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FOOD SECURITY MONITOR

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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.

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 February Food Security Monitor are summarised below:

Global Food Security update

A total of 289,995 MT including wheat, maize, soybean, and barley were shipped to African countries during February 2023. The recipients of these shipments included Algeria, Egypt, Kenya, Libya, and Tunisia.

Regional Food Security Updates

Much of the East African region continues to experience atypically high food prices due to worsening macroeconomic conditions and persistent low domestic cereal supplies.

In Southern Africa, as the lean season progresses, household food stocks are declining, increasing market demand and resulting in seasonal increases of maize grain prices across monitored markets.

In West Africa, most areas continue to experience improvements in food security to minimal (IPC Phase 1) levels thanks to the main harvests that began in October, and those of market garden produce from January to March.

Food Trade

The African Development Bank, Africa Investment Forum, and AfricaGlobal Schaffer launched the Africa-USA Now, a new weekly video podcast spotlighting current events at the intersection of Africa and the United States.

In East Africa, a study on discriminative taxes in the East African Community shows that Kenya, Uganda, Rwanda, and Tanzania may be denying smaller EAC economies a chance at regional trade by levying irregular excise duty. The affected countries include Burundi and South Sudan.

In Southern Africa, the SADC's Payment Systems Subcommittee under the SADC Committee of Central Bank Governors (CCBG) convened its annual regional conference in Windhoek, Namibia, on 13th and 14th February 2023 to deliberate on the developments in the regional payment systems ecosystem.

In West Africa, The ECOWAS Bank for Investment and Development (EBID) has announced a dual-currency trade finance credit line totalling around $130 million, marking the first time it has secured funding support from the African Development Bank (AfDB).

Commodity Prices

In East Africa, changes in food commodity prices show mixed results. While prices show lower trends in Kenya, Rwanda, and Uganda, they tend to be generally higher in Ethiopia, South Sudan, and Tanzania than in the last 1-3 months. New harvests in December-January are dampening prices in some markets, while climate shocks, conflicts and insecurity, poor macroeconomic conditions, etc. continue to sustain higher prices in others.

In Southern Africa, maize prices generally remained elevated compared to the past 1–12-month in Malawi and Zambia. However, prices in Mozambique depict stability or are reporting some downward trends. Generally, changes in prices reflect seasonality patterns.

In West Africa, price movements generally show mixed results, except in Mali and Togo where downward trends dominate. Despite new harvests in the region, conflicts and insecurity in the region, as well as droughts and strong demand, continue to sustain higher prices.

Introduction

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

Food Security Dashboard

The Food Security Dashboard in table 1 provides a quick overview of the changes in the number of people that are food insecure, and the average changes in food[1] prices over the past 6 and 12 months. Overall, the number of people with insufficient food consumption[2] remains elevated in most monitored countries except in Cote d'Ivoire, Mozambique, Zambia, and Zimbabwe compared to the past 1-2 years. Also, Rwanda and Togo have experienced declines compared to February 2021. Changes in food commodity prices, on the other hand, show a decline in average prices in Burkina Faso, Cote d'Ivoire, Niger, Nigeria, Togo, and Uganda over the past 6 months, while compared to a year ago, only Mozambique and Togo reported declines.

Table 1: Changes in Food Security Situation and Commodities Price Changes

Country	Change in people with insufficient food consumption from Feb 2022		Change in people with insufficient food consumption from Feb 2021		Commodity Price Changes in the last 6 months		Commodity Price Changes in the last 1 year	
Burkina Faso	11.50	↑	4.13	↑	-11.29	↓	18.29	↑
Cote d'Ivoire	-25.45	↓	-18.00	↓	-14.14	↓	15.02	↑
Ethiopia	10.09	↑	61.07	↑	7.34	↑	29.05	↑
Ghana	66.67	↑	63.64	↑	41.05	↑	84.56	↑
Kenya	34.62	↑	26.51	↑	4.50	↑	112.32	↑
Malawi	172.41	↑	68.09	↑	59.76	↑	159.29	↑
Mali*	18.64	↑	45.83	↑	10.23	↑	15.82	↑
Mozambique	-49.51	↓	-42.22	↓	32.75	↑	-13.31	↓
Niger	29.05	↑	50.39	↑	-16.96	↓	8.23	↑
Nigeria	17.27	↑	23.95	↑	-0.19	↓	3.60	↑
Rwanda	20.00	↑	-14.29	↓	8.62	↑	74.62	↑
South Sudan	1.52	↑	9.84	↑	30.26	↑	133.74	↑
Tanzania	23.40	↑	1.75	↑	36.32	↑	99.82	↑
Togo	28.57	↑	-3.57	↓	-7.43	↓	-8.56	↓
Uganda	15.60	↑	20.74	↑	-12.45	↓	43.72	↑
Zambia	-13.79	↓	-19.35	↓	35.48	↑	38.55	↑
Zimbabwe	-17.31	↓	-21.82	↓				

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

[1] Maize is the main commodity being tracked on this dashboard, except in Mali, where we use millet. It should be noted that the price changes presented here are average price changes over a number of selected markets, which implies that in certain markets, the prices may actually be higher or lower.

[2] **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. It 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 oils and pulses a few times a week (FCS of less than 42). **Acceptable food consumption** typically refers to households that consume staples and vegetables every day, frequently accompanied by oils and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

Global Market Update

Black Sea Grain Initiative

A total of 289,995 MT of grains including wheat, maize, soybean, and barley were shipped to African countries in February 2023. The recipients of these shipments included Algeria, Egypt, Kenya, Libya, and Tunisia. The volumes of the different commodities shipped is provided in the table 2 below per country.

Table 2: Shipment of commodities under the Black Sea Grain Initiative

Country	Commodity	Volume traded (Feb 2023, MT)	Volume traded (Cumulative, MT)
Algeria	Wheat	-	181,770
Egypt	Wheat	16,500	202,200
	Soybeans	9,700	52,497
	Corn	81,945	423,931
	Sunflower meal	-	1,503
	Sunflower oil	-	3,100
Ethiopia	Wheat	5,000	197,759
Kenya	Wheat	25,000	208,546
Libya	Barley	44,000	95,281
	Corn	-	261,300
	Wheat	-	53,800
Morocco	Sunflower seed	-	35,990
Somalia	Wheat	-	53,500
Sudan	Wheat	-	65,340
Tunisia	Corn	30,050	176,398
	Barley	25,800	73,500
	Wheat	52,000	170,150
	Vegetable oil	-	3,300
	Soya oil	-	2,970

Source: United Nations[3]

Global Food Prices

The FAO Food Price Index (FFPI) has dropped for the 10th consecutive time, falling 17.9% from its peak in March 2022 (see figure 1). Similarly, the International Grains Council (IGC) Grains and Oilseeds Index (GOI) has dropped marginally by 0.1 points from 306.3 in December 2022 to 306.2 in January 2023. Stable cereal and meat price indices, and declined vegetable oil, dairy and sugar price indices, driven by demand dynamics, have sustained the dipping of the FFPI. As reported by the IGC, a perceived improvement in the availability of wheat resulted in wheat price declines in January 2023, while strong local and international demand for maize and rice caused a slight upward tick of the prices.

[3] https://www.un.org/en/black-sea-grain-initiative/vessel-movements

Figure 1: Global Food Commodity Prices[4]

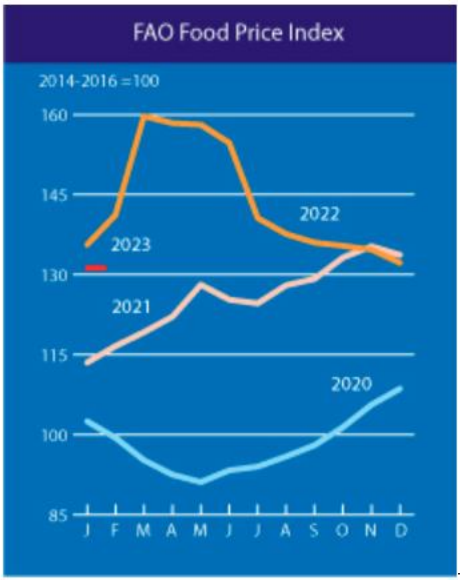


Table 3: IGC Commodity Price Indices

IGC commodity price indices

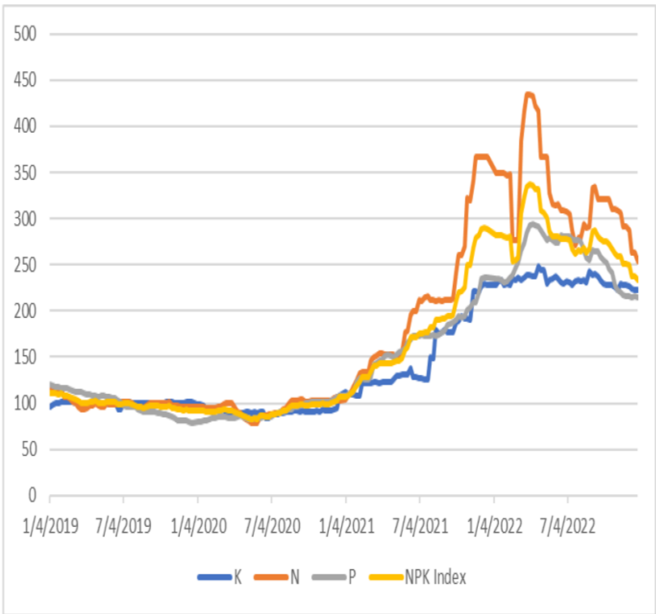
		GOI	Wheat	Maize	Rice	Soybeans
2022	January	**294.5**	288.4	294.2	166.8	288.9
	February	**315.4**	295.4	310.4	167.8	323.0
	March	**353.4**	353.6	369.7	169.6	344.0
	April	**349.6**	354.8	358.9	171.6	336.0
	May	**352.6**	375.3	347.9	177.3	334.3
	June	**343.3**	353.8	335.7	177.0	334.1
	July	**308.2**	302.5	299.7	174.3	306.3
	August	**309.4**	292.8	306.7	174.1	313.0
	September	**306.4**	299.9	307.4	179.5	303.3
	October	**309.6**	309.2	320.7	179.9	300.2
	November	**311.1**	300.2	314.4	183.1	308.0
	December	**306.3**	287.7	309.6	190.0	304.8
2023	January	**306.2**	280.3	310.7	198.2	305.9

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

Global Fertilizer Prices

Global fertilizer prices continue to decline, both on a month-on-month, and year-on-year basis, according to DTN fertilizer price tracking (see table 4). On year-on-year basis, urea and potash prices declined by 21.3% and 13.6%, respectively. Similarly, the International Fertilizer Price Index, defined by the main nutrient content in figure 2 below shows a continuous decline in fertilizer prices. According to the World Bank's food security update, global fertilizer prices were down 40% percent from their peak last spring as a result of a decline in the prices of natural gas prices, and the reopening of fertilizer plants in Europe.

Figure 2: International Fertilizer Price Index



Source: World Bank Food Security Update, Feb 2023

Table 4: Global Fertilizer Prices

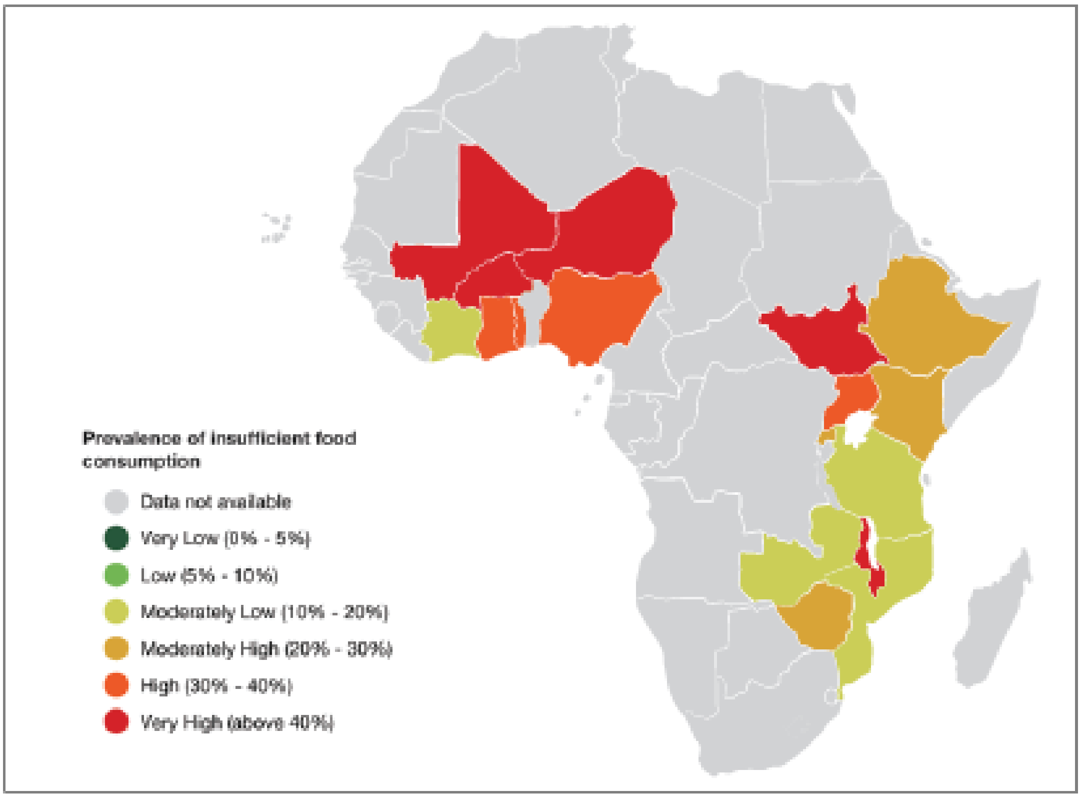
Date Range	DAP	MAP	POTASH	UREA
Jan 3-7 2022	863	931	807	913
Jan 31-Feb 4 2022	877	933	813	905
Feb 28-Mar 4 2022	879	937	815	887
Mar 28-Apr 1 2022	1033	1045	868	1022
Apr 25-29 2022	1049	1082	881	1004
May 23-27 2022	1056	1082	879	989
Jun 20-24 2022	1040	1058	885	902
Jul 18-22 2022	1007	1043	887	836
Aug 15-19 2022	978	1026	881	807
Sep 12-16 2022	952	1009	877	808
Oct 10-14 2022	925	986	863	824
Nov 7-11 2022	931	980	853	812
Dec 5-9 2022	920	950	819	784
Jan 2-6 2022	876	879	752	739
Jan 30-Feb 3 2023	847	862	704	698
% Change Jan 2 - Feb 3	-3.3	-1.9	-6.4	-5.5
% Change Feb 2022 - Feb 2023	-3.6	-8.0	-13.6	-21.3

Source: DTN

[4] FAO & AMIS. Accessed at https://www.fao.org/worldfoodsituation/foodpricesindex/en/ and https://www.amis-outlook.org/fileadmin/user_upload/amis/docs/Market_monitor/AMIS_Market_Monitor_current.pdf on 23rd February 2023

Food Insecurity and Hunger Hotspots Snapshot

Figure 3 provides a status update of the prevalence of insufficient food consumption[5] across 17 selected East, Southern and West African countries in February 2023. During the month, the number of food insecurity hotspots, defined as countries where more than 50 percent of the total population has insufficient food for consumption, remained at four. These were: South Sudan (60.9%), Burkina Faso (63.6%), Mali (73.3%) and Niger (85.3%).



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

Figure 3: Prevalence of Insufficient Food Consumption, February 2023

[5] **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. It 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 oils and pulses a few times a week (FCS of less than 42). **Acceptable food consumption** typically refers to households that consume staples and vegetables every day, frequently accompanied by oils and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

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

East Africa Food Security Update

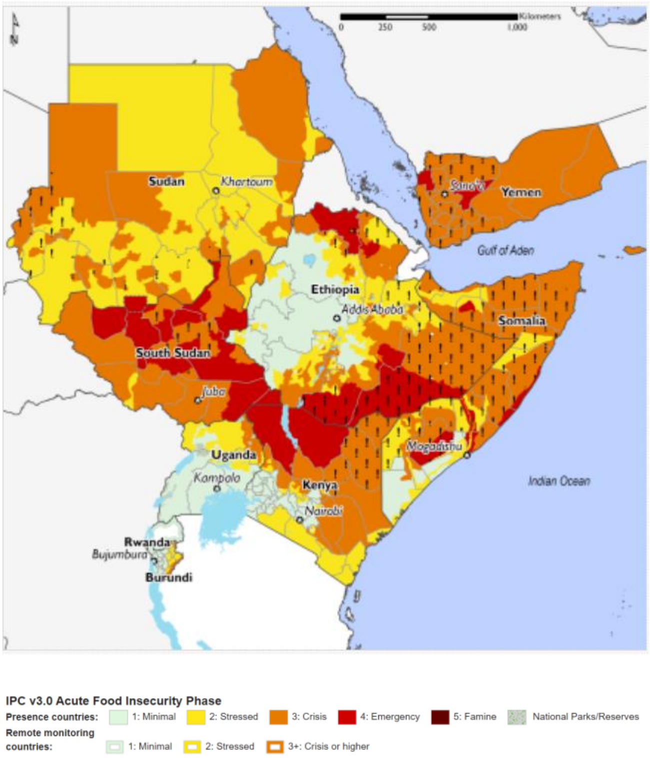


Figure 4: East Africa countries Food Security Outlook, Feb-May 2023

Kenya: Food insecurity remains high in the country driven by multiple shocks including a fifth successive below-average rainy season, that was short-lived and poorly distributed in space, resulting in below-average crop production, poor livestock conditions, and higher exposure to livestock disease. However, there were slight improvements in food insecurity across the ASAL areas due to the impact of the rains on the livelihoods in these areas. These improvements are expected to last a limited time with the situation projected to deteriorate from March to June 2023.[7]

Rwanda: The ongoing Season A harvest, which is helping replenish food stocks and contributing to some declines in food prices, is driving improvements in food security leading to IPC Phase 1 outcomes across the country[8].

Uganda: IPC Phase 2 outcomes are expected to persist until March in greater northern and eastern Uganda, where crop production has been below average for several consecutive seasons. In Karamoja, continued insecurity amidst the ongoing lean season is disrupting normal livelihood activities, hindering household access to crop fields, livestock grazing areas, and markets. This is leading to IPC Phase 3 outcomes, which are expected to deteriorate to IPC Phase 4 as food consumption gaps widen[9]

Prevalence of insufficient food consumption

As of 28 February 2023, a total of 66.3 million people across six selected East African countries did not have sufficient food for consumption. This represents a 4.2% increase from the previous month, indicating that the food security situation deteriorated across these focus countries over that duration. All the monitored countries contributed to this upward trend except for Uganda, which recorded a decrease of 1.2%, over the period. The number of food insecure people in the region has increased when compared to a similar period last year (57.5 million people) and two years ago (52.0 million). Table 5 below provides updates of how the prevalence of insufficient food consumption changed across each of the selected East African countries during the month.

Table 5: Prevalence of insufficient food consumption across selected East African countries (Jan 2023)10

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 Feb 2022	Change in people with insufficient food consumption from Feb 2021
Ethiopia	109.20	23.50	24.00	21.98	2.13	10.09	61.07
Kenya	51.40	8.90	10.50	20.43	17.98	34.62	26.51
Rwanda	12.30	3.00	3.00	24.39	0.00	20.00	-14.29
South Sudan	11.00	6.20	6.70	60.91	8.06	1.52	9.84
Tanzania	56.30	5.50	5.80	10.30	5.45	23.40	1.75
Uganda	42.70	16.50	16.30	38.17	-1.21	15.60	20.74

[7] https://reliefweb.int/report/kenya/kenya-ipc-acute-food-insecurity-and-acute-malnutrition-analysis-february-june-2023-published-20-february-2023
[8] https://reliefweb.int/report/rwanda/rwanda-key-message-update-availability-season-harvest-drives-improvement-minimal-ipc-phase-1-january-2023
[9] https://reliefweb.int/report/uganda/uganda-key-message-update-karamoja-faces-early-and-prolonged-lean-season-due-poor-harvest-and-insecurity
[10] 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[11]

	Climatic Shocks	Extreme weather conditions, including droughts and floods particularly in South Sudan, continue to affect farming activities, resulting in below average productions and high prices.
	Conflicts	Conflicts and insecurity, particularly in Ethiopia, South Sudan, and Uganda continue to be a driving factor in food commodity price changes in the East African region.
	Macroeconomic Shocks	Poor macroeconomic conditions, particularly in Ethiopia, generally high food inflation, and high fuel and transport costs in most East African countries, continue to drive up food prices.
	Seasonal Harvests	New harvests in many parts of East Africa have led to some reduction in prices or counteracted the rate of increase in prices.

Ethiopia

In general, changes in staple prices in Ethiopia show mixed results, although in the past 1-3 months some declines, or low rate of increases have been seen (table 6). For instance, maize prices have declined in Addis Ababa and Bahirdar at rates of between 4% and 10%, while wheat prices have declined in Addis Ababa, Bale Robe, and Debre Marcos in ranges of between 2% and 10% over the last one month. In markets where increases were observed, the figures did not exceed 15%. On the flip side, overall food commodity prices are higher than they were a year ago, by between 18% and 39%. These were sustained by the several years of drought, conflict and insecurity, poor economic conditions, altogether contributing to below-average harvests from the meher and belg 2022 agricultural seasons.[12] In addition, the government of Ethiopia has reduced fuel subsidies in January, leading to a 7 percent increase in fuel prices, which may have resulted in further increases in transportation costs and food prices. Improvements in prices in some markets were driven by improvements in food access due to improvement in humanitarian and trader access as conflict situation in the Tigray region has calmed.[13]

Table 6: Changes in prices in Ethiopia[14]

[11] FEWSNET, 2023. https://fews.net/east-africa accessed on 24th February 2023.
[12] FEWSNET, 2023. https://fews.net/east-africa/ethiopia
[13] Ibid
[14] Author's construction based on data from WFP (2023) and FAO (2023)

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize	Addis Ababa, ETB/100 kg	2,822.50	-4.71	1.69	20.68	34.01
Maize	Bahirdar, ETB/100 kg	2,550.00	-10.53	-3.77	-5.56	21.43
Maize	Diredawa, ETB/100 kg	3,100.00	2.31	0.00	6.90	31.73
Sorghum (red)	Addis Ababa, ETB/100 kg	3,125.00	5.93	0.95	0.00	20.04
Sorghum (white)	Addis Ababa, ETB/100 kg	3,737.50	5.28	-10.48	1.98	18.46
Teff (mixed)	Addis Ababa, ETB/100 kg	5,225.00	8.11	8.22	8.97	28.10
Wheat (white)	Addis Ababa, ETB/100 kg	4,325.00	-9.80	1.12	4.22	32.34
Wheat (white)	Bale Robe, ETB/100 kg**	3,510.00	-10.00	-8.24	10.55	23.16
Wheat (white)	Debre Marcos, ETB/100 kg**	4,050.00	-2.41	8.00	6.58	39.66
Wheat (white)	Diredawa, ETB/100 kg	4,690.00	12.56	-1.26	5.63	23.42
Wheat (white)	Jimma, ETB/100 kg**	4,750.00	5.56	10.47	21.79	27.95
Wheat (white)	Shashemene, ETB/100 kg**	4,150.00	13.70	1.22	-1.58	29.69

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Kenya

Overall, maize prices in Eldoret and Nakuru, shown in table 7 below, are lower than they were in 1-3 months ago. In addition, maize prices were also down 22.57% in Nakuru compared to 6 months ago. These price declines were due to a surplus of about 6.7 million bags based on carryover stocks of 14.2 million bags, an estimated 400,000 bags to be imported from the region by private sector and 2 Million outside of COMESA, about 840,000 (90 kg) bags to be harvested from the 2022 long rain crops, and 1.6 Million bags to be harvested from the short rain crop.[15] In contrast, Eldoret has registered price surges of 31.56% and 112.32% above the figures of 6 and 12 months ago.

Fertilizer prices were also generally lower in January than they were in the previous 1 - 6 months. Specifically, nitrate, phosphate, and urea fertilizer prices were lower than in the past 1-6 months due to low seasonal demands. NPK fertilizers, on the other hand, experienced low increases (0 -5 %) compared to 3 - 6 months ago, but the prices were lower in January than in December 2022.

Table 7: Changes in prices in Rwanda[16]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Kenya	Calcium Ammonium Nitrate	National, USD/50kg	45.03	-0.84	-4.07	-7.02	
Kenya	Diammonium Phosphate	National, USD/50kg	51.09	-0.83	-3.51	-5.49	
Kenya	Maize	Eldoret, Wholesale, KS/kg***	53,000.00	-3.13	-11.17	31.56	112.32
Kenya	Maize	Nakuru, Wholesale, KS/kg	50,000.00	-7.41	-18.61	-22.57	
Kenya	NP 23-23-0	National, USD/50kg	51.22	-0.83	4.59	0.97	
Kenya	NPK 17-17-17	National, USD/50kg	51.22	-0.83	2.85	0.71	
Kenya	Urea	National, USD/50kg	49.79	-0.84	-4.58	-14.10	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

[15] Agriculture Transformation Office Update on 17th January 2023
[16] Author's construction based on data from WFP (2023) and FAO (2023).

Rwanda

Beans have recorded higher prices in February than the previous 1-12 months, except in Kabuga where the price of beans have declined by 22.48% compared to 3 months ago (table 8). This is against declines seen in January. FEWSNET noted that “the temporary decline in food prices, especially beans, is not expected to be sustained due to the impact of tight local and regional stocks – including setting aside some bean stocks for seeds for Season B – and high global food and fuel prices.”[17] Maize and sorghum, on the other hand, have seen stability or significant drops in prices over the past 1-3 months, hitting approximately 41-50% lower in Kabuga, for instance. This is attributed to the ongoing Season A harvests, which has increased household food stocks and improved market supplies.[18] Nonetheless, maize and sorghum prices also remain above their 6-12 levels, except in Kabuga where maize price is lower by 33.86%. The Season A maize and beans harvests are estimated to be lower than last year’s, making it the second consecutive season of declining maize and beans production.[19] In addition, annual food inflation remained high at 66 percent accompanied by high cost of fuel and transportation.

DAP, NPK, urea prices in Rwanda remained stable over the past 1-3 months. The prices of DAP and urea are lower by 0.96% and 1.82%, respectively, compared to 6 months ago due to low off-season demand.

Table 8: Changes in prices in Rwanda[20]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Kabuga, Retail, RWF/KG*	833.33	1.35	-22.48	13.31	227.87
Bean (dry)	Kigeme (Camp), Retail, RWF/KG*	1,154.39	17.11	4.13	52.39	242.04
Bean (dry)	Mugera, Retail, RWF/KG*	1,050.00	7.88	24.75	69.96	280.75
Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG*	1,042.11	10.73	9.57	49.78	243.55
DAP	National, RWF/KG***	824.00	0.00	0.00	-0.96	
Maize (white)	Kabuga, Retail, RWF/KG*	350.00	-41.26	-50.00	-33.86	32.28
Maize (white)	Kigeme (Camp), Retail, RWF/KG*	606.14	-18.66	-15.75	12.61	34.70
Maize (white)	Mugera, Retail, RWF/KG*	491.67	-18.13	-16.90	19.27	77.96
Maize (white)	Nyabiheke (Camp), Retail, RWF/KG*	600.00	-6.49	-8.59	36.46	153.52
NPK 17:17:17	National, RWF/KG***	882.00	0.00	0.00	0.00	
Sorghum	Kabuga, Retail, RWF/KG	700.00	-3.45	-4.55	25.37	16.67
Sorghum	Kigeme (Camp), Retail, RWF/KG	700.00	-6.67	0.00	40.00	40.00
Sorghum	Mugera, Retail, RWF/KG	500.00	-6.98	0.00	5.26	31.58
Sorghum	Nyabiheke (Camp), Retail, RWF/KG	600.00	0.00	20.00	33.33	50.00
Urea	National, RWF/KG***	754.00	0.00	0.00	-1.82	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

South Sudan

Food commodity prices are generally higher than they were in the past 1-12 months except in Gogrial, where sorghum prices were consistently stable or lower (table 9). Pockets of price drops were also seen in some markets compared to certain periods. For instance, maize, sorghum, and wheat flour prices declined against their six-month levels in Aweil, Rumbek, Tori, and Juba. Compared to the past one-month, maize prices dropped

[17] https://fews.net/east-africa/rwanda
[18] FEWSNET, 2023. https://fews.net/east-africa/rwanda
[19] Ibid
[20] Author’s construction based on data from WFP (2023) and FAO (2023).

in Juba, while both maize and sorghum prices remained unchanged in Gogrial, Torit and Wau. The most significant increase in sorghum prices over the last one year was reported in Aweil, where it exceeded 192%, followed by Rumbek at 184%. Conflicts and insecurity continue to disrupt livelihood activities, trade, and humanitarian access in South Sudan sustaining higher food prices. Below-average 2022 harvests and macroeconomic dynamics underpinned by high import costs, high fuel prices, and local currency depreciation are also contributing factors. Also, the aftermath of the 2022 floods, which affected over 1 million people in 36 counties continues to be felt across South Sudan as floodwaters are slow to recede.[21] Increased supplies through harvests and increased imports from Sudan and Uganda have contributed to the lower prices observed in some markets.[22]

Table 9: Changes in prices in South Sudan[23]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Juba, SSP/Kg	903.19	3.95	23.84	91.05	109.56
Groundnuts	Juba, SSP/Kg	1,525.00	6.05	58.36	15.18	65.22
Maize (white)	Aweil, SSP/Kg	376.95	14.61	10.29	-10.77	112.58
Maize (white)	Gogrial, SSP/Kg**	457.60	0.00	60.00	146.15	166.67
Maize (white)	Juba, SSP/Kg	745.89	-0.65	12.75	53.14	91.20
Maize (white)	Rumbek, SSP/Kg**	715.00	66.67	11.11	-29.34	167.95
Maize (white)	Torit, SSP/Kg	400.40	0.00	16.67	-22.22	133.33
Maize (white)	Wau, SSP/Kg**	572.00	2.15	-19.19	44.61	130.68
Sorghum (Feterita)	Aweil, SSP/Kg	522.81	33.92	58.68	15.33	292.27
Sorghum (Feterita)	Bor, SSP/Kg**	858.00	38.44	20.00	114.29	200.00
Sorghum (Feterita)	Gogrial, SSP/Kg**	135.85	0.00	-36.67	-32.53	-5.00
Sorghum (Feterita)	Juba, SSP/Kg	865.15	0.63	11.50	77.63	122.26
Sorghum (Feterita)	Rumbek, SSP/Kg**	715.00	36.39	-16.67	127.27	284.62
Sorghum (Feterita)	Wau, SSP/Kg**	572.00	0.00	-20.00	34.86	130.68
Wheat (flour)	Juba, SSP/Kg	1,175.00	3.25	48.73	-12.25	14.75

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Tanzania

Almost without exception, the most recent (December) prices of beans, maize, and rice recorded are higher than they were in previous months, with only the price of rice dropping by 1.57% in Morogoro compared to a month ago. AGRA's own data collection from the Tanzanian Ministry of Agriculture also suggests prices have been rising. For instance, as at mid-January, maize price has increased from TZS111,800 in December 2022 to TZS114,200 per 100kg bag, while rice price has increased from TZS178,000 to TZS196,700. Beans prices also surged from TZS288,500 in December to TZS190,100 in mid-January 2023. From the same data, only bulrush and finger millets have seen a drop in prices. The situation in Tanzania is reflective of seasonality patterns although some harvesting is expected in bimodal areas in January and February 2023.

Fertilizer prices, on the other hand, have been stable over the past 1-3 months or declined against their levels in the past 6 months, with nitrate and phosphate ticking down by 14.99% and 6.94%, respectively.

Table 10: Changes in prices in Tanzania[24]

[21] FEWSNET, 2023. https://fews.net/east-africa/south-sudan
[22] Ibid
[23] Author's construction based on data from WFP (2022) and FAO (2022).
[24] Author's construction based on data from WFP (2022) and FAO (2022).

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Arusha (urban), Wholesale, TZS/100KG**	290,000.00	11.54 ↑	25.25 ⊗	54.35 ⊗	85.11 ⊗
Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG**	298,500.00	17.06 ⊗	11.28 ↑	45.20 ⊗	43.19 ⊗
Bean (dry)	Kigoma, Wholesale, TZS/100KG**	277,778.00	15.74 ⊗	18.20 ⊗	77.49 ⊗	134.74 ⊗
Bean (dry)	Morogoro, Wholesale, TZS/100KG**	280,750.00	0.27 ▲	5.94 ↑	48.25 ⊗	46.80 ⊗
Bean (dry)	Moshi, Wholesale, TZS/100KG**	320,000.00	6.67 ↑			72.97 ⊗
Beans	National Average, TZS/100KG**	288,500.00	2.63 ▲	25.35 ⊗	54.36 ⊗	
Maize	National Average, TZS/100KG**	111,800.00	3.14 ▲	18.68 ⊗	42.78 ⊗	
Maize (white)	Arusha (urban), Wholesale, TZS/100KG**	111,545.00	15.59 ⊗	11.85 ↑	18.47 ⊗	85.39 ⊗
Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG**	114,700.00	4.27 ▲	24.15 ⊗	38.90 ⊗	109.82 ⊗
Maize (white)	Kigoma, Wholesale, TZS/100KG**	122,333.00	22.33 ⊗	15.35 ⊗	47.81 ⊗	97.84 ⊗
Maize (white)	Morogoro, Wholesale, TZS/100KG**	106,426.00	3.64 ▲	7.05 ↑	33.66 ⊗	86.02 ⊗
Maize (white)	Moshi, Wholesale, TZS/100KG**	132,000.00	10.00 ↑			120.00 ⊗
Nitrate fertilizer	National, TZS/KG***	601.00	0.00 ●	0.00 ●	-14.99 ↓	
Phosphate fertilizer	National, TZS/KG***	784.00	0.00 ●	0.00 ●	-6.94 ↓	
Rice	National Average, TZS/100KG**	278,000.00	2.21 ▲	22.17 ⊗	37.35 ⊗	
Rice (Wholesale)	Arusha (urban), TZS/100KG**	310,000.00	1.64 ▲	30.42 ⊗	37.78 ⊗	73.43 ⊗
Rice (Wholesale)	Dodoma (Majengo), TZS/100KG**	330,800.00	12.42 ↑	26.93 ⊗	54.14 ⊗	65.40 ⊗
Rice (Wholesale)	Kigoma, TZS/100KG**	247,778.00	15.25 ⊗	6.57 ↑	39.20 ⊗	55.84 ⊗
Rice (Wholesale)	Morogoro, TZS/100KG**	265,750.00	-1.57 ↘	2.21 ▲	18.77 ⊗	54.81 ⊗
Rice (Wholesale)	Moshi, TZS/100KG**	329,000.00	4.44 ▲			82.78 ⊗

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Uganda

Largely, maize prices in the three monitored markets of Uganda have declined due to the dampening effect of the new harvests from late December 2022 to February 2023. Nevertheless, the current prices are higher than their one-year levels. Except in Mbale, bean prices have recorded an increase over the past 1-12 months in Mbarara and Gulu, ranging from 1.56% and 86.51%. Despite the new harvests, most households are estimated to have exhausted their stocks due to 50-80 percent below normal harvests, and in certain parts, particularly in Karamoja, the lean season began two months earlier than in January 2023.[25] The trend is also attributed to tight regional supplies and above-average regional demand.

Table 11: Changes in prices in Uganda[26]

[25] FEWSNET, 2023. https://fews.net/east-africa/uganda
[26] Author's construction based on data from WFP (2022) and FAO (2022).

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Beans	Gulu, Wholesale, Uganda Shilling/KG	5,750.00	1.59	11.37	27.64	86.51
Beans	Mbarara, Wholesale, Uganda Shilling/KG	4,500.00	12.50	4.65	12.50	65.14
Beans	Mbale, Wholesale, Uganda Shilling/KG	3,125.00	-10.71	-15.54	-6.72	
Maize	Mbarara, Wholesale, Uganda Shilling/KG	2,500.00	0.00	0.00	0.00	85.19
Maize	Gulu, Wholesale, Uganda Shilling/KG	1,500.00	-25.00	-25.00	-14.29	2.25
Maize	Mbale, Wholesale, Uganda Shilling/KG	1,750.00	-22.22	-29.44	-23.08	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Seasonal Monitor and Crop Yield Forecasts

In **Kenya**, short-rain harvests are ongoing in Nyanza and parts of Western Kenya, while the current dry conditions across central and western parts of the country are supporting harvesting and drying conditions, helping reduce post-harvest losses[27]. In **Rwanda**, the season A harvests are ongoing and are helping replenish food stocks. Season A maize and beans harvests are expected to be lower than those recorded last season making this the second consecutive season of declining maize harvests[28].

[27] https://fews.net/east-africa/kenya
[28] https://fews.net/east-africa/rwanda/key-message-update/january-2023

Southern Africa Food Security Update

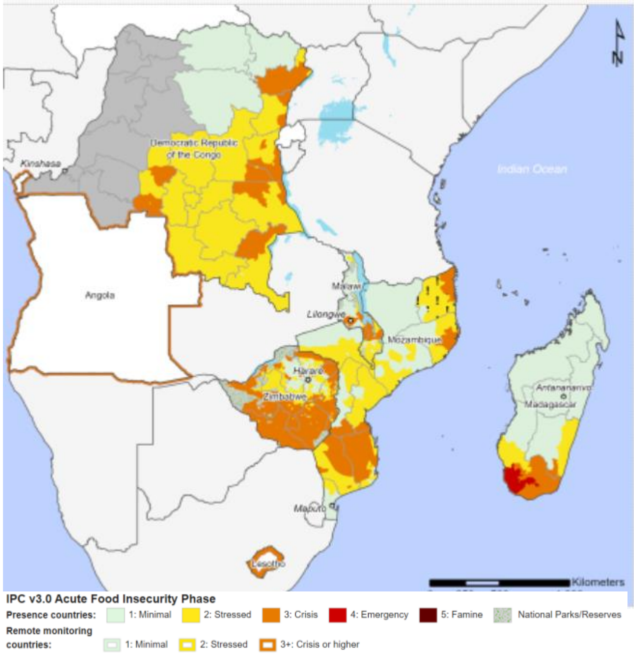


Figure 5: East Africa countries Food Security Outlook, Feb-May 2023

As the lean season progresses, household food stocks are declining, increasing market demand, and resulting in seasonal increases of maize grain prices across monitored markets[29].

Malawi: IPC Phase 2 and IPC Phase 3 outcomes are ongoing across most of the southern and central regions, and pockets of the northern region, amidst the ongoing lean season due to insufficient access to food driven by high prices[30].

Mozambique: As the lean season approaches its peak, most households are increasingly faced with IPC Phase 2 outcomes consuming their food stocks or purchasing food at local markets, where the prices of maize and dried cassava are normal. IPC Phase 3 outcomes are being experienced in the conflict-affected Cabo Delgado region, increasing the demand for humanitarian assistance[31].

Zimbabwe: Vulnerable urban households are experiencing IPC Phase 2 outcomes as costs of living continue to surge, while IPC Phase 3 outcomes are widespread across the rural deficit-producing areas of the south, east, west, and far north. These outcomes are expected to persist throughout the lean season, which will end in March as the early harvests kick in[32].

Prevalence of insufficient food consumption

As of February 28, 2023, the number of people with insufficient food for consumption across four selected countries in Southern Africa, was 19.9 million. This represents a 30.9 % increase from January 2023, indicating that the region's food security situation deteriorated across the monitored countries (table 12). When compared to the same period last year (21.3 million people) and two years ago (22.3 million people), the number of food insecure people in the region has decreased over both periods.

Table 12: Prevalence of insufficient food consumption in selected Southern African Countries (Jan 2023)[33]

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 Feb 2022	Change in people with insufficient food consumption from Feb 2021
Malawi	18.10	3.90	7.90	43.65	102.56 ↑	172.41 ↑	68.09 ↑
Mozambique	29.50	6.30	5.20	17.63	-17.46 ↓	-49.51 ↓	-42.22 ↓
Zambia	17.40	1.40	2.50	14.37	78.57 ↑	-13.79 ↓	-19.35 ↓
Zimbabwe	14.40	3.60	4.30	29.86	19.44 ↑	-17.31 ↓	-21.82 ↓

**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%)

29 https://fews.net/southern-africa
30 https://reliefweb.int/report/malawi/malawi-key-message-update-crisis-ipc-phase-3-outcomes-persist-high-food-prices-limit-household-access-food-january-2023
31 https://fews.net/southern-africa/mozambique
32 https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-and-markets-monitoring-report-january-2023
33 https://hungermap.wfp.org/

Commodity Prices

Key drivers of prices in the Southern Africa region[34]

	Seasonality Patterns	The Southern African region is in its lean season. Combined with strong regional demand, as well as poor past harvests, prices are generally under upward pressure in Malawi and Zambia.
	Weather Shocks	The effects of cyclone Gombe and dry spells in the southern part of Mozambique are holding back full price recovery from the highs seen in 2022.

Malawi

The overall prices of food commodities in Malawi, are generally high, except rice prices in Lilongwe, which remained stable over the past 1-3 months. The price of maize in Lilongwe has also declined by 23.89% between November and December 2022. Apart from these, maize prices are 12.83% to 280% higher than the past 3 - 12 months, while the price of rice is 16.67% to 126.67% higher. The higher trend of prices in Malawi reflects seasonality patterns as the country is in its lean season. Also, the country has less carryover stocks due to consecutive years of below-average crop production seasons.[35]

Whereas the price of nitrate fertilizer has declined compared to the past 1-3 months, but remains higher than 6 months ago, phosphate fertilizer prices have risen by 3.47% and 9.56% over the past 1 and 3 months, respectively.

Table 13: Changes in prices in Malawi[36]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Mzuzu, MWK/Kg**	1,112.50	11.00	12.83	60.77	122.50
Maize	Lilongwe, MWK/Kg**	325.00	-23.89	30.00	46.07	113.82
Maize	Liwonde, MWK/Kg	520.25	5.10	25.24	62.58	147.74
Maize	Mzimba, MWK/Kg	475.00	0.37	59.08	92.31	280.00
Maize	Mzuzu, MWK/Kg	462.00	1.93	37.09	49.03	208.00
Maize	National Average, MWK/Kg	495.25	5.77	34.00	59.76	159.29
Maize	Nsanje, MWK/Kg	565.25	13.90	36.80	67.23	150.11
Nitrate fertilizer	National Average, Retail, MWK/50KG**	63,000.00	-3.08	-9.35	28.57	
Phosphate fertilizer	National Average, Retail, MWK/50KG**	74,500.00	3.47	9.56		
Rice	Lilongwe, MWK/Kg**	1,400.00	0.00	0.00	16.67	45.83
Rice	Mzuzu, MWK/Kg**	1,700.00	13.00	25.93	104.20	126.67

*Note: Last price is for January 2023, *February, **December, and ***November*

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

[34] FEWSNET, 2023. https://fews.net/southern-africa. Accessed 27th January 2023
[35] FEWSNET, 2023. https://fews.net/southern-africa/malawi
[36] Author's construction based on data from WFP (2023) and FAO (2023).

Mozambique

The prices of maize and rice are generally stable or declined in Mozambique, except in Angonia and Massinga, where maize prices are higher compared to the past 3 – 6 months (table 14). In Angonia, the price of maize is up by 28.45% and 74.98%, while in Massinga it has risen by 23.81% and 21.12% compared to the past 3 and 6 months respectively. Apart from these, the price of rice also rose marginally in Massinga compared to the past 1 and 12 months. The price of NPK and urea fertilizers declined by 4.94% and 8.94% compared to the past one month. Droughts in the southern region, as well as cyclone Gombe, have led to below-average harvests of maize. The country is also in its lean season. However, humanitarian assistance and good harvests from other crops such as sweet potatoes and vegetables during the post-flood and second season lessened pressure on maize and rice prices.[37]

Table 14: Changes in prices in Mozambique[38]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Angonia, Retail, MZN/KG**	20.00	0.00	28.45	74.98	
Maize (white)	Maputo, Retail, MZN/KG	22.86	0.00	0.00	2.14	-11.74
Maize (white)	Massinga, Retail, MZN/KG	27.30	-1.16	23.81	21.12	-14.87
NPK	National, MZN/50KG	3,040.00	-4.94			
Rice (imported)	Angonia, Retail, MZN/KG**	60.00	0.00	-14.29	-8.48	
Rice (imported)	Maputo, Retail, MZN/KG	50.00	0.00	0.00	0.00	0.00
Rice (imported)	Massinga, Retail, MZN/KG	60.56	0.93	-1.13	0.00	5.01
Urea	National, MZN/50KG	3,176.67	-8.94			

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Zambia

The national average price of maize in Zambia shows higher trends compared to the past 1-12 months. Maize price is 6.48% higher in January compared to December but remained 38.55% higher than a year ago. A combination of the lean season and strong regional demands have led to reduced stocks, putting upward pressure on maize prices in Zambia. The price of urea is 9.11% lower than 6 months ago but has marginally risen above its levels in 1-3 months ago, while the D Compound fertilizer also rose by 8.89% above its December 2022 level.

Table 15: Changes in prices in Zambia[39]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
D Compound Fertilizer	National Average, Retail, ZK/50KG	931.00	8.89			
Maize (white)	National Average, Retail, Kwacha/KG	4.67	6.48	24.19	35.48	38.55
Urea (50 kg)	National Average, Retail, ZK/50KG	918.00	0.33	2.00	-9.11	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

[37] FEWSNET, 2023. https://fews.net/southern-africa/mozambique
[38] Author's construction based on data from WFP (2023) and FAO (2023).
[39] Author's construction based on data from WFP (2023) and FAO (2023).

Seasonal Monitor and Crop Yield Forecasts

Tropical Cyclone Freddy, which made a landfall in Mozambique on February 24 has led to significant rainfall in Mozambique and is expected to affect other countries in the region including Zimbabwe and Malawi, posing a threat to production prospects. In **Malawi**, the main crop production season is underway with rainfall performance improving significantly since January. However, risks of flash floods and localised dry spells remain high in traditionally affected areas. The 2023 harvest is expected to start in April with below-average harvests projected due to late and poor performance of the rainy season. Secondly, the number of farmers that received inputs under the Affordable Inputs Programme reduced from 3.7 million to 2.5 million this year due to economic constraints. Of these only 30% received inputs on time further affecting production prospects[40]. This is expected to impact the area under maize production and expected harvests as many farmers have shifted from maize to soybean production. In **Zimbabwe**, normal to above-normal rains are being forecast until the end of the season with crop conditions in the northern parts of the country ranging from ‘average’ to ‘good’ while in the southern region, it was mainly ‘mediocre’ to ‘poor’. Early harvests are expected to start in March in some parts of the country, which will help ease the food security situation[41].

West Africa Food Security Update

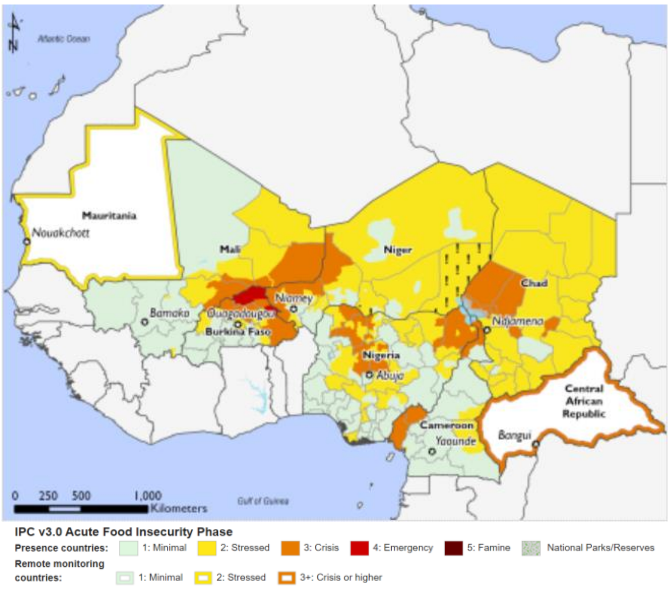


Figure 6: West Africa countries Food Security Outlook, Oct 2022- Jan 2023

Most areas are experiencing an improvement in food security to minimal (IPC Phase 1) thanks to the main harvests that began in October and those of market garden produce from January to March.[42]

Burkina Faso: Staple food prices remain high in areas under blockade due to food shortages as food distribution efforts are restricted. This is resulting in IPC Phase 4 outcomes. [43]

Mali: Ongoing IPC Phase 2 outcomes are expected to persist until May due to the decline in agricultural production in areas affected by insecurity and drought. The western Sahel regions are also faced with severe food insecurity due to the early depletion of stocks and above-average market prices[44].

Niger: The prices of staple food commodities remain high despite the ongoing harvests. These high prices, coupled with the depletion of food stocks is reducing food access leading to widespread IPC Phase 2 outcomes across the country[45].

Nigeria: Conflict and escalating tensions ahead of the country’s elections heightened the demand for food assistance leading to IPC Phase 3 outcomes being experienced in the northern parts of the country. These outcomes are expected to persist until May as high food demand in markets, high food prices, limited access to income, and poor humanitarian access are likely to remain in place.[46]

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[40] https://reliefweb.int/report/malawi/malawi-key-message-update-crisis-ipc-phase-3-outcomes-persist-high-food-prices-limit-household-access-food-january-2023
[41] https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-and-markets-monitoring-report-january-2023
[42] https://fews.net/west-africa
[43] https://reliefweb.int/report/burkina-faso/burkina-faso-key-message-update-des-penuries-en-denrees-de-base-persistent-dans-les-zones-sous-blocus-janvier-2023
[44] https://fews.net/west-africa/mali
[45] https://reliefweb.int/report/niger/niger-key-message-update-malgre-les-recoltes-les-prix-eleves-des-denrees-de-base-limitent-lacces-alimentaire-des-menages-pauvres-janvier-2023
[46] https://reliefweb.int/report/nigeria/nigeria-key-message-update-persisting-conflict-and-heightened-tension-ahead-election-drive-high-food-assistance-needs-january-2023

Prevalence of insufficient food consumption

The number of people with insufficient food for consumption across seven selected countries in West Africa stood at 126.7 million as of February 28, 2023. This is 8.4% increase from the last reporting period in November 2022, suggesting that the food security situation deteriorated across the region. The countries that contributed to this upward trend include Burkina Faso, Ghana, Mali, Niger, Nigeria, and Togo (table 16). When compared to the same period last year (106.5 million people) and two years ago (100.3 million people), the number of food insecure people across the region has increased over both periods.

Table 16: Prevalence of insufficient food consumption in selected West African countries (Jan 2023)

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 Feb 2022	Change in people with insufficient food consumption from Feb 2021
Burkina Faso	19.80	11.70	12.60	63.64	7.69 ↗	11.50 ↑	4.13 ↗
Cote d'Ivoire	25.10	4.40	4.10	16.33	-6.82 ↘	-25.45 ↓	-18.00 ↓
Ghana	29.80	6.70	9.00	30.20	34.33 ↑	66.67 ↑	63.64 ↑
Mali	19.10	13.90	14.00	73.30	0.72 ↗	18.64 ↑	45.83 ↑
Niger	22.40	18.00	19.10	85.27	6.11 ↗	29.05 ↑	50.39 ↑
Nigeria	202.80	59.50	65.20	32.15	9.58 ↗	17.27 ↑	23.95 ↑
Togo	7.90	2.70	2.70	34.18	0.00 ↗	28.57 ↑	-3.57 ↘

**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[47]:

	Insecurity & Armed Conflicts	Conflict and insecurity in parts of the West African region, particularly in Burkina Faso, Mali, Niger, and Nigeria, continue to disrupt agriculture, trade, and food assistance activities resulting in below-average food availability and sustaining high prices.
	Economic Shocks	Macroeconomic conditions, driven by high fuel and transport costs, and the depreciation of local currencies are pushing up food prices.
	Seasonal Harvests	Most countries in West Africa have had their main and minor harvestings improving supplies and driving prices down in some markets.

Burkina Faso

Table 17 below presents changes in the prices of maize and millet in selected markets in Burkina Faso, which show mixed results. For maize prices, while markets such as Batie, Bousse, Gourcy, and to some extent Faramana and Ouagadougou show declines, others such as Dori, Ouargaye, and Titao mostly show price increases. For millet, prices in markets such as Bousse, Gourcy, Ouagadougou, and Ouargaye mostly show declines while Batie, Dori, and Titao indicate increases. Most monitored markets show prices above their one-year level except Bousse, Faramana, Gourcy, and Ouargaye. Compared to December, maize prices declined the most in Batie (-7.02%) and surged the most in Dori (+16.01%). Millet price declined the most in Ouagadougou (-16.71) and surged the most in Titao (+7.5%). Despite new harvests in the south, stocks remain below the average food stock requirements of the country. Coupled with insecurity and conflicts in the north, as well as strong demand, there is upward pressure on food prices with current prices estimated to be close to 600% above their levels 5 years ago.[48] Fertilizer prices, on the other hand, are stable or have declined compared

[47] FEWSNET, 2023. Accessed at https://fews.net/west-africa on 27th January 2023.
[48] FEWSNET, 2023. https://fews.net/west-africa/burkina-faso

to the past 1-6 months. Both NPK and urea prices have declined between 18% and 28% over the past 3-6 months.

Table 17: Changes in prices in Burkina Faso[49]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Burkina Phosphate	National, XOF/kg***	4,500.00	0.00	0.00	0.00	
Maize	Batié, Retail, XOF/KG	265.00	-7.02	-1.12	-4.68	21.56
Maize	Bousse, Retail, XOF/KG	243.00	-2.02	-12.90	-17.35	0.00
Maize	Dori, Retail, XOF/KG	326.00	16.01	1.24	-8.17	19.41
Maize	Faramana, Retail, XOF/KG	159.00	-1.85	31.40	-29.96	-1.24
Maize	Gourcy, Retail, XOF/KG	260.00	0.00	-17.72	-17.72	1.17
Maize	Ouagadougo (Sankaryare), Retail, XOF/KG	259.00	7.47	-8.48	-22.22	3.60
Maize	Ouargaye, Retail, XOF/KG	209.00	11.17	22.94	-13.28	7.18
Maize	Titao, Retail, XOF/KG	475.00	13.37	25.99	23.06	94.67
Millet	Batié, Retail, XOF/KG	413.00	2.74	2.48	22.19	61.33
Millet	Bousse, Retail, XOF/KG	314.00	-12.53	-27.98	-9.51	16.73
Millet	Dori, Retail, XOF/KG	411.00	0.98	6.20	-7.43	23.42
Millet	Faramana, Retail, XOF/KG	220.00	2.80	-29.71	-27.39	2.80
Millet	Gourcy, Retail, XOF/KG	271.00	-2.17	-33.74	-33.74	-7.82
Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	334.00	-16.71	-25.61	-23.39	9.87
Millet	Ouargaye, Retail, XOF/KG	247.00	-5.73	-39.90	-34.31	-0.80
Millet	Titao, Retail, XOF/KG	545.00	7.50	25.87	28.54	114.57
NPK	National, XOF/kg***	500.00	0.00	-28.57	-18.37	
Urea	National, XOF/kg***	500.00	0.00	-28.57	-18.37	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Cote d'Ivoire

Generally, maize and rice prices in Cote d'Ivoire show mixed results, although the prices of maize show more downward trends. For instance, maize price declined against its levels 3-12 months ago in Korhogo, declining the most by 36% against the 6-month levels. In Man, maize prices were lower than those recorded 1 - 6 months ago. Maize prices, however, rose in Korhogo by 12.24% over the previous month, and by 15.02% in Man over the previous year's level. On the other hand, the prices of rice remained largely elevated. The only exceptions were the prices of imported rice, which was lower than the 3-month levels in Man, while in Korhogo, the price of local rice declined against its 1-month and 6-month levels by 2.67% and 5.98%, respectively. These trends generally reflect the impact of the seasonality dynamics as well as the impact of global economic dynamics.

Table 18: Changes in prices in Cote d'Ivoire[50]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Korhogo, Retail, XOF/KG*	220.00	12.24	-4.35	-36.00	-6.13
Maize (white)	Man, Retail, XOF/KG	300.50	-0.45	-3.84	-14.14	15.02
Rice (denikassia imported)	Man, XOF/KG	446.67	1.43	-0.74	6.20	5.10
Rice (Local)	Korhogo, Retail, XOF/KG*	456.25	-2.67	14.06	-5.98	0.69
Rice (Local)	Man, Retail, XOF/KG	533.33	9.19	6.67	13.33	16.58

*Note: Last price is for January 2023, *February, **December, and ***November*

[49] Author's construction based on data from WFP (2023) and FAO (2023).
[50] Author's construction based on data from WFP (2023) and FAO (2023)

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

Ghana

Generally, food commodity prices remain well above their 3-12-month levels in most monitored markets in Ghana, except for rice in Accra and Bolga compared to the 3-month levels. The prices recorded in January, however, generally showed stability or declines against those of December 2022, although maize prices rose by 12.06% and 55.01% in Accra and Kumasi, respectively. On the other hand, the price of imported rice remained unchanged in Accra, Kumasi, and Techiman but declined by almost 30% in Bolga. The recent drop or stability in prices may be as a result of second season harvests in December to January as well as the appreciation of the local currency against the dollar over the December-January period. The prices of all types of fertilizer, however, showed mixed results. While the current (January) prices of both NPK and urea dropped against their levels 1 and 6-months ago, they remained elevated above the figures of 3 months ago.

Table 19: Changes in prices in Ghana[51]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Accra, Wholesale, GHS/100KG	6.46	12.06	41.67	13.33	59.11
Maize (white)	Bolga, Wholesale, GHS/100KG	5.65	-7.53	29.89	52.29	72.26
Maize (white)	Kumasi, Wholesale, GHS/100KG	9.13	55.01	72.26	73.24	124.88
Maize (white)	Techiman, Wholesale, GHS/100KG	4.75	0.00	46.60	25.33	81.99
NPK 20-10-10	National, USD/50kg	35.03	-3.76	4.10	-26.90	
NPK 23-10-5	National, USD per ton	40.06	2.98	12.94	-16.89	
Rice (imported)	Accra, Wholesale, GHS/100KG	10.00	0.00	0.00	36.43	76.37
Rice (imported)	Bolga, Wholesale, GHS/100KG	8.73	-29.94	-41.41	42.18	50.78
Rice (imported)	Kumasi, Wholesale, GHS/100KG	9.53	0.00	8.30	58.83	58.83
Rice (imported)	Techiman, Wholesale, GHS/100KG	12.51	0.00	6.74	27.01	77.95
Urea	National, USD/50kg	47.91	-2.04	10.47	-16.15	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Mali

Overall, food commodity prices have registered declines over the past 1-6 months in most monitored markets in Mali. Imported rice and sorghum, particularly, have registered significant drops in prices ranging from stability in some markets to as high as a 41% drop in some markets, although some markets such as Gao and Mopti recorded increases in prices against their 6-month and 1-month levels, respectively. Bamako (millet & rice), Segou (millet), and Kayes (rice), are the only markets that registered price surges higher than their past 1-12 months. For rice prices particularly, Bamako recorded a 16% to almost 18% rise, and Kayes reported a 17% - 24% rise above the past 1-12 months. All prices recorded in January are higher than their one-year levels for all commodities in all monitored markets. Despite food availability through harvests, insecurity, and droughts in parts of the country continue to reduce area cultivated and preventing full recovery from high prices.[52]

Table 20: Changes in prices in Mali[53]

[51] Author's construction based on data from WFP (2022) and FAO (2022)
[52] https://fews.net/west-africa/mali
[53] Author's construction based on data from WFP (2023) and FAO (2023)

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Millet	Bamako, Wholesale, XOF/100 kg	46,000.00	2.22	2.22	12.20	12.20
Millet	Gao, Wholesale, XOF/100 kg	45,000.00	-10.00	-10.00	4.65	5.88
Millet	Kayes, Wholesale, XOF/100 kg	50,000.00	0.00	6.38	13.64	19.05
Millet	Mopti, Wholesale, XOF/100 kg	45,000.00	-5.26	-5.26	12.50	20.00
Millet	Ségou, Wholesale, XOF/100 kg	46,000.00	6.98	9.52	15.00	22.67
Millet	Sikasso, Wholesale, XOF/100 kg	45,000.00	0.00	7.14	12.50	18.42
Millet	Tombouctou, Wholesale, XOF/100 kg	45,000.00	-10.00	-10.00	1.12	12.50
Rice	Bamako, Wholesale, XOF/100 kg	43,000.00	16.22	16.22	10.26	17.81
Rice	Gao, Wholesale, XOF/100 kg	42,000.00	0.00	-2.33	15.07	12.00
Rice	Kayes, Wholesale, XOF/100 kg	40,500.00	17.39	17.39	12.50	24.62
Rice	Mopti, Wholesale, XOF/100 kg	40,000.00	0.00	0.00	2.56	2.56
Rice	Ségou, Wholesale, XOF/100 kg	22,500.00	7.14	-37.50	-21.05	25.00
Rice	Sikasso, Wholesale, XOF/100 kg	42,000.00	0.00	-1.18	5.00	13.51
Rice	Tombouctou, Wholesale, XOF/100 kg	35,000.00	0.00	-22.22	-20.45	40.00
Rice (imported)	Bamako,Wholesale, XOF/100 kg	22,500.00	0.00	-35.71	-32.84	9.76
Rice (imported)	Gao, Wholesale, XOF/100 kg	40,000.00		-10.11	17.65	
Rice (imported)	Kayes, Wholesale, XOF/100 kg	28,000.00	-15.15	-25.33	-24.32	16.67
Rice (imported)	Mopti, Wholesale, XOF/100 kg	22,000.00	4.76	-41.33	-33.33	2.33
Rice (imported)	Sikasso, Wholesale, XOF/100 kg	22,000.00	-37.14	-38.89	-24.14	10.00
Sorghum	Bamako, Wholesale, XOF/100 kg	35,000.00	0.00	-20.45	-17.65	27.27
Sorghum	Gao, Wholesale, XOF/100 kg	35,000.00	-18.60	-6.67	0.00	34.62
Sorghum	Kayes, Wholesale, XOF/100 kg	26,500.00	-1.85	-33.75	-29.33	10.42
Sorghum	Mopti, Wholesale, XOF/100 kg	24,000.00	0.00	-37.66	-36.00	33.33
Sorghum	Ségou, Wholesale, XOF/100 kg	25,000.00	-41.18	-41.18	-37.50	8.70
Sorghum	Sikasso, Wholesale, XOF/100 kg	35,000.00	0.00	-22.22	-19.54	20.69

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Niger

Table 21 below presents changes in prices in Niger over the last one year. The table shows that prices recorded in January 2023 are higher than they were in December 2022, except in Katako, where maize price declined by 19.68%, and in Abalak, where millet price declined 15.84%. The prices of sorghum experienced the most upward pressure, increasing by 49.45% in Goure, followed by Bonkaney at 34.25%. The current prices of food commodities are, however, overwhelmingly lower than they were 3 and 6 months ago in all monitored markets. Compared to their one-year levels, maize price remained higher in Abalak and Goure, but declined in Katako, millet experienced low increases (less than 5%) in most monitored markets except in Abalak, where there was a decline. The prices of sorghum were generally lower or stable except in Katako, where it increased by 5.26%. Insecurity, reduced stocks due to the lean season, and the disruption of trade from Burkina Faso, Mali, and Nigeria due to disagreement over currency of payment, are worsening the prices of food commodities.[54] However, food assistance, which is estimated to have reached at least 75% of the households, has had some dampening effect on the prices in some markets.[55]

[54] FEWSNET, 2023. https://fews.net/west-africa/niger
[55] Ibid

Table 21: Changes in prices in Niger[56]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize	Abalak, Retail, XOF/KG	333.00	3.58	-7.24	-19.37	18.51
Maize	Goure, Retail, XOF/KG	319.00	19.92	-13.32	-12.60	8.14
Maize	Katako, Retail, XOF/KG	253.00	-19.68	-9.96	-18.91	-1.94
Millet	Abalak, Retail, XOF/KG	324.00	-15.84	-7.43	-22.30	-1.52
Millet	Bonkaney, Retail, XOF/KG	296.00	30.40	-12.94	-10.30	4.59
Millet	Goure, Retail, XOF/KG	303.00	8.60	-14.89	-14.41	2.36
Millet	Katako, Retail, XOF/KG	298.00	11.19	-14.12	-11.57	3.47
Sorghum	Abalak, Retail, XOF/KG	271.00	0.37	-3.90	-20.06	-14.78
Sorghum	Bonkaney, Retail, XOF/KG	294.00	34.25	-7.55	-5.77	0.00
Sorghum	Goure, Retail, XOF/KG	272.00	49.45	-21.39	-11.11	-1.09
Sorghum	Katako, Retail, XOF/KG	300.00	9.09	-7.12	-6.25	5.26

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Nigeria

Changes in the prices of food commodities in Nigeria show mixed results but improvements in prices are seen in terms of declines or low increases over the past one month. Compared to December 2022, more declines in prices are seen in most markets for maize, millet, and sorghum than the prices of rice of all types. Maize prices declined the most in Giwa and Kano, while Ibadan had the largest increase of between 14% and 18%. The second season harvest of maize in December and January, and carryover stocks of sorghum harvests from September to November may be responsible for the price taming. For the two types of rice, prices are only lower in Ibadan and Kaura Namoda. Similarly, compared to the past 3-12 months, all the two types of rice remain significantly above their previous levels, with Lagos registering the most increase of between 29% and 52%. Sorghum had the most reductions in prices across all comparable periods, declining between 19% and 26% in Ibadan compared to 3 - 12 months, but having a significant 87.5% increase between December 2022 and January 2023. Lagos also recorded an increase in the price of sorghum over the past 3 - 12 months. Conflicts and insecurity, high demand, low supply, and high fuel prices, coupled with poor macroeconomic conditions are exacerbating the high prices.

The prices of NPK and urea fertilizers have declined compared to the past 1 - 6 months, with the price of urea dropping by 7.14% against its level 6 months ago.

Table 22: Changes in prices in Nigeria[57]

[56] Author's construction based on data from WFP (2023) and FAO (2023)
[57] Author's construction based on data from WFP (2023) and FAO (2023)

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Giwa, NGN/Kg	182.50	-10.98	-7.59	-3.44	-8.57
Maize (white)	Ibadan, NGN/Kg	260.00	14.04	18.18	3.17	
Maize (white)	Kano, NGN/Kg	219.18	-3.51	-4.36	-2.82	1.24
Maize (white)	Kaura Namoda, NGN/Kg	219.35	-1.44	7.26	1.85	10.69
Maize (white)	Lagos, NGN/Kg	245.75	2.40	5.81	-2.87	6.85
Maize (white)	Maiduguri, NGN/Kg	210.00	2.94	1.82	2.94	7.80
Millet	Giwa, NGN/Kg	225.00	-9.64	-16.67	-7.02	-3.85
Millet	Ibadan, NGN/Kg	291.50	-0.17	-0.17	10.42	11.26
Millet	Kano, NGN/Kg	249.18	-2.41	13.73	-3.25	15.04
Millet	Kaura Namoda, NGN/Kg	242.20	-2.53	18.90	6.62	5.14
Millet	Lagos, NGN/Kg	286.00	2.58	11.28	6.72	7.92
Millet	Maiduguri, NGN/Kg	237.50	6.03	7.95	-2.66	12.03
NPK 15 15 15	National, USD per ton	46.12	-2.43	-0.09	-1.50	
NPK 20 10 10	National, USD per ton	52.78	-1.49	-1.53	-6.42	
Rice (imported)	Giwa, NGN/Kg	780.00	3.72	17.74	36.84	42.86
Rice (imported)	Ibadan, NGN/Kg	710.00	-2.85	13.69	23.09	38.67
Rice (imported)	Kaura Namoda, NGN/Kg	668.80	-0.10	0.09	19.04	26.11
Rice (imported)	Lagos, NGN/Kg	881.00	2.54	29.85	42.65	52.74
Rice (imported)	Maiduguri, NGN/Kg	855.00	1.79	14.38	40.63	36.15
Rice (milled)	Giwa, NGN/Kg	1,095.00	1.01	-8.75	5.29	24.43
Rice (milled)	Kano, NGN/Kg	614.10	3.91	5.15	15.60	39.89
Rice (milled)	Kaura Namoda, NGN/Kg	1,038.00	-1.24	6.90	15.54	31.43
Rice (milled)	Maiduguri, NGN/Kg	1,095.00	1.77	2.82	9.50	34.85
Sorghum (white)	Giwa, NGN/Kg	175.00	-11.62	-12.50	-10.71	-5.41
Sorghum (white)	Ibadan, NGN/Kg	210.00	87.50	-19.85	-26.06	-19.85
Sorghum (white)	Kano, NGN/Kg	204.52	-13.02	-19.54	-13.39	3.21
Sorghum (white)	Kaura Namoda, NGN/Kg	230.50	-5.05	-6.00	-0.60	-4.52
Sorghum (white)	Lagos, NGN/Kg	283.00	0.00	2.26	6.95	17.14
Sorghum (white)	Maiduguri, NGN/Kg	192.50	-3.75	-2.53	-4.89	-0.77
Urea	National, USD per ton**	57.23	-1.72	-2.49	-7.14	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Togo

Overall, food commodity prices are stable, have declined or have had moderate increases of less than 15% (table 23). The most increase in prices is seen for sorghum in Korbongou at 14.9%, followed by Amegnran and Lomé at 11.74% and 10.33% respectively for maize compared to the previous month. On the flipside, the most significant drop in prices is seen for maize in Lomé at 23.71% over its one-year level. Apart from these, maize prices have generally risen in January compared to December 2022, except in Cinkasse and Korbongou, while the price of imported rice also rose in Amegnran and Korbongou. Compared to a year ago, maize prices are generally lower except in Cinkasse, while sorghum prices are mostly higher except in Anie and Kara. The second season harvests of maize in December and January, and carryover stocks of sorghum from the previous seasons continue to tame the prices of these products.

For fertilizer, the prices of NPK and urea in Togo are stable compared to the past 1-6 months levels.

Table 23: Changes in sorghum prices in Togo[58]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava (gari)	Amegnran, XOF/Kg	300.00	0.00	0.00	0.00	9.09
Cassava (gari)	Anie, XOF/Kg	300.00	0.00	0.00	0.00	-16.67
Cassava (gari)	Cinkassé, XOF/Kg	434.00	1.38	1.38	-5.38	0.00
Cassava (gari)	Kara, XOF/Kg	410.00	0.00	-4.43	9.33	3.02
Cassava (gari)	Korbongou, XOF/Kg	434.00	0.00	0.00	-5.65	0.00
Cassava (gari)	Lomé, XOF/Kg	435.00	-2.30	-2.30	6.25	7.32
Maize (white)	Amegnran, XOF/Kg	230.00	11.74	-1.15	-11.38	-13.47
Maize (white)	Anie, XOF/Kg	211.00	4.27	4.76	-8.33	-12.00
Maize (white)	Cinkassé, XOF/Kg	256.00	-1.56	0.80	-3.08	4.13
Maize (white)	Kara, XOF/Kg	238.00	5.88	-2.70	-10.00	-6.32
Maize (white)	Korbongou, XOF/Kg	255.00	-1.96	-3.10	-3.85	0.00
Maize (white)	Lomé, XOF/Kg	242.00	10.33	2.69	-7.93	-23.71
NPK 15 15 15	National, USD per ton	18,000.00	0.00	0.00	0.00	
Rice (imported)	Amegnran, XOF/Kg	540.00	3.70	-0.18	1.82	0.00
Rice (imported)	Anie, XOF/Kg	460.00	0.00	-0.43	0.00	0.00
Rice (imported)	Cinkassé, XOF/Kg	460.00	0.00	-0.43	-1.08	0.00
Rice (imported)	Kara, XOF/Kg	460.00	0.00	-1.08	0.00	-2.13
Rice (imported)	Korbongou, XOF/Kg	480.00	4.17	9.17	2.04	0.00
Rice (imported)	Lomé, XOF/Kg	460.00	0.00	0.00	0.00	0.00
Sorghum	Anie, XOF/Kg	265.00	0.00	-5.02	-5.36	-10.77
Sorghum	Cinkassé, XOF/Kg	270.00	-7.41	-13.79	-16.67	6.38
Sorghum	Kara, XOF/Kg	298.00	-7.38	-8.00	-16.36	0.00
Sorghum	Korbongou, XOF/Kg	280.00	-6.67	-6.67	-3.45	14.29
Sorghum	Lomé, XOF/Kg	340.00	0.00	-2.58	6.25	7.94
Urea	National, USD per ton	18,000.00	0.00	0.00	0.00	

*Note: Last price is for January 2023, *February, **December, and ***November*

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

Seasonal Monitor and Crop Yield Forecasts

In **Mali**, the harvesting of horticulture crops and the establishment of rice nurseries is underway. Production is, however, expected to be below-average due to declines in cultivated areas because of the conflicts in the northern areas of Segou and Liptako Gourma.[59] In **Nigeria**, dry season cultivation is underway along the major river flood plains. However, the April/May harvest is expected to be below-average due to high input prices, restricted access to fertilizer, and low household purchasing power, coupled with reduced access to farmland in conflict-affected areas.[60]

[58] Author's construction based on data from WFP (2023) and FAO (2022)
[59] https://fews.net/west-africa/mali
[60] https://reliefweb.int/report/nigeria/nigeria-key-message-update-persisting-conflict-and-heightened-tension-ahead-election-drive-high-food-assistance-needs-january-2023

Continental Food Trade Updates

The following are some of the major events and activities during February 2023, which have had an impact on food trade across the continent:

- The African Development Bank (AfDB), Africa Investment Forum, and AfricaGlobal Schaffer launched the Africa-USA Now, a new weekly video podcast that spotlights current events at the intersection of Africa and the United States. According to the AfDB president, the program will address roadblocks to engagement, highlight significant trade and investment opportunities, and hopefully change the narrative on Africa, and the dynamic changes taking place on the continent.

East Africa Food Trade Updates

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

- A study on discriminative taxes in the East African Community shows that Kenya, Uganda, Rwanda, and Tanzania may be denying smaller EAC economies a chance at regional trade by levying irregular excise duty. The affected countries include Burundi and South Sudan.[61]
- The Kenyan President announced that the EAC-COMESA-SADC tripartite agreement, under which 28 countries will trade as a bloc with European Union, will be in place by the end of April 2023.[62]
- The capacity building of stakeholders playing a key role in the implementation of the Tripartite Free Trade Area (TFTA) kicked off with the first regional Training of Trainers session on the TFTA Rules of Origin, hosted in Nairobi, Kenya on 17–18 February 2023. The initial focus is on the Rules of Origin and thus targets the business community, revenue authorities' customs services departments, government ministries and agencies and organizations that support trade to enhance their skills and knowledge on TFTA Rules of Origin.[63]
- COMESA, the East African Community, and the Southern Africa Development Community reported that 716 out of 796 (88.9%) of NTBs registered in the online reporting system[64] implemented by the three regional economic communities, have been resolved. The main NTBs include restrictive licensing, permitting, and other requirements applied at the border. Barriers behind the border, such as unwarranted technical barriers to trade and sanitary and phytosanitary measures are equally prevalent.[65]

61 https://www.the-star.co.ke/business/kenya/2023-02-21-eac-comesa-sadc-tripartite-trade-deal-in-place-by-april-ruto-says/
62 https://www.the-star.co.ke/business/kenya/2023-02-21-eac-comesa-sadc-tripartite-trade-deal-in-place-by-april-ruto-says/
63 https://www.comesa.int/capacity-building-for-the-implementation-of-the-tripartite-free-trade-area-get-underway/
64 www.tradebarriers.org
65 https://www.comesa.int/close-to-90-of-non-tariff-barriers-reported-in-the-tripartite-region-have-been-resolved/

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.

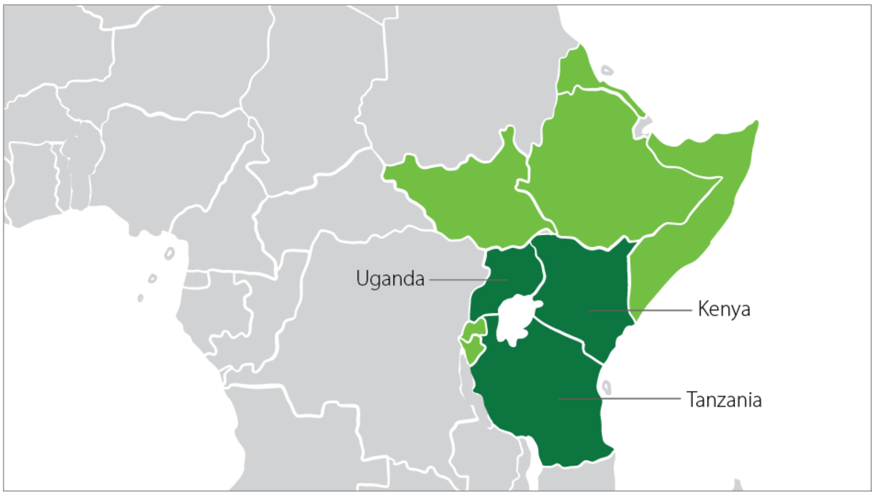

Figure 7: East Africa Cross border trade updates February 2023[66]

TANZANIA

- The Deputy Minister for Foreign Affairs and East African Cooperation stressed that trade barriers between Tanzania and the Democratic Republic of Congo (DRC) have no relations with the country's withdrawal of its membership from COMESA.
- Despite adopting measures to combat illicit financial flows (IFFs), Tanzania loses an estimated $1.5 billion annually in revenue to trade-based money laundering (TBML), a deprivation of the country's much-needed tax revenues.
- The Deputy Permanent Secretary of the Ministry of Investment, Industry and Trade announced that the Ministry has rolled out awareness campaigns for businesses interested to import intermediary inputs or exporting products to the continent through the AfCFTA Guided Trade Initiative.

UGANDA

- The Private Sector Foundation Uganda (PSFU) in partnership with Ministries of Foreign Affairs, Trade and Cooperatives, Privatisation and Investment etc. organized the Uganda – South Africa Trade, Tourism, and Investment Summit to take place on February 27th – 1st March 2023 in Pretoria, South Africa. The summit will provide a platform for the Private sector, companies, and businesses to create new markets and ways of how to facilitate doing business and identify existing and emerging business or investment opportunities in Uganda and South Africa.
- Latest Bank of Uganda trading data shows that exports, which had stagnated in single-digit millions of dollars between January and September 2022, grew to an average of $20 million monthly between October-December.

KENYA

- Sugar millers have been locked out of the multi-billion-shilling duty-free sugar imports window. The move by the Sugar Directorate is based on the 2017 occurrence where millers abandoned buying and processing sugarcane from farmers after they were allowed to bring in the commodity outside of the Common Market for Eastern and Southern Africa (COMESA) without paying duty.
- The Interior Cabinet Secretary announced that plans for the reopening of the Kenya-Somalia border in Mandera are nearing conclusion, with the renovation of the Customs Border Control Point set to begin soon.
- The Ministry of Agriculture is yet to gazette the names of the millers and traders allowed to ship in maize as the window for duty-free imports opens.
- The Kenya Ports Authority (KPA) has moved its cargo handling services to the government portal e-Citizen to comply with the current administration's target of going paperless in its transactions.
- The European Union signed a $27 million funding for TradeMark Africa to facilitate a five-year programme that will boost Kenya's exports and support the government in creating a conducive business environment.
- Kenya and Uganda have initiated talks for the opening of a One-Stop Border Post in Lokiriama in northwest Kenya to boost trade and open up the far-flung area, the Interior Ministry said.

[66] https://www.theafricareport.com/281263/kenya-ruto-reverses-ban-on-ugandan-agricultural-produce/
https://www.capitalfm.co.ke/news/2023/02/govt-to-reopen-kenya-somalia-border-in-mandera/
https://www.businessdailyafrica.com/bd/markets/commodities/names-of-duty-free-maize-importers-remain-unknown--4115540
https://dailynews.co.tz/comesa-withdrawal-has-not-affected-tz-drc-trade-relations/
https://www.thecitizen.co.tz/tanzania/news/national/tanzania-loses-sh3-3-trillion-annually-to-illicit-trade-4119948
https://eabc-online.com/tanzania-ready-to-trade-under-afcfta-guided-trade-initiative/
https://www.busiweek.com/uganda-south-africa-business-summit-2023/
https://www.theeastafrican.co.ke/tea/business/ugandan-exports-to-rwanda-flourish-4119790
https://www.thecitizen.co.tz/tanzania/news/east-africa-news/uganda-wants-stern-laws-against-east-africa-trade-barriers-4133026

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 the Southern African region:

- The Southern African Development Community (SADC)'s Payment Systems Subcommittee under the SADC Committee of Central Bank Governors (CCBG) convened its annual regional conference in Windhoek, Namibia, on 13th and 14th February 2023 to deliberate on the developments in the regional payment systems ecosystem, and most importantly the impact of digitisation on initiatives to enhance financial inclusion and integrity[67]

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 February 2023[68]

ZAMBIA

- Zambia, together with Angola and Democratic Republic of Congo (DRC), have agreed to establish a new agency that will oversee the development and joint management of a trade corridor to and from the Atlantic Ocean port of Lobito, which could mean lost business for South African ports.

ZIMBABWE

- ZimTrade is working to capacitate thousands of smallholder horticulture farmers in the Masvingo Province, helping them unlock the province's estimated US$386 million export potential. The initiatives also involve reviving fruit plantations in the province with the capacity to generate hundreds of millions of US dollars from exports.

[67] https://www.sadc.int/latest-news/sadc-convenes-payment-systems-annual-regional-conference
[68] https://www.tralac.org/news/article/15906-tralac-daily-news-2-february-2023.html
https://www.herald.co.zw/zimtrade-to-capacitate-smallholder-horticulture-farmers/

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 the West African region:

- The ECOWAS Bank for Investment and Development (EBID) has announced a dual-currency trade finance credit line totalling around $130million, marking the first time it has secured funding support from the African Development Bank (AfDB). The AfDB is providing $50million and €50million to the three-and-a-half-year facility, while the People's Bank of China is providing a further US$30million through the Africa Growing Together Fund – a facility sponsored by the Chinese central bank, but administered by the AfDB[69]

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 Feb 2023[70]

NIGERIA

- The Manufacturers Association of Nigeria (MAN) has stressed that implementing the AfCFTA agreement without concluding some of its critical elements, particularly the determination of the Rule of Origin (RoO), will hurt manufacturers and the economy.
- Nigerian authorities have hailed the launch of a deepwater seaport in Lagos they say will create 300,000 jobs and reduce shipping bottlenecks
- To boost access to finance for smaller businesses in Nigeria and to support increased trade, the IFC announced a partnership with Union Bank of Nigeria Plc to help the bank expand lending to hundreds of businesses operating in critical sectors in the country, including food, healthcare, manufacturing, and services.
- Nigeria and the Republic of Niger signed a bilateral agreement for the coordination of frequency utilization to ensure seamless deployment of services along their borders

GHANA

- The Ghana-EU Agribusiness Platform, an online platform that will directly link Ghanaian Agribusinesses to their counterparts in the European Union (EU) markets, was launched in Accra.
- The Ministry of Trade and Industry is warning of the possibility of Small and Medium Scale Enterprises (SME) without Ghana Standards Authority's certification losing out on the African Continental Free Trade Area deals.

69 https://leadership.ng/ebid-announces-130m-facility-to-bridge-w-africas-trade-financing-gap/
70 https://northafricapost.com/64937-angola-drc-and-zambia-move-towards-jointly-managing-key-trade-corridor.html
https://www.myjoyonline.com/smes-without-certification-could-lose-out-on-acfta-benefits-trade-ministry-warns/
https://thenationonlineng.net/obscure-rules-may-hurt-nigerias-gains-from-afcfta/
https://www.voanews.com/a/with-new-deep-sea-port-nigeria-s-focus-turns-to-better-road-rail-connections/6935493.html
https://radionigeria.gov.ng/2023/02/06/nigeria-niger-sign-border-frequency-agreement/
https://africa.businessinsider.com/local/markets/egypt-and-nigeria-have-decided-on-some-trade-agreements/p7nmpxz

The digital Regional Food Balance Sheet provides near real-time estimates and projections for core staple crop production, stock levels, and other information in East and Southern Africa.

For more information,
please visit **www.rfbsa.com**.

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