FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

EDITION #15

June 2021

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.

The Food Security Monitor is produced with support from the UK Government's Foreign, Commonwealth & Development Office (FCDO) through the Africa Food Trade & Resilience Programme.

Contents

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 June Food Security Monitor are summarized below.

Food Security Outlook. The number of Food Insecurity Hotspots - countries where more than 50% of the total population has insufficient food for consumption - increased from two to three in June 2021. These countries were South Sudan (60%), Burkina Faso (59%) and Mali (58%).

The East Africa region was predominantly in a crisis food security situation during the month, with the situation projected to persist until September.

The Southern Africa region continued to experience improved food security outcomes from the favourable harvests recorded across most parts of the region this year.

Meanwhile, food security outcomes varied across different countries in West Africa. The region experienced a predominately minimal food security situation, indicating a low level of food insecurity in the region. However, in Burkina Faso, conflicts in the Sahel and Eastern regions mean affected areas are in a food security crisis. In Mali, the impact of COVID-19 on the economy and the insecurity have led to lower incomes among vulnerable households leading to stressed food security situations in affected areas.

Food Trade. Efforts to improve intra-regional trade in East Africa continued in June, with East Africa Community member states coming together to explore the potential of a central bank digital currency (CBDC).

In Southern Africa, most countries experienced bumper harvests in the recent cropping season, leading some countries like Zimbabwe to institute import bans on maize. This was as others, like Malawi, explored alternative export markets in other parts of the continent.

In West Africa, the African Development Bank (AfDB) announced that the $430 million highway project linking Enugu in South-East Nigeria to Bamenda in Cameroon will be completed soon. The road is expected to transport 85 percent of the trade by volume in the Economic Community of West African States (ECOWAS) region.

Commodity Prices. In East Africa, prices over the last 1, 3, and 6 months have generally increased in Ethiopia and Kenya, except for the Nairobi market. Uganda has also seen a price surge over the last month in all selected markets, partly due to a rebound in formal trade after the lifting of Kenyan bans.

In the Southern Africa countries of Malawi and Mozambique, maize prices continued to exhibit a downward trend over the last 1-12 months. Forecasts show a downward price trend for the next 3 months in Mozambique and Zambia.

On the other hand, maize prices continue to soar in West African markets over the past 1-12 months. The limited food supplies, armed conflicts, currency depreciation, inflation, and COVID-related measures continue to account for the worsening prices.

Climatic conditions. The July rainfall projections for East Africa indicate wetter than usual conditions in parts of the region.

Meanwhile, the Southern Africa region is still off-season, and no rainfall is expected in most parts, while a majority of West Africa is projected to experience above-normal rainfall.

Desert Locust Outbreak. The June desert locust situation shows a decline in immature swarms in northwest Somalia due to control operations and migration. Increased sightings of swarms were reported in adjacent areas of Ethiopia and Djibouti.

AGRF Summit. Kenya will host the AGRF Summit 2021 from September 7 – 10, 2021. Around 500 people are expected to attend the summit in Nairobi, as another 10,000 participants are expected to join virtually from more than 150 countries.

Food Trade Coalition for Africa. The Food Trade Coalition for Africa convened its members on June 29 - 30, 2021, in Accra, Ghana, for its first General Assembly. The Coalition also held a Policy Dialogue on Policy Responses to Shocks that Significantly Impact the Food System and a private sector engagement on the Regional Food Balance Sheet.

Introduction

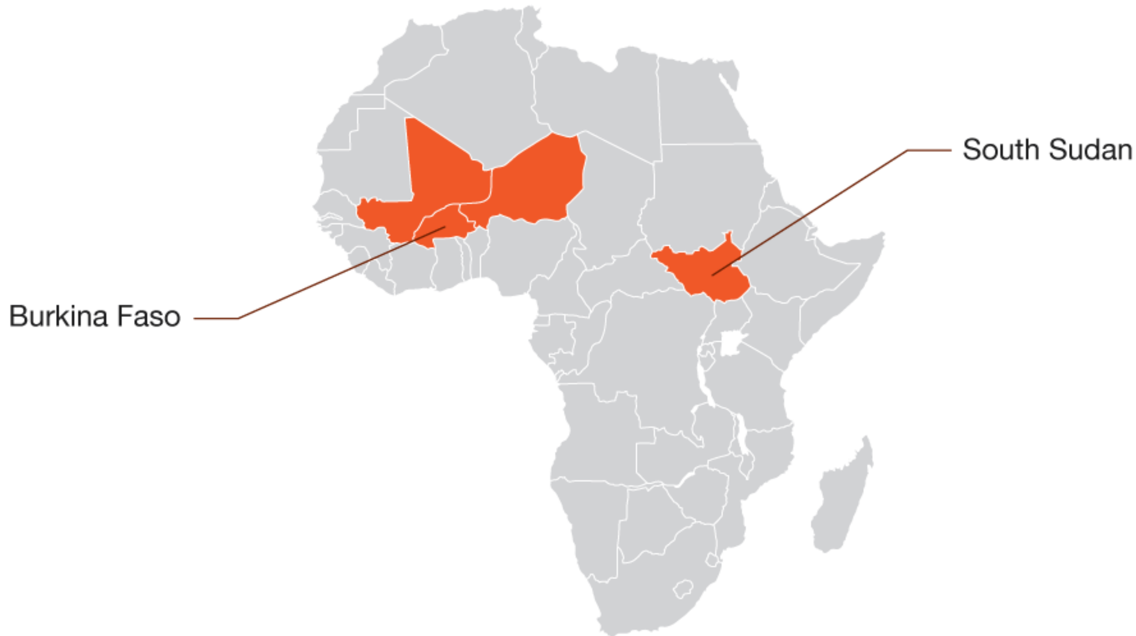
The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade, and food and nutrition security. The discussions presented focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, 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

Food Insecurity Hotspots

Food Insecurity Hotspots, defined as countries where more than 50% of the total population has insufficient food for consumption, increased from two to three in June 2021. These countries include South Sudan (60%), Burkina Faso (59%) and Mali (58%)[1].

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



Source: Own analysis based on data from WFP (2021)[2]

[1] https://hungermap.wfp.org/ Accessed 30 June 2021
[2] https://hungermap.wfp.org/ Accessed 30 June 2021

East Africa Outlook

The East Africa region experienced a predominantly IPC Phase 3 (Crisis) food security situation in June, with the situation projected to persist until September (Figure 2). The situation is driven by ongoing macroeconomic shocks linked to foreign exchange shortages, high fuel prices, economic contraction during the pandemic, and other factors pushing up food prices, reducing household income, and diminishing household purchasing power across most of the region. The food security situation did, however, vary across the different focus countries.

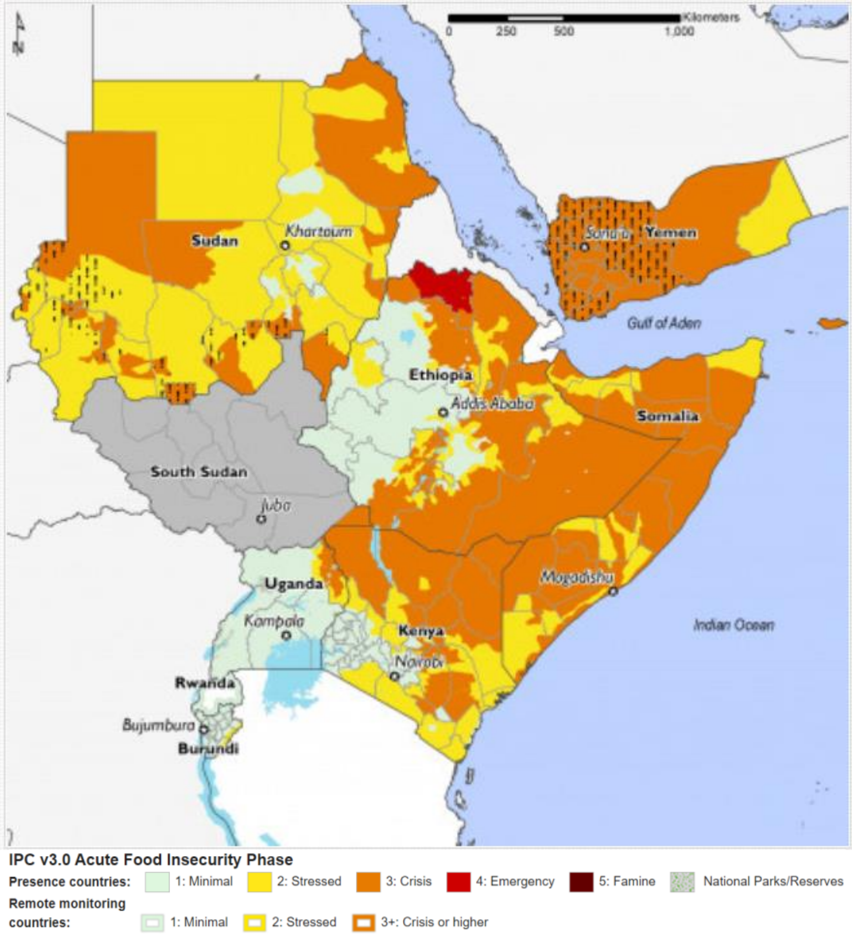


Figure 2: East Africa Current Acute Food Insecurity Classification, June-September 2021[1]

Ethiopia experienced IPC Phase 3 (Crisis) and Phase 4 (Emergency) in the Tigray region, where ongoing conflicts continued to disrupt access to food and income-generating activities, contributing to driving these extreme food insecurity situations. In addition, high government expenditure and the withdrawal of international support leading to a shortage of foreign currency have contributed to increased food prices and high levels of food insecurity[3].

Kenya experienced an IPC Phase 3 (Crisis) food security situation in June due to the cumulatively below-average incomes of most households. The below-average rainfall recorded between March and May is expected to result in below-average harvests, leading to a decline in the demand for agricultural-related casual labour activities, further worsening the food security situation in the near term[4].

In **Rwanda**, the ongoing harvest season for Irish potatoes and beans, together with increased food availability, improved access across the country's rural areas following the easing of COVID-19 movement restrictions. This has contributed to an improved food security situation in the country, with the country experiencing an IPC Phase 1 (minimal) food security outcome in June[5].

Uganda experienced an IPC Phase 2 (stressed) food security situation in June, mainly across the country's urban areas, with some areas experiencing IPC Phase 3 (crisis) despite the below-average food prices sustained by increased food availability from the bimodal harvests during the month. The

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[3] https://fews.net/east-africa/ethiopia Accessed on 30 June 2021
[4] https://fews.net/east-africa/kenya Accessed on 30 June 2021
[5] https://fews.net/east-africa/rwanda Accessed on 30 June 2021

food security situation has mainly been affected by the reinstatement of COVID-19 restrictions that disrupted income-generating activities following a surge in the number of cases.[6]

Prevalence of Insufficient Food Consumption in East Africa

The number of people with insufficient food for consumption across selected focus countries in East Africa was 53 million in June 2021. This is a 4.7 percent increase from May 2021, indicating that the food security situation deteriorated across the region (***Table 1***). All the countries, except South Sudan, recorded an increase in the number of people with insufficient food for consumption during the month.

Table 1: Prevalence of insufficient food consumption across selected East African countries (June 2021)[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 (%)
Ethiopia	109.20	15.60	16.40	15.02%	5.13%	↑	7.20%	36.80%
Kenya	51.40	5.80	7.00	13.62%	20.69%	↑	4.20%	26.20%
Rwanda	12.30	2.50	2.60	21.14%	4.00%	↑	2.30%	38.30%
South Sudan	11.00	6.80	6.60	60.00%	-2.94%	↓	22.70%	31.30%
Tanzania	56.30	5.30	5.50	9.77%	3.77%	↑	3.50%	31.80%
Uganda	42.70	14.60	14.90	34.89%	2.05%	↑	3.50%	28.90%

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

Southern Africa Outlook

The Southern Africa region continued to experience improved food security outcomes from the favourable harvests recorded across most parts of the region this year. Most parts of the region experienced IPC Phase 1 (minimal) and IPC Phase 2 (stressed) situations during the month.

Malawi experienced an IPC Phase 1 (minimal) food security situation as food availability from the country's bumper harvests continued to drive low commodity prices across the country[8].

In **Mozambique**, food availability from the harvests contributed to the IPC Phase 1 and IPC Phase 2 situations recorded across most parts of the country. The conflict situation in Cabo del Gado in the north of the country continued to disrupt livelihoods and food access, contributing to IPC Phase 3 security situations[9].

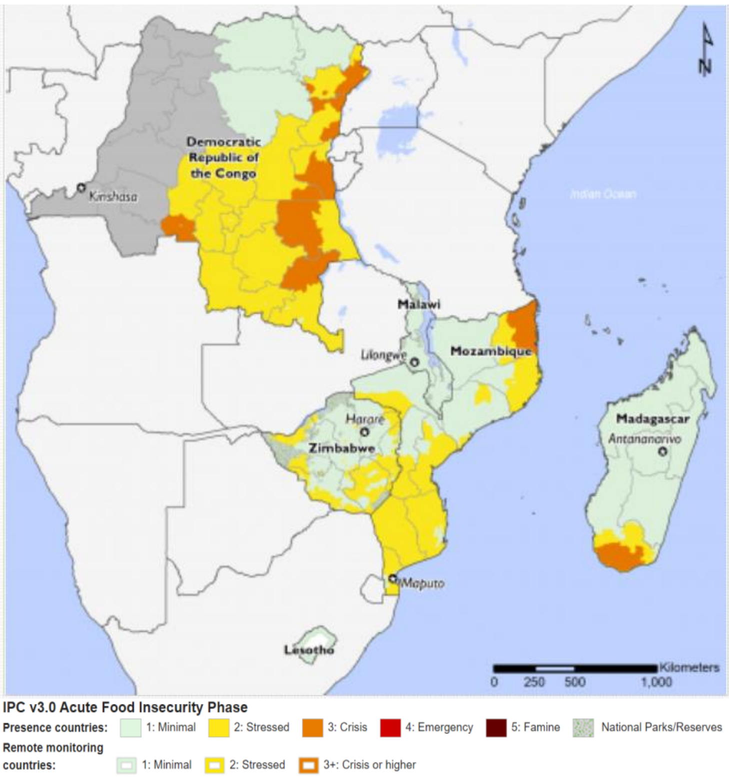

Figure 3: Southern Africa countries Food Security Outlook, June-September 2021

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[6] https://fews.net/east-africa/uganda Accessed on 30 June 2021
[7] https://hungermap.wfp.org/ Accessed on 30 June 2021.
[8] https://fews.net/southern-africa/malawi Accessed on 30 June 2021
[9] https://fews.net/southern-africa/mozambique Accessed on 30 June 2021

Zimbabwe experienced IPC Phase 1 and IPC Phase 2 during June as the country enjoyed the above-average harvests this year. The reinstatement of COVID-19 measures during the month following a recent surge in cases has impacted some of the income-generating activities for urban households leading to stressed food outcomes. The continued closure of land borders to the general public affected informal cross-border trade activities and the remittance of food from neighbouring countries and income for most households. Food prices have been increasing as the local currency (ZWL) has weakened in recent months against the USD[10].

Prevalence of Insufficient Food Consumption in Southern Africa

The number of people with insufficient food for consumption across selected focus countries in Southern Africa was 19.8 million in June 2021. This was a 7.6 per cent increase from May, indicating that the region's food security situation deteriorated over the past month. Zimbabwe and Mozambique recorded an increase in the number of people with insufficient food for consumption, while in Malawi and Zambia, the number remained stable.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (June 2021)[11]

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	2.90	2.90	16.02%	0.00%	●	1.30%	39.00%
Mozambique	29.50	8.30	9.50	32.20%	14.46%	↑	4.40%	42.30%
Zambia	17.40	2.80	2.80	16.09%	0.00%	●	4.20%	34.60%
Zimbabwe	14.40	4.40	4.60	31.94%	4.55%	↑	2.90%	23.50%

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

West Africa Outlook

Food security outcomes varied across different countries in West Africa in June, with the region experiencing a predominately minimal (IPC Phase 1) food security situation (Figure 4). **Burkina Faso** experienced an IPC Phase 1 food security situation across most parts of the country. Conflicts in the Sahel and Eastern regions of the country have disrupted agricultural activities that have seen these areas experience an IPC Phase 3 situation. Food security situations are projected to improve from October as the harvesting season kicks in, leading to improved food availability[12].

In **Mali**, the impact of COVID-19 on the economy and the insecurity situation has resulted in a drop in household incomes among vulnerable households leading to stressed food security situations in affected

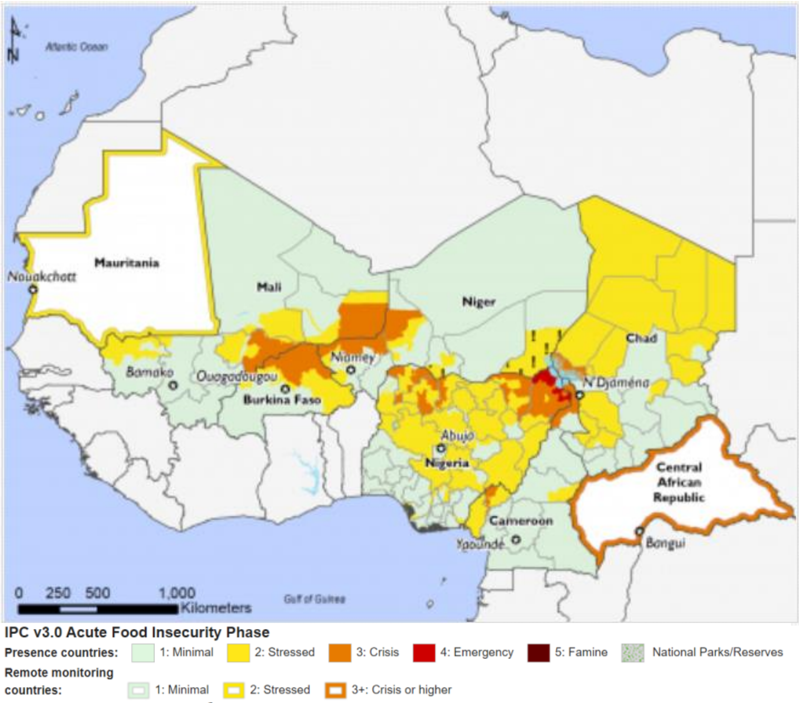


Figure 4: West Africa countries Food Security Outlook, May 2021

[10] https://fews.net/southern-africa/zimbabwe Accessed on 30 June 2021
[11] https://hungermap.wfp.org/ Accessed on 30 June 2021.
[12] https://fews.net/west-africa/burkina-faso Accessed on 30 June 2021

areas. The beginning of the country's agricultural season with forecasts of above-average rainfalls is projected to lead to above-average harvests, improving food security outcomes[13].

Nigeria continued to experience stressed IPC Phase 2 food security situations sustained by widespread conflicts and poor economic performance, resulting in decreased household incomes and high food prices.

Prevalence of Insufficient Food Consumption in West Africa

The number of people with insufficient food for consumption across the focus countries in West Africa was 99.0 million in June 2021. This was a 5.4 per cent increase from the previous month, suggesting that the region's food security situation deteriorated over the past month. All focus countries recorded an increase in the number of people with insufficient food for consumption during the month, except Ghana, which experienced a decrease, and Cote d'Ivoire, where the situation remained stable (***Table 3***).

Table 3: Prevalence of insufficient food consumption in selected West African countries, June 2021[14]

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	11.60	11.70	59.09%	0.86%	↑	8.40%	24.90%
Cote d'Ivoire	25.10	3.80	3.80	15.14%	0.00%	●	6.10%	21.60%
Ghana	29.80	5.90	5.70	19.13%	-3.39%	↓	6.80%	17.50%
Mali	19.10	9.20	11.00	57.59%	19.57%	↑	9.00%	26.90%
Niger	22.40	9.40	10.60	47.32%	12.77%	↑	14.10%	48.50%
Nigeria	202.80	51.70	53.80	26.53%	4.06%	↑	6.80%	36.80%
Togo	7.90	2.30	2.40	30.38%	4.35%	↑	5.70%	23.80%

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

[13] https://fews.net/west-africa/mali Accessed on 30 June 2021
[14] https://hungermap.wfp.org/ Accessed on 30 June 2021

Food Trade Updates

East Africa

Efforts to improve intra-regional trade in East Africa have continued over the past month. The East Africa Community member states are coming together to explore the potential of a central bank digital currency (CBDC) for their shared payment system, which will improve cross-border trade payments across the region. This will see the EAC upgrade the struggling East African Payment System (EAPS), launched in May 2014[15].

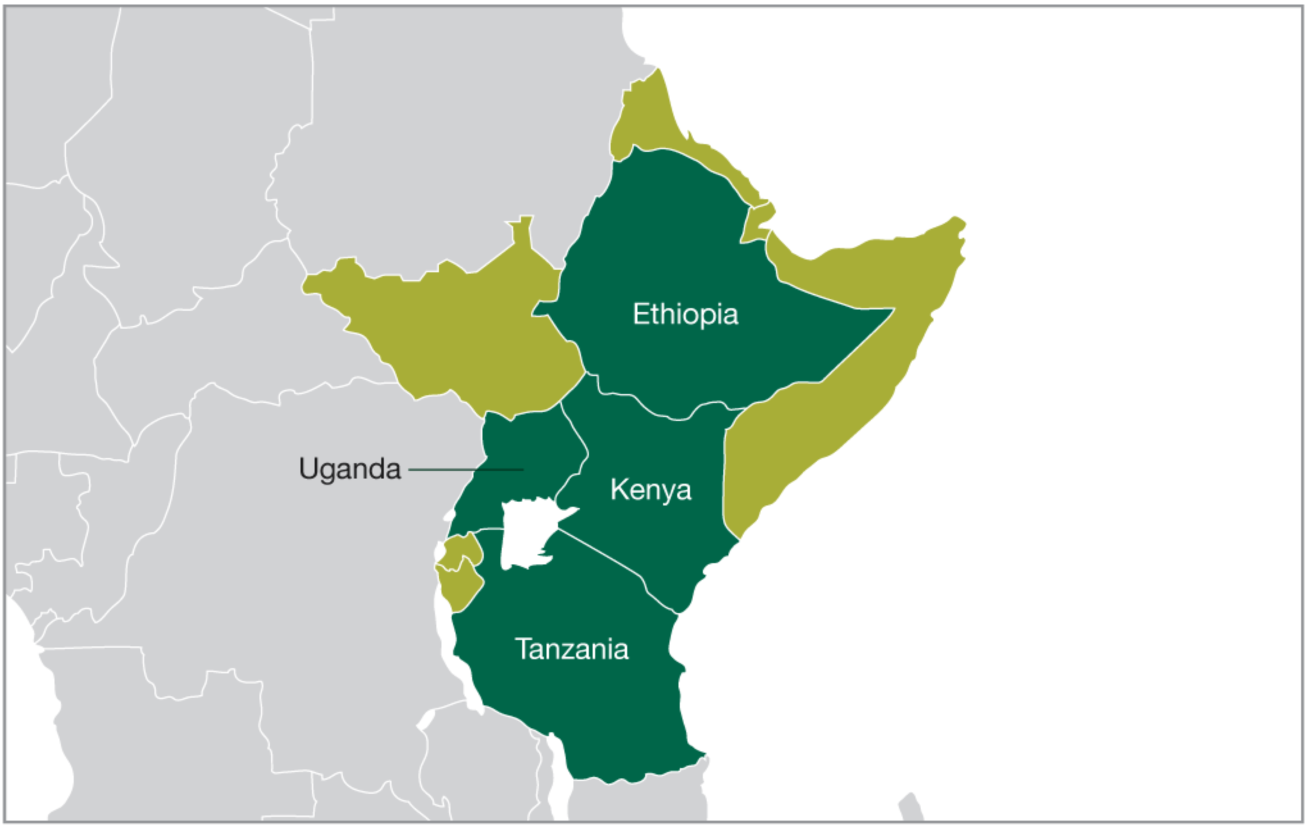
The Eastern and Southern African Trade & Development Bank (TDB) and TradeMark East Africa (TMEA) signed an MoU that establishes a framework for collaboration that will boost regional trade in another move that will promote regional integration and trade across East Africa. Under the MoU, the two institutions will work together to carry out various analytical and advisory services to digitize trade investment processes and information technology innovations in trade, logistics and transportation. The MoU further facilitates innovation and capacity development for regional businesses, thus enabling them to effectively engage in global and regional trade transactions with high development impact.[16]

The Moyale One-Stop Border Post (OSBP) on the Kenya-Ethiopia border commenced operations during the month and is expected to bolster trade between the two countries. Despite these positive developments, COVID-19, trade blockades and civil unrest continue to disrupt trade activities in some parts of the region. Uganda reports that trade activities to Kenya, DR Congo, and South Sudan have been affected in recent months[17].

Figure 5: provides an update of the various events and activities recorded across different countries in East Africa over the past month impacting food trade in the region.[18]

[15] https://www.theeastafrican.co.ke/tea/business/eac-explores-potential-of-common-digital-cash-3422726 Accessed on 29 June 2021
[16] https://southerntimesafrica.com/new-deal-pushes-regional-trade/ Accessed 29 June 2021
[17] https://www.monitor.co.ug/uganda/business/finance/export-earnings-to-kenya-south-sudan-drop-3432428 Accessed on 29 June 2021
[18] https://www.theeastafrican.co.ke/tea/news/east-africa/kenya-burundi-trade-ties-3421364 Accessed on 29 June 2021
https://nation.africa/kenya/business/-kenya-drops-inspection-fees-for-tanzania-food-products-3420934 Accessed 29 on June 2021
https://www.businessdailyafrica.com/bd/economy/burundi-kenya-business-lobbies-sign-deal-trade-and-investments-3423796 Accessed on 29 June 2021
https://www.businessdailyafrica.com/bd/markets/commodities/potato-imports-by-fast-food-firms-to-attract-30pc-duty-3439420 Accessed 29 on June 2021
https://www.thecitizen.co.tz/tanzania/news/mwanza-should-be-trade-hub-samia-3437986 Accessed on 29 June 2021
https://nairobinews.nation.co.ke/news/barter-trade-somalia-ethiopia-to-exchange-fish-for-miraa Accessed on 29 June 2021
https://www.independent.co.ug/covid-19-affecting-uganda-drc-trade/ Accessed on 29 June 2021
https://www.independent.co.ug/regional-trade-promotion/ Accessed on 29 June 2021

Figure 5: East Africa Cross border trade updates June 2021



TANZANIA

- President Samia Suluhu Hassan outlined her government's major plans to make Mwanza a trade hub within the Great Lake Regions.
- The move will come after completing critical infrastructure developments, including the Standard Gauge Railway (SGR), construction of an airport terminal in the city, and strengthened marine transport in Lake Victoria.

KENYA

- Kenya signed several trade deals with Burundi aimed at deepening trade and development.
- Kenya has scrapped inspection fees for Tanzanian importers of processed foods approved by the Kenya Bureau of Standards.
- Fast food franchises operating in Kenya have been slapped with a 30 percent duty on imports of the potatoes used to make french fries.

ETHIOPIA

- Somalia has agreed on a barter trade deal with Ethiopia that enables Somalis to export fish to their neighbours in exchange for Khat (miraa).
- To kick start the process, Somalia has already transported to Ethiopia a consignment of 5,000 tonnes of fish.

UGANDA

- Uganda and the Democratic Republic of Congo (DRC) launched the construction of a 223km road network designed to boost bilateral trade and improve security for oil companies operating in the Lake Albert basin.
- The Uganda Manufacturers Association has cited the need for an export guarantee scheme for trade with the Democratic Republic of Congo and South Sudan.

Southern Africa

Most countries in Southern Africa experienced bumper harvests in the recent cropping season, with traditionally import-dependent countries such as Zimbabwe instituting import bans on maize. On the other hand, countries such as Malawi have been looking for alternative export markets in other parts of the continent, namely in South Sudan. The signing of a trade agreement between Malawi and South Sudan will see Malawi export its surplus cereal to South Sudan, estimated at around 1.2 million tonnes, and other commodities such maize flour, sugar, rice, groundnuts and beans. In return, South Sudan will export refined petroleum to Malawi, which will save Malawi on the import costs of refined petroleum from the Middle East.

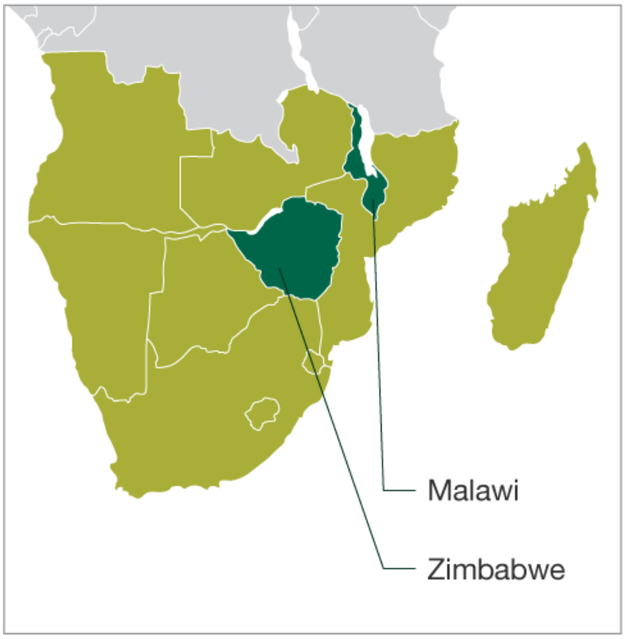
The Economic Commission for Africa (ECA), Sub-Regional Office for Southern Africa held a meeting to validate the study *Assessing the Feasibility of Establishing and Managing a Common Agro-Industrial Park between Zambia and Zimbabwe*. This initiative is expected to accelerate development and cooperation across the region.

Despite the existing ban on maize and maize flour imports in Zimbabwe, millers in the country have reported an increase in the influx of cheap maize flour imports, mainly from South Africa, resulting in most millers suspending their operations. Millers further reported that they could not buy maize for processing from the Grain Marketing Board as locally processed maize meal has not been selling well in retail shops due to these cheap imports[19].

Malawi announced plans to roll out tax measures aimed at facilitating regional integration, trade and economic growth. Among these plans is a duty-free week for imports not exceeding USD3,000, which is higher than the COMESA Simplified Trade Regime threshold of USD 2,000. This duty-free status is expected to go a long way in promoting cross-border trade activities[20].

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 June 2021[21]



ZIMBABWE

- ZimTrade hosted a market intelligence information dissemination seminar focusing on the Rwanda market to prepare and equip local producers with knowledge regarding the vast export opportunities in Rwanda.

MALAWI

- Malawi's Trade Ministry, in collaboration with the African Trade Policy Centre (ATPC), a unit of the Economic Commission for Africa (ECA), commenced the review and validation of the country's African Continental Free Trade Area (AfCFTA) implementation strategy.
- Malawi has signed the Charter establishing the SADC Regional Fisheries Monitoring Control and Surveillance Coordination Centre (MCSCC). The country has also launched the SADC-aligned National Aquaculture Strategy, and a report on *"Working Together to Protect our Fisheries".*

[20] https://southerntimesafrica.com/malawi-tax-measures-to-spur-trade/ Accessed on 29 June 2021
[21] https://www.chronicle.co.zw/zimbabwe-targets-to-hike-exports-to-rwanda/ Accessed on 29 Jun 2021
https://www.sadc.int/news-events/news/malawi-embraces-regional-cooperation-support-sustainable-fisheries-and-aquaculture-development-sadc/ Accessed on 29 June 2021
https://www.uneca.org/stories/ministry-of-trade-and-atpc-open-workshops-to-review-and-validate-its-afcfta-national Accessed on 29 June 2021

West Africa

The African Development Bank (AfDB) announced that the $430 million highway project linking Enugu in South-East Nigeria to Bamenda in Cameroon will be completed soon. Upon completion, this development is expected to bolster the integration of Nigerian businesses with its African peers and support the African Continental Free Trade Area (AfCFTA) by linking 85 percent of the trade volume in ECOWAS through the corridor[22]. In another development promoting regional integration and trade, Nigeria signed bilateral trade agreements with Burundi on trade, investment, education, technology and tourism.

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 June 2021[23]

TOGO

- The Togolese minister of trade, industry, and local consumption called all business owners and lab heads to ensure that their products meet accredited standards.

NIGERIA

- The West Africa Trade & Investment Hub (Trade Hub) has awarded a $1.4 million (N574 million) co-investment grant to OCP Africa Fertilizers Nigeria Limited (OCP Africa).
- The Lagos Chamber of Commerce and Industries (LCCI) has disclosed that the lack of an inter-agency regulatory framework is affecting the implementation of international trade in Nigeria.

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[22] https://www.icirnigeria.org/hope-for-nigerias-trade-integration-as-430m-enugu-cameroon-road-ready-soon/ Accessed on 29 June 2021
[23] https://www.togofirst.com/en/economic-governance/1006-8003-minister-of-trade-urges-businesses-to-get-their-products-accredited Accessed on 29 June 2021
https://www.premiumtimesng.com/business/business-news/468374-trade-hub-awards-1-4-million-co-investment-grant-to-boost-fertilizer-production-in-nigeria.html Accessed on 29 June 2021
[23] https://nairametrics.com/2021/06/17/lack-of-regulatory-framework-a-roadblock-to-international-trade-lcci/ Accessed on 29 June 2021

Agricultural Commodities Price Monitoring

East Africa

From the May report, maize price trends in the East African region have not changed significantly. Prices in the selected markets continue to decline compared to their previous levels in 1, 3, 6 and 12 months. However, prices over the last 1, 3, and 6 months have generally increased in Ethiopia and Kenya, except for the Nairobi market. Also, in South Sudan, current maize prices were higher than their previous levels 3 and 12 months ago. The situation in Ethiopia and South Sudan is mainly driven by conflicts and insecurity coupled with erratic rains at the start of the season.[24] Uganda has also seen a price surge over the last month in all selected markets. A rebound in formal trade after the lifting of Kenyan bans is driving up retail prices in Uganda.[25] Estimates show that maize prices will continue to decline in Tanzania over the next 3-6 months, whereas in Rwanda, prices are expected to rise, exceeding 15% in most cases.

Table 4: Changes in maize prices in selected East African Countries[26]

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	3.71	10.02	0.41	26.28		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG***	14	5.43	0.00	2.56	26.87		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG**	27	8.81	11.70	14.07	-16.64		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	33	-1.40	-7.77	-1.90	0.32		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	30	4.01	10.10	18.37	-19.39		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG	187	-6.28	-37.34	-49.09	-25.33	21.60	31.79
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	250	0.00	-34.78	-37.82	-23.08	18.22	26.00
Rwanda	Maize (white)	Mugera, Retail, RWF/KG**	192	-0.86	-41.92	-36.11	-14.18	23.16	47.87
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG**	195	1.96	-37.76	-34.86	-23.36	29.05	40.67
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	186	-13.68	-10.34	-16.77	14.64		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	359	-13.38	-13.32	-12.72	57.59		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	343	-15.31	20.00	-20.00	61.07		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	229	0.00	4.85	14.29	45.45		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	311	8.60	8.60	-11.92	78.62		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG****	43,438	-6.25	-19.19	-15.65	-28.67	-19.09	-30.17
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG**	36,857	-25.21	-36.54	-40.60	-33.29	-28.01	-28.25
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG**	40,975	-13.08	-25.20	-31.28	-21.20	-8.14	-0.50
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG**	47,328	-3.90	-23.04	-15.85	-21.77	-21.54	-12.61
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG**	55,000	-7.82	-16.03	-9.84	-5.38	0.37	-7.77
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	570	5.38	-25.22	-17.51	-54.81		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	643	15.55	-13.01	-10.14	-44.30		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	563	15.18	-16.11	-15.15	-48.45		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	553	8.55	-14.23	-17.22	-50.77		

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

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

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[24] FEWSNET. Accessed on 22nd June 2021 at: https://fews.net/east-africa
[25] FEWSNET. Accessed on 22nd June 2021 at: https://fews.net/east-africa/uganda
[26] Author's construction based on data from WFP (2021) and FAO (2021)

Beans prices in all selected markets in Rwanda have been declining over the past 1-12 months, although prices are expected to pick up in the next 3-6 months. In Tanzania and Uganda, there is a mixed picture of price changes. Whereas some markets experienced low to moderate price decreases, others have seen increases in the last 1, 3, and 6 months. In general, beans prices were lower than their levels 12 months ago. During the 2020/21 seasons, favourable harvests and reduced markets sales due to COVID-19 restrictions continue to account for these trends.[27]

Table 5: Changes in bean prices in selected East African Countries[28]

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	350	-9.87 ⇩	-19.85 ↓	-46.70 ↓	-22.22 ↓	-13.05 ⇩	-31.97 ↓
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	483	-3.33 ↘	-4.61 ↘	-35.20 ↓	-14.07 ⇩	3.13 ▲	2.26 ▲
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG**	425	-18.73 ↓	-13.27 ⇩	-51.58 ↓	-15.00 ↓	11.87 ↑	35.00 ⊗
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG**	445	-21.14 ↓	-7.16 ⇩	-46.03 ↓	-33.21 ↓	-0.55 ↘	11.38 ↑
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG**	146,563	-7.76 ⇩	-16.73 ↓	-10.36 ⇩	-8.68 ⇩	1.29 ▲	-1.56 ↘
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG**	220,417	9.90 ↑	5.34 ↑	1.39 ▲	9.12 ↑	8.61 ↑	16.74 ⊗
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG**	154,688	2.10 ▲	-0.91 ↘	-24.54 ↓	-27.80 ↓	-7.57 ⇩	4.17 ▲
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG**	192,500	-5.52 ⇩	-9.77 ⇩	6.21 ↑	-1.28 ↘	-7.88 ⇩	-4.09 ↘
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG**	197,500	-1.52 ↘	-3.66 ↘	-8.28 ⇩	-1.25 ↘	-7.55 ⇩	-9.86 ⇩
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG**	2,620	2.23 ▲	3.89 ▲	7.06 ↑	-24.36 ↓		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG	2,349	-1.18 ↘	6.74 ↑	10.85 ↑	-15.63 ↓		

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

● *= 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 have been rising in Addis Ababa, Kabuga, and Rumbek over the last 1-12 months, while Mugera, Nyabiheke, Aweil, Juba, and Wau have had lower sorghum prices than their previous levels in the last 1-3 months (Table 6). South Sudan is generally experiencing higher sorghum prices now - exceeding 15% - than 12 months ago. Again, conflicts that have displaced and disrupted agriculture activities account for these price surges.

Table 6: Changes in sorghum prices in selected East African Countries[29]

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***	16	1.39 ▲	17.23 ⊗	15.13 ⊗	56.68 ⊗		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG***	23	0.83 ▲	2.75 ▲	-6.58 ⇩	33.37 ⊗		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG**	475	7.55 ↑	5.56 ↑	-0.35 ↘	14.23 ↑	-17.87 ↓	3.40 ▲
Rwanda	Sorghum	Mugera, Retail, RWF/KG**	350	-12.50 ⇩	-27.08 ↓	25.00 ⊗	-10.26 ⇩	7.01 ↑	-3.63 ↘
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG**	340	-2.86 ↘	-29.17 ↓		-18.07 ↓	2.19 ▲	-3.99 ↘
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	227	-9.28 ⇩	-6.49 ⇩	7.46 ↑	36.79 ⊗		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	376	-8.74 ⇩	-8.30 ⇩	-10.42 ⇩	71.45 ⊗		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG**	386	22.73 ⊗	33.27 ⊗	20.00 ⊗	129.59 ⊗		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	331	-3.58 ↘	-3.58 ↘	-11.61 ⇩	88.13 ⊗		

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

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

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[27] FEWSNET. Accessed on 25th May 2021 at: fews.net/east-africa/rwanda
[28] Author's construction based on data from WFP (2021) and FAO (2021).
[29] Author's construction based on data from WFP (2021) and FAO (2021).

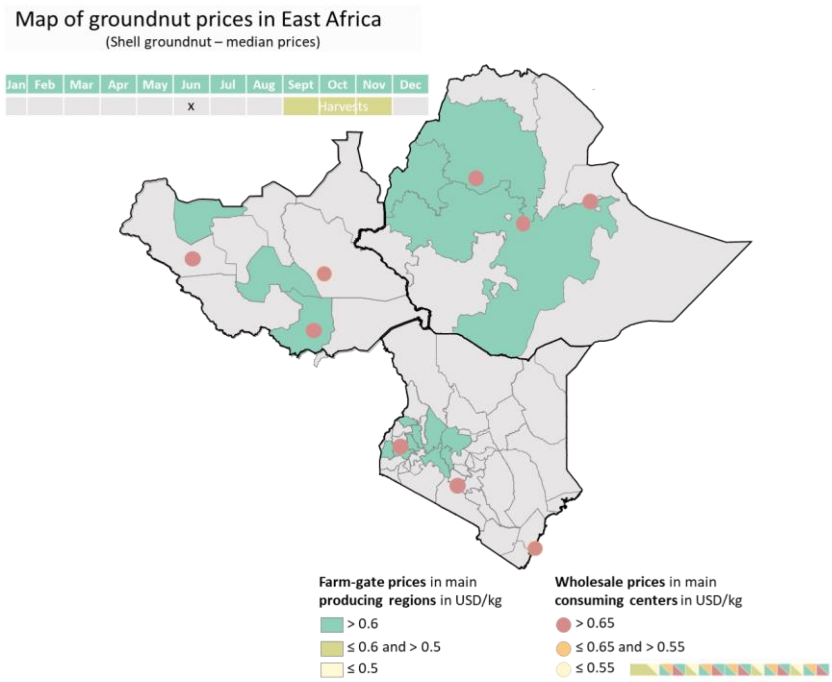

Figure 8: Map of East Africa groundnut price distribution for June 2021

Ethiopia: Compared to teff and maize, groundnut has low demand at producer and consumer levels, and production areas have not significantly increased over the past years. In June, the price increased by less than 2% because of the balanced ratio between demand and supply. Similarly, the stock volume has not significantly changed since there were no significant challenges like shortage of rainfall, unavailability of seed and fertilizer, and logistics challenges.

Kenya: In all groundnut producing regions, including Nyanza, Western, and Eastern regions, the prices have increased due to the reduced supply in the market. Although we are nearing the harvest season in the Nyanza and Western regions, many farmers expect poor harvests due to the heavy rains that ruined most crops. Furthermore, fewer farmers planted groundnuts this year as compared to previous years. In Nyanza, there was a 24.2% increase in farmgate prices from $1.31 per kg in May 2021 to $1.62 per kg in June 2021. Wholesale prices also increased significantly from $1.40 per kg to $1.91 per kg. In Western Region, there was also a slight increase in the farmgate prices from $1.40 per kg in May 2021 to $1.62 per kg in June 2021, representing a 15.9% increase. Over the same period, wholesale prices rose from $1.45 per kg to $1.81 per kg. In the Eastern Region, farmgate prices increased from $1.12 per kg in May to $1.15 per kg in June 2021, while the wholesale price traded at $1.19 per kg in June 2021, up from $1.17 per kg in May 2021. In the consumption regions - Siaya and Nairobi - there was an increase in groundnut prices due to the limited supply and declining stocks, with Siaya reporting a significant increase in wholesale prices from $1.31 per kg in May 2021 to $1.85 per kg in June 2021, representing a 42% increase. The retail price also increased from $1.45 per kg in May 2021 to $2.04 per kg in June 2021. In Nairobi, the wholesale price increased from $1.54 per kg in May 2021 to $1.39 per kg in June 2021. The retail prices also increased from $1.59 per kg to $1.76 per kg over the same period.

Southern Africa

In Malawi and Mozambique, maize prices continue to exhibit a downward trend in most cases over the last 1-12 months (Table 7). However, prices in Pemba have risen over the last 1-12 months, whereas prices in Maputo have risen over the last 3-12 months. Prices in Lilongwe, Mzimba, and Mzuzu have also risen over the last six-month level. In Zambia, maize prices have risen over their last 3 and 6 month levels, exceeding 24% in most cases, although prices have decreased, remained the same or slightly increased over the 1 and 12 months levels. For the next 3-6 months, forecasts show a downward price trend for the next 3 months in Mozambique and Zambia, except in Chibombo and Mpika. The main driver of lower prices in Malawi is favourable harvests. Although the recent harvests have improved access, conflicts in parts of the country and COVID-19 restrictions still impact food inflation in Mozambique.

Table 7: Changes in maize prices in selected Southern African Countries[30]

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****	180	-7.69	-10.00	20.00	-51.35		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG**	156	-5.17	-16.49	4.00	-1.89		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG**	170	-5.56	-5.56	13.33	-19.14		
Malawi	Maize (white)	National Average, Retail, MWK/KG**	176	-3.31	-14.56	-9.44	-0.99		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG**	173	-1.98	-25.56	-18.47	13.07		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG***	15	-6.20	-11.67	-2.76	-41.11	-2.64	-7.93
Mozambique	Maize (white)	Maputo, Retail, MZN/KG***	30	-3.33	6.02	15.21	6.02	-11.06	-12.55
Mozambique	Maize (white)	Massinga, Retail, MZN/KG***	23	-13.29	-15.53	-0.17	-40.26	-22.37	-8.27
Mozambique	Maize (white)	Pemba, Retail, MZN/KG***	35	12.98	14.81	30.55	12.73	-27.07	-27.86
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG*****	4	0.00	26.73	90.09	-4.95	10.90	-14.93
Zambia	Maize (white)	Chipata, Retail, ZMW/KG*****	4	0.00	27.12	36.49	-2.75	-3.86	-19.79
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG*****	4	13.74	31.86	31.86	-12.39	-10.54	-32.65
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG*****	5	12.10	26.11	36.34	16.71	-4.19	-8.37
Zambia	Maize (white)	Mpika, Retail, ZMW/KG*****	3	0.00	24.72	24.72	-45.50	19.22	-21.32

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

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

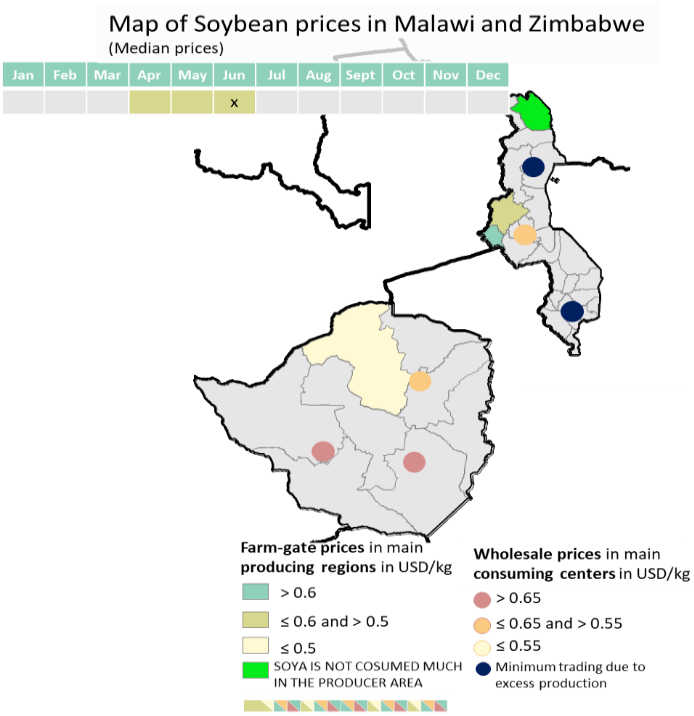

Figure 9: Map of South Africa soya price distribution for June 2021

[30] Author's construction based on data from WFP (2021) and FAO (2021).

Malawi: Most farmers have finished selling their soybean harvest, and small traders are scrounging production areas for remnants of the crop. The bubble of high farmgate prices due to an influx of traders exporting to India has disappeared. Demand is still strong for local processors, who want a longer season of oil and soya chunks/pieces' production paying up to ($ 664 PMT) as monitored by ACE. Farmgate prices range from ($ 501 – 595 PMT).

Zimbabwe: Within production and consumption areas, respectively, farmgate and wholesale prices of soybean have decreased from last month due to increased supply. The current prices are way above the government minimum price of US$0.13/kg. They, therefore, continue to attract sellers and buyers in the open market despite the government's directive that all surplus soybean must be sold to the Grain Marketing Board (GMB). Meanwhile, 9,858 tons of soybean have been delivered to the GMB compared to 956 tons for the same period last year.

West Africa

Maize prices continued to soar in markets in the West Africa region over the past 1-12 months in almost all focus countries. The few exceptions continue to be Korhogo and Gao and, to some extent, Bolga (Table 8). In Togo, maize price increases have exceeded 50% in most cases over the past 1-12 months. Limited supplies, armed conflicts, currency depreciation, inflation, and COVID-related measures continue to account for the worsening food prices in the region.[31] The price outlook for the next 3-6 months remains as in May. Korhogo, Man, Accra, Badalabougou, and Faladie markets, are projected to have maize price decreases, whereas Bolga, Kumasi, Techniman, Ansongo, Gao, Kayes Centre, and Niarela are expected to see price increases.

Table 8: Changes in maize prices in selected West African countries[32]

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**	238	8.57	-5.00	-1.73	-0.21	-10.30	-14.28
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG	275	22.22	37.50	37.50	41.75	-5.08	-3.52
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG**	264	15.48	13.33	48.75	52.56	-4.62	-4.84
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG**	149	0.00	-13.16	3.94	46.70	9.71	18.14
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG**	297	4.49	2.70	63.41	40.74	38.62	23.46
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG**	185	9.47	20.13	71.79	71.53	32.68	-20.46
Mali	Maize (white)	Ansongo, Retail, XOF/KG***	203	1.50	-7.73	1.50	0.02	2.41	3.55
Mali	Maize (white)	Badalabougou, Retail, XOF/KG***	215	7.50	30.30	16.22	0.23	-4.23	-1.12
Mali	Maize (white)	Faladié, Retail, XOF/KG***	200	14.29	14.29	14.29	0.33	-4.86	-0.04
Mali	Maize (white)	Gao, Retail, XOF/KG***	225	0.00	0.00	0.00	0.00	4.17	1.46
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG***	250	0.00	25.00	6.38	0.25	1.78	11.82
Mali	Maize (white)	Niarela, Retail, XOF/KG***	195	11.43	11.43	11.43	0.18	1.68	3.99
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG****	220	0.00	12.10	41.03	76.00		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG****	204	0.51	12.43	52.12	84.99		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG****	183	-1.67	5.30	25.97	66.91		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG****	213	1.04	16.23	27.54	59.55		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG****	193	1.85	8.45	22.22	71.11		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	230	15.00	53.33	76.92	64.29		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	250	42.86	62.34	85.19	100.00		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG**	250	31.58	77.30	78.57	85.19		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	265	14.72	41.71	76.67	62.58		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	230	19.79	47.44	64.29	70.37		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	270	16.88	40.63	42.11	58.82		

[31] FEWSNET. Accessed on 23rd June 2021 at: fews.net/west-africa

[32] Author's construction based on data from WFP (2021) and FAO (2021).

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

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

Millet prices have increased over the past 1-12 months, except for markets in Mali and Ouagadougou in Burkina Faso (Table 9). In all selected markets, prices are well above their levels from 12 months ago, reaching as high as a 69% increase in Ouargaye (Burkina Faso) and a 72% increase in Kaura Namoda (Nigeria). On the contrary, in Mali, price increases were less than 0.2%. Meanwhile, Niger's current millet prices are lower than 6 months ago. The persistence of insecurity and armed conflicts in most focus countries in West Africa continue to disrupt livelihood activities and drive up food prices. Prices are expected to rise for the next 3-6 months in Burkina Faso, Mali and Niger.

Table 9: Changes in millet prices in selected West African countries[33]

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**	268	7.20	21.27	6.77	43.32	0.37	4.69
Burkina Faso	Millet	Bousse, Retail, XOF/KG**	250	23.76	39.66	20.19	55.28	12.65	19.02
Burkina Faso	Millet	Dori, Retail, XOF/KG**	264	-1.86	5.60	4.35	6.88	5.54	2.14
Burkina Faso	Millet	Faramana, Retail, XOF/KG**	167	7.74	26.52	-9.24	18.44	3.48	10.29
Burkina Faso	Millet	Gourcy, Retail, XOF/KG**	232	2.20	4.98	2.65	28.18	6.62	7.17
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG**	242	-0.41	-2.81	-7.28	13.08	-0.57	1.02
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG**	240	3.00	21.83	23.08	69.01	1.78	-11.74
Burkina Faso	Millet	Titao, Retail, XOF/KG**	179	5.92	10.49	11.88	28.78	2.98	1.76
Mali	Millet	Ansongo, Retail, XOF/KG***	213	-7.39	-22.55	-6.58	0.07	6.68	6.40
Mali	Millet	Badalabougou, Retail, XOF/KG***	210	-6.67	-6.67	-14.29	0.05	2.02	14.38
Mali	Millet	Faladié, Retail, XOF/KG***	205	2.50	2.50	-8.89	0.03	1.39	11.27
Mali	Millet	Gao, Retail, XOF/KG***	265	0.00	0.00	0.00	0.06	6.07	3.69
Mali	Millet	Kayes Centre, Retail, XOF/KG***	280	5.66	-3.45	-6.67	0.12	1.90	1.85
Mali	Millet	Niarela, Retail, XOF/KG***	200	0.00	-6.98	-11.11	0.03	-3.78	0.19
Niger	Millet	Abalak, Retail, XOF/KG****	309	5.82	29.83	-15.02	16.17	6.01	16.63
Niger	Millet	Bonkaney, Retail, XOF/KG***	262	3.97	13.91	-14.38	11.97	1.93	10.02
Niger	Millet	Goure, Retail, XOF/KG***	307	0.66	57.44	-6.69	7.34	10.10	4.17
Niger	Millet	Katako, Retail, XOF/KG***	276	3.76	36.63	-10.10	15.00	-3.41	2.20
Nigeria	Millet	Ibadan, Wholesale, Naira/KG****	236	0.00	17.12	38.82	62.76		
Nigeria	Millet	Kano, Wholesale, Naira/KG****	201	3.01	9.89	41.10	58.75		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG****	206	-0.30	9.19	33.91	72.73		
Nigeria	Millet	Lagos, Wholesale, Naira/KG****	249	11.16	21.17	22.66	61.95		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG****	205	5.67	15.49	37.82	53.27		

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

= 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 in May, sorghum prices in selected Malian markets have, in most cases, remained the same over the past 1, 3, 6, and 12 months (Table 10). Also, in Niger and parts of Nigeria, prices have moderately decreased against their levels 6 months ago. In contrast, sorghum prices have risen well above their 1, 3, and 12 months levels in selected markets of Niger, Nigeria, and Togo. Togo experienced the most price surges in the last 1-12 months, mostly exceeding 15%.

[33] Author's construction based on data from WFP (2021) and FAO (2021)

Table 10: Changes in sorghum prices in selected West African countries[34]

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***	200	-11.11	-20.00	-12.28	0.00	8.61	5.11
Mali	Sorghum	Badalabougou, Retail, XOF/KG****	200	0.00	0.00	10.50	0.00	-3.60	-3.16
Mali	Sorghum	Faladié, Retail, XOF/KG****	200	0.00	0.00	-2.91	0.00	5.14	11.52
Mali	Sorghum	Gao, Retail, XOF/KG****	250	0.00	0.00	0.00	0.00	-4.09	-6.35
Mali	Sorghum	Kayes Centre, Retail, XOF/KG***	250	0.00	-1.19	0.00	0.00	7.45	13.60
Mali	Sorghum	Niarela, Retail, XOF/KG****	181	3.43	-3.72	-9.50	0.12	-3.36	-1.54
Niger	Sorghum	Abalak, Retail, XOF/KG****	295	6.12	7.66	-8.67	67.61	11.95	15.69
Niger	Sorghum	Bonkaney, Retail, XOF/KG***	258	2.38	2.79	-7.86	6.17	-0.65	8.84
Niger	Sorghum	Goure, Retail, XOF/KG***	268	0.75	43.32	-9.76	10.74	6.00	7.53
Niger	Sorghum	Katako, Retail, XOF/KG***	255	2.41	40.11	-9.57	6.25	-3.92	13.58
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG****	220	0.00	8.64	-15.38	62.96		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG****	191	2.21	13.11	12.41	76.33		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG****	198	-2.01	10.17	0.69	69.16		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG****	216	2.08	4.60	-8.47	52.65		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG****	178	-5.59	0.00	0.00	69.05		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	280	33.33	33.33	27.27	21.74		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	250	19.05	40.45	58.23	85.19		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	295	5.36	12.60	47.50	20.41		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	250	19.05	25.00	35.14	85.19		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	300	1.35	1.01	0.00	15.38		

*Note: Last price is for May 2021, *June, **April, ***March, ****February and *****January*

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

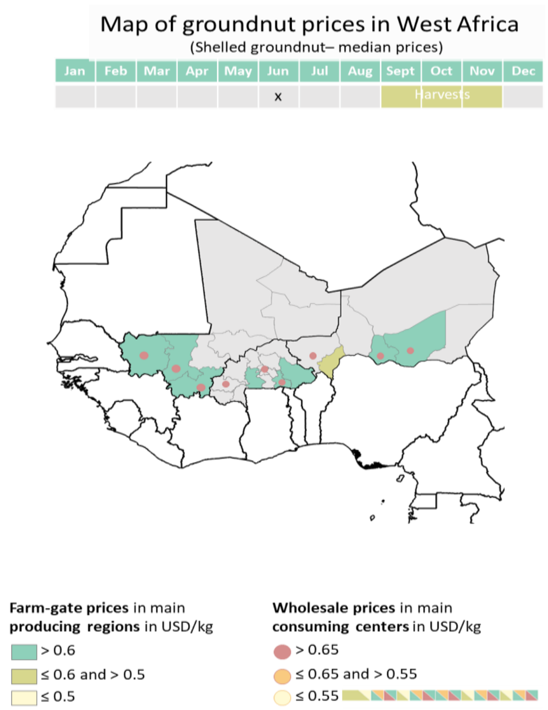

Figure 10: Map of West Africa groundnut price distribution for June 2021

[34] Author's construction based on data from WFP (2021) and FAO (2021)

Burkina Faso: There is an upward trend in groundnut prices in all the markets monitored. This increase is considered a seasonal price increase because supply is low at this time of the year due to the decline in farmers' and traders' stocks. The low supply could also be explained by the inaccessibility of most markets in the eastern production region, one of the major groundnut production regions, due to insecurity. However, there is a strong demand from countries in the sub-region, such as Ghana. Producer prices are up in the Centre-West and East regions and stable in the Centre-East region, a high production area.

Mali: Despite the decline in groundnut stocks, small trade volumes continue between surplus producer (Kayes, Koulikoro and Sikasso) regions and the main consumer regions. Exports, mainly to Côte d'Ivoire, Sierra Leone and Senegal, have fallen sharply because of the decline in national stock levels and transport difficulties linked to road haulage.

Niger: Groundnut producer prices are trending down as farmers and traders release their stocks to earn cash in advance of the upcoming planting season. Groundnut wholesale and retail prices in consumer regions are trending upwards due to increased demand, especially by traders engaged in informal exports to neighbouring countries. Prices are higher than the seasonal average because of the below-average supply, with flows disrupted by production cuts in some importing countries, conflicts and border restrictions. These high prices are also the result of high import costs in the international market and the sub-regional markets of Benin, Burkina Faso and Mali.[35]

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[35] https://fews.net/west-africa/niger/food-security-outlook/june-2021

Climatic Conditions and Potential Implications for Food and Nutrition Security

The July rainfall projections for East Africa indicate a similar trend to last month with wetter than usual conditions in parts of the region (Figure 9). These predictions are supported by the IGAD Climate Prediction and Applications Centre (ICPAC) forecasts that predict heavy to very heavy rainfall in parts of Ethiopia, Sudan and some areas of South Sudan in the first week of July. The June to September (JJAS) rainfall is critical for the agricultural season of countries in the northern parts of the East Africa region. The Southern Africa region is still off-season, and no rainfall is expected in most parts of the region except in the Western Cape, South Africa. Most parts of the West Africa region are projected to experience above-normal rainfall. Good rainfall is critical for the ongoing planting across the region.

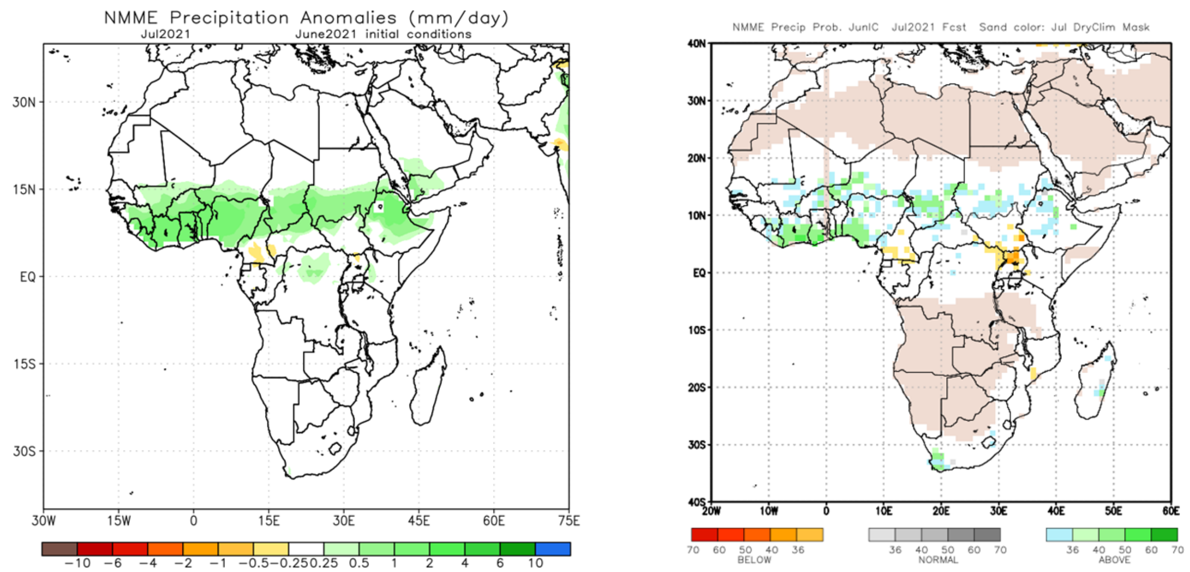

Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for July 2021, based on June 2021 initial conditions[36]

[36] 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

The June desert locust situation update from FAO[37] highlights a decline in immature swarms in northwest Somalia due to control operations and migration. Increased sightings of swarms were reported in adjacent areas of Ethiopia and Djibouti. Similar to the previous month, the ongoing control operations are important for ensuring that new swarms and breeding are controlled before they mature and spread to other parts of the region.

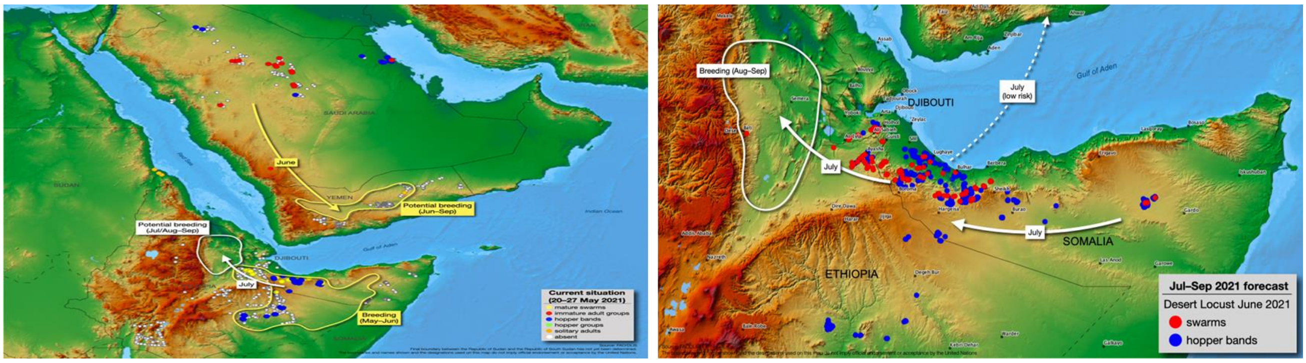

Figure 12: Situation, threat and forecast of desert locust in East Africa[38]

[37] http://www.fao.org/ag/locusts/common/ecg/1914/en/DL513e.pdf. Accessed 4 July 2021
[38] http://www.fao.org/ag/locusts/common/ecg/75/en/210527DLupdate.jpg. Accessed 28 May 2021 and http://www.fao.org/ag/locusts/common/ecg/75/en/DL513map_pg1e.jpg. Accessed 4 July 2021

Nairobi, Kenya, has been picked to host AGRF 2021 Summit

The Forum, which is currently slated for September 7 – 10, 2021, is expected to have 500 in-person attendance with another 10,000 attendees expected to join virtually from more than 150 countries.

A delegation led by former Ethiopian Prime Minister and AGRA's Board Chair H.E. Hailemariam Dessalegn and President Dr Agnes Kalibata informed Kenya's President Uhuru Kenyatta that Nairobi had been chosen as a host because of the strides made within the agricultural sector. The sector is a key priority for the Kenyan government - Kenya has allocated Kshs 60billion for agriculture in the new financial year.

The AGRF is the world's premier Forum for African agriculture, bringing together stakeholders in the agricultural landscape to take practical actions and share lessons that will move African agriculture forward.

The Forum is designed to energize political will and advance the policies, programs and investments required to achieve an inclusive and sustainable agricultural transformation across the continent. The AGRF also works explicitly to help African countries and the continent make continuous progress in achieving the vision set out in the Malabo Declaration, the related Comprehensive Africa Agriculture Development Programme (CAADP), and the Sustainable Development Goals (SDGs), and Africa's Agenda 2063.

Food Trade Coalition for Africa

food trade coalition for africa

The Food Trade Coalition for Africa was launched at the African Green Revolution Forum (AGRF) in 2019. It is a unique Coalition that brings together players in African food and trade, leveraging on their diverse views, experiences and knowledge to coordinate food trade investments and policy interventions across the continent. The members of the Coalition include representatives within the African and international community; regional economic communities, the private sector, research institutions, development agencies, academia and think-tanks. With the combined strengths of its members and partners, the Coalition aims to build a stronger consensus on food trade policy, and increase policy coherence and predictability.

The Coalition has established two Task Forces: (i) **Food and Nutrition Security Data and Hunger Hotspots** TF, and (ii) **Logistics and Trade Corridors** TF, and two Thematic Working Groups: (i) **Women in Food Trade** TWG (ii) **Food Safety and Nutrion** TWG. These task forces and thematic working groups are mechanisms through which the Coalition is able to focus on specific areas that affect food trade and have more deliberate interventions around those focus areas.

The Coalition held its **General Assembly** in Accra, Ghana from on June 29 – 30, the GA was opened by the Deputy Minister of Trade Hon. Okyere Baafi on behalf of Hon. Alan Kyerematen, Minister of Trade and Industry Ghana. The Coalition also hosted two addition events. One was a **Policy Dialogue** on Policy Responses to Shocks that Significantly Impact the Food System with Special Remarks delivered by Richard Sandall, Acting Development Director, UK- Foreign, Commonwealth and Development Office (FCDO), Ghana. The second was the **Regional Food Balance Sheet – Private Sector Engagement** in conjuction with COMESA.

Some of the key messages from these engagements were around intensfiying engagement with the African Continental Free Trade Area Secretariat; addressing challenges around nontariff barriers, state interventions in trade, non-harmonization of standards, inadequate access to finance; monitroing food trade flows along key trade corridors; prioritizing the empowerment of women in regional value chains; support to the functioning of informal markets and cross-border trade; and strengthening the performance of food value chains.

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