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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

EDITION **26**

June 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. 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 June Food Security Monitor are summarised below.

Russia-Ukraine Conflict

- The Africa Fertilizer Financing Mechanism (AFFM) announced that it will extend a $2 million partial trade credit guarantee to ETG Inputs Ghana Limited to support delivery of fertilizer to 200,000 smallholder farmers in Ghana's Upper East, Savannah, Northeast, and Northern Regions.

Food Security Outlook

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

The ongoing Russia-Ukraine conflict continues to drive cereal shortages particulalry for wheat across most import-dependent countries in East Africa, resulting in price surges that are eroding household economic capacity to access food.

On-going harvests are improving household access to food across most parts of the Southern African region, but challenges remain in some deficit areas, where IPC Phase 3 (Crisis) outcomes are being experienced.

In West Africa widespread record prices continue to drive household food insecurity across the region.

Food Trade

At least 28 banks in Africa have joined the Pan-African Payment and Settlement System (PAPSS), a creation of the African Export-Import Bank (Afreximbank) to facilitate intra-African trade through the settlement of transactions in local currencies under the Africa Continental Free Trade Area.

In East Africa, the ECA is helping 10 African countries to implement AfCFTA strategies and overseeing the formulation of seven new national strategies. It is also developing a Country Business Index tool that uses high-quality data to assess the impact of the AfCFTA on the private sector.

In Southern Africa, the Southern Africa Development Community has begun supporting small-scale farmers with information on how to comply with sanitary and phytosanitary (SPS) measures under the Trade Facilitation Programme (TFP).

In West Africa, ECOWAS, CILSS and CORAF launched the Food Systems Resilience Programme, which aims to sustainably reduce food insecurity in the region with the financial support of the World Bank and other development partners, including the Kingdom of the Netherlands, the Global Agriculture & Food Security Programme (GAFSP) and the Global Risk Financing Facility (GRiF).

Commodity Prices

Commodity prices continue an upsurge driven by a myriad of factors, including a fall in commodity outputs, rising transport costs due to rising fuel prices, as well as restrictive trade measures adopted by some countries in response to the food crisis.

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).

African Fertilizer Market Overview

As the crisis in Ukraine rages on, efforts continue to improve the access to agricultural inputs and reduce reliance on food and input imports from the affected region. Over the last month, the Africa Fertilizer Financing Mechanism (AFFM) announced that it will extend a $2 million partial trade credit guarantee to ETG Inputs Ghana Limited to support the delivery of fertilizer to 200,000 smallholder farmers in Ghana's Upper East, Savannah, Northeast, and Northern Regions[1]. The Afreximbank, continues to step in with its 4-billion-dollar Ukraine Crisis Adjustment Trade Finance Programme for Africa (UKAFPA) to help countries contain the short-term impacts of the crisis.

Fertilizer Prices

The World Bank Pink Sheet below shows the prices of DAP and urea fertilizers decreased over April and May, while phosphate prices increased, and potassium chloride remained unchanged (see table 1). Over the past one month, most types of fertilizer prices remained unchanged in Rwanda, decreased in Cote d'Ivoire, and Ghana, and increased in all other countries. Compared to the past 3-6 months, available data shows that current prices have declined except for Urea prices in Kenya and Nigeria. As a result of the fertilizer crisis, most countries have instituted fertilizer subsidies to curb the increase in prices.

World Bank Commodities Price Data (The Pink Sheet) **2-Jun-2022**

			Annual Averages			Quarterly Averages					Monthly Averages		
			Jan-Dec	Jan-Dec	Jan-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Mar	Apr	May
Commodity	Unit		2019	2020	2021	2021	2021	2021	2021	2022	2022	2022	2022
DAP	$/mt		306.4	312.4	601.0	494.8	574.3	620.0	714.9	794.9	938.1	954.0	842.5
Phosphate rock	$/mt	b/	88.0	76.1	123.2	89.8	107.5	136.5	159.1	174.8	178.8	249.5	255.0
Potassium chloride	$/mt	b/	255.5	217.8	210.2	202.5	202.5	214.8	221.0	391.8	562.5	562.5	562.5
TSP	$/mt	b/	294.5	265.0	538.2	416.5	518.5	561.3	656.6	718.8	792.5	856.0	827.5
Urea, E. Europe **	$/mt	b/	245.3	229.1	483.2	317.6	351.0	435.7	828.5	821.0	872.5	925.0	707.5

[1] https://www.afdb.org/en/news-and-events/press-releases/ghana-africa-fertilizer-financing-mechanism-extends-2m-etg-inputs-ghana-limited-boost-farmers-access-fertilizers-52359

Table 1: Changes in fertilizer prices in selected African Countries2

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Kenya	DAP	National, USD per ton	1065.00	1.14			
Kenya	Urea	National, USD per ton	1233.00	2.49	9.89	32.01	
Rwanda	DAP	National, RWF/KG	832.00	0.00			
Rwanda	NPK 17:17:17	National, RWF/KG	882.00	0.00			
Rwanda	Urea	National, RWF/KG	768.00	0.00			
Tanzania	Nitrate fertilizer	National, TZS/KG	700.00	-5.91			
Tanzania	Phosphate fertilizer	National, TZS/KG	1000.00	6.61			
Mozambique	NPK	National, MZN/50kg	3075.00	4.24			
Mozambique	Urea	National, MZN/50kg	3650.00	4.29			
Zambia	NPK	National, Kwacha/50kg	850.88	6.82			
Zambia	Urea	National, Kwacha/50kg	955.85	6.42			
Cote d'Ivoire	NPK 15 15 15	National, USD per ton	887.00	4.35			
Cote d'Ivoire	PK 0 23 19 + 6.5S + 5MgO + 10CaO	National, USD per ton	806.00	-2.77			
Cote d'Ivoire	Urea	National, USD per ton	1026.00	-2.75	-6.73	-7.23	
Ghana	NPK 23 10 5	National, USD per ton	1058.00	-5.96			
Ghana	Urea	National, USD per ton	1217.00	-7.31	-12.70	15.79	
Mali	NPK 15 15 15	National, USD per ton	1045.00	0.77			
Mali	Urea	National, USD per ton	1079.00	0.65	-3.40	-26.65	
Nigeria	NPK 15 15 15	National, USD per ton	1220.00	2.61			
Nigeria	NPK 20 10 10	National, USD per ton	1112.00	3.06			
Nigeria	Urea	National, USD per ton	922.00	15.39	18.81	66.13	

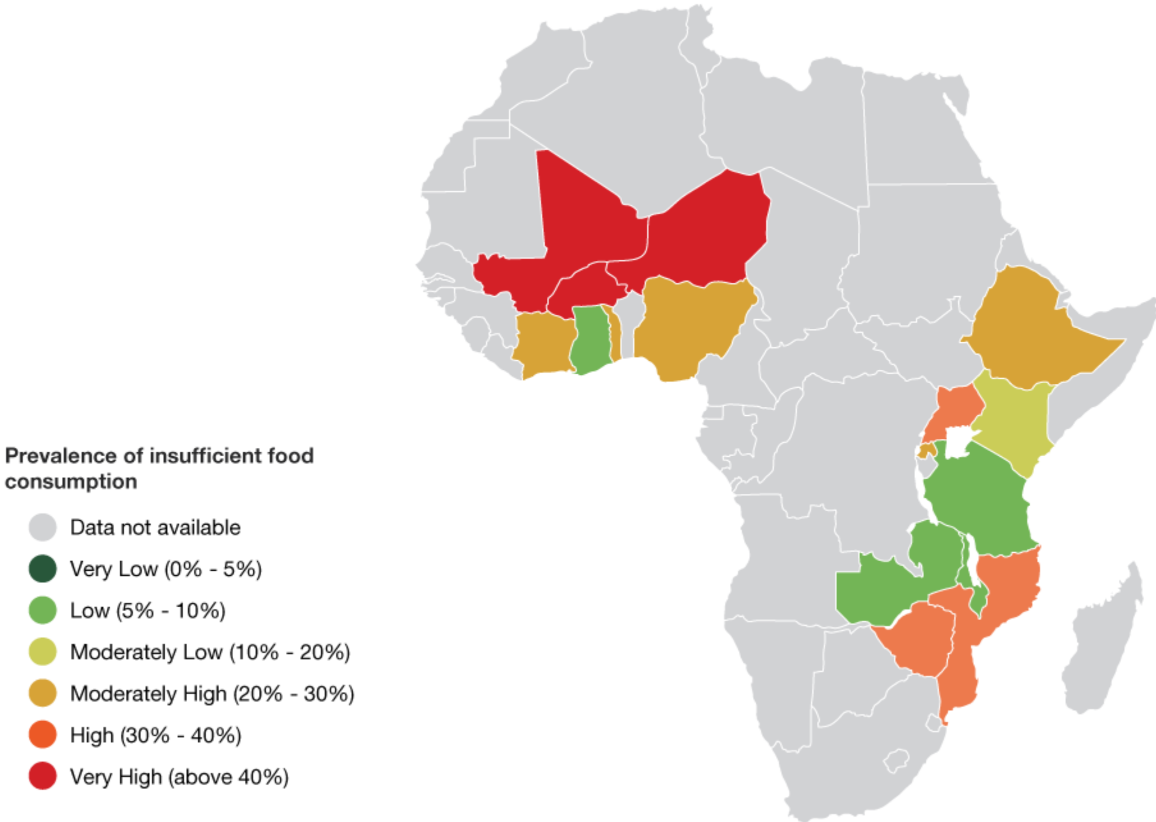
[2] Author's construction based on data from AfricaFertilizer.org and national prices collected by AGRA

Food Security Outlook

Prevalence of Insufficient Food Consumption and Food Insecurity Hotspots

Figure 1 provides a status update of the prevalence of insufficient food consumption across 17 selected East, Southern and West African countries in June. During the month, the number of Food Insecurity Hotspots, defined as countries where more than 50 percent of the total population has insufficient food for consumption, remained at four. These were South Sudan (60.9%), Burkina Faso (55.6%), Mali (64.4%) and Niger (78.1%).

Figure 1: Prevalence of Insufficient Food Consumption, June 2022[3]



Source: Own analysis based on data from WFP (2022)[4]

East Africa

As of 30 June 2022, 62.6 million people across six selected East African countries did not have sufficient food for consumption. This represents a 7.6 percent increase from May 2022, indicating that the food security situation deteriorated across these focus countries over 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.

[3] https://hungermap.wfp.org/ Accessed 30 May 2022
[4] https://hungermap.wfp.org/. Accessed 30 May 2022

Table 1: Prevalence of insufficient food consumption across selected East African countries (Jun 2022)[5]

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	2.90	2.80	22.76	-3.45 ↓	2.30	38.30
Ethiopia	109.20	21.00	24.10	22.07	14.76 ↗	7.20	36.80
Tanzania	56.30	5.30	5.10	9.06	-3.77 ↓	3.50	31.80
South Sudan	11.00	6.30	6.70	60.91	6.35 ↑	22.70	31.30
Uganda	42.70	16.10	16.10	37.70	0.00 ●	3.50	28.90
Kenya	51.40	6.60	7.80	15.18	18.18 ↗	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 June 2022, the number of people with insufficient food for consumption across four selected countries in Southern Africa stood at 18.5 million. This represents a 1.0 percent increase from May 2022, indicating that the region's food security situation marginally deteriorated 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.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (Jun 2022)[6]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)
Mozambique	29.50	8.50	7.40	25.08	-12.94 ↘	4.40	42.30
Malawi	18.10	2.80	3.30	18.23	17.86 ↗	1.30	39.00
Zambia	17.40	2.10	2.40	13.79	14.29 ↗	4.20	34.60
Zimbabwe	14.40	4.90	5.40	37.50	10.20 ↗	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 107.7 million as of 30 June 2022. This was a 4.0 percent increase from the previous month, 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 the month.

Table 3: Prevalence of insufficient food consumption in selected West African countries (June 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 (%)
Niger	22.40	15.60	17.50	78.13	12.18 ↗	14.10	48.50
Nigeria	202.80	53.50	54.10	26.68	1.12 ↑	6.80	36.80
Mali	19.10	11.00	12.30	64.40	11.82 ↗	9.00	26.90
Burkina Faso	19.80	10.50	11.00	55.56	4.76 ↑	8.40	24.90
Togo	7.90	2.10	2.00	25.32	-4.76 ↓	5.70	23.80
Cote d'Ivoire	25.10	4.70	5.10	20.32	8.51 ↑	6.10	21.60
Ghana	29.80	5.90	5.70	19.13	-3.39 ↓	6.80	17.50

**Previous month and ** Current month*

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

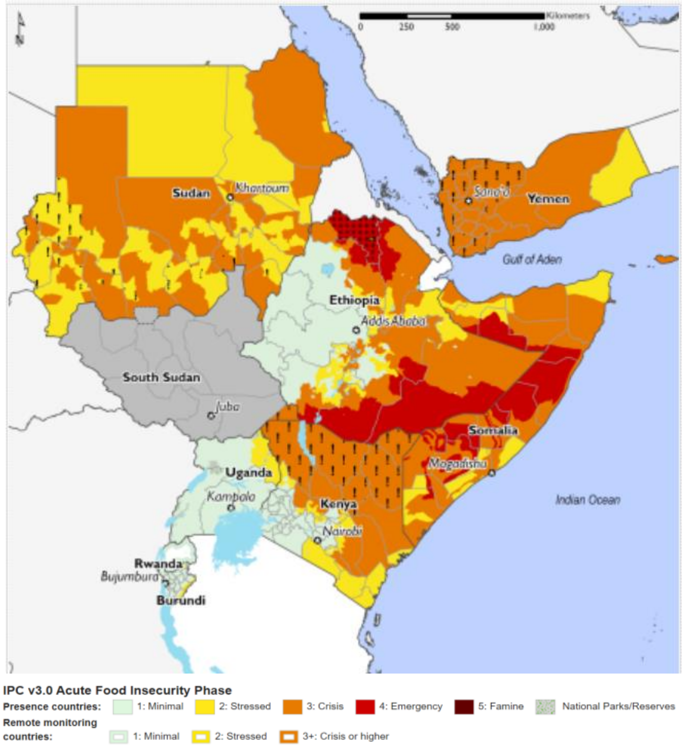


Figure 3: East Africa countries Food Security Outlook, Jun-Sep 2022

East Africa Food Security Outlook

Protracted conflicts, population dispalcement, dry spells and an economic decline continue to drive IPC Phase 3 outcomes across the region. The ongoing Russia-Ukraine conflict continues to drive cereal shortages particulalry for wheat across most import-dependent countries resulting in price surges that are eroding houshold's economic capacity to access food. Persisient currency depreciation and high inflation are expected to continue elevating staple food prices in coming months particularly in Ethiopia, Sudan, Burundi, and South Sudan.

Kenya: The country continues to face high levels of food insecurity sustained by the poor rainfall season this year, which resulted in poor harvests. Shortages of maize supplies and lack of financial means to import maize have led to the closure of half of the country's small-scale milling businesses, which account for 70 percent of its maize flour supplies. As a result, there has been an upsurge in the price of maize flour[8]. To prevent the food security situation crisis from worsening, the government announced that it has suspended all taxes on maize coming into the country effective 1st of July 2022[9].

Ethiopia: The food security situation in the country continues to deteriorate, particlarly in the conflict-affected regions. The number of people in need of food assistance in the Northern parts of the country has increased to 13 million up from 9 million in November 2021, worsening the food insecurity[10].

Uganda: Low-income households in the Eastern and and Northern bimodal areas, as well as some central bimodal regions, are expereincing Stressed (IPC Phase 2) outcomes driven by below-average harvests in 2021 and atypically high prices of food, non-food commodities, and essential services like education and transportation. This situation is however, expected to improve as harvests durng the June/July period kick in, improving food supplies[11].

South Sudan: The number of people experiencing IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) outcomes in the country has been increasing amidst the ongoing lean season. Other parts of the country are experiencing potential IPC Phase 5 (Catastrophe) outcomes due to conflict, insecurity, and/or floodwaters, which are impeding household access to food and income sources. These outcomes are expected to persist for the rest of the year as households' capacity to produce or purchase food commodities remain disrupted by

[8] https://www.businessdailyafrica.com/bd/markets/commodities/half-of-small-millers-shut-down-on-maize-shortage-3843742
[9] https://www.capitalfm.co.ke/news/2022/06/maize-flour-prices-to-go-down-as-govt-removes-tax-on-imports/
[10] https://reliefweb.int/country/eth
[11] https://reliefweb.int/report/uganda/uganda-key-message-update-late-harvests-and-above-average-market-prices-limiting-food-access-nationwide-may-2022

the conflicts. Global food and fuel price shocks due to the ongoing crisis in Ukraine will also be a major factor in the worsening food security[12].

Southern Africa Food Security Outlook

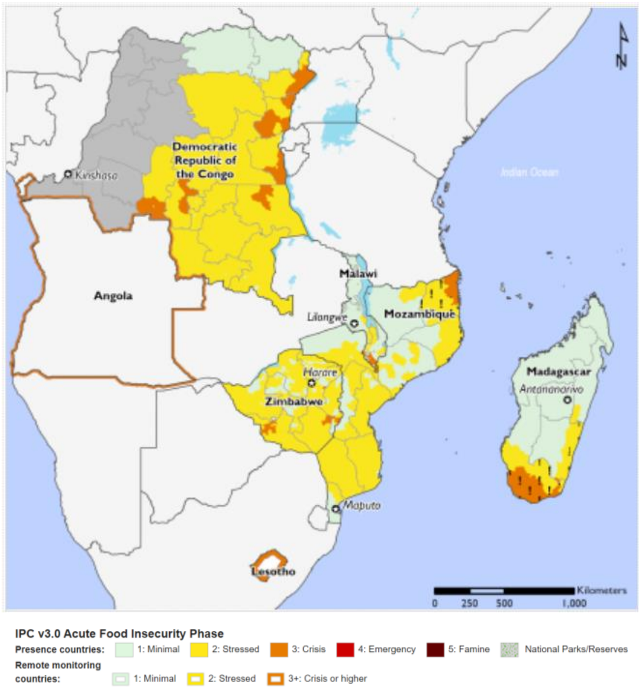


Figure 4: Southern Africa countries Food Security Outlook, Jun - Sep 2022

On-going harvests are improving households' access to food across most parts of the regions, but challenges remain in some deficit areas where IPC Phase 3 (Crisis) outcomes are being experienced.

Malawi: Below-average harvests due to poor rainfall performance, multiple tropical storms, limited access to agricultural inputs, and worsening macroeconomic conditions characterised by low foreign reserves are hampering post-harvest food security improvements[13]. Meanwhile, the African Risk Capacity Group and the African Development Bank made a $14.2 million drought recovery insurance pay-out to the Government of Malawi[14].

Mozambique: Recent harvests from the 2021/22 season are contributing to IPC Phase 1 (Minimal) outcomes for most low-income households across the country. However, the drought-affected Southern and Central parts of the country are experiencing IPC Phase 2 and IPC Phase 3 outcomes due to depleted food reserves, and limited income-generating opportunities[15].

Zambia: The government has received a US$5.3 million drought insurance pay-out from the African Risk Capacity Group and the African Development Bank to aid in the country's recovery from the extreme drought event during the 2021/2022 agriculture season[16].

Zimbabwe: IPC Phase 1 (Minimal) and IPC Phase 2 (Stressed) outcomes are being experienced during the current post-harvest period. However, the deteriorating macroeconomic situation characterised by increasing foreign exchange rates, which are fuelling inflation and limiting households access to food will see most parts of the country moving to IPC Phase 3 outcomes as we approach the lean season. The opening of land borders and the resultant increase in cross-border trade activities are also contributing to improved incomes and food access amidst a poor harvest[17].

[12] https://reliefweb.int/report/south-sudan/south-sudan-key-message-update-food-assistance-declines-further-reaching-only-1-6-people-crisis-or-worse-april-may-2022
[13] https://fews.net/southern-africa/malawi
[14] https://reliefweb.int/report/malawi/malawi-receives-us142-million-drought-recovery-insurance-payout
[15] https://fews.net/southern-africa/mozambique
[16] https://reliefweb.int/report/zambia/african-risk-capacity-group-arc-group-and-african-development-bank-provide-us53-million-government-zambia-drought-response
[17] https://fews.net/southern-africa/zimbabwe

West Africa Food Security Outlook

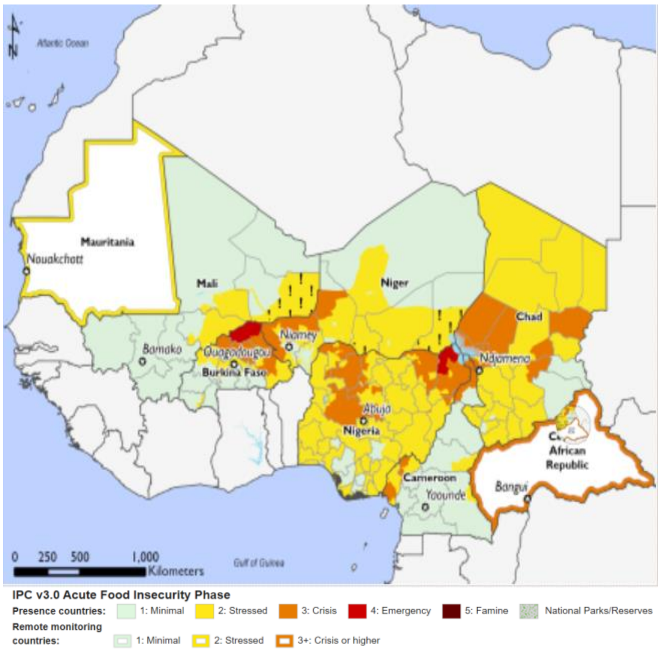


Figure 5: West Africa countries Food Security Outlook, Jun-Sep 2022

Widespread record prices continue to drive household food insecurity across the region.

Burkina Faso: Continued insecurity targeting civilians and driving displacements is preventing households from consistently accessing food, leading to acute food insecurity in the country. Despite a favourable rainfall outlook showing abundant rains, concerns remain over the sufficient availability of industrial fertilizer (NPK and urea) as a result of the crisis in Ukraine[18].

Mali: The security situation in the country continues to affect food security outcomes albeit with marginal improvements owing to the ongoing agricultural activities. The country received its first rains at the start of June, marking the beginning of the start of the 2022/23 agricultural season. The country is forecast to have normal to excess rainfall. However, challenges with accessing agricultural inputs namely fertiliser and seed will likely result in below-average harvests[19].

Niger: Rising security incidents in the far west, far south-east and south-central parts of the country, as well as increasing prices continue to limit household food access resulting in IPC Phase 3 and IPC Phase 2 outcomes. The prices of food products imported from the international market, in 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 after the Ukrainian crisis, which is disrupting the functioning of international commercial circuits. The rain-fed agricultural season has started with country receiving some good rains[20].

Nigeria: Rising commodity prices, deteriorating macroeconomic conditions and conflicts in the north-eastern parts of the country are driving predominately IPC Phase 3 outcomes in the country. Despite improved food availability from the dry season harvest, most households continue to face difficulties in accessing food due to low purchasing power and atypically high food prices. The Naira continues to lose value against the USD amidst high demand and shortage of foreign exchange[21].

[18] https://fews.net/west-africa/burkina-faso
[19] https://fews.net/west-africa/mali
[20] https://fews.net/west-africa/niger
[21] 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 which have implications on food trade at the continental level in Africa.

- Over a year since the launch of the African Continental Free Trade Agreement (AfCFTA), at least 28 banks in Africa have joined the Pan-African Payment and Settlement System (PAPSS), a creation of the African Export-Import Bank (Afreximbank), to facilitate intra-African trade through the settlement of transactions in local currencies. The system took off with a USD 500m facility with an additional 24 banks expected to join[22].
- Rwanda is set to host the Poultry Africa Trade Show in October 2022. The event, which started in 2017, will showcase feed-to-food innovations for the poultry industry in Sub-Saharan Africa.

East Africa

The ECA has made significant progress towards adopting and implementing many of the key recommendations set in last year's Conference of Ministers held in Addis Ababa, Ethiopia. These include:

- Helping 10 African countries implement AfCFTA strategies and overseeing the formulation of seven new national strategies.
- Developing a Country Business Index tool that uses high-quality data to assess the impact of the AfCFTA on the private sector.
- Developing and deploying nine country profiles on digital-trade regulatory integration, helping to identify and overcome the challenges faced in terms of Africa's digital economy[23].

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.

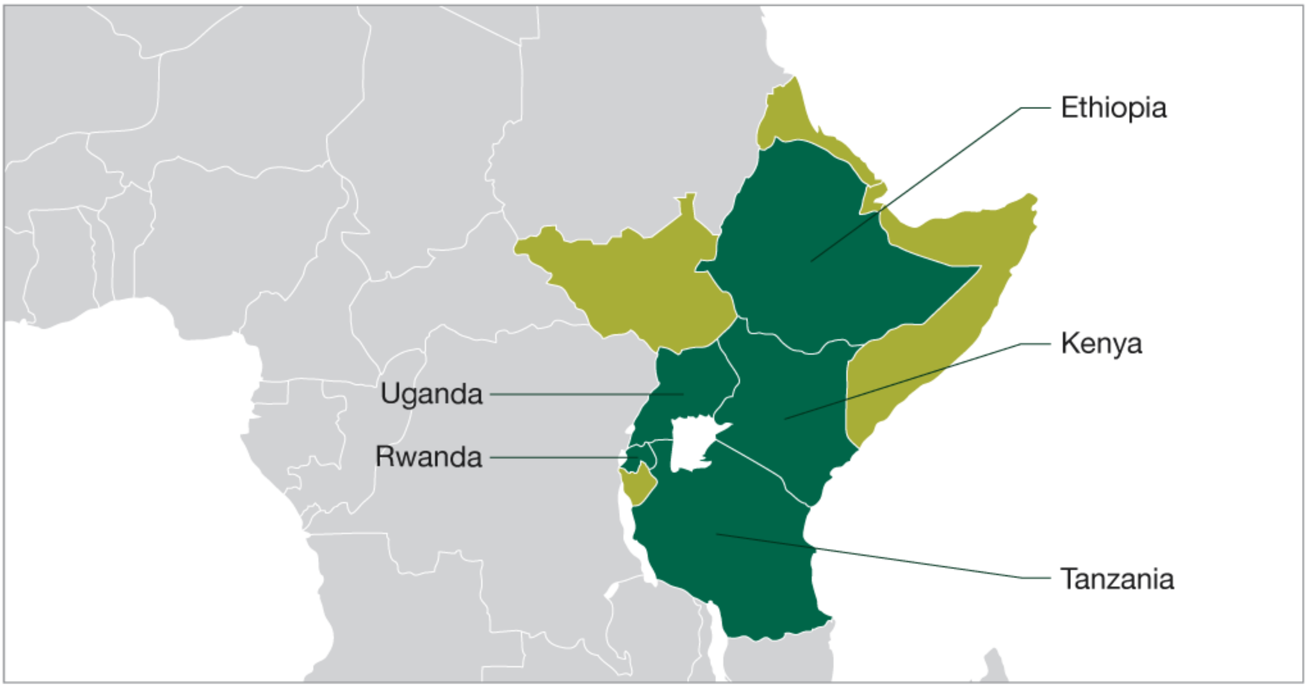


Figure 6: East Africa Cross border trade updates June 2022

[22] https://dailytrust.com/afcfta-28-banks-join-500m-pan-african-settlement-platform

[23] https://african.business/2022/06/economy/eca-implements-key-recommendations-fromcom2021/

KENYA

- The Kenya Association of Manufacturers expressed worries over the dollar shortage, claiming members, who mainly rely on imported raw materials, cannot access dollars at the official market rates.
- The government announced that it will begin exporting livestock products from the Chinese-built Lamu Port in 2023.
- The East Africa Business Council wants Kenya Revenue Authority (KRA) officials to be posted to key cities in Tanzania to facilitate pre-arrival clearances and reducing traffic queues at border points.
- Millers announced that they will be shipping in at least 1.5 million 90-kilo bags of wheat between 13 and 25 June.
- Importers using the Mombasa port are experiencing delays in cargo delivery and collection following a payment dispute pitting Kenya Ports Authority (KPA) and the Kenya Railways Corporation (KRC-SGR) against shipping lines.
- Kenya is set to increase sugar imports to meet local demand.
- The cost of transporting maize from the source markets, which has increased by 150 percent resulting in transporters charging the equivalent of Sh1,500 from Sh600 previously for a single bag of maize transported from either Malawi or Zambia, has pushed the landing cost of a 90-kilo bag in Nairobi to Sh6,000.
- The government has suspended all taxes on maize imported into the country in a bid to boost food security.
- The government has embarked on a sensitization campaign countrywide to create awareness amongst the business community on the opportunities offered by the African Continental Free-Trade (AfCFTA), and how to exploit the openings offered.
- Importers and exporters in Kenya are set to benefit from increased competitiveness and reduced cost of doing business from reduced shipment delays and demurrage charges after President Uhuru Kenyatta assented to the National Electronic Single Window System Bill, 2021, on June 21.

RWANDA

- Members of the East African Legislative Assembly (EALA) on Tuesday, June 7, decried the numerous challenges traders face at the Rusumo border crossing between Rwanda and Tanzania
- The Democratic Republic of Congo announced that it is suspending all bilateral trade agreements with Rwanda, which it accuses of supporting the M23 rebels, even though Kigali denies the charge.
- The East African Court of Justice has ruled that the closure of the Gatuna border by Rwanda was illegal and contravened the East African Community Treaty.

TANZANIA

- Increased exports to Kenya have forced the Tanzania Revenue Authority to post its officials to Mombasa and Nairobi to facilitate the pre-arrival clearance of goods.
- Tanzania has imposed a new requirement on grain traders to get an export permit before shipping maize out of the country, in a policy shift that has locked already bought stocks of grain by Kenyan millers at the border.
- Tanzania has doubled the cost of export permits by 93 percent, a move likely to open another round of trade disputes between Nairobi and Dar es Salaam. The authorities in Tanzania have increased the cost of acquiring export permits from the previous Sh27,000 per truck to Sh52,000, according to border officials

UGANDA

- Kenya and Uganda are staring at another round of trade wars after Nairobi reintroduced a levy on eggs imported from the neighbouring country. Uganda says Kenya is now taxing its eggs at a rate of Sh72 a tray, bringing back a levy that had been suspended last December following bilateral talks between Kampala and Nairobi.

ETHIOPIA

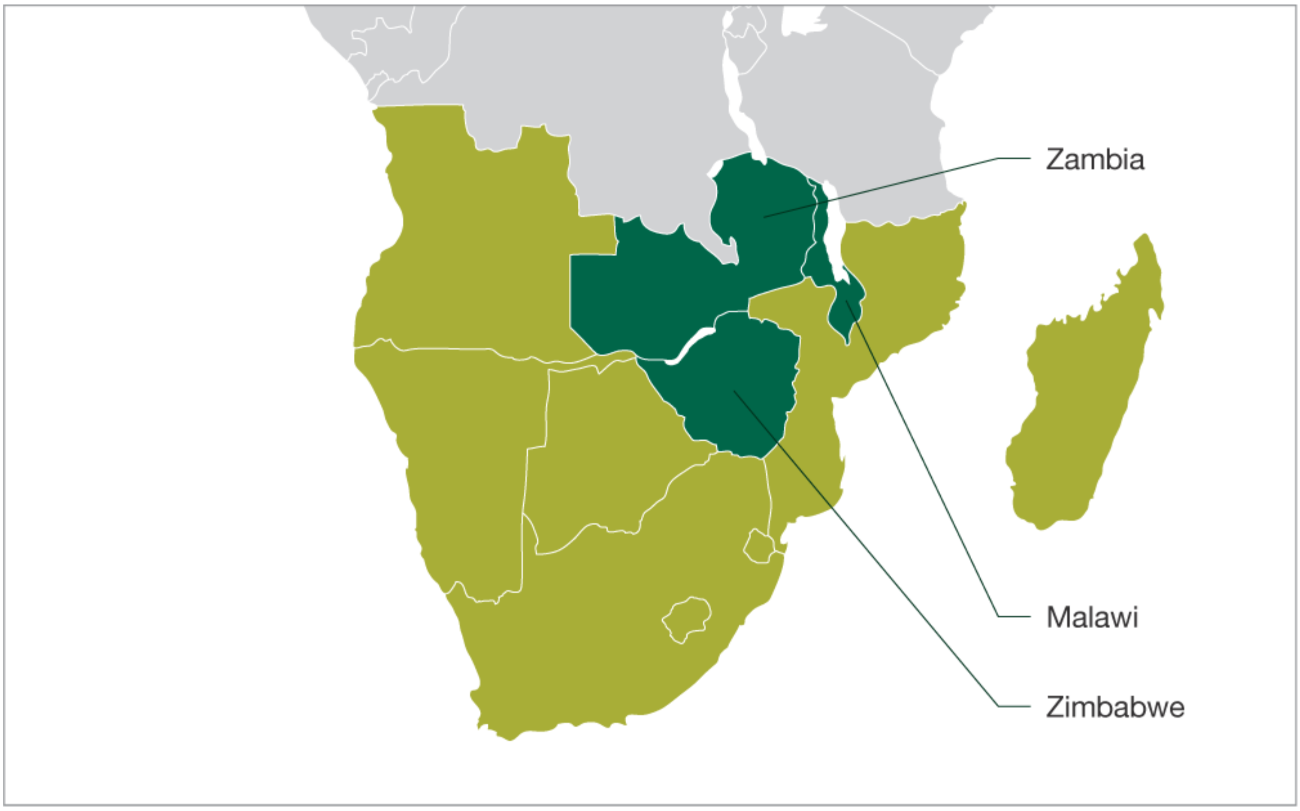
- Ethiopia recently secured a €22 million loan from Italy for the development of agro-industrial parks in the country. The loan will help build the capacity of national and regional industrial park development companies, farmers' organizations, and private investors. It will also facilitate innovative contractual arrangements aimed at connecting farmers' organizations with agro processors.

Southern Africa

The Southern Africa Development Community has begun capacitating small-scale farmers in complying with sanitary and phytosanitary (SPS) measures under the Trade Facilitation Programme (TFP), which the bloc is implementing with support from the European Union (EU) to enable the region further integrate in various areas of economic development. The effort aims to protect the health and welfare of human, plant, and animal life in the region and beyond[24].

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 June 2022



MALAWI

- The Leader of Opposition in Parliament, Kondwani Nankhumwa, has written President Lazarus Chakwera asking him to intervene and stop the sale of maize by the Agriculture Development Corporation (ADMARC) to Grain Millers of Zimbabwe saying the decision will likely negatively impact Malawi's food security situation.

ZIMBABWE

- Customs clearing and freight forwarding agents have hailed the Government for fully implementing the US$300 million Beitbridge Border Post transformation project that will among other things see services and operations being automated

ZAMBIA

- Kenya and Zambia have agreed to work together towards removing barriers that hinder trade and investment between the people of the two countries. President Kenyatta said this during the Zambian President Hakainde Hichilema's visit to Nairobi.

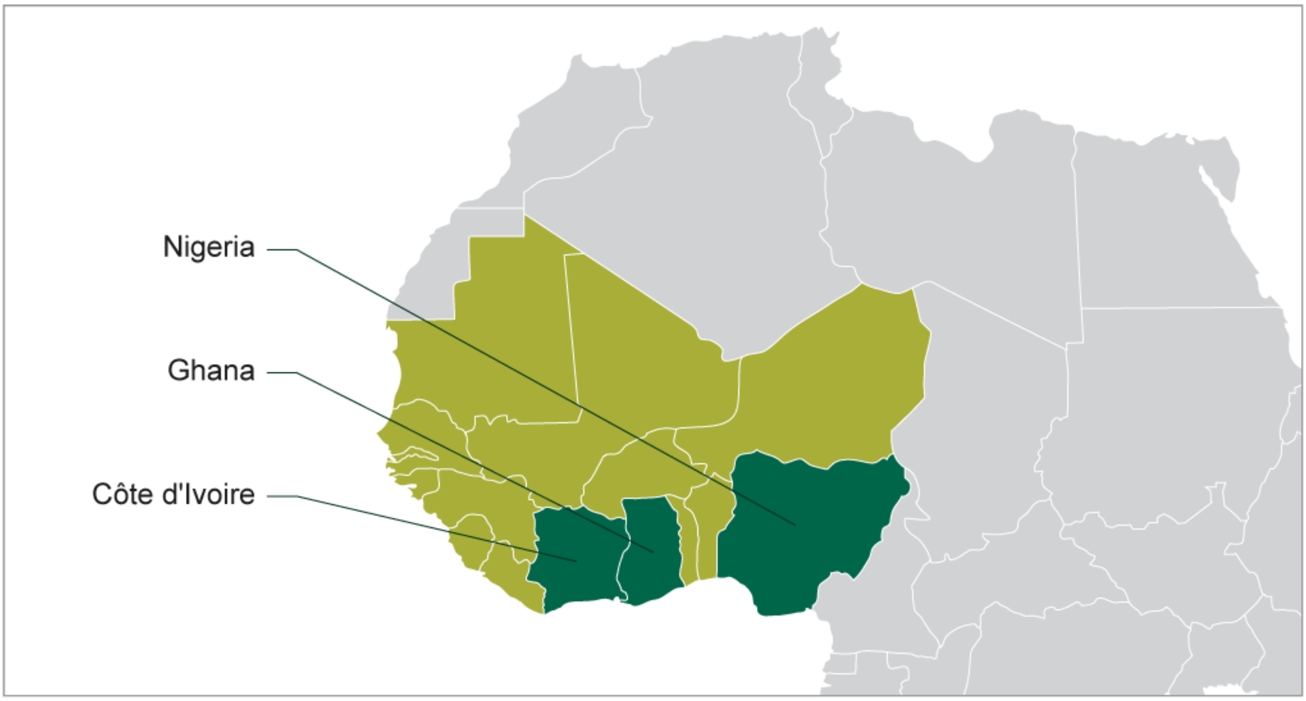
[24] https://www.chronicle.co.zw/sadc-harmonises-sps-measures-to-boost-regional-trade/

West Africa

ECOWAS, CILSS and CORAF launched the Food Systems Resilience Programme which aims to sustainably reduce food insecurity in West Africa with the financial support of the World Bank and other development partners, including the Kingdom of the Netherlands, the Global Agriculture & Food Security Programme (GAFSP) and the Global Risk Financing Facility (GRiF). The FSRP aims to increase regional preparedness against food insecurity by pursuing a systemic regional-level approach. The innovative program will simultaneously increase agricultural productivity through climate-smart agriculture, promote intraregional value chains and trade, and build regional capacity to manage agricultural risk[25].

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 June 2022



GHANA

- The Minister of Food and Agriculture is urging importers of organic fertilizers to start sourcing their raw materials from local sources. This according to him will boost efforts being made towards the production of more organic fertilizer even as imports have been distorted due to the Russia-Ukraine crisis.
- A governance structure in the form of a sector committee to guide the successful implementation of the National Export Development Strategy (NEDS) has been inaugurated in Accra. A media release issued in Accra on June 16, 2022, said that the NEDS, spanning 10 years (2020-2029), sought to diversify and grow the Non-Traditional Export (NTE) sector of the economy and employ a private-sector-driven approach.

NIGERIA

- Nigerian seaports which have experienced decades of infrastructural decay and reduction in commercial shipping activities are set to undergo upgrade to boost trade.
- The World Bank, in its latest Nigeria Development Update, argued that the country's protectionist trade policy conceived to protect Nigerian local manufacturing industry is counterproductive.

COTE D'IVOIRE

- Cote d'Ivoire, is repositioning itself for the African Continental Free Trade Area (AfCFTA) with ongoing developmental projects and strategic investments aimed at building ready and skilled workforce across the trade and logistics value chain, including the teaching of trade-related courses in English.

[25] https://newsghana.com.gh/west-africa-food-systems-resilience-program-launched/

Agricultural Commodities Price Monitoring

Overview of Global Prices

International Grains Council (IGC) Grains and Oilseeds Index (GOI) rose only marginally by 0.5% between April and May this year but about 22.3% compared to the same period last year. On a monthly basis, wheat and rice prices rose by 5.5% and 3.2% while maize and soybean prices dipped by 3% and 1.2%, respectively. Except rice, the global price of the above commodities are higher than they were the same period last year. The FAO food price index shows similar trends with cereal prices showing upward trends over April and May, although the overall food price index fell by 0.6% from April, largely driven by a fall in the prices of vegetable oil and dairy price indices.[26] The rise in commodity prices is driven a by myriad of factors, including a fall in commodity outputs, rising transport costs due to rising fuel prices, as well as trade restrictive measures adopted by many countries in response to the food crisis. The production of a majority of cereals are expected to fall (the largest being maize followed by wheat and rice)[27] driven by the climatic shocks as well fertilizer shortages resulting from the Russian-Ukraine war.[28] Thus, FAO estimates that supply and demand of cereals including production, utilization, and stocks are likely to fall over the next one year.

IGC commodity price indices

		GOI	Wheat	Maize	Rice	Soybeans
2021	May	**287.2**	240.0	308.2	188.4	292.1
	June	**275.3**	238.2	292.8	182.7	276.2
	July	**271.8**	242.4	275.2	170.3	276.6
	August	**276.3**	264.8	271.9	165.6	274.8
	September	**279.3**	274.9	272.6	166.3	275.6
	October	**279.8**	288.6	276.3	167.7	264.1
	November	**283.2**	303.4	278.7	165.9	260.5
	December	**285.6**	297.8	283.1	163.9	269.2
2022	January	**294.5**	288.4	294.2	166.8	288.9
	February	**315.4**	295.4	310.4	167.8	323.0
	March	**353.4**	353.6	369.7	169.6	344.0
	April	**349.6**	354.8	358.9	171.6	336.0
	May	**351.3**	374.4	348.3	177.1	332.1

(.. January 2000 = 100 ....)

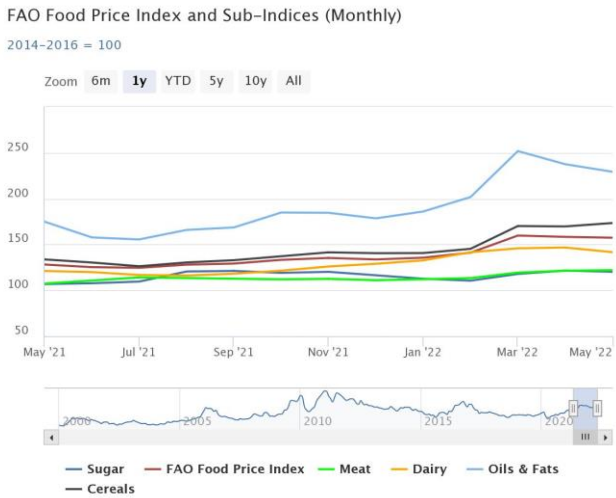


Figure 9: Global Commodity Prices, June 2022[29]

East Africa

Key drivers of commodity prices in EA[30]

Weather Shocks

Atypical droughts, that has not been seen in the last 40 years, has hit Kenya, Ethiopia, and South Sudan, which is crippling crop outputs and resulting in higher food prices in the region.

Conflicts

Compounding the climatic shocks are conflicts and insecurity in the East African region which are not allowing cropping and trading activities.

[26] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[27] https://www.fao.org/worldfoodsituation/csdb/en/
[28] AMIS. Accessed at http://www.amis-outlook.org/fileadmin/user_upload/amis/docs/Market_monitor/AMIS_Market_Monitor_current.pdf on 30 June 2022
[29] AMIS. Accessed at http://www.amis-outlook.org/indicators/prices/en/ on 30 May 2022
[30] RATIN, 19 April 2022. Accessed at: https://ratin.net/site/news_article/11560; FEWSNET 3 May 2022. https://fews.net/east-africa

Macroeconomic Shocks

The global food and fuel crisis driven by the spill-over effects of the Russian-Ukraine war as well as the post-COVID effects, is having a heavy toll on most domestic food prices in East Africa.

Maize prices have remained well above their 3-12 months levels, except in Nairobi (see table 2). Compared to the past one-month, maize prices have dipped in selected markets in Ethiopia, Rwanda, Nairobi (Kenya), and Torit (South Sudan). Apart from these, Wau (South Sudan) has also seen lower price than it was 3 and 12 months ago. AGRA's bi-weekly Price and Policy Monitor also found that from mid-May to mid-June, average maize prices have increased by 14.8% in Kenya and 11.5% in Uganda, whereas Rwanda has experienced about 11% price drop within the same period. The East African region has been one of the most hit by unfavourable climatic conditions, which has not been seen in the last 40 years. This is further worsened by the insecurity and conflicts that has disrupted agriculture and trading activities, and compounded by the effects of the rising fuel and fertilizer prices due to the Russia-Ukraine war.[31] Available data for Tanzania shows that projected prices would dip in the next 3-6 months period when new harvest are expected to arrive.

Table 2: Changes in maize prices in selected East African Countries[32]

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	23.13	-2.65 ↘	5.71 ↑	2.89 ▲	70.95 ⊗		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG***	25.00	-1.46 ↘	7.76 ↑	4.17 ▲	72.41 ⊗		
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG**	37.88	13.31 ↑	15.84 ⊗	32.08 ⊗	38.20 ⊗		
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG***	25.03	-37.49 ↓	-23.20 ↓	-25.97 ↓	-30.38 ↓		
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	292.29	19.25 ⊗	36.27 ⊗	57.23 ⊗	54.85 ⊗		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	409.27	0.63 ▲	3.25 ▲	16.06 ⊗	8.74 ↑		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	423.28	17.65 ⊗	111.43 ⊗	32.14 ⊗	23.33 ⊗		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	243.10	-15.00 ↓	21.43 ⊗	61.90 ⊗	10.39 ↑		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	283.71	7.47 ↑	-0.80 ↘	2.59 ▲	-0.80 ↘		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	80056.00	11.11 ↑	31.24 ⊗	63.24 ⊗	74.99 ⊗	-28.22 ↓	-35.24 ↓
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	75384.00	13.02 ↑	22.94 ⊗	59.12 ⊗	99.69 ⊗	-39.83 ↓	-41.08 ↓
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	65277.00	16.61 ⊗	7.90 ↑	34.30 ⊗	66.04 ⊗		
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	65340.00	7.59 ↑	9.84 ↑	40.37 ⊗	43.36 ⊗	-6.78 ↓	
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	83750.00	17.96 ⊗	38.01 ⊗	44.40 ⊗	46.08 ⊗	-16.37 ↓	-25.68 ↓
Uganda	Maize (white)	Kabale, Wholesale, Uganda Shilling/kg	1365.58	6.92 ↑	25.11 ⊗	21.98 ⊗	123.15 ⊗		
Uganda	Maize (white)	Kampala, Wholesale, Uganda Shilling/kg	1248.98	5.82 ↑	33.13 ⊗	13.69 ↑	81.85 ⊗		
Uganda	Maize (white)	Lira, Wholesale, Uganda Shilling/kg	1190.64	2.54 ▲	36.69 ⊗	20.43 ⊗	97.37 ⊗		
Uganda	Maize (white)	Masindi, Wholesale, Uganda Shilling/kg	1199.21	5.48 ↑	41.25 ⊗	21.55 ⊗	95.81 ⊗		

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

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

The prices of beans in May show a decline in most selected markets of Rwanda and in urban Arusha and Morogoro, but higher in all other markets, compared to the past April prices. Mostly, beans prices are higher than they were 3-12 months ago except in a few markets such as Arusha, Mugera, Kigeme, Dodoma, and Moshi, where prices have declined compared to some specific periods. Below-average rainfalls, coupled with

[31] https://fews.net/east-africa
[32] Author's construction based on data from WFP (2022) and FAO (2022)

deteriorating macroeconomic situations in the East African region, continue to drive up prices. Forecasts for the next 3-6 months looks bright as prices are expected to reduce due to new harvest within this period.

Table 3: Changes in bean 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*
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	170000.00	-0.58	-5.08	10.72	12.58	-0.32	-5.58
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	199545.00	5.02	8.05	0.30	-5.00	-0.88	-1.71
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	166667.00	37.17	33.33	26.87	22.32	-43.02	-35.27
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	193750.00	-4.46	2.96	4.73	2.42	3.16	-100.00
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	190000.00	2.43	2.70	5.07	-4.54	-2.98	-6.35
Uganda	Bean (dry)	Kampala, Wholesale, Uganda Shilling/kg	2694.75	15.26	49.49	73.58	11.14		
Uganda	Bean (dry)	Lira, Wholesale, Uganda Shilling/kg	2499.95	15.42	74.11	66.38	14.57		

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

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

The prices of all types of sorghum in Addis Ababa, Ethiopia are higher than they were 1-12 months ago with the exception of white sorghum, which is lower than it was 6 months ago. In Rwanda, sorghum prices in selected markets depicted more favourable trends in terms of decline, stable, and low-moderate decrease in prices in most markets compared to the past 1-6 months. Generally, the current price remains well above the one-year level, while in Nyabiheke (camp) prices have been higher than the past 1-, 6-, and 12-months levels. Rwanda generally has a favourable stock availability due to fast-maturing vegetable crops from season B as well as favourable rains. In South Sudan, sorghum prices are higher in Aweil and Wau compared to the past 1-12 months, while in Juba and Rumbek, current price is lower than in the past one month. The prices of sorghum in Rumbek are also lower compared to 3 and 12 months ago. Supply tightening due to poor harvests resulting from four consecutive failed rainy seasons continue to drive up commodity prices in the region.

Table 4: Changes in sorghum 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*
Ethiopia	Sorghum (red)	Addis Ababa, Ethiopian Birr/KG	28.15	3.30	7.52	23.74	65.59		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG	32.05	3.72	1.47	-7.07	33.13		
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	292.29	40.77	90.67	229.68	29.86		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	410.41	-3.37	3.01	14.98	6.38		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	235.95	-10.81	-25.00	26.92	-31.59		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	343.20	20.97	22.70	41.18	6.10		

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

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

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

Southern Africa

***Key drivers of maize prices in the Southern Africa region*[35]**

	Harvests	New harvests in the southern region are improving availability of grain stocks and helping bring down prices.
	Conflicts	Conflicts and insecurity persist in Mozambique, extending disruptions in agricultural and trading, and hampering price recovery from the new harvests.
	Macroeconomic	Macroeconomic conditions continue to worsen in the region, particularly in Malawi marked by low forex reserves and increasing inflationary pressures.

Maize prices have begun to improve in terms of decrease in the southern region, particularly in Mozambique. Compared to the past one month, prices of maize have dropped or remained stable in most selected markets in Mozambique, Malawi and Zambia except in Mzuzu and Massinga where prices have risen by less than 2%. In Maputo and Angonia, current prices are even lower than their 3-12 months levels. AGRA's Price and Policy monitor further corroborated this findings by showing that between 2-16 June, maize price dropped by 26.7% in Mozambique, while in Zambia maize price also dropped by 0.6% over similar period. In Malawi and Zambia, however, current prices still remain above their levels in the past 3-12 months. The drop in current maize prices in the region is largely due to on-going new harvests, although the drops could have been larger were it not for poor rainfall, and conflicts in some areas of the region. Also, macroeconomic conditions in Malawi are driving inflationary pressures.

***Table 5: Changes in maize prices in selected Southern African Countries*[36]**

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Malawi	Maize (white)	Lilongwe, Retail, MWK/KG**	200.00	0.00	15.39	48.15	31.15		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	176.67	-5.02	31.84	74.92	46.31		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	183.33	1.85	5.97	59.42	50.58		
Malawi	Maize (white)	National Average, Retail, MWK/KG	204.00	-2.39	8.51	39.73	60.95		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	220.00	0.00	4.76	37.50	57.14		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	11.05	-59.07	-59.29		-21.07		
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	23.62	-2.76	-10.63	-8.13	-16.21		
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	31.91	1.51	-0.75	-3.07	78.24		
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	3.99	-0.75	8.42	36.18	28.30		

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

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

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

West Africa

Key drivers of the price movements in West Africa include[37]:

Insecurity & Armed Conflicts	Insecurity and armed conflicts persist in parts of the region, affecting agricultural and trading activities in the region and driving up food prices.
Economic Shocks	The continuing spill-over effects of COVID-19 and the global food and fuel price crisis continue to drive up commodity prices in the West African region. In addition, depreciation of local currency as well ban on exports of grains have contributed towards higher prices in the region.

The rise in maize prices has slowed down in the West African region as a result of dry season harvests. Maize prices have particularly declined in most selected markets in Togo, except in Lome, over the past one month. Similarly, in Nigeria, maize prices have either declined or the rate of increase has been very minimal over the past one month. Generally, current maize prices in the region remain well above their levels in the last 3-12 months, except in Nigeria and Togo where they have declined or had low increases (0-5%) in some markets compared to their levels 3 months ago. Forecasts show good prospects for the next 3-6 months due to harvests, although this could be neutralized by the increase in the prices of agricultural inputs, insecurity and armed conflicts in the region.

Table 6: Changes in maize prices in selected West African countries[38]

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	291.25	-2.92	12.48	22.63	1.30	-5.33	-3.52
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	488.89	12.82	56.03	50.69	86.44		
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG	339.08	0.02	37.87	37.87	85.71		
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	511.40	18.43	50.00	20.87	72.06		
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	328.00	-2.09	47.75	43.57	57.93		
Mali	Maize (white)	Ansongo, Retail, XOF/KG	325.00	-7.14	15.66	25.00	44.44	-8.11	1.81
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	320.00	6.67	21.67	28.00	42.22		
Mali	Maize (white)	Faladié, Retail, XOF/KG	345.00	17.35	38.00	40.82	72.50	-24.98	-16.41
Mali	Maize (white)	Gao, Retail, XOF/KG	350.00	0.00	6.71	24.56	55.56		
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	400.00	6.67	29.03	45.45	60.00	-18.24	-8.70
Mali	Maize (white)	Niarela, Retail, XOF/KG	335.00	3.08	34.00	34.00	67.50	-19.52	-11.58
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	250.50	0.20	3.73		13.86		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	231.17	0.30	-4.58	38.82	13.07		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	237.90	-0.84	-2.78	37.44	30.11		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG**	261.25	2.77	13.59	33.63	22.65		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	198.00	-10.81	-12.00	17.33	2.86		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	305.00	0.00	1.67	22.98	32.61		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	265.00	-1.49	4.74	25.00	6.00		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	265.00	-1.49	3.92	26.19	6.00		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	270.00	-3.57	0.37	33.66	1.89		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	310.00	-6.06	-11.43	24.00	14.81		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	370.00	37.04	45.10	68.18	60.87		

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

[37] FEWSNET, 2022. Accessed at https://fews.net/west-africa on 3rd May 2022.
[38] 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%)

Millet prices show similar trends like maize, with prices either dipping or with low to moderate increases of not more than 8% in all selected markets over the past one month. Niger and Nigeria shows similar trends compared to the last 3-month prices as well. Again, current prices are well-above their recorded levels in 3-12 months ago in most selected markets. Similar contributing factors for maize accounts for these trends.

Table 7: Changes in millet prices in selected West African countries[39]

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	364.00	-2.41 ↘	38.40 ⊗	19.34 ⊗	24.66 ⊗		
Burkina Faso	Millet	Bousse, Retail, XOF/KG	341.00	0.59 ▲	21.35 ⊗	46.98 ⊗	36.40 ⊗		
Burkina Faso	Millet	Dori, Retail, XOF/KG	415.00	-5.47 ↓	22.06 ⊗	17.23 ⊗	49.28 ⊗		
Burkina Faso	Millet	Faramana, Retail, XOF/KG	307.00	1.32 ▲	31.20 ⊗	58.25 ⊗	93.08 ⊗		
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	399.00	1.01 ▲	33.00 ⊗	46.69 ⊗	71.98 ⊗		
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	411.00	-1.44 ↘	14.80 ↑	33.88 ⊗	69.83 ⊗		
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	305.00	-5.28 ↓	16.86 ⊗	18.68 ⊗	25.51 ⊗		
Burkina Faso	Millet	Titao, Retail, XOF/KG	401.00	5.53 ↑	44.77 ⊗	57.25 ⊗	125.28 ⊗		
Mali	Millet	Ansongo, Retail, XOF/KG	370.00	-1.33 ↘	13.85 ↑	43.41 ⊗	64.44 ⊗		
Mali	Millet	Badalabougou, Retail, XOF/KG	430.00	7.50 ↑	40.52 ⊗	68.63 ⊗	115.00 ⊗		
Mali	Millet	Faladié, Retail, XOF/KG	400.00	6.67 ↑	33.33 ⊗	66.67 ⊗	100.00 ⊗		
Mali	Millet	Gao, Retail, XOF/KG	425.00	3.66 ▲	21.43 ⊗	53.99 ⊗	60.38 ⊗		
Mali	Millet	Kayes Centre, Retail, XOF/KG	400.00	3.09 ▲	18.34 ⊗	31.58 ⊗	33.33 ⊗		
Mali	Millet	Niarela, Retail, XOF/KG	400.00	0.00 ●	33.33 ⊗	56.86 ⊗	100.00 ⊗		
Niger	Millet	Abalak, Retail, XOF/KG	360.93	-2.45 ↘	-2.71 ↘	24.46 ⊗	7.74 ↑	11.31 ↑	
Niger	Millet	Bonkaney, Retail, XOF/KG	330.00	3.77 ▲	6.45 ↑	10.00 ↑	12.24 ↑		
Niger	Millet	Goure, Retail, XOF/KG	338.00	-2.87 ↘	-5.32 ↓	12.67 ↑	14.97 ↑		
Niger	Millet	Katako, Retail, XOF/KG	337.00	0.00 ●	7.32 ↑	14.63 ↑	14.63 ↑	2.53 ▲	9.23 ↑
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	280.00	4.48 ▲	12.00 ↑	0.00 ●	18.64 ⊗		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	249.52	4.30 ▲	4.35 ▲	35.28 ⊗	24.23 ⊗		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	237.80	-0.88 ↘	-0.34 ↘	32.18 ⊗	15.35 ⊗		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	275.00	3.23 ▲	6.49 ↑	12.24 ↑	10.44 ↑		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	237.50	-0.21 ↘	3.26 ▲	14.46 ↑	15.85 ⊗		

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

● = 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 remain very high and above their levels from 3-12 months ago. Compared to the past month (April), prices have dropped in Ansongo but remained static in Gao. The impact of ECOWAS sanctions, insecurity, and the spill-over effect of the Russia-Ukraine war as well as the global food and fuel price shocks continue to drive poor economic performance in Mali. Available forecasts show a decline in prices in the next 3-6 months as new harvests kick in. In Niger and Nigeria, sorghum prices in most selected markets are generally lower or low-moderately higher (0-15%) than they were in 1-6 months ago but remained higher than a year ago. In Togo, except Anie where prices remained unchanged compared to the past 1-3 months, the current (May) price is higher than those of 1-12 months ago.

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

Table 8: Changes in sorghum 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*
Mali	Sorghum	Ansongo, Retail, XOF/KG	350.00	-6.67	40.00	44.03	75.00	-27.81	-25.53
Mali	Sorghum	Badalabougou, Retail, XOF/KG	380.00	8.57	26.67	52.00	90.00		
Mali	Sorghum	Faladié, Retail, XOF/KG	390.00	15.38	30.00	69.57	95.00		
Mali	Sorghum	Gao, Retail, XOF/KG	400.00	0.00	60.00	60.00	60.00	-36.11	-34.19
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	400.00	3.09	25.00	53.85	60.00		
Mali	Sorghum	Niarela, Retail, XOF/KG	375.00	5.34	25.00	63.04	87.50		
Niger	Sorghum	Abalak, Retail, XOF/KG	307.64	-12.60	-10.57	4.28	-4.16		
Niger	Sorghum	Bonkaney, Retail, XOF/KG	312.00	1.63	8.33	12.23	21.40	-6.69	-1.20
Niger	Sorghum	Goure, Retail, XOF/KG	288.00	-13.51	-16.52	5.49	14.29		
Niger	Sorghum	Katako, Retail, XOF/KG	320.00	2.24	8.84	14.29	24.03	-2.58	5.54
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	283.50	-0.04	9.67	1.25	28.86		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	222.35	-4.58	-2.12	-1.25	16.25		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	246.40	-2.14	-3.45	-0.92	24.60		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	267.00	-0.07	3.69	-4.09	23.61		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	220.00	-1.79	1.15	15.03	23.94		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	295.00	0.00	0.00	7.27	5.36		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	310.00	24.00	26.53	40.91	24.00		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	315.00	12.50	14.55	12.50	6.78		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	300.00	17.65	21.46	30.43	20.00		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	325.00	1.56	1.56	3.17	8.33		

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

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

[40] 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, drought conditions are expected to worsen over the July-August-September (JAS) season (Figure 11 and FSNWG March Edition).[41] Weak seasonal rainfalls are expected over much of Tanzania, Kenya, Uganda, DRC, and the southern parts of South Sudan and Ethiopia. However, above-normal rainfall is expected over central Ethiopia, the north-eastern side of South Sudan, and most parts of Sudan during the season. The widespread drought, which persists over the greater part of the East African region has caused weak agro-pastoral outputs. The greater part of the region is expected to experience food insecurity driven by the knock-on effects of the Covid-19 pandemic, deteriorating macroeconomic conditions, including high food and fuel prices, the invasion of the desert locust, and conflicts and insecurity in the region, with Ethiopia and Somalia most likely to experience a catastrophic food crisis in the coming months. Experts[42] warned that a fifth consecutive season of drought this year could cause catastrophic food security outcomes in the region.

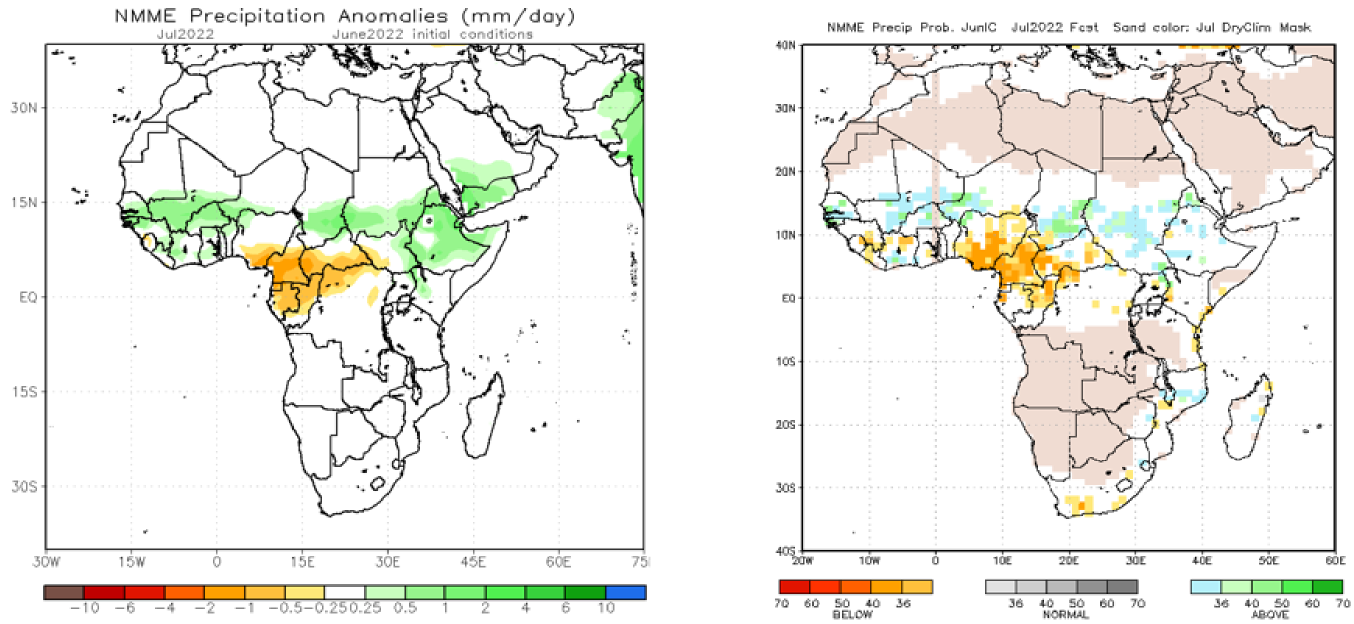


Figure 10: North American Multi-Model Ensemble (NMME) rainfall forecast for July 2022 based on June 2022 initial conditions[43]

In Southern Africa, dry conditions are expected to persist from July to September. Improved food security conditions are observed over the region following the recent harvests. However, the full effect of the new harvests would be negated by the general rise in food and fuel prices and conflicts in parts of the region. In conflict-prone regions such as the Cabo Delgado province in Mozambique, the food security situation may worsen due to below-average harvests in these areas.

[41] https://mcusercontent.com/9206ea93bb8c6f35f98cc8ccf/files/793fb0c7-55fd-fd51-cc0e-3ee4f87e3a8e/Presentations_FSNWG_Meeting_30.06.2022.pdf. Accessed 2 July 2022.
[42] In a joint statement by the IGAD Climate Prediction and Applications Center (ICPAC), the Joint Research Centre (JRC) of the European Commission, the Food and Agriculture Organization (FAO), the Famine Early Warning Systems Network (FEWS NET), and the World Food Program (WFP) on 13 June 2022.
[43] 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.

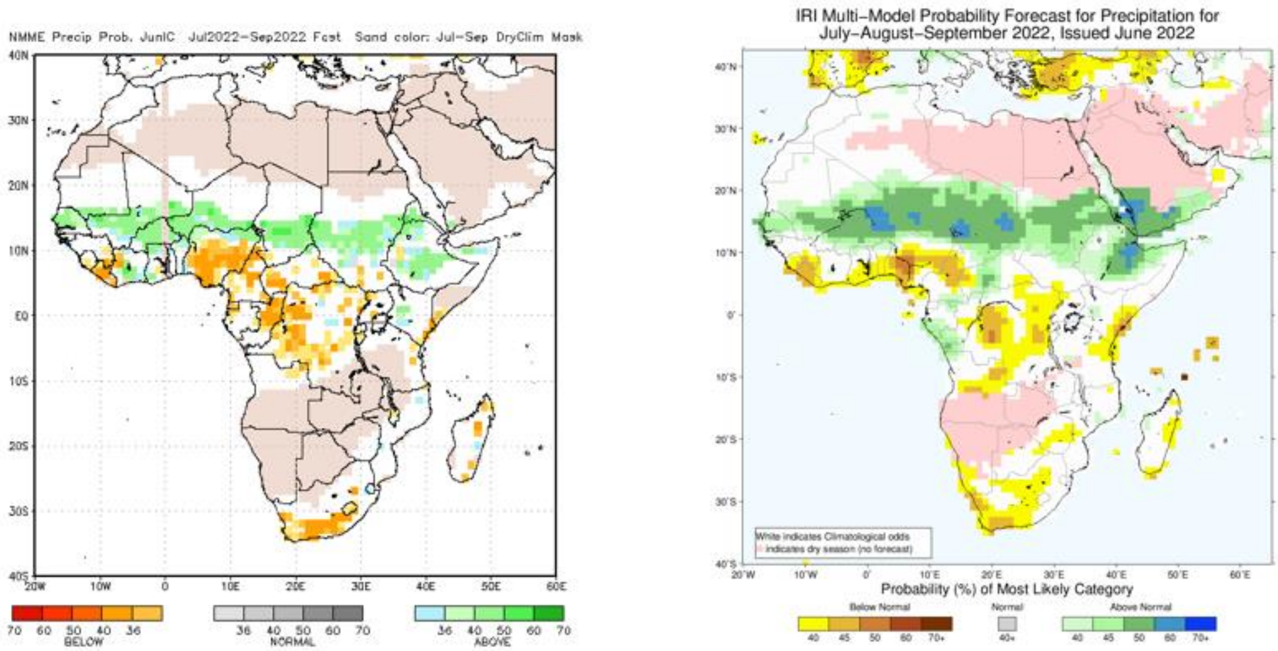


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for the July-September 2022, based on June 2022 initial conditions[44]

The northern areas of the West Africa region, including most parts of Burkina Faso, Mali and Niger, are expected to receive above-normal rains during July-August-September (JAS). North-western Ghana and the northern parts of Togo and Benin are also expected to receive above-normal rains. However, the coastal areas of the region covering all the coastal countries (Sierra Leone, Liberia, Cote d'Ivoire, Ghana, Togo, Benin, and Nigeria) are expected to have below-normal rainfalls. Seasonal prospects look good, with mostly average to above average rainfalls. However, the continuing spill-over effects of COVID-19, the global food and fuel crisis, and the depreciation of the local currencies have contributed towards higher prices and threatened food security outcomes in the region.

[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 April 2022.

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