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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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 August Food Security Monitor are summarised below.

Food Security Outlook. In August 2021, South Sudan, Burkina Faso, Niger and Mali were the four Food Insecurity Hotspots - countries where more than 50% of the total population has insufficient food.

In East Africa, the COVID-19 pandemic is continuing to contribute to high levels of food insecurity, particularly among urban households, where income-generating activities have been affected by various containment measures.

A similar situation is experienced in Southern Africa, where COVID-19's third wave has slowed down economic activities and cross-border trade in countries where containment measures have been imposed.

In West Africa, persistent high levels of conflict across parts of the region continue to drive crisis food security outcomes as livelihood activities, and food distribution efforts are disrupted.

Food Trade. In East Africa, recent statistics show that trade between Tanzania and Kenya has increased following bilateral discussions between the two countries.

Meanwhile, truck drivers from across Southern Africa are threatening to blockade Mozambican border posts in protest of corrupt behaviour by the Mozambican traffic police.

In West Africa, the Ghanaian government has identified 100 potential companies to be guided into the African market with the implementation of the African Continental Free Trade Agreement (AfCFTA).

Commodity Prices. Except for Ethiopia and South Sudan, maize prices in East African markets remained well below their one-year levels, exceeding, in most cases, 15%.

In Southern Africa, maize prices in Malawi and Mozambique continue to decline, while Zambia continues to experience a higher increase, despite recent bumper harvests.

In West Africa, markets continue to experience high maize price increases, except for the Korhogo market in Cote d'Ivoire and the Gao market and Kayes Center in Mali.

Climatic conditions. The central and southern parts of the East Africa region are expected to experience significant rainfall deficits. The dry conditions are predicted to impact the main cropping season of October to December severely.

In Southern Africa, no rainfall is expected in the off-season. However, preparations are ongoing in the forthcoming main cropping season.

Meanwhile, in West Africa, projections continue to show above-normal rainfall, particularly along the coastal areas providing favourable cropping conditions for the main seasons cereals season.

Desert Locust Outbreak. The current desert locust upsurge in the Horn of Africa could prolong due to persistent insecurity, which has hampered ground and aerial access to the breeding locations, negatively affecting control interventions.

Introduction

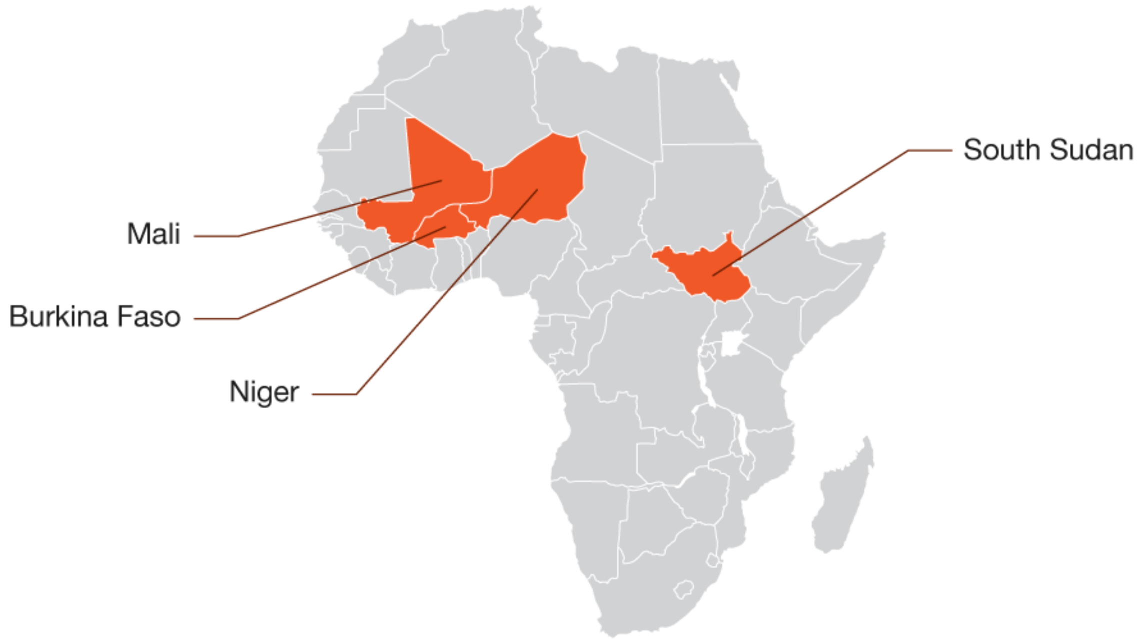
The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade and food and nutrition security. The discussions presented focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Rwanda, Tanzania and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe), and West Africa (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Outlook

Food Insecurity Hotspots

The number of Food Insecurity Hotspots, defined as countries where more than 50% of the total population has insufficient food for consumption, remained at four in August 2021. These countries include South Sudan (60%), Burkina Faso (57%), Niger (55%) and Mali (56%)[1].

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



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

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

East Africa Outlook

Conflict and weather shocks continue to drive an IPC Phase 3 (Crisis) food security outcome across East Africa. The COVID-19 pandemic is also contributing to high levels of food insecurity, particularly among urban households, where income-generating activities have been affected by various containment measures, especially in Kenya, Uganda and Rwanda[3].

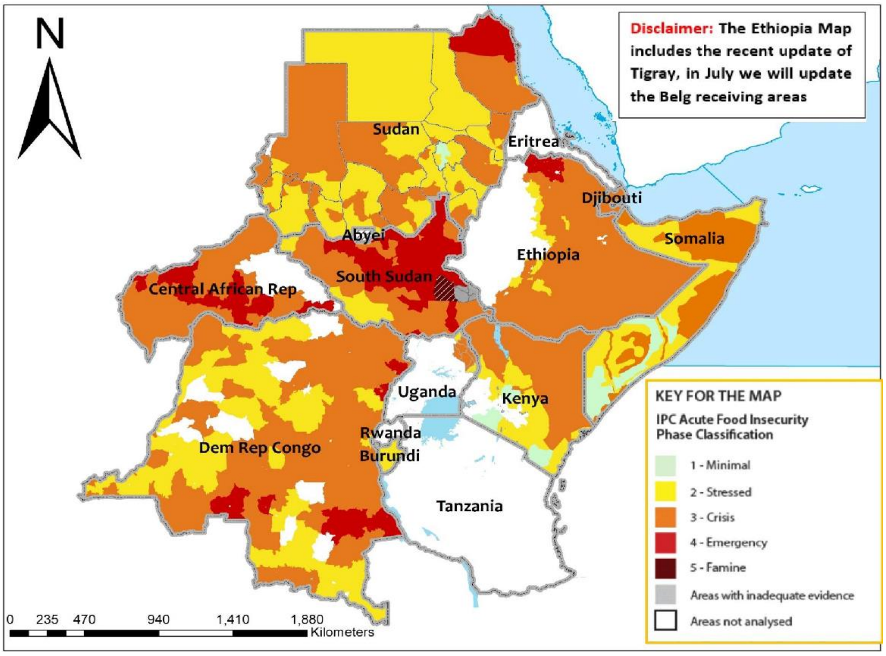


Figure2: East Africa IPC Regional Map July 2021

Prevalence of Insufficient Food Consumption in East Africa

The number of people with insufficient food for consumption across the selected focus countries in East Africa was 61.8 million in August 2021. This represents a 14.4 percent increase from July 2021, indicating that the food security situation deteriorated across the region (***Table 1***). Ethiopia recorded an increase in the number of people with insufficient food, while South Sudan, Kenya, Tanzania and Uganda recorded decreases. In Rwanda, the situation did not change from July.

Table 1: Prevalence of insufficient food consumption across selected East African countries (August 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 (%)
Ethiopia	109.20	16.90	24.90	22.80%	47.34% ↑	7.20%	36.80%
Kenya	51.40	8.00	7.80	15.18%	-2.50% ↓	4.20%	26.20%
Rwanda	12.30	2.50	2.50	20.33%	0.00% ●	2.30%	38.30%
South Sudan	11.00	6.00	6.60	60.00%	10.00% ↑	22.70%	31.30%
Tanzania	56.30	5.60	5.10	9.06%	-8.93% ↓	3.50%	31.80%
Uganda	42.70	15.00	14.90	34.89%	-0.67% ↓	3.50%	28.90%

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

[3] https://fews.net/east-africa Accessed 28 August 2021
[4] https://hungermap.wfp.org/ Accessed on 30 August 2021.

Southern Africa Outlook

The COVID-19 third wave, currently at its peak across most Southern African countries, has slowed down economic activities and cross-border trade activities in countries where containment measures have been imposed: South Africa, Mozambique, Zimbabwe, the Democratic Republic of the Congo (DRC), and Malawi. Varied food security outcomes ranging from IPC phase 1 in Malawi to IPC phase 3 outcomes in northern parts of Mozambique, where conflicts continue to disrupt livelihood activities, are expected to persist until the end of September[5].

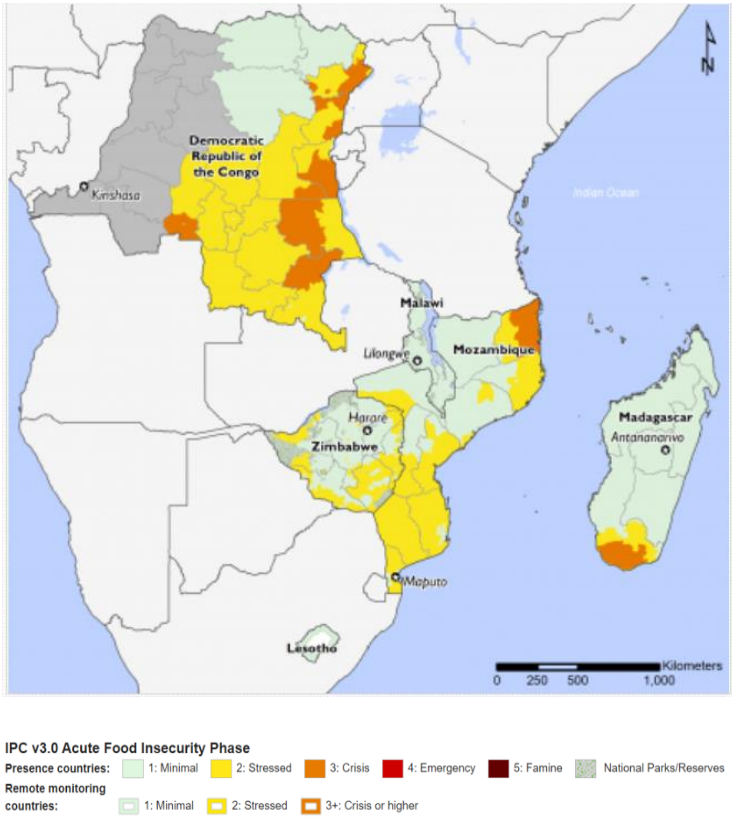


Figure 3: Southern Africa countries Food Security Outlook, June-September 2021

Prevalence of Insufficient Food Consumption in Southern Africa

The number of people with insufficient food for consumption across selected focus countries in Southern Africa was 21.1 million in August 2021. This was a 5.8 percent decrease from July, indicating that the region's food security situation improved over the past month. Malawi recorded an increase in the number of people with insufficient food for consumption. Mozambique recorded a decrease, while no change was reported in Zambia and Zimbabwe.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (August 2021)[6]

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	2.20	2.30	12.71%	4.55% ↑	1.30%	39.00%
Mozambique	29.50	12.20	10.80	36.61%	-11.48% ↓	4.40%	42.30%
Zambia	17.40	2.20	2.20	12.64%	0.00% ●	4.20%	34.60%
Zimbabwe	14.40	5.80	5.80	40.28%	0.00% ●	2.90%	23.50%

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

[5] https://fews.net/southern-africa. Accessed 30 August 2021.
[6] https://hungermap.wfp.org/ Accessed on 30 August 2021.

West Africa Outlook

The majority of the West African Region is expected to experience a predominantly IPC Phase 1 and Phase 2 until January 2022[7]. Persistent high levels of conflict across parts of the region continue to drive crisis food security outcomes as livelihood activities and food distribution efforts are disrupted. The COVID-19 containment measures and restrictions at some border posts are affecting trade activities between countries in the region, such as Burkina Faso and Benin, contributing to food insecurity situations, particularly among informal cross border traders. The containment measures slowed trade activities leading to seasonal food shortages, driving above-average food prices, further worsening food security outcomes in parts of the region.

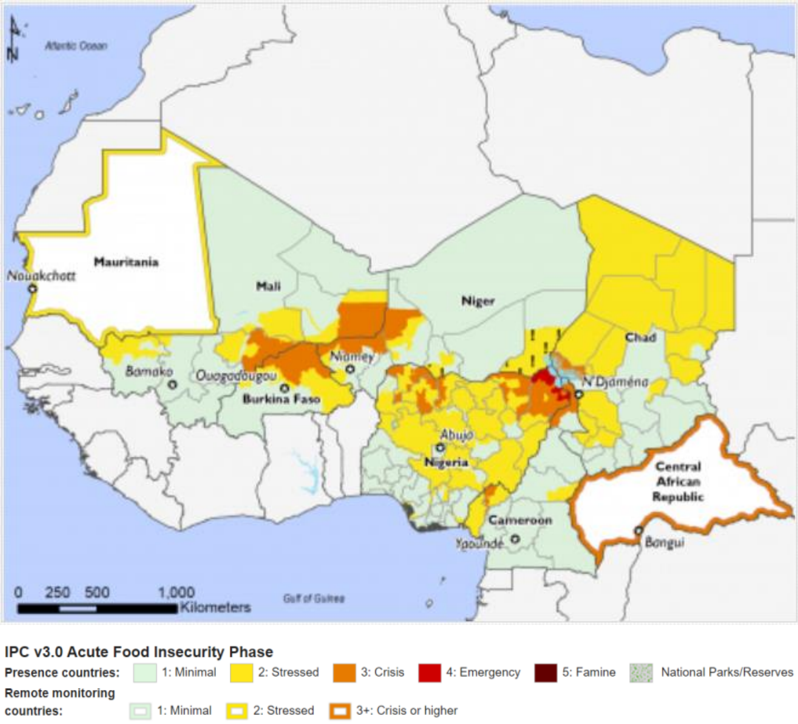


Figure 4: West Africa countries Food Security Outlook, June-September 2021

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 108.6 million in August 2021. This was a 9.4 percent increase from July, suggesting that the region's food security situation deteriorated over the past month. Burkina Faso, Cote d'Ivoire, Mali, Niger and Nigeria recorded an increase in people with insufficient food for consumption. Meanwhile, Ghana and Togo recorded a decrease in the same period (*Table 3*).

Table 3: Prevalence of insufficient food consumption in selected West African countries, August 2021[8]

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	10.00	11.30	57.07%	13.00%	↑	8.40%	24.90%
Cote d'Ivoire	25.10	4.20	4.50	17.93%	7.14%	↑	6.10%	21.60%
Ghana	29.80	5.90	5.50	18.46%	-6.78%	↓	6.80%	17.50%
Mali	19.10	10.10	10.70	56.02%	5.94%	↑	9.00%	26.90%
Niger	22.40	11.30	12.40	55.36%	9.73%	↑	14.10%	48.50%
Nigeria	202.80	55.30	62.00	30.57%	12.12%	↑	6.80%	36.80%
Togo	7.90	2.50	2.20	27.85%	-12.00%	↓	5.70%	23.80%

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

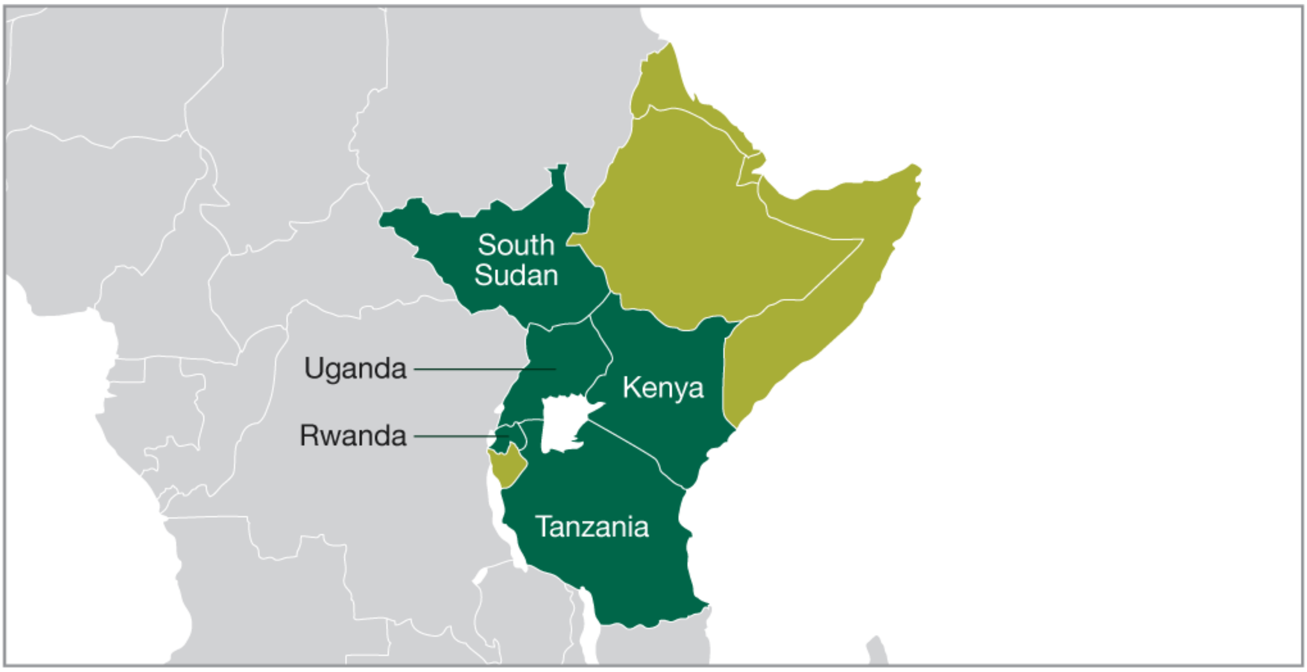
[7] https://fews.net/west-africa Accessed 03 September 2021
[8] https://hungermap.wfp.org/ Accessed on 30 August 2021

Food Trade Updates

East Africa

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 in August 2021.

Figure 5: East Africa Cross border trade updates August 2021[9]



RWANDA

- COVID-19 restrictions continue to disrupt trading activities with importers reporting that they cannot access commodities from China leading local prices to skyrocket.
- Importers also reported that should the situation persist their current stocks will be depleted in a month.

SOUTH SUDAN

- South Sudan and Sudan have agreed to open their borders after 11 years in a move that will also benefit small traders between the two countries.
- The ongoing insecurity situation in South Sudan has seen traders in the country incur huge losses with hundreds of consignments remain uncollected at the Mombasa port after transporters suspended services citing insecurity in Juba.

[9] https://www.theeastafrican.co.ke/tea/business/rwandan-importers-face-supply-shortages-3497554 Accessed 29 August 2021
https://nation.africa/kenya/business/uganda-angered-by-7pc-kenyan-levy-on-its-milk-3494570 Accessed 29 August 2021
https://www.theeastafrican.co.ke/tea/business/uganda-trade-deficit-widens-as-imports-from-tanzania-hit-19pc-3498698 Accessed 29 August 2021
https://www.monitor.co.ug/uganda/business/finance/uganda-s-monthly-commodity-export-earnings-fall-to-shs1-5t-in-june-3522752 Accessed 29 August 2021
https://www.businessdailyafrica.com/bd/economy/tz-imports-overtake-exports-kenya-for-first-time-3506952 Accessed 29 August 2021
https://www.businessdailyafrica.com/bd/opinion-analysis/editorials/kenya-uganda-should-improve-trade-relations-3507028 Accessed 29 August 2021
https://taarifa.rw/tanzania-exports-to-kenya-dwarf-its-imports/ Accessed 29 August 2021
https://www.businessdailyafrica.com/bd/markets/commodities/horticulture-exporters-sue-to-block-new-levy-3517654 Accessed 29 August 2021
https://www.businessdailyafrica.com/bd/economy/bill-proposes-tougher-sugar-import-rules-to-curb-glut-3521256 Accessed 29 August 2021
https://www.businessdailyafrica.com/bd/economy/kenya-s-food-imports-bill-surges-to-record-sh103bn-3521236 Accessed 29 August 2021
https://dailynews.co.tz/news/2021-08-0961113d9de3336.aspx 29 August 2021
https://www.theeastafrican.co.ke/tea/business/kenya-tanzania-set-december-deadline-to-remove-trade-barriers-3523660 29 August 2021
https://dailynews.co.tz/news/2021-08-2461249016d44b1.aspx 29 August 2021

TANZANIA

- Recent statistics show that trade between Tanzania and Kenya has increased with maize bags traded jumping from 16,137 bags in April to a monthly record of 118,329 in May following bilateral discussions between the two countries.
- Tanzania and Kenya have set December 2021 as target time when the two neighbouring countries will have resolved most of the non-tariff barriers affecting cross-border trade.
- Tanzania and Burundi recently held a meeting to discuss business flow in a move that will see trade ties between the two countries flourish.

UGANDA

- Uganda is protesting Kenya's delay in abolishing a seven percent levy on milk imports following recent bilateral talks meant to resolve the stalemate. Kenya attributes this to the third wave of COVID-19 that has hit Uganda.
- Recent statistics from the Ministry of Finance, Bank of Uganda and Uganda Bureau of Statistics (UBOS) shows the Uganda trade deficit widening as imports from Tanzania hit 19 percent. This has seen Tanzania replace Kenya as Uganda's biggest source of imports in the region.
- Uganda's foreign earnings from commodity exports in the international market fell in the month of June 2021 due to a decline in export receipts from some commodities. This is reportedly due to lower export receipts of commodities like mineral products, tea, tobacco and maize

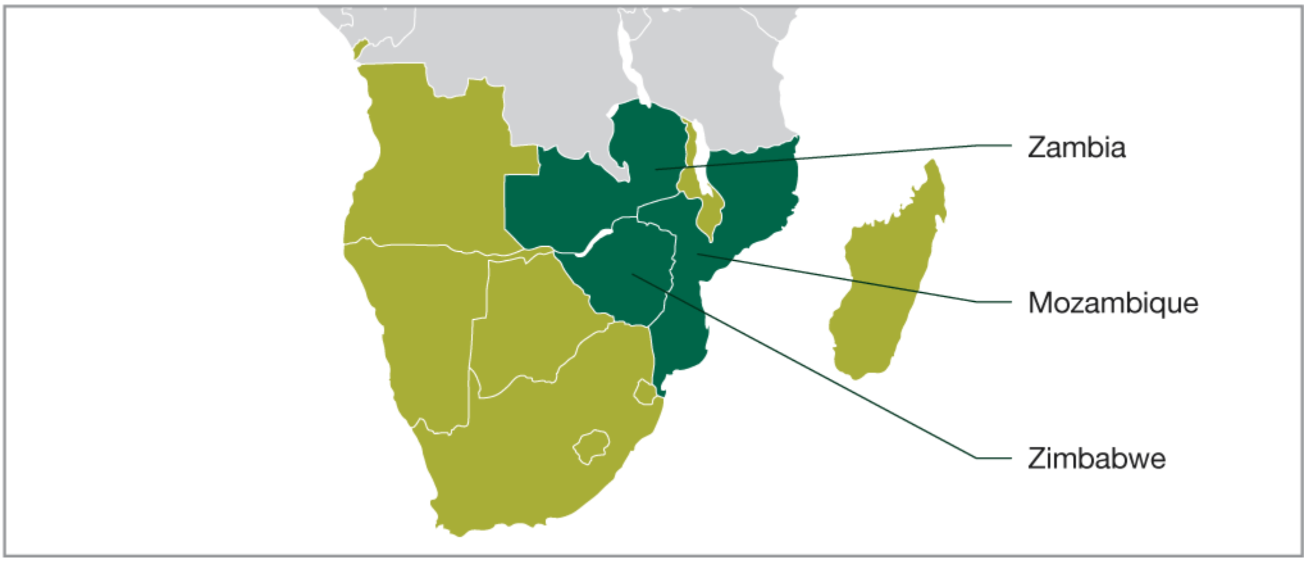
KENYA

- Kenya's imports from Tanzania have exceeded exports for the first time in decades with recent data from the Central Bank of Kenya showing that imports grew nearly three-quarters in the six months to June 2021.
- Kenya's exports to Uganda continue to decline as trade relations between the two countries remain constrained. Recent data shows that the value of Kenya's exports to Uganda stood at Sh9.05 billion ($83.25 million) in April before sliding to Sh7.8 billion ($71.78 million) and Sh7.2 billion ($66.85 million) in May and June respectively.
- Fresh produce exporters have moved to court to stop the implementation of a 0.25 percent levy that the Horticulture Directorate is banking on for development projects including putting up a fumigation plant.
- The government is proposing a bill that will require sugar dealers to present proof of sugar shortage in the domestic market before they can be allowed to import in a move that is expected to curb the sugar glut in the country.
- Kenya cut its sugar imports from Uganda by 79 percent in a move that is likely to escalate the ongoing trade dispute between the two countries.
- The value of Kenya's external trade rose by 24.3 per cent across six months to June to stand at Ksh.1.36 trillion from a lower Ksh.1.094 trillion last year. This is due to rebounding global and macroeconomic economic conditions as the world re-emerges from COVID-19 related disruptions.

Southern Africa

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 August 2021[10]



MOZAMBIQUE

- Truck drivers from across Southern Africa are threatening to blockade Mozambican border posts, in protest against corrupt behaviour by the Mozambican traffic police.

ZAMBIA

- Zambia has banned the export of soya and sunflower meals, which are major source of animal feed in Kenya. This has resulted in sharp increase in animal feed prices in Kenya as soya prices have doubled.

ZIMBABWE

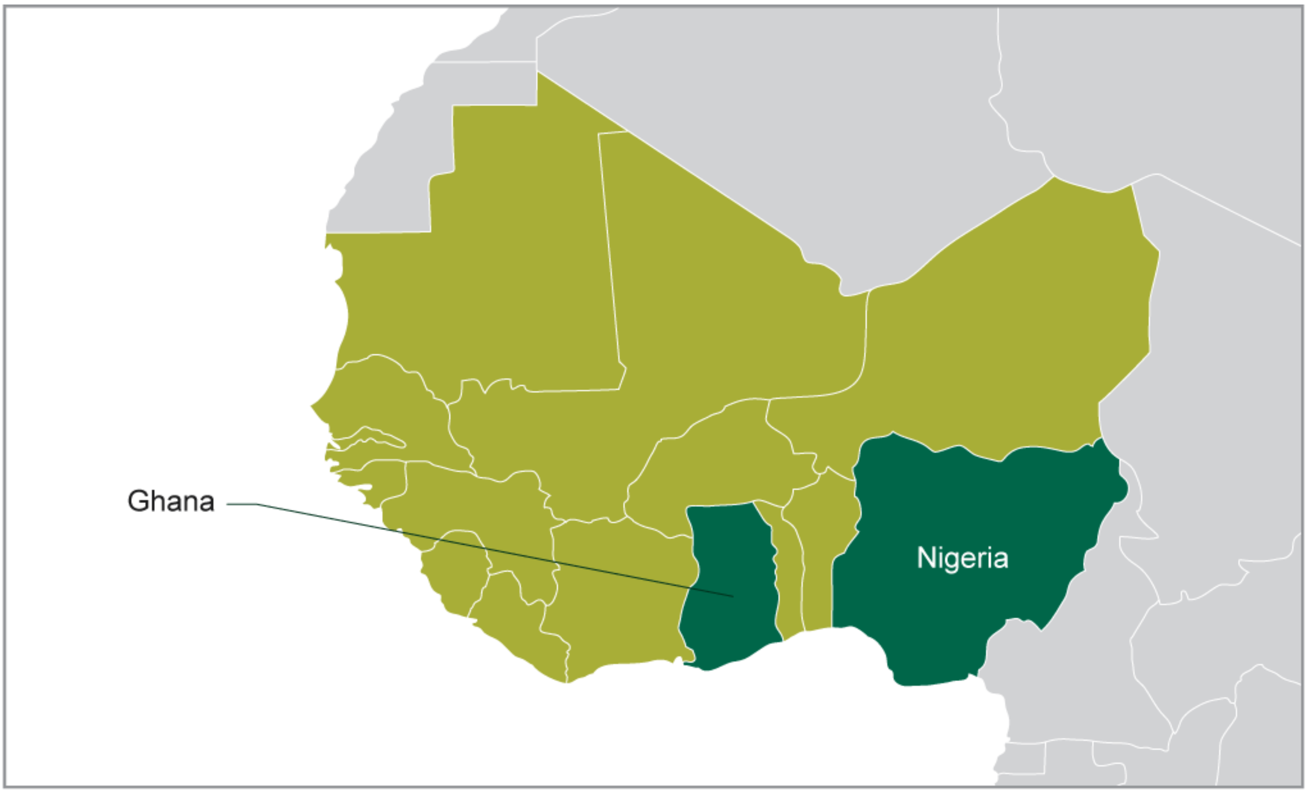
- Recent data shows that cereal imports, including maize, dropped to 1.9 percent in the five months to May 2021 from 9.1 percent in January as the country continues to enjoy benefits from this year's bumper harvest. This has seen the country save US$38.1 million on its import bill
- Zimbabwe has recorded a 50 percent decline in cross-border movement as a result of tighter lockdown measures.
- Zimtrade has urged local farmers to invest into the US$1.7 million Bambara nuts (nyimo/indlubu) export market covering countries like the USA, UK and the Netherlands among others.
- The Zimbabwean government has announced that the newly upgraded commercial terminal at the Beitbridge border post will open to commercial traffic on the 6th of October. Upon completion the post is expected to carry five times its current handling capacity
- Zimtrade has encouraged exporters in the country take advantage of the new direct flights from to Qatar which offer new trade opportunities and lower export costs.

[10] https://www.herald.co.zw/good-harvest-knocks-imports/ Accessed 29 August 2021
https://southerntimesafrica.com/sadc-truckers-threaten-moza-blockade/ Accessed 29 August 2021
https://www.newzimbabwe.com/zim-farmers-urged-to-tap-into-us17-million-bambara-nuts-export-market/ Accessed 30 August 2021
https://www.newsday.co.zw/2021/08/zim-records-decline-in-cross-boarder-movement/ Accessed 30 August 2021
https://www.newzimbabwe.com/zimbabwe-saves-us381-million-as-import-bill-declines/ Accessed 30 August 2021
https://allafrica.com/stories/202109010074.html Accessed 03 September 2021
https://www.businessdailyafrica.com/bd/markets/commodities/zambia-material-export-sends-feed-prices-record-high-3531764 Accessed 03 September 2021
https://www.chronicle.co.zw/qatar-offers-fresh-market-for-zimbabwe-products/ Accessed 03 September 2021.

West Africa

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 August 2021[11]



GHANA

- The Ministry of Trade and Industry (MoTI) has identified some 100 potential companies to be guided into the African market with the implementation of the African Continental Free Trade Agreement (AfCFTA).
- The move, which is under the 'Facilitation programme for companies exporting under AfCFTA,' a strategic project by MoTI, forms part of efforts to get local companies to leverage the opportunities presented by the continental trade programme.

NIGERIA

- The Federal Ministry of Industry Trade and Investment has obtained a $1 billion syndicated term loan for Micro, Small and Medium Enterprises (MSMEs) in agribusiness through the Bank of Industry (BOI).

[11] https://www.ghanaweb.com/GhanaHomePage/business/AfCFTA-Trade-Ministry-to-facilitate-entry-of-100-firms-into-African-market-1323916 Accessed 29 August 2021
https://www.vanguardngr.com/2021/08/trade-ministry-secures-1b-agribusiness-loan-for-msmes/ Accessed 29 August 2021

Agricultural Commodities Price Monitoring

East Africa

Except for Ethiopia and South Sudan, maize prices in selected East African markets remained well below their one-year levels, exceeding, in most cases, 15%. Similarly, except in Ethiopia and Uganda, maize prices are also below their six months levels. Uganda experienced a price surge over the past 1-6 months, mostly exceeding 15% in all selected markets. Insecurity, dry spells, and COVID-19 restrictions are the major causes of this trend.[12] On the other hand, Tanzania's maize prices have declined for the past 1-12 months, except in the Dodoma market. There is, however, a mixed prediction of how prices will fluctuate in the next 3-6 months. Although some prices surged in Kenya and Rwanda compared to the past 1-3 months, these increases were mainly moderate (0-5%). In Rwanda, prices are expected to increase, exceeding 15%, in the next 3-6 months. Weather shocks, particularly below-average rainfall, and conflicts are the main drivers of unfavourable prices in the East African region, particularly Ethiopia and Uganda.[13]

Table 4: Changes in maize prices in selected East African Countries[14]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
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	0.59	7.66	7.88	-22.27		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG**	33	0.21	-8.68	-0.88	-1.44		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG**	28	-7.56	0.51	3.27	-25.05		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG**	190	1.18	-6.94	-49.89	-32.14	19.47	29.48
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	253	1.33	1.33	-40.47	-15.56	16.67	24.34
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	182	-6.03	-5.22	-44.95	-31.01	42.02	44.92
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	200	0.00	2.34	-36.30	-25.23	26.09	37.45
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG**	232	22.88	8.14	-13.90	22.88		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG**	375	-0.38	-7.93	-12.48	70.93		
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	0.00	14.29	48.70		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG**	306	7.10	7.10	-8.22	50.42		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG**	45,545	-0.45	-1.70	-13.15	-20.71	-22.34	-20.02
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG**	51,909	37.51	5.34	-8.84	7.46		
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG**	36,667	-6.73	-22.22	-33.26	-34.52	9.72	10.19
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG**	45,415	-0.36	-7.79	-20.44	-19.81	-12.96	3.59
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**	846	38.30	12.80	8.61	-18.01		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG**	836	21.78	52.03	11.32	-7.25		
Uganda	Maize (white)	Lira, Wholesale, USh/KG**	769	27.48	47.82	16.24	-16.21		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG**	766	25.05	46.56	20.53	-19.51		

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

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

[12] FEWSNET, 2021. https://fews.net/east-africa/uganda. Accessed 24 August 2021
[13] FEWSNET, 2021. https://fews.net/east-africa. Accessed 24 August 2021
[14] Author's construction based on data from WFP (2021) and FAO (2021)

Beans prices in Tanzania and Uganda have mostly declined compared to 1-12 months ago. In Rwanda, current beans prices are well below their levels in 6-12 months ago but generally above their past 1-3 months levels. The reinstatement of COVID-19 restrictions in Rwanda has had an immediate effect on prices. However, this was compensated by the government's food relief programmes and the availability of other inter-season crops such as sweet potato, cassava, and banana.[15] Prices are expected to remain moderately lower in the next three months but would generally rise in the next six months in Rwanda and Tanzania.

Table 5: Changes in bean prices in selected East African Countries[16]

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**	323	6.91	-20.49	-42.43	-52.10	-5.88	-26.36
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	458	1.85	-8.33	-12.23	-26.08	8.76	7.84
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	440	28.16	3.53	-10.20	-27.74	1.99	2.31
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	450	16.63	1.07	-6.17	-25.65	-1.61	10.20
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG**	152,955	1.29	-3.73	-17.07	-11.76	-8.30	-1.81
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG**	206,409	-1.73	2.92	-7.59	17.54	-2.73	9.26
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG**	118,889	-12.74	-21.53	-30.58	-34.86	13.94	42.09
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG**	187,500	-0.88	-7.98	-10.98	-1.32	-7.66	5.58
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***	2,425	-7.47	4.69	-0.94	-24.73		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG**	1,406	-35.59	-41.77	-14.79	-35.78		

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

= 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 are well above the previous 12 months levels but generally below their 6 months levels in selected markets in Ethiopia, Rwanda and South Sudan (Table 6). Generally, South Sudan's sorghum prices in June are lower than levels in May and March this year. Ethiopia continues to experience price surges due mainly to ongoing conflicts.

Table 6: Changes in sorghum prices in selected East African Countries[17]

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*****	18	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***	370	-6.05	0.09	-10.75	19.00	-12.58	10.06
Rwanda	Sorghum	Mugera, Retail, RWF/KG***	322	2.78	-7.50	-32.73	-2.63	1.22	-8.84
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	350	0.00	2.94	-27.08	16.67	-0.73	-6.73
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG**	173	-23.00	-34.91	-23.10	-10.09		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG**	374	-2.97	-9.54	-12.79	69.34		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG***	343	-11.11	7.82	14.29	104.08		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG***	329	-4.17	-4.17	-12.15	86.99		

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

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

[15] FEWSNET, 2021. https://fews.net/east-africa/rwanda. Accessed 24 August 2021
[16] Author's construction based on data from WFP (2021) and FAO (2021).
[17] Author's construction based on data from WFP (2021) and FAO (2021).

Southern Africa

Maize prices in Malawi continue to decline well below their levels over 1-12 months ago, except in Mzuzu, Nsanje, and the national average, where current prices are higher than their one-month levels. Similar trends have been observed in Mozambique, where prices are lower now than in the past 1-12 months, except for in Massinga. Despite the recent bumper harvests, Zambia continues to experience a higher increase (>15%) in maize prices than in the past 1-12 months due to a slowdown in trade related to recent election activities. Macroeconomic factors and COVID-19 related impacts were also instrumental in these price increases. Prices are expected to recover in the next 3-6 months, in most cases decreasing beyond 18%, following the trickle-down effect of the good harvests and improvement in the flow of trade due to the completion of the national election.

Table 7: Changes in maize prices in selected Southern African Countries[18]

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**	115	-5.18	-30.40	-29.10	-20.49		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG**	150	23.20	-16.67	-11.76	4.90		
Malawi	Maize (white)	National Average, Retail, MWK/KG**	133	5.13	-26.58	-33.54	-23.53		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG**	155	10.48	-12.37	-27.56	-22.67		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG**	13	-7.50	-14.46	-24.45	-6.57	13.82	7.64
Mozambique	Maize (white)	Maputo, Retail, MZN/KG**	27	-3.72	-10.40	-5.01	3.63	-0.74	-2.39
Mozambique	Maize (white)	Massinga, Retail, MZN/KG**	28	54.30	18.39	0.00	38.10	-34.43	-22.52
Mozambique	Maize (white)	Pemba, Retail, MZN/KG**	17	-38.15	-51.62	-44.46	0.00	50.76	49.12
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG***	4	4.74	4.74	14.81	48.32	5.88	-18.78
Zambia	Maize (white)	Chipata, Retail, ZMW/KG***	5	21.34	19.19	41.74	50.32	-20.76	-33.90
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG***	5	26.56	23.22	46.39	67.99	-25.48	-43.90
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG***	6	33.65	26.50	49.87	35.24	-23.42	-26.76
Zambia	Maize (white)	Mpika, Retail, ZMW/KG***	5	59.46	59.46	83.74	112.40	-25.24	-50.66

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

= 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

Except for the Korhogo market in Cote d'Ivoire and the Gao market and Kayes Center in Mali, all selected West African markets continued to experience high maize price increases (>15%) over the past 1-12 months. Interruptions in the agricultural season and trade due to conflicts, seasonal declines in supplies, and COVID-19 restrictions are the main drivers of the high food inflation in the West African region.[19] Poor macroeconomic conditions perpetuate the price surge, apart from the conflicts, insecurity, and COVID-related impacts in Nigeria. In addition, below-average rainfall and insecurity contribute to below-average farming activities that are expected to affect future prices. In the next 3-6 months, maize prices are expected to improve in Cote d"Voire, Ghana, and Mali due to increasing supplies from seasonal harvests.

Table 8: Changes in maize prices in selected West African countries[20]

[18] Author's construction based on data from WFP (2021) and FAO (2021).
[19] FEWSNET, 2021. https://fews.net/west-africa. Accessed 25 August 2021.
[20] Author's construction based on data from WFP (2021) and FAO (2021).

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	231	-2.63	-2.63	-7.50	-2.63	-11.42	-13.53
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG	300	-4.00	33.33	50.00	11.63	-26.35	-35.49
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	320	0.00	21.01	37.14	81.82	-11.38	
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	238	10.09	60.57	39.44	121.85	-7.22	
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	405	5.00	36.31	40.00	89.07	-2.71	
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	262	13.22	41.37	69.83	142.86	-43.10	
Mali	Maize (white)	Ansongo, Retail, XOF/KG	247	10.76	23.50	23.50	23.50	-12.37	-22.60
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	225	-2.17	2.86	28.57	33.14	1.27	-9.80
Mali	Maize (white)	Faladié, Retail, XOF/KG	219	6.83	9.50	25.14	25.14	-5.36	-16.11
Mali	Maize (white)	Gao, Retail, XOF/KG	225	0.00	0.00	0.00	0.00	-5.96	-7.89
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	250	0.00	0.00	23.15	21.95	-11.02	-13.36
Mali	Maize (white)	Niarela, Retail, XOF/KG	219	9.50	9.50	25.14	25.14	-16.35	-17.26
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG***	223	1.36	1.36	46.47	71.54		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG***	190	-7.07	-4.09	32.85	68.65		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG***	188	2.98	4.15	28.66	67.83		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG***	219	2.70	11.04	49.83	55.80		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG***	195	1.30	2.63	31.09	65.25		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG**	250	8.70	42.86	85.19	78.57		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG**	262	4.80	51.45	51.45	101.54		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG**	250	0.00	31.58	87.97	85.19		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG**	240	-9.43	20.00	25.00	45.45		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG**	240	4.35	25.00	77.78	77.78		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG**	280	3.70	32.08	45.83	56.42		

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

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

For the past 1-12 months, except for Badalabougou, millet prices in most selected markets in Mali continued to decline. Generally, millet prices have improved, remained the same or experienced a low increase (0-5%) over the past one month in all selected markets in West Africa. This general improvement is also reflected in the forecast of millet prices in the next 3-6 months in Burkina Faso, Mali, and Niger due to improved supplies. Nonetheless, millet prices remained higher than their past 6-12 months in Burkina Faso, Niger, and Nigeria, mainly due to conflicts and insecurity in the region.

Table 9: Changes in millet prices in selected West African countries[21]

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	316	0.32	17.91	42.99	55.67	0.20	-10.62
Burkina Faso	Millet	Bousse, Retail, XOF/KG	223	-6.69	-10.80	24.58	-16.79	11.35	-0.65
Burkina Faso	Millet	Dori, Retail, XOF/KG	275	-1.08	4.17	10.00	3.00	-2.84	-13.40
Burkina Faso	Millet	Faramana, Retail, XOF/KG	157	0.64	-5.99	18.94	3.97	8.08	-5.01
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	228	1.33	-1.72	3.17	12.32	1.08	-4.07
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	248	0.40	2.48	-0.40	8.30	1.36	-3.05
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	232	-1.69	-3.33	17.77	45.91	-12.88	-14.07
Burkina Faso	Millet	Titao, Retail, XOF/KG	204	10.87	13.97	25.93	40.69	-4.38	-16.79
Mali	Millet	Ansongo, Retail, XOF/KG	200	-13.04	-6.10	-14.89	-14.89	4.91	5.30
Mali	Millet	Badalabougou, Retail, XOF/KG	213	3.90	3.27	3.40	6.50	-1.13	-1.18
Mali	Millet	Faladié, Retail, XOF/KG	200	0.00	0.00	0.00	0.00	1.98	1.94
Mali	Millet	Gao, Retail, XOF/KG	265	0.00	0.00	0.00	6.00	-4.75	-6.79
Mali	Millet	Kayes Centre, Retail, XOF/KG	273	-0.73	-9.00	5.81	9.20	-0.50	-2.09
Mali	Millet	Niarela, Retail, XOF/KG	200	0.00	0.00	0.00	0.00	0.44	0.61
Niger	Millet	Abalak, Retail, XOF/KG	336	0.00	0.90	15.07	4.02	-2.51	7.26
Niger	Millet	Bonkaney, Retail, XOF/KG	294	0.00	6.91	21.49	11.36	-9.17	-1.96
Niger	Millet	Goure, Retail, XOF/KG	351	10.03	7.67	23.59	5.25	-3.70	-8.89
Niger	Millet	Katako, Retail, XOF/KG	294	0.00	6.91	25.64	6.23	-9.32	-4.06
Nigeria	Millet	Ibadan, Wholesale, Naira/KG***	236	0.00	0.64	38.82	62.76		
Nigeria	Millet	Kano, Wholesale, Naira/KG***	197	-1.79	2.46	41.70	42.45		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG***	203	-1.55	-3.38	32.60	65.70		
Nigeria	Millet	Lagos, Wholesale, Naira/KG***	249	0.10	16.61	22.18	43.41		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG***	200	-2.44	5.96	33.33	35.14		

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

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

Similar sorghum price changes were observed as in last month. Except for a few markets, sorghum prices have not changed in Mali over the past 1-12 months due to adequate market supplies through regular imports and government intervention programs.[22] In most selected markets, the current sorghum prices are far higher than the past 1, 3, 6, and 12 months in Niger, Nigeria, and Togo. Seasonal declines in supplies, insecurity and armed conflicts and COVID-19 restrictions remained significant drivers of prices in the region. Prices are, however, expected to mainly decline over the next 3-6 months in Mali and Niger due to expected new harvests.

[21] Author's construction based on data from WFP (2021) and FAO (2021)
[22] FAO, 2021. Food Price Monitoring and Analysis Bulletin No. 6.

Table 10: Changes in sorghum prices in selected West African countries[23]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Mali	Sorghum	Ansongo, Retail, XOF/KG	225	12.50	12.50	0.00	-4.26	-5.21	-5.80
Mali	Sorghum	Badalabougou, Retail, XOF/KG	200	0.00	0.00	0.00	3.09	-0.76	-1.02
Mali	Sorghum	Faladié, Retail, XOF/KG	200	0.00	0.00	0.00	0.00	9.07	-3.80
Mali	Sorghum	Gao, Retail, XOF/KG	250	0.00	0.00	0.00	0.00	-4.45	-6.03
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	250	0.00	0.00	11.11	-1.19	-4.96	-6.50
Mali	Sorghum	Niarela, Retail, XOF/KG	200	0.00	0.00	14.29	14.29	-7.04	-6.89
Niger	Sorghum	Abalak, Retail, XOF/KG	322	0.31	1.90	15.83	8.97	2.56	5.99
Niger	Sorghum	Bonkaney, Retail, XOF/KG	288	12.06	12.06	23.61	18.52	-11.00	-2.50
Niger	Sorghum	Goure, Retail, XOF/KG	321	27.38	16.73	37.18	6.29	-11.50	-10.23
Niger	Sorghum	Katako, Retail, XOF/KG	297	15.12	15.12	29.69	18.80	-17.51	-2.48
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG***	223	1.36	1.36	-14.23	65.19		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG***	185	-3.23	0.53	37.60	67.78		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG***	200	0.88	6.23	30.52	75.49		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG***	225	4.28	9.05	1.01	54.07		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG***	175	-1.41	-3.45	-33.54	56.25		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG**	300	7.14	42.86	42.86	23.97		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG**	250	0.00	19.05	58.23	85.19		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG**	310	5.08	14.81	26.53	26.53		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG**	250	0.00	19.05	32.98	85.19		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG**	315	5.00	6.06	5.70	12.50		

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

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

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

Climatic Conditions and Potential Implications for Food and Nutrition Security

The latest ICPAC seasonal rainfall forecast indicates a drier than usual season across the East Africa region, especially in Burundi, southern and south-eastern Ethiopia, the Red Sea coast of northern Eritrea, Kenya, Rwanda, central and north-western Somalia, and Tanzania[24]. The central and southern parts of the region are expected to experience significant rainfall deficits. The expected dry conditions are expected to impact the main cropping season of October to December severely. The combination of drier conditions and other shocks such as the COVID-19 pandemic, persistent conflicts and economic shocks would worsen the food and nutrition security in the affected parts of the region. Improvements in food trade and humanitarian assistance would be critical to address the urgent need for food among the affected populations, who are likely to experience food and nutrition insecurity conditions. Similar to the previous months, no rainfall is expected in the off-season in the Southern Africa region. However, preparations are ongoing in the forthcoming main cropping season. In West Africa, projections continue to show above-normal rainfall, particularly along the coastal areas providing favourable cropping conditions for the main seasons cereals season. Some inland areas around the Sahel region face dry conditions that significantly negatively impact agricultural cropping activities and potential food supplies.

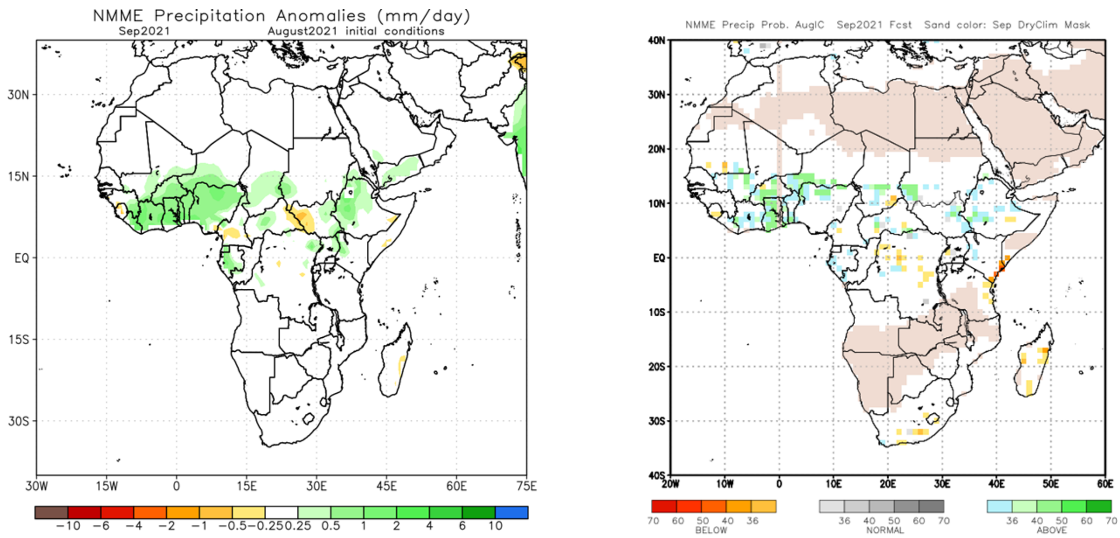


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for September 2021, based on August 2021 initial conditions[25]

[24] https://www.icpac.net/news/drier-and-warmer-season-forecasted-to-continue-across-eastern-africa/. Accessed 27 August 2021

[25] 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 current desert locust upsurge in the Horn of Africa could prolong due to persistent insecurity, especially in the Afar region and adjacent areas in northern Somalia (FAO, 2021[26]). Some more swarms were sighted in the northeast plateau and coast in northwest Somalia. Also, several immature swarms were sighted in the northeast due to migration from northwest Somalia and undetected breeding. The insecurity has hampered ground and aerial access to the breeding locations, negatively affecting control interventions. New immature swarms are expected to form from the end of September going into October.

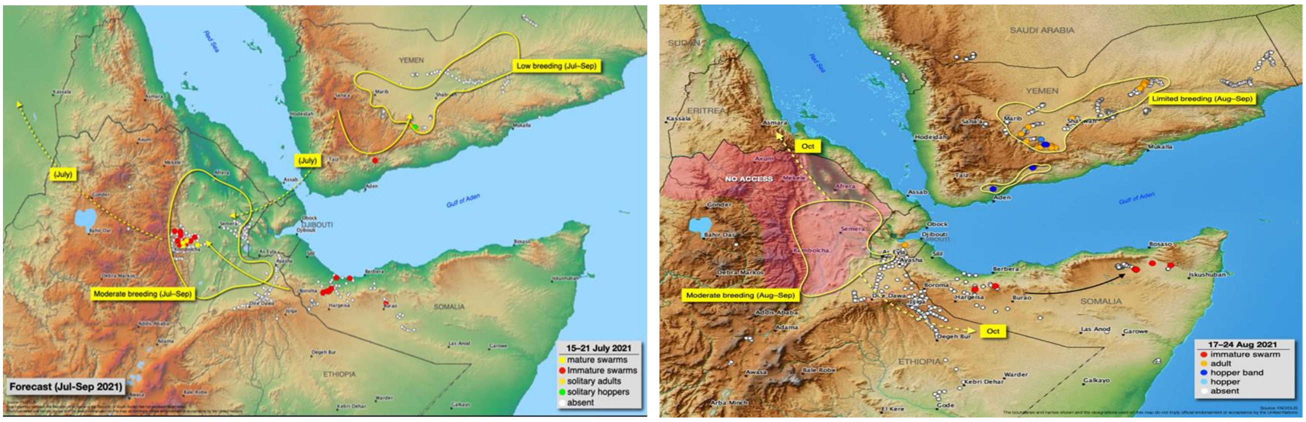
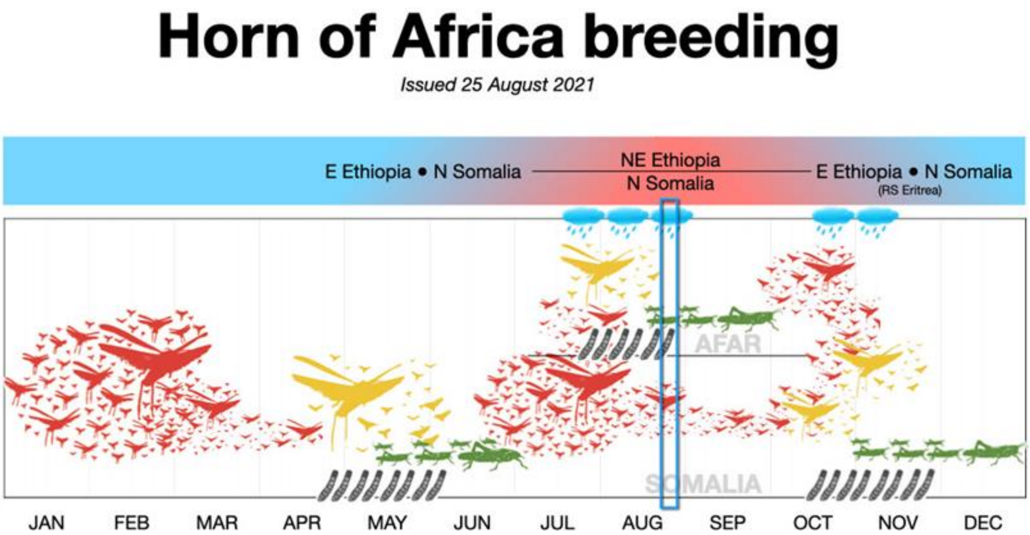


Figure 12: Situation, threat and forecast of desert locust in East Africa[27]



[26] http://www.fao.org/ag/locusts/en/info/info/index.html. Accessed 27 August 2021
[27] http://www.fao.org/ag/locusts/common/ecg/75/en/210722update.jpg. Accessed 28 July 2021 and http://www.fao.org/ag/locusts/common/ecg/75/en/210825update.jpg. Accessed 27 August 2021

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