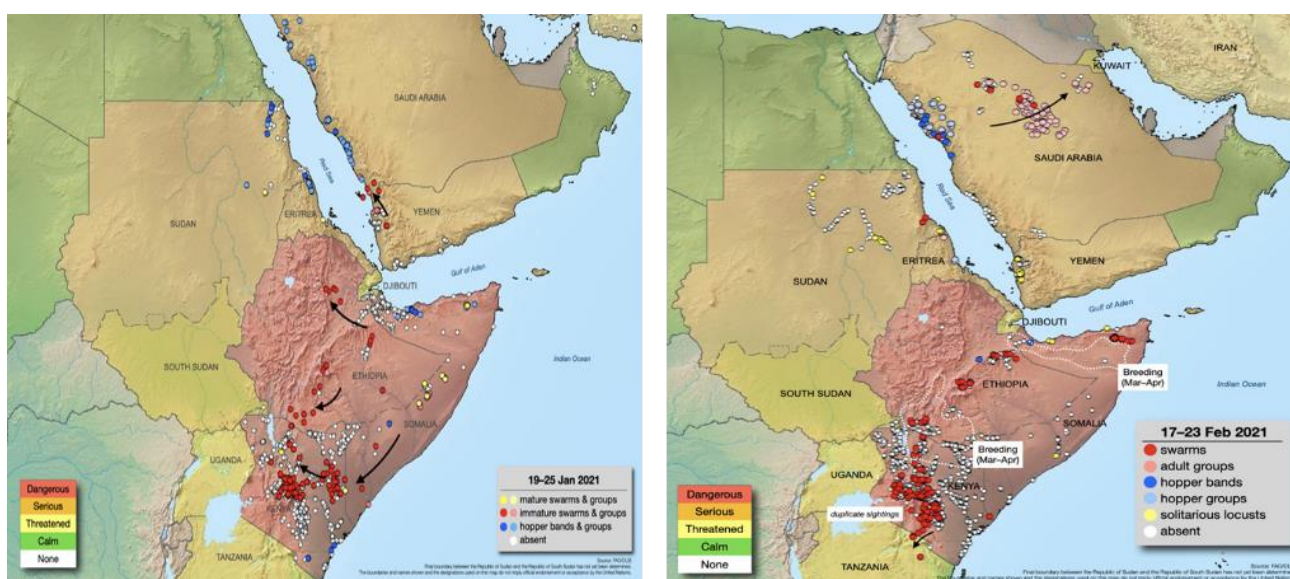


Figure 9: Situation, threat and forecast of desert locust in East Africa²¹

²⁰ https://mcusercontent.com/9206ea93bb8c6f35f98cc8ccf/files/48890d47-f658-450c-bbcc-235c1dfb5530/FSNWG_DLImpactAssessmentR2_FINALVERSION.pdf. Accessed 2 March 2021

²¹ <http://www.fao.org/ag/locusts/common/ecg/75/en/210126DLupdate.jpg>. Accessed 28 January 2021 and <http://www.fao.org/ag/locusts/common/ecg/75/en/210223DLupdate.jpg>. Accessed 2 March 2021



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