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The monthly Food Security Monitor is a critical tool for stakeholders across the African agricultural landscape. This report equips policymakers, practitioners, and the wider community with vital insights to navigate challenges, prioritize interventions, and ultimately build a more food-secure future for all. This 45th edition provides an overview of the food security situation and market prices across East, South, and West Africa.

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Summary

Our monthly Food Security Monitor is one way AGRA makes data available to key stakeholders to underpin evidence-based decision-making. Highlights from March 2024 Food Security Monitor are summarised below:

Food Security Updates

Zambia, Malawi, and Zimbabwe have declared state of disaster over the impact of the prolonged El Niño driven dry spell and heat wave which had hit most of Southern Africa. In Zambia, the El Niño driven drought has impacted 86 out of the country's 116 districts, affecting more than a million farming households translating into 6.6 million people. In Malawi, the El Niño induced conditions such as inadequate rains, floods, and prolonged dry spells have also led to severe crops damage and affected food production in 23 of the 28 districts impacting at least 2 million households. Zimbabwe has also reported that the El Niño-induced drought has resulted in more than 80% of the country receiving below normal rainfall and damaging 12% of planted farmland corn.

In **Eastern Africa**, despite improved supplies of food from major producers such as Uganda, Tanzania, and Kenya, food and nutrition security concerns remain driven by conflict, inflation, disease outbreaks and poor access to nutritious diets and safe water. Overall, 58.2 million people in Eastern Africa are food-insecure, with hotspot countries being DRC (23.4 million), Sudan (17.7 million), Ethiopia (15.8 million), and South Sudan (5.7 million), according to the latest (March 2024) Food Security and Nutrition Working Group (FSNWG) situation in East Africa report.

In **West Africa**, high food insecurity remains a concern with the Sahelian countries (Burkina Faso, Mali, and Niger) and Nigeria being the main hotspots. As of 31st March 2024, 158.5 million people across seven selected West African countries had insufficient food for consumption, an increase of 300,000 people over the previous month's level.

Global cereal prices remain generally low with a fall in the International Grain Council's (IGC) Grain and Oil Index (GOI) by 20% as well as a fall in sub-indices such as wheat, maize, and barley, except rice, compared to a year ago. However, compared to February, both the FAO Food Price Index (FFPI) and GOI in March show a low decline of 1.1% and 1.9% respectively.

Food Trade Updates

- The African Union has adopted the African Continental Free Trade Area (AfCFTA) Protocol on Women and Youth in Trade as well as Protocols on Investment and on Digital Trade.
- The Afreximbank officially launched the Fund for Export Development in Africa (FEDA) in Kigali, on March 20 2024, to tackle Africa's \$110 billion financing gap for intra-African trade, value-added export development, and industrialization value chains. Rwanda became the first among 15 African nations to ratify its establishment agreement and is now hosting the \$1 billion AfCFTA Adjustment Fund managed by FEDA.

Food Commodity Prices Updates

In **East Africa**, cereal prices are generally lower than they were in the past 1-12 months in most countries due to increased supplies from December/January harvests. However, the price of wheat remains generally elevated compared to similar periods. In **Southern Africa**, the prices of monitored commodities (maize and rice) remain overall elevated above previous 1-12 months levels. However, maize prices in Malawi and Mozambique show decline against the past 1 month as new harvests (particularly green harvests) begin to trickle-in. Also, the price of rice in all selected markets of Mozambique and some markets in Malawi remain unchanged against the previous month's level. In **West Africa**, the prices of select food commodities remained largely elevated. However, the prices of maize and rice remain largely lower in Ghana, while Togo has also registered lower prices for sorghum, compared to the past 1-12 months.

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 (Table 1 and Figure 1) offers a concise overview of fluctuations in the number of people experiencing Insufficient Food Consumption (IFC)¹, snapshots of hunger hotspots, and average changes in food prices² over the past two years. Figure 1 displays the prevalence of IFC in March 2024 across 17 countries selected from East, Southern, and West Africa. During this month, Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%) with Nigeria (49.5%) remain the food insecurity hotspots (defined as countries where over 50% of the total population has IFC), with Nigeria (49.5%) inching towards a hotspot. The number of people with IFC over the past month remained unchanged in most countries except in Cote d'Ivoire, Uganda, and Zimbabwe where it surged upward, and in Ghana where it declined. However, compared to the same period last year, the number of people with IFC increased in Cote d'Ivoire, Kenya, Mozambique, Niger, Nigeria, Zambia, and Zimbabwe, while it declined in the remaining countries.

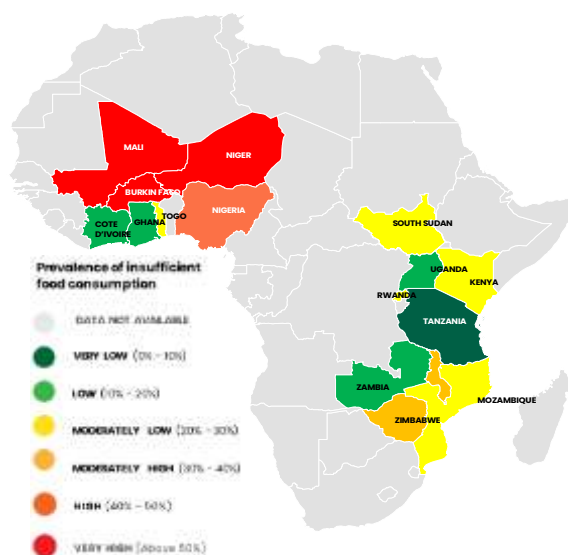
On the other hand, the national average maize prices, compared to the past six months declined in most countries, except in Malawi, Mozambique, Nigeria, South Sudan, Zambia, and Zimbabwe. Both Burkina Faso and Mali experienced decline in their national average price of millet compared to the past 6 and 12 months.

Table 1: Insufficient Food Consumption and Commodities Price Changes

Country	Change (%) in people with insufficient food consumption from last 1 Month	Change (%) in people with insufficient food consumption from last 1 year	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	0.00	-11.11	-7.03	-5.52
Cote d'Ivoire	8.51	24.39		
Ethiopia			-15.80	22.00
Ghana	-1.85	-41.11	-58.96	-65.29
Kenya	0.00	29.52	-24.74	-36.96
Malawi	0.00	-13.92	16.71	31.14
Mali ²	0.00	-5.71	-4.16	-6.02
Mozambique	0.00	46.15	29.86	22.03
Niger	0.00	12.04	-5.37	17.80
Nigeria	0.00	53.99	94.98	39.32
Rwanda	0.00	-13.33	-32.56	-19.93
South Sudan	0.00	-52.24	2.72	48.53
Tanzania	0.00	-10.34	-26.55	-41.57
Togo	0.00	-29.63	-5.33	1.11
Uganda	3.75	-49.08	-32.64	-26.56
Zambia	0.00	32.00	59.13	76.74
Zimbabwe	7.84	27.91	184.65	1,521.47

Key: No Change = increase = decrease

Figure 1: Hunger Hotspots Snapshot, March 2024



¹ People with insufficient food consumption (IFC) 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 over 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 do not consume 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 consume 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).

² Maize is the main commodity being tracked on this dashboard, except in Mali and Burkina Faso, 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.

Global Market Update

The FAO Food Price Index (FFPI) (Figure 2) saw a 1.1% uptick in March from February, driven by Increase in price indices for vegetable oils, dairy products and meat and slightly more than offset by decreases in those for sugar and cereals.³ Decline in cereal prices are driven by continued strong export competition among the European Union, the Russian Federation and the United States of America as well as subdued global import demand. The International Grain Council's (IGC) Grain and Oil Index (GOI) (Table 2) has increased by 1.99% compared to the previous month but declined by 20.38% compared to the past one year, driven by a decline in the sub-indices of wheat (23.72%), maize (34.74%), soyabeans (20.65%) and barley (26.83%). Only rice saw an increase in its index by 27.30% over the past one year.

Figure 2: FAO Food Price Index (FFPI)⁵

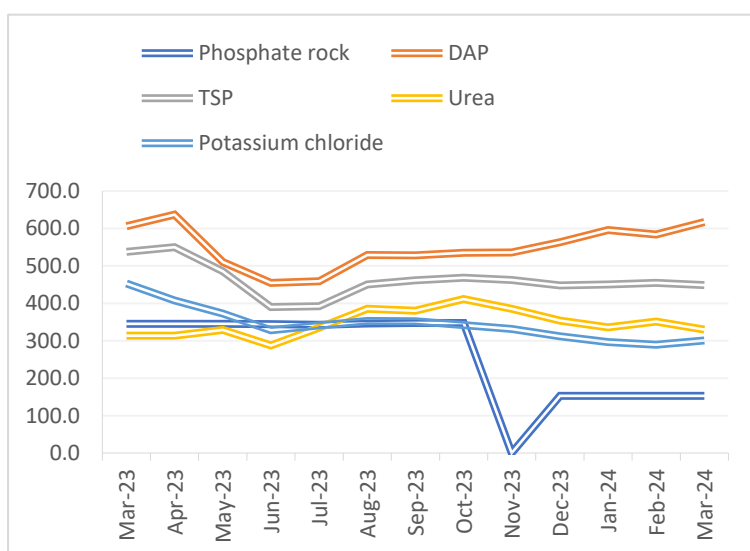


Table 2: IGC GOI Commodity Price Indices⁶

	Jan 2000 = 100	27-March	% Change 1M	% Change 1Y
GOI		226.51	1.99	-20.38
Wheat		198.24	-4.13	-23.72
Maize		195.32	3.66	-34.74
Rice		250.49	-2.79	27.30
Soya Beans		222.50	6.29	-20.65
Barley		205.85	-0.92	-26.83

Global Fertiliser Prices

Figure 3: Global Fertiliser Prices (\$/ton)



Mixed trends are observed in international Fertiliser prices as shown in Figure 3. Whereas DAP and potassium have seen a moderate uptick in prices by 5.8% and 3.8% respectively in March 2024, the price of urea has dropped by 66% compared to February 2024. Compared to the same period a year ago, however, phosphate, TSP, and potassium have had significant drops in prices by 55%, 16.5%, and 33.7% respectively.

Source: Author's construction based on World Bank data⁴

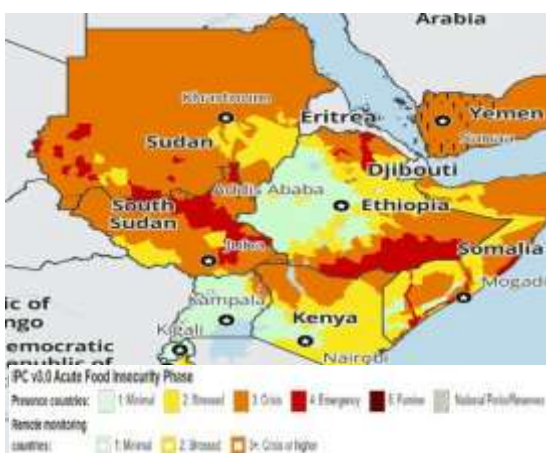
³ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁴ <https://www.worldbank.org/en/research/commodity-markets>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, November 2023 – January 2024



In Eastern Africa, conflict, inflation, disease outbreaks and poor access to nutritious diets and safe water continue to impact the state of food security and nutrition (WFP, March 2024). Overall, 58.2 million people in Eastern Africa are food-insecure, with hotspot countries being DRC (23.4 million), Sudan (17.7 million), Ethiopia (15.8 million people), and South Sudan (5.7 million), according to the latest (March 2024) Food Security and Nutrition Working Group (FSNWG) Situation in East Africa report. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persist in northern, central, southern, and eastern Ethiopia, with the areas of grave concern being Tigray, north-eastern Amhara, and western Afar where conflicts are most severe.

In Kenya: above-average 2023 October to December short rains, which resulted in 15-20% higher national crop production is supporting IPC Phase 2 & 3 outcomes across the country, while the forecast of above-average March to May 2024 long rains are expected to further support improvement in food security.⁵

In South Sudan: IPC Phase 4 outcomes persist as the lean season kicks-in and further worsened by a high influx of nearly 600,000 South Sudanese returnees and refugees from Sudan and 100,000 from Ethiopia by the end of February 2024.⁶

In Uganda: Crisis (IPC Phase 3) persists in Karamoja and refugee settlements, with the most vulnerable households likely facing Emergency (IPC Phase 4) due to depleted carryover stocks from the below-average 2023 harvests.⁷

Prevalence of insufficient food consumption

As of 31st March 2024, the number of people across five selected East African countries (see Table 3) who did not have sufficient food for consumption had increased by 300,000 people to 32.9 million, implying a deterioration of the food insecurity situation across these select countries, driven mainly by increase in Uganda. The current level of the number of people with insufficient food for consumption is, however, lower than in 2023 (42.3 million) and 2022 (35.7 million). Table 4 below provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries in March 2024.

Table 3: Prevalence of insufficient food consumption across selected East African countries (March 2024)⁸

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Kenya	51.40	13.60	13.60	26.46	0.00	29.52	74.36
Rwanda	12.30	2.60	2.60	21.14	0.00	-13.33	4.00
South Sudan	11.00	3.20	3.20	29.09	0.00	-52.24	-51.52
Tanzania	56.30	5.20	5.20	9.24	0.00	-10.34	10.64
Uganda	42.70	8.30	8.00	19.44	3.75	-49.08	-41.13

*Current month and **Previous month

● = No change; ↗ = Low increase (0-10%); ↕ = Moderate increase (10-30%); ↗ = High increase (>30%)

↘ = Low decrease (0-10%); ↘ = Moderate decrease (10-30%); ↘ = High decrease (>30%)

⁵ FEWSNET, February 2024 Food Security Outlook for Kenya.




⁶ <https://fews.net/east-africa/south-sudan>

⁷ <https://fews.net/east-africa/uganda>

⁸ Author's construction based on WFP HungerMap

Commodity Prices

Key drivers of commodity prices in EA⁹

	Conflicts	Conflicts and insecurity persist particularly in South Sudan and Ethiopia preventing price recovery from high levels despite ongoing harvests.
	Seasonal Dynamics	Seasonal harvests are increasing supplies in most markets and resulting in lower prices across the East African region. However, droughts and flooding have negatively impacted harvests and prevented price recovery in certain areas.
	Macroeconomic Shocks	Poor macroeconomic conditions, an influx of returned refugees, and localized poor harvests have particularly sustained higher prices in South Sudan.

Maize

Figure 5: National average price spreads for Maize across select East African Countries

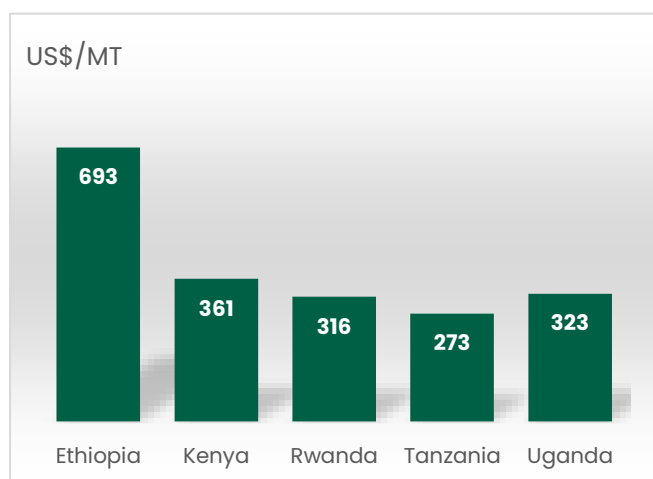


Figure 5 presents the national average price spreads for Maize across select East African Countries. This shows that the price of maize per ton in Ethiopia is double what it sells in other East African countries, with Tanzania being the cheapest source of maize US\$273 per ton in the region. As in Table 4, maize prices across the East African region remain mostly lower compared to the past 1-12 months. Significant declines have been observed in Kenya, Rwanda, Tanzania, and Uganda due to increased supplies from seasonal harvests across these countries. Compared to the past one year, however, Ethiopia and South Sudan have recorded 22% and 48.53% increases in maize prices due to multiple shocks of conflicts and climatic-related challenges.

Table 4: Percentage Changes in Maize Prices in East Africa¹⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg*	3,922.71	-6.04 ↓	-0.39 ↘	-15.80 ↓	22.00 ☒
Kenya	White Maize	National Average, Retail, KES/KG*	47.38	1.69 ▲	-67.82 ↓	-24.74 ↓	-36.98 ↓
Rwanda	Maize	National Average, Retail, RWF/Kg	401.64	-14.99 ↓	-30.76 ↓	-32.56 ↓	-19.93 ↓
Rwanda	Maize (flour)	National Average, Retail, RWF/Kg	896.65	-5.98 ↓	-8.47 ↓	-6.76 ↓	-6.63 ↓
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	778.90	1.41 ▲	1.21 ▲	2.72 ▲	48.53 ☒
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG*	70,000.00	-4.55 ↘	-18.03 ↓	-26.55 ↓	-41.57 ↓
Uganda	Maize (flour)	National Average, Retail, UGX/Kg**	2,675.26	-5.23 ↓	-12.42 ↓	-18.39 ↓	-17.07 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg**	1,249.54	-5.66 ↓	-17.54 ↓	-32.64 ↓	-26.56 ↓

Note: Last price is for February 2024, *March 2024, **January 2023, and ***December 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%)

⁹ Fewsnets, 2024

¹⁰ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) national MIS Ethiopia, Kenya & Tanzania

Rice

Figure 6: National average price spreads for Rice across select East African Countries

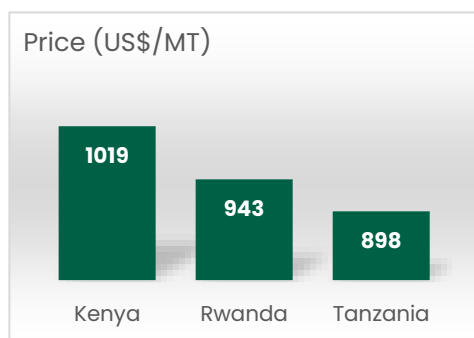


Figure 6 shows that the price of rice is most expensive in Kenya compared to Rwanda and Tanzania, with Tanzania being the cheapest at US\$898 per ton. From table 5, rice prices in the three monitored East African countries generally show declining trends with significant drops seen in Kenya and Tanzania at 19% and 21.98% respectively compared to the past one year. Although the national average price of rice in Rwanda remains generally stable, it is 17.38% above what it was 6 months ago.

Table 5: Percentage Changes in Rice prices in East Africa¹¹

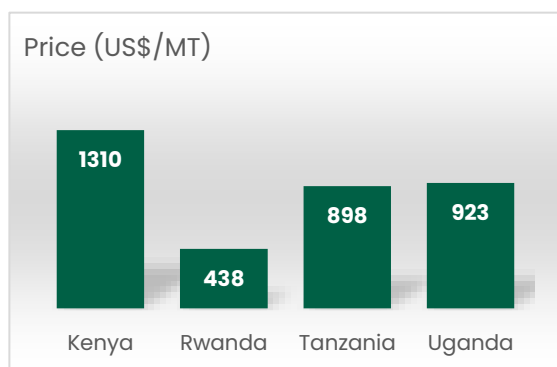
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG*	133.68	3.55 ▲	-6.21 ▼	-12.44 ▼	-19.00 ▼
Rwanda	Rice	National Average, Retail, RWF/Kg	1,200.00	0.00 ●	0.25 ▲	17.38 ✖	0.50 ▲
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG*	230,000.00	-2.82 ▼	-12.78 ▼	-10.89 ▼	-21.98 ▼

Note: Last price is for February 2024, *March 2024, **January 2023, and ***December 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%)

Beans

Figure 7: National average price spreads for Beans across select East African Countries



Kenya's beans (Yellow-Green) price, US\$1,310, is the highest in the region compared to Rwanda's US\$438/MT. The price spread between Tanzania and Uganda is quite minimal at only \$25/MT. Unlike maize prices, beans prices (Table 6) have had an upward surge compared to the past one month in Kenya and Rwanda. Compared to the past 3-12 months, however, the national average prices of beans are lower than they were in all the selected East African countries. Rwanda's beans prices have in particular been lower by 38.67%, 49.8%, and 51.95% than the past 3, 6, and 12 months respectively.

Table 6: Percentage Changes in Beans Prices in East Africa¹²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG*	171.98	6.72 ▲	-5.89 ▼	-6.31 ▼	-9.59 ▼
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG*	128.66	7.42 ▲	-9.73 ▼	-34.51 ▼	-14.22 ▼
Rwanda	Beans	National Average, Retail, RWF/Kg	556.77	2.19 ▲	-38.67 ▼	-49.80 ▼	-51.95 ▼
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG*	230,000.00	-8.00 ▼	-16.00 ▼	-11.57 ▼	-19.89 ▼
Uganda	Beans	National Average, Retail, UGX/Kg**	3,567.36	-2.52 ▼	-16.96 ▼	-19.05 ▼	-2.75 ▼

Note: Last price is for February 2024, *March 2024, **January 2023, and ***December 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%)

¹¹ Author's construction based on 1) FAO data for Rwanda, 2) national MIS Kenya & Tanzania

¹² Author's construction based on 1) FAO data for Rwanda & Uganda, 2) national MIS Kenya & Tanzania

Wheat Prices

Changes in the average prices of wheat/wheat flour are mixed (Table 7). Whereas Ethiopia mostly shows decline or low increases (0-5%) compared to the past 1-6 months, the prices of wheat and wheat flour in Kenya and South Sudan respectively show high increases, with Kenya having recorded 40.28% above what was recorded 3 months ago. Compared to a year ago, Ethiopia's current wheat price is 43% higher, while Kenya registered a 15.75% decline.

Table 7: Percentage Changes in Wheat prices in East Africa¹²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg*	6,972.83	-1.74 ▾	4.58 ▲	1.44 ▲	43.08 ✖
Kenya	Wheat	National Average, Retail, KES/KG*	70.46	5.69 ↑	40.28 ✖	12.59 ↑	-15.75 ▾
South Sudan	Wheat (flour)	National Average, Retail, SSP/Kg	1,994.76	12.38 ↑	24.68 ✖	-23.81 ▾	62.62 ✖
Tanzania	Wheat (Ngano)	National Average, Wholesale, TZS/100KG					

Note: Last price is for February 2024, *March 2024, **January 2023, and ***December 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%)

Fertiliser Prices

Fertiliser prices generally show lower trends across the East African region. Except CAN in Kenya, and Maize blend, Microp, and urea in Uganda, Fertiliser prices remain lower than the past 1-3 months due to off-season demands. CAN fertiliser in Kenya have had a significant increase by 192%, 83% and 131% compared to the past 1, 6, and 12 months. In Uganda, all Fertiliser types remain lower than a year ago, ranging from 8% to 35%. Fertiliser prices are however expected to uptick in the ensuing months as the region enters into the planting season.

Table 8: Percentage Changes in Fertiliser prices in East Africa¹⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG*	272.18	192.06 ✖	-7.52 ▾	83.00 ✖	131.11 ✖
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG*	200.29	-21.27 ▾	-34.79 ▾	4.77 ▲	51.24 ✖
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG*	111.27	-14.40 ▾	-38.96 ▾	25.12 ✖	-8.27 ▾
Rwanda	DAP	National Average USD/50KG**	49.77	-1.19 ▾	-3.68 ▾	-7.83 ▾	
Rwanda	NPK 17-17-17	National Average USD/50KG**	50.32	-1.20 ▾	-3.69 ▾	-7.86 ▾	
Rwanda	Urea	National Average USD/50KG	38.21	-0.49 ▾	-3.02 ▾	-7.03 ▾	
Uganda	AMMONIUM SULPHATE	National Average, Retail, UGX/50KG	170,000.00	0.00 ●	0.00 ●	-0.58 ▾	-19.05 ▾
Uganda	CAN	National Average, Retail, UGX/50KG	135,000.00	0.00 ●	3.85 ▲	3.85 ▲	-31.82 ▾
Uganda	DAP	National Average, Retail, UGX/50KG	160,000.00	0.00 ●	0.00 ●	0.00 ●	-8.57 ▾
Uganda	MAIZE BLEND	National Average, Retail, UGX/50KG	120,000.00	9.09 ↑	-7.69 ▾	-14.29 ▾	-35.14 ▾
Uganda	MICROP	National Average, Retail, UGX/50KG	115,000.00	9.52 ↑	4.55 ▲	-8.00 ▾	-34.66 ▾
Uganda	MICROP TOP DRESSING	National Average, Retail, UGX/50KG	145,000.00	3.57 ▲	-3.33 ▾	-3.33 ▾	-19.44 ▾
Uganda	Urea	National Average, Retail, UGX/50KG	180,000.00	5.88 ↑	20.00 ✖	20.00 ✖	-21.74 ▾

Note: Last price is for February 2024, *March 2024, **January 2023, and ***December 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%)

Seasonal Monitor and Cropping Conditions

In **Kenya**, above-average 2023 October to December short rains, and forecast of above-average March to May 2024 long rains are expected to support improved cropping conditions.¹⁵ In **Uganda**, land preparation and planting activities are ongoing driven by atypical off-season rainfall in January and February and an early start to the March to May 2024 first rainfall season with anticipated on-time and average first-season harvests in June and July 2024.¹⁶

¹² Author's construction based on 1) FAO data for Rwanda, 2) national MIS Ethiopia & Kenya

¹⁴ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya; 3) AFAP for Uganda

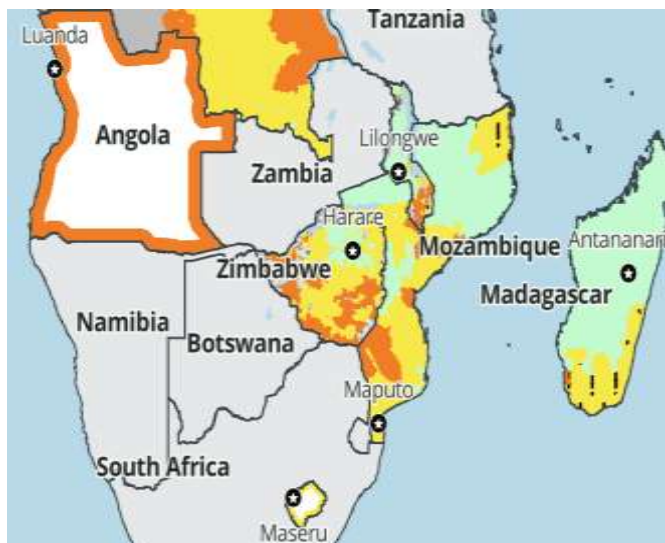
¹⁵ <https://fews.net/east-africa/kenya>

¹⁶ <https://reliefweb.int/report/uganda/uganda-key-message-update-crisis-ipc-phase-3-outcomes-persist-refugees-despite-favorable-second-season-harvest-january-2024>

Southern Africa Food Security Update

Food Security Outlook

Figure 8: Southern Africa Countries Food Security Outlook, October 2023 – January 2024



The Southern Africa region is facing an increasing food insecurity situation due to intense El Niño-induced drought. The region was projected to experience the El Niño weather phenomenon, characterized by higher temperatures, reduced precipitation, and general dry conditions. Parts of Zambia, Zimbabwe and Botswana experienced the driest February in the past 40 years, while severe rainfall shortages have been recorded in southern Malawi, eastern Angola, and parts of Mozambique. In **Zambia**, the El Niño driven drought has impacted 86 out of the country’s 116 districts, affecting more than a million farming households translating into 6.6 million people. In **Malawi**, the El Niño induced conditions such as inadequate rains, floods, and prolonged dry spells have also led to severe crops damage and affected food production in 23 of 28 districts, impacting at least 2 million households. **Zimbabwe** has also reported

the El Niño-induced drought which has resulted in more than 80% of the country receiving below-normal rainfall.¹⁷ Consequently, the governments of Malawi, Zambia, and Zimbabwe had declared a state of disaster and appealed for humanitarian assistance. Nonetheless, the food insecurity situation is expected to temporarily improve in Malawi as new harvests kick-in in April and May 2024 with some parts of the southern, central, and northern regions experiencing Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes.¹⁸ In **Mozambique**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes are envisaged throughout to September 2024 due to below-average harvest driven by the El Niño conditions and conflicts. WFP estimates over 1.2 million people are facing high levels of acute food insecurity (IPC Phase 3) in Cabo Delgado and Nampula during the current lean season (October 2023 – March 2024). In **Zimbabwe**, Crisis (IPC Phase 3) outcomes in deficit-producing areas and Stressed (IPC Phase 2) outcomes are also likely in surplus-producing areas due to a combination of expected poor harvests and macroeconomic challenges.¹⁹

Prevalence of insufficient food consumption

As of 31st March 2024, 23.2 million people across the four selected Southern African countries (see Table 9) did not have sufficient food for consumption, which is 400,000 more people than the February 2024 (22.8 million) level. This is a deterioration in the region’s food security situation compared to February 2024, with Zimbabwe being the main contributor to this increment as all other countries remain unchanged. The current level of food insecure people is also higher than it was recorded in the same period last year (19.9 million) and in 2022 (21.3 million).

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (February 2024)²⁰

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 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Malawi	18.10	6.80	6.80	37.57	0.00	-13.92	134.48
Mozambique	29.50	7.60	7.60	25.76	0.00	46.15	-26.21
Zambia	17.40	3.30	3.30	18.97	0.00	32.00	13.79
Zimbabwe	15.20	5.50	5.10	36.18	7.84	27.91	5.77

*Current month and **Previous 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%)

¹⁷ https://www.news24.com/fin24/climate_future/news/zimbabwe-declares-drought-a-disaster-joining-malawi-and-zambia-20240403




¹⁸ FEWS NET. Malawi Key Message Update March 2024

¹⁹ <https://fews.net/southern-africa/zimbabwe>

²⁰ Author’s construction based on HungerMap

Commodity Prices

Key drivers of prices in the Southern Africa region

	Seasonality Patterns	Most Southern African countries are experiencing seasonal declines in grain supplies as the lean season takes full effect, putting upward pressure on prices.
	Weather Shocks	The aftermath of the cyclone, drought shocks, and heavy flooding early in the planting season led to below-average harvests from the just-ended season, resulting in higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, caused by forex shortages, high food inflation, and high debt repayments, are driving high food prices.

Maize

Figure 9: National average price spreads for maize across select Southern African Countries

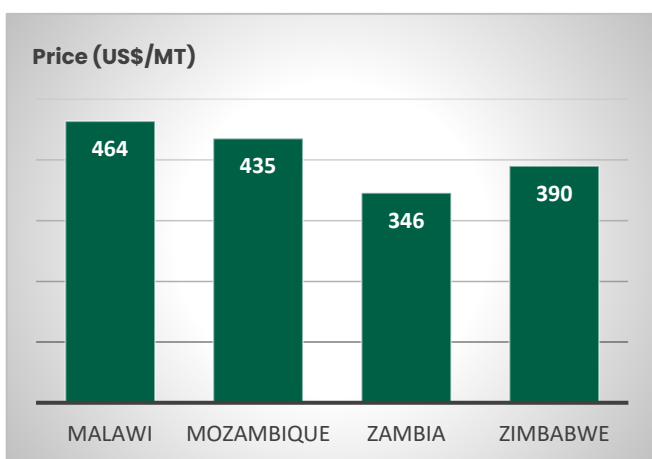


Figure 9 presents the price spread of maize in southern Africa with Malawi recording the highest price of US\$464 per metric ton and Zambia being the cheapest at US\$346 per ton. From table 10, however, current maize prices remain lower than the previous month's in Malawi and Mozambique due to the availability of green harvests and food assistance²¹, but the prices remain generally above their levels experienced 3–12 months ago in all monitored countries. The changes in prices of maize looks drastic in Zimbabwe than all other countries, showing 1,557.86% increment over the past 1 year's level.

Table 10: Percentage Changes in maize prices in Southern Africa²²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Lilongwe, MWK/Kg**	825.00	3.13 ▲	14.58 ↑	42.24 ⊗	175.00 ⊗
Malawi	Maize	Liwonde, MWK/Kg	828.00	-15.16 ↓	-4.17 ▾	7.32 ↑	25.26 ⊗
Malawi	Maize	Mzimba, MWK/Kg	678.00	-9.30 ↓	4.79 ▲	19.89 ⊗	37.73 ⊗
Malawi	Maize	Mzuzu, MWK/Kg	679.00	-7.27 ↓	6.93 ↑	19.38 ⊗	34.59 ⊗
Malawi	Maize	National Average, MWK/Kg	798.00	-11.50 ↓	7.26 ↑	16.71 ⊗	31.14 ⊗
Malawi	Maize	Nsanje, MWK/Kg	890.00	-11.85 ↓	15.58 ⊗	30.79 ⊗	40.54 ⊗
Mozambique	Maize (white)	Maputo, Retail, MZN/Kg***	34.29	0.00 ●	20.02 ⊗	50.00 ⊗	50.00 ⊗
Mozambique	Maize (white)	Montepuez, Retail, MZN/Kg***	28.57	0.00 ●	0.00 ●	15.39 ⊗	53.85 ⊗
Mozambique	Maize (white)	National Average, Retail, MZN/Kg***	27.51	-4.10 ▾	3.36 ▲	29.86 ⊗	22.03 ⊗
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	8.64	8.12 ↑	25.11 ⊗	59.13 ⊗	76.74 ⊗
Zimbabwe	Maize (white)	National Average, Retail, ZWL/Kg*	8,601.00	34.52 ⊗	247.77 ⊗	306.47	1,557.86 ⊗

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 2023

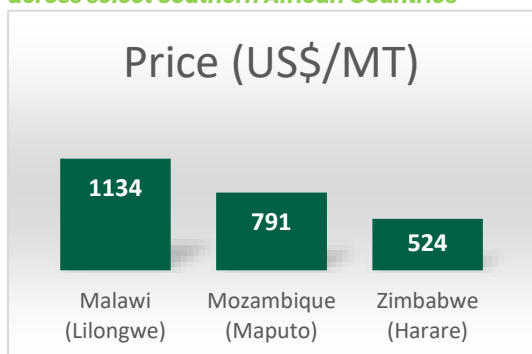
● = no change, ▲ = low increase (0–5%), ↑ = moderate increase (5–15%), ⊗ = high increase (>15%),
 ▾ = low decrease (0–5%), ↓ = moderate decrease (5–15%), ↓ = high decrease (>15%)

²¹ FEWS NET. Malawi Key Message Update March 2024

²² Author's construction based on FAO data

Rice

Figure 10: National average price spreads for rice across select Southern African Countries



From Figure 10, Malawi recorded the highest price of rice at US\$1,134/MT followed by Mozambique at US\$904/MT, with Zimbabwe being the cheapest at half of the price in Malawi. Nonetheless, table 11 shows that the price of rice in Harare has been increasing by almost 10% and 1,039% compared to the previous months and last year's levels respectively. Similarly, the price of rice has been experiencing rising trends in Lilongwe (Malawi), being 39.29% above last year's level. All monitored markets in Mozambique show stable or drops in rice prices or a low climb.

Table 11: Percentage Changes in rice prices in Southern Africa²³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	Lilongwe, MWK/Kg**	1,950.00	8.33 ↑	17.29 ⊗	14.71 ↑	39.29 ⊗
Malawi	Rice	Mzuzu, MWK/Kg**	1,900.00	0.00 ●	5.56 ↑	13.43 ↑	5.56 ↑
Mozambique	Rice (imported)	Maputo, Retail, MZN/Kg***	50.00	0.00 ●	-2.44 ↘	0.00 ●	0.00 ●
Mozambique	Rice (imported)	Montepuez, Retail, MZN/Kg***	60.00	0.00 ●	0.00 ●	0.00 ●	9.09 ↑
Mozambique	Rice (imported)	National Average, Retail, MZN/Kg***	57.15	2.04 ▲	-5.85 ↓	-4.40 ↘	3.87 ▲
Zimbabwe	Rice	Harare, Epworth, Retail, ZWL/Kg**	12,000.00	9.77 ↑	32.33 ⊗	68.08 ⊗	1,039.83 ⊗

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

Fertiliser

The national average price of all types of Fertilisers in Mozambique as in table 12 show stability or declines compared to the past 1-12 months due to low off-season demand for Fertilisers.

Table 12: Percentage Changes in Fertiliser prices in Southern Africa²⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Mozambique	NPK 12-24-12	Nationa Average, MZN/50KG**	3,101.00	0.00 ●	-1.43 ↘	-0.48 ↘	1.27 ▲
Mozambique	NPK 23-10-5 +3S + 1Zn	Nationa Average, MZN/50KG**	2,791.00	0.00 ●	0.00 ●	-4.06 ↘	-6.66 ↓
Mozambique	Urea	Nationa Average, MZN/50KG**	3,144.00	0.00 ●	-0.38 ↘	-6.18 ↓	-5.10 ↓

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

Seasonal Monitor and Cropping Conditions

The 2023-24 El Niño phenomenon has escalated regional climate patterns, triggering extreme dry conditions in Southern Africa, and subsequently causing widespread crop failure, leaving many countries on the brink of acute food insecurity. Parts of Zambia, Zimbabwe and Botswana experienced the driest February in the past 40 years, while severe rainfall shortages have been recorded in southern Malawi, eastern Angola, and parts of Mozambique. In Zambia, 1 million hectares (2.5 million acres) from 2.2 million planted crops have been destroyed due to the drought conditions. Below-average harvest is expected in Mozambique for the ongoing 2023/2024 agricultural season due to the negative effects of El Niño (heavy rainfall, flooding, and strong winds) with the recent Tropical Storm Filipo, and conflicts.²⁵

²³ Author's construction based on FAO data

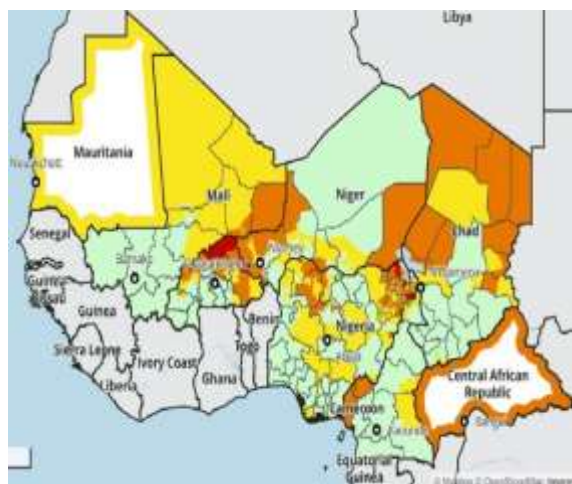
²⁴ Author's construction based on AfricaFertiliser.org

²⁵ FEWS NET. Mozambique Key Message Update March 2024

West Africa Food Security Update

Food Security Outlook

Figure 11: West African countries Food Security Outlook, October 2023 – January 2024



Burkina Faso: An acute food insecurity Crisis! (IPC Phase 3!) and Emergency (IPC Phase 4) outcomes are expected, particularly in Djibo and northern Burkina Faso, between March and September 2024 due to seasonal depletion of stocks as the lean season sets in and the impact of conflicts.²⁶

In **Niger**, the regions of Tahoua and Tillabéry, and Diffa and Maradi are expected to experience Crisis (IPC Phase 3) and Stressed (IPC Phase 2) respectively. IPC 3 conditions are driven by the depletion of household stocks combined with the atypical rise in food prices and conflicts, while IPC 2 conditions are supported by increased food assistance to these regions.

Nigeria: Conflicts and poor economic conditions are driving Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes in most parts of Nigeria, particularly in conflict-affected areas.²⁷

Prevalence of insufficient food consumption

As of 31st March 2024, 158.5 million people across seven selected West African countries had insufficient food for consumption, an increase of 300,000 people over the previous month (see Table 13) signifying a deterioration in the region's food security situation over the past one month driven mainly by a rise in Cote d'Ivoire. The prevalence of insufficient food consumption in March 2024 remains above last year's (126.7 million people) and two years ago (106.5 million people).

Table 13: Prevalence of insufficient food consumption in selected West African countries (March 2024)⁴¹

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 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Burkina Faso	19.80	11.20	11.20	56.57	0.00	-11.11	-0.88
Cote d'Ivoire	29.40	5.10	4.70	17.35	8.51	24.39	-7.27
Ghana	29.80	5.30	5.40	17.79	-1.85	-41.11	-1.85
Mali	19.10	13.20	13.20	69.11	0.00	-5.71	11.86
Niger	25.90	21.40	21.40	82.63	0.00	12.04	44.59
Nigeria	202.80	100.40	100.40	49.51	0.00	53.99	80.58
Togo	7.90	1.90	1.90	24.05	0.00	-29.63	-9.52

*Current month and **Previous 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%)

²⁶ <https://fews.net/west-africa/burkina-faso>

²⁷ <https://fews.net/west-africa/nigeria>

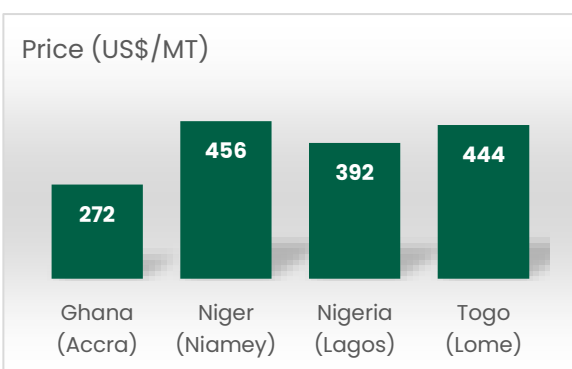
Commodity prices

Key drivers of the price movements in West Africa include²⁸

	Insecurity & Armed Conflicts	Conflict and insecurity as well as political tension in West Africa continue to disrupt agriculture, trade, and food assistance activities, resulting in higher food prices.
	Macroeconomic Challenges	Poor macroeconomic conditions, driven by local currency depreciations and high fuel and transport costs, are increasing food prices in some West African countries.
	Seasonal Dynamics	Seasonal harvests in most West African countries are improving food availability, hence lowering or stabilizing prices in these countries.

Maize

Figure 12: Price spreads for Maize across select WA Countries



From Figure 12, the price of maize appears cheaper in Accra, Ghana than the prices in the capital cities of other monitored countries. This is further corroborated by the decline in the prices of maize in all monitored markets in Ghana compared to the past 1-12 months (Table 14). Nigeria, on the other hand, has consistently registered higher prices (>15%), with the current price in monitored markets ranging between 122% and 172% above the previous month's level. Conflicts in the north and macroeconomic challenges are key drivers of rising prices in Nigeria. In Niger and Togo, the changes in maize prices demonstrate only low to moderate increases and in some cases lower than certain reference periods.

Table 14: Percentage Changes in maize prices in West Africa²⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize	Kumasi, Retail, Ghc/KG**	3.11	-52.73 ↓	-56.83 ↓	-66.11 ↓	-65.96 ↓
Ghana	Maize	Sekondi/Takoradi, Retail, Ghc/KG**	4.56	-2.61 ↘	-0.09 ↘	-63.33 ↓	-55.49 ↓
Ghana	Maize (white)	Accra, Retail, Ghc/KG**	3.60	-4.13 ↘	-5.61 ↓	-47.44 ↓	-44.34 ↓
Niger	Maize	Agadez, Retail, XOF/Kg**	380.00	5.56 ↑		11.76 ↑	18.75 ⊗
Niger	Maize	Dosso, Retail, XOF/Kg**	296.00	3.50 ▲	2.07 ▲	-5.43 ↓	18.40 ⊗
Niger	Maize	Maradi, Retail, XOF/Kg**	294.00	10.94 ↑	4.63 ▲	-17.18 ↓	22.50 ⊗
Niger	Maize	Niamey, Retail, XOF/Kg**	277.00	1.84 ▲	-7.67 ↓	-10.65 ↓	19.40 ⊗
Niger	Maize	Tillaberi, Retail, XOF/Kg**	323.00	11.38 ↑	-5.83 ↓	0.31 ▲	9.12 ↑
Niger	Maize	Zinder, Retail, XOF/Kg**	290.00	7.81 ↑	-1.69 ↘	-11.04 ↓	17.41 ⊗
Nigeria	Maize (white)	Giwa, NGN/KG**	498.00	172.88 ⊗	218.72 ⊗	96.26 ⊗	40.28 ⊗
Nigeria	Maize (white)	Ibadan, NGN/KG**	580.00	123.08 ⊗	117.23 ⊗	109.01 ⊗	59.34 ⊗
Nigeria	Maize (white)	Kano, NGN/KG**	519.00	136.80 ⊗	145.77 ⊗	86.62 ⊗	31.69 ⊗
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	506.00	130.68 ⊗	145.57 ⊗	88.74 ⊗	38.06 ⊗
Nigeria	Maize (white)	Lagos, NGN/KG**	546.00	122.18 ⊗	120.83 ⊗	102.60 ⊗	39.29 ⊗
Nigeria	Maize (white)	Maiduguri, NGN/KG**	490.00	133.33 ⊗	139.02 ⊗	86.67 ⊗	27.27 ⊗
Togo	Maize (white)	Amegnran, XOF/Kg**	255.00	13.33 ↑	13.33 ↑	2.00 ▲	-0.78 ↘
Togo	Maize (white)	Anie, XOF/Kg**	240.00	11.63 ↑	11.63 ↑	-3.61 ↘	9.09 ↑
Togo	Maize (white)	Cinkassé, XOF/Kg**	250.00	13.64 ↑	11.11 ↑	-5.66 ↓	-0.79 ↘
Togo	Maize (white)	Kara, XOF/Kg**	250.00	0.00 ●	-7.41 ↓	-14.09 ↓	-0.79 ↘
Togo	Maize (white)	Kor bongou, XOF/Kg**	247.00	12.27 ↑	12.27 ↑	-5.00 ↓	-1.20 ↘
Togo	Maize (white)	Lomé, XOF/Kg**	270.00	10.20 ↑	3.85 ▲	-5.59 ↓	1.12 ▲

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

²⁸ Fewsnet 2024

²⁹ Author's construction based on FAO data

Rice

Figure 13: Price spreads for rice across select WA Countries

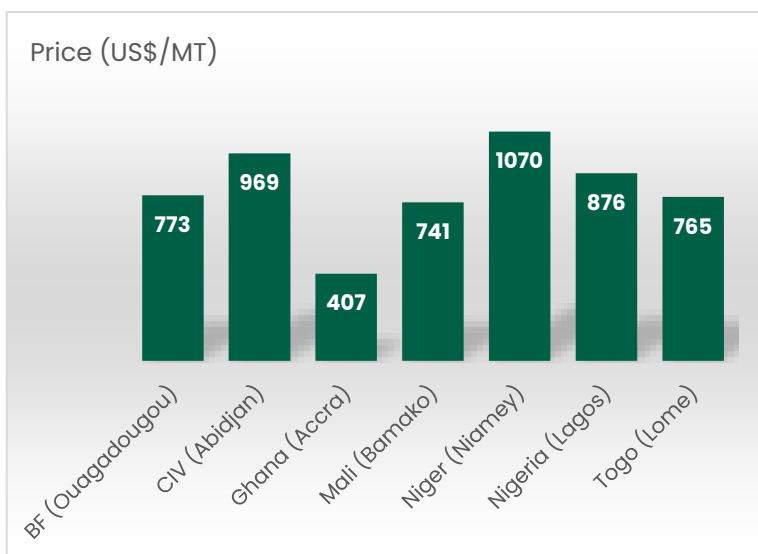


Figure 13 presents the price spread for rice across select West African countries, showing rice prices in Niamey to be more expensive and cheapest in Accra than all other select capital cities. Nonetheless, from table 15, the changes in the prices of rice across the monitored markets in West Africa show lower trends in Ghana, Mali, and Togo. Niger and Nigeria show significant increases in the prices of rice over the reference periods, with Nigeria particularly recording 77.46% and 48.92% in Ibadan and Lagos respectively compared to the previous month. In Burkina Faso and Cote d'Ivoire, the prices of rice have remained mostly stable over the past one month.

Table 15: Percentage Changes in rice prices in West Africa³⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg*	42,000.00	0.00	5.00	0.00	0.00
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg*	47,000.00	2.17	17.50	20.51	13.25
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg**	589.00	0.00	0.86	4.99	5.94
Cote d'Ivoire	Rice (imported)	Abidjan, Retail, XOF/Kg**	503.00	0.00	1.00	7.71	13.29
Ghana	Rice (imported)	Accra, Retail, Ghc/KG**	5.28	0.08	1.01	-73.59	-47.18
Ghana	Rice (imported)	Kumasi, Retail, Ghc/KG**	5.94	-2.30	-2.11	-60.82	-37.64
Ghana	Rice (local)	Accra, Retail, Ghc/KG**	5.38	-5.04	-5.45	-77.59	-73.11
Ghana	Rice (local)	Kumasi, Retail, Ghc/KG**	6.29	11.99	10.08	-51.62	-51.62
Mali	Rice	Bamako, Wholesale, XOF/100 KG*	45,000.00	11.11	-0.76	-2.17	-2.17
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG*	35,000.00	0.00	-20.45	-30.00	-20.45
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG*	43,000.00	0.00	-5.23	0.00	0.00
Niger	Rice (imported)	Agadez, Retail, XOF/Kg**	713.00	1.86	18.83	42.60	42.60
Niger	Rice (imported)	Niamey, Retail, XOF/Kg**	650.00	0.00	-2.55	30.00	30.00
Nigeria	Rice (imported)	Ibadan, NGN/KG**	1,260.00	77.46	92.66	96.72	30.98
Nigeria	Rice (imported)	Lagos, NGN/KG**	1,312.00	48.92	56.00	61.58	15.90
Nigeria	Rice (milled)	Ibadan, NGN/KG**					
Togo	Rice (imported)	Anie, XOF/Kg**	460.00	-8.00	-6.12	-4.17	0.00
Togo	Rice (imported)	Lomé, XOF/Kg**	465.00	-7.92	-5.10	-5.10	1.09

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

³⁰ Author's construction based on FAO data

Millet

Figure 14: Price spreads for rice across select WA Countries

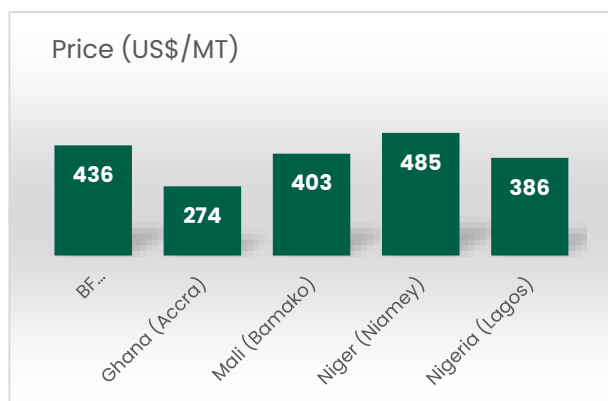


Figure 14, which presents the price spread for millet across select West African countries, shows that millet is more expensive in Niamey (US\$485/MT) and cheaper in Accra (US\$274/MT) than in all the other cities. From table 16, the price of millet across the selected West African markets shows an overall increase over the previous month. Nigeria particularly has seen significant increases in millet price ranging from 88% and 112% compared to the previous month driven by persistent conflicts in the north and macroeconomic challenges.

Table 16: Percentage Changes in millet prices in Ghana³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg*	32,500.00	0.00	22.64	-8.45	-10.96
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg*	33,500.00	3.08	-1.47	-4.29	4.69
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg*	26,500.00	1.92	0.00	-5.36	-10.17
Ghana	Millet	Accra, Retail, Ghc/KG**	3.62	-36.14	-36.94	-61.46	-61.46
Ghana	Millet	Kumasi, Retail, Ghc/KG**	4.89	12.74	11.30	-54.88	-43.18
Ghana	Millet	Tamale, Retail, Ghc/KG**	4.28	19.01	15.42	-50.25	-53.08
Mali	Millet	Bamako, Wholesale, XOF/100 KG*	24,500.00	2.08	-45.93	-2.00	-5.77
Mali	Millet	Gao, Wholesale, XOF/100 KG*	32,500.00	1.56	-28.47	-7.14	8.33
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG*	32,500.00	8.33	8.33	-18.75	8.33
Niger	Millet	Agadez, Retail, XOF/Kg**	298.00	0.68	-11.04	-5.70	-5.70
Niger	Millet	Dosso, Retail, XOF/Kg**	275.00	-0.72	-1.79	-14.06	5.77
Niger	Millet	Niamey, Retail, XOF/Kg**	295.00	7.27	-2.64	-11.41	5.73
Nigeria	Millet	Giwa, NGN/KG**	479.00	112.89	128.10	53.28	9.49
Nigeria	Millet	Kano, NGN/KG**	509.50	104.47	102.99	77.62	29.20
Nigeria	Millet	Lagos, NGN/KG**	538.00	88.11	85.04	70.25	22.55

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

Sorghum

Figure 15: Price spreads for sorghum across select WA Countries

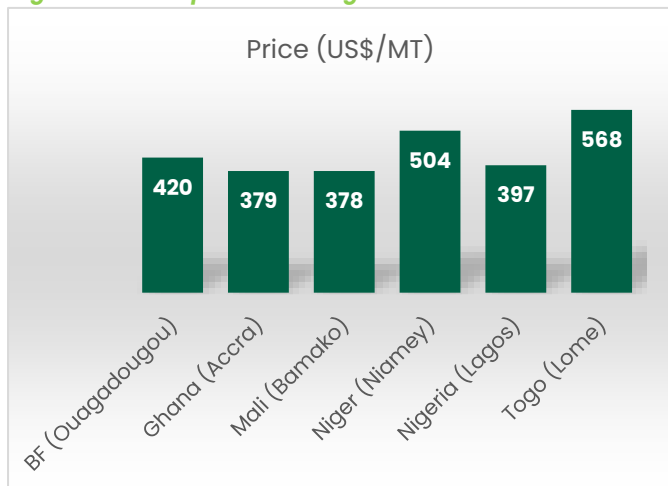


Figure 15 shows the price spreads for sorghum across select West African countries, with Lome registering the highest price per metric ton whereas Bamako and Accra recording the least expensive millet prices in the region. However, changes in prices depicted in table 17 shows that selected markets in Togo have had significant declines in prices of sorghum over the past 1-6 months, while the selected markets of Burkina Faso, Ghana, Mali, Niger, and Nigeria demonstrate rising trends over the past one month. Again, the price of sorghum in Nigeria shows a huge increment, ranging from 82-120%, compared to the past 1-6 months due to early depletion of stocks from the below-average harvests.

³¹ Author's construction based on FAO data

Table 17: Percentage Changes in prices in Mali³²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg*	25,000.00	16.28 ⬇️	16.28 ⬇️	11.11 ⬆️	8.70 ⬆️
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg*	28,500.00	3.64 ⬆️	-1.72 ⬇️	-5.00 ⬇️	3.64 ⬆️
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg*	25,500.00	21.43 ⬇️	18.60 ⬇️	13.33 ⬆️	6.25 ⬆️
Ghana	Sorghum	Accra, Retail, Ghc/KG**	5.01	-24.89 ⬇️	-27.52 ⬇️	-29.88 ⬇️	-46.11 ⬇️
Ghana	Sorghum	Kumasi, Retail, Ghc/KG**	4.47	2.12 ⬆️	1.10 ⬆️	-55.33 ⬇️	-45.12 ⬇️
Ghana	Sorghum	Tamale, Retail, Ghc/KG**	4.26	13.99 ⬆️	10.63 ⬆️	-45.21 ⬇️	-47.83 ⬇️
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG*	23,000.00	27.78 ⬇️	-49.34 ⬇️	-4.17 ⬆️	-4.17 ⬆️
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG*	23,000.00	12.20 ⬆️	0.00 ⬆️	-4.17 ⬆️	-8.00 ⬇️
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG*	21,000.00	5.00 ⬆️	16.67 ⬇️	-6.67 ⬇️	-19.23 ⬇️
Niger	Sorghum	Agadez, Retail, XOF/Kg**	300.00	0.00 ⬆️	-15.97 ⬇️	-5.36 ⬇️	-5.36 ⬇️
Niger	Sorghum	Dosso, Retail, XOF/Kg**	318.00	-10.92 ⬇️	-5.07 ⬇️	2.58 ⬆️	13.57 ⬆️
Niger	Sorghum	Maradi, Retail, XOF/Kg**	255.00	12.83 ⬆️	-10.21 ⬇️	-23.42 ⬇️	14.35 ⬆️
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	576.00	105.71 ⬇️	105.71 ⬇️	100.35 ⬇️	-14.03 ⬇️
Nigeria	Sorghum (white)	Kano, NGN/KG**	439.30	114.79 ⬇️	120.37 ⬇️	83.54 ⬇️	12.83 ⬆️
Nigeria	Sorghum (white)	Lagos, NGN/KG**	552.00	95.05 ⬇️	100.18 ⬇️	82.78 ⬇️	-16.62 ⬇️
Togo	Sorghum	Cinkassé, XOF/Kg**	275.00	-21.43 ⬇️	-11.29 ⬇️	-8.33 ⬇️	10.00 ⬆️
Togo	Sorghum	Kara, XOF/Kg**	300.00	-25.00 ⬇️	-16.67 ⬇️	-23.08 ⬇️	8.70 ⬆️
Togo	Sorghum	Lomé, XOF/Kg**	345.00	-26.60 ⬇️	-25.81 ⬇️	-27.37 ⬇️	1.47 ⬆️

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

Fertiliser

Overall, the prices of monitored fertiliser types across the selected West African countries show declining trends except for NPK fertiliser types in Ghana and urea in Nigeria which show low increases (0-5%) compared to certain reference periods. The trend reflects low demands typically seen during the off-season periods in the region.

Table 18: Percentage Changes in Fertiliser Prices in West Africa³³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG	33.94	-10.90 ⬇️	-10.02 ⬇️	-15.61 ⬇️	-38.38 ⬇️
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG	36.47	-5.35 ⬇️	-4.43 ⬆️	-11.39 ⬇️	-34.01 ⬇️
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG	34.00	-5.29 ⬇️	-4.36 ⬆️	-13.00 ⬇️	-30.80 ⬇️
Ghana	Amonium Sulphate	National Average, (US\$/50kg)**	22.81	-0.70 ⬆️	-4.16 ⬆️	-13.20 ⬇️	-14.92 ⬇️
Ghana	NPK 15-15-15	National Average, (US\$/50kg)**	34.49	-1.32 ⬆️	-2.13 ⬆️		
Ghana	NPK 20-10-10	National Average, (US\$/50kg)**	32.91	-0.90 ⬆️	3.52 ▲	-16.81 ⬇️	-6.05 ⬇️
Ghana	NPK 23-10-5	National Average, (US\$/50kg)**	36.16	-0.88 ⬆️	-3.39 ⬆️	-9.12 ⬇️	-9.74 ⬇️
Ghana	NPK 25-10-10	National Average, (US\$/50kg)**	32.33	2.25 ▲	-2.47 ⬆️		
Ghana	Urea	National Average, (US\$/50kg)**	33.78	-0.24 ⬆️	-2.37 ⬆️	-12.21 ⬇️	-29.49 ⬇️
Niger	NPK 15-15-15	National Average, USD/50KG*					
Niger	Urea	National Average, USD/50KG*					
Nigeria	NPK 15-15-15	National, USD/50KG	29.94	-8.64 ⬇️	-14.09 ⬇️	-13.19 ⬇️	-47.68 ⬇️
Nigeria	NPK 20-10-10	National, USD/50KG	27.50	-8.15 ⬇️	-12.92 ⬇️	-11.55 ⬇️	-47.90 ⬇️
Nigeria	Urea	National, USD/50KG	25.52	-11.14 ⬇️	0.55 ▲	4.25 ▲	-44.67 ⬇️

Note: Last price is for January 2024, *February 2024, **December 2023, and ***November 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%)

³² Author's construction based on FAO data

³³ Author's construction based on AfricaFertiliser.org

Seasonal Monitor and Cropping Conditions

Most West African countries have entered into their lean season with market gardening production activities being the main agriculture activities taking place. In Niger, market gardening produce are in their harvest phase.³⁴ In Mali, there is an early and harsher onset of the lean season, although the current off-season crops for both market gardening crops and rice and flood recession crops are generally average in the country.³⁵

³⁴ FEWS NET. Niger Updated key messages March 2024

³⁵ <https://fews.net/west-africa/mali>

Food Trade Updates

Continental

Figure 16 provides an overview of the events and activities that have taken place across various countries in East Africa in the last month and are affecting food trade in the region.

Figure 16: Continental Cross border trade updates March 2024



The African Union has adopted the African Continental Free Trade Area (AfCFTA) Protocol on Women and Youth in Trade as well as Protocols on Investment and Digital Trade.

The Afreximbank officially launched the Fund for Export Development in Africa (FEDA) in Kigali, on March 20, to tackle Africa's \$110 billion financing gap for intra-African trade, value-added export development, and industrialisation value chains. Rwanda became the first among 15 African nations to ratify its establishment agreement and is now hosting the \$1 billion AfCFTA Adjustment Fund managed by FEDA.

East Africa

Figure 17 provides an overview of the events and activities that have taken place across various countries in East Africa in the last month and are affecting food trade in the region.

Figure 17: East Africa Cross border trade updates March 2024



Tanzania & Rwanda

- Tanzania and Ethiopia signed bilateral agreements targeting agriculture, trade, energy and air transport and aviation technology exchange.
- Rwanda and Tanzania are to open a new border post at Tanzania's Kyerwa district in Kagera Region, to provide a second passage for people and goods and reduce pressure on the Rusumo border post.

Southern Africa

Figure 18 below summarises some key activities and events recorded across Southern Africa impacting food trade activities.

Figure 18: Southern Africa Food Trade updates for March 2024



Zimbabwe

The government of Zimbabwe has received 25,000 tons of grain and 23,000 tons of Fertiliser from Russia as assistance to help combat the effects of El Nino-induced drought, which has dwindled crop yields in most parts of Southern Africa (VoA).

Malawi

The Government of Malawi has placed restriction on the export of raw soya beans, effective 4th April 2024.

West Africa

Figure 19 provides an update of the issues and events reported in selected West African countries with implications on food trade and food security in the region.

Figure 19: West Africa Cross Border Trade Updates March 2024



Nigeria

- The Government of Nigeria has directed the reopening of Nigeria's land and air borders with the Republic of Niger and the lifting of other sanctions against the country with immediate effect.
- Nigeria has secured \$1.3 billion from a consortium led by the China Civil Engineering Construction Company (CCECC) to complete a railway project connecting Nigeria and Niger, to boost trade and cultural cooperation between the two countries.



Value	Unrealized P/L	%Unre
000.00		
5,700.00	-14,930.33	-10
1,200.00	+5,309.28	+10
500.00	+13,022.92	+10

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.

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