FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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

The Food Security Monitor is produced with support from the UK Government's Foreign, Commonwealth & Development Office (FCDO) through the Africa Food Trade & Resilience Programme. The opinions expressed in this report are those of the authors and do not reflect the official policy or position of 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 August Food Security Monitor are summarised below:

Global Food Security update

The first grain shipment from Ukraine left the southern port of the country on the 1st of August following a 22 July agreement between Russia, Türkey, Ukraine, and the United Nations. Three additional ships left on the 5th of August in a move that was widely welcomed as one that will bring much-needed relief and stability to global food security.

Food Security Outlook

In East Africa, food insecurity is expected to persist in many areas due to multiple shocks and hazards: season performance, economic under-performance, malfunctioning markets, rising food prices, knock-on effects of conflicts/insecurity, displacement/migration, and destitution following the loss of livelihood assets.

In Southern Africa, the lean season is set to start earlier than usual across most deficit-producing areas due to the droughts and cyclones that impacted the season.

In West Africa, staple food prices remain above their five-year average despite some slight monthly declines and stability.

Food Trade

The AfCFTA launched the *AfCFTA Hub digital platform*, a nexus linking national governments, intergovernmental, private, and public digital and partnership platforms together, making it easier for SMEs and start-ups, to engage with all actors across the AfCFTA.

In East Africa, the East African Business Council (EABC) launched the EAC Small and Medium Enterprises (SMEs) online platform to ease access to cheap and affordable finances from available capital in the region.

In Southern Africa, Afreximbank and the SADC Business Council launched the SADC – Africa Trade and Investment Marketplace, which aims to promote regional trade, unlock investment opportunities, deepen economic cooperation, and drive sustainable business growth between the SADC region and the rest of Africa.

Commodity Prices

Commodities prices remain well above their 6–12-month levels across the three sub-regions. Also, observed prices of all three selected commodities (maize, beans, and sorghum) in the East Africa sub-region are generally higher than the past 1-12 months. In Southern Africa, prices are still higher in Malawi while prices have mostly dropped in Mozambique and Zambia due to carryover stocks from previous season. In the West African sub-region, however, prices generally show lower trends although they are still well above their levels a year ago."

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 provides a quick overview of the changes in the number of people that are food insecure and changes in average food prices over the past 6 and 12 months.

Table 1: Changes in Food Security Situation and Commodities[1] Price Changes[2]

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	↓ -4.42	↑	↑
Cote d'Ivoire	↓ -3.70	↑ 15.56	↑	↑
Ethiopia	↑ 22.29	↓ -22.89	↑	↑
Ghana	↑ 18.52	↑ 16.36	↑	↑
Kenya	↑ 79.41	↑ 56.41	↑	↑
Malawi	↑ 65.22	↑ 65.22	↑	↑
Mali	↓ -5.04	↑ 5.61	↑	↑
Mozambique	↑ 11.94	↓ -30.56	↓	↓
Niger	↑ 29.77	↑ 37.10	↑	↑
Nigeria	↓ -2.13	↓ -11.13	↑	↑
Rwanda	↑ 8.00	↑ 8.00	↑	↑
South Sudan	↓ -1.52	↓ -1.52	↑	↑
Tanzania	↑ 25.58	↑ 5.88	↑	↑
Togo	○ 0.00	↓ -4.55	↓	↑
Uganda	↑ 7.09	↑ 1.34	↑	↑
Zambia	↑ 4.17	↑ 13.64	↑	↑
Zimbabwe	↑ 3.92	↓ -8.62		

Key: ○ *No Change* ↑ = *increase* ↓ = *decrease*

As shown in table 1 below, Burkina Faso, Cote d'Ivoire, Mali, Nigeria, and South Sudan have had declines in the number of people with insufficient food consumption[3] compared to six months ago, while the situation

[1] Maize is the main commodity *except Burkina Faso and Niger where millet is being tracked*

[2] 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

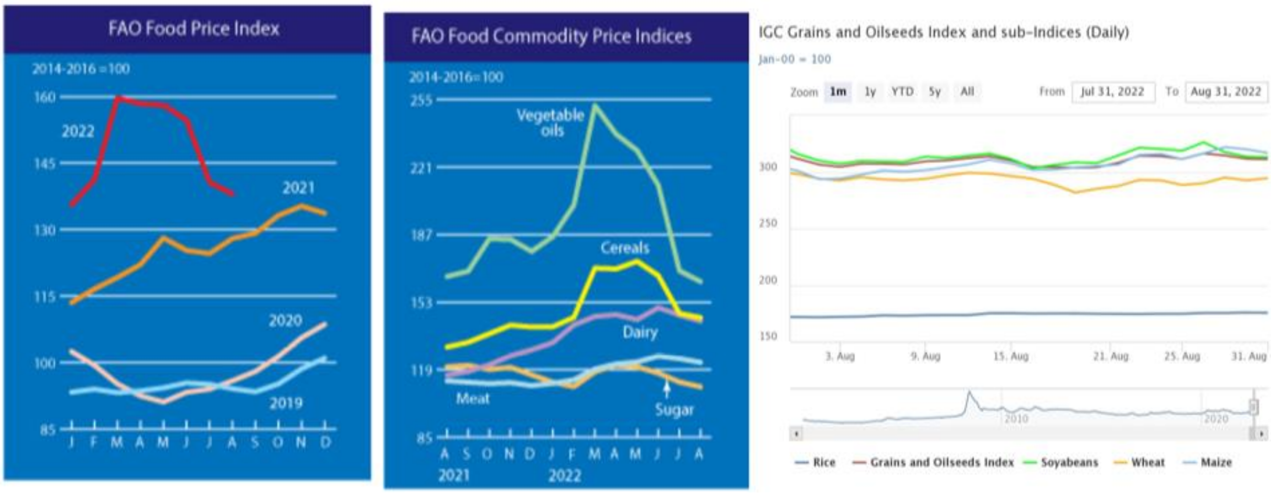
[3] **People with insufficient food consumption refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS)**. The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets, and how frequently food is 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**

remains the same in Togo. Similarly, compared to a year ago, Burkina Faso, Ethiopia, Mozambique, Nigeria, South Sudan, Togo, and Zimbabwe have had a drop in the number of people with insufficient food for consumption. In terms of commodity price changes, most countries' prices are higher than they were 6 and 12 months ago, except in Mozambique when compared to both periods, and Togo when compared to six months ago.

Global Food Security Update

Global Food Prices

Over the past one-month (July-August), global food prices largely show declines. Overall, the Food and Agriculture Organization (FAO) food price index declined by 1.9%, although this is still above last year's by 7.9%. This trend is driven by declines in all five sub-indices (cereals, vegetable oils, dairy, meat, and sugar) of which cereals fell by 1.4% and vegetable oils by 3.3%. The IGC Grains and Oilseeds Index remained largely static between 31st July and 31st August. Also, the World Bank's commodity price data shows that international maize price declined from US$323/MT to US$289.8/MT over the same period, while wheat prices remained largely the same. These trends are influenced by improvements in supplies especially from Canada, the United States of America and the Russian Federation, and higher seasonal availability as harvests continued in the northern hemisphere as exports were released from the Ukraine's Black Sea port.[4]



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

			Annual Averages			Quarterly Averages					Monthly Averages		
			Jan-Dec	Jan-Dec	Jan-Dec	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jun	Jul	Aug
Commodity	Unit		2019	2020	2021	2021	2021	2021	2022	2022	2022	2022	2022
Maize	$/mt	b/	170.1	165.5	259.5	288.7	256.9	251.0	301.6	342.9	335.7	323.0	289.8
Rice, Thailand 5%	$/mt	b/	418.0	496.8	458.3	484.7	405.7	400.3	425.3	446.3	444.0	418.0	431.0
Rice, Thailand 25%	$/mt		410.4	481.8	448.3	474.0	396.7	394.0	420.0	442.7	441.0	412.0	421.0
Rice, Thailand A1	$/mt		393.5	474.6	436.1	459.6	386.4	380.7	405.4	426.5	427.6	405.7	412.6
Rice, Vietnam 5%	$/mt		351.9	428.0	446.3	480.0	402.6	406.2	390.6	406.9	411.9	411.1	395.8
Sorghum	$/mt		161.5	171.6	...	...	...	...	...	...	...	...	...
Wheat, U.S., HRW **	$/mt	b/	201.7	231.6	315.2	287.9	318.8	370.3	417.0	492.4	459.6	382.5	382.9
Wheat, U.S., SRW **	$/mt		211.3	227.7	281.7	271.9	264.8	331.2	370.4	415.2	379.9	316.7	...

Figure 1: Global Commodity Prices, July/August 2022[5]

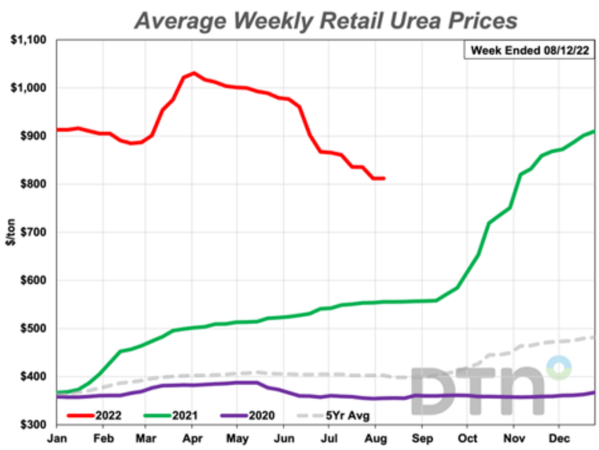
consumption: Typically refers to households that are consuming staples and vegetables every day, frequently accompanied by oil and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

[4] https://www.fao.org/worldfoodsituation/foodpricesindex/en/

[5] AMIS. Accessed at http://www.amis-outlook.org/indicators/prices/en/ on 4th September 2022

Global Fertiliser Prices

International fertilizer prices continue to fall with all types of fertilizer showing declines between July and August. For instance, dry urea price dropped by 6% from $861/ton in July to $812/ton in August, while potash prices fell from $885/ton to $881/ton during the same period. The World Bank fertilizer price data also confirms these downward trends as shown in the table below. The general hike in fertilizer prices as well as seasonal demands have lowered the global demand for fertilizer, with many countries in Africa cutting their subsidy programmes by half. All of these contributed to declining fertilizer prices over the period.



Source: DTN

Date Range	DAP	MAP	POTASH	UREA
Aug 9-13 2021	695	755	563	555
Sep 6-10 2021	699	757	575	558
Oct 4-8 2021	736	829	675	653
Nov 1-5 2021	814	900	750	820
Nov 29-Dec 3 2021	836	918	777	873
Dec 27-31 2021	864	931	809	911
Jan 24-28 2022	877	936	814	910
Feb 21-25 2022	874	934	815	885
Mar 21-25 2022	1014	1018	850	976
Apr 18-22 2022	1050	1079	879	1012
May 16-20 2022	1059	1083	878	993
Jun 13-17 2022	1046	1074	879	961
Jul 11-15 2022	100	1052	885	861
Aug 8-12 2022	982	1032	881	812

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

			Annual Averages			Quarterly Averages					Monthly Averages		
Commodity	Unit		Jan-Dec 2019	Jan-Dec 2020	Jan-Dec 2021	Apr-Jun 2021	Jul-Sep 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-Jun 2022	Jun 2022	Jul 2022	Aug 2022
DAP	$/mt		306.4	312.4	601.0	574.3	620.0	714.9	794.9	860.1	783.8	784.0	749.4
Phosphate rock	$/mt	b/	88.0	76.1	123.2	107.5	136.5	159.1	174.8	264.0	287.5	320.0	320.0
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	746.5	736.0	703.8
Urea, E. Europe **	$/mt	b/	245.3	229.1	483.2	351.0	435.7	828.5	821.0	774.2	690.0	601.0	591.3

Figure 2: Global Fertilizer Prices, July/August 2022

Fertilizer Prices in Selected African Countries

AGRA's own price data collection, shown in table 1 below, shows that fertilizer prices in Rwanda, Uganda, and Burkina Faso (for urea only) have remained unchanged while prices have declined in Tanzania, Zambia, Cote d'Ivoire, and Ghana. On the other hand, average fertilizer prices have increased in Kenya, Mozambique, Burkina Faso (for NPK), and in Nigeria. These trends are largely influenced by government interventions in the form of subsidies and support by development partners to make this input affordable for farmers. Also, seasonality dynamics and high global prices are reducing demand and lowering prices.

Table 1: Changes in fertilizer prices in selected African Countries[6]

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	0.00		
Rwanda	NPK 17:17:17	National, RWF/KG	882.00	0.00	0.00		
Rwanda	Urea	National, RWF/KG	768.00	0.00	0.00		
Tanzania	Nitrate fertilizer	National, TZS/KG**	690.00	-1.43			
Tanzania	Phosphate fertilizer	National, TZS/KG**	783.80	-21.62			
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	3,200.00	4.07	8.47		
Mozambique	Urea	National, MZN/50kg	3,800.00	4.11	8.57		
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	675.00	17.39	12.50		
Burkina Faso	NPK 15 15 15	National, USD per ton	675.00	17.39	12.50		
Burkina Faso	Urea	National, USD per ton	4,500.00	0.00	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	

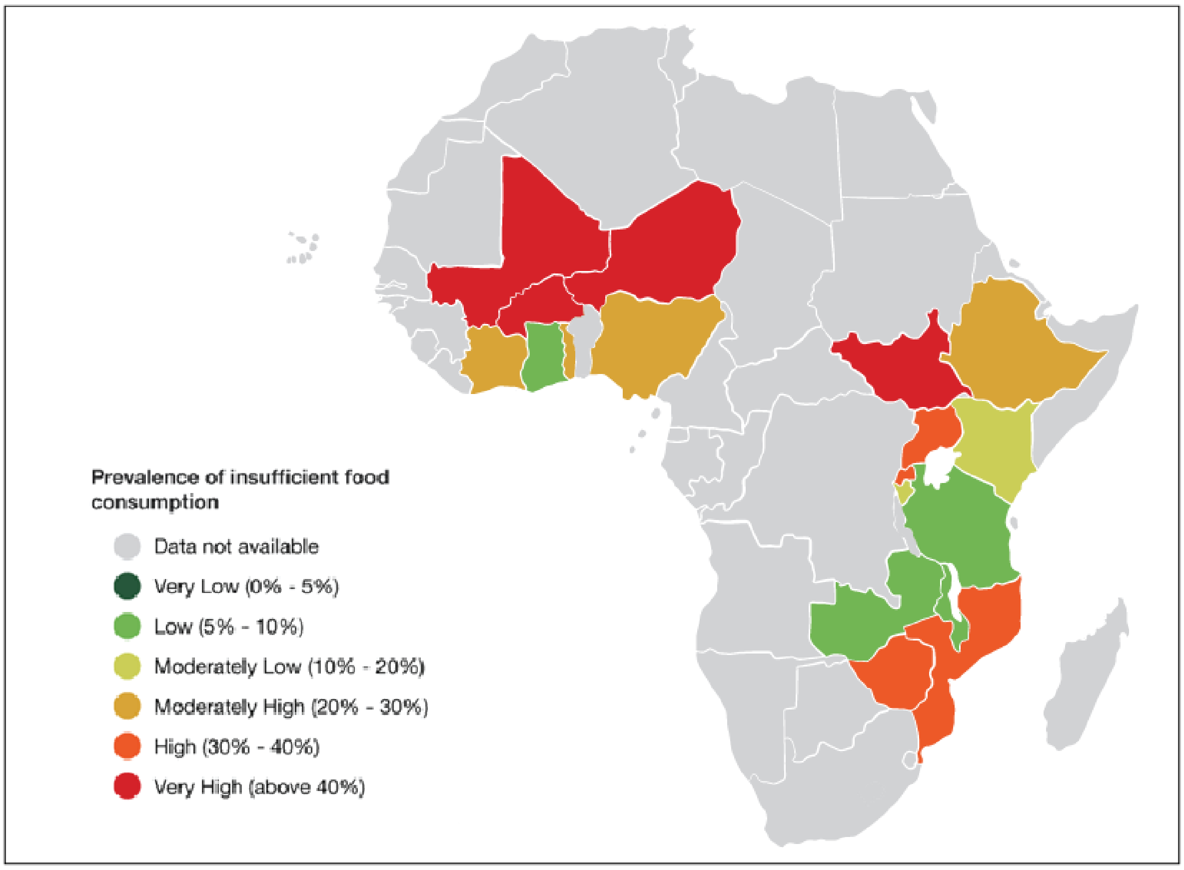
*Note: Last price is for July 2022, *August, **June, ***May, ****April, and *****March*

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

[6] 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 on the prevalence of insufficient food consumption[7] across 17 selected East, Southern and West African countries during the month of August. 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%).



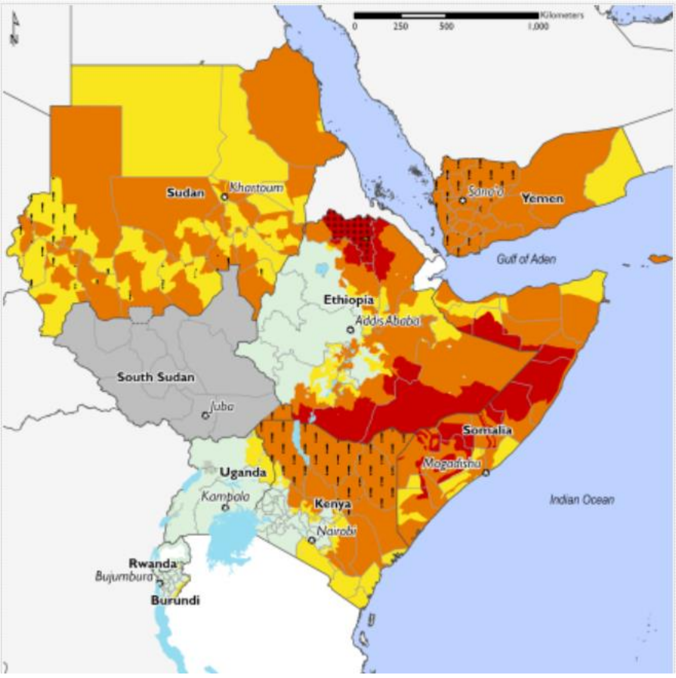
Source: Own analysis based on data from WFP (2022)[8]

Figure 3: Prevalence of Insufficient Food Consumption, August 2022

[7] **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).

[8] https://hungermap.wfp.org/.

East Africa Food Security Update



Food insecurity is expected to persist in many areas of the region due to multiple shocks and hazards: seasonal performance, economic under-performance, malfunctioning markets, rising food prices, knock on effects of conflicts/insecurity, displacement/migration, and destitution following the loss of livelihood assets.

Ethiopia: The food secutity situation remains dire with more than 20 million people estimated to be severly insecure. This is mainly due to the protracted conflict in the northern regions, drought in the Southern regions, and surging food prices which constrain access to food for large segments of the population.

Kenya: High food prices, driven by below-average production in 2021/2022, expected below-average production for 2022/2023, high market demand due to low household stocks, high inflation, and bottlenecks at the Kenya-Tanzania border following the enforcement of Tanzania's export permits, are constraining household purchasing power and food access in both urban and rural areas. As a result IPC Phase 4 (Emergency) outcomes are expected to persist in the absence of food assistance[9].

Rwanda: The ongoing season B harvest continues to replenish food stocks and improve incomes from increased labour demand in rural areas. This is driving widespread IPC Phase 1 outcomes across most rural areas and in Kigali, where increased economic activities are improving incomes. IPC Phase 2 outcomes are also being experienced among low-income urban households due to high food prices, which are contraining purchasing power[10].

Prevalence of insufficient food consumption

As of 30 August 2022, 59.6 million people across six selected East African countries did not have sufficient food for consumption. This represents a 2.5 % decrease from July 2022, indicating that the food security situation improved across these focus countries over the past month. In January 2022 and August 2021, this number stood at 50 million and 61.8 million people, respectively. This indicates that the food security situation across these selected countries has worsened since the beginning of the year but has improved compared to the same period 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 (Aug 2022)[11]

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 Aug 2021
Ethiopia	109.20	19.20	20.50	18.77	6.77	22.29	-22.89
Kenya	51.40	12.20	9.40	18.29	-22.95	79.41	56.41
Rwanda	12.30	2.70	28.00	227.64	937.04	8.00	8.00
South Sudan	11.00	6.50	6.90	62.73	6.15	-1.52	-1.52
Tanzania	56.30	5.40	5.10	9.06	-5.56	25.58	5.88
Uganda	42.70	15.10	14.90	34.89	-1.32	7.09	1.34

9 https://reliefweb.int/report/kenya/kenya-food-security-outlook-june-2022-january-2023
10 https://reliefweb.int/report/rwanda/rwanda-remote-monitoring-update-august-2022
11 https://hungermap.wfp.org/

**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 EA[12]

	Climatic Shocks	Droughts and flooding in many of the East African countries resulting in failed crops continue to be a driving factor behind increasing prices in the region.
	Conflicts	Conflicts and insecurity, particularly in South Sudan, Sudan, and Ethiopia, as well as the knock-on effect of the war in Ukraine continue to disrupt farming activities and supply of food in the region.
	Macroeconomic Shocks	Many East African economies continue to be under economic stress amidst the multiple shocks over the last two years. Sustained surges in inflation and interest rates, depreciation of local currencies, and increasing debt to GDP ratios in most of these countries continue to drive up food prices.

Overall, maize prices have remained well above their levels in 3 -12 months ago, with most selected markets' registering higher increases (>15%), many as high as 50 - 200%. Strong demands amidst supply shortages driven by weather shocks, conflicts and insecurity, as well as economic shocks from the fuel and food crisis continue to sustain these higher prices over the period. Nairobi continues to register lower maize prices compared to all the reference periods. It is not clear what is driving lower prices in Nairobi compared to other markets. Overall prices have increased over the past month in all markets with the exception of Nairobi, Rumbek, Moshi, and Lira, where prices are lower than they were a month ago. In Rwanda and Tanzania, where forecast data is available, prices are expected to ease in the next 3-6 months in anticipation of new harvests.

[12] The East African Food Security and Nutrition Working Group (FSNWG) 1st September 2022 report.

Table 3: Changes in maize prices in selected East African Countries[13]

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*	583.33	9.37 ↑	58.67 ⊗	120.47 ⊗	172.11 ⊗	-48.44 ↓	-35.94 ↓
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWF/KG*	551.67	10.50 ↑	51.12 ⊗	22.59 ⊗	113.55 ⊗		
Rwanda	Maize (white)	Mugera, Retail, RWF/KG*	414.44	8.35 ↑	19.92 ⊗	50.01 ⊗	85.57 ⊗		
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWF/KG*	429.17	2.57 ▲	21.69 ⊗	81.34 ⊗	113.06 ⊗		
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	418.70	28.08 ⊗	70.83 ⊗	136.13 ⊗	100.82 ⊗		
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	487.06	16.17 ⊗	19.76 ⊗	24.85 ⊗	49.26 ⊗		
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese	371.80	-63.26 ↓	25.60 ⊗	34.44 ⊗	-27.05 ↓		
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	514.80	20.00 ⊗	80.00 ⊗	200.00 ⊗	157.14 ⊗		
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	476.76	20.54 ⊗	85.22 ⊗	85.22 ⊗	62.63 ⊗		
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG**	94,154.00	17.61 ⊗	58.46 ⊗	56.49 ⊗	106.73 ⊗	-38.97 ↓	-44.94 ↓
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale,	82,577.00	9.54 ↑	56.17 ⊗	51.05 ⊗	59.08 ⊗	-45.07 ↓	-46.21 ↓
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG**	82,764.00	26.79 ⊗	35.68 ⊗	33.85 ⊗	125.72 ⊗		
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG**	79,626.00	21.86 ⊗	36.66 ⊗	39.18 ⊗	75.33 ⊗	-23.51 ↓	
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG**	68,019.50	-18.78 ↓	0.77 ▲	13.37 ↑		-0.12 ↘	
Uganda	Maize	Kabale, Wholesale, Uganda Shilling/kg***	1,354,957.00	6.08 ↑	24.14 ⊗	21.03 ⊗	121.41 ⊗		
Uganda	Maize	Kampala, Wholesale, Uganda	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 July 2022, *August, **June, ***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%)*

Changes in the prices of beans over the past 1-12 months in Rwanda, Tanzania, and Uganda are similar to what was observed for maize. All selected markets in Rwanda and Uganda have prices higher than in the past 1-12 months. The demand for beans was reported to be high as a result of Kenya driving up prices in its neighbouring countries.[14] A few markets in Tanzania, however, show declines in prices compared to certain periods. For instance, the current recorded price in Dodoma shows lower prices than they were 6 and 12 months ago, while current average prices in Morogoro are lower than 1 - 6 months ago. Prospects for the next 3-6 months show that prices of beans are likely be lower than currently.

[13] Author's construction based on data from WFP (2022) and FAO (2022)
[14] AGRA Price and Policy Monitor. Edition 5, August 2022

Table 4: Changes in bean prices in selected East African Countries[15]

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*	758.33	27.45 ⊗	128.76 ⊗	198.36 ⊗	126.37 ⊗		
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWF/KG*	766.67	4.66 ▲	89.12 ⊗	127.16 ⊗	67.27 ⊗	-55.40 ⬇	-48.77 ⬇
Rwanda	Bean (dry)	Mugera, Retail, RWF/KG*	618.89	0.02 ▲	76.92 ⊗	124.42 ⊗	40.92 ⊗		
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG*	668.33	7.81 ↑	85.16 ⊗	120.33 ⊗	49.35 ⊗		
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG**	187,885.00	10.52 ↑	8.40 ↑	19.93 ⊗	22.84 ⊗	-9.81 ↓	-14.57 ↓
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG**	205,577.00	3.02 ▲	9.98 ↑	-1.38 ↘	-0.40 ↘	-3.79 ↘	-4.59 ↘
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG**	156,500.00	-6.10 ↓	42.27 ⊗	32.25 ⊗	31.64 ⊗	-39.32 ⬇	-31.06 ⬇
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG**	189,375.00	-2.26 ↘	-4.32 ↘	-0.98 ↘	1.00 ▲	5.55 ↑	
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG**	198,419.38	4.43 ▲	7.25 ↑	7.25 ↑		-8.11 ↓	
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 July 2022, *August, **June, ***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%)*

In South Sudan, prices of sorghum are higher than they were in the past 1-12 months in all selected markets except in Rumbek, where the current price is lower than it was 6 months ago. The market that saw the most significant increase is Aweil, where the price surge ranges from 51 - 231% across the reference periods. In Rwanda, sorghum prices have declined or remained unchanged in Kigeme due partly to the season B harvests while in other markets prices have generally increased. In Ethiopia, minor increases in the prices of red and white sorghum were observed over the past 1-6 months. Nonetheless, these prices are still well above their one-year level by 30-67%.

Table 5: Changes in sorghum prices in selected East African Countries[16]

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	558.33	15.84 ⊗	26.41 ⊗	-6.94 ↓	29.02 ⊗		
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	500.00	-9.09 ↓	0.00 ●	0.00 ●	0.00 ●		
Rwanda	Sorghum	Mugera, Retail, RWF/KG	475.00	18.75 ⊗	20.25 ⊗	25.00 ⊗	35.71 ⊗	-10.88 ↓	-16.82 ⬇
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	450.00	12.50 ↑	12.50 ↑	12.50 ↑	28.57 ⊗		
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	442.16	51.27 ⊗	112.95 ⊗	231.76 ⊗	220.08 ⊗		
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	487.06	15.69 ⊗	14.68 ↑	25.13 ⊗	47.70 ⊗		
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG	362.36	15.18 ⊗	36.97 ⊗	-15.53 ⬇	68.93 ⊗		
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	486.20	14.63 ↑	71.37 ⊗	75.80 ⊗	70.68 ⊗		

*Note: Last price is for July 2022, *August, **June, ***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**, although harvesting of the secondary Belg season crops started in July and is ongoing in southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP, crop failures are projected in several areas, raising food security concerns. The planting of the 2022 main “Meher” season crops, for harvest from October, is almost complete in key production areas of western Oromiya, western Amhara and the Benishangul Gumuz region. The cumulative rains up to late July were average to above-average in most cropping areas, benefiting sowing and germination. In **Kenya**, the harvesting of the 2022 March

[15] Author’s construction based on data from WFP (2022) and FAO (2022).
[16] Author’s construction based on data from WFP (2022) and FAO (2022).

to May long rains season crops is ongoing in marginal agricultural areas. In the southeastern marginal agricultural areas of the country, the maize harvest is likely to be nearly 80 percent below the five-year average according to the KFSSG long rains season food security assessment, while green gram and cowpea production is expected to be around 85 percent and 95 percent below average[17]. In **Rwanda**, the season B harvest is ongoing and is helping replenish food stocks. Land preparation for the Season C and A land preparation amidst a below-average Season A rainfall forecast from September to December. These below-average rains together with the increased cost of agricultural inputs, will likely reduce crop yields for Season C 2022 and Season A 2023[18].

Southern Africa Food Security Update

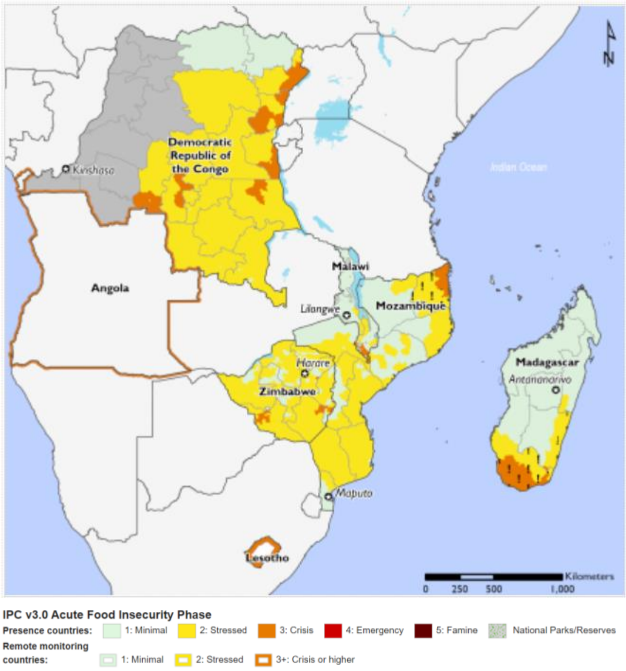


Figure 5: Southern Africa countries Food Security Outlook, Jun - Sep 2022

The lean season is set to start earlier than usual across most deficit producing areas in the region due to the droughts and cyclones that impacted the season.

Malawi: Increasing cost of living, driven by worsening macroeconomic conditions, are limiting households' access to food. IPC Phase 2 outcomes remain prevalent across the Southern parts of the country with a transition to IPC Phase 3 outcomes expected as conditions continue to deteriorate. The Northern and Central parts of the country continue to enjoy IPC Phase 1 outcomes, which are expected to persist until September[19].

Mozambique: The country experienced varied outcomes during the month with households in the drought-affected areas of southern Mozambique, flood- and tropical storm-impacted areas of Nampula; and the conflict-affected areas of Cabo Delgado/ Crisis (IPC Phase 3) all experiencing reduced incomes available for food purchase. In Cabo Delgado, Stressed! (IPC Phase 2!) outcomes are present in areas where humanitarian partners have access to IDPs and host communities, and where food distribution is consistent. While most households across the country enjoyed IPC Phase 1 outcomes, an increasing number are expected to transition to IPC Phase 3 from October 2022 to January 2023, as the lean season sets in[20].

Zambia: An estimated 1.35 million people in the country are experiencing IPC Phase 3 outcomes, which are expected to last until September 2022 due to high food prices and climatic shocks. Food insecurity is expected to worsen coinciding with the lean season between October 2022 and March 2023, as an additional 34 districts across the country are expected to move to IPC Phase 3 outcomes[21].

Zimbabwe: The number of households facing IPC Phase 3 outcomes in deficit-producing regions has been increasing since the onset of the lean season earlier in the month. Despite the macroeconomic situation having stabilised following measures from the Central Bank, food prices remain above average in both local currency and USD terms, thus constraining food access among many low-income households across the country[22].

[17] https://reliefweb.int/report/kenya/kenya-key-message-update-rising-maize-prices-reduce-household-purchasing-power-particularly-pastoral-areas-july-2022
[18] https://reliefweb.int/report/rwanda/rwanda-remote-monitoring-update-august-2022
[19] https://reliefweb.int/report/malawi/malawi-key-message-update-worsening-macroeconomic-conditions-drive-increased-living-costs-limiting-financial-access-food-july-2022
[20] https://reliefweb.int/report/mozambique/mozambique-food-security-outlook-update-august-2022
[21] https://reliefweb.int/report/zambia/zambia-ipc-acute-food-insecurity-analysis-july-2022-march-2023-published-august-30-2022
[22] https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-outlook-update-august-2022

Prevalence of insufficient food consumption

As of 30 August 2022, the number of people with insufficient food for consumption across four selected countries in Southern Africa stood at 20.4 million. This represents a 6.8 percent increase from July 2022, indicating that the region's food security situation deteriorated over the reporting period. In January, this year and July last year, these numbers stood at 16.5 million people and 21.1 million people, respectively. This shows that while the food security situation across these selected countries has worsened since the beginning of the year, it has slightly improved compared to the same period last year. Table 6 provides an update of how the prevalence of insufficient food consumption changed across each of the selected Southern Africa countries during the month.

Table 6: Prevalence of insufficient food consumption in selected Southern African Countries (Aug 2022)[23]

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 Aug 2021
Malawi	18.10	3.80	3.80	20.99	0.00	65.22	65.22
Mozambique	29.50	7.50	8.60	29.15	14.67	11.94	-30.56
Zambia	17.40	2.50	2.40	13.79	-4.00	4.17	13.64
Zimbabwe	14.40	5.30	5.60	38.89	5.66	3.92	-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 region[24]

	Climatic Shocks	The aftermath of the cyclones and dry conditions in the Southern Africa sub-region have led to poor harvests, especially in Malawi, which is driving up food 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, reflected in increasing inflation, and depreciation of local currencies, which is contributing to high food prices and increased cost of living.

Malawi continues to experience higher food prices with maize prices rising by between 19 and 122% compared to the past 1-12 months, mainly due to the effects of droughts and cyclones during the past season, seasonal decline in supplies, devaluation of the local currency due to foreign currency shortages, rising fuel prices, and the knock-on effect of the government's price increase of maize through the state grain marketing company (ADMARC). Maize prices seems to be easing in Mozambique and Zambia due to available stocks from the May/June harvests. For instance, in Maputo, the current maize price is lower than it was 6-12 months ago — 30.97% against the past 6 months' level — while in Massinga, the current maize price is lower than all the reference periods. Similarly, the national average maize prices in Zambia show a decline compared to the past 1-3 months, ranging from 7-20% due to improvements in supplies from the past seasonal harvests. In fact, a recent report by USDA and GAIN estimates about 1.1 million metric tonnes of maize surplus in Zambia, which can be exported.

[23] https://hungermap.wfp.org/ Accessed 30 May 2022
[24] FEWSNET, 2022. https://fews.net/southern-africa. Accessed 6th September June 2022

Table 7: Changes in maize prices in selected Southern African Countries[25]

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		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 July 2022, *August, **June, ***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 **Mozambique**, the harvesting of the main 2022 season cereal crops was completed in June, and the total cereal production, including the minor secondary season crops to be harvested in the third quarter of the year, is forecast at a below-average level of 2.6 million tons in 2022, pending official estimates[26].

West Africa Food Security Update

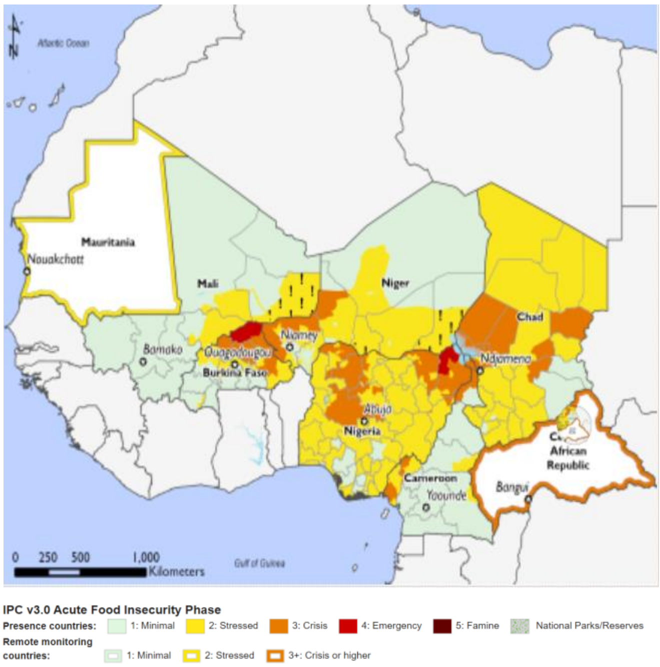


Figure 6: West Africa countries Food Security Outlook, Jun-Sep 2022

Staple food prices remain above their five-year average despite some slight monthly declines and price stability.

Burkina Faso: Market supply disruptions in conflict affected regions is leading to food shortages, and driving up food prices. This has constrained household access to food leading to IPC Phase 4 outcomes[27].

Mali: Despite ECOWAS lifting economic sanctions the country's economic activities and trade flows, continue to be negatively impacted by effects of the sanctions and the Ukrainian crisis leading to price inflation for food and non-food items. As the country undergoes its lean season, access to markets among low-income households has been constrained by high food prices, which are above their five-year average. IPC Phase 3 outcomes are being experienced among the low-income households in insecure northern areas, in the Liptako Gourma region. Meanwhile, the Western Sahel and the Niger River Valley are experiencing Stressed (IPC Phase 2) situations, expected to last until September 2022[28].

[25] Author's construction based on data from WFP (2022) and FAO (2022).
[26] https://www.fao.org/giews/countrybrief/country.jsp?code=MOZ
[27] https://reliefweb.int/report/burkina-faso/burkina-faso-mise-jour-sur-la-securite-alimentaire-liquidation-et-destruction-des-biens-productifs-dans-les-zones-sous-blocus-engendrant-linsecurite-alimentaire-durgence-phase-4-de-lipc-septembre-2022
[28] https://fews.net/west-africa/mali/food-security-outlook/june-2022

Niger: Food access remains a major challenge for the country's poor households, not only because of civil insecurity, which seriously disrupts livelihoods, but also because of a rise in food prices that reduces households' purchasing power[29].

Nigeria: Food prices remain significantly higher than average and compared to last year due to poor macroeconomic conditions, high fuel costs, above-average market demand and high global food prices. Annual inflation remains high — at 17.71% as of May — while the Naira continues to depreciate. Emergency (IPC Phase 4) results are expected in the inaccessible areas of the northeast, and widespread Crisis (IPC Phase 3) and Stress (IPC Phase 2) will exist in much of the north until at least September[30].

Prevalence of insufficient food consumption

The number of people with insufficient food for consumption across seven selected countries in West Africa was 114.4 million as of 30 August 2022. This was a 6.2 percent increase from the previous month, suggesting that the region's food security situation deteriorated from the previous month. In January 2022 and August 2021, this number stood at 89.8 million and 108.6 million people, respectively. This shows that the food security situation has worsened since the beginning of the year and compared to the same period last year. Table 8 provides an update of how the prevalence of insufficient food consumption changed across each of the selected West African countries during the month.

Table 8: Prevalence of insufficient food consumption in selected West African countries (June 2022)[31]

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 Aug 2021
Burkina Faso	19.80	10.80	12.40	62.63	14.81	-6.09	-4.42
Cote d'Ivoire	25.10	5.20	5.00	19.92	-3.85	-3.70	15.56
Ghana	29.80	6.40	7.00	23.49	9.37	18.52	16.36
Mali	19.10	11.30	12.40	64.92	9.73	-5.04	5.61
Niger	22.40	17.00	17.40	77.68	2.35	29.77	37.10
Nigeria	202.80	55.10	57.70	28.45	4.72	-2.13	-11.13
Togo	7.90	2.10	2.50	31.65	19.05	0.00	-4.55

**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 the price movements in West Africa include[32]:

	**Insecurity & Armed Conflicts**	Conflicts in parts of the West African sub-region continue to affect agricultural and trading activities and are preventing recovery and creating price increases.
	**Economic Shocks**	The spill-over effects of COVID-19, the global food and fuel price crisis, and effects from the war in Ukraine are causing economic deterioration in most African countries including those in West Africa. Most economies in the West African region are experiencing massive depreciation of local currencies, high inflation and interest rates. as well as high debt to GDP ratios. These are driving up food prices and the cost of living.

[29] https://fews.net/west-africa/niger/food-security-outlook/june-2022
[30] https://fews.net/west-africa/nigeria/food-security-outlook/june-2022
[31] https://hungermap.wfp.org/ Accessed 30 May 2022
[32] FEWSNET, 2022. Accessed at https://fews.net/west-africa on 7th August 2022.

Seasonal Changes

Most countries in the West African region have begun harvesting from the long rain season, which may be positively influencing lower food prices.

In almost all selected markets in West Africa, changes in **maize** prices show a decline over the past month. Specifically, all selected markets in Ghana have recorded a decline or stability of maize prices over the past month, while observed price changes in Togo and Nigeria are largely showing declining trends across almost all selected markets over the past 1-3 months. The favourably low prices in the region may be attributable to an improvement in supplies due to on-going harvests in most parts of the sub-region as well as release of stocks from national strategic grain reserves, particularly in Nigeria.[33] This notwithstanding, markets such as Korhogo, Kayes Centre, Niarela, Ibadan, Maiduguri, and Kara show low to moderate increases in maize prices over the past month. Overall, current prices in Cote d'Ivoire, Ghana, Mali, and Nigeria are still well above what was recorded 6 and 12 months ago. Prices are expected to decline as new harvests take place in the next 3-6 months.

Table 9: Changes in maize prices in selected West African countries[34]

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	341.18	16.82	22.58	53.77	45.91	-16.82	-21.52
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	12.82	50.69	52.78		
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG**	339.08	0.00	0.02	24.43	42.18		
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG	511.37	-0.01	18.42	44.46	26.22		
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG	312.00	-3.89	-6.87	42.32	19.29		
Mali	Maize (white)	Ansongo, Retail, XOF/KG	350.00	0.00	0.00	27.27	41.70	-14.67	-5.46
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	350.00	0.00	16.67	27.27	55.56		
Mali	Maize (white)	Faladié, Retail, XOF/KG	325.00	-7.14	10.54	30.00	48.40	-20.36	-11.26
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	430.00	7.50	14.67	43.33	72.00	-23.94	-15.07
Mali	Maize (white)	Niarela, Retail, XOF/KG	375.00	5.34	15.38	50.00	71.23	-28.11	-21.01
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	290.00	-1.69	-4.92	-2.36	18.37		
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	240.00	-5.88	-10.78	-4.00	-5.88		
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	260.00	0.00	-3.35	7.44	1.96		
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	280.00	3.70	0.00	4.09	4.48		
Togo	Maize (white)	Korbongou, Retail, CFA Franc BCEAO/KG	290.00	-3.33	-12.12	-17.14	3.57		
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	260.00	-1.89	-3.70	4.00	13.04		

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

The price of **millet** in the West African sub-region are still above their recorded levels compared to the past 6 and 12 months. In Burkina Faso and Niger overall prices are higher than they were 1-3 months ago, although prices in some selected markets have begun to fall. For instance, prices in Batie (Burkina Faso) and in the majority of selected markets in Mali and Nigeria have either fallen or remained unchanged over the past month. Similarly, prices in markets such as Batie, Gao, Abalak, Kaura Namoda, and Maiduguri have also fallen compared to 3 months ago. Again, these declines may be attributed to improvements in supplies from on-going seasonal harvests and from food assistance in the region.

[33] AGRA Price and Policy Monitor, No.5 August 2022.
[34] Author's construction based on data from WFP (2022) and FAO (2022).

Table 10: Changes in millet prices in selected West African countries[35]

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	338.00	-4.52	-9.38	32.03	6.96		
Burkina Faso	Millet	Bousse, Retail, XOF/KG	347.00	0.29	2.36	29.00	55.61		
Burkina Faso	Millet	Dori, Retail, XOF/KG	444.00	4.72	1.14	33.33	61.45		
Burkina Faso	Millet	Faramana, Retail, XOF/KG	303.00	4.12	0.00	41.59	92.99		
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	409.00	0.25	3.54	39.12	79.39		
Burkina Faso	Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	436.00	7.65	4.56	43.42	75.81		
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	376.00	19.75	16.77	51.00	62.07		
Burkina Faso	Millet	Titao, Retail, XOF/KG	424.00	1.68	11.58	66.93	107.84		
Mali	Millet	Ansongo, Retail, XOF/KG	388.00	3.47	3.47	19.38	94.00		
Mali	Millet	Badalabougou, Retail, XOF/KG	425.00	-5.56	6.25	41.67	99.53		
Mali	Millet	Faladié, Retail, XOF/KG	400.00	0.00	6.67	33.33	100.00		
Mali	Millet	Gao, Retail, XOF/KG	400.00	-3.15	-2.44	16.62	50.94		
Mali	Millet	Kayes Centre, Retail, XOF/KG	475.00	-5.00	22.42	58.33	73.99		
Mali	Millet	Niarela, Retail, XOF/KG	400.00	0.00	0.00	45.45	100.00		
Niger	Millet	Abalak, Retail, XOF/KG	360.93	-13.44	-2.45	4.62	7.42	11.31	
Niger	Millet	Bonkaney, Retail, XOF/KG	353.00	6.97	11.01	21.72	20.07		
Niger	Millet	Goure, Retail, XOF/KG	383.00	8.19	10.06	21.97	9.12		
Niger	Millet	Katako, Retail, XOF/KG	360.00	6.82	6.82	22.45	22.45	-4.02	2.25
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 July 2022, *August, **June, ***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 remained generally well above their recorded levels 6-12 months ago. However, price increases have slowed and, in some markets, declined or stabilised over the past 1-3 months. For instance, prices in Ansongo, Gao, and Lome have remained unchanged over the past 1-3 months, while Abalak and Anie have experienced price declines across the period. On the other hand, prices in Kayes Centre, Niarela. Katako, Goure, Kano, and Lagos have experienced moderate increases over the past 1-3 months. In Togo, with the exception of Anie and Lome, the selected markets have recorded higher prices than in the past 1-12 months. Improvements in supplies from food assistance and ongoing harvests are having dampening effects on prices in some markets of the region.

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

Table 11: Changes in sorghum prices in selected West African countries[36]

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	0.00	0.00	50.00	66.67	-32.62	-30.49
Mali	Sorghum	Badalabougou, Retail, XOF/KG	381.00	-9.07	8.86	38.55	90.50		
Mali	Sorghum	Faladié, Retail, XOF/KG	381.00	-4.75	12.72	48.83	90.50		
Mali	Sorghum	Gao, Retail, XOF/KG	400.00	0.00	0.00	60.00	60.00	-36.11	-34.19
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	403.00	0.75	3.87	30.84	61.20		
Mali	Sorghum	Niarela, Retail, XOF/KG	388.00	3.47	8.99	44.24	94.00		
Niger	Sorghum	Abalak, Retail, XOF/KG	307.64	-9.25	-12.60	-6.49	-4.46		
Niger	Sorghum	Bonkaney, Retail, XOF/KG	311.00	-0.32	1.30	6.51	7.99	-6.39	-0.88
Niger	Sorghum	Goure, Retail, XOF/KG	341.00	11.44	2.40	21.79	6.23		
Niger	Sorghum	Katako, Retail, XOF/KG	323.00	0.94	3.19	9.86	8.75	-3.48	4.56
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	0.00	-5.08	-5.72	-6.67		
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	300.00	11.11	20.00	27.66	32.74		
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	330.00	6.80	17.86	19.57	6.45		
Togo	Sorghum	Korbongou, Retail, CFA Franc BCEAO/KG	310.00	6.90	21.57	25.51	34.78		
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	320.00	0.00	0.00	1.59	1.59		

*Note: Last price is for July 2022, *August, **June, ***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

In **Burkina Faso**, green harvests are expected to start from mid-September following the early or timely onset of the rainy season. This will help reduce households' dependence on markets for food supplies particularly in in the calmer areas of the south of the country[37]. The 2022/23 agricultural campaign in **Mali** has started, following the first rains received in June. Normal to excess rains is being forecast but challenges of accessing agricultural inputs (fertilizers, seeds) and insecurity will likely lead to below-average harvests[38]. In **Niger**, the 2022/23 agricultural campaign is underway across the country, with sowing estimated to have been completed by 51 percent of the country's villages as of June 2022. However, rains recorded in the pastoral zones of the country have been low and are unlikely to lead to improvements in pasture conditions[39]. In **Nigeria**, harvests are forecast to start in September, and this is expected to lead to a decline in food prices as market supply increases.

[36] Author's construction based on data from WFP (2022) and FAO (2022)
[37] https://reliefweb.int/report/burkina-faso/burkina-faso-mise-jour-sur-la-securite-alimentaire-liquidation-et-destruction-des-biens-productifs-dans-les-zones-sous-blocus-engendrant-linsecurite-alimentaire-durgence-phase-4-de-lipc-septembre-2022
[38] https://fews.net/west-africa/mali/food-security-outlook/june-2022
[39] https://fews.net/west-africa/niger/food-security-outlook/june-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 AfCFTA's Hub digital platform was launched on July 8th, 2022, at the Boma of Africa event convened to mark the Africa Integration Day. The AfCFTA Hub (www.afcfta.app) is an interconnected clearinghouse or nexus for national government, intergovernmental, private, and public digital and partnership platforms to engage SMEs and start-ups to participate and benefit from the AfCFTA (the African Continental Free Trade Area)[40].
- The AfCFTA secretariat has revealed that Africa is now ready to trade under the continental trading policy following the unveiling of the e-tariff book, rules of origin manual and the AfCFTA website on which all necessary information can be accessed to trade within the AfCFTA[41].

East 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 East African region:

- Three Eastern Africa regional business councils have officially formed a continental business council, to spearhead the inclusion of private sector policy proposals into the negotiations of the African Continental Free Trade Area (AfCFTA) Agreement and the African Tripartite Free Trade Area (TFTA). Under the name African Tripartite Business Council, the council brings together the East African Business Council (EABC), Common Market for Eastern and Southern Africa (COMESA) and Southern African Development Community (SADC)[42].
- The East African Business Council (EABC) launched the EAC Small and Medium Enterprises (SMEs) online platform to ease access to cheap and affordable finances from the available capital in the region[43].

[40] https://au-afcfta.org/2022/08/the-african-continental-free-trade-area-afcfta-secretariat-launches-the-afcfta-hub/
[41] https://newsghana.com.gh/afcfta-secretariat-unveils-required-tools-and-instruments-for-trade/
[42] https://www.ktpress.rw/2022/08/afcfta-african-tripartite-business-council-established/
[43] https://www.newvision.co.ug/category/business/eabc-launches-online-smes-finance-access-plat-139922

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

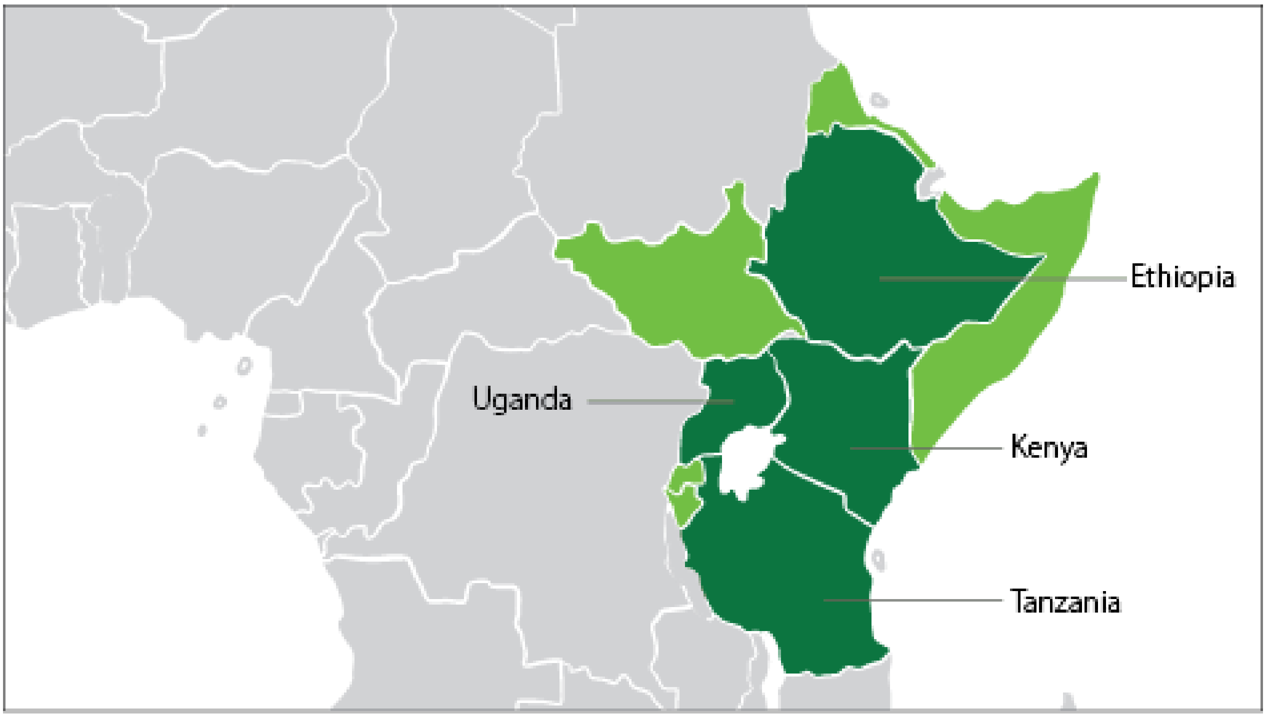


Figure 7: East Africa Cross border trade updates June 2022

KENYA

- Milk exporters and private sector players have expressed concerns over the delays in lifting of the ban by Uganda, three months after Uganda and Kenya completed talks with agreements that Kenya would verify and clear the exportation of milk to Uganda.
- The government has announced that traders risk up to Sh500,000 in fines or a year in jail if they fail to register online for clearance of all imports and exports on the National Electronic Single Window System, which is now the only entry point to register and clear all inbound and outbound cargo.
- Kenya has launched its National African Continental Free Trade Area (AfCFTA) Implementation Strategy 2022-2027 to boost opportunities for industrial diversification, investment and job creation.
- Europe has lowered the level of detection for chemical residues and pests on Kenya's produce in a move that will raise the level of checks on exports of fresh produce.
- The Kenyan government announced plans to end the flour subsidy programme in a move that will see a surge in flour prices for consumers.
- The Horticulture Directorate reported that horticulture earnings dropped by Sh32 billion in the first half of the year on the back of reduced returns from flowers, vegetables and fruits.
- The sugar directorate cut sugar imports by half following increases in domestic sugar production, which grew by 15% between Jan and Jul this year.

TANZANIA

- The latest statistics show that Tanzania exported a record 10,000 tonnes of meat to the Middle East in the first six months of this year.

ETHIOPIA

- The Ethiopian Prime Minister, Abiy Ahmed, inaugurated the Dire Dawa Free Trade Zone, the country's first free trade zone on the 15th of August.
- The development of free trade zones is said to be one of the major economic initiatives set as part of Ethiopia's 10-year development plan.

UGANDA

- Parliament has directed the Minister of State for Trade to withdraw a directive to the Commissioner, Customs Uganda Revenue Authority (URA), where she directed the Authority to stop clearing Value Added Tax (VAT) exempted rice imports at the borders.
- The Ugandan government has scrapped the Value added Tax (VAT) on imported rice from Tanzania after Uganda's President appealed to all the seven East African Community (EAC) member states to remove all non-tariff barriers.

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 African Export-Import Bank (Afreximbank) and the SADC Business Council (SADC BC) launched the SADC – Africa Trade and Investment Marketplace, which aims to promote regional trade, unlock investment opportunities, deepen economic cooperation, and drive sustainable business growth between the SADC region and the rest of Africa[44].
- COMESA Member States, through the European Union-backed Trade Facilitation Programme, have revised and adopted regulations for the elimination of non-tariff barriers (NTBs), a move which is expected to enhance intra-regional trade[45].

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.

[44] https://www.afreximbank.com/sadc-business-council-and-afreximbank-launch-the-sadc-africa-trade-and-investment-marketplace/
[45] https://www.comesa.int/trade-facilitation-programme-records-notable-progress/

West Africa Food Trade Updates

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 Nigerian Export Promotion Council (NEPC) has disclosed that the country exported products worth N1.77 trillion from January to June 2022 to different parts of the world.
- The non-oil sector recorded a significant growth in non-oil export as a total of 4.146 billion metric tons of products worth $2.593 billion were exported between January and June 2022.

GHANA

- The Chief Executive Officer (CEO) of the Ghana Export Promotion Authority (GEPA), Dr Afua Asabea Asare, has disclosed that the Authority will be establishing an Export School and Impact Hub in Kumasi.
- The Ghana International Trade and Finance Conference (GITFiC) is set to launch a comprehensive handbook that will enhance the level of sensitization on the framework of the African Continental Free Trade Area (AfCFTA).
- The National Chairman of the Poultry Farmers Association has expressed concern over the lack of regulation to check the dumping of chicken into the market. Ghana receives 600,000 metric tonnes of frozen chicken (equivalent to 569 million birds), valued at $600 million.
- The Ministry of Trade and Industry is implementing a National Export Development Strategy aimed at increasing Ghana's non-traditional export revenue to US$25 billion by 2029.

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