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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

EDITION 21

January 2022

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 November Food Security Monitor are summarised below.

Food Security Outlook. In January 2022, the four food insecurity hotspots - countries where more than 50% of the total population has insufficient food for consumption – were South Sudan, Burkina Faso, Mali and Niger.

East Africa continued to experience a predominantly IPC Phase 3 (Crisis) food security situation, driven by conflict and political instability, mainly in Ethiopia, South Sudan, and Sudan.

IPC Phase 3 (Crisis) outcomes persisted across most rainfall deficit parts of Southern Africa, while below-average and delayed rainfalls recorded across Malawi, central and northern Mozambique, and north-western Zimbabwe.

In West Africa, most parts continued to experience IPC Phase 1 (minimal) and IPC Phase 2 (stressed) outcomes, which are expected to remain in place until May 2022.

Food Trade. A study by the EAC showed that overall trade for East Africa's six-member states dropped by 6.08 percent to $51.91 billion, from $55.27 billion in 2019, partly due to impacts of the COVID-19 pandemic and the containment measures.

In Southern Africa, Zimbabwe has announced that it is keen to secure joint venture partnerships with Chinese companies to boost agricultural production targeting selected crops.

Meanwhile, in West Africa, ECOWAS sectoral ministers recommended the mutual recognition of PCR tests and the reopening of land borders, which could improve intra-regional trade.

Commodity Prices. Persistent droughts and flooding in parts of the East African region have affected crop outputs and led to price surges in most markets.

In Southern Africa, good harvests during the 2021 harvests seasons continue to provide adequate stocks availability resulting in stable or marginal decline or rise in prices in the region.

In West Africa, prolonged dry spells and flooding in parts of the region have affected cropping and harvests resulting in generally higher food prices.

Climatic conditions. The February rainfall forecast for East Africa indicates wetter than usual conditions in central and north-eastern Tanzania.

This is as parts of Southern Africa are projected to receive above-normal rainfall from February to April 2022, a critical crop-growing period in the region.

The Southern Africa region (Madagascar, Malawi and Mozambique) were devasted by the Tropical Storm Ana, which destroyed livelihoods, infrastructure and agricultural activities, adversely affecting the movement of agricultural inputs and food to areas of need.

Meanwhile, in West Africa, rainfall conditions will remain mainly dry.

Introduction

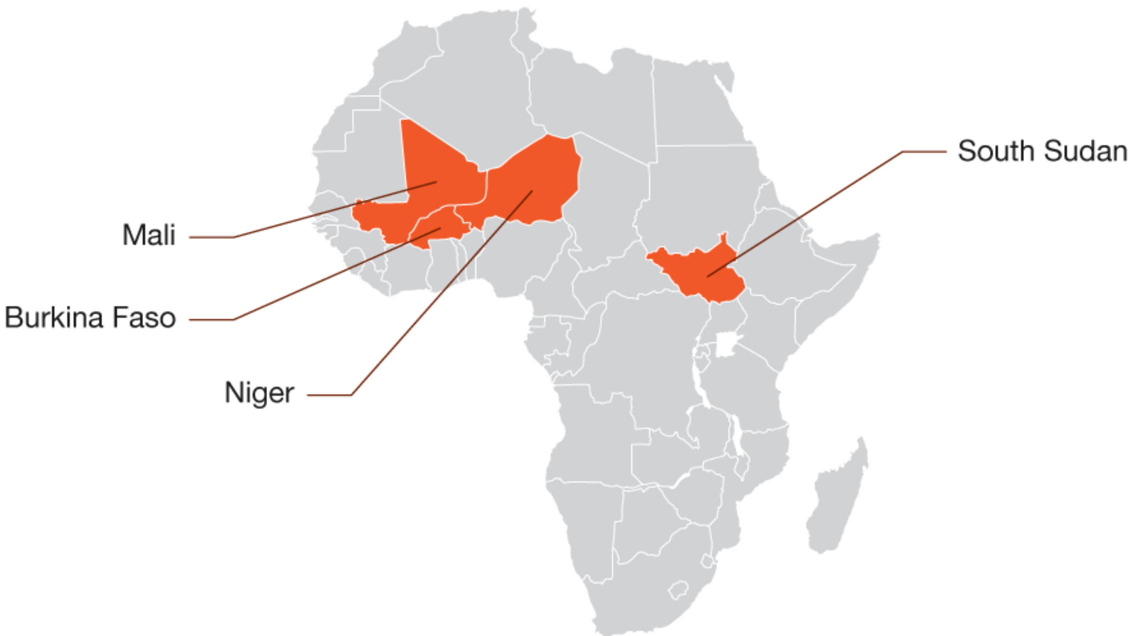
The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade and food and nutrition security. The discussions presented here focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, 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, were four as of January 2022. These hotspot countries include South Sudan (60%), Burkina Faso (58%), Mali (62%) and Niger (58%)[1].

Figure 1: Early warning analysis of acute food insecurity hotspots, January 2022



Source: Own analysis based on data from WFP (2022)[2]

[1] https://hungermap.wfp.org/. Accessed 30 January 2022
[2] https://hungermap.wfp.org/. Accessed 30 January 2022

East Africa Outlook

The East African region continued to experience an IPC Phase 3 (Crisis), driven by conflict and political instability, mainly in Ethiopia, South Sudan, and Sudan. Conflict, weather, and macroeconomic shocks are expected to drive severe food insecurity outcomes across the region[3].

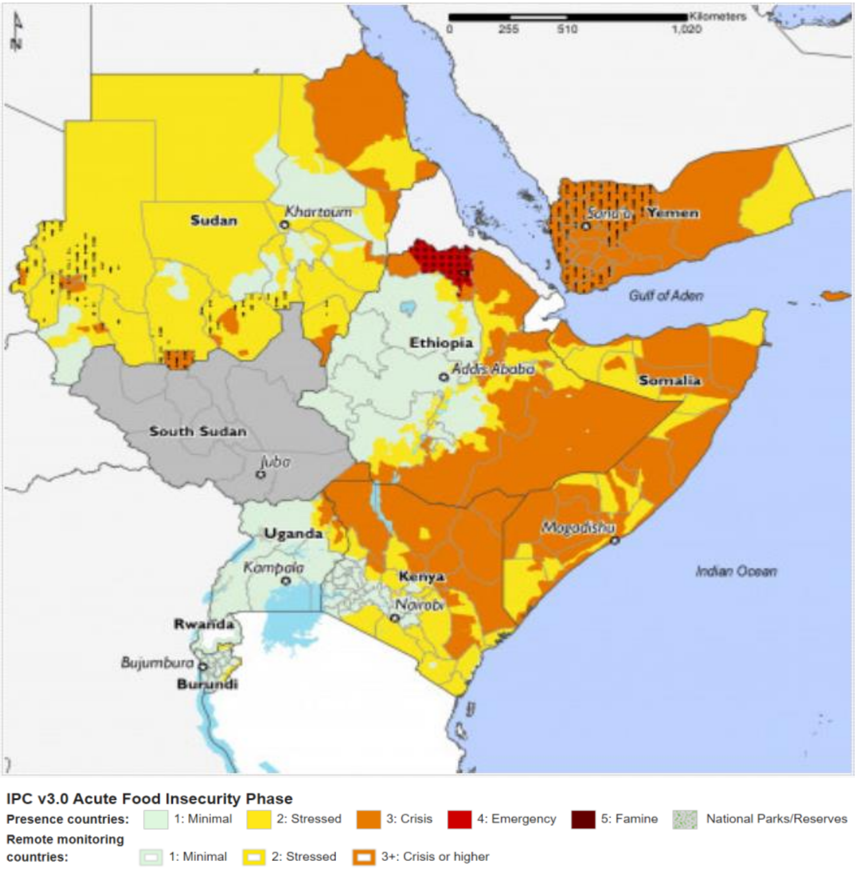


Figure 3: East Africa countries Food Security Outlook, Nov 2021-Jan 2022

Ethiopia: The northern parts of the country continue to face extremely high food insecurity situations as access to harvest and markets remain limited. The ongoing conflict in the Tigray Region is driving IPC Phase 4 (emergency) outcomes as humanitarian efforts remain cut off. According to the World Food Programme (WFP) report on the Food Security Situation in the Tigray region, 83 percent of people are food insecure[4].

Kenya: The country continued to experience a predominantly IPC Phase 3 (crisis) situation driven by the droughts that affected livestock and delayed the start of the agricultural season[5]. Failure of the October to December short rains have seen the country experience its third consecutive below-average season across most pastoral and marginal areas of the country[6]. The Food Security and Nutrition Working Group also reports that high food prices and impacts of the COVID-19 pandemic still affect households' ability to purchase food for consumption. As a result, humanitarian efforts are highly likely to be required to prevent the situation from worsening.

South Sudan: The country is facing floods for the third consecutive year, which have seen fields submerged in water, leading to harvest losses and livestock deaths[7]. This has worsened the country's food security situation, which was already constrained by ongoing conflicts.

Rwanda: The country continued to experience an IPC Phase 1 (minimal) food security situation sustained by increased food access from the inter-seasonal harvests of cassava and bananas. Suspension of COVID-19 measures has also led to the resumption of business, and an improvement in income-generating activities, contributing to improved food security outcomes[8].

Tanzania: Drought and its resultant poor harvests have disrupted the country's maize supply, pushing maize prices up. As of December 2021, the Ministry of Agriculture reported that the prices for maize grains are

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[3] https://fews.net/east-africa Accessed 30 January 2022
[4] https://reliefweb.int/report/ethiopia/emergency-food-security-assessment-tigray-region-ethiopia-january-2022 Accessed 30 January 2022
[5] https://fews.net/east-africa/kenya Accessed 30 January 2022
[6] https://reliefweb.int/report/kenya/kenya-food-security-alert-historic-20212022-drought-kenya-drive-high-assistance-needs Accessed 30 January 2022
[77] https://reliefweb.int/report/south-sudan/south-sudan-floods-operations-update-n-1-mdrss010-24-january-2022 Accessed 30 January 2022
[8] https://fews.net/east-africa/rwanda Accessed 30 January 2022

fluctuating and that cereal is fetching different prices at different local markets across the country[9]. The prolonged drought that has lasted for four months has affected crop growth and reduced the availability of water and pasture for livestock[10].

Uganda: Poor harvests due to below-average October to December rains have seen the country experience a second below-average season. However, in the Central and Western Regions, production is projected to be better and will see most low-income households experience IPC Phase 1 (minimal) and IPC Phase 2 (stressed) outcomes. In other parts of the country, namely Karamoja, imports from neighbouring countries are expected to ease the food supply[11].

Prevalence of Insufficient Food Consumption in East Africa

As of 30 January 2022, 50.0 million people across six selected East African countries did not have sufficient food for consumption. This is a 3.7 percent decrease from the last reporting month (November 2021), indicating that the food security situation improved across these focus countries during the period. Ethiopia (-7.1%) and Kenya (-13.92%) recorded a moderate decrease in the number of people with insufficient food for consumption, while South Sudan (-1.5%) recorded a low decrease during the reporting period. On the other hand, Tanzania (7.5%) recorded a moderate increase in the number of people with insufficient food for consumption, while Uganda (1.44%) recorded a low increase. In Rwanda, the situation did not change from the previous reporting period.

Table 1: Prevalence of insufficient food consumption across selected East African countries (Jan 2022)[12]

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	15.70	14.38	-7.10	7.20	36.80
Kenya	51.40	7.90	6.80	13.23	-13.92	4.20	26.20
Rwanda	12.30	2.50	2.50	20.33	0.00	2.30	38.30
South Sudan	11.00	6.70	6.60	60.00	-1.49	22.70	31.30
Tanzania	56.30	4.00	4.30	7.64	7.50	3.50	31.80
Uganda	42.70	13.90	14.10	33.02	1.44	3.50	28.90

**Previous month and ** Current month*

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

[9] https://www.theeastafrican.co.ke/tea/business/drought-hits-maize-supply-prices-in-dar-3687278 Accessed 30 January 2022
[10] https://reliefweb.int/report/united-republic-tanzania/tanzania-food-insecurity-drought-emergency-plan-action-epoa-dref Accessed 31 January 2022
[11] https://reliefweb.int/report/uganda/uganda-food-security-outlook-update-increasing-number-refugees-and-poor-households Accessed 31 January 2022
[12] https://hungermap.wfp.org/ on Accessed 30 January 2022

Southern Africa Outlook

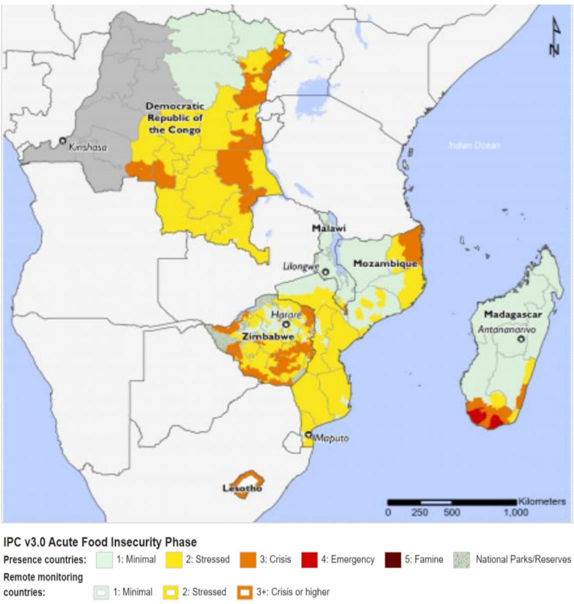

Figure 3: Southern Africa countries Food Security Outlook, October 2021- January 2022

IPC Phase 3 (Crisis) outcomes persisted across most rainfall deficit parts of the region while below-average and delayed rainfalls recorded across Malawi, central and northern Mozambique, and north-western Zimbabwe resulted in delays in planting activities, which may see the region record below-average harvests. The region was recently hit by the tropical storm Cyclone Ana, which made landfall on the 24th of January, reaching Mozambique, Malawi, Zambia, and Zimbabwe. The cyclone has resulted in heavy rainfall and strong wind, causing rivers to overflow, floods, and landslides which have damaged infrastructure, displaced people, and caused deaths. This has created an urgent need for humanitarian assistance to help avert a food security situation across the region.

Malawi: Drought conditions experienced at the beginning of the season will likely lead to high food insecurity outcomes in the country. The impacts of Cyclone Ana are also projected to drive food insecurity outcomes by affecting crops in southern parts of the country.

Mozambique: The country experienced delays in the onset of the rainfall, and above-average temperatures, likely resulting in below-average harvests[13]. The country has also been affected by the Tropical Storm Ana, mainly in the provinces of Zambezia, Nampula, and Tete, and, to a lesser extent, Niassa, Sofala, and Cabo Delgado[14].

Zambia: The country has a lower prevalence of food insecurity, with an estimated 1.58 million people projected to face an IPC Phase 3 (Crisis) outcome until March 2022. The late-onset and reduced rainfall in the eastern parts of the country are projected to dampen the 2021/22 season's production prospects. However, cereal supplies in the country are estimated to exceed the five-year average, with maize stocks set to increase to more than 600,000 tonnes[15].

Zimbabwe: The country's food security situation continued to deteriorate due to constrained household food availability and access as most households had depleted food stocks and limited livelihood options. As of December 2021, an estimated 5.9 million people were reported to be food insecure[16]. Commodity prices in the local currency continued to increase, further limiting access among households with limited income-generating activities.

Prevalence of Insufficient Food Consumption in Southern Africa

As of 30 January 2022, the number of people with insufficient food for consumption across the selected focus countries in Southern Africa stood at 16.5 million. This represents a 0.15 percent decrease from the last reporting period (November 2021), indicating that the region's food security situation improved over the reporting period. Malawi (21.1%) and Zambia (20%) recorded a high increase in the number of people with insufficient food for consumption, while Mozambique (-28.7%) and Zimbabwe (-15%) recorded a high decrease during the reporting period.

[13] https://fews.net/southern-africa/mozambique Accessed 30 January 2022
[14] https://reliefweb.int/report/mozambique/mozambique-tropical-storm-ana-flash-update-no5-28-january-2022 Accessed 30 January 2022
[15] https://reliefweb.int/sites/reliefweb.int/files/resources/ZMB_23.pdf Accessed 30 January 2022
[16] https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-and-markets-monitoring-report-december-2021 Accessed 30 January 2022

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (Jan 2022)[17]

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	1.90	2.30	12.71	21.05	1.30	39.00
Mozambique	29.50	9.40	6.70	22.71	-28.72	4.40	42.30
Zambia	17.40	2.00	2.40	13.79	20.00	4.20	34.60
Zimbabwe	14.40	6.00	5.10	35.42	-15.00	2.90	23.50

**Previous month and ** Current month*

= 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 Outlook

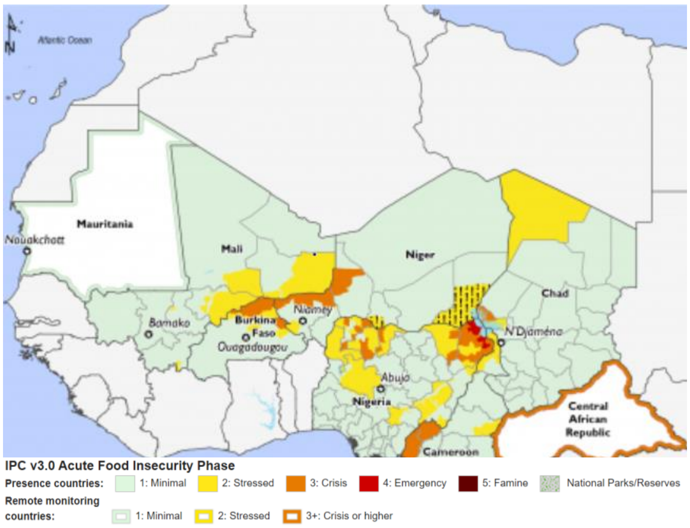

Figure 3: Southern Africa countries Food Security Outlook, October 2021- January 2022

Most parts of the region continued to experience IPC Phase 1 (minimal) and IPC Phase 2 (stressed) outcomes) with these outcomes expected to remain in place until May 2022. According to the Permanent Interstate Committee for Drought Control in the Sahel (CILSS), the region's food security monitoring system, cereal production for the 2021/22 season is expected to drop by 1.8 percent from the previous year due to the prolonged dry spells experienced in Niger, Mauritania, Burkina Faso, Mali, and Chad[18].

Prevalence of Insufficient Food Consumption in West Africa

The number of people with insufficient food for consumption across seven selected countries in West Africa was 105.7 million as of 30 January 2022. This was a 0.9 percent decrease from November 2021, suggesting that the region's food security situation improved over the reporting period. During this period, Burkina Faso (6.48%), Mali (9.17%), and Niger (13.91%) recorded moderate increases in the number of people with insufficient food for consumption. Ghana (-5.26%) and Nigeria (-6.48%) recorded a moderate decrease, while Cote d'Ivoire (-1.82%) recorded a low decrease. In Togo, the situation remains unchanged over the period.

[17] https://hungermap.wfp.org/ Accessed 30 January 2022
[18] https://fews.net/west-africa Accessed 30 January 2022

Table 3: Prevalence of insufficient food consumption in selected West African countries (January 2022)[19]

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	10.80	11.50	58.08	6.48	↑	8.40	24.90
Cote d'Ivoire	25.10	5.50	5.40	21.51	-1.82	↘	6.10	21.60
Ghana	29.80	5.70	5.40	18.12	-5.26	↓	6.80	17.50
Mali	19.10	10.90	11.90	62.30	9.17	↑	9.00	26.90
Niger	22.40	11.50	13.10	58.48	13.91	↑	14.10	48.50
Nigeria	202.80	60.20	56.30	27.76	-6.48	↓	6.80	36.80
Togo	7.90	2.10	2.10	26.58	0.00	●	5.70	23.80

**Previous month and ** Current month*

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

Food Trade Updates

Continental Food Trade Updates

- The African Organisation for Standardisation (ARSO), and the African Continental Free Trade Area Secretariat, have signed a Memorandum of Understanding (MoU) on implementing the AfCFTA agreement. The agreement focuses on eliminating the Technical Barriers to Trade (TBTs), which have restricted intra-African trade and regional integration efforts[20].
- The OPEC Fund for International Development (OFID) has signed a US$80 million loan agreement with the African Export-Import Bank (Afreximbank) to finance international trade. The fund seeks to boost Afreximbank's liquidity and grow its portfolio to finance exports and imports in critical sectors such as agriculture, manufacturing, and healthcare[21].
- Afreximbank held a Trade Finance Seminar on the 10th of December, which sought to increase Africa's trade finance capacity, knowledge, and innovation. During the seminar, the bank highlighted that the USD82 billion trade finance gap is a significant non-tariff barrier to trade and can limit the full trade potential of the AfCFTA[22].
- A recent study by the UN, which reviewed the AfCFTA one year after its implementation, reports that a key shortcoming of the continental agreement is that many nutrition-sensitive goods may not be fully liberalised or progressively liberalised over longer periods. The protected goods include live animals, meat, fish, milk and dairy products, fruit and vegetables, coffee, tea, spices, oilseeds, and sugars[23]

[19] https://hungermap.wfp.org/ Accessed 30 January 2022
[20] https://www.ghanaweb.com/GhanaHomePage/business/AfCFTA-Secretariat-signs-MoU-with-ARSO-to-drive-ambitious-free-trade-agreement-1412155 Accessed 30 January 2022
[21] http://wam.ae/en/details/1395302999769 Accessed 30 January 2022
[22] https://www.afreximbank.com/afreximbank-trade-finance-seminar-seeks-to-boost-africas-trade-finance-capacity-knowledge-and-innovation/ Accessed 30 January 2022
[23] https://www.un.org/africarenewal/magazine/january-2022/one-year-afcfta-what-has-worked-and-way-forward Accessed 30 January 2022

East Africa

A recent study by the East Africa Community reports that member states of the regional bloc have lost an estimated USD3.36 billion worth of trade during the last year due to the COVID-19 pandemic, which cut global trade links and pushed regional economies into total lockdown. The study also shows that overall trade for the six-member states, namely Rwanda, Uganda, Tanzania, Burundi, Kenya, and South Sudan - dropped by 6.08 percent to $51.91 billion, from $55.27 billion in 2019[24].

Figure 5 below provides an update of the various events and activities recorded across different countries in East Africa over the past month, which have impacted food trade in the region between Dec 2021 and Jan 2022.

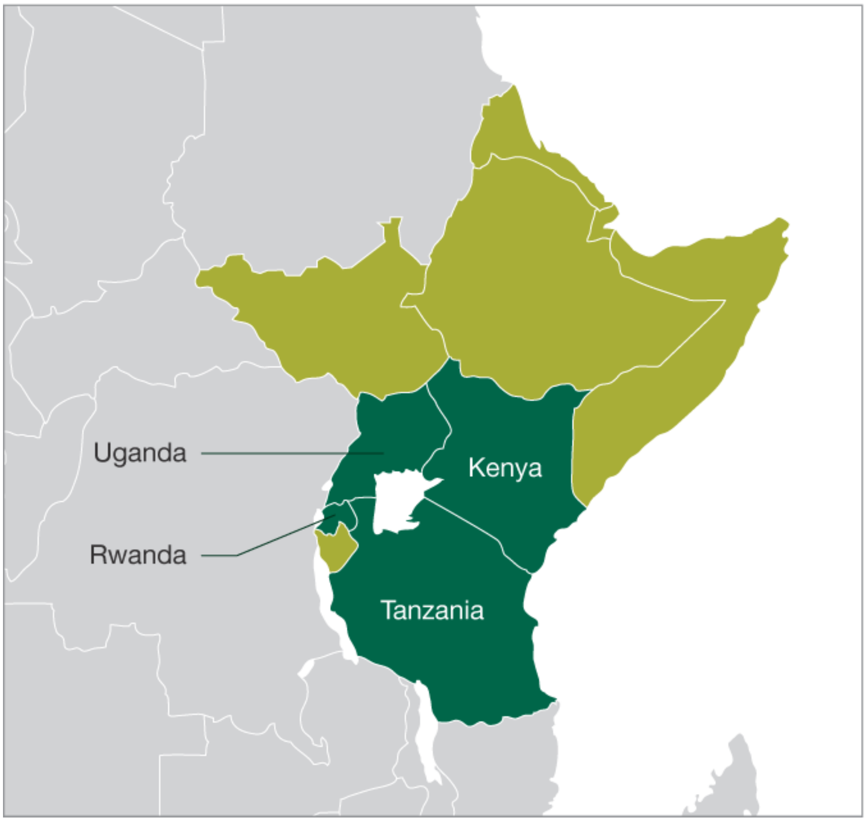

Figure 5: East Africa Cross border trade updates Dec 2021-Jan 2022[25]

[24] https://www.thecitizen.co.tz/tanzania/news/business/eac-loses-3b-to-covid-19-measures-as-trade-declines-3688266 Accessed 30 January 2022

[25] https://www.businessdailyafrica.com/bd/news/counties/farmers-fight-duty-free-sugar-imports-comesa-quota-3635392 Accessed 30 January 2022
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https://www.businessdailyafrica.com/bd/markets/commodities/kenya-extends-avocado-export-ban-indefinitely-3692584 Accessed 30 January 2022
https://www.theeastafrican.co.ke/tea/business/higher-import-duty-killing-sector-decry-kenyan-juice-makers-3695822 Accessed 30 January 2022
https://www.newtimes.co.rw/news/rwanda-dr-congo-commit-boost-trade-through-transportation Accessed 30 January 2022
https://dailynews.co.tz/news/2021-12-1161b4980dd4e0b.aspx Accessed 30 January 2022
https://www.thecitizen.co.tz/tanzania/news/business/dar-s-eac-trade-surplus-485m-less-half-sadc-volumes-3677302 Accessed 30 January 2022
https://dailynews.co.tz/news/2022-01-1861e5dbd8b17a7.aspx Accessed 30 January 2022
https://www.businessdailyafrica.com/bd/corporate/shipping-logistics/sh144bn-coast-roads-bolster-kenya-tz-trade-3686216 Accessed 30 January 2022
https://www.reuters.com/world/africa/uganda-launches-road-building-congo-boost-trade-2021-12-05/ Accessed 30 January 2022
https://www.theeastafrican.co.ke/tea/business/uganda-considers-banning-kenya-products-3652490 Accessed 30 January 2022
https://www.businessdailyafrica.com/bd/news/east-africa/uganda/uganda-mulls-banning-kenyan-farm-products-3652724
https://www.eac.int/press-releases/157-trade/2324-uganda-commits-to-conduct-free-covid-19-test-to-ease-busia-malaba-trucks-traffic-snarl-ups Accessed 30 January 2022
https://www.theeastafrican.co.ke/tea/business/uganda-tanzania-resume-talks-over-non-tariff-barriers-3688438 Accessed 30 January 2022
https://www.theeastafrican.co.ke/tea/business/uganda-epz-earnings-hit-record-1-b-3690336https://www.the-star.co.ke/news/africa/2022-01-26-ugandas-president-seeks-to-boost-trade-rein-in-borrowing/ Accessed 30 January 2022

RWANDA

- The Minister of Infrastructure, Ambassador Claver Gatete and his DRC counterpart, Cherubin Okende Senga held a bilateral exchange on the development of air, road and railway infrastructure projects on the 1st of December.
- The meeting, which aimed to bolster regional trade services, was held on the side-lines of the 33rd plenary session of the African Civil Aviation Commission meeting, currently underway in Kigali.

UGANDA

- Uganda has announced that it will be launching a road building project in the DRC in order to boost trade between the two countries.
- Uganda announced that it is considering restricting importing Kenya's raw and processed agricultural products as trade relations between the two countries remain constrained following Kenya's ban on sugar and milk imports from Uganda. To this end, the Ugandan cabinet agreed to a proposal that will restrict Kenya's products in the Ugandan market.
- Uganda has announced that it will be scrapping rapid COVID-19 tests at the Kenya-Uganda border points of Busia and Malaba for (seven (7) days to clear the truck traffic. As of 11 January 2022, a total of 4,500, trucks have stalled at the two border posts due to the mandatory COVID test requirements.
- Uganda and Tanzania have resumed talks aimed at eliminating trade barriers. Uganda's trade volumes have been affected by the non-tariff barriers imposed by Tanzania. These include restrictions on exports such as sugar, milk, and limitation of movement for Ugandan trucks.
- In an effort to reduce its borrowing, notably with China, the Ugandan government is planning to boost exports in sectors such as meat and dairy.

TANZANIA

- Tanzania and Kenya signed six Memorandums of Understanding (MoUs) and one contract aiming at further strengthening their existing bilateral ties and improving the two economies. The MOUs cover a number of sectors, and include control of livestock diseases in the border areas.
- Recently published statistics by the Tanzania Central Bank show that Tanzania's trade surplus across the East African Community region rose to $484.5 million in 2020, from $343.8 million the previous year. The country also reported a highly improved trade surplus of $1.09 billion with Southern Africa Development Community (SADC) countries, indicating a further expansion of its sub-Saharan trade network.
- Tanzania has officially submitted the instruments of ratification of the African Continental Free Trade Area (AfCFTA) agreement to the African Union Commission (AUC).

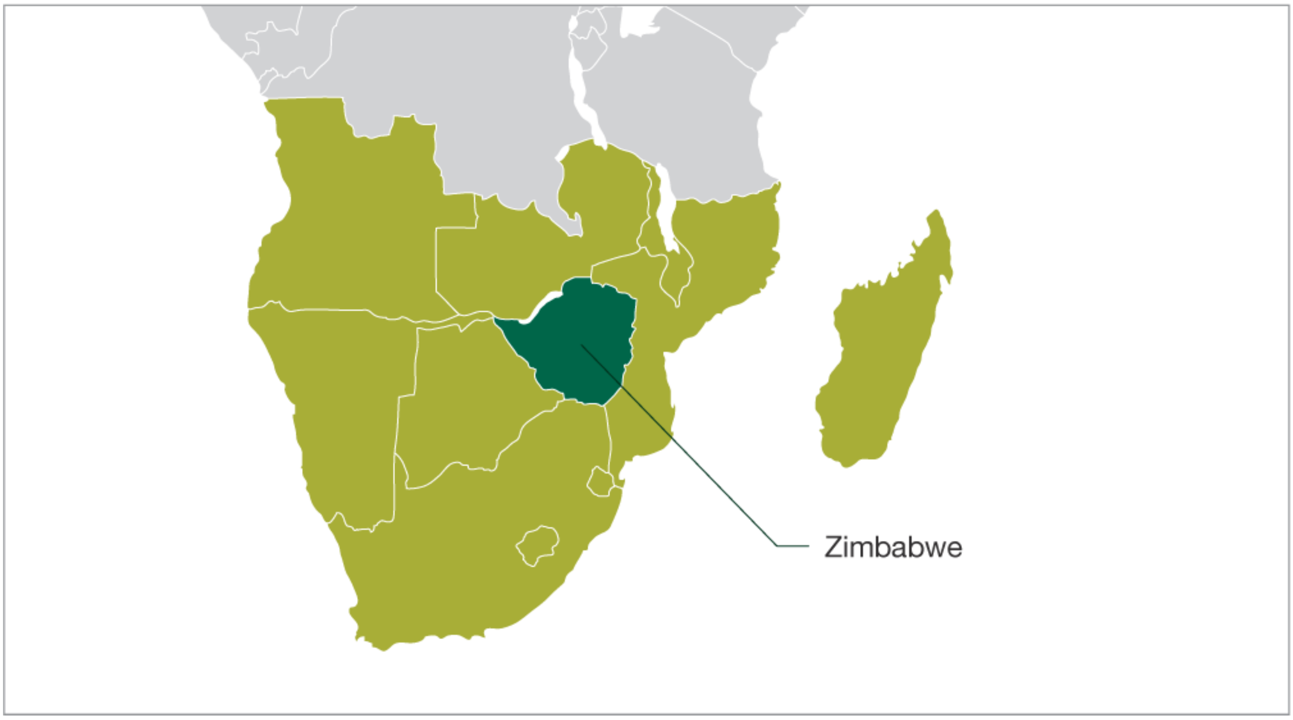
KENYA

- Latest statistics published by the Kenya National Bureau of Statistics show that Kenya's food import bill rose by 21 percent to Sh155.42 billion from Sh128.06 billion in 2020. The data shows that imports of food products drove the increase as industries sourced more for value-addition before selling in the local market.
- Kenya's exports to Ethiopia have more than doubled, rising by 68 percent in the third quarter of 2021 according to recent statistics released by the KNBS. This increase has been attributed to increased demand for food exports in the country, which has been hit by a political crisis over the war between government forces and the rebel Tigray People's Liberation Army (TPLF).
- The Kenyan Sugar Directorate reported that Kenyan sugar traders have defied the duty-free sugar import quota for sugar imported from COMESA member states, importing more than the prescribed amounts. As a result of this breach, the KRA reported that it will be charging a 100 percent duty on sugar imports, a move that will increase sugar prices.
- Egypt has announced plans to import more fruit and other food products from Kenya in a move that is set to improve Kenya's trade balance with the country. Kenya has also indicated that to bridge the trade deficit with Egypt, it's also planning to export value added agricultural products beyond tea and tobacco which dominated exports to Egypt.
- The horticulture regulator in Kenya has indefinitely extended the ban on avocado export as a means to reduce the premature harvesting of the crop.
- Fruit juice manufacturers have rejected the Kenya Revenue Authority's (KRA's) decision to increase import duty on products used in the manufacture of ready-to-drink juices from 10 percent to 25 percent, which they argue will lead to consumers footing these extra costs.

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 Dec 2021 - Jan 2022[26]



ZIMBABWE

- Zimbabwe has secured Euro 98,000 worth of equipment, training and technical interventions from COMESA. The support is meant to help the country improve the statistics that assist the Zimbabwean business community to develop, promote and facilitate exportation of their goods and services to the world.
- According to the Zimbabwe National Statistical Agency (Zi Stat), Zimbabwe has managed to significantly cut its trade deficit towards the end of 2021 after it registered an increase in the value of its exports and a decrease in the value of its imports. The major contributors to the rise in exports were food and beverages, and transport equipment, which were valued at USD19.7 million and USD2.84 million, respectively.
- Zimbabwe has announced that it is keen to secure joint venture partnerships with Chinese companies aimed at boosting agricultural production targeting selected crops, which will be processed locally and exported to China.

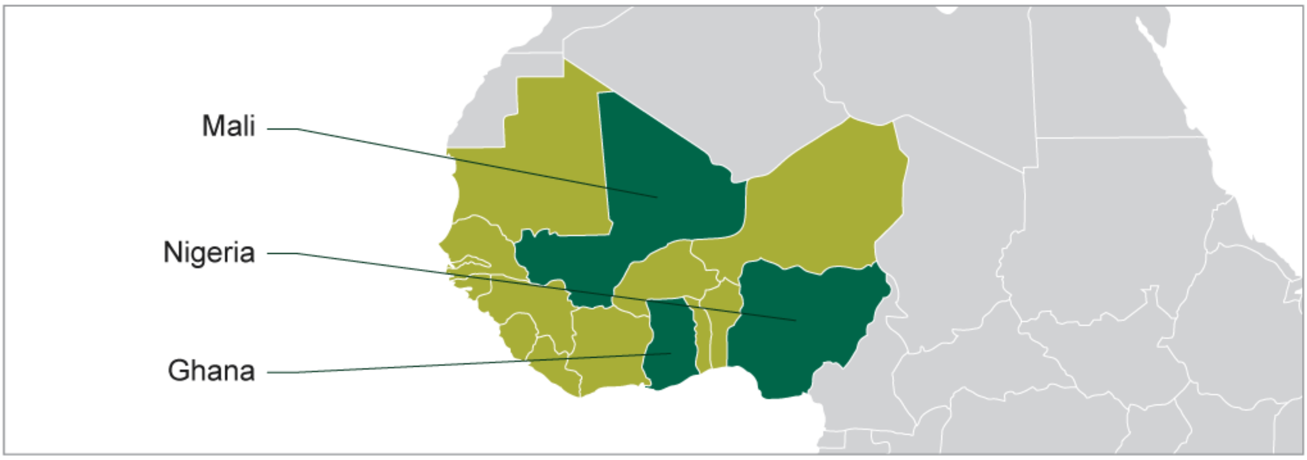
[26] https://www.chronicle.co.zw/zim-targets-value-added-agric-exports-to-china/ Accessed 30 January 2022
https://www.comesa.int/zim-trade-receives-e98-000-worth-of-equipment-and-technical-support/ Accessed 30 January 2022
https://africa.cgtn.com/2022/01/12/zimbabwe-slashes-trade-deficit-as-exports-rise-by-20-percent/ Accessed 30 January 2022

West Africa

In a move that could see increased intra-regional trade, going forward, sectoral ministers of the Economic Community of West African States (ECOWAS) covering the interior, health, finance, trade and transport ministries, and other experts recommended the mutual recognition of Polymerase Chain Reaction (PCR) tests and the reopening of land borders from 1 January 2022[27].

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

Figure 7: West Africa Cross Border Trade Updates Dec 2021 - Jan 2022[28]



NIGERIA

- Nigeria has ratified its membership of the African free-trade zone due to be launched in January.
- The African Development Bank has provided Nigeria with a $210 million for Special Agro-Industrial Processing Zones. This programme is expected to help to unlock Nigeria's agriculture sector potential and promote industrialization through the development of strategic crops and livestock.

MALI

- Mali has indefinitely suspended all grain exports as it seeks to protect the country's food supply amid worsening hunger situation in the country.
- Mali is a major grain exporter to neighbouring countries supplying between 10-15 percent of its total production.

GHANA

- The Ministry of Trade and Industry has urged member states of the African Continental Free Trade Area Agreement (AfCFTA) to prioritize the promotion of the development of both Special Economic Zones and the operationalization of the AfCFTA.
- The Ghana Free Zones Authority (GFZA) and the Ministry of Trade and Industry are in the process of developing three separate industrial cities in the country to boost the government's industrialisation agenda.
- The government has appointed the former Minister of Tourism, Arts and Culture, Catherine Ablema Afeku, to lead the strategic communication of the National Coordination Office of the Africa Continental Free Trade Area. In this role, she will look to ensure that Ghanaian entrepreneurs have the information they need to benefit from trade deals under AfCFTA.
- The Ghana Export Promotions Authority released statistics showing that the country's revenue from non-traditional export earnings remained strong in 2020, amounting to $2.846 billion, despite the disruptive effects of the COVID-19 pandemic on the supply chain.

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[27] https://guardian.ng/news/ecowas-ministers-propose-reopening-of-land-borders-next-month/ Accessed 30 January 2022
[28] https://www.graphic.com.gh/business/business-news/ghana-news-free-zones-authority-to-build-3-industrial-cities.html Accessed 30 January 2022
https://www.ghanaweb.com/GhanaHomePage/business/We-ll-help-small-businesses-to-understand-AFCFTA-Catherine-Afeku-1418989 Accessed 30 January 2022
https://www.ghanabusinessnews.com/2021/12/09/ghana-non-traditional-export-earnings-remain-strong-despite-covid-19-challenges-in-2020/ Accessed 30 January 2022
https://www.world-grain.com/articles/16205-mali-suspends-exports-to-protect-food-supply Accessed 30 January 2022
https://www.reuters.com/article/africa-trade-nigeria-idINL1N2HY20R Accessed 30 January 2022
https://www.afdb.org/en/news-and-events/press-releases/african-development-bank-loans-nigeria-210-million-special-agro-industrial-processing-zones-47930 Accessed 30 January 2022

Agricultural Commodities Price Monitoring

Overview of Global Prices

In 2021, global food prices were at a 10-year record-high, soaring by 28% from 2020.[29] Data and evidence from the Agriculture Market Information System (AMIS)[30] show that global maize and wheat prices helped drive this surge. The IGC sub-index rose on a month-on-month and year-on-year basis mainly due to high global demand and the tightening of supplies. Over the last month, soybean and rice prices have declined due to depressed demands with expected new harvests.

Grains and Oilseeds Index (GOI)	Nov 2021 Average*	% Change	
		M/M	Y/Y
GOI	284	+1.2	+16.0
Wheat	303	+5.0	+43.1
Maize	279	+0.9	+16.0
Rice	166	-1.0	-10.8
Soybeans	260	-1.3	+4.3

*Jan 2000=100, derived from export quotations

Figure 7: Global Commodity Prices, January 2022[31]

East Africa

Key drivers of commodity prices in EA[32]

Weather shocks

Persistent droughts and flooding in parts of the East African region have affected crop outputs and led to price surges in most markets. Generally, these shocks are predicted to sustain higher prices through to mid-2022. However, in some countries such as Uganda and Rwanda, short rain harvests have lessened pressure on prices.

Conflicts and Insecurity

Conflicts and insecurity in parts of Ethiopia and South Sudan have disrupted agricultural production and trading activities, causing the shortfall of commodities.

Maize prices in selected markets in South Sudan are lower than they were 1-12 months ago, except in Juba, where the current price is 2.92% higher than the previous month. Similarly, in Uganda, maize prices are lower than in the past 1-3 months but still higher than their levels in the past 6-12 months. The drop in prices is due to the short rain new harvests in December 2021. On the other hand, maize prices in Tanzania, between TZS54,000-TZS61,800/kg, are higher than in the past 1-12 months. In general, droughts and poor harvests are

[29] https://www.fao.org/worldfoodsituation/foodpricesindex/en/. Accessed on 28 January 2022
[30] http://www.amis-outlook.org/index.php?id=48513. Accessed on 28 January 2022
[31] http://www.amis-outlook.org/index.php?id=48513. Accessed on 28 January 2022
[32] FEWSNET, 2022. https://fews.net/east-africa. Accessed 27 January 2022

dictating higher prices in Tanzania.[33] Rwanda has also experienced a surge in prices over the past 1-6 months. Although the rate of increase over the past one month is low-to-moderate (1-14.6%), it ranges between 32% and 97% over the past 3 and 6 months. On the contrary, however, these prices are lower than 12 months ago levels.

The data generally shows a rising trend in selected markets in Kenya but not as much as is being reported elsewhere.[34] For instance, the current maize price of KES25/kg in Eldoret is lower than in the past 1-6 months but 3% higher than it was12 months ago. In Nairobi, the current maize price of KES33/kg is about 2% higher than its previous month's but 2% lower than it was 3 months ago. Also, in Nakuru, maize prices have increased slightly and are moderately higher than in the past 1-12 months. Generally, a mix of factors is responsible for the state of prices in Kenya. One, droughts and sustained demand have placed upward pressure on prices. The Kenyan government intervention in allowing the import of yellow maize[35] and humanitarian assistance has lessened the pressure on white maize prices. In Ethiopia, although maize prices are still higher than they were in the past 1-12 months, their rate of increase has slowed down to less than 2% in the past 1-3 months. Ethiopia continues to experience conflicts and weather-related shocks affecting production and trade, resulting in higher than previous price levels.

In the next 3-6 months, maize prices are expected to drastically decrease in Rwanda and Tanzania compared to the current prices, as the impact of the new harvests takes effect.

Table 1: Changes in maize prices in selected East African Countries[36]

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	23	0.09	-8.61	52.34	101.25		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG	24	0.42	1.90	69.72	77.21		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG**	25	-13.18	-14.17	-7.64	3.11		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG**	33	1.99	-2.03	0.34	-2.67		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG****	30	0.20	7.64	8.18	4.40		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG	398	14.63	40.59	97.93	5.06	-26.67	-50.25
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	395	9.22	58.00	58.00	-7.06	-20.16	-28.30
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	334	1.26	32.78	72.84	-2.20	-19.65	-50.59
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	320	1.05	54.84	64.77	0.00	-19.78	-45.33
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	140	-24.46	63.67	-32.27	-47.87		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	363	2.92	-1.78	-3.21	-15.29		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	267	-16.70	-42.87	-60.30	-34.89		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	143	-4.76	-28.57	-31.03	-28.57		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	248	-10.34	-2.47	-15.42	-25.71		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	60,167	22.68	27.29	32.10	14.73	-35.15	-37.50
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	54,667	15.39	29.80	5.31	-4.00	-41.41	-38.83
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	61,833	27.22	33.24	68.63	12.55	-39.08	-28.97
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	57,211	22.90	42.17	25.97	0.23	-32.17	-27.69
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	60,000	3.45	10.94	4.46	-7.69	-8.27	-15.41
Uganda	Maize (white)	Kabale, Wholesale, USh/KG*	865	-27.51	-17.75	2.36	44.44		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG*	822	-29.70	-21.79	1.13	23.60		
Uganda	Maize (white)	Lira, Wholesale, USh/KG*	885	-8.56	-4.89	17.04	50.57		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG*	762	-22.79	-18.15	1.45	46.42		

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

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

Bean prices had largely declined against their previous levels in the past 1-12 months in selected markets in Rwanda and Uganda, except in Nyabiheke and Lira over a month ago (Table 2). In Tanzania, beans prices were lower than their one-year level in all selected markets but higher than the past 1-6 months in all other selected markets except in Kigoma. However, forecasts for the next 3-6 months show a reversed picture.

[33] AGC RATIN grain sector news- Thursday, January 20th, 2022
[34] Business Daily: https://www.businessdailyafrica.com/bd/markets/commodities/maize-flour-price-rises-on-grain-cost-3691486
[35] Based on EAGC standards project quarterly report
[36] Author's construction based on data from WFP (2021) and FAO (2021)

Rwanda will experience generally higher prices than currently, while Tanzania, except Kigoma, will experience lower prices than now. Available stocks from the previous harvests have sustained lower beans prices over the period.

Table 2: Changes in bean prices in selected East African Countries[37]

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	221	-20.16	-37.54	-31.60	-60.67	-1.17	8.21
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	330	-14.20	-29.23	-22.29	-42.56	36.64	21.84
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	262	-18.19	-28.72	-23.75	-41.06	5.92	18.57
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	335	18.24	-36.19	-8.30	-52.71	21.28	15.56
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	156,667	2.04	0.08	2.43	-15.06	-12.15	-11.81
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	208,458	4.77	12.99	0.99	-6.67	-2.25	-3.02
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	118,333	-9.92	-12.60	-0.47	-30.90	19.78	38.54
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	191,250	3.38	5.98	2.00	-9.20	-4.00	-0.78
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	185,000	2.30	20.65	-6.53	-8.64	-0.36	-3.82
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG*	1,496	-0.48	-11.66	-19.50	-40.70		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG*	1,498	2.69	-7.33	-4.96	-22.17		

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

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

Sorghum prices have generally been on the rise in selected markets of Ethiopia and Rwanda (Table 3). In Ethiopia, current red sorghum prices are higher compared to the past 1-12 months. Also, white sorghum prices are higher than in the past 6-12 months but lower than their levels in 1-3 months. In Rwanda, sorghum prices declined about 3.6% in Kabuga, remained stable in Kigeme, but increased in all other selected markets over the previous month. Similarly, Mugera and Nyabiheke (Camp) have experienced lower prices, while the rest have had higher prices over the last year. Compared to the past 3-6 months, current sorghum prices are higher in all selected markets in Rwanda. South Sudan has generally experienced lower sorghum prices, particularly over the past 6-12 months. Aweil and Wau have, however, seen higher prices currently than in the past 1-3 months.

Table 3: Changes in sorghum prices in selected East African Countries[38]

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	27	17.58	8.65	60.37	95.26		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG	32	-7.63	-15.15	29.25	41.47		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG	488	-3.68	17.59	12.70	2.74	-6.18	-12.86
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	550	0.00	10.00	22.22	14.09	-7.40	2.60
Rwanda	Sorghum	Mugera, Retail, RWF/KG	450	8.43	7.14	25.00	-6.25	17.95	-7.10
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	450	12.50	20.00	32.35	-6.25	-25.74	-16.40
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	100	12.90	37.25	-44.71	-55.58		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	373	4.41	-1.36	-0.46	-13.19		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	186	0.00	-7.14	-48.00	-36.59		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	248	2.00	3.21	-14.50	-15.42		

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

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

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

Southern Africa

***Key drivers of maize prices in the Southern Africa region*[39]**

Available Old Stocks	Good harvests during the 2021 harvest seasons continue to provide adequate stocks availability resulting in stable or marginal decline or rise in prices in the region.
Conflicts in Mozambique	Although conflicts and insecurity have improved in parts of Mozambique, agricultural activities in most affected places have not yet improved, impacting maize prices.

Generally, maize prices in the selected Southern African markets have remained the same, declined or rose marginally. In Malawi, Lilongwe prices have remained stable over 1-3 months and declined between 22-33% over 6-12 months. Most selected markets, including the national average, have had low to moderate (0-15%) price increases over the past 1-6 months. All prices are still well below their one-year level. Except for Massinga, most selected markets in Mozambique have lower prices than recorded in the past 1-12 months. Similarly, except for a few markets, particularly over the last one month, most selected markets in Zambia have declined against their previous levels. The high volume of available stocks from the good harvest in the year is a key driver of the generally lower or marginally higher maize prices.[40] However, due to the weather shocks experienced in the region, which are expected to result in lower-than-average harvests, prices are expected to rise well above their current levels in the next 3-6 months.[41] Also, conflicts continue to discourage effective agriculture activities in the affected areas.

Table 4: Changes in maize prices in selected Southern African Countries[42]

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****	120	0.00	0.00	-33.33	-22.58		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	110	8.91	-6.38	-3.93	-31.89		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	133	15.65	2.31	-11.33	-21.76		
Malawi	Maize (white)	National Average, Retail, MWK/KG	152	4.11	3.58	14.07	-24.19		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	170	6.25	6.25	9.91	-20.37		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG*******	13	-7.50	-14.46	-24.45	-6.55	13.34	48.23
Mozambique	Maize (white)	Maputo, Retail, MZN/KG**	26	-31.44	0.92	-8.80	-6.27	15.52	26.37
Mozambique	Maize (white)	Massinga, Retail, MZN/KG**	33	3.47	40.32	83.88	23.42	-14.88	2.20
Mozambique	Maize (white)	Pemba, Retail, MZN/KG*******	17	-38.15	-51.62	-44.46	-0.02	22.62	64.23
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG**	3	0.00	0.00	-32.05	-22.08	40.19	14.93
Zambia	Maize (white)	Chipata, Retail, ZMW/KG**	3	12.80	-6.00	-40.19	-15.32	35.94	12.09
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG**	3	0.00	0.00	-44.75	-19.12	47.97	24.79
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG**	3	2.05	3.56	-38.50	-7.92	23.74	9.76
Zambia	Maize (white)	Mpika, Retail, ZMW/KG**	3	15.38	0.00	-43.50	3.81	12.00	-24.31
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	3	1.02	-2.95	1.02	-7.79		

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

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

[39] FEWSNET, 2022. https://fews.net/southern-africa. Accessed 27 January 2022
[40] Ibid; and EAGC RATIN News: https://ratin.net/site/news_article/10991. Accessed 27th January 2022.
[41] Ibid
[42] Author's construction based on data from WFP (2021) and FAO (2021).

West Africa

Key drivers of the price movements in West Africa include:

Weather Shocks	Prolonged dry spells and flooding in parts of the region have affected cropping and harvests resulting in generally higher food prices.
Armed conflicts and insecurity	Conflicts and insecurity in parts of the region continue to hamper agricultural activities and the trading of staples across the region.
Macroeconomic conditions	Improvement in macroeconomic conditions, coupled with higher international oil prices in Nigeria, had a dampening effect on prices.[43]

Maize prices have generally remained stable or dropped in the selected West African markets over the past 1-6 months due to increased market supplies from the new harvest in the November-December harvest season of most countries[44] (see table 5). However, current prices are well above what was recorded in almost all selected markets a year ago. Also, some markets in Mali and Togo have had higher prices. For instance, all selected markets in Togo, except Lome, have had prices higher (ranging from 9-25%) than they were a month ago, while markets such as Anie, Kara, and Korbongou have had a higher price than they were 1-3 months ago. Notably, Amegran (in Togo), and Ansongo, Badalabougou, and Gao (in Mali), have had moderate (5-15%) to high (>15%) price surges than they were in the past 1-12 months. In addition, Korhogo (in Cote d'Ivoire) also had a low (0-5%) price increase over the past 1-6 months, while Ibadan (Nigeria) saw a price surge over the past 3-12 months. In Mali and northern Nigeria, armed conflicts and insecurity have perpetuated sustained high prices in some markets.

Price forecasts for the next 3-6 months show that Mali will experience price drops except for Kayes Centre, while Ghana and Cote d'Ivoire will largely see moderate-to-high price increases over the current one. Nonetheless, Accra will experience a moderate price decrease over the next 3-6 months, whereas Korhogo and Kumasi will experience moderate and low price drops, respectively, only in the next 3 months.

Table 5: Changes in maize prices in selected West African countries[45]

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***	239	2.74	2.11	0.53	-2.05	-14.03	4.66
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	225	0.00	-18.18	-25.00	12.50	19.74	48.26
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	320	-1.37	8.27	0.00	87.01	-13.16	-5.33
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	259	5.38	-8.90	19.63	47.84	3.25	7.26
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	405	-4.17	-6.59	5.08	110.16	-2.17	4.02
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	215	-5.89	-28.33	-6.93	21.47	31.84	49.41
Mali	Maize (white)	Ansongo, Retail, XOF/KG	275	5.77	10.00	23.32	25.00	-14.71	-15.02
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	288	15.20	15.20	25.22	74.55	-22.81	-18.14
Mali	Maize (white)	Faladié, Retail, XOF/KG	250	2.04	0.00	21.95	42.86	-12.21	-10.56
Mali	Maize (white)	Gao, Retail, XOF/KG	300	6.76	33.33	33.33	33.33	-32.68	-30.15
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	256	-6.91	-18.99	2.40	28.00	10.89	14.80
Mali	Maize (white)	Niarela, Retail, XOF/KG	250	0.00	0.00	25.00	42.86	-14.43	-11.47
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG*****	266	-1.12	19.06	20.68	33.42		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	185	11.08	-21.01	-2.65	29.33		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	171	-1.18	-29.80	-9.16	16.88		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG***	196	-21.80	-27.12	-8.22	17.07		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	174	2.96	-30.85	-10.90	16.81		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	297	19.76	29.13	18.80	120.00		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	250	17.92	24.38	-4.58	44.51		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	245	16.67	0.00	-2.00	84.21		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	253	25.25	1.20	-6.30	31.77		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	240	9.09	14.29	0.00	77.78		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG**	250	-5.66	-16.67	-7.41	31.58		

[43] FEWSNET, 2022. Accessed at: https://fews.net/west-africa/nigeria. Accessed 28 January 2022
[44] Ibid
[45] Author's construction based on data from WFP (2021) and FAO (2021).

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

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

Current millet prices are well above last year's level in all selected West African markets (see table 6). Millet prices are also higher than they were 1-6 months ago in almost all selected markets of Burkina Faso and Mali. In Niger, however, almost all selected markets have experienced price declines over the past 1-6 months. Residual cereal stocks and market garden products have helped reduce the pressure on millet prices. However, reduced agricultural production in conflict areas has caused prices to be well above their levels a year ago.[46] In Nigeria, millet prices have declined against their three-month level but are higher than their levels in the past one month and six months ago. Good seasonal harvests in Nigeria and Niger have generally supported price declines in the region. However, conflicts in parts of the region continue to disrupt cropping and trading activities and drive-up prices in those areas. Generally, millet prices are expected to improve (i.e. drop) in the next 3-6 months in almost all selected markets in Burkina Faso, Mali, and Niger.

Table 6: Changes in millet prices in selected West African countries[47]

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	3.61	-10.99	0.32	24.90	6.63	2.37
Burkina Faso	Millet	Bousse, Retail, XOF/KG	266	14.66	14.66	11.30	43.01	-26.65	-16.62
Burkina Faso	Millet	Dori, Retail, XOF/KG	333	-5.93	19.78	19.78	33.20	-29.56	-19.66
Burkina Faso	Millet	Faramana, Retail, XOF/KG	199	2.58	18.45	27.56	45.26	-29.38	-25.67
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	290	6.62	35.51	28.89	42.16	-33.52	-30.21
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	367	19.54	47.98	48.58	49.19	-38.15	-38.39
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	261	1.56	6.10	10.59	12.99	-6.15	-6.69
Burkina Faso	Millet	Titao, Retail, XOF/KG	258	1.18	37.23	40.22	73.15	-41.54	-29.61
Mali	Millet	Ansongo, Retail, XOF/KG	315	22.09	31.25	36.96	14.55	-26.59	-28.58
Mali	Millet	Badalabougou, Retail, XOF/KG	300	17.65	33.33	46.34	33.33	-31.16	-31.29
Mali	Millet	Faladié, Retail, XOF/KG	294	22.50	30.67	47.00	47.00	-30.52	-30.07
Mali	Millet	Gao, Retail, XOF/KG	331	19.93	24.91	24.91	24.91	-24.79	-24.60
Mali	Millet	Kayes Centre, Retail, XOF/KG	303	-0.33	3.41	10.18	4.48	-4.05	-8.28
Mali	Millet	Niarela, Retail, XOF/KG	269	5.49	34.50	34.50	25.12	-30.77	-30.00
Niger	Millet	Abalak, Retail, XOF/KG	329	13.45	-6.80	-2.08	33.20	-3.95	-1.26
Niger	Millet	Bonkaney, Retail, XOF/KG	283	-5.67	-6.29	-3.74	23.04	-1.92	-1.85
Niger	Millet	Goure, Retail, XOF/KG	296	-1.33	-15.19	-7.21	51.79	-1.70	12.60
Niger	Millet	Katako, Retail, XOF/KG	288	-2.04	-4.32	-2.04	42.57	-7.20	0.68
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	280	0.00	-3.45	18.64	64.71		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	207	12.06	-9.15	4.79	48.49		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	221	22.85	-11.86	8.89	44.40		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	251	2.45	-15.06	0.70	23.04		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	205	-1.20	-14.58	2.50	36.67		

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

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

Except for Gao, sorghum prices have increased in Mali over the past 1-12 months. Similarly, sorghum prices in selected markets of Niger are higher than they were in the past 1, 6, and 12 months but lower than they were three months ago. In Nigeria, sorghum prices have declined compared to 1-3 months ago but are higher than in 6-12 months. In Togo, except for a few markets over certain periods, most markets have experienced lower-than-usual prices over the past 1-6 months, but all markets have had higher prices over the past 12 months. Generally, stocks from current harvests have had a dampening effect on prices in certain markets. In contrast,

[46] FEWSNET, 2022. Accessed at: https://fews.net/west-africa/niger. Accessed 28 January 2022
[47] Author's construction based on data from WFP (2021) and FAO (2021)

the continuing conflicts in the region have sustained higher prices in other markets. In the next 3-6 months, sorghum prices are expected to decrease in Mali and Niger. Prices are expected to be sustained by existing stocks from the last quarter of 2021.

Table 7: Changes in sorghum prices in selected West African countries[48]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Mali	Sorghum	Ansongo, Retail, XOF/KG	250	2.88	7.30	25.00	0.00	-11.59	-8.90
Mali	Sorghum	Badalabougou, Retail, XOF/KG	263	5.20	31.50	31.50	34.87	-30.07	-29.44
Mali	Sorghum	Faladié, Retail, XOF/KG	250	8.70	25.00	25.00	25.00	-28.74	-25.14
Mali	Sorghum	Gao, Retail, XOF/KG	250	0.00	0.00	0.00	0.00	-10.58	-4.90
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	300	15.38	14.07	20.00	18.58	-16.31	-16.33
Mali	Sorghum	Niarela, Retail, XOF/KG	250	8.70	25.00	25.00	42.86	-30.06	-25.46
Niger	Sorghum	Abalak, Retail, XOF/KG	318	7.80	-5.36	-0.93	11.19	-2.67	-1.51
Niger	Sorghum	Bonkaney, Retail, XOF/KG	294	5.76	0.00	14.40	17.13	-5.82	-8.57
Niger	Sorghum	Goure, Retail, XOF/KG	275	0.73	-6.78	9.13	47.06	-13.11	-0.58
Niger	Sorghum	Katako, Retail, XOF/KG	285	1.79	-4.36	10.47	56.59	-4.49	-2.32
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	280	0.00	0.00	25.56	7.69		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	177	-21.59	-30.36	-4.62	31.24		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	250	0.66	-2.66	25.49	63.79		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	279	0.22	-2.79	23.86	25.11		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	190	-18.80	-18.28	8.57	-27.85		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	297	8.00	-2.62	-1.00	41.43		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	220	0.00	0.00	-12.00	39.24		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	276	-1.43	-15.08	-10.97	12.65		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	245	6.52	11.36	-2.00	30.32		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	315	0.00	10.53	0.00	5.70		

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

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

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

Climatic Conditions and Potential Implications for Food and Nutrition Security

The February rainfall forecast for East Africa (Figure 8) indicates wetter than usual conditions in central and north-eastern Tanzania. Compared to the projections in November 2021, wetter than usual conditions are projected over more areas in the region. Western Uganda, south-western South Sudan, central Ethiopia and south-eastern Tanzania are expected to see usual rainfall conditions. In contrast, drier than usual conditions are expected over some areas in north-eastern Ethiopia. Some areas of the region, such as parts of Kenya, have experienced persistent dry conditions that are devasting livelihoods. Livestock continues to die, and crop production is significantly affected with severe impacts on the food and nutrition security of the affected communities. Access to food from surplus production areas (through food trade and humanitarian efforts) to the affected deficit areas remains critical in the affected regions.

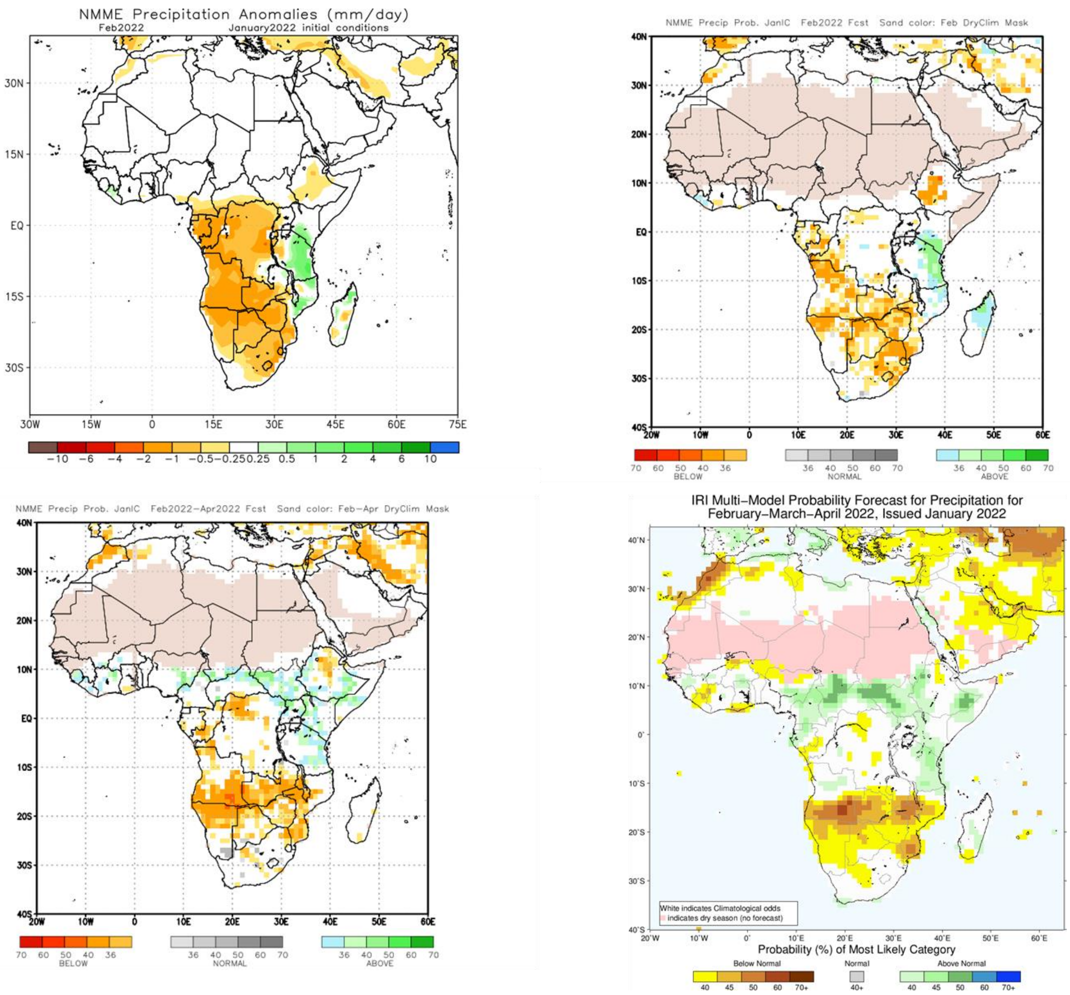
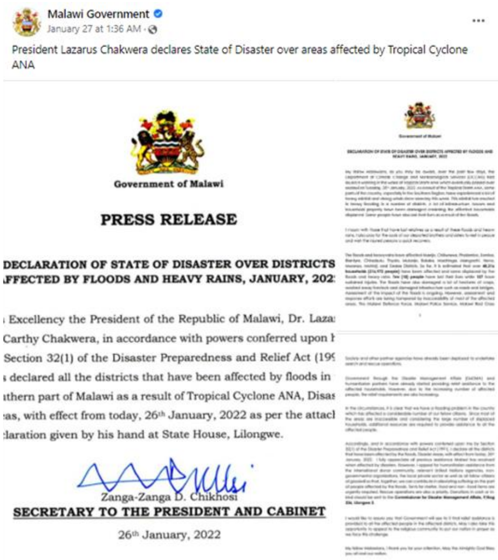


Figure 8: North American Multi-Model Ensemble (NMME) rainfall forecast for February 2022 and the season (February – April 2022), based on January 2022 initial conditions[49]

Parts of Southern Africa are projected to receive above-normal rainfall from February to April 2022. This is a critical crop-growing period in the region, and rainfall improves crop-growing conditions. However, parts of the

[49] 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 and https://iri.columbia.edu/our-expertise/climate/forecasts/seasonal-climate-forecasts/ Accessed 29 January 2022.

region (Madagascar, Malawi and Mozambique) were devasted by the Tropical Storm Ana, which destroyed livelihoods, infrastructure and agricultural activities. The destruction of infrastructure such as roads affects the movement of agricultural inputs and food to areas of need. Malawian President Lazarus Chakwera declared a state of disaster in the affected areas and appealed for humanitarian assistance. In addition to the delayed season in some areas, the heavy rains from the storms will significantly impact the potential seasonal harvests in the affected areas and the region. Most parts of the region are expected to receive heavy rains due to the La Niña effect that affects ocean currents and usually leads to above-average rainfall. The projections in Figure 8 indicate dry conditions in central and western parts of the region, which can significantly affect cropping activities and harvest potentials at the end of the season. Similar to the previous projections, in West Africa, rainfall conditions remain mainly dry.



Malawi Government
January 27 at 1:36 AM
President Lazarus Chakwera declares State of Disaster over areas affected by Tropical Cyclone ANA

Government of Malawi

PRESS RELEASE

DECLARATION OF STATE OF DISASTER OVER DISTRICTS
FFECTED BY FLOODS AND HEAVY RAINS, JANUARY, 202

Excellency the President of the Republic of Malawi, Dr. Laza
Carthy Chakwera, in accordance with powers conferred upon
Section 32(1) of the Disaster Preparedness and Relief Act (19
declared all the districts that have been affected by floods in
thern part of Malawi as a result of Tropical Cyclone ANA, Disa
as, with effect from today, 26th January, 2022 as per the attac
laration given by his hand at State House, Lilongwe.

Zanga-Zanga D. Chikhosi
SECRETARY TO THE PRESIDENT AND CABINET

26th January, 2022

Figure 8: Heavy floods caused by Tropical Storm Ana in Southern Africa and declaration of the state of disaster by Malawian President[50],[51]

[50] https://www.theguardian.com/world/video/2022/jan/28/storm-ana-heavy-floods-hit-southern-africa-after-week-of-torrential-rain-video
[51] https://www.facebook.com/malawigovernment/posts/304259615074210?_rdc=1&_rdr

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