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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

EDITION **25**

May 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, 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.

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 May Food Security Monitor are summarised below.

Global Food and Commodity Price Crisis

- The Africa Finance Corporation (AFC) is launching a US$2 billion facility to support recovery and resilience in Africa. The facility will be disbursed through loans from AFC to selected commercial banks, providing them with hard currency liquidity to finance trade and other economic activities.
- The Africa Development Bank's group of directors approved a US$1.5 billion Emergency Food Production Facility to help African countries avert the looming food crisis. The facility will provide 20 million African smallholder farmers with certified seeds.

Food Security Outlook

The food insecurity hotspots in May 2022 were South Sudan, Burkina Faso, Mali and Niger.

Macroeconomic shocks linked to foreign exchange shortages, high fuel prices, economic contraction and other factors are exacerbating food insecurity in several countries in East Africa driving staple food, fuel, and water prices higher.

In Southern Africa, a below-average harvest and worsening macro-economic conditions across the region will severely limit post-harvest improvements.

In West Africa, new price records expected in the Sahel during the lean season will continue to limit the access to food by poor households.

Food Trade

The UK government through its development finance and impact investor, British International Investment, has signed a US$ 100 million risk-sharing facility for supply chain finance with Citi to provide systemic liquidity and help Citi grow its supply chain finance product across Africa. The facility will target SME suppliers and underserved and excluded businesses.

In East Africa, the East African Community (EAC) ministers / cabinet secretaries in charge of trade and finance have adopted 35 percent as the fourth Band of the EAC Common External Tariff (CET).

In Southern Africa, the Economic Commission for Africa (ECA), Sub-Regional Office for Southern Africa (SRO-SA), in collaboration with the Common Market for Eastern and Southern Africa (COMESA), together with Zambia and Zimbabwe's Permanent Secretaries (PS) of Commerce and Industry held a two-day high-level meeting to discuss the implementation of a common agro-industrial park (CAIP) between the two countries.

In West Africa, Togo opened its land border with Ghana 50 days after the latter opened its land borders with its neighbouring countries.

Commodity Prices

Over the last month, the Grains and Oilseeds Index (GOI) rose marginally by six points from 354 to 360. Rice, wheat, and soyabean prices also rose marginally. Maize prices, however, dipped from about 363 to 350. The FAO food price index shows similar trends with cereal prices dropping over March and April.

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).

Global food and commodity price crisis

As global wheat prices continue to surge, consumers in some African countries – namely, Kenya, Egypt, Democratic Republic of Congo, Nigeria and Cameroon - are beginning to diversify their grain diets. Food producers in these countries are mixing cheaper alternatives into pastries, bread and pastas. There is also growing wheat substitution with local rice, manioc flour and sorghum as wheat prices have increased by more than 40 percent since the global food and commodity price crisis[1]. In addition, and as wheat supplies from the Black Sea continue to fall, African countries are beginning to turn to Argentina as an alternative source of wheat. The Global Trade Tracker reports that Cote d'Ivoire, Kenya, Nigeria, Rwanda, Senegal and South Africa are set to receive 147,200t of wheat from Argentina[2]. This is a 33 percent increase from last year. This has been further necessitated by the recent wheat export ban by India, which had emerged as an alternative source for wheat supplies. The India ban has been occasioned by a severe heatwave that hit the country mid-March 2022 leading to a decrease in wheat production forecasts.

Below are recent updates on measures and responses that various governments and organisations in Africa have put in place to mitigate the impacts of the global food and commodity price crisis on their food systems and food security.

- **Africa Finance Corporation**: The AFC is launching a US$2 billion facility to support recovery and resilience in Africa. The facility will be disbursed through loans from the AFC to selected commercial banks, regional development banks and central banks in various African countries, providing them with much-needed hard currency liquidity to finance trade and other economic activities in their jurisdictions[3].

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[1] https://www.herald.co.zw/africa-pivots-to-cheaper-wheat-alternatives/
[2] https://www.argusmedia.com/en/news/2331441-subsaharan-africa-turns-to-argentinian-wheat
[3] https://www.africafc.org/news-and-insights/news/africa-finance-corporation-launches-us-2bn-facility-to-support-economic-recovery-resilience-in-africa

- **African Development Bank**: The AfDB's group of directors approved a US$1.5 billion Emergency Food Production Facility to help African countries avert the looming food crisis. The facility will provide 20 million African smallholder farmers with certified seeds. It will also increase access to agricultural fertilizers and enable them to rapidly produce 38 million tons of food[4].
- **Burkina Faso**: The government has put a ban on exports of all staple crops. On the 18th of May, the government adopted a 2022 Response and Support Plan for Vulnerable Populations against Food Insecurity and Malnutrition (PRSPV-2022) with a budget of 238 billion CFA ($396 million), which will be financed by the government, technical and financial partners, and communities. The government has also supplied 500 tractors at a 50% subsidy to farmers to boost production.
- **Tanzania**: The government has put in place several measures aimed at increasing the supply of fertilisers, including:
    - Removal of the bulk procurement scheme and opening of the fertilizer import business to anyone who can import fertilizer;
    - Plans by the ministry of agriculture to introduce subsidies that will make fertilizer affordable to farmers, and
    - The removal of fertilizer price caps/indicative prices requirements, giving more incentives to private companies to import and trade in fertilizers.
- The government has also put a subsidy on petroleum products (petrol – 9.3%; diesel – 9.3%) effective 1 July 2022
- **Zambia**: The government of the Republic of Zambia has not announced any specific measures aimed at mitigating the impact of the RUC, but it has implemented an export quota for soybeans. It (the government) also announced that it is monitoring the impact of the conflict particularly on the agri-food and energy sectors.
- **Uganda**: The Ugandan government says it will continue to support farmers to grow vegetables and grains such as wheat and corn. It has also partnered with 40,000 farmers in northern Uganda to grow sunflowers and soybeans for the production of cooking oil.
- **Ghana**: the government has extended its temporary export ban for rice, maize and soybeans for an additional six months up to the 30th of September 2022.

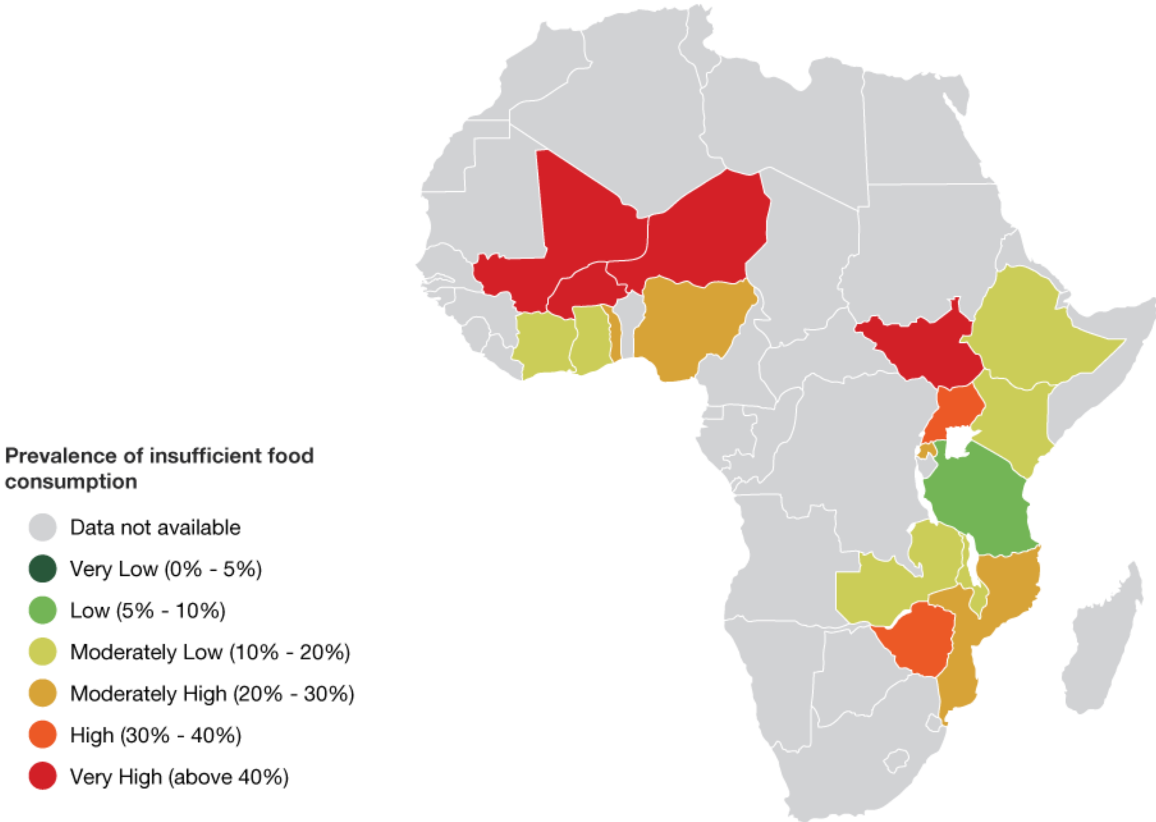
[4] https://www.afdb.org/en/news-and-events/press-releases/african-development-bank-board-approves-15-billion-facility-avert-food-crisis-51716

Food Security Outlook

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 May. During the month of April, 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. This includes South Sudan (57.3%), Burkina Faso (53.0%), Mali (57.6%) and Niger (69.6%).

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



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

East Africa

As of 30 May 2022, 58.2 million people across six selected East African countries did not have sufficient food for consumption. This represents an 8.3 percent decrease from April 2022, indicating that the food security situation improved across these focus countries during the reporting period. Table 1 provides updates on how the prevalence of insufficient food consumption changed across each of the selected East African countries during the month.

The number of people with insufficient food for consumption did not change in Tanzania and South Sudan during the month. However, the prevalence of insufficient food for consumption remained very high (57.3 percent) in South Sudan, and low (9.4 percent) in Tanzania.

[5] https://hungermap.wfp.org/ Accessed 30 May 2022
[6] https://hungermap.wfp.org/. Accessed 30 May 2022

Table 1: Prevalence of insufficient food consumption across selected East African countries (May 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 (%)
Rwanda	12.30	2.80	2.90	23.58	3.57	2.30	38.30
Ethiopia	109.20	26.30	21.00	19.23	-20.15	7.20	36.80
Tanzania	56.30	5.30	5.30	9.41	0.00	3.50	31.80
South Sudan	11.00	6.30	6.30	57.27	0.00	22.70	31.30
Uganda	42.70	16.30	16.10	37.70	-1.23	3.50	28.90
Kenya	51.40	6.50	6.60	12.84	1.54	4.20	26.20

*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%)

Southern Africa

As of 30 May 2022, the number of people with insufficient food for consumption across four selected countries in Southern Africa stood at 18.3 million. This represents a 7.6 percent decrease from April 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 the month.

While the overall number of people with insufficient food for consumption decreased across the selected countries, Zimbabwe (2 percent) and Malawi (7 percent) recorded increases in the number of people without sufficient food for consumption during the month.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (May 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 (%)
Mozambique	29.50	9.80	8.50	28.81	-13.27	4.40	42.30
Malawi	18.10	2.60	2.80	15.47	7.69	1.30	39.00
Zambia	17.40	2.60	2.10	12.07	-19.23	4.20	34.60
Zimbabwe	14.40	4.80	4.90	34.03	2.08	2.90	23.50

*Previous month and ** Current month

= no change; = low increase (0-10%), = moderate increase (10-30%), = high increase (>30%), = 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 103.3 million as of 30 May 2022. This was a 2.6 percent decrease from the previous month, suggesting that the region's food security situation improved 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 the month.

Mali, Burkina Faso and Togo did not recorded any changes in the number of people with insufficient food for consumption during the month with the prevalence levels remaining very high in both Burkina Faso (53.0 percent) and Mali (57.6 percent).

[7] https://hungermap.wfp.org/ Accessed 30 May 2022
[8] https://hungermap.wfp.org/ Accessed 30 May 2022

Table 3: Prevalence of insufficient food consumption in selected West African countries (May 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 (%)
Niger	22.40	15.20	15.60	69.64	2.63	↑	14.10	48.50
Nigeria	202.80	56.30	53.50	26.38	-4.97	↓	6.80	36.80
Mali	19.10	11.00	11.00	57.59	0.00	●	9.00	26.90
Burkina Faso	19.80	10.50	10.50	53.03	0.00	●	8.40	24.90
Togo	7.90	2.10	2.10	26.58	0.00	●	5.70	23.80
Cote d'Ivoire	25.10	5.30	4.70	18.73	-11.32	↘	6.10	21.60
Ghana	29.80	5.70	5.90	19.80	3.51	↑	6.80	17.50

**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%)

East Africa Food Security Outlook

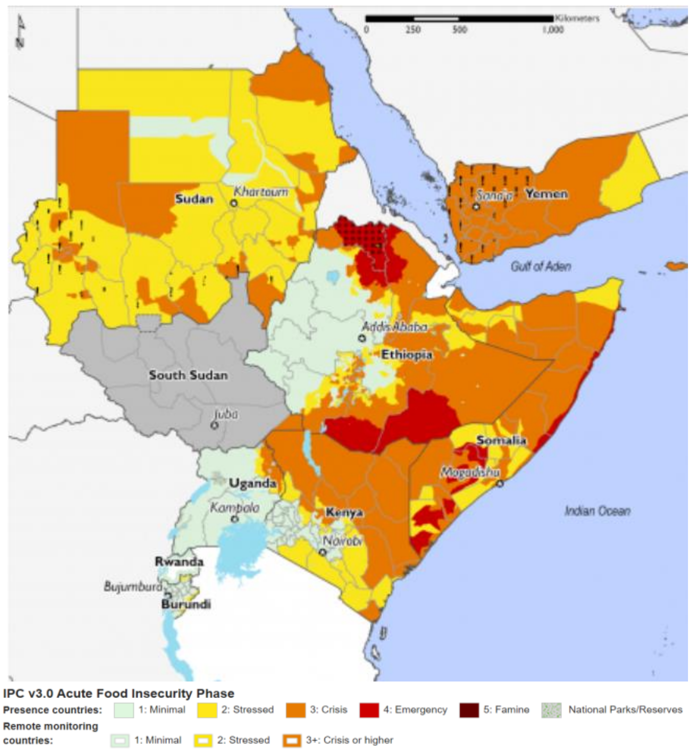


Figure 3: East Africa countries Food Security Outlook, Feb - May 2022

The region continues to experience a predominantly IPC Phase 3 (Crisis) situation driven by conflict, weather and economic shocks. Macroeconomic shocks linked to foreign exchange shortages, high fuel prices, economic contraction and other factors are exacerbating food insecurity in several countries by driving up staple food, fuel, and water prices[10].

Kenya: The country's Food Balance Sheet projections until the end of July 2022 shows that the country has a surplus of 4.7 million bags of maize based on: 1) an estimated 600,000 bags imported from the EAC by the private sector; 2) 6 million bags sourced duty free from outside EAC and COMESA following the gazettement of duty-free imports, and 3) early long rains harvests about 3 million (90 kg) bags[11] in some counties.

Ethiopia: The UN Office for the Coordination of Humanitarian Affairs (OCHA) reports that approximately 26,500 MT of food has been brought into Tigray by the main food partners through the 11 humanitarian convoys that arrived between 01 April and 23 May. This is helping to improve the food security situation in the conflict-affected region of the country. Overall, an estmated 10-15 million people in Ethiopia are currently in need of humanitarian assistance driven by ongoing insecurity and climate shocks that are likely to result in continued high needs into 2023[12].

Uganda: Late harvests and above-average market prices are limiting food access nationwide. The country is expected to record below-average harvests in June/July due to the late start of the season in most areas and a series of dry spells. The projected below-average harvests will lead to atypically high prices of food, non-food

[9] https://hungermap.wfp.org/ Accessed 30 May 2022
[10] Food Security and Nutrition Working Group
[11] Weekly Food Security Monitoring Committee Report (Ministry of Agriculture, Livestock, Fisheries, and Cooperatives)
[12] https://reliefweb.int/report/ethiopia/ethiopia-food-security-alert-may-27-2022

commodities, and essential services like education and transportation for many poor households in the eastern and northern bimodal areas leading to IPC Phase 2 (Stressed) outcomes[13].

Rwanda: Harvests of fast-maturing vegetable crops from season B continue to increase food availability in most rural areas resulting in IPC Phase 1 (Minimal) outcomes. These outcomes are expected to persist from June to September. IPC Phase 2 (Stressed) outcomes have been experienced among some rural households during the April-May lean season driven by the atypically high food prices[14].

South Sudan: The continued macroeconomic crisis and depreciation of local currency has resulted in the loss of livelihoods, sreduced incomes and increases in food prices leaving most low-income households with difficultities in accessing food from markets. The deteriorating security situation which is leading to dispalcements has resulted in the loss of assests and livelihoods further reducing the purchasing power for the majority of low-income households[15].

Southern Africa Food Security Outlook

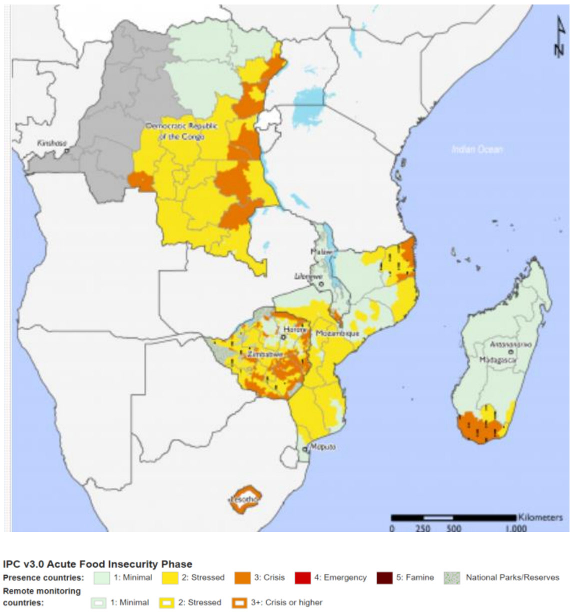


Figure 4: Southern Africa countries Food Security Outlook, October 2021 - January 2022

A below-average harvest and worsening macro-economic conditions across the region will severely limit post-harvest improvements.

Malawi: The country is expected to record below-average harvests this year due to poor rainfall performance, multiple tropical storms, and limited access to agricultural inputs, according to reports from the Ministry of Agriculture and Food Security. Worsening macroeconomic conditions, characterised by low foreign reserves due to below average production of the country's key cash and export crops namely tobacco and cotton, are increasing inflationary pressure and pushing commodity prices up[16].

Mozambique: The ongoing harvests in the country have improved the access to food resulting in most low-income rural areas registering IPC Phase 1 (Minimal) outcomes. However, the Southern parts of the country and the central and northern regions, which were affected by droughts and tropical cyclones, respectively experienced IPC Phase 2 (Stressed) outcomes. The below-average crop harvests due to these multiple climatic shocks have resulted in the reduced availability of staple foods in most local markets leading to a surge in commodity prices and reducing the purchasing power for most households[17].

Zimbabwe: Despite the harvesting of early crops beginning, IPC Phase 3 (Crisis) outcomes still persist across the country's deficit producing regions, which were affected by delayed crop plantings and below-normal seasonal performance. Surplus-producing regions are projected to continue experiencing IPC Phase 1 (Minimal) outcomes sustained by reserves from the above-average harvest from the previous season and this year's harvests. Urban areas are expected to continue experiencing IPC Phase 2 (Stressed) outcomes as ongoing macroeconomic challenges, compounded by increasing prices of basic food, fuel, and fertilizers, as well as disruptions in global supply chains, which continue to negatively impact low-income households in both rural and urban areas[18].

[13] https://reliefweb.int/report/uganda/uganda-key-message-update-late-harvests-and-above-average-market-prices-limiting-food-access-nationwide-may-2022
[14] https://reliefweb.int/report/rwanda/rwanda-key-message-update-rising-food-prices-constrain-access-food-some-households-may-2022
[15] Food Security and Nutrition Working Group.
[16] https://reliefweb.int/report/malawi/malawi-key-message-update-below-average-harvest-and-worsening-macro-economic-conditions-severely-limit-post-harvest-improvements-may-2022
[17] https://reliefweb.int/report/mozambique/mozambique-key-message-update-idps-begin-returning-their-areas-origin-needs-remain-high-may-20220020
[18] https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-outlook-update-april-2022

West Africa Food Security Outlook

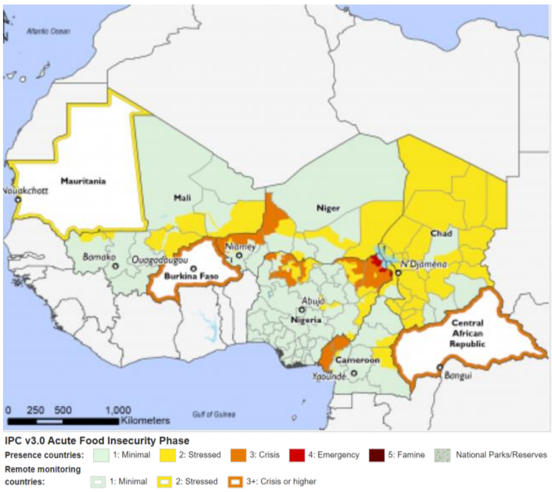


Figure 5: West Africa countries Food Security Outlook, Feb - May 2022

New price records expected in the Sahel during the lean season will further limit poor households' access to food. Commodity prices continue to rise across the region remaining above the five-year average[19].

Burkina Faso: Despite the favourable agro-hydro-climatic seasonal forecasts which show abundant forecast rainfall, the country's agricultural campaign remains at risk due to delays and in accessing sufficient quantities of industrial fertilizers (NPK and Urea), due to the impact of the global food and commodity price crisis. Disruptions and displacements in rural communities as a result of ongoing security attacks continue to deprive rural households access to food supplies and their livelihoods resulting in IPC Phase 3 (Crisis) and Phase 4 (Emergency) outcomes[20].

Mali: Average off-season harvests - currently underway in the irrigated areas of Ségou, Koulikoro, Mopti, Gao and Timbuktu - are improving food security outcomes in these areas. However, cereal production and supplies, which have generally declined across the country, particularly in the insecure areas of the country, have led to a decline in the trade of cereals resulting in prices rising by more than 30 percent above the five-year average. This has led these insecure areas to experience IPC Phase 3 (Crisis) outcomes[21].

Niger: Rising security incidents and prices continue to limit household food access in the far west, far south-east and south-central parts of the country. The prevailing food insecurity in the country is Stressed (IPC Phase 2) with a higher level of Crisis (IPC Phase 3) prevailing in the Tillabéry region and North Tahoua. Food prices continue to surge surpassing the five-year average by between 25 and 30 percent. Imported food products, particular vegetable oil, dairy products, wheat and its by-products, are also experiencing a general increase of 50 percent and more following the decline in their availability related to the Ukrainian crisis, which is disrupting the functioning of international commercial circuits[22].

Nigeria: The ongoing dry season harvest has generally been below-average, affected by low access to land and agricultural inputs and damage by elephants, particularly in the Gamboru, Dikwa, and Kala Balge local government areas. This has pushed prices up resulting in many households facing difficulties in accessing food due to the deteriorating purchasing power. Macroeconomic conditions continue to worsen as foreign exchange remains in short supply leading to inflationary pressure, which saw the country record a 16.82 percent inflation rate in April 2022, the highest since August 2021[23].

[19] https://fews.net/west-africa
[20] https://reliefweb.int/report/burkina-faso/burkina-faso-key-message-update-lascension-des-prix-des-produits-se-poursuit-et-sintensifie-avec-la-recente-hausse-record-du-prix-du-carburant-mai-2022
[21] https://reliefweb.int/report/mali/mali-key-message-update-difficultes-dacces-des-menages-aux-vivres-cause-des-prix-eleves-des-aliments-mai-2022
[22] https://reliefweb.int/report/niger/niger-key-message-update-la-hausse-des-incidents-securitaires-et-des-prix-limite-lacces-alimentaire-aux-menages-mai-2022
[23] https://fews.net/west-africa/nigeria

Food Trade Updates

Continental Trade

The following are some of the major events and activities that occurred during the month, and have implications on food trade at the continental level in Africa.

- The Enhancement of Governance and Enabling Environment in the ICT sector programme, an 8 million Euro project with funding from the European Union, was launched May 12. The programme will support five Regional Economic Communities - COMESA, EAC, IGAD, IOC and SADC - with review and/or development of various regional policy and regulatory frameworks in a harmonized manner contributing to enhanced competition, and improved access to cost-effective and secure ICT services[24].
- The UK government, through its development finance and impact investor, British International Investment, has signed a US$100-million risk-sharing facility for supply chain finance with Citi to provide systemic liquidity and help Citi grow its supply chain finance product across Africa. The facility will target SME suppliers and underserved and excluded businesses helping them better manage cash flow and onboard new suppliers to the supply chain, ensuring the continued flow of goods and services[25].
- The Economic Commission for Africa (ECA) and the African Export-Import Bank (Afreximbank), in collaboration with the African Union and the AfCFTA Secretariat launched the Africa Trade Exchange (ATEX), a business-to-business (B2B) e-commerce platform, during the official opening of the 54th Conference of African Ministers of Finance, Planning, and Economic Development (CoM2022) on May 16, in Dakar, Senegal. ATEX will serve as a B2B and business-to-government (B2G) digital marketplace that will enable the pooled procurement of basic commodities to ensure countries have access to scarce supplies in a transparent manner[26].

East Africa

The East African Community (EAC) ministers / cabinet secretaries in charge of trade and finance have adopted 35 percent as the fourth Band of the EAC Common External Tariff (CET). The decision was taken during the ministers; retreat on the comprehensive review of the CET, held on May 5, 2022, in Mombasa, Kenya. The CET, which comes into effect from July 1, 2022 includes dairy and meat products, cereals, cotton and textiles, iron and steel, edible oils, and beverages and spirits. Additional products include: furniture, leather products, fresh-cut flowers, fruits and nuts, sugar and confectionery, coffee, tea and spices, textiles and garments, head gears, ceramic products and paints, among others[27].

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.

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[24] https://www.comesa.int/regional-ict-programme-worth-e8-million-launched/
[25] https://it-online.co.za/2022/05/18/100m-facility-aims-to-unlock-african-supply-chain-finance/
[26] https://www.ghanabusinessnews.com/2022/05/22/eca-launches-africa-trade-exchange-platform-to-facilitate-trading-under-afcfta/
[27] https://www.eac.int/press-releases/157-trade/2424-eac-ministers-adopt-35-as-the-eac-cet-4th-band

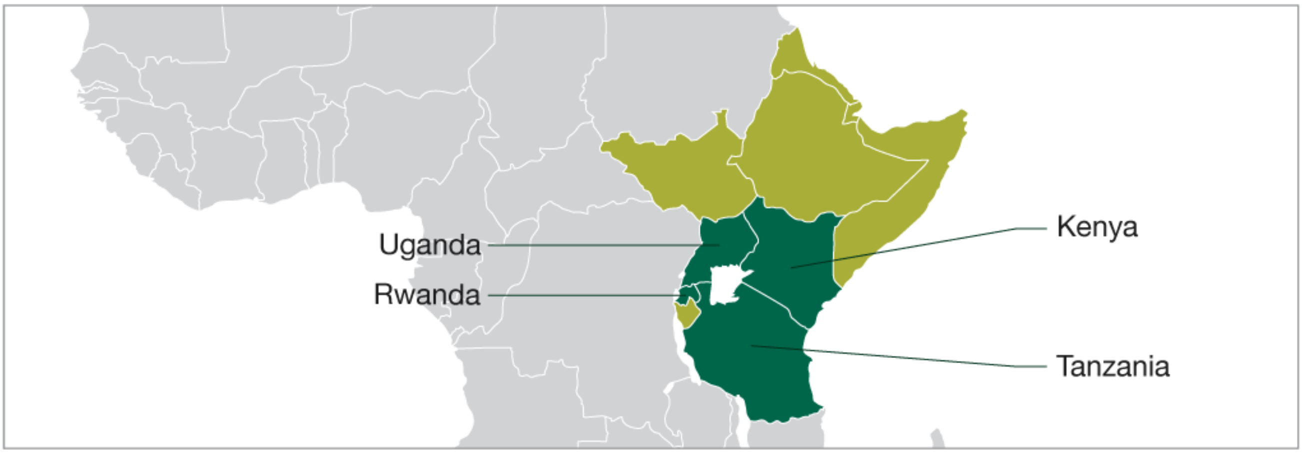


Figure 6: East Africa Cross border trade updates May 2022

KENYA

- The reduction of non-tariff barriers and solutions to bi-lateral issues with Tanzania has resulted in increased trade between Kenya and Tanzania with recent data from the Kenya National Bureau of Statistics Economic Survey 2022 showing that Tanzania's exports to Kenya doubled in just 10 months.
- Data from the Kenya National Bureau of Statistics (KNBS) shows that the Sugar Directorate exceeded the sugar import limits set by the National Treasury last year by 102 percent despite a significant increase in production of the commodity. The Treasury has cut the amount of sugar that can be imported tax-free from COMESA by a third following an outcry by local farmers.
- To mitigate an increase in flour prices, the Kenyan government is planning to allow maize imports from outside the East African Community. The move is expected to force farmers hoarding maize to release their supply to the market.
- The government waved a 50 percent duty levied on maize outside the East African region and allowed millers and traders to ship in 540,000 tonnes in order to check the current high prices of flour.
- The KSh7.5 billion (USD 65m) infrastructural upgrade of the Moi International Airport, which includes the cargo terminal, cold room, and replacement of the airfield, ground lighting systems, and approaching lighting masts with fiberglass from the traditional steel, has reportedly led to the increased export of fresh produce.
- Maize millers have snubbed maize imports on the back of high landing costs and a shorter window provided for shipping the commodity. Processors argue that currently, they can only get good stocks of non-Genetically Modified Organism (non-GMO) maize from Mexico, which will take at least 45 days for the first consignment to arrive after orders have been placed.

TANZANIA

- The Tanzanian government announced that it will resume the buying sugar from Uganda after a three-year ban which was instituted after allegations that that the imports originated from third-party countries.
- Tanzania has agreed to cut a road toll on Uganda-bound cargo trucks by about 71 percent as part of a consensus reached during a meeting by leaders of the two countries. Ugandan cargo trucks were being charged USD 500 in Tanzania for road repairs and maintenance.
- Recent statistics show that Tanzania has become the largest source market for Kenya on the continent after overtaking South Africa, partly on the back of increased orders of maize and rice by millers.

UGANDA

- Ugandan exporters and manufacturers are reporting an increase in several tariff and non-tariff barriers since the border with Rwanda opened, and manufacturers are grappling with re-establishing supply chains in Kigali.
- The Private Sector Foundation Uganda representing private sector business associations in partnership with Government of Uganda will hold the first ever Uganda- DR Congo Business Summit between May 31 and June 8 in Kinshasa and Goma located in the Democratic Republic of Congo.

RWANDA

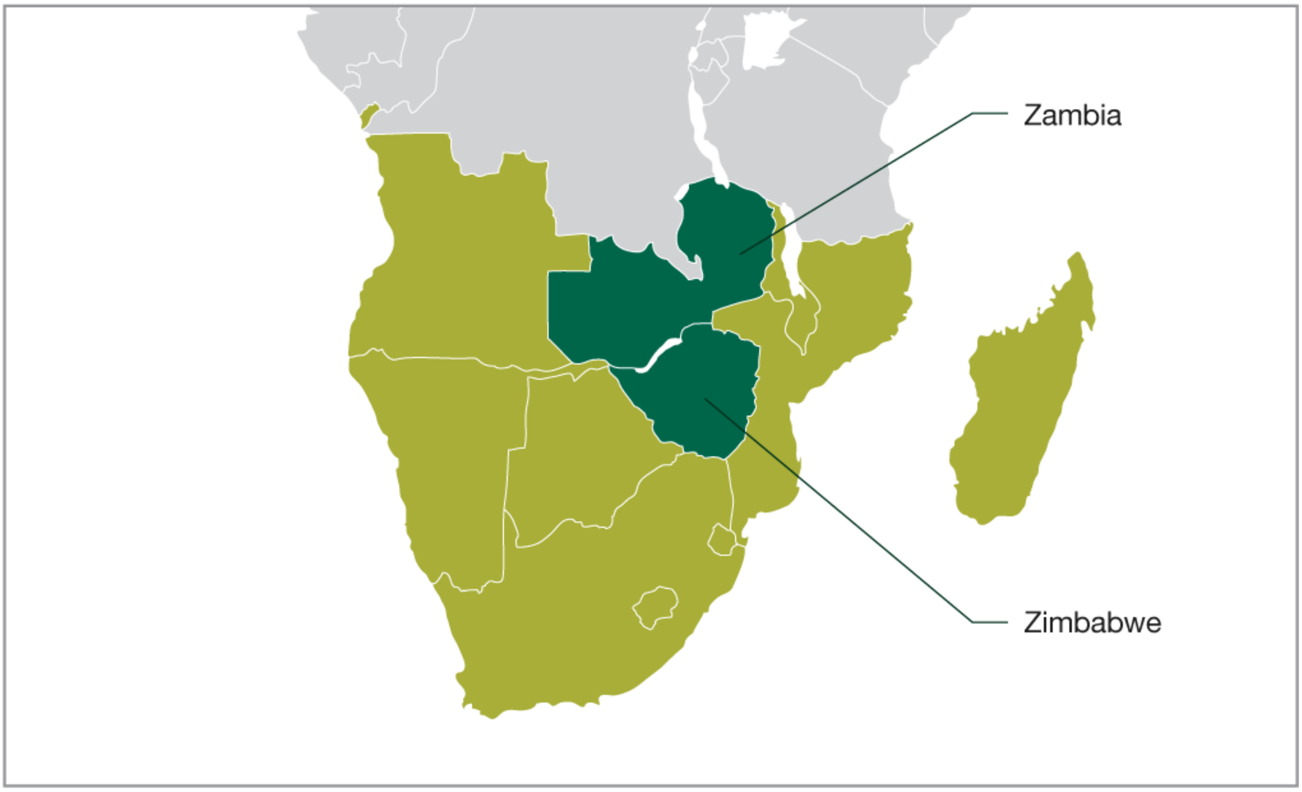
- The Deputy Secretary General of East African Community (EAC) has urged the Rwandan private sector to leverage opportunities available in the region, by improving the standards of their products as a way of expanding their businesses and increasing revenues on the regional and global markets.
- Rwanda has unveiled an additional $150 million in funding for businesses to stimulate growth and mitigate the prolonged impact of the coronavirus pandemic on the economy. The funds, drawn from its $250 million Economic Recovery Fund launched in June 2021, have been earmarked for the private sector, specifically manufacturing.
- Four months after opening its border with Uganda, Rwanda says it is reviewing its trade list with the country before its goods can be allowed on its market. Rwanda says the review is necessary because it wants to enforce quality as well as protect local manufacturers, who had started producing some goods that were previously imported from Uganda.

Southern Africa

The Economic Commission for Africa (ECA), Sub-Regional Office for Southern Africa (SRO-SA), in collaboration with the Common Market for Eastern and Southern Africa (COMESA) with Permanent Secretaries (PS) of Commerce and Industry from Zambia and Zimbabwe held a two-day high-level meeting to discuss the implementation of a common agro-industrial park (CAIP) between the two countries. The objective of the meeting was to update the two Permanent Secretaries on the progress on the implementation of the industrial cooperation programme between the two countries focusing on the common agro-industrial park; discuss the funding opportunities for activities in the park; propose a possible location of the park; review the draft harmonized policy, legal, regulatory, and institutional framework for the park and agree on a roadmap for the initiative's subsequent phase[28].

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 May 2022



ZIMBABWE

- The Zimbabwe government has suspended for the next six months its import duty on basic commodities in a move meant to counter escalating and unjustified price increases of locally-manufactured products.
- To cushion consumers, rice, flour, cooking oil, margarine, salt, sugar, maize meal, milk powder, infant milk formula, tea (whether flavoured or not), petroleum jelly, toothpaste, bath soap, laundry bar, and washing powder will now be imported duty free.

ZAMBIA

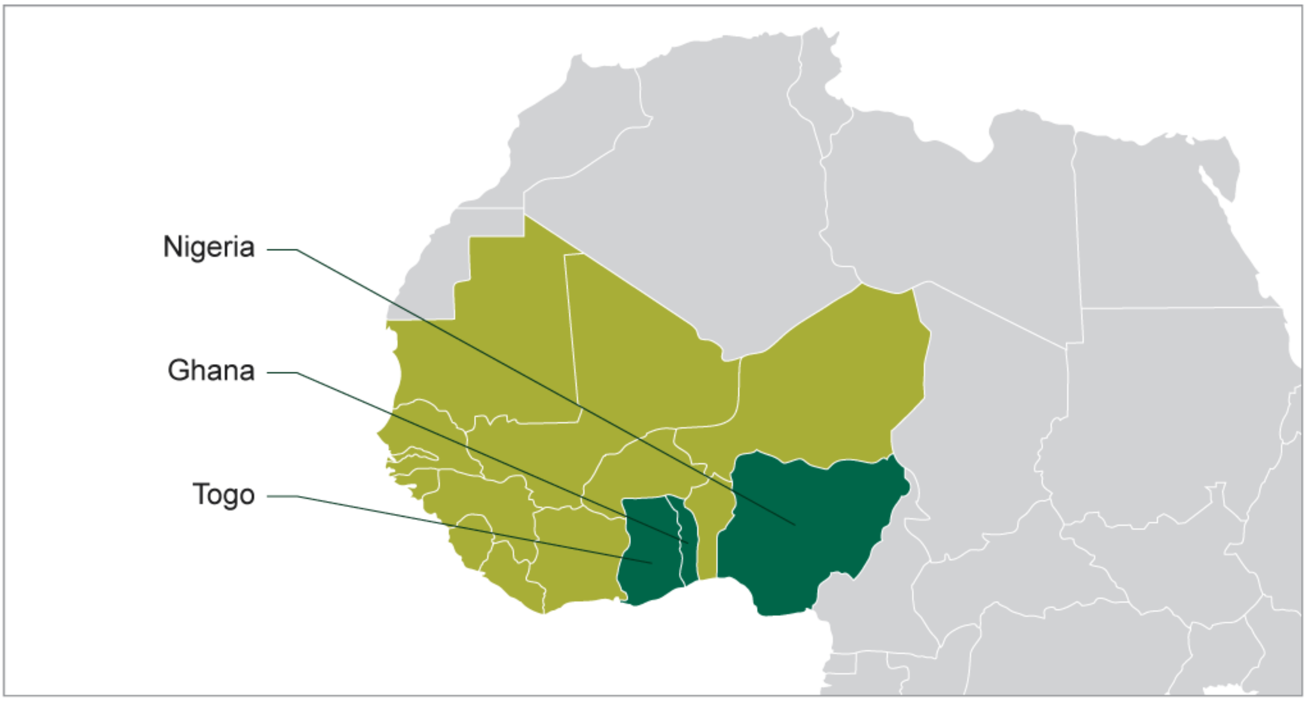
- The US$6.8 million European Union (EU)-funded Zambia Border Post Upgrading Project (ZBPUP) infrastructure upgrade is expected to enhance trade, reduce smuggling and contribute to increased revenue collections.
- The programme will provide grants to support trade facilitation activities, specifically the upgrading of soft border infrastructure at the Chirundu, Mwami and Nakonde border posts.

[28] https://www.uneca.org/stories/commerce-and-industry-permanent-secretaries-from-zambia-and-zimbabwe-with-development

West Africa

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

Figure 8: West Africa Cross Border Trade Updates May 2022[29]



NIGERIA

- The national action committee on the African Continental Free Trade Area (AfCFTA) says it has commenced the development of policies in collaboration with relevant export agencies for the free flow of trade in Nigeria. The policies are expected to synergise the ministries, departments, and agencies (MDAs) that have a role in supporting the growth of trade in the country.

TOGO

- Togo opened its land border with Ghana 50 days after the latter opened its land borders with its neighbouring countries.

GHANA

- The President has bemoaned the shortage of fertiliser for agricultural production in the country, which is leading to a surge in food prices and is also beginning to affect the availability of maize and soya for the poultry industry.
- Ghana and Mozambique on Monday signed a joint permanent cooperation agreement to boost cooperation between the two countries. The two countries are looking to collaborate in the areas of agriculture, tourism, oil and gas, energy, education, trade and industry, environment, science and technology.
- The Ministry of Agriculture has hinted that the country's law on grain exports will be amended soon to reduce the illegal exports of grain, namely soybean, which has seen 50% of poultry farms collapsing across the country.

[29] 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

Over the last month, the Grains and Oilseeds Index (GOI) rose only marginally by six points from 354 to 360. Similarly, rice, wheat, and soyabeans rose marginally. Maize prices, however, dipped from about 363 to 350. The FAO food price index shows similar trends with cereal prices showing downward trends over March and April. Although the production outlook seems responsive to the global high prices, export restrictions in many countries puts future the recovery of food prices in jeopardy. Fertilizer prices for most types continue to increase. The World Bank Commodities Price data shows increases in prices in April over March for all kinds of fertilizer except potassium chloride.

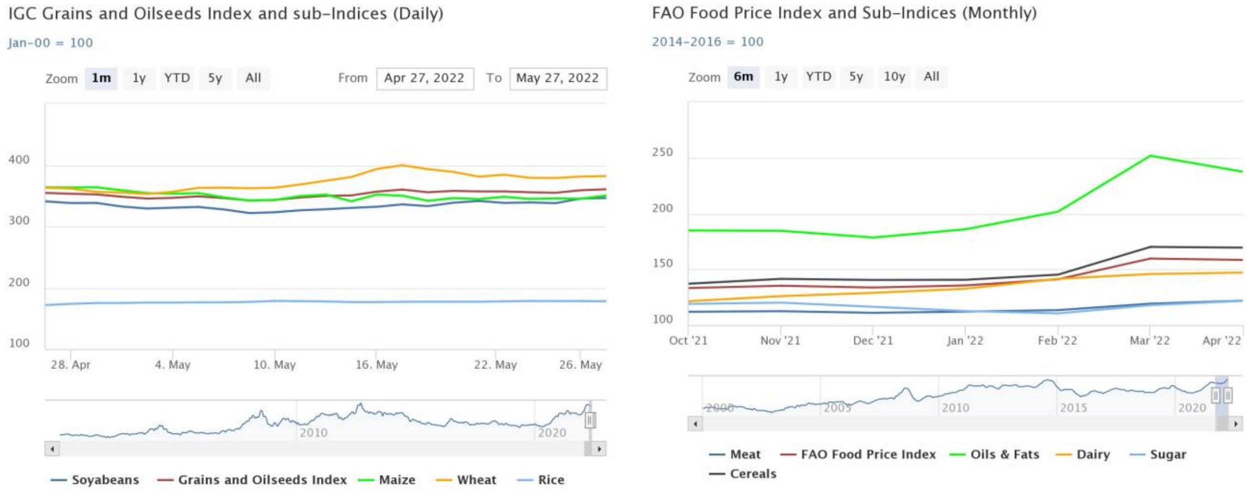


Figure 9: Global Commodity Prices, May 2022[30]

World Bank Commodities Price Data (The Pink Sheet) — 3-May-2022

Commodity	Unit		Annual Averages Jan-Dec 2019	Jan-Dec 2020	Jan-Dec 2021	Quarterly Averages Jan-Mar 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Jan-Mar 2022	Monthly Averages Feb 2022	Mar 2022	Apr 2022
Fertilizers													
DAP	$/mt		306.4	312.4	601.0	494.8	574.3	620.0	714.9	794.9	747.1	938.1	954.0
Phosphate rock	$/mt	b/	88.0	76.1	123.2	89.8	107.5	136.5	159.1	174.8	172.5	178.8	249.5
Potassium chloride	$/mt	b/	255.5	217.8	210.2	202.5	202.5	214.8	221.0	391.8	391.8	562.5	562.5
TSP	$/mt	b/	294.5	265.0	538.2	416.5	518.5	561.3	656.6	718.8	687.5	792.5	856.0
Urea, E. Europe **	$/mt	b/	245.3	229.1	483.2	317.6	351.0	435.7	828.5	821.0	744.2	872.5	925.0

[30] AMIS. Accessed at http://www.amis-outlook.org/indicators/prices/en/ on 30 May 2022

East Africa

Key drivers of commodity prices in EA[31]

Weather Shocks	Climatic shocks, droughts and flooding in many parts of the region continue to affect cropping prospects. It is reported that the region has experienced a climatic condition that has not been seen in the last 40 years ago.
Conflicts	Conflicts in Ethiopia and South Sudan continue to drive down agriculture production and trade in the region.
Macroeconomic Shocks	Global food and fuel shocks, partly due to the global food and commodity price crisis, have had spill-over effects on most domestic food prices in East Africa.

Maize prices are generally higher than their 1-12 months levels in the East African markets except for a few markets over certain periods, although the rise in these prices have slowed down or some declines have been seen over the last one month as compared to the past 3-12 months. For instance, in Rwanda, current maize prices are lower in most markets than they were a month ago, probably due to government subsidies. Also, prices in South Sudan look generally lower/stable compared to most previous periods, particularly in the past 1 and 12 months. Tanzania has also exhibited lower prices compared to the last 1 and 3 months for most markets. Kenyan maize prices have increased moderately in most markets, which is also confirmed by the Government of Kenya's Security Monitoring Committee Report.[32] Consecutive failed rains over the past four seasons, accompanied by the knock-on effects of Covid-19 and the global food crisis continue to drive food prices up. Available forecasts show favourably lower prices in the next 3-6 months as the harvest period kicks off in Tanzania and Uganda.

Table 1: Changes in maize prices in selected East African Countries[33]

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	23.75	-0.38	12.77	1.50	86.86		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG***	25.50	5.50	8.37	5.11	83.45		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG	37.88	13.31	15.84	32.08	38.20		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG	32.54	29.98	0.00	0.95	-3.17		
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG	35.88	1.61	3.31	20.20	24.02		
Rwanda	Maize (white)	Kabuga, Retail, RWF/KG	356.25	0.12	34.65	2.52	89.50	-15.57	4.89
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	370.56	-0.06	-17.65	2.46	48.22		
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	350.00	-0.07	26.68	6.06	75.73		
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	351.11	-0.09	48.36	10.88	77.53		
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	219.08	-8.26	23.55	-23.32	1.73		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	406.69	0.00	4.25	14.40	-1.93		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	288.86	4.45	4.45	-38.15	-28.72		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	200.20	0.00	16.67	40.00	-12.50		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	257.40	10.16	0.00	5.88	-10.00		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	59417.00	-2.60	-1.25	25.70	28.24	-3.29	-12.74
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	52875.00	-13.77	-3.28	25.55	7.30	-14.22	-15.99
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	61000.00	0.83	-1.35	31.45	29.40		
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	58264.00	-2.05	1.84	44.79	29.15	4.54	
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	67500.00	11.24	12.50	24.81	13.13	3.77	-7.79
Uganda	Maize (white)	Kabale, Wholesale, Uganda Shilling/kg	1232.40	13.09	43.99	17.23	127.86		
Uganda	Maize (white)	Kampala, Wholesale, Uganda Shilling/kg	1180.71	13.52	42.68	12.28	112.06		
Uganda	Maize (white)	Lira, Wholesale, Uganda Shilling/kg	1113.10	-1.92	36.89	19.65	127.60		
Uganda	Maize (white)	Masindi, Wholesale, Uganda Shilling/kg	1101.29	14.84	45.01	18.35	116.07		

[31] RATIN, 19 April 2022. Accessed at: https://ratin.net/site/news_article/11560; FEWSNET 3 May 2022. https://fews.net/east-africa
[32] Ministry of Agriculture, Livestock, Fisheries & Cooperatives - Weekly Food Security Monitoring Committee Report
[33] Author's construction based on data from WFP (2022) and FAO (2022)

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

Beans prices show a downward trend over the past one month in selected markets in Rwanda and Tanzania, except the markets of Kabuga, Dodoma, and Morogoro, which have exhibited low price increases of not more than 5.2%. In Rwanda, this is due to the harvest of fast-maturing vegetable crops from season B. Prices of beans have declined in Kigoma over the past 1-12 months while in Dodoma a decline of 10.33% and 6.80% was observed compared to the past 3 and 12 months, respectively. Moshi on the other hand have had stable prices over the past 1-3 months, an increase of 20.65% compared to 6 months ago, and a decline of 7.76% against 12 months level. Uganda beans prices have exhibited higher trends, although these are still below their levels a year ago. Available forecast data shows a decline or low-moderate price surges in most markets in the next 3-6 months.

Table 2: Changes in bean prices in selected East African Countries[34]

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	383.33	0.13	50.82	38.56	26.68		
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	440.00	-0.01	30.37	14.31	-6.09	-22.29	-10.74
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	310.00	-0.24	12.41	-3.12	-1.06		
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	352.89	-0.14	16.34	24.55	0.35		
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	173333.00	-3.22	10.64	10.73	9.09	-2.24	-7.40
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	186917.00	1.21	-10.33	1.31	-6.80	5.82	4.94
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	110000.00	-12.00	-7.04	-18.75	-27.39	-13.67	-1.92
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	197917.00	5.17	3.49	9.68	27.05	0.99	
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	185000.00	0.00	0.00	20.65	-7.76	-0.36	-3.82
Uganda	Bean (dry)	Kampala, Wholesale, Uganda Shilling/kg	2365.34	3.09	44.42	39.69	-9.73		
Uganda	Bean (dry)	Lira, Wholesale, Uganda Shilling/kg	2166.70	14.98	40.86	34.00	-8.86		

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

Sorghum prices have generally exhibited downward trends in Ethiopia and Rwanda over the past 1-6 months. Nonetheless, markets such as Addis Ababa (for red sorghum) and Nyabiheke (Camp) have experienced price increases over the past 3-6 months. Nyabiheke's sorghum prices are higher compared to 1 and 6 months ago, while Kabuga, and Mugera have had price surges compared to certain periods. For instance, compared to the past 6 months, Addis Ababa (for red sorghum), Kabuga, and Nyabiheke (Camp) have had 11.88%, 8.43%, and 6.67% increase in prices, respectively, whereas compared to the past one-month Nyabiheke (Camp) has had a 33.33% higher sorghum retail price. Current sorghum prices in Ethiopia and Rwanda are still higher than they were one year ago. South Sudan, on the other hand, shows a price surge over the past 1-6 months although this is still lower than it was a year ago, except in Juba, where it is 3% higher.

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

Table 3: Changes in sorghum 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	Sorghum (red)	Addis Ababa, Ethiopian Birr/KG	26.18	-0.57	0.58	11.88	56.30		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG	30.75	-2.75	-2.54	-18.76	30.85		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG	450.00	-13.74	-7.79	8.43	1.89		
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	500.00	0.00	-9.09	0.00	4.17		
Rwanda	Sorghum	Mugera, Retail, RWF/KG	391.42	-0.11	1.23	-5.68	5.79	-2.61	
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	400.00	33.33	-11.11	6.67	14.29		
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	207.64	5.99	55.79	168.89	-16.84		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	424.71	3.34	9.11	16.75	3.05		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	264.55	32.14	-38.33	32.14	-31.48		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	283.71	7.47	2.59	19.09	-17.33		

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

Southern Africa

Key drivers of maize prices in the Southern Africa region[36]

Weather Shocks

Poor rains, tropical storms/cyclones, and flooding in parts of the region have culminated into poor harvests across the region contributing to higher grain prices.

Conflicts

Conflicts in Mozambique continue to disrupt agricultural production and trading in the region, and hampering price recovery efforts.

Macroeconomic Shocks

Macro-economic conditions, driven by global inflationary pressures, climatic shocks, and disruption to global supply chains due to the global food and commodity price crisis, continue to put upward pressure on commodity prices in the southern region.

Generally, maize prices are higher than their levels in the past 1-12 months in Malawi and Zambia, except in Lilongwe, where current (April) prices have not changed, and Nsanje, where the prices dropped by 2.65%. A myriad of factors continue to sustain higher prices including macroeconomic factors, climatic shocks, and conflicts. In Malawi, the situation is also partly attributed to the government's farmgate price, which is set higher than the market price.[37] In Mozambique, maize prices are lower in selected markets compared to the last 1-6 months, while they are higher than their one-year level, except in Maputo. Delayed harvests and crop loss due to weather conditions and conflicts in parts of Mozambique continue to sustain higher maize prices during a period where maize prices are typically low.

[35] Author's construction based on data from WFP (2022) and FAO (2022).
[36] FEWSNET, 2022. https://fews.net/southern-africa. Accessed 2nd June 2022
[37] FEWSNET, 2022. https://fews.net/southern-africa/malawi. Accessed 2nd June 2022

Table 4: Changes in maize prices in selected Southern African Countries[38]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Malawi	Maize (white)	Lilongwe, Retail, MWK/KG**	200.00	0.00	31.58	66.67	11.11
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	186.00	23.18	48.80	91.75	19.23
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	180.00	12.50	20.00	37.40	5.88
Malawi	Maize (white)	National Average, Retail, MWK/KG	209.00	12.97	9.42	41.22	19.09
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	220.00	7.84	-2.65	36.65	27.17
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	26.86	-1.07			77.38
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	23.10	-12.60	-38.98	-8.48	-23.74
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	30.48	-5.20	-5.90	-3.21	30.63
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	4.02	4.69	19.29	39.58	21.82

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

West Africa

Key drivers of the price movements in West Africa include[39]:

Insecurity & Armed Conflicts

Persistent insecurity and armed conflicts in Burkina Faso and parts of Nigeria have affected agricultural and trading activities in the region and driving up food prices.

Economic Shocks

Several other factors such as strong demand during the Ramadan period, which depleted stocks, typically low lean season stocks, trade restrictions, the knock-on effects of higher world food prices, soaring fuel and transport costs, and the depreciation of currencies outside the franc zone, continue to drive up grain prices in the region.

With very few exceptions, particularly in the Nigerian markets, maize prices in the West African selected markets are well above their levels in 1-12 months. Below average dry season harvests in Nigeria have contributed to a decline or a slower increase in maize prices. Several factors, including the spill-over effects of the global food crisis, conflicts and insecurity, as well as the depletion of stocks as a result of the lean and Ramadan seasons, are a results of the generally higher maize prices in the region. Notably, the rate of increase of these prices have slowed down over the past month. As the new harvests kick in, prices are expected to decline in the next 3-6 months.

[38] Author's construction based on data from WFP (2022) and FAO (2022).
[39] FEWSNET, 2022. Accessed at https://fews.net/west-africa on 3rd May 2022.

Table 5: Changes in maize prices in selected West African countries[40]

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	280.00	0.60	19.47	18.86	-17.04		
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG	300.00	0.00	15.86	26.32	4.35	-8.09	-6.33
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	433.33	11.43	33.56	35.42	63.87		
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	339.00	15.91	24.40	41.16	128.24		
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	431.81	1.33	21.99	-2.03	45.28		
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	335.00	15.82	52.81	52.81	81.08		
Mali	Maize (white)	Ansongo, Retail, XOF/KG**	350.00	7.69	27.27	40.00	75.00	-14.67	-5.46
Mali	Maize (white)	Badalabougou, Retail, XOF/KG**	300.00	5.26	9.09	20.00	37.14		
Mali	Maize (white)	Faladié, Retail, XOF/KG**	294.00	15.29	17.60	17.60	47.00	-11.96	-1.90
Mali	Maize (white)	Gao, Retail, XOF/KG**	350.00	0.00	16.67	38.34	55.56		
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG**	375.00	17.19	25.00	30.21	50.00	-12.79	-2.61
Mali	Maize (white)	Niarela, Retail, XOF/KG**	325.00	10.17	30.00	30.00	62.50	-17.04	-8.86
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	250.00	-6.89	12.11	-6.37	13.64		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	250.00	-6.89	12.11	-6.37	13.64		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	223.60	13.13	-8.62	29.17	22.28		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG***	254.20	0.47	10.52	1.68	20.59		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	222.00	-1.33	13.96	-2.20	17.46		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG**	305.00	1.67	2.69	32.61	52.50		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG**	269.00	4.26	7.60	35.86	53.71		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG**	269.00	5.49	11.16	12.08	7.60		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG**	280.00	3.70	4.09	24.44	21.21		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG**	330.00	-5.71	-5.71	24.53	42.86		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG**	270.00	5.88	8.00	28.57	40.63		

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

Similar to maize prices, millet prices are higher than they were in 1-12 months ago. However, some few markets such as Abalak, Goure, Ibadan, Kaura Namoda, and Lagos, have experienced lower/stable prices compared to certain periods. For instance, in Abalak and Kaura Namoda, prices have declined by less than 1% while in Goure prices have not changed over the past one month. Similarly, compared to 6 months ago, millet prices have declined by 4.29% and 2.63% in Ibadan and Lagos, respectively.

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

Table 6: Changes in millet prices in selected West African countries[41]

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	373.00	25.59 ⊗	45.70 ⊗	6.57 ↑	39.18 ⊗		
Burkina Faso	Millet	Bousse, Retail, XOF/KG	339.00	12.62 ↑	26.02 ⊗	58.41 ⊗	35.60 ⊗		
Burkina Faso	Millet	Dori, Retail, XOF/KG	439.00	10.86 ↑	31.83 ⊗	57.91 ⊗	66.29 ⊗		
Burkina Faso	Millet	Faramana, Retail, XOF/KG	303.00	17.90 ⊗	41.59 ⊗	72.16 ⊗	81.44 ⊗		
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	395.00	27.01 ⊗	34.35 ⊗	67.37 ⊗	70.26 ⊗		
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	417.00	1.71 ▲	37.17 ⊗	68.15 ⊗	72.31 ⊗		
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	322.00	4.55 ▲	29.32 ⊗	27.78 ⊗	34.17 ⊗		
Burkina Faso	Millet	Titao, Retail, XOF/KG	380.00	14.11 ↑	49.61 ⊗	79.25 ⊗	112.29 ⊗		
Mali	Millet	Ansongo, Retail, XOF/KG**	375.00	7.14 ↑	15.38 ⊗	50.00 ⊗	76.06 ⊗		
Mali	Millet	Badalabougou, Retail, XOF/KG**	400.00	15.94 ⊗	33.33 ⊗	68.07 ⊗	93.94 ⊗		
Mali	Millet	Faladié, Retail, XOF/KG**	375.00	19.05 ⊗	25.00 ⊗	66.67 ⊗	87.50 ⊗		
Mali	Millet	Gao, Retail, XOF/KG**	410.00	17.14 ⊗	19.53 ⊗	54.72 ⊗	54.72 ⊗		
Mali	Millet	Kayes Centre, Retail, XOF/KG**	388.00	10.86 ↑	29.33 ⊗	31.97 ⊗	29.33 ⊗		
Mali	Millet	Niarela, Retail, XOF/KG**	400.00	19.40 ⊗	45.45 ⊗	77.78 ⊗	100.00 ⊗		
Niger	Millet	Abalak, Retail, XOF/KG	370.00	-0.27 ↘	7.25 ↑	21.31 ⊗	11.11 ↑	9.92 ↑	19.30 ⊗
Niger	Millet	Bonkaney, Retail, XOF/KG	318.00	1.27 ▲	9.66 ↑	11.19 ↑	15.64 ⊗		
Niger	Millet	Goure, Retail, XOF/KG	348.00	0.00 ●	10.83 ↑	17.57 ⊗	6.75 ↑		
Niger	Millet	Katako, Retail, XOF/KG	337.00	4.98 ▲	14.63 ↑	19.08 ⊗	22.55 ⊗	2.53 ▲	9.23 ↑
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	268.00	7.20 ↑	2.29 ▲	-4.29 ↘	13.56 ↑		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	241.30	0.86 ▲	0.91 ▲	30.82 ⊗	20.14 ⊗		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	239.92	-0.98 ↘	4.15 ▲	10.56 ↑	16.04 ⊗		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	266.40	0.43 ▲	0.53 ▲	-2.63 ↘	18.93 ⊗		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	238.00	0.74 ▲	12.26 ↑	2.59 ▲	22.68 ⊗		

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

In Mali, sorghum prices have remained well above their levels in the past 1-12 months, although prospects in the next 3-6 months show a decline. Similarly in Niger, sorghum prices show trends than in the past 1-12 months for almost all the selected markets, except Abalak, where prices declined against what was recorded 6 months ago, and in Goure where current sorghum price remained unchanged from the past month. Nigeria's sorghum prices remained above the recorded price levels in the past 3 and 12 months, whereas compared to the past month, prices have declined in Ibadan and Kaura Namoda, but moderately increased in other selected markets. Compared to 6 months ago, Nigeria's sorghum prices have either declined or remained stable in all selected markets except in Ibadan where they have increased by 1.29%. In Togo, sorghum prices have not changed in Anie, Cinkasse, and Lome for the past one month, but have increased by 1.82% and 2% in Kara and Korbongou, respectively. Compared to the past 3-12 months, prices have increased in all selected markets except in Annie, where prices declined against the past 3-6 months, and in Kara where they either declined or remained unchanged against the past 6-12 months. Conflicts and insecurity, as well as the trickle-down-effect of the global food and fuel price shocks continue to be the main driver of these prices, whereas in Nigeria and probably in Togo, harvests from the dry season seem to slow down or reverse price surges.

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

Table 7: Changes in sorghum 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*
Mali	Sorghum	Ansongo, Retail, XOF/KG**	375.00	50.00	50.00	59.57	87.50	-32.62	-30.49
Mali	Sorghum	Badalabougou, Retail, XOF/KG**	350.00	11.11	27.27	47.06	75.00		
Mali	Sorghum	Faladié, Retail, XOF/KG**	338.00	12.67	32.03	69.00	69.00		
Mali	Sorghum	Gao, Retail, XOF/KG**	400.00	60.00	60.00	60.00	60.00	-36.11	-34.19
Mali	Sorghum	Kayes Centre, Retail, XOF/KG**	388.00	10.86	25.97	47.53	55.20		
Mali	Sorghum	Niarela, Retail, XOF/KG**	356.00	11.25	32.34	62.56	78.00		
Niger	Sorghum	Abalak, Retail, XOF/KG	352.00	2.33	6.99	-3.03	11.39		
Niger	Sorghum	Bonkaney, Retail, XOF/KG	307.00	5.14	5.14	11.64	19.46	-5.17	0.41
Niger	Sorghum	Goure, Retail, XOF/KG	333.00	0.00	18.93	21.98	21.09		
Niger	Sorghum	Katako, Retail, XOF/KG	313.00	5.03	6.46	5.03	21.32	-0.40	7.90
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	283.60	-0.14	8.24	1.29	28.91		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	233.02	1.19	17.59	-0.13	24.52		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	251.80	-3.32	4.31	0.00	24.78		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	267.20	1.21	10.60	-4.02	26.28		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	224.00	9.27	15.46	-4.27	19.15		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG**	295.00	0.00	-0.67	-1.67	40.48		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG**	250.00	0.00	6.38	13.64	19.05		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG**	280.00	1.82	1.45	-11.11	0.00		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG**	255.00	2.00	3.24	15.91	21.43		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG**	320.00	0.00	1.59	12.28	8.11		

*Note: Last price is for April 2022, *May, **March, ***February, and ****January*

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

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

Climatic Conditions and Potential Implications for Food and Nutrition Security

In East Africa, the seasonal rainfall forecasts for June-July-August (JJA) season show above-normal rainfall conditions in the cross-border areas of Ethiopia, South Sudan, Kenya, and northern Uganda (Figure 11 and FSNWG March Edition)[43]. Also, the central-to-northern parts of Ethiopia and Sudan are expected to receive above-normal precipitation during this period. However, much of Tanzania, Rwanda, Burundi, central and south-eastern Kenya, as well as the southern and western parts of Uganda, are expected to experience dry conditions during this period. The East African region has experienced a historic four-season drought accompanied by the knock-on effects of Covid-19, global economic and food crisis as well as conflicts and insecurity, leading to an adverse food security situation in the region. Due to these multi-faceted factors, much of the region is expected to experience food, insecurity with Ethiopia and Somalia likely to experience a catastrophic food crisis in the coming months.

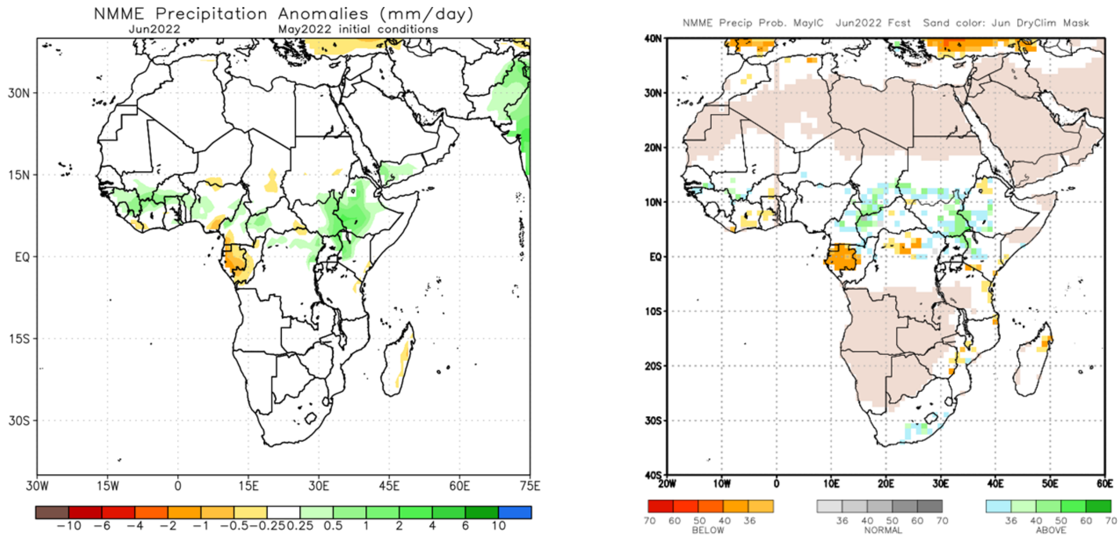


Figure 10: North American Multi-Model Ensemble (NMME) rainfall forecast for May 2022 based on April 2022 initial conditions[44]

Much of Southern Africa is expected to have dry conditions during the June-August period, which is typical of the lean season, while the harvesting period closes off. Improved food security conditions are observed over the region following the harvesting period amidst a myriad of factors including conflicts and insecurity in Mozambique, weather shocks, and general global economic shocks, which led to below-average agriculture outputs. However, food security concerns remain over conflict areas in Mozambique and in areas where severe weather conditions have disrupted cropping/harvesting activities leading to crop loss.

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

[44] 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 June 2022.

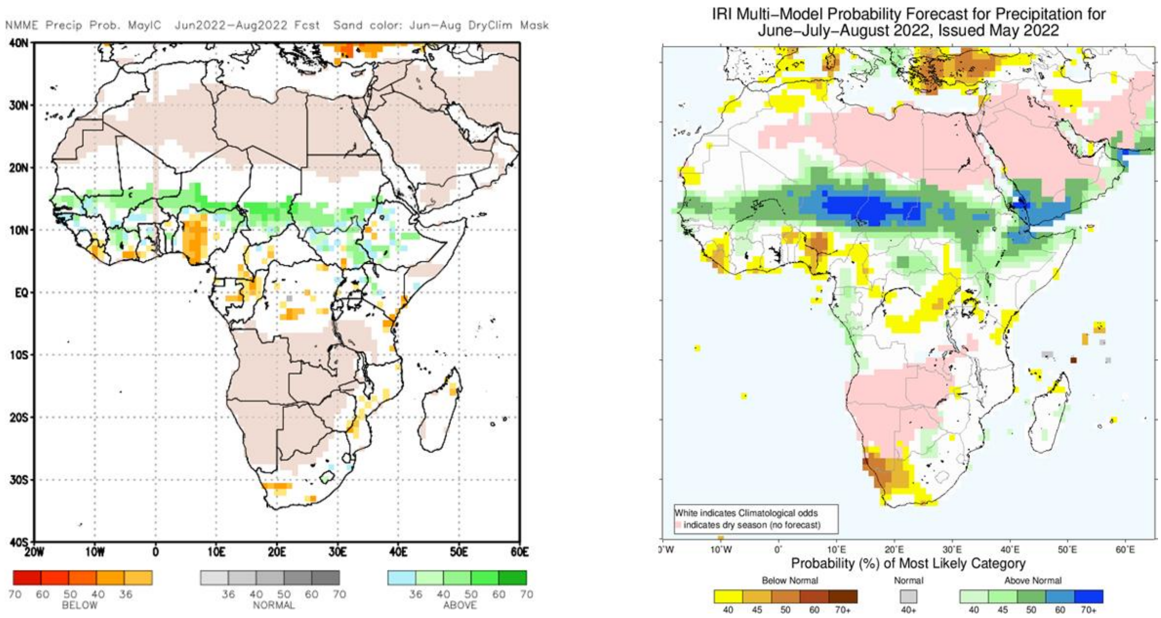


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for the June-August 2022, based on May 2022 initial conditions[45]

In the West Africa region, the June-August (JJA) rainfall forecast shows mostly below-average conditions, with small pockets of above-normal rainfall conditions. Much of the coastal parts of the region, southern and central Nigeria, northern Benin, Sierra Leone, and Guinea are expected to have below-normal rainfalls. However, above-normal rainfall is expected in northern Cote d'Ivoire, Burkina Faso, and Nigeria, as well as the southern parts of Mali and Niger. There are also pockets of rains expected over central Ghana and Benin during the JJA period. The planting season has begun in the region with atypical rainfall patterns, which is likely going to affect cropping and result in below-average harvests. Persistent conflicts and insecurity in parts of the region, depleted stocks as a result of strong regional demands and the lean season, trade restrictions, the knock-on effects of higher world food and fuel prices, and macroeconomic shocks continue to threaten food security conditions in the region. Nigeria and the conflict-affected regions of Burkina Faso and Mali are particularly expected to experience worsening food security situation.

[45] 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.

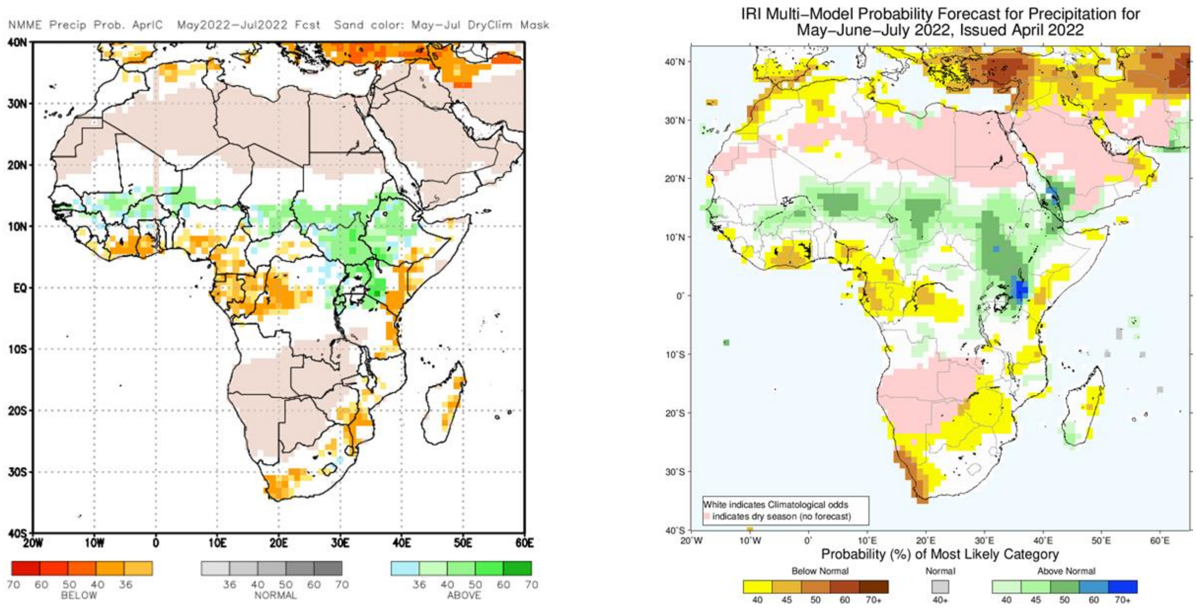


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for the May-July 2022, based on April 2022 initial conditions[46]

[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.

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