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AGRA's Food Security Monitor provides an overview assessment of the food security outlook in AGRA focus countries in East, West and Southern Africa, considering the movement of prices of main food staples and government interventions that impact on domestic and regional food trade alongside the impact of forecast weather changes and environmental conditions on food security.

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

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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 July Food Security Monitor are summarised below.

Global Food Security update

Global efforts to tame food prices have begun to bring down food prices as the FAO food price index dropped in July by 13.3 points, a fall of about 8.6%. Global as well as selected African countries' fertilizer prices have also stabilized or declined. Major efforts include the African Development Bank's \$1.5 billion African Emergency Food Production Facility aimed at fast-tracking programs to help Africa mitigate rising food prices and inflation caused by Russia's war in Ukraine, climate change and the COVID-19 pandemic.

Food Security Outlook

The food insecurity hotspots in July 2022 were South Sudan, Burkina Faso, Mali and Niger. The number of people with insufficient food for consumption across all sub-regions of Eastern, Southern, and Western Africa marginally deteriorated between 2-4 % over the reporting period. Persistent internal conflicts and the knock-on effects of the Russia-Ukraine Crisis as well as related macroeconomic spill-over effects are driving IPC 2 (Stressed), IPC Phase 3 (Crisis) and IPC 4 (Emergency) outcomes across the region.

Nonetheless, the Russia-Ukraine grain deal is expected to ease grain market supplies and prices. Also, ongoing or completed seasonal harvests as well as government measures in countries such as Rwanda and Mozambique have lowered or stabilized prices in these countries.

Food Trade

- Seven countries – Rwanda, Tunisia, Cameroon, Egypt, Ghana, Kenya, Mauritius, and Tanzania commenced pilot trading under the AfCFTA framework. The pilot seeks to test the environmental, legal and trade policy basis for intra-African trade¹.
- The Afreximbank has renewed their approval of a US\$1 billion facility to operationalise the AfCFTA adjustment funds. Also, a Trade Finance Funded Risk Participation Agreement facility of \$175 million between the AfDB and Trade & Development Bank (TDB) has been approved to boost intra-Africa trade, promote regional integration, and contribute to the reduction of the trade finance gap in Africa. Meanwhile, IFC has also provided \$9.4 billion in financing to 36 African countries to develop regional pharmaceutical manufacturing, boost intra-Africa trade and strengthen food security.

Commodity Prices

Commodities prices remain well above their 6–12-month levels across the three sub-regions. However, compared to three months ago, some prices have begun to dip particularly in the West African region, as well as in Mozambique and Rwanda following new harvests.

¹ <https://guardian.ng/business-services/afcfta-secretariat-commences-pilot-trading-with-seven-countries/>

Introduction

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

Food Security Dashboard

The Food Security Dashboard is a quick pictorial overview of the changes in the number of people that are food insecure and changes in average food prices. These changes are provided in Table 1 below.

Table 1: Changes in Food Security Situation and Commodities² Price Changes³

Country	% change in the no. of people with insufficient food consumption in the last 6 months	% change in the no. of people with insufficient food consumption in the last 1 year	Average Commodity Price Changes in the last 6 months	Average Commodity Prices Change in the last 1 year
Burkina Faso	-6.09 ↓	8.00 ↑	↑	↑
Cote d'Ivoire	-3.70 ↓	23.81 ↑	↑	↑
Ethiopia	22.29 ↑	13.61 ↑	↑	↑
Ghana	18.52 ↑	8.47 ↑	↑	↑
Kenya	79.41 ↑	52.50 ↑	↑	↑
Malawi	65.22 ↑	72.73 ↑	↑	↑
Mali	-5.04 ↓	11.88 ↑	↑	↑
Mozambique	11.94 ↑	-38.52 ↓	↓	↓
Niger	29.77 ↑	50.44 ↑	↑	↑
Nigeria	-2.13 ↓	-0.36 ↓	↑	↑
Rwanda	8.00 ↑	8.00 ↑	↑	↑
South Sudan	-1.52 ↓	8.33 ↑	↑	↑
Tanzania	25.58 ↑	-3.57 ↓	↑	↑
Togo	0.00 ●	-16.00 ↓	↑	↑
Uganda	7.09 ↑	0.67 ↑	↑	↑
Zambia	4.17 ↑	13.64 ↑	↑	↑
Zimbabwe	3.92 ↑	-8.62 ↓		

Key: ● No Change ↑ = increase ↓ = decrease

The data provided in Table 1 shows that compared to the same period last year (July 2021), most countries except for Mozambique⁴, Nigeria (albeit marginal), Tanzania⁵, Togo and Zimbabwe have recorded an increase in the number of people that are food insecure. Since the beginning of this year (January 2022), the data shows that this upward trend in the number of people that are food insecure persisted across most countries in East and Southern Africa except for South Sudan⁶ where a marginal decrease was recorded. The increase in the number of people that are food insecure in East and Southern Africa since the beginning of the year coincided with the Russia-Ukraine conflict which triggered an increase in global food and energy prices and were also transmitted to several African countries. The resultant price increases reduced affordability and access to food among households in Southern Africa who were dependent on market purchases at the beginning of the year

² Maize is the main commodity *except Burkina Faso and Niger where millet is being tracked*

³ It should be noted that the price changes present here are average price changes over a number of selected markets, which implies that in certain markets prices may actually be higher or lower

⁴ Mozambique was badly affected by climate crisis and insecurity in 2021 which put it under much food security pressure than this year

⁵ The marginal drop in Tanzania, a surplus country, over previous year may be ascribed to increases in food prices last year which limited consumer access to food

⁶ South Sudan may have seen drops in the number of people facing insufficient food consumption over the last 6 months as a result of increased food assistance

before harvesting had started. In addition, in East Africa, poor harvests across most countries impacted households' access to food during this period. Most countries in West Africa recorded a decrease in the number of people that are food insecure since the beginning of the year. The improvements in West Africa can be ascribed to improved supplies from the off-season harvests at the beginning of the year and opening of land borders which led to the resumption of cross-border trade activities which are an important source of income for food access among most low-income households. This helped to offset the impacts of the Russia-Ukraine crisis which was already impacting the East and Southern African regions.

Commodity prices have been increasing since the beginning of the year and have also registered increases compared to same period last year in all countries except Mozambique.

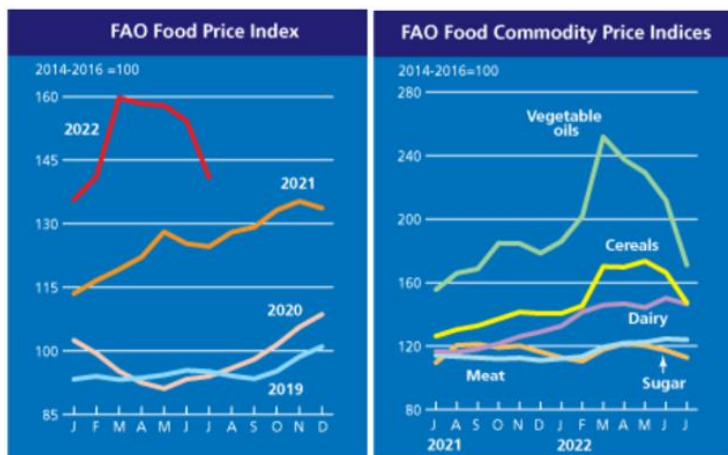
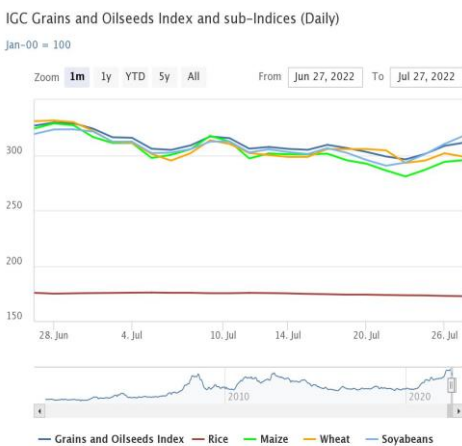
Global Food Security Update

Russia-Ukraine Crisis

The African Development Bank continues to support African countries to manage the impact of the ongoing Russia-Ukraine crisis on African Food Systems and Food Security. Recently the Bank's board of directors approved 24 fast-track programs to help Africa mitigate rising food prices and inflation caused by Russia's war in Ukraine, climate change and the COVID-19 pandemic. Through the \$1.5 billion African Emergency Food Production Facility established in May this year, the bank will provide 20 million African smallholder farmers with certified seeds and increased access to agricultural fertilizers. It will also support governance and policy reform, which is expected to encourage greater investment in Africa's agricultural sector. The initiative is expected to enable African farmers to produce 38 million additional tons of food over the next two years⁷. Respite is also expected under the Russia-Ukraine grain deal, which is expected to ship some grains into Africa.

Global Food Prices

Global food prices have shown a steep dive, with the Food and Agriculture Organization (FAO) food price index showing a drop of 13.3 points representing about 8.6%. The FAO food price index was at a peak of about 160 in March 2022 but has now dropped to about 140 points in July 2022. The FAO vegetable and cereal price indices have had the most drops. According to the International Grains Council price indices, between May and June 2022, wheat, rice, and maize prices declined by 5.7%, 0.2% and 3.5%, respectively, while soybeans registered a marginal decrease of 0.1%. Similarly, the World Food Programme (WFP's) East Africa Food and Trade Update analysis, which was released in July 2022⁸ shows that food prices have been decreasing since March despite the ongoing crisis. The softening of food prices is generally a result of global responses to ease the supply of these commodities including continued efforts to unlocking supply from Russia and Ukraine through the grains deal, and improved harvests in certain regions. Since December 2021, however, the prices of rice have seen a steady increase, except for a minor decline between May and June, and compared to the same period a year ago, the product is cheaper by 3.1%. Nonetheless, the average prices of most grains and soybeans have remained well above their levels a year ago, with wheat seeing the most significant rise by 48.5%. Additionally, minor surges in prices have been observed between July 22nd and July 27th.



⁷ <https://www.afdb.org/en/news-and-events/press-releases/african-development-bank-group-board-approves-more-1-billion-emergency-food-production-plan-53584>

⁸ https://mcusercontent.com/9206ea93bb8c6f35f98cc8ccf/files/9e0453ff-6be6-bcbb-dc71-bb5aaab9872a/East_Africa_Market_and_Trade_Bulletin_2022Q2.pdf

IGC commodity price indices

		GOI	Wheat	Maize	Rice	Soybeans
2021	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	352.6	375.3	347.9	177.3	334.3
	June	343.3	353.8	335.7	177.0	334.1

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

IGC commodity price indices

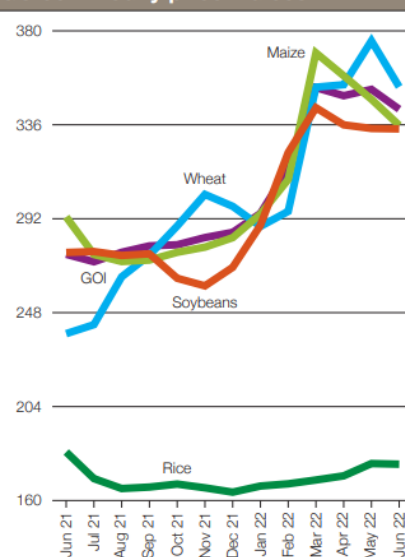
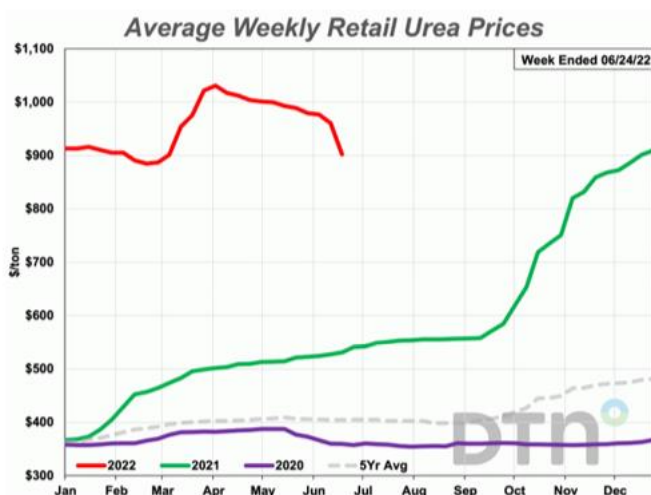


Figure 1: Global Commodity Prices, June/July 2022⁹

Global Fertiliser Prices

The average global fertilizer prices have declined from their levels in May compared to June except for potash and phosphate. Urea prices have been declining since April 2022 and are now almost at parity with their December 2021 prices. This decrease in prices is attributed to reduced seasonal demand for fertilizer in most parts of the globe, where the planting season has passed. In some African countries, such as Rwanda, Uganda, and Tanzania, where data is available on AfricaFertilizer.org, the prices of urea have largely remained stable or recorded a minor increase or decline towards the end of May. This data source also re-corroborates the declining trend of the average global urea prices. AGRA's own price data collection over the last three months shows that fertilizer prices in most focus countries have either remained unchanged or have seen moderate increases of less than 5%, except for urea prices in Nigeria and Kenya (see table1). These trends are largely influenced by government interventions in the form of subsidies to make the input affordable to farmers.



Date Range	DAP	MAP	POTASH	UREA
Jun 21-25 2021	670	720	469	541
Jul 19-23 2021	695	750	543	553
Aug 16-20 2021	695	755	564	556
Sep 13-17 2021	702	776	598	572
Oct 11-15 2021	798	860	710	719
Nov 8-12 2021	821	906	762	832
Dec 6-10 2021	840	919	778	887
Jan 3-7 2022	863	931	807	913
Jan 31-Feb 4 2022	877	933	813	905
Feb 28-Mar 4 2022	879	937	815	887
Mar 28-Apr 1 2022	1033	1045	868	1022
Apr 25-29 2022	1049	1082	881	1004
May 23-27 2022	1056	1082	879	989
Jun 20-Jun 24 2022	1040	1058	885	902

Source: DTN

⁹ AMIS. Accessed at <http://www.amis-outlook.org/indicators/prices/en/> on 7th August 2022

World Bank Commodities Price Data (The Pink Sheet)

5-Jul-2022

Commodity	Unit	Annual Averages			Quarterly Averages				Monthly Averages			
		Jan-Dec	Jan-Dec	Jan-Dec	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Apr	May	Jun
		2019	2020	2021	2021	2021	2021	2022	2022	2022	2022	2022
DAP	\$/mt	306.4	312.4	601.0	574.3	620.0	714.9	794.9	860.1	954.0	842.5	783.8
Phosphate rock	\$/mt b/	88.0	76.1	123.2	107.5	136.5	159.1	174.8	264.0	249.5	255.0	287.5
Potassium chloride	\$/mt b/	255.5	217.8	210.2	202.5	214.8	221.0	391.8	562.5	562.5	562.5	562.5
TSP	\$/mt b/	294.5	265.0	538.2	518.5	561.3	656.6	718.8	810.0	856.0	827.5	746.5
Urea, E. Europe **	\$/mt b/	245.3	229.1	483.2	351.0	435.7	828.5	821.0	774.2	925.0	707.5	690.0

Figure 2: Global Fertilizer Prices, June/July 2022

Table 1: Changes in fertilizer prices in selected African Countries¹⁰

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Kenya	DAP	National, USD per ton**	1,065.00	1.14 ▲			
Kenya	Urea	National, USD per ton**	1,233.00	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**	1,000.00	6.61 ↑			
Uganda	DAP	National, UGX/50KG	225,000.00	0.00 ●			
Uganda	Urea	National, UGX/50KG	220,000.00	0.00 ●			
Mozambique	NPK	National, MZN/50kg	3,075.00	4.24 ▲			
Mozambique	Urea	National, MZN/50kg	3,650.00	4.29 ▲			
Zambia	NPK	National, Kwacha/50kg	793.75	-6.71 ↓			
Zambia	Urea	National, Kwacha/50kg	926.45	-3.08 ▾			
Burkina Faso	NPK 14 23 14	National, USD per ton	575.00	-4.17 ▾			
Burkina Faso	NPK 15 15 15	National, USD per ton	575.00	-4.17 ▾			
Burkina Faso	Urea	National, USD per ton	4,500.00	0.00 ●			
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**	1,026.00	-2.75 ▾			
Ghana	NPK 23 10 5	National, USD per ton**	1,058.00	-5.96 ↓			
Ghana	Urea	National, USD per ton**	1,217.00	-7.31 ↓	-12.70 ↓	15.79 ⊗	
Mali	NPK 15 15 15	National, USD per ton**	1,045.00	0.77 ▲			
Mali	Urea	National, USD per ton**	1,079.00	0.65 ▲	-3.40 ▾	-26.65 ↓	
Nigeria	NPK 15 15 15	National, USD per ton**	1,220.00	2.61 ▲			
Nigeria	NPK 20 10 10	National, USD per ton**	1,112.00	3.06 ▲		100.36 ⊗	
Nigeria	Urea	National, USD per ton**	922.00	15.39 ⊗	18.81 ⊗	66.13 ⊗	

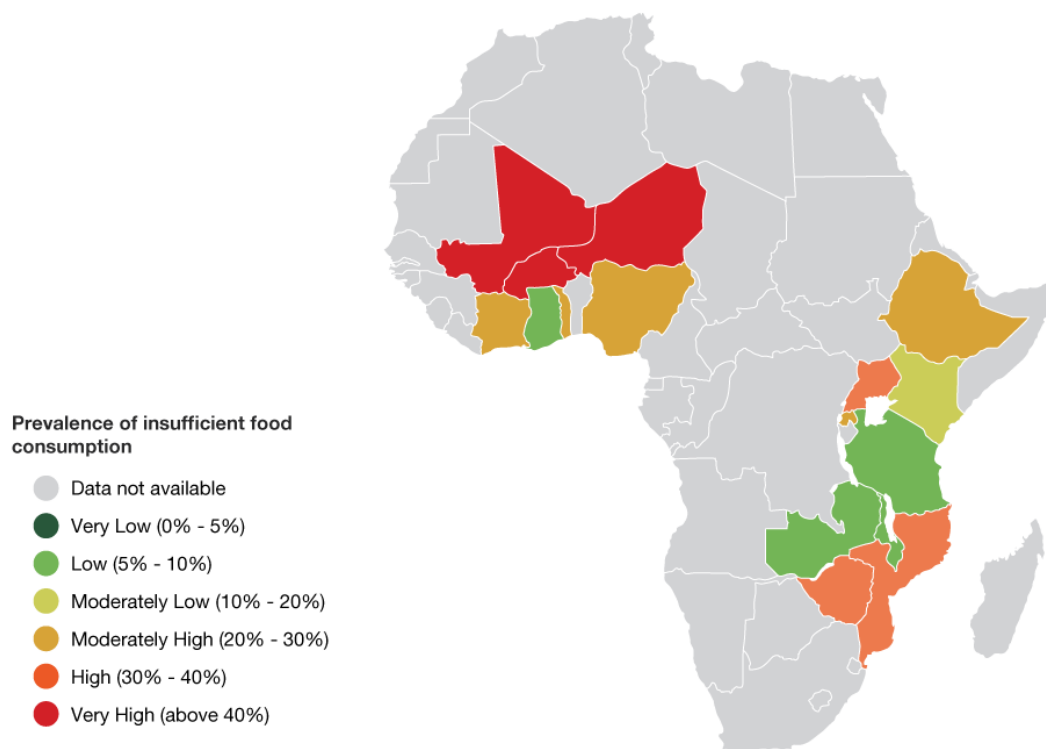
Note: Last price is for June 2022, *July, **May, ***April, and ****March

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

¹⁰ Author's construction based on data from AfricaFertilizer.org and national prices collected by AGRA

Food Insecurity and Hunger Hotspots Snapshot

Figure 3 provides a status update of the prevalence of insufficient food consumption¹¹ across 17 selected East, Southern and West African countries in July. 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 (59.1%), Burkina Faso (54.6%), Mali (59.2%) and Niger (75.9%). Uganda, Zimbabwe and Mozambique are on the boundary, with between 30 and 40 percent prevalence of insufficient food consumption.



Source: Own analysis based on data from WFP (2022)¹²

Figure 3: Prevalence of Insufficient Food Consumption, June 2022¹³

¹¹ **People with insufficient food consumption refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS).** The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets, and how frequently food is consumed. The FCS is calculated using the frequency of consumption of eight food groups by a household during the 7 days before the survey using standardized weights for each of the food groups reflecting its respective nutrient density, and then classifies households as having 'poor', 'borderline' or 'acceptable' food consumption. **Poor food consumption:** Typically refers to households that are not consuming staples and vegetables every day and never or very seldom consume protein-rich food such as meat and dairy (FCS of less than 28). **Borderline food consumption:** Typically refers to households that are consuming staples and vegetables every day, accompanied by oil and pulses a few times a week (FCS of less than 42). **Acceptable food consumption:** Typically refers to households that are consuming staples and vegetables every day, frequently accompanied by oil and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

¹² <https://hungermap.wfp.org/>. Accessed 30 May 2022

¹³ <https://hungermap.wfp.org/>. Accessed 30 May 2022

East Africa Food Security Update

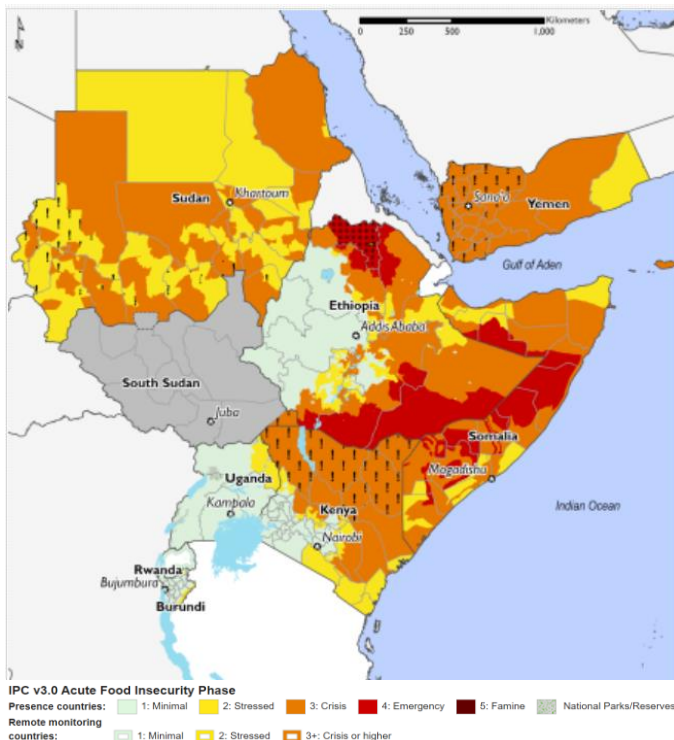


Figure 4: East Africa countries Food Security Outlook, Jun-Sep 2022

Conflict, weather, and economic shocks are likely to drive an alarming increase in humanitarian needs. Macroeconomic shocks linked to domestic cereal shortages, coupled with restrictions from global supply chains have been exacerbated by shortages of fuel supply leading to high food prices across most of the region. The on-going Russia-Ukraine Conflict continues to worsen food security for countries in the region due to the relatively high levels of wheat consumption in the region and the heavy reliance on imports from Russia and Ukraine to meet domestic demand in these countries.

Ethiopia: Food aid remains insufficient amid very high levels of hunger and malnutrition, driven by the impacts of prolonged drought and ongoing insecurity. This is resulting in Emergency (IPC Phase 4) and Crisis (IPC Phase 3) outcomes, which will likely be widespread in northern, central, southern, and southeastern Ethiopia until at least January 2023¹⁴.

Rwanda: The July Season B harvest is enhancing food availability, leading to IPC Phase 1 (Minimal) outcomes across rural areas. However, IPC Phase 2 (Stressed) outcomes are expected from October and November as the country enters its lean season, where households depend on purchases

for food supply. The country is projected to have a below-average Irish potato production in the Northern region due to reduced planted acreage resulting from the high costs of inputs¹⁵.

Uganda: Below-average first season harvests due to poor rainfall and resultant price increases are leading to atypically high levels of food insecurity. The high temperatures in many northern, central, southwestern, and eastern areas in June and July have resulted in a 30 percent loss in maize due to wilting. This has seen the country experience widespread IPC Phase 2 and IPC Phase 3 outcomes¹⁶.

Prevalence of insufficient food consumption¹⁷

As of 30 July 2022, 61.1 million people across six selected East African countries did not have sufficient food for consumption. This represents a 2.4 % decrease from June 2022, indicating that the food security situation deteriorated across these focus countries over the past month. In January this year and July last year, this number stood at 50 million and 54 million people, respectively indicating that the food security situation across these selected countries has worsened since the beginning of the year, and when compared to the same period

¹⁴ <https://fews.net/east-africa/ethiopia>

¹⁵ <https://reliefweb.int/report/rwanda/rwanda-key-message-update-food-availability-enhanced-season-b-harvest-high-prices-persist-july-2022>

¹⁶ <https://fews.net/east-africa/uganda/key-message-update/july-2022>

¹⁷ **People with insufficient food consumption refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS).** The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets, and how frequently food is consumed. The FCS is calculated using the frequency of consumption of eight food groups by a household during the 7 days before the survey using standardized weights for each of the food groups reflecting its respective nutrient density, and then classifies households as having 'poor', 'borderline' or 'acceptable' food consumption. **Poor food consumption:** Typically refers to households that are not consuming staples and vegetables every day and never or very seldom consume protein-rich food such as meat and dairy (FCS of less than 28). **Borderline food consumption:** Typically refers to households that are consuming staples and vegetables every day, accompanied by oil and pulses a few times a week (FCS of less than 42). **Acceptable food consumption:** Typically refers to households that are consuming staples and vegetables every day, frequently accompanied by oil and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

last year. Table 2 provides updates on how the prevalence of insufficient food consumption changed across each of the selected East African countries during the month.

Table 2: Prevalence of insufficient food consumption across selected East African countries (Jul 2022)¹⁸

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 (%)	Change in people with insufficient food consumption from Jan 2022	Change in people with insufficient food consumption from Jul 2021
Ethiopia	109.20	24.10	19.20	17.58	-20.33	22.29	↗ 13.61 ↗
Kenya	51.40	7.80	12.20	23.74	56.41	↑ 79.41	↑ 52.50
Rwanda	12.30	2.80	2.70	21.95	-3.57	8.00	↑ 8.00
South Sudan	11.00	6.70	6.50	59.09	-2.99	-1.52	↑ 8.33
Tanzania	56.30	5.10	5.40	9.59	5.88	↑ 25.58	↓ -3.57
Uganda	42.70	16.10	15.10	35.36	-6.21	7.09	↑ 0.67

*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%)

Commodity Prices

Key drivers of commodity prices in EA¹⁹



Climatic Shocks

Since late 2020, the horn of African continue to experience the worst droughts seen in the last 40 years, with Kenya, Ethiopia, Somalia, and South Sudan being the worst hit. The current rainy season is considered poor due to persistently high heat levels that are above expected thresholds. The drought has led to declines in production, driving up food prices.



Conflicts

Compounding the climatic shocks, are conflicts and insecurity in the East African region, which are deterring cropping and trading activities. The knock-on effects of the Russia-Ukraine conflict has further worsened the situation.



Macroeconomic Shocks

The spill-over effects of the global food and fuel crisis, driven by the Russian-Ukraine war, as well as post-COVID 19 effects, are taking a heavy toll on most domestic food prices in East Africa.

The start of the new harvest season in most East African countries, as well as government efforts aimed at lowering food prices through imports, in addition to prices controls, is expected to slow down maize price increases in the region. For instance, the maize price recorded in Nairobi remains well below what has been seen over the last 1-12 months (see table 3). Nonetheless, prices in most selected markets remain well above their levels from the last year. The region faces a combination of multiple shocks such as climate extremes, conflict, and macroeconomic conditions including high inflation, currency depreciation, the long-running economic impacts of the COVID-19 pandemic, and the escalating Russia-Ukraine Crisis, which are all exacerbating already severe acute food insecurity across the region.²⁰ These challenges are making it difficult for mitigation measures to yield results. Maize prices monitored through AGRA's own data collection shows that the most current (July) prices depict similar trends.²¹ The available forecasts for Kabuga, Rwanda, and some markets in Tanzania show that prices will decrease in the next 3-6 months, when the full effect of the new harvests will be felt. In Rwanda, for instance, harvests from its season B are increasing food availability, and

¹⁸ <https://hungermap.wfp.org/> Accessed 30 Jul 2022

¹⁹ WFP, 2022. East Africa Market and Trade Update; The East African Food Security and Nutrition Working Group (FSNWG) 29th July report; AGRA RFBS Crop Yield Forecast Estimates June 2022.

²⁰ The 2022 Global Report on Food Crisis – Food Security Information Network (FSIN)

²¹ AGRA Price and Policy Monitor, July 2022

are expected to dampen prices.²² However, production forecasts through AGRA's Regional Food Balance Sheet (RFBS) Crop Yield Forecast Report for June 2022 indicate a mixed result, which is too early to call.

Table 3: Changes in maize prices in selected East African Countries²³

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	2,400.00	5.37 ↑	0.67 ▲	5.49 ↑	62.49 ☒		
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG	2,560.00	1.86 ▲	5.93 ↑	6.44 ↑	80.28 ☒		
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	474.31	29.01 ☒	113.17 ☒	19.07 ☒	135.68 ☒	-36.58 ↓	-21.22 ↓
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG	449.74	23.20 ☒	49.91 ☒	13.86 ↑	79.89 ☒		
Rwanda	Maize (white)	Mugera, Retail, RWF/KG	383.33	10.92 ↑	16.16 ☒	14.71 ↑	98.28 ☒		
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	412.98	17.10 ☒	21.30 ☒	29.06 ☒	112.65 ☒		
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	289.43	-0.98 ▾	21.20 ☒	106.11 ☒	39.59 ☒		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	419.28	2.45 ▲	3.09 ▲	15.52 ☒	11.82 ↑		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG	328.90	-22.30 ↓	18.92 ☒	23.26 ☒	-51.06 ↓		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG***	286.00	42.86 ☒	66.67 ☒	100.00 ☒	25.00 ☒		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG**	283.71	7.48 ↑	-0.80 ▾	2.59 ▲	-0.80 ▾		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG**	80,056.00	11.11 ↑	31.24 ☒	63.24 ☒	74.99 ☒	-28.22 ↓	-35.24 ↓
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale,	75,384.00	13.02 ↑	22.94 ☒	59.12 ☒	99.69 ☒	-39.83 ↓	-41.08 ↓
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG**	65,277.00	16.61 ☒	7.90 ↑	34.30 ☒	66.04 ☒		
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG**	65,340.00	7.59 ↑	9.84 ↑	40.37 ☒	43.36 ☒	-6.78 ↓	
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG**	83,750.00	17.96 ☒	38.01 ☒	44.40 ☒	46.08 ☒	-16.37 ↓	-25.68 ↓
Uganda	Maize	Kabale, Wholesale, Uganda Shilling/kg**	1,354,957.00	6.08 ↑	24.14 ☒	21.03 ☒	121.41 ☒		
Uganda	Maize	Kampala, Wholesale, Uganda Shilling/kg**	1,226,636.00	3.92 ▲	30.75 ☒	11.65 ↑	78.60 ☒		
Uganda	Maize	Lira, Wholesale, Uganda Shilling/kg**	1,157,743.00	-0.29 ▾	32.91 ☒	17.10 ☒	91.92 ☒		
Uganda	Maize	Masindi, Wholesale, Uganda Shilling/kg**	1,157,743.00	1.83 ▲	36.37 ☒	17.35 ☒	89.04 ☒		

Note: Last price is for June 2022, *July, **May, ***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%)

Table 4 below presents changes in bean prices over the last 12 months. Bean prices remain well-above their 1-12 months levels in Rwanda, Uganda, and in Kigoma, Tanzania. Some markets in Tanzania such as Arusha, Dodoma, Morogoro, and Moshi, however, show some declines in prices or moderate increases. It is not clear what may be influencing the beans prices in Tanzania, although harvesting from the primary season in the southern part of the country is underway, and may have had some influence on the price changes. In most parts of the region, however, below-average rainfalls are expected to result in poor harvest that would drive prices further up. In the Eastern province of Rwanda, for instance, FEWSNET estimates lower harvests of beans due to poor rain distribution.

²² <https://fews.net/east-africa/rwanda>. Accessed on 7th August 2022

²³ Author's construction based on data from WFP (2022) and FAO (2022)

Table 4: Changes in bean prices in selected East African Countries²⁴

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	458.33	38.26	60.82	107.49	41.91		
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG	581.14	43.36	70.09	75.96	36.74	-41.16	-32.42
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG	419.72	19.99	29.81	60.32	22.25		
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	442.98	22.73	24.68	32.23	21.25		
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG**	170,000.00	-0.58	-5.08	10.72	12.58	-0.32	-5.58
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG**	199,545.00	5.02	8.05	0.30	-5.00	-0.88	-1.71
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG**	166,667.00	37.17	33.33	26.87	22.32	-43.02	-35.27
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG**	193,750.00	-4.46	2.96	4.73	2.42	3.16	
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG**	190,000.00	2.43	2.70	5.07	-4.54	-2.98	-6.35
Uganda	Beans	Kampala, Wholesale, Uganda Shilling/kg**	2,694,747.00	15.26	49.49	73.58	11.14		
Uganda	Beans	Lira, Wholesale, Uganda Shilling/kg**	2,497,141.00	15.29	73.92	66.19	14.44		

Note: Last price is for June 2022, *July, **May, ***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%)

Sorghum prices in the East African region show favourable signals as they only increased moderately in Ethiopia, declined or remained stable in Rwanda, but remained largely higher in South Sudan (table 5). Generally, season B harvests in Rwanda have provided some relief in terms of food availability options to consumers, and have lowered the demand pressures on certain food crops. South Sudan is facing acute/catastrophic food insecurity as it is currently in its lean season and is also battling with insecurity and conflicts, which undermine the ability to move food products across the country.

Table 5: Changes in sorghum prices in selected East African Countries²⁵

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	2,800.00	0.45	6.33	3.99	67.87		
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG**	3,135.00	1.46	1.46	-9.10	30.22		
Rwanda	Sorghum	Kabuga, Retail, RWF/KG**	433.33	-1.89	-16.93	-14.47	-2.90		
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG**	500.00	0.00	0.00	-9.09	0.00		
Rwanda	Sorghum	Mugera, Retail, RWF/KG**	390.00	-1.27	0.86	-6.02	5.41	-16.00	
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG**	400.00	0.00	33.33	0.00	15.94		
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	294.01	0.59	50.07	193.71	62.40		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	420.99	2.58	2.44	12.97	12.45		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	328.90	39.39	64.29	76.92	-8.00		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG**	343.20	20.97	22.70	41.18	6.10		

Note: Last price is for June 2022, *July, **May, ***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%)

Seasonal Monitor and Crop Yield Forecasts

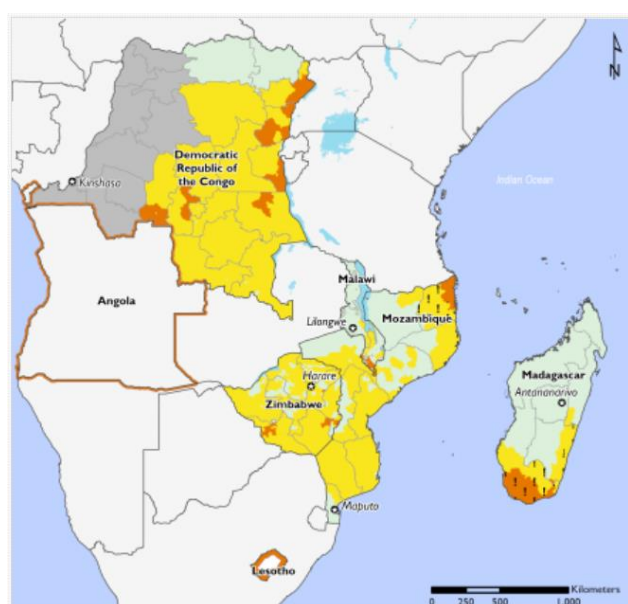
The Food Security and Nutrition Working Group reports very poor cropping conditions and a high likelihood of poor harvests in the horn of Africa. In **Ethiopia**, belg harvests started a month later in July with harvest prospects poor. As of mid-June, between 40-85% of the cropland had been affected by severe drought. Agricultural operations in the Southern Zone of the Tigray Region and in Amhara region continue to be affected by the ongoing security situation, which is limiting the access to agricultural inputs. In **Kenya**, cereal production prospects are projected to be unfavorable, leading to a fourth consecutive poor harvest. According to the latest

²⁴ Author's construction based on data from WFP (2022) and FAO (2022).

²⁵ Author's construction based on data from WFP (2022) and FAO (2022).

Regional Food Balance Sheet crop estimates, crop conditions in the country have significantly worsened since last month, as the Coast, Nyanza, and Rift Valley regions are currently declining, impacted by below average rainfall performance this season and an army worm invasion that impacted parts of the West and Rift Valley as of late May. In **Rwanda**, the maize production forecast continues to be promising as crop growth and development benefit from good rainfall performance this month, despite localized anomalies. In **Tanzania**, the northern area is nearing the end of its second rainy season, while southern Tanzania is nearing the end of its primary season.

Southern Africa Food Security Update



IPC v3.0 Acute Food Insecurity Phase
 Presence countries: 1: Minimal 2: Stressed 3: Crisis 4: Emergency 5: Famine National Parks/Reserves
 Remote monitoring countries: 1: Minimal 2: Stressed 3: Crisis or higher

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

reducing the purchasing power of low-income households in peri-urban areas leading to some households having to adjust their purchasing and consumption patterns, purchasing sweet potatoes or cassava instead of bread, and reducing consumption of fried foods²⁷.

Zimbabwe: Continued depreciation of the local currency is leading to a spike in commodity prices leading to limited access to food for most households across the country who earn income in local currency. Households in deficit producing regions are already experiencing IPC Phase 3 outcomes as the country approaches the lean season earlier than usual due to below-average harvests this year. In surplus-producing regions households continue to enjoy IPC Phase 1 outcomes, which will be sustained through to January 2023 due to carryover stocks from the previous harvest²⁸.

Prevalence of insufficient food consumption

As of 30 July 2022, the number of people with insufficient food for consumption across four selected countries in Southern Africa stood at 19.1 million. This represents a 3.2 percent increase from June 2022, indicating that

²⁶ <https://fews.net/southern-africa/malawi>

²⁷ <https://reliefweb.int/report/mozambique/mozambique-key-message-update-humanitarian-assistance-needs-remain-high-while-fuel-transport-and-bread-prices-increase>

²⁸ <https://fews.net/southern-africa/zimbabwe>

the region's food security situation marginally deteriorated over the reporting period. In January, this year and July last year, these numbers stood at 16.5 million people and 22.4 million people, respectively, indicating that while the food security situation across these selected countries has improved from the same period last year, it has been worsening since the beginning of the year. Table 6 provides an update of how the prevalence of insufficient food consumption changed across each of the selected Southern African countries during the month.

Table 6: Prevalence of insufficient food consumption in selected Southern African Countries (Jul 2022)²⁹

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 (%)	Change in people with insufficient food consumption from Jan 2022	Change in people with insufficient food consumption from Jul 2021
Malawi	18.10	3.30	3.80	20.99	15.15	↗	72.73
Mozambique	29.50	7.40	7.50	25.42	1.35	↑	-38.52
Zambia	17.40	2.40	2.50	14.37	4.17	↑	13.64
Zimbabwe	14.40	5.40	5.30	36.81	-1.85	↓	-8.62

*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%)

Commodity Prices

Key drivers of maize prices in the Southern Africa region³⁰



Harvests

New harvests in the southern region are improving the availability of grain stocks and helping bring down prices.



Conflicts

Conflicts and insecurity persist in Mozambique, extending disruptions in agriculture 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.

Malawi is facing one of the most significant maize price surges in the southern region. According to the Consumer Association of Malawi (CAMA), maize flour (20kg) has surged by 77% from MK8,388 in May to MK14,888 in July³¹ against the backdrop of the government of Malawi's authorization of maize price increases by 46%, through its Agricultural Development and Marketing Corporation (ADMARC).³² Our analysis shows that the current (June) prices in most markets have increased by 60% - 113% compared to one year ago, while between May and June, most markets have had maize price surges of between 19% and 38%. Malawi's maize output is reported to have declined by 18.9% in the 2021/22 farming year due to a combination of factors such as drought, tropical cyclones and inadequate supply of subsidized fertilizer through the Fertilizer Inputs Subsidy programme by the government during the just concluded farming season. It was estimated that production fell from 4.6 million metric tonnes to 3.7 million metric tonnes in the 2020/21 farming season.³³ Malawi's condition is further worsened by poor macroeconomic conditions, which limited post-harvest improvements.³⁴

²⁹ <https://hungermap.wfp.org/> Accessed 30 May 2022

³⁰ FEWSNET, 2022. <https://fews.net/southern-africa>. Accessed 2nd June 2022

³¹ https://ratin.net/site/news_article/11941

³² https://ratin.net/site/news_article/11955

³³ https://ratin.net/site/news_article/11868

³⁴ AGRA RFBS Crop Yield Forecast Estimates June 2022.

Unlike Malawi, Mozambique and Zambia are experiencing lower maize prices currently. The national average maize prices in Zambia are lower than they were 1-3 months ago, but still higher than they were 6-12 months ago. Amidst the current crisis, Zambia is the only country which has not put in place export restrictions after producing a record crop 3.6 million metric tonnes 2021/22 season. In fact, it is estimated that Zambia could export about 700,000mt of corn in 2022/23 due to carry-over stocks from the previous season.³⁵ Current (i.e., June) prices in Angonia and Maputo, Mozambique are higher than they were in May, but lower in Massinga. The current maize prices are, however, lower than they were 3-12 months ago in most selected markets.

Table 7: Changes in maize prices in selected Southern African Countries³⁶

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	250.00	0.00 ●	25.00 ⊗	64.47 ⊗	108.33 ⊗		
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	245.00	38.68 ⊗	62.25 ⊗	122.73 ⊗	113.97 ⊗		
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	240.00	30.91 ⊗	50.00 ⊗	80.45 ⊗	60.00 ⊗		
Malawi	Maize (white)	National Average, Retail, MWK/KG	255.00	25.00 ⊗	37.84 ⊗	67.76 ⊗	91.37 ⊗		
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	263.00	19.55 ⊗	28.92 ⊗	54.71 ⊗	70.04 ⊗		
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	13.34	20.73 ⊗	-50.32 ↓	-34.08 ↓	3.02 ▲		
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	26.13	10.64 ↑	13.13 ↑	-30.97 ↓	-3.71 ↘		
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	26.46	-17.07 ↓	-13.17 ↓	-18.29 ↓	-4.20 ↘		
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	3.57	-10.70 ↓	-7.23 ↓	20.42 ⊗	21.76 ⊗		

Note: Last price is for June 2022, *July, **May, ***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%)

Seasonal Monitor and Crop Yield Forecasts

The harvesting season has been completed across most countries in the region and countries are already preparing for the 2022/23 farming season, which typically starts in September. In **Zambia**, the long rainy season ended last month, when the harvesting of maize and rice in most regions was completed. In **Malawi**, the harvesting season of the main cereal crops is complete, and the minor winter wheat crop is expected to be harvested by September. This season, Malawi experienced a below-average harvest, compounded by worsening macro-economic conditions that severely limit post-harvest improvements. According to the FAO³⁷ National cereal production in 2022 is forecast at 4 million tonnes, about 4 percent above the five-year average, although nearly 0.9 million tonnes down from the bumper output of 2021. This below-average harvest is attributable to poor rainfall performance, the passage of multiple tropical storms, and limited supply access to agricultural inputs. As the country prepares for the 2022/23 agricultural season, the government has announced that it will reduce the number of beneficiaries under the Affordable Inputs Programme (AIP) by about 50 percent³⁸, and this will have serious implications on food production and availability next season.

³⁵ Report by USDA & GAIN. Zambia Corn Availability Appears Sufficient Despite Lower Production

³⁶ Author's construction based on data from WFP (2022) and FAO (2022).

³⁷ <https://reliefweb.int/report/malawi/qiews-country-brief-malawi-20-july-2022>

³⁸ <https://times.mw/government-halves-affordable-inputs-programme-families/?amp=1>

Commodity prices

Key drivers of the price movements in West Africa include⁴²:



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, the depreciation of local currency, as well as bans on the export of grains, have contributed towards higher prices in the region.

Overall, commodity prices have begun to decrease in West Africa, although prices remain well above their levels 6-12 months ago. In most selected markets of West Africa, maize prices have either declined or remained stable over the past one month. Few markets have experienced low-to-moderate increases in prices, particularly the Malian markets, which show price increases in excess of 5% but less than 10%. In Togo, maize prices show declining trends in all selected markets compared to 3-12 months ago, and where there are higher prices, this did not exceed 11% except in Amegnran, where the current price of maize is about 18% higher than a year ago. It is not clear the driving factor behind these price drops in the midst of the peak of the lean season and conflicts in the region. However, food assistance⁴³ and government efforts in the form of subsidies may have had influence on prices. Prospects for the next 3-6 months, where data is available, show decline in prices. This is because of seasonal forecasts showing good prospects for the current season, which is underway due to favourable rains.

Table 9: Changes in maize prices in selected West African countries⁴⁴

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Cote d'Ivoire	Maize (white)	Korhogo, Retail, XOF/KG*	300.00	2.72 ▲	7.78 ▲	35.21 ☒	28.30 ☒	-5.41 ▼	-10.75 ▼
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	350.00	0.00 ●	16.67 ☒	33.97 ☒	16.67 ☒	-17.67 ▼	-19.97 ▼
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG	488.89	0.00 ●	25.71 ☒	52.78 ☒	52.78 ☒		
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	0.00 ●	20.00 ☒	26.13 ☒	32.54 ☒		
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	324.62	-1.03 ▼	12.24 ▲	50.99 ☒	40.53 ☒		
Mali	Maize (white)	Ansongo, Retail, XOF/KG	350.00	7.69 ▲	7.69 ▲	27.27 ☒	56.95 ☒	-14.67 ▼	-5.46 ▼
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	350.00	9.38 ▲	22.81 ☒	21.53 ☒	52.17 ☒		
Mali	Maize (white)	Faladié, Retail, XOF/KG	350.00	1.45 ▲	37.25 ☒	40.00 ☒	70.73 ☒	-26.05 ▼	-17.60 ▼
Mali	Maize (white)	Gao, Retail, XOF/KG	350.00	0.00 ●	0.00 ●	16.67 ☒	55.56 ☒		
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	400.00	0.00 ●	25.00 ☒	56.25 ☒	60.00 ☒	-18.24 ▼	-8.70 ▼
Mali	Maize (white)	Niarela, Retail, XOF/KG	356.00	6.27 ▲	20.68 ☒	42.40 ☒	78.00 ☒	-24.27 ▼	-16.80 ▼
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	252.50	0.80 ▲	-5.96 ▼	36.50 ☒	13.23 ▲		
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	226.00	-2.24 ▼	-5.55 ▼	32.13 ☒	18.95 ☒		
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	226.20	-4.92 ▼	-9.36 ▼	10.13 ▲	20.13 ☒		
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG**	261.00	-0.10 ▼	3.16 ▲	50.22 ☒	19.31 ☒		
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	200.50	1.26 ▲	-10.89 ▼	-28.39 ▼	2.82 ▲		
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	295.00	-3.28 ▼	-1.67 ▼	-0.67 ▼	18.00 ☒		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	255.00	-3.77 ▼	-1.16 ▼	2.00 ▲	-2.67 ▼		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	260.00	-1.89 ▼	1.96 ▲	6.12 ▲	4.00 ▲		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	270.00	0.00 ●	0.00 ●	6.72 ▲	0.00 ●		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	300.00	-3.23 ▼	-14.29 ▼	-1.64 ▼	7.14 ▲		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	265.00	-1.85 ▼	3.92 ▲	10.42 ▲	10.42 ▲		

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

⁴² FEWSNET, 2022. Accessed at <https://fews.net/west-africa> on 7th August 2022.

⁴³ <https://fews.net/west-africa>

⁴⁴ 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 as maize. Changes in prices between, mostly, May and June show decreases, or stable-moderate increments in most selected markets. Current prices, however, are well above their levels compared to 3-12 months ago. In Mali, particularly, selected markets have experienced price surges of between 50% and 120% higher than a year ago. Most West African countries are at the peak of their lean season, and several other factors have sustained higher prices in the region. Some of these factors include conflicts and insecurity, which have disrupted farming and trading activities, restrictions on grain outflows, strong export demands, the lingering effects of COVID-19 on shipping, currency depreciation, and soaring global commodity and fuel prices, making transports costs more expensive.

Table 10: Changes in millet prices in selected West African countries⁴⁵

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	354.00	-2.75 ▾	19.19 ⊗	12.03 ↑	12.38 ↑		
Burkina Faso	Millet	Bousse, Retail, XOF/KG	346.00	1.47 ▲	14.95 ↑	30.08 ⊗	44.77 ⊗		
Burkina Faso	Millet	Dori, Retail, XOF/KG	424.00	2.17 ▲	7.07 ↑	27.33 ⊗	52.52 ⊗		
Burkina Faso	Millet	Faramana, Retail, XOF/KG	291.00	-5.21 ▾	13.23 ↑	46.23 ⊗	86.54 ⊗		
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	408.00	2.26 ▲	31.19 ⊗	40.69 ⊗	81.33 ⊗		
Burkina Faso	Millet	Ouagadougou (Sankaryare), Retail, XOF/KG	405.00	-1.46 ▾	-1.22 ▾	10.35 ↑	63.97 ⊗		
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	314.00	2.95 ▲	1.95 ▲	20.31 ⊗	33.05 ⊗		
Burkina Faso	Millet	Titao, Retail, XOF/KG	417.00	3.99 ▲	25.23 ⊗	61.63 ⊗	126.63 ⊗		
Mali	Millet	Ansongo, Retail, XOF/KG	375.00	1.35 ▲	7.14 ↑	19.05 ⊗	63.04 ⊗		
Mali	Millet	Badalabougou, Retail, XOF/KG	450.00	4.65 ▲	30.43 ⊗	50.00 ⊗	119.51 ⊗		
Mali	Millet	Faladié, Retail, XOF/KG	400.00	0.00 ●	26.98 ⊗	36.05 ⊗	100.00 ⊗		
Mali	Millet	Gao, Retail, XOF/KG	413.00	-2.82 ▾	18.00 ⊗	24.77 ⊗	55.85 ⊗		
Mali	Millet	Kayes Centre, Retail, XOF/KG	500.00	25.00 ⊗	42.86 ⊗	65.02 ⊗	81.82 ⊗		
Mali	Millet	Niarela, Retail, XOF/KG	400.00	0.00 ●	19.40 ⊗	48.70 ⊗	100.00 ⊗		
Niger	Millet	Abalak, Retail, XOF/KG	417.00	5.97 ↑	12.40 ↑	26.75 ⊗	24.11 ⊗	-2.47 ▾	5.85 ↑
Niger	Millet	Bonkaney, Retail, XOF/KG	330.00	0.00 ●	5.10 ↑	16.61 ⊗	12.24 ↑		
Niger	Millet	Goure, Retail, XOF/KG	354.00	4.73 ▲	1.72 ▲	19.59 ⊗	10.97 ↑		
Niger	Millet	Katako, Retail, XOF/KG	337.00	0.00 ●	4.98 ▲	17.01 ⊗	14.63 ↑	2.53 ▲	9.23 ↑
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	276.00	-1.43 ▾	10.40 ↑	33.53 ⊗	16.95 ⊗		
Nigeria	Millet	Kano, Wholesale, Naira/KG**	244.75	-1.91 ▾	0.58 ▲	10.75 ↑	24.08 ⊗		
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	220.30	-7.36 ▾	-9.08 ▾	-12.23 ▾	8.55 ↑		
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	279.50	1.64 ▲	5.37 ↑	36.34 ⊗	12.14 ↑		
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	230.00	-3.16 ▾	-2.65 ▾	-17.86 ▼	15.00 ↑		

Note: Last price is for June 2022, *July, **May, ***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%)

Again, sorghum prices depict similar trends as maize and millet in the region. Current prices over previous months' show a decline or stability or moderate increases. The greatest increase seen is about 10% in Badalabougou, Mali. Current prices in Niger, Nigeria, and Togo also show decreasing trends compared to three months ago. Overall, the current recorded prices are above what they were 6-12 months ago.

⁴⁵ Author's construction based on data from WFP (2022) and FAO (2022)

Table 11: Changes in sorghum prices in selected West African countries⁴⁶

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	7.14 ↑	50.00 ×	50.00 ×	87.50 ×	-32.62 ↓	-30.49 ↓
Mali	Sorghum	Badalabougou, Retail, XOF/KG	419.00	10.26 ↑	33.02 ×	59.32 ×	109.50 ×		
Mali	Sorghum	Faladié, Retail, XOF/KG	400.00	2.56 ▲	33.33 ×	60.00 ×	100.00 ×		
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	0.00 ●	14.29 ↑	33.33 ×	60.00 ×		
Mali	Sorghum	Niarela, Retail, XOF/KG	375.00	0.00 ●	17.19 ×	50.00 ×	87.50 ×		
Niger	Sorghum	Abalak, Retail, XOF/KG	339.00	-1.88 ▾	-1.45 ▾	6.60 ↑	5.61 ↑		
Niger	Sorghum	Bonkaney, Retail, XOF/KG	312.00	0.00 ●	6.85 ↑	6.12 ↑	21.40 ×	-6.69 ↓	-1.20 ▾
Niger	Sorghum	Goure, Retail, XOF/KG	306.00	6.25 ↑	-8.11 ▾	11.27 ↑	21.43 ×		
Niger	Sorghum	Katako, Retail, XOF/KG	320.00	0.00 ●	7.38 ↑	12.28 ↑	24.03 ×	-2.58 ▾	5.54 ↑
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	284.00	0.18 ▲	0.00 ●	60.86 ×	27.35 ×		
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	232.00	4.34 ▲	0.75 ▲	-7.33 ▾	25.34 ×		
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	234.05	-5.01 ▾	-10.14 ▾	-16.11 ▾	17.32 ×		
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	272.50	2.06 ▲	3.22 ▲	43.42 ×	20.98 ×		
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	205.00	-6.82 ▾	0.00 ●		17.14 ×		
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	280.00	-3.45 ▾	-5.08 ▾	-5.72 ▾	-6.67 ▾		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	270.00	-12.90 ▾	8.00 ↑	22.73 ×	8.00 ↑		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	309.00	-1.90 ▾	12.36 ↑	11.96 ↑	-0.32 ▾		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	290.00	-3.33 ▾	16.00 ×	18.37 ×	16.00 ×		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	320.00	-1.54 ▾	0.00 ●	1.59 ▲	1.59 ▲		

Note: Last price is for June 2022, *July, **May, ***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%)

Seasonal Monitor and Crop Yield Forecasts

According to the latest seasonal monitor published by FEWSNET, the West African agricultural season is progressing well with mostly average to above average and well-distributed rainfall. Rainfall has resumed in the Sahelian areas, which had experienced moderate to severe rainfall deficits resulting in delayed planting early in the season. These areas include southern Niger and eastern Mali or other areas, particularly in northern Senegal, southwestern Mauritania, and southern Mali. The resumption of rainfall will allow for replanted crops to close their cycle by the end of the season, and no negative impact of early season deficits are anticipated on crop performance. Maize harvests in the bimodal zone were completed in mid-July with average to above average production expected⁴⁷. In **Burkina Faso**, the onset of the rainy season in July saw the country receiving regular rains, which have allowed the intensification of sowing operations, especially in accessible areas. However, insecurity and difficulties of access to fertilizers are the major factors that limit sowing. In **Niger**, the 2022/23 cropping season is gradually taking hold across the country and planting is already done in 51 percent of the country's farming villages as of June 20, 2022, compared to 26 percent in the same period in 2021. In **Nigeria**, season farming activities are underway across the country, with households engaged in planting, weeding, fertilizer applications, and the early green harvest of maize and yams, depending on the area. The rainy season is established across the country, with favourable crop conditions, except in the localized areas affected by flooding in the areas of Adamawa, Yobe, Lagos, and states in Abuja, and below-average rainfall in south-eastern Nigeria.

⁴⁶ Author's construction based on data from WFP (2022) and FAO (2022)

⁴⁷ West Africa Seasonal Monitor (FEWSNET, July 2022)



African Continental Trade Updates

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.

- The Board of Directors of African Export-Import Bank (Afreximbank) has renewed their approval of a US\$1 billion facility to operationalise the African Continental Free Trade Agreement (AfCFTA) Adjustment Funds. It also approved a Grant Funding amounting to US\$10 million to seed the Base Fund of the AfCFTA Adjustment Funds⁴⁸.
- The Board of Directors of the African Development Bank Group has approved a \$175 million Trade Finance Funded Risk Participation Agreement facility between the African Development Bank, and the Trade and Development Bank (TDB). The agreement is expected to boost intra-Africa trade, promote regional integration, and contribute to a reduction in the trade finance gap in Africa. Under this agreement, AfDB will provide liquidity of up to 50% (the other 50% to be matched by TDB), to Issuing Banks on a risk share basis, to support trade activities of local corporates and SMEs in COMESA member countries⁴⁹.
- The African Continental Free Trade Area secretariat commenced a pilot trading with seven countries namely Rwanda, Cameroon, Egypt, Ghana, Kenya, Mauritius and Tanzania under the AfCFTA) framework. According to the AfCFTA secretariat, the pilot seeks to test the environmental, legal and trade policy basis for intra-African trade⁵⁰.
- The AfCFTA Secretariat launched the Rules of Origin Manual and e-Tariff Book to facilitate traders needed knowledge for cross-border trade across the African continent⁵¹. While WTO also issued 2022 edition of “World Tariff Profiles”, which provides comprehensive information on the tariffs and non-tariffs measures imposed by over 170 countries and customs territories.⁵²
- US-based International Finance Corporation (IFC) has provided \$9.4 billion in financing to 36 African countries between July 1, 2021, and July 30, 2022, to develop regional pharmaceutical manufacturing, boost intra-Africa trade and strengthen food security. The investments include \$3 billion in trade financing, \$2.1 billion for green transition and \$861.7 million to increase digital connectivity. In addition, the fund provided \$603 million in agriculture financing to strengthen food security. Financing across Africa included short-term finance (\$3 billion) and mobilisation (\$2.6 billion), with 49 percent of the funds going to low-income and fragile and conflict-affected states⁵³.

⁴⁸ <https://www.afreximbank.com/afreximbank-board-of-directors-renews-us1-billion-facility-and-approves-a-us10-million-grant-to-operationalise-the-afcfta-adjustment-funds/>

⁴⁹ <https://www.afdb.org/en/news-and-events/press-releases/african-development-bank-approves-175-million-regional-trade-finance-funded-risk-participation-agreement-facility-eastern-and-southern-african-trade-development-bank-53276>

⁵⁰ <https://guardian.ng/business-services/afcfta-secretariat-commences-pilot-trading-with-seven-countries/>

⁵¹ <https://etariff.qu-afcfta.org/rulesoforigin> ; <https://etariff.qu-afcfta.org/mapsearch>

⁵² https://www.wto.org/english/news_e/news22_e/publ_29jul22_e.htm

⁵³ <https://www.zawya.com/en/economy/africa/ifc-invests-94bln-in-africas-private-sector-development-mc9dl15x>

East Africa Food Trade Updates

The following are some of the major events and activities that occurred during the month, which have implications on regional food trade within and with the East African region:

- Kenya and Uganda have filed complaints to the East African Business Council (EABC) over the law, which raised import taxes on goods from non-EAC countries to 35 percent indicating that the move, which was adopted in May this year, is affecting some basic commodities outside the band⁵⁴.
- The Afreximbank and the EABC launched the EABC – Africa Trade and Investment Council, with the goal of creating a platform for engagement and investment between the East Africa Community (EAC) and the rest of Africa, to unlock investment opportunities, private sector development and business growth. Through this arrangement, the Afreximbank will provide a range of its financing instruments and trade facilitation initiatives to facilitate intra-African trade and investment under the African Continental Free Trade Agreement⁵⁵.

The Food Security and Nutrition Working Group published its latest East African cross-border trade bulletin for July 2022. Key points from the bulletin regarding food trade in the region include the following:

- Maize grain remained the most traded commodity in the region in the first quarter of 2022 (January to March). Wheat and maize flour surpassed dry beans as the second and third most traded commodities in the region while, rice, sugar, and sorghum remained significantly traded.
- Regional trade in maize, sorghum, rice, and dry beans was above average, driven by above-average prices in deficit countries including Kenya, Rwanda, Burundi, Somalia, South Sudan, Eritrea, and Djibouti. This attracted supply from the main surplus countries of Tanzania, Uganda, and Ethiopia.
- The prices of staple food commodities followed seasonal patterns but were elevated, given below-average harvests, high inflation as a result of COVID-related pent-up demand driving up prices, as well as high oil, wheat, and flour prices due to the Ukraine-Russia conflict.

Figure 7 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

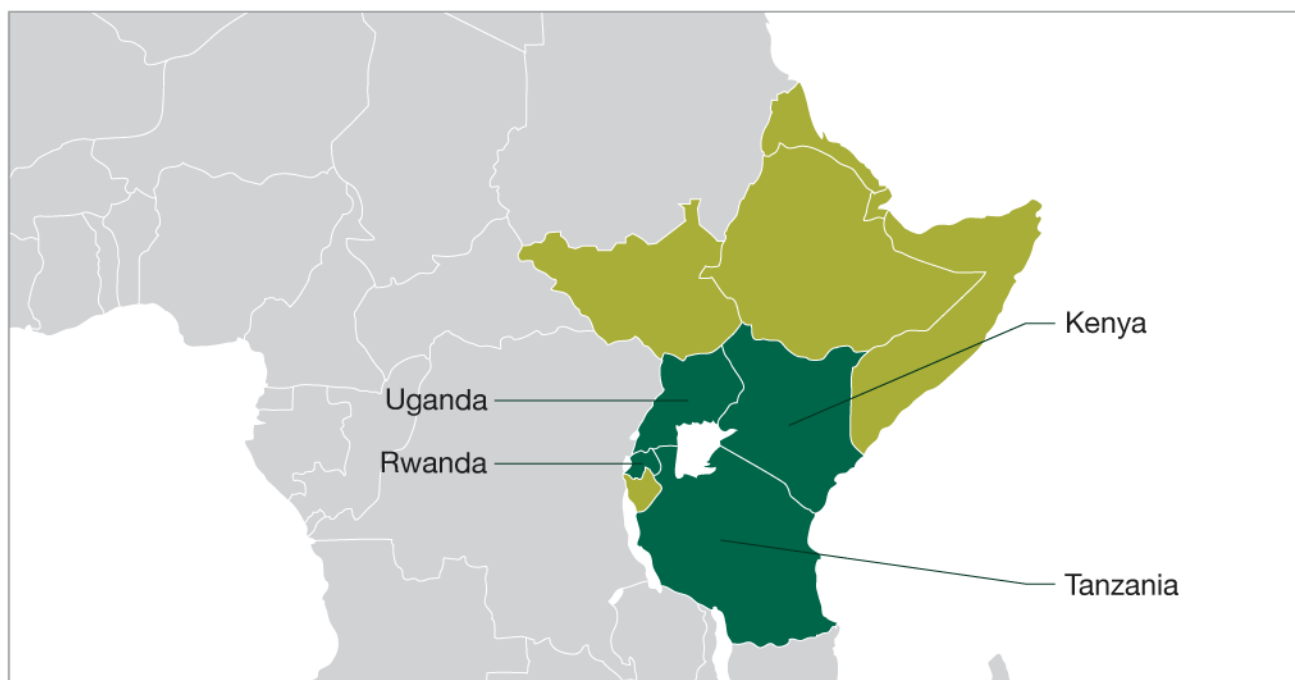


Figure 7: East Africa Cross border trade updates June 2022

⁵⁴ <https://www.theeastafrican.co.ke/tea/business/kenya-and-uganda-cry-foul-as-reality-of-new-taxes-checks-in-3873944>

⁵⁵ <https://www.afreximbank.com/afreximbank-and-east-african-business-council-launch-the-eabc-africa-trade-and-investment-council/>

KENYA

- Kenya has opened talks with Zambia, Tanzania and Uganda as it seeks to limit them from exporting maize to other countries at its expense in fresh efforts to curb the surge in maize flour prices, ease inflation and the squeeze on household budgets.
- The Ministry of Agriculture announced that it will allow shipments of processors, whose consignment of yellow maize imports will arrive in the country past the initial set deadline of October as the country seeks to tame high costs of animal feed.
- The government has launched the Standard Operating Procedures (SOP) for points of entry and exit which are geared towards protecting the country's borders and promoting legitimate trade

UGANDA

- Kenya and Uganda are looking at another round of trade wars after Nairobi reintroduced a levy on eggs imported from Uganda. 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.

TANZANIA

- Tanzania has imposed a total ban on the importation of day-old chicks effective next week as it seeks to protect its local hatcheries and limit the inflow of substandard chicks. The ban, which takes effect on July 30, aims to protect the local poultry market.
- The African Development Bank (AfDB) signed a \$60 million financial package comprising \$50 million subordinated debt to support the CRDB's regional expansion efforts, and a senior loan of \$10 million to support CRDB's efforts in accelerating the access to finance for women SMEs in Tanzania.

RWANDA

- Rwanda's Small and Medium Sized Enterprises (SMEs) engaged in horticulture and agro-processing are set to access the Egyptian market following a successful trade mission facilitated by the COMESA Regional Enterprise Competitiveness and Access to Markets Programme (RECAMP).
- Rwanda plans to put more efforts in its trade with the Economic Community of the Central African States (ECCAS), a bloc where the country is exporting far more than it imports and has more economic opportunities. Key commodities targeted for this opportunity include milk and potatoes, which are liked in the targeted region.

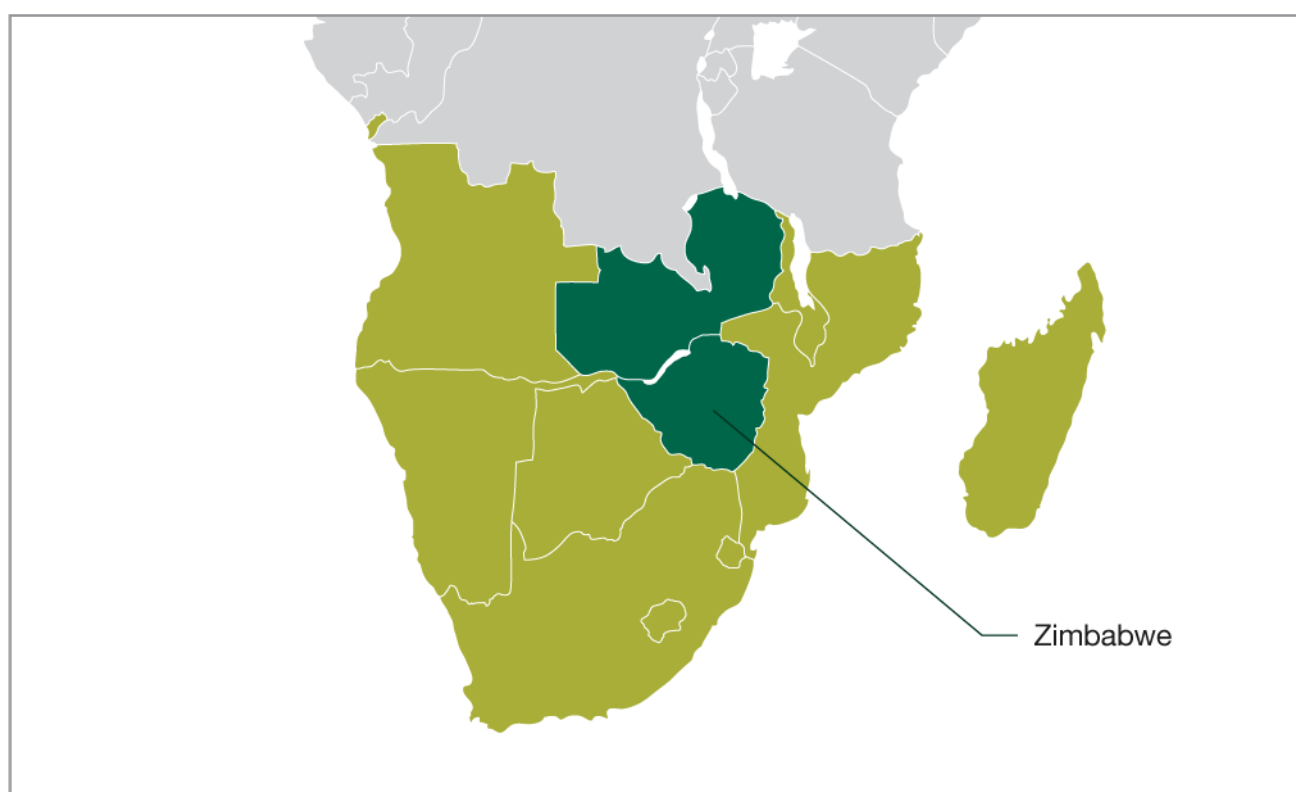
Southern Africa Food Trade Updates

The following are some of the major events and activities that occurred during the month, with implications on regional food trade within and with the Southern African region:

- The Southern African Development Community (SADC) is developing and implementing customs instruments to tackle the challenges that contribute to higher transaction costs in order to ease trade among countries in the region. The customs instruments include logistics, simplification and harmonisation of documentation associated with cross-border trade, improving transparency in operations of regulatory agencies, harmonisation of standards and technical regulations, harmonisation of Sanitary and Phytosanitary measures (SPS), monitoring and resolution of non-tariff barriers (NTBs), as well as improving the business environment in which transactions take place.

Figure 8 summarises some of the key activities and events recorded across Southern Africa that impact food trade activities.

Figure 8: Southern Africa Food Trade updates for July 2022



ZIMBABWE

- Cross border traders have urged regional governments to decentralise trade document issuance and clearance by creating one-stop-centre models for harmonised services, and the enhancement of the ease of doing business.
- This emerged during a stakeholder training meeting organised jointly by the Common Market for Eastern and Southern Africa (COMESA) and the International Organisation for Migration (IOM) in Bulawayo.

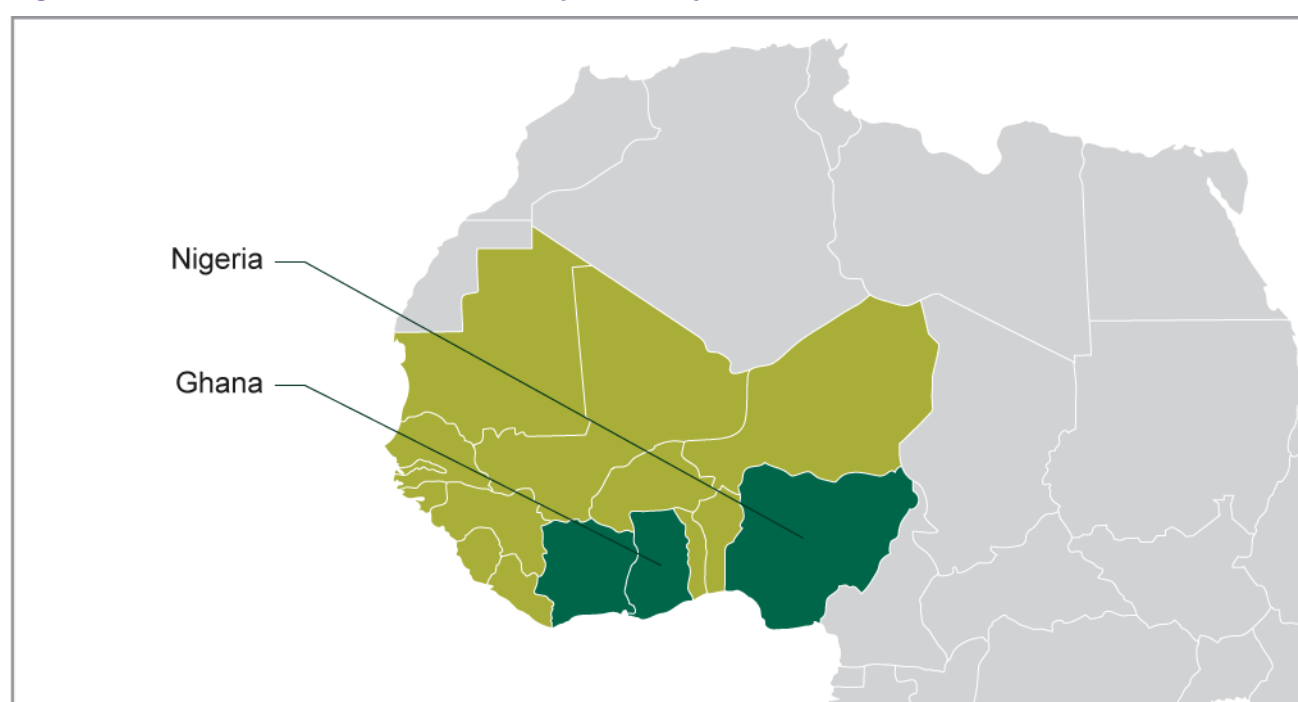
West Africa Food Trade Updates

The following are some of the major events and activities that occurred during the month, with implications on regional food trade within and with the West African region:

- The Economic Community of West African States (ECOWAS) has lifted the economic and financial sanctions placed on Mali.
- Traders in the West African corridor have highlighted various challenges affecting trade among the Economic Community of West African States (ECOWAS) members. The traders under the aegis of West African Association for Cross-border Trade in Agro-forestry-pastoral and Fisheries Products (WACTAF), said poor infrastructure, such as poor electricity supply, bad roads, cost of fuelling, kidnapping and banditry are seriously affecting trade on the Nigerian corridor.

Figure 9 provides an update of issues and events reported in selected West African countries, which have implications on food trade and food security in the West African region.

Figure 9: West Africa Cross Border Trade Updates July 2022



NIGERIA

- The AfDB is establishing a world-class agro testing centre in Sagamu, Ogun State, which upon completion will help to stimulate the standardisation of farm produce export from Africa.
- The Nigerian Shippers' Council (NSC) has launched its operational manual for inland dry ports to promote efficient transportation, enhance efficiency at the ports and engender trade facilitation

GHANA

- The Reserve Bank Governors has urged banks and non-bank financial institutions to increase investments in digitization platforms as well as cyber-security systems to facilitate safe and secure trade transactions through AfCFTA
- The World Bank reports that intra-Africa exports by Ghana could increase by 132 per cent by 2035 on the back of increased foreign direct investment (FDI) to the country, and the continent at large.
- Ghana and Burkina Faso, through their respective Chambers of Commerce and Industry, seek to promote trade and commerce through exhibition of products in Accra. The five-day event, scheduled for September 27 to October 2, 2022, will focus on creating a platform and opportunities for Small and Medium Enterprises (SMEs) and Small and Medium Industries (SMIs) of both countries.



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