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, considering 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. The opinions expressed in this report are those of the authors and do not reflect the official policy or position of the Alliance for a Green Revolution in Africa (AGRA), its employees, partners, or its affiliates in any way. While AGRA has made every effort to ensure the accuracy and completeness of the information entered in this report, we assume no responsibility for any errors, inaccuracies, omissions, or inconsistencies included herein. The mention of specific companies, manufacturers or their products, whether or not these have been patented, does not imply endorsement or recommendation or approval by AGRA, its employees, partners or their affiliates in preference to others of a similar nature that are not mentioned. The descriptions, charts and maps used do not imply the expression of any opinion whatsoever on the part of AGRA concerning the development, legal or constitutional status of any country.

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 March Food Security Monitor are summarised below.

Food Security Outlook. The food insecurity hotspots in March 2022 were South Sudan, Burkina Faso, Mali and Niger.

The Russia-Ukraine conflict continues to push food and energy prices up across the continent creating serious food security challenges.

In response to the ongoing crisis in Ukraine, the African Development Bank has announced a USD 1 billion plan to boost the production of climate-resilient wheat by 40 million farmers across the continent in an effort to avert severe food shortages induced by the conflict in Ukraine.

Food insecurity continues to persist across the East Africa region driven by multiple shocks including rising food prices, the knock-on effects of conflicts/insecurity, displacement/migration, and destitution following loss of livelihood assets.

Food security outcomes are set to improve across most parts of the Southern African region as the harvest season approaches. However, these improvements are likely to be shortlived as harvests are projected to be below-average due to the poor season which was characterised by erratic rains and tropical cyclones.

The West African region is facing its worst food crisis in a decade as 27 million people are reported to be currently hungry with the number expected to increase to 38 million by June this year

Food Trade

In East Africa, Equity Bank, has announced plans to boost the private sector in its six countries of operation through a Regional Private Sector Economic Recovery and Resilience Stimulus Plan. The funding will target SMEs in East and Central Africa's agriculture, manufacturing and logistics, trade and investment, social and environmental sectors over the next five years.

In West Africa, The ECOWAS Commission, with support from the Trade Facilitation West Africa (TFWA) Programme, launched the ECOWAS Regional Trade Facilitation Committee (ERTFC). The ERTFC is set to support trade facilitation through simplifying exports, imports, and transit procedures within and outside the region.

Commodity Prices

Grain prices continue to increase with the Grains and Oilseeds Index rising by 7.1% month-on-month and 17.4% year-on-year.

Three consecutive failed rains or droughts and flooding in parts of the East African region have hampered agricultural production activities leading to low agriculture output and high commodity prices.

The off-season period and reduced food stocks contribute to price surges typical in the Southern African region in this period. Additionally, tropical storms and droughts have driven speculative price hikes in the region.

Insecurity and armed conflicts continue to disrupt economic activities in the West African region, reducing grain availability and causing higher prices.

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

Russia-Ukraine Conflict and Food Security in Africa

As the Russia-Ukraine conflict rages on, its impact on the food security situation in Africa is increasingly becoming evident. Over the past month, several countries on the continent saw fuel prices going up, further pushing food prices up. This is worsening the food security situation across most countries that are already grappling with below-average food supplies due to poor season performance in the past year. Food prices across the Sahel Region in West Africa have risen by more than 20 percent since the conflict started, and the situation continues to worsen as food reserves dwindle[1]. In Kenya, freighters have increased shipping charges by 10 percent in response to the rising costs of fuel, a situation they have ascribed to the conflict in Ukraine[2]. In addition to increases in commodity prices for food and energy, the conflict in Ukraine is also impacting trade for countries in Africa that export to Russia. Kenya has reported that tea, flowers, coffee and fruit exports to Russia - estimated at Sh10 billion annually - have been affected by the sanctions that have been imposed on Russia by Western nations[3]. This move has affected smallholder farmers in these export supply chains.

In recognition of the impact of the conflict on food security on the continent, organisations such as the African Development Bank (AfDB) have come up with measures to prevent severe food crises on the continent. Notably, the AfDB has announced a USD 1 billion plan to boost wheat production on the continent to avert shortages from the Russia-Ukraine conflict. The Bank announced that the fund will target 40 million farmers, who will be supported through climate-resilient technologies for the production of wheat and other crops[4].

Prevalence of Insufficient Food Consumption and Food Insecurity Hotspots

Figure 1 provides a status update on the prevalence of insufficient food consumption across 17 selected East, Southern and West African countries in March. During the month of March, 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. These hotspot countries were: South Sudan (58%), Burkina Faso (59%), Mali (65%) and Niger (75%).

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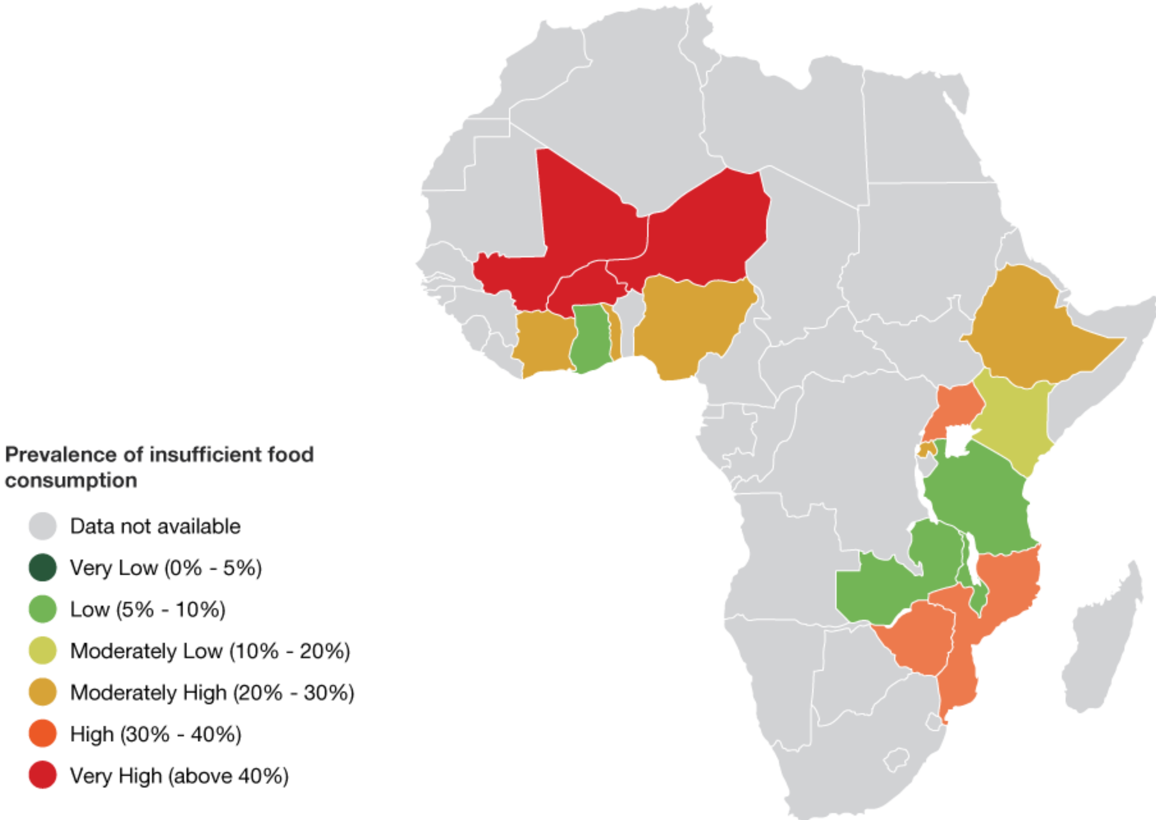
[1] https://reliefweb.int/report/burkina-faso/west-africa-faces-its-worst-food-crisis-ten-years-over-27-million-people-already Accessed 3 April 2022. Accessed 31 March 2021
[2] https://www.businessdailyafrica.com/bd/corporate/shipping-logistics/russia-ukraine-conflict-set-to-exert-toll-on-local-exporters-3733688 Accessed 31 March 2021
[3] https://www.businessdailyafrica.com/bd/markets/global-markets/sanctions-block-sh10bn-kenya-exports-to-russia-3736492 Accessed 31 March 2021
[4] https://www.bloomberg.com/news/articles/2022-03-15/africa-can-wean-off-russia-wheat-with-1-billion-plan-afdb-says?utm_source=google&utm_medium=bd&cmpId=google

Figure 1: Prevalence of Insufficient Food Consumption, Mar 2022[5]



Source: Own analysis based on data from WFP (2022)[6]

East Africa

As of 31 March 2022, 61.2 million people across six selected East African countries did not have sufficient food for consumption. This represents a 6.43 percent increase from February 2022, indicating that the food security situation deteriorated across these focus countries. Table 1 provides updates on how the prevalence of insufficient food consumption changed across each of the selected East African countries during March.

During the month, Kenya recorded a moderate decrease in the number of people with insufficient food for consumption while South Sudan recorded a low decrease with the prevalence of insufficient food for consumption remaining very high (58%). Rwanda, Tanzania and Uganda all recorded a moderate increase in the number of people with insufficient food for consumption during the month. However, despite this increase, in Tanzania, the prevalence levels (9%) remained low. In Ethiopia the number of people with insufficient food for consumption did not increase but the prevalence levels remained moderately high (23%).

Table 1: Prevalence of insufficient food consumption across selected East African countries (Mar,2022)[7]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Ethiopia	109.20	21.80	25.30	23.17	16.06	7.20	36.80
Kenya	51.40	7.80	6.40	12.45	-17.95	4.20	26.20
Rwanda	12.30	2.50	2.70	21.95	8.00	2.30	38.30
South Sudan	11.00	6.60	6.40	58.18	-3.03	22.70	31.30
Tanzania	56.30	4.70	5.20	9.24	10.64	3.50	31.80
Uganda	42.70	14.10	15.20	35.60	7.80	3.50	28.90

**Previous month and ** Current month*

[5] https://hungermap.wfp.org/ Accessed 31 March 2021
[6] https://hungermap.wfp.org/. Accessed 31 March 2021
[7] https://hungermap.wfp.org/ Accessed 31 March 2021

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

Southern Africa

As of 31 March 2022, the number of people with insufficient food for consumption across the selected focus countries in Southern Africa stood at 20.3 million. This represents a 4.7 percent decrease from February 2022, indicating that the region's food security situation improved over the reporting period. Table 2 provides an update of how the prevalence of insufficient food consumption changed across each of the selected Southern African countries during March.

In Zimbabwe, the situation did not change as the prevalence levels of insufficient food consumption remained high (36.1%). The rest of the countries recorded moderate decreases in the number of people with insufficient food for consumption during the month.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (Mar 2022)[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 (%)
Malawi	18.10	2.90	2.70	14.92	-6.90	↓	1.30	39.00
Mozambique	29.50	10.30	9.70	32.88	-5.83	↓	4.40	42.30
Zambia	17.40	2.90	2.70	15.52	-6.90	↓	4.20	34.60
Zimbabwe	14.40	5.20	5.20	36.11	0.00	●	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

The number of people with insufficient food for consumption across seven selected countries in West Africa was 111.2 million as of 31 March 2022. This was a 4.4 percent increase from February 2022, suggesting that the region's food security situation deteriorated over the reporting period. Table 3 provides an update of how the prevalence of insufficient food consumption changed across each of the selected West African countries during March.

All the countries in the region - except for Togo, where the situation did not change - recorded increases in the number of people with insufficient food for consumption during the month. Burkina Faso and Nigeria recorded low increases, while the prevalence levels in Burkina Faso remained very high (59%). Niger recorded a moderate increase, which pushed the prevalence levels to extremely high, with the country seeing 75% of its total population living without sufficient food for consumption during the month. The prevalence levels in Mali also remained very high (65%) as the country recorded a moderate increase in the number of people with insufficient food for consumption.

Table 3: Prevalence of insufficient food consumption in selected West African countries (Mar 2022)[9]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)		Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Burkina Faso	19.80	11.30	11.70	59.09	3.54	▲	8.40	24.90
Cote d'Ivoire	25.10	5.50	5.90	23.51	7.27	↑	6.10	21.60
Ghana	29.80	5.40	5.70	19.13	5.56	↑	6.80	17.50
Mali	19.10	11.80	12.50	65.45	5.93	↑	9.00	26.90
Niger	22.40	14.80	16.80	75.00	13.51	↑	14.10	48.50
Nigeria	202.80	55.60	56.50	27.86	1.62	▲	6.80	36.80
Togo	7.90	2.10	2.10	26.58	0.00	●	5.70	23.80

[8] https://hungermap.wfp.org/ Accessed 31 March 2021
[9] https://hungermap.wfp.org/ Accessed 31 March 2021

**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%)

East Africa Food Security Outlook

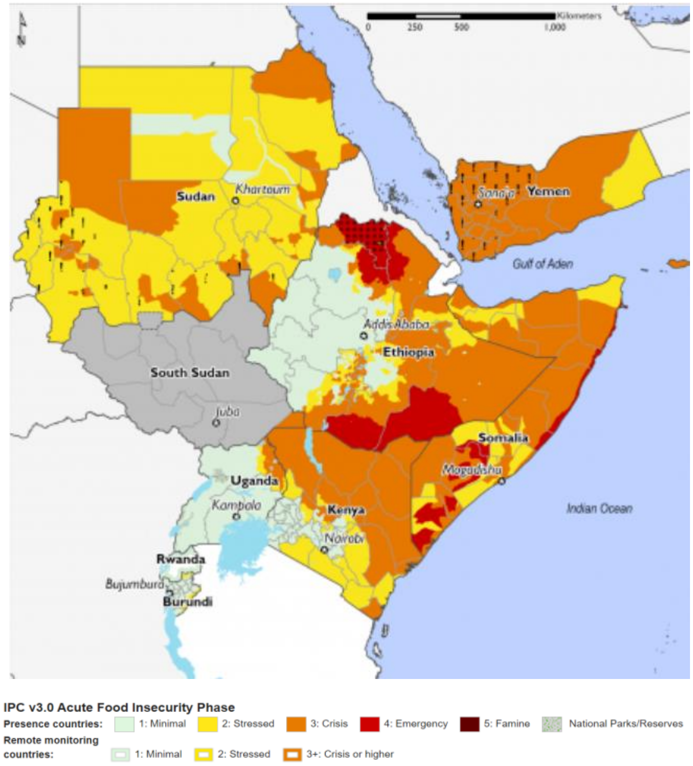


Figure 3: East Africa countries Food Security Outlook, Feb-May 2022

Food insecurity continues to persist across the East Africa Region driven by multiple shocks including rising food prices,knock on effects of conflicts/insecurity, displacement/migration, and destitution following loss of livelihood assets[10].

Tanzania: Prolonged dry spells and erratic rainfall have resulted in poor crop and livestock production, which have led to limited food availability. The poor season performance has also contributed to a reduction in the availability of on-farm and post-harvest labour opportunities thus limiting the income for food purchases[11].

Kenya: The poor performance of the 2021 short rains, which resulted in poor crop performance continues to be the main driving factor behind the prevailing food insecurity situation in the country. This has resulted in a lack of adequate food supplies, which have pushed food prices up, further worsening the food security situation.

Rwanda: Localized floods and high food and fertilizer costs have placed pressure on some households particularly in the Northern Province. Floods and subsequent post-harvest losses have reduced incomes for bean farmers leading to a predominatley IPC Phase 2 (Stressed) outcome across most parts of the affected province. However, IPC Phase 1 (Minimal) ouctomes are expected to persist across most parts of the country where adequate food and incomes from the Season A harvest and Season B cultivation labour income are being recorded[12].

[10] IPC East and Central Africa Region Update (Food Security and Nutrition Working Group, March 2022)
[11]
[12] https://reliefweb.int/report/rwanda/rwanda-key-message-update-localized-floods-and-high-food-and-fertilizer-costs-place Accessed 3 April 2022.

Southern Africa Food Security Outlook

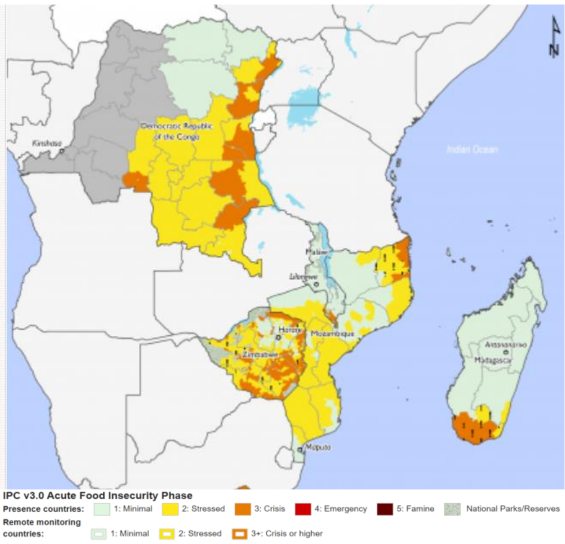


Figure 4: Southern Africa countries Food Security Outlook, October 2021- January 2022

Malawi: As the harvest season approaches, the Northern and Central parts of the country are projected to experience IPC Phase 1(Minimal) outcomes despite a poor start to the season, while the Southern parts of the country are projected to experience IPC Phase 2 (Stressed) outcomes driven by back-to-back tropical cyclones. However, these improved food security outcomes are set to be eroded by poor macroeconomic conditions which may lead to food price increases that will worsen the food security situation towards September[13].

Mozambique: IPC Phase 3 and Phase 2 outcomes persisted during the month of March driven by the conflict in Cabo Delgado, below-average rainfall in southern and parts of central Mozambique, and flooding and damage from tropical storms Ana and Dumako, and tropical cyclone Gombe. The harvest period for the upcoming season is likely to be delayed by a month across the country because some households engaged in post-flood planting[14].

Zambia: The sharp increases in staple food prices - mainly maize and maize flour - in the Northern province have been contributing to food insecurity situations in affected areas despite the country reporting above average maize stocks during the same period. Despite the prolonged dry spells at the beginning of the season, the maize crop is reportedly in good-to-fair condition, which may lead to improved food security outcomes as the harvest season approaches[15].

Zimbabwe: IPC Phase 3 and IPC Phase 2 outcomes persisted across most deficit producing regions as the lean season continued. The surplus producing regions on the other hand continued to enjoy benefits from the above-average 2021 harvests, which led to IPC Phase 1 (Minimal) outcomes. The general poor season performance across most parts of the country as a result of erratic rainfalls and prolonged dry spells has seen more that 50 percent of the maize crop being written off in some eastern, southern, and western districts. In addition, and due to the ongoing Russia-Ukraine conflict, fuel costs have risen contributing to an increase in the prices of basic commodities and affecting the food security situation[16].

West Africa Outlook

The region is facing its worst food crisis in a decade as 27 million are reported to be currently hungry with the number expected to increase to 38 million by June this year. Cereal production in parts of the Sahel region have dropped, and food reserves are declining leading to significant increases in food prices across most countries in the region. This has also been attributed to the ongoing Russia-Ukraine conflict, which has seen food prices rise by more that 20 percent[17].

Mali: Economic disruptions, population displacements, thefts and subsequent fatalities have been disrupting access to food for most people in the country leading to Stressed and Crisis food security outcomes. Food prices have risen by 20 to 30 percent further limiting access for many low-income households, whose incomes

[13] https://reliefweb.int/report/malawi/malawi-key-message-update-consecutive-tropical-storms-southern-malawi-further-limit Accessed 3 April 2022.
[14] https://reliefweb.int/report/mozambique/mozambique-key-message-update-20212022-harvest-likely-be-delayed-month-across-most Accessed 3 April 2022.
[15] https://reliefweb.int/report/zambia/zambia-food-security-bulletin-february-2022 Accessed 3 April 2022.
[16] https://reliefweb.int/report/zimbabwe/zimbabwe-key-message-update-international-food-and-commodity-price-hikes-drive-sharp Accessed 3 April 2022.
[17] https://reliefweb.int/report/burkina-faso/west-africa-faces-its-worst-food-crisis-ten-years-over-27-million-people-already Accessed 3 April 2022.

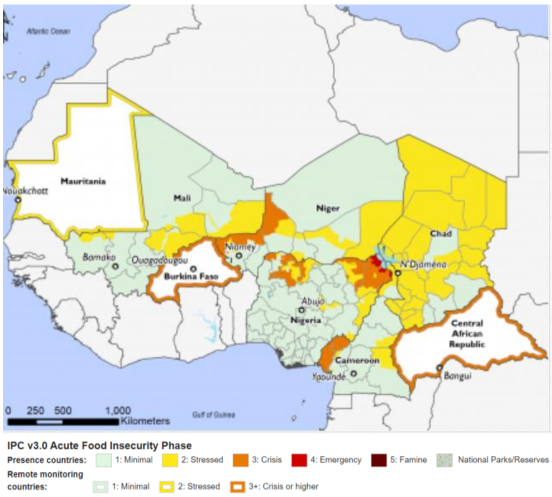


Figure 5: West Africa countries Food Security Outlook, Feb-May 2022

have been declining. However, off-season rice harvests between May and June are expected to contribute to improved outcomes[18].

Niger: Food prices are near record levels despite the stable macroeconomic situation. IPC Phase 3 outcomes are being experienced across most parts of the country as access to food from own production and purchasing remains limited. Conflicts continue to disrupt food access in the North-Western parts of the country, where bandit attacks were reported in March[19].

Food Trade Updates

East Africa

Equity Bank, the largest banking group in East Africa, has announced plans to boost the private sector in its six countries of operation through a Regional Private Sector Economic Recovery and Resilience Stimulus Plan. The funding will target SMEs in East and Central Africa's agriculture, manufacturing and logistics, trade and investment, social and environmental sectors over the next five years[20]. The East African region industrialists have called for a 10 percent increase in the Common External Tariff which will set the CET at 35 percent. The proposal is designed to safeguard products deemed to be adequately produced within the region against cheap imports[21]. This move will slow down the African Continental Free Trade Area (AfCFTA) efforts, which seek to promote free trade across the continent.

Figure 6 below provides an update of the various events and activities recorded across different countries in East Africa over the past month, impacting food trade in the region.

[18] https://reliefweb.int/report/mali/mali-key-message-update-difficult-s-d-acc-s-des-m-nages-pauvres-aux-vivres-cause-du-prix Accessed 3 April 2022.
[19] https://reliefweb.int/report/nigeria/nigeria-key-message-update-while-macroeconomy-remains-stable-food-prices-are-expected Accessed 3 April 2022.
[20] https://www.theafricareport.com/183137/drc-kenya-rwanda-equity-banks-6bn-marshall-plan-for-smes/ Accessed 3 April 2022.
[21] https://www.newtimes.co.rw/news/decision-eac-common-external-tariff-pushed-april Accessed 3 April 2022.

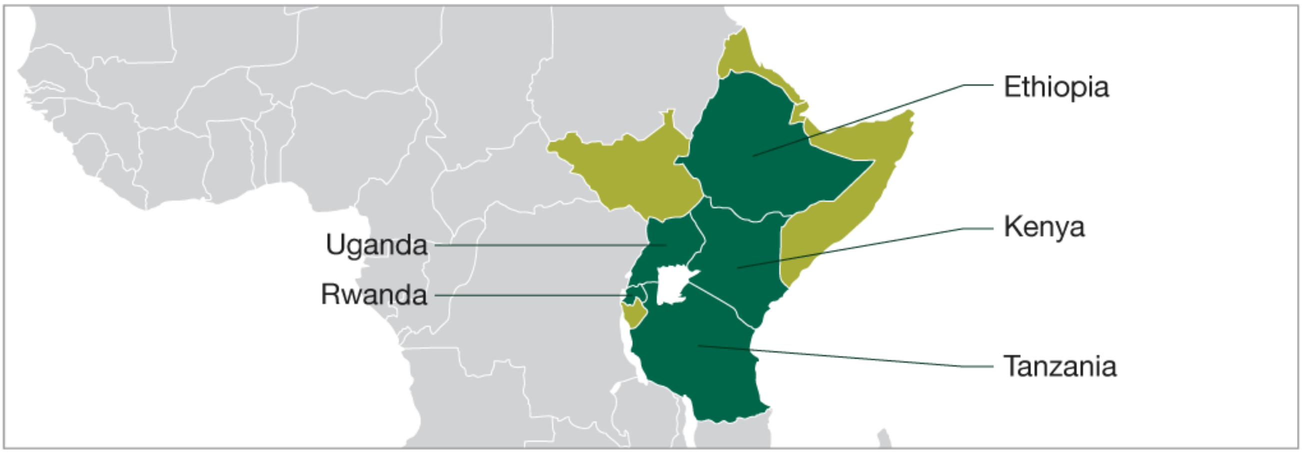


Figure 6: East Africa Cross border trade updates March 2022[22]

RWANDA

- Rwanda has now fully reopened the Gatuna border with Uganda, ending a three-year impasse on the Northern Corrido.

TANZANIA

- Tanzania and Kenya have resolved 10 more trade barriers in efforts to grow trade between the two member states of the East African Community (EAC).
- This follows President Samia Suluhu Hassan's visit to Kenya to discuss the deteriorating bilateral ties. Since these engagements, 56 issues were reported to have been resolved in 2021, prompting the growth of trade between the two countries by 38 percent to $765 million.

KENYA

- After many failed starts, talks to resolve the milk importation dispute with Uganda were proposed to start as Kenya seeks to ascertain that milk is coming from Ugandan farmers, and not from third-party countries.
- Despite this dispute, Kenya is currently experiencing a shortage of milk supplies with the dairy regulator reporting that they may decide to import if the situation becomes critical.
- Transporters have complained about the shortage of Regional Electronic Cargo Tracking Seals (RECTS) that are exclusively owned and operated by the Kenya Revenue Authority (KRA) citing that they are leading to delays at the Mombasa port, and increasing costs of doing business.
- Tea , flowers, coffee and fruit exports worth KSh10 billion from Kenya to Russia have been affected by the sanctions imposed on Russia, negatively affecting farmers.
- The easing of COVID-19 restrictions, notably exemption of PCR tests for truck drivers that are fully vaccinated is expected to improve trade processes and movements across borders.
- There are growing concerns of potential supply chain disruptions and increases in transport costs by importers potentially from political tension ahead of the 9 August elections.

UGANDA

- In a move that demonstrates efforts to improve ongoing constrained trade relations, Uganda will compensate Kenyan fish exporters to the Democratic Republic of Congo, whose catch officials confiscated on October 1, 2021, at the Mpondwe border in the Kasese district of Uganda.
- Kenyan fish farmers claim Ugandan officials had confiscated fish worth more than $400,000 destined for the DRC.

Ethiopia

- Small scale trade along the Kenya- Ethiopia border is poised to thrive following bilateral negotiations between the two parties to agree on a Common List of products to be traded under the COMESA Simplified Trade Regime (STR).
- The negotiations took place on 1st March 2022 at the Moyale border post and addressed the implementation of the STR between two countries.

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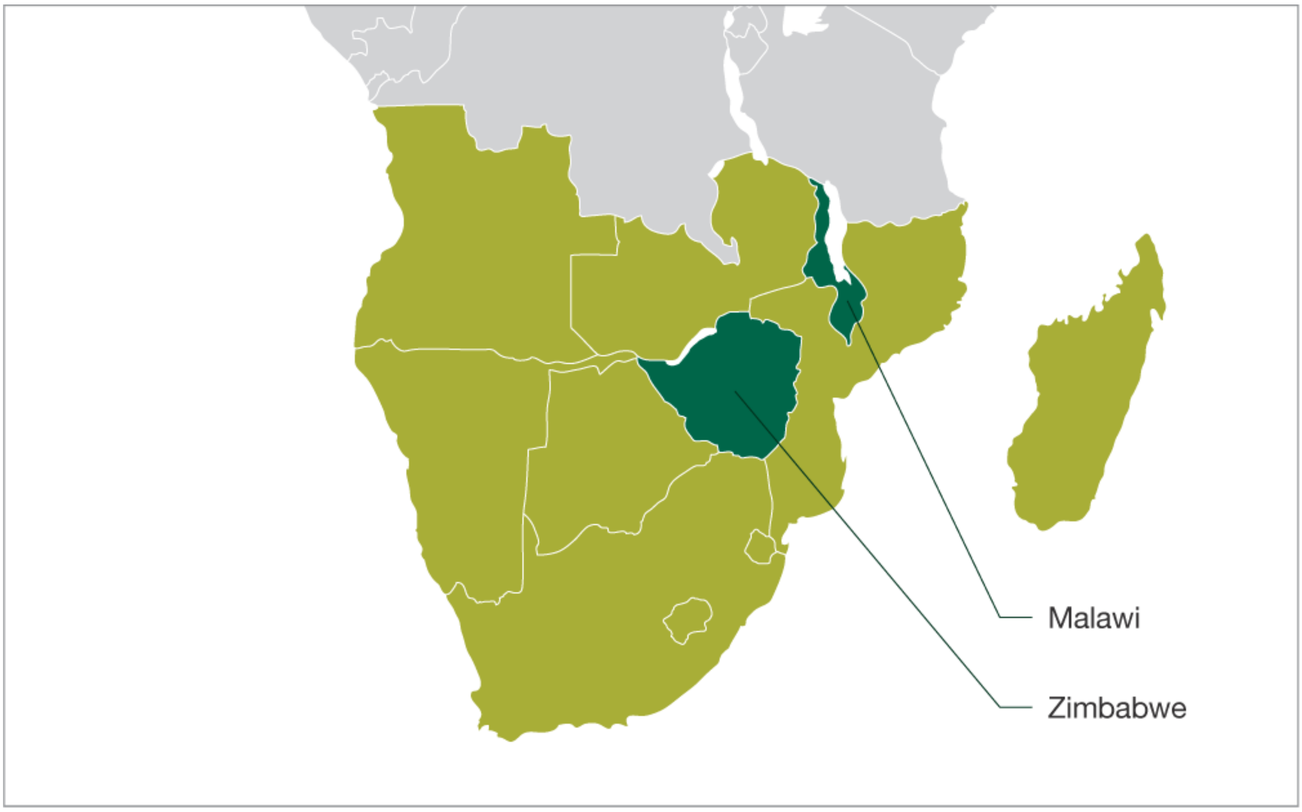
[22] https://www.theeastafrican.co.ke/tea/business/kenya-and-uganda-revive-talks-on-milk-3732414 Accessed 01 April 2022
https://www.businessdailyafrica.com/bd/corporate/shipping-logistics/truckers-blame-kra-tracking-system-for-costly-port-delays-3733708 Accessed 01 April 2022
https://www.businessdailyafrica.com/bd/markets/global-markets/sanctions-block-sh10bn-kenya-exports-to-russia-3736492 Accessed 01 April 2022https://www.comesa.int/kenya-ethiopia-small-scale-cross-border-trade-set-to-rise/
https://www.businessdailyafrica.com/bd/corporate/shipping-logistics/tougher-times-for-consumers-as-high-transport-costs-kick-in-3749056 Accessed 01 April 2022
https://www.comesa.int/kenya-lifts-major-covid-19-restrictions/ Accessed 01 April 2022
https://www.theeastafrican.co.ke/tea/news/east-africa/anxiety-grips-importers-months-to-kenya-s-election-3753336
https://theconversation.com/rwanda-has-reopened-the-border-with-uganda-but-distrust-could-close-it-again-176861 Accessed 01 April 2022
https://www.theeastafrican.co.ke/tea/business/uganda-kenya-end-row-on-fish-exports-to-drc-3745398 Accessed 01 April 2022
https://www.thecitizen.co.tz/tanzania/news/tanzania-kenya-resolve-10-more-trade-hindrances-3748686 Accessed 01 April 2022

Southern Africa

Figure 7 summarises some of the key activities and events recorded across Southern Africa that impact food trade activities.

Figure 7: Southern Africa Food Trade updates for Mar 2022[23]



ZIMBABWE

- Zimbabwe and Rwanda held their second edition of the Zimbabwe-Rwanda Trade and Investment conference on the 28th of March in Harare.
- During the conference, the Zimbabwean President stressed that the trade and investment partnership between Rwanda and Zimbabwe must yield increased trade volumes between both countries.

MALAWI

- The COMMON Market for Eastern and Southern Africa (COMESA) Secretary General has urged Malawi to expedite the process of ratifying the Tripartite Free Trade Area Agreement (TFTAA).
- The trade agreement will facilitate free movement of goods, services and businesspersons among COMESA member states in a quest to stimulate economic activities.

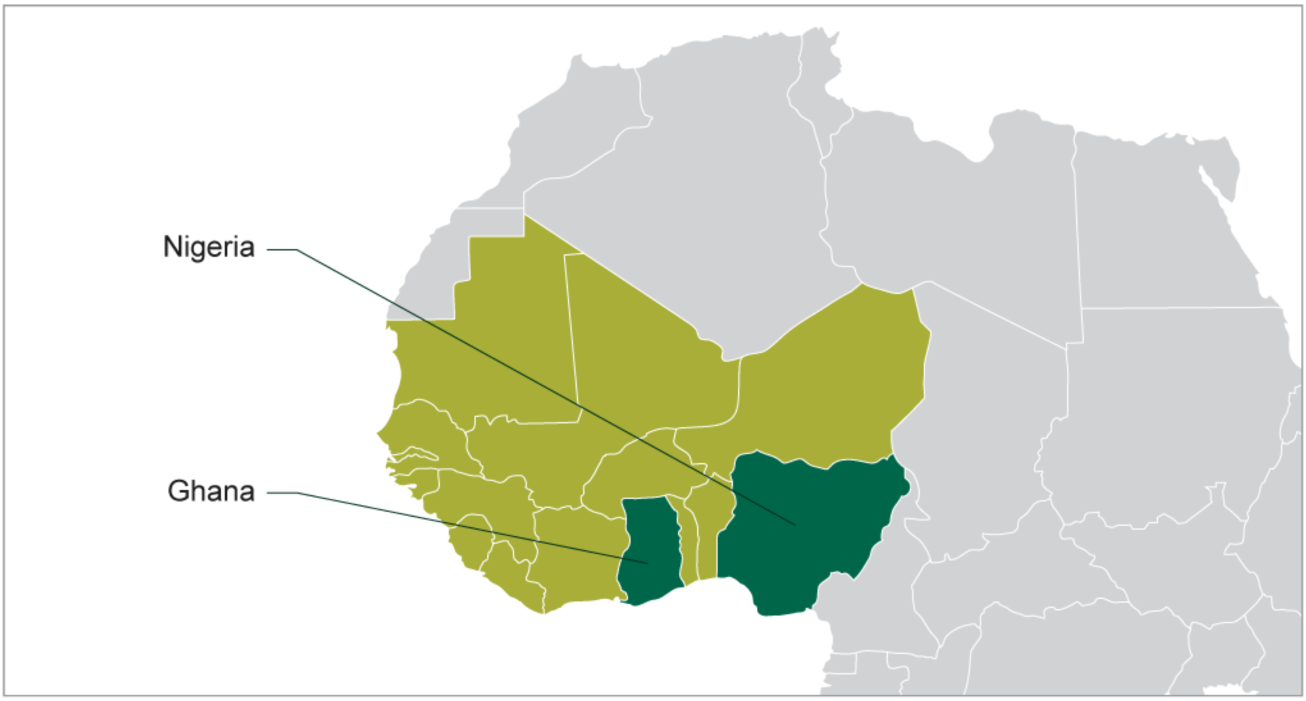
[23] http://www.daily-mail.co.zm/comesa-boss-tips-malawi-over-tftaa-ratification/ Accessed 01 April 2022
https://www.newtimes.co.rw/news/president-mnangagwa-calls-greater-trade-ties-rwanda Accessed 01 April 2022

West Africa

The ECOWAS Commission, with support from the Trade Facilitation West Africa (TFWA) Programme, launched the ECOWAS Regional Trade Facilitation Committee (ERTFC). The ERTFC is set to support trade facilitation through simplifying exports, imports, and transit procedures within and outside the region[24]. The Commission also collaborated with the United Nations Conference on Trade and Development (UNCTAD) and organised the Second Regional Meeting on the development of the Regional Ecommerce Strategy to present the findings of the ECOWAS E-Trade Readiness Assessment. Results from the assessment show the importance that ECOWAS Member States have placed on digital transformation and e-commerce. On the back of these results, the Commission has stressed the need for an ECOWAS e-commerce strategy that addresses identified challenges and strengthens cross-border e-commerce development efforts, deepens integration, and boosts intra-regional trade[25].

Figure 8 provides an update of issues and events reported in selected West African countries that impacted food trade and food security in the region.

Figure 8: West Africa Cross Border Trade Updates Mar 2022[26]



NIGERIA

- The federal government has inaugurated a committee that would create a process of certifying halal products made in Nigeria to benefit from the $2.6 trillion global halal market.

GHANA

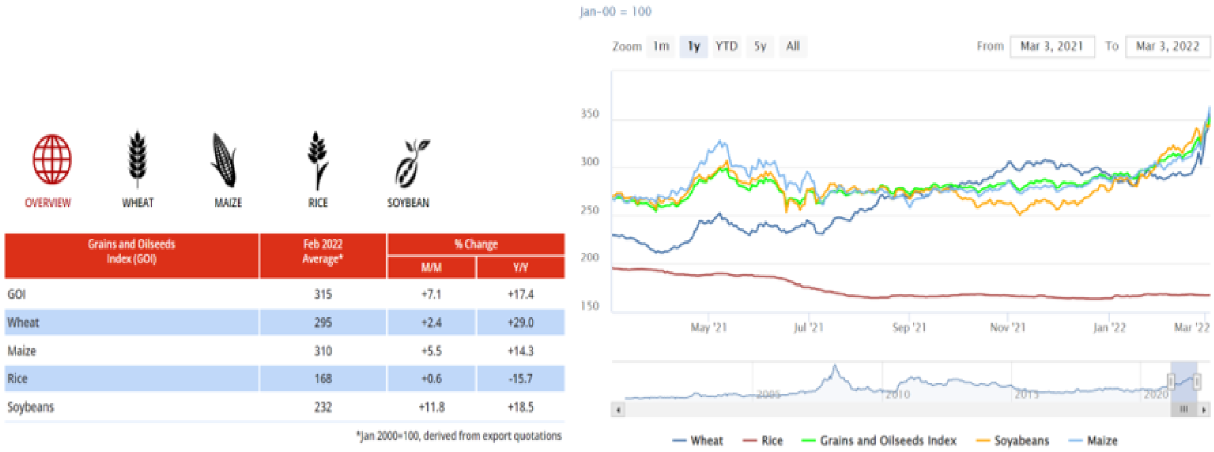
- The Ghana Tuna Association (GTA) has set-out modalities to take advantage of the opportunities being offered through the Africa Continental Free Trade Area (AfCFTA) platform to expand its production and market for Tuna consumption in Africa.
- The Ghana National Coordinating Office (NCO) of the AfCFTA has engaged stakeholders in the business community to develop an electronic Trade Information Repository interfaced with the African Trade Observatory (ATO) to increase trade prospects of Ghanaian businesses in the AfCFTA market.

[24] https://ecowas.int/53802/ Accessed 01 April 2022
[25] https://thenewdawnliberia.com/ecowas-e-commerce-experts-meet-to-consider-the-findings-of-the-regional-etrade-readiness-assessment/ Accessed 01 April 2022
[26] https://dailytrust.com/nigeria-eyes-2-6tr-halal-trade-with-product-certification-scheme Accessed 01 April 2022
https://newsghana.com.gh/gta-ready-for-africa-continental-free-trade-area/ Accessed 01 April 2022
https://thebftonline.com/2022/03/18/nco-engages-exporters-on-trade-info-repository-under-afcfta/ Accessed 01 April 2022

Agricultural Commodities Price Monitoring

Overview of Global Prices

The cumulative effect of the COVID pandemic, the rise in fuel prices and its attendant transport costs, the rise in input prices such as fertilizer, and the conflict in Ukraine has increased global food prices, which is likely to exceed the food crisis experienced in 2008 and 2012. Grain prices continue to increase with the Grains and Oilseeds Index rising by 7.1% and 17.4% month-on-month and year-on-year, respectively (see figure 9). Month-on-month, wheat prices have increased by 2.4%, maize by 5.5%, rice by 0.6%, and soybeans by 11.8%.



Grains and Oilseeds Index (GOI)	Feb 2022 Average*	% Change	
		M/M	Y/Y
GOI	315	+7.1	+17.4
Wheat	295	+2.4	+29.0
Maize	310	+5.5	+14.3
Rice	168	+0.6	-15.7
Soybeans	232	+11.8	+18.5

*Jan 2000=100, derived from export quotations

Figure 9: Global Commodity Prices, February 2022[27]

East Africa

Key drivers of commodity prices in EA[28]

Weather Shocks

Three consecutive failed rains or droughts, and flooding in parts of the East African region have hampered agriculture production activities leading to low agriculture output and high commodity prices.[29]

Conflicts

Conflicts in parts of the East African region, particularly in Ethiopia and South Sudan, continue to affect food prices, as the situation constrained farming and trading activities.[30] Also, a knock-on effect of the war in Ukraine is expected to affect grain prices in the East African countries.[31]

Macroeconomic Shocks

Persistent inflation and depreciation of the Ethiopian Birr (ETB) continues to put additional upward pressures on commodities prices in Ethiopia.

[27] http://www.amis-outlook.org/index.php?id=48513. Accessed on 5th April 2022
[28] FEWSNET, 2022. https://fews.net/east-africa. 5th April 2022
[29] https://ratin.net/site/news_article/11174; https://nation.africa/kenya/news/hunger-2-8-million-kenyans-urgent-need-food-3759584
[30] FEWSNET. https://fews.net/east-africa. Accessed on 5th April 2022
[31] https://theconversation.com/what-explains-food-price-hikes-in-kenya-and-what-should-be-done-179597

Overall, maize prices have begun to reflect the general indications of a looming food price surge in East Africa. Observably, maize prices have gone up in most markets in South Sudan and Uganda but declined in most markets in Ethiopia, Rwanda, and Tanzania, in the past one month. Similarly, compared to the past three months, prices have risen in Kenya, South Sudan, and Tanzania, but declined in Ethiopia and Uganda. With the exception of Rumbek, Torit, Wau, and to some extent Juba, all in South Sudan, all select markets have experienced maize price hikes that are far higher than they were 6-12 months ago. In general, conflicts, droughts due to three consecutive poor rainy seasons, and/or floods in the East African continue to drive up prices due to low production across the region.[32] Ethiopia on its part has been experiencing persistently high food inflation reaching 41.9 percent in February, up from 39.9 percent the previous month.[33] In Rwanda, favourable season A harvests are driving lower prices.[34] In Uganda, seasonal declines in maize stocks are responsible for price surges. Forecast data available for Tanzania shows lowering of maize prices in the next 3-6 months as new harvests begin to kick in.

Table 1: Changes in maize prices in selected East African Countries[35]

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**	21	-7.43	-10.00	8.72	97.38		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG**	24	-2.16	-3.01	12.05	82.40		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	36		0.44	24.20	44.06		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	40		0.22	19.34	11.47		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	34			14.52	24.95		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG	254	-23.75	-26.86	18.56	-8.13		
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	450	10.71	24.42	74.19	17.39		
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	273	-13.17	-17.40	22.04	3.37		
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	223	-33.99	-29.47	10.87	19.64		
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	215	20.97	15.38	21.75	3.45		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	396	1.61	12.41	5.48	-4.35		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG**	277	3.64	-40.78	-45.74	-21.06		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	200	16.67	33.33	-13.58	-8.26		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	286	11.11	3.41	0.00	0.00		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	61,000	-4.56	24.38	30.64	15.64		
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	61,318	0.87	29.43	30.46	14.08	-6.22	-19.89
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	60,500	-2.42	24.47	38.59	22.84		
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	59,484	-38.80	27.79	50.77	16.25	2.39	-9.12
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	60,682	1.14	4.62	1.14	-9.01	-0.43	4.21
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	1,091	27.52	-2.51	14.24	43.21		
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	938	13.38	-14.60	6.28	26.85		
Uganda	Maize (white)	Lira, Wholesale, USh/KG	871	7.13	-11.89	0.78	29.73		
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	849	11.79	-13.95	8.75	31.62		

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

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

Beans prices in the selected East African markets show mixed results. Compared to the past month, prices have risen in all selected markets in Rwanda, and in Arusha and Kampala, while it had declined in all other selected markets (see table 2). Increased beans prices over the last month are attributed to some localised flooding and post-harvest losses.[36] Similarly, compared to the past 3 months, beans prices have declined in all selected Rwandan markets except Nyabiheke (camp). On the other hand, beans prices have risen in most selected Tanzanian and Uganda markets except in Dodoma, Kigoma, and Lira. Compared to the past six months, beans prices have declined in all selected markets of Rwanda and Uganda, while they have surged in most Tanzanian markets except Kigoma. Current beans prices are, however, lower in all selected markets

[32] https://ratin.net/site/news_article/11333; https://fews.net/east-africa
[33] Ibid
[34] https://fews.net/east-africa/rwanda
[35] Author's construction based on data from WFP (2022) and FAO (2022)
[36] https://fews.net/east-africa/rwanda

except in Arusha than they were a year ago. Forecasts available for Tanzania shows lower prices, generally, in the next 3-6 months.

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	248	1.36	-10.24	-25.87	-41.34		
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	350	7.69	-9.07	-23.64	-30.46		
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	275	10.44	-14.10	-37.41	-44.40		
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	307	22.67	8.24	-31.47	-30.30		
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	179,091	2.70	16.64	18.63	1.07	-13.07	-14.83
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	184,682	-11.28	-7.18	3.82	-9.25		
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	125,000	-5.66	-4.84	-8.33	-20.32	-13.74	-26.23
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	188,182	-2.24	1.72	3.40	-12.47	6.22	-2.55
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	185,000	0.00	2.30	19.35	-19.13	-0.36	-3.82
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG	1,803	10.06	16.12	-2.10	-22.16		
Uganda	Bean (dry)	Lira, Wholesale, USh/KG	1,499	-2.57	-0.26	-5.61	-31.91		

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

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

Table 3 shows that in Addis Ababa, Ethiopia, current sorghum prices are higher than they were 6-12 months ago. However, compared to the past 1-3 months, red sorghum prices declined over the past month but remained higher than the past three months, whereas white sorghum prices increased over the past month but were lower than three months ago. In Rwanda, except Kabuga, all selected markets show lower-stable or low-moderate price increase (4.89% and 14.29%) over the past 1-12 months. South Sudan's current sorghum prices are mostly higher than they were in the past 1-6 months. On the other hand, except Rumbek, current sorghum prices in all selected markets are lower than they were a year ago. Conflicts and insecurity continue to hamper cropping and trading activities in Ethiopia and South Sudan, hence driving up prices.

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
Ethiopia	Sorghum (red)	Addis Ababa, Ethiopian Birr/KG**	26	-3.31	11.24	31.86	91.40
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG**	33	4.66	-12.76	6.86	50.43
Rwanda	Sorghum	Kabuga, Retail, RWF/KG*	600	22.95	21.39	38.65	33.33
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG*	500	-9.09	-9.09	0.00	4.89
Rwanda	Sorghum	Mugera, Retail, RWF/KG*	380	-15.56	-8.98	-1.30	-15.56
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG*	400	-11.11	-5.88	14.29	-16.67
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	156	17.17	76.13	53.81	-35.54
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	398	2.35	11.62	5.45	-2.86
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG**	429	130.77	114.29	100.00	48.07
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	280	1.14	15.06	-0.20	-18.50

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

= 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 (2022) and FAO (2022).
[38] Author's construction based on data from WFP (2022) and FAO (2022).

Southern Africa

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

Weather Shocks	The off-season period and reduced food stocks are contributing to price surges typical in the region in this period. Additionally, tropical storms and droughts have driven speculative price hikes in the region.
Conflicts in Mozambique	The effects of conflicts in parts of Mozambique continue to affect farming and trading activities putting upward pressure on food prices.

In Malawi, maize prices have generally risen above their levels in 1-6 months but were lower than they were a year ago (see table 4). Nonetheless, the national average and Nsanje maize prices show a decline against the past one month and a low (0-5%) increase compared to the past 12 months. The observable surge in prices is mostly due to seasonal changes and speculative price hikes due to the multiple tropical storms that hit Malawi, as well as macroeconomic pressures driving up food inflation. The two selected markets in Mozambique show a decline in maize prices over the past one month, whereas Massinga shows a surge in maize prices over the past 3-12 months, and Maputo shows a lower maize price than it was in the past 3 and 12 months, but higher than it was over 6 months. Prices in Maputo are generally driven by new harvests that have just begun, while insecurity and conflicts continue to restrict agriculture activities and maintaining prices higher than their previous levels.[40] Maize prices in Zambia, however, shows a surge in all selected markets and the national average over the past 1-12 months. This is largely due to seasonal changes in maize harvesting and stocking.

Table 4: Changes in maize prices in selected Southern African Countries[41]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Malawi	Maize (white)	Lilongwe, Retail, MWK/KG**	173	14.03 ↑	28.39 ⊗	44.44 ⊗	-11.11 ↓
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	134	7.20 ↑	32.67 ⊗	21.82 ⊗	-18.29 ⬇
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	173	15.33 ⊗	50.43 ⊗	33.77 ⊗	-3.89 ↘
Malawi	Maize (white)	National Average, Retail, MWK/KG**	188	-1.57 ↘	28.77 ⊗	32.86 ⊗	0.53 ▲
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	210	-7.08 ↓	31.25 ⊗	33.33 ⊗	3.58 ▲
Mozambique	Maize (white)	Maputo, Retail, MZN/KG**	26	-31.58 ⬇	-30.93 ⬇	0.74 ▲	-20.01 ⬇
Mozambique	Maize (white)	Massinga, Retail, MZN/KG**	32	-0.97 ↘	0.82 ▲	107.84 ⊗	5.22 ↑
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG	4	8.74 ↑	47.93 ⊗	47.93 ⊗	17.09 ⊗
Zambia	Maize (white)	Chipata, Retail, ZMW/KG	4	5.13 ↑	42.26 ⊗	33.72 ⊗	14.62 ↑
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG	4	-7.03 ↓	47.97 ⊗	47.97 ⊗	14.99 ↑
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG	4	6.55 ↑	14.18 ↑	18.25 ⊗	2.97 ▲
Zambia	Maize (white)	Mpika, Retail, ZMW/KG	3	59.42 ⊗	6.28 ↑	6.28 ↑	6.28 ↑
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	4	9.20 ↑	25.60 ⊗	23.08 ⊗	6.36 ↑

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

● = 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 5th April 2022
[40] https://fews.net/southern-africa/mozambique
[41] Author's construction based on data from WFP (2022) and FAO (2022).

West Africa

Key drivers of the price movements in West Africa include:

Insecurity & Armed Conflicts

Insecurity and armed conflicts continue to disrupt economic activities in the region, reducing grain availability and causing higher prices.

Economic Shocks

Foreign exchange depreciation and fuel price surges in most countries of the region has caused inflationary pressures on commodity prices in the region.

Maize prices in Cote d'Ivoire have generally spiked over the past 1-12 months, reflecting off-seasonal changes, although this is expected to decline in the next three months (see table 5) due to the arrival of the main maize harvests. Ghana, on the other hand, has experienced lower prices than they were in the past 1-6 months, but these are well above their levels a year ago. Similarly, the lower prices reflect the harvests in the southern part of the country in December and January. Maize prices in Mali have overally risen compared to the past 1-12 months due to the lean season and insecurity, although few markets show a decline or stable prices. Also, current maize prices in Nigeria and Togo are generally higher than they were in 1, 3, and 12 months ago but were mostly lower or unchanged compared to their levels over six months. Armed conflicts and insecurity in parts of Nigeria continue to hamper agriculture and trading activities, while macroeconomic pressures also contribute to rising food prices. Forecasts - only available for Mali - show s sustained price surges in the next 3-6 months.

Table 5: Changes in maize prices in selected West African countries[42]

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*	300	28.00	30.26	7.51	37.14	-16.72	
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	285	10.55	26.61	-7.29	30.85	-0.14	
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	313	-3.42	-3.42	-2.08	71.95		
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	246	-9.74	0.00	-5.94	47.50		
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	341	-3.69	-19.42	-24.28	10.09		
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	222	1.26	-2.83	-26.00	44.30		
Mali	Maize (white)	Ansongo, Retail, XOF/KG	281	2.18	8.08	12.40	40.50	6.28	17.75
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	263	-4.36	5.20	5.20	31.50		
Mali	Maize (white)	Faladié, Retail, XOF/KG	250	0.00	2.04	4.17	42.86	3.53	15.36
Mali	Maize (white)	Gao, Retail, XOF/KG	328	9.33	16.73	45.78	45.78		
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	310	3.33	12.73	3.33	24.00	5.50	17.81
Mali	Maize (white)	Niarela, Retail, XOF/KG	250	0.00	0.00	4.17	42.86	7.84	18.48
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	242	8.30		-10.06	23.06		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	242	11.90	45.49	-3.86	33.23		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	245	23.49	41.36	-3.98	40.92		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG***	230	11.98	-8.00	-4.72	43.03		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	225	15.50	33.33	1.12	26.76		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	300	1.01	20.97	20.00	100.00		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	253	1.20	19.34	0.00	64.29		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	255	5.37	21.43	0.00	41.67		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	261	-2.97	29.21	-1.88	39.57		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	255	2.00	15.91	4.08	63.46		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	350	0.00	40.00	16.67	82.29		

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

[42] Author's construction based on data from WFP (2022) and FAO (2022).

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

Overall, millet prices have shown rising trends over the past 1-12 months in almost all selected West African countries. However, few markets show price declines compared to certain periods. For instance, current millet prices in Batie and Dori in Burkina Faso remain lower than they were in 3 and 6 months ago. Also, in Nigeria, millet prices in Ibadan have been lower than they were in the past 1-6 months, whereas almost all markets, except Maiduguri, show lower prices compared to six months ago. Insecurity, conflicts - particularly Burkina Faso and Niger - as well as high cereal demand, remained key drivers of food inflation in the region.

Table 6: Changes in millet prices in selected West African countries[43]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Burkina Faso	Millet	Batié, Retail, XOF/KG	263	2.73 ▲	-13.77 ⇩	-11.15 ⇩	16.37 ⊗
Burkina Faso	Millet	Bousse, Retail, XOF/KG	281	4.46 ▲	21.12 ⊗	21.12 ⊗	56.98 ⊗
Burkina Faso	Millet	Dori, Retail, XOF/KG	340	2.10 ▲	-3.95 ↘	22.30 ⊗	36.00 ⊗
Burkina Faso	Millet	Faramana, Retail, XOF/KG	234	9.35 ↑	20.62 ⊗	52.94 ⊗	61.38 ⊗
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	300	2.04 ▲	10.29 ↑	35.14 ⊗	30.43 ⊗
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	358	17.76 ⊗	16.61 ⊗	43.78 ⊗	43.78 ⊗
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	261	4.82 ▲	1.56 ▲	6.10 ↑	28.57 ⊗
Burkina Faso	Millet	Titao, Retail, XOF/KG	277	9.06 ↑	8.63 ↑	35.12 ⊗	67.88 ⊗
Mali	Millet	Ansongo, Retail, XOF/KG	325	0.00 ●	25.97 ⊗	35.42 ⊗	41.30 ⊗
Mali	Millet	Badalabougou, Retail, XOF/KG	306	2.00 ▲	20.00 ⊗	39.09 ⊗	36.00 ⊗
Mali	Millet	Faladié, Retail, XOF/KG	300	0.00 ●	25.00 ⊗	42.86 ⊗	50.00 ⊗
Mali	Millet	Gao, Retail, XOF/KG	350	2.04 ▲	26.81 ⊗	32.08 ⊗	32.08 ⊗
Mali	Millet	Kayes Centre, Retail, XOF/KG	338	12.67 ↑	11.18 ↑	14.19 ↑	27.55 ⊗
Mali	Millet	Niarela, Retail, XOF/KG	300	9.09 ↑	17.65 ⊗	50.00 ⊗	50.00 ⊗
Niger	Millet	Abalak, Retail, XOF/KG	371	7.54 ↑	27.93 ⊗	6.00 ↑	20.06 ⊗
Niger	Millet	Bonkaney, Retail, XOF/KG	310	6.90 ↑	3.33 ▲	2.99 ▲	23.02 ⊗
Niger	Millet	Goure, Retail, XOF/KG	357	13.69 ↑	19.00 ⊗	-0.83 ↘	17.05 ⊗
Niger	Millet	Katako, Retail, XOF/KG	314	6.80 ↑	6.80 ↑	1.95 ▲	18.05 ⊗
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	250	-4.58 ↘	-10.71 ⇩	-16.67 ↓	24.07 ⊗
Nigeria	Millet	Kano, Wholesale, Naira/KG**	239	10.40 ↑	29.64 ⊗	-2.51 ↘	30.83 ⊗
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	239	3.58 ▲	32.63 ⊗	-7.54 ⇩	26.38 ⊗
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	258	-2.55 ↘	5.41 ↑	-10.41 ⇩	25.67 ⊗
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	230	8.49 ↑	10.84 ↑	3.95 ▲	29.58 ⊗

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

● = *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 show mixed trends in the West African region. In Mali, sorghum prices have generally increased above their levels in 1-12 months ago, except in Gao, where the prices remained unchanged. Available forecast data shows rising trends in the next 3-6 months. Again, conflicts and insecurity in Mali continue to constrain farming and trading activities resulting in lower outputs and higher prices. In Niger, prices are also higher than they were in 1-12 months ago in almost all selected markets. However, Bonkaney had experienced a 1.37% drop in price over the past one month, while Katako has seen no change in prices compared to the past 1

[43] Author's construction based on data from WFP (2022) and FAO (2022)

month and a drop against the prices in the past six months. Sorghum prices in Nigeria show similar trends as of millet, with Ibadan having lower prices compared to 1-6 months ago. Prices are also lower in almost all selected markets than they were in six months. Sorghum prices in Togo also show mixed trends with current prices being higher in all markets than their one-year levels. Anie has had lower prices than in the past 1 and 6 months but higher than three months ago, whereas Kara has had lower prices compared to the past 1-6 months. All other markets had higher prices than in the past 1-6 months.

Table 7: Changes in sorghum prices in selected West African countries[44]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Mali	Sorghum	Ansongo, Retail, XOF/KG	250	0.00	2.88	11.11	11.11	1.07	4.26
Mali	Sorghum	Badalabougou, Retail, XOF/KG	300	9.09	20.00	50.00	50.00		
Mali	Sorghum	Faladié, Retail, XOF/KG	300	17.19	30.43	50.00	50.00		
Mali	Sorghum	Gao, Retail, XOF/KG	250	0.00	0.00	0.00	0.00	2.22	5.30
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	320	3.90	23.08	25.98	28.00		
Mali	Sorghum	Niarela, Retail, XOF/KG	300	11.52	30.43	50.00	65.75		
Niger	Sorghum	Abalak, Retail, XOF/KG	344	4.56	16.61	3.30	16.61		
Niger	Sorghum	Bonkaney, Retail, XOF/KG	288	-1.37	3.60	1.77	14.29	1.08	7.03
Niger	Sorghum	Goure, Retail, XOF/KG	345	23.21	26.37	8.49	29.70		
Niger	Sorghum	Katako, Retail, XOF/KG	294	0.00	5.00	-8.13	18.07	6.04	14.88
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	259	-1.34	-7.68	-9.30	27.65		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	227	14.64	0.89	-4.95	34.34		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	255	5.72	2.61	-5.34	42.17		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	258	6.58	-7.51	-6.70	24.70		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	218	12.11	13.73	8.75	22.54		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	295	-0.67	7.27	-3.28	40.48		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	245	4.26	11.36	6.52	37.64		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	275	-0.36	-1.79	-14.06	4.96		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	247	0.00	7.39	7.39	23.50		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	320	1.59	1.59	10.34	7.74		

*Note: Last price is for February 2022, *March, **January, ***December and ****November*

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

[44] Author's construction based on data from WFP (2022) and FAO (2022)

Climatic Conditions and Potential Implications for Food and Nutrition Security

The April-May-June (AMJ) seasonal rainfall forecast show above-normal rainfall conditions in cross-border areas of Ethiopia-Kenya-Uganda-South Sudan, Djibouti, central Rwanda and southern Tanzania (Figure 11 and FSNWG March Edition)[45]. However, much of Kenya, Rwanda, South Sudan, and Tanzania are projected to receive near-normal conditions. In contrast, drier than usual conditions are expected in north-eastern Kenya and south-western Somalia. The region has experienced consecutive below-average rainfall conditions (quantity and distribution), leading to adverse performance of the cropping and livestock systems in the affected countries covering southern and south-eastern Ethiopia, northern Kenya, southern and north-western Somalia and parts of Uganda. The persistent drought conditions and their interaction with other shocks such as macro-economic shocks, the COVID-19 pandemic, and violent conflict in some areas are significantly affecting the food and nutrition security of the populations in the affected areas. For example, the FSNWG March Edition highlights that drought-affected areas in the regions have recently experienced increased incidences of climate and conflict-induced displacement that further adversely impact food systems and food trade activities, and worsen the food and nutrition security.

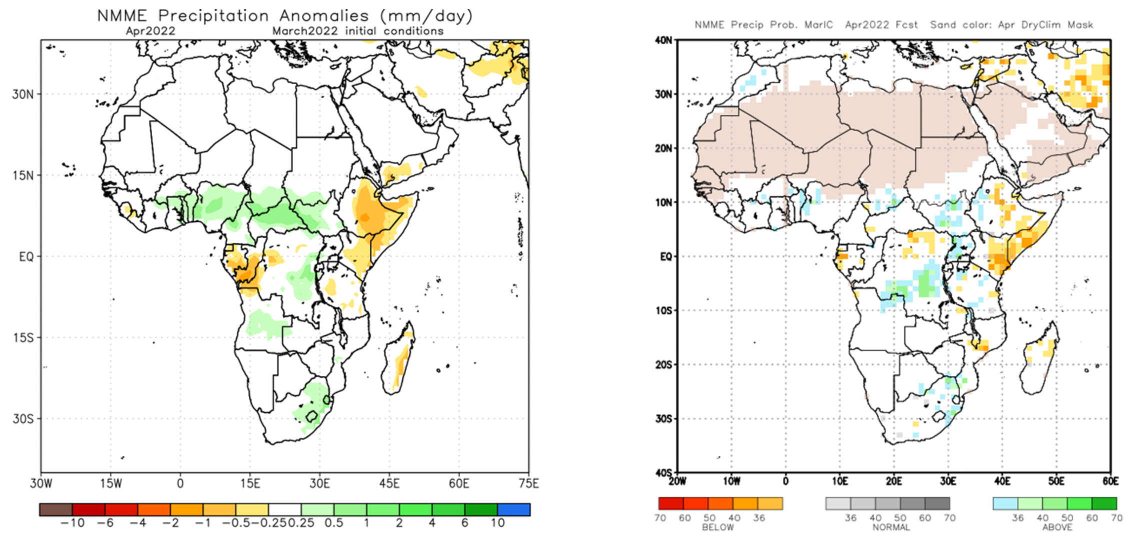


Figure 10: North American Multi-Model Ensemble (NMME) rainfall forecast for March 2022 based on February 2022 initial conditions[46]

In Southern Africa, harvesting is ongoing for the main cropping season crops. The region's monthly and seasonal AMJ rainfall forecasts show mixed results, with pockets of above-average rainfall in parts of Malawi, Mozambique, and South Africa. The tropical storms such as Ana and Gombe that recently hit Malawi and Mozambique have significantly contributed to above-normal rainfall in the affected areas. These have also affected cropping activities that are expected to reduce seasonal harvests and food supplies in the respective areas and the region. In other areas where rainfall conditions remained below-average compared to the above-normal conditions projected at the end of last year (such as southern parts of Zimbabwe), seasonal harvests are expected to be below-average. The reduced forecasts on food supplies, coupled with the ongoing global

[45] https://mcusercontent.com/9206ea93bb8c6f35f98cc8ccf/files/dc62b237-d006-3b38-2bc3-0c38fab07ef1/Presentations_FSNWG_Meeting_31.03.2022.pdf. Accessed 4 April 2022.

[46] 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 2 April 2022.

food supply chain disruptions induced by the Russia-Ukraine war, point to the need for strengthened efforts to improve food trade to ensure areas of deficits have adequate food supplies.

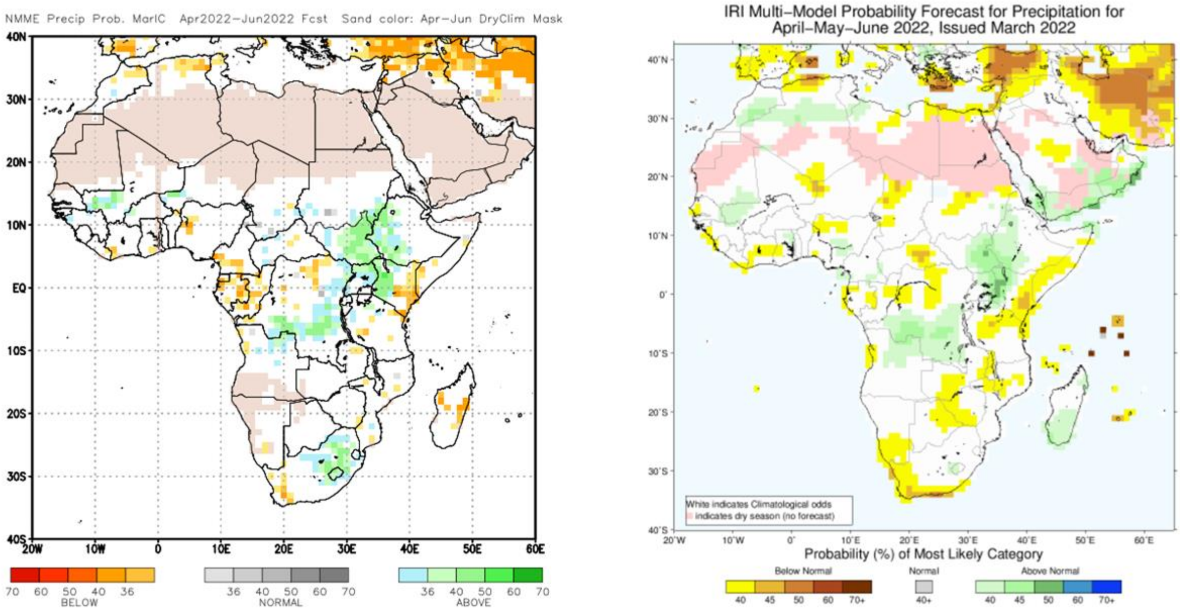


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for the March-May 2022, based on February 2022 initial conditions[47]

Compared to the previous edition, for West Africa, the AMJ rainfall forecast indicates mainly below-average conditions with small pockets of above-normal rainfall conditions. The planting season is expected to start in the region, although more rainfall to ensure successful planting operations is required.

[47] 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 2 April 2022.

For more information contact:

Food Trade Unit, Policy and State Capability (PSC) Division
E-mail: foodtrade@agra.org

AGRA
Growing Africa's Agriculture

Alliance for a Green Revolution in Africa (AGRA)
West End Towers, 4th Floor
Muthangari Drive, off Waiyaki Way, Nairobi, Kenya
PO Box 66773, Westlands 00800, Nairobi, Kenya

WWW.AGRA.ORG