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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 46th 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 April 2024 Food Security Monitor are summarised below:

Food Security Updates

In Southern Africa, despite the eminent food crisis expected in the ensuing months, particularly in Zambia, Malawi, and Zimbabwe, due to the impact of the prolonged El Niño driven drought, food supply is improving, and maize prices have been observed to have dropped compared to the previous month due to ongoing harvests, albeit below-average. Nonetheless, food insecurity concerns persist in typical deficit production areas of southern Zimbabwe, Mozambique, Malawi, Madagascar, eastern and northern DRC driven by the El Niño-induced drought, macroeconomic shocks, and in the DRC and northern Mozambique by conflict. Preliminary estimates show a regional deficit of about 5 million Mt of maize grain, with Zambia and Malawi needing about 1.6 million Mt. In Zimbabwe, estimates show that the harvest from the 2023-24 season may decline by 72% from last year due to the worst drought experienced in four decades as a result of the El Niño conditions.

In **Eastern Africa**, Sudan, South Sudan, and Ethiopia remain the high food insecure countries in the region driven by deteriorating macro-economic conditions, high incidences of conflicts that are disrupting livelihoods, trade, and food assistance delivery, and a high burden of returnees from Sudan in the case of South Sudan. The Food Security and Nutrition Working Group (FSNWG) estimate 79,000 people to be at risk of Catastrophe (IPC Phase 5) conditions in South Sudan.

In **West Africa**, high food insecurity, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes prevail across the region driven by poor macroeconomic conditions, conflicts and insecurity, early onset of the lean season with its attendant high food prices.

At the Global level, both the FAO Food Price Index (FFPI) and the International Grain Council's (IGC) Grain and Oil Index (GOI) show a minor uptick in grain prices in April over March supported by a marginal increase in cereal prices counterbalanced by stability in wheat prices driven by unfavourable production prospects among major producers and strong competition among major exporters.

Food Trade Updates

- The government of Zambia has suspended import duty of 15% and surtax of 5% on importation of maize to zero. This policy measure is to incentivize the private sector to participate in the importation of the grain against the eminent food shortage at the back of the El Niño-induced drought.
- The Uganda Revenue Authority (URA) has increased the withholding tax on the import of Irish potatoes from Kenya by up to 10 times, i.e. from Ush9 (\$0.0024) to Ush93.6 (\$0.025) per kilo.
- The Government of Nigeria has launched its 'Advanced Ruling' system which is a critical mechanism that allows traders to obtain binding decisions from Customs administrations on the classification, origin, and valuation of goods before importation.

Food Commodity Prices Updates

Overall, grain prices remain generally lower than they were in the past 1-12 months in the **East African** region, due to increased supplies from December/January harvests. However, the price of wheat remains generally elevated in Kenya and South Sudan compared to similar periods. In **Southern Africa**, the prices of monitored commodities (maize and rice) have declined in most countries over the past one month due to on-going harvests. However, maize price remains elevated in Zambia compared to the past 1-12 months, while the price of rice is higher between 42% and 904% than it was 1-12 months ago in Zimbabwe. In **West Africa**, the changes in grain prices show mixed trends. However, Nigeria and Niger consistently show higher price trends compared to the past 1-12 months for most grains.

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 across 17 countries selected from East, Southern, and West Africa. During this month, Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%) 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, 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.

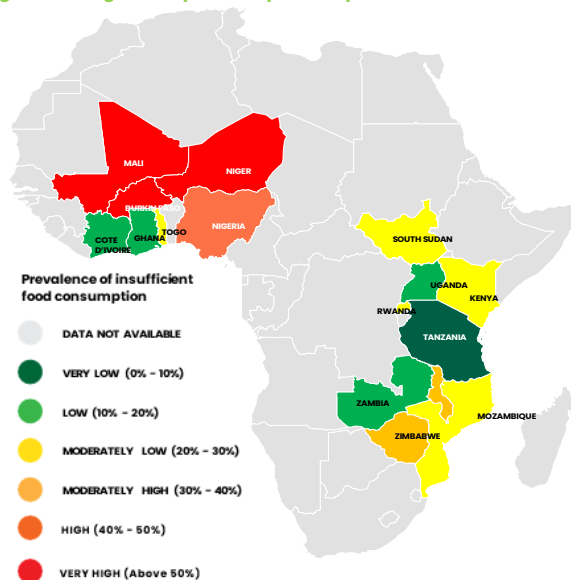
On the other hand, the national average maize prices, compared to the past six months declined in most countries, except in Malawi, Mozambique, Nigeria, South Sudan, Zambia, and Zimbabwe. Both Burkina Faso and Mali experienced decline in their national average price of millet compared to the past 6 and 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	2.75	0.88	-2.92
Cote d'Ivoire	0.00	37.84		
Ethiopia			4.09	37.38
Ghana	-1.89	-31.58	-58.96	-55.26
Kenya	0.00	11.48	-44.86	-54.97
Malawi	0.00	21.43	10.47	10.55
Maï*	0.00	0.00	8.71	-7.54
Mozambique	0.00	-7.32	-0.15	2.73
Niger	0.00	40.79	-10.35	22.31
Nigeria	0.00	52.35	131.38	66.73
Rwanda	3.85	-10.00	-31.78	-23.67
South Sudan	6.25	-46.88	35.71	-8.06
Tanzania	0.00	-5.45	-26.55	-41.57
Togo	-5.26	-33.33	6.52	-2.46
Uganda	0.00	-47.47	-27.77	-41.34
Zambia	0.00	-10.81	54.76	71.06
Zimbabwe	0.00	77.42	135.02	984.61

Key: ○ No Change ↑ = increase ↓ = decrease

Figure 1: Hunger Hotspots Snapshot, April 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) was up marginally by 0.3% in April compared to March. This was due to a rise in price indices for meat, vegetable oil, and cereal, counterbalanced by a decline in those for sugar and dairy products.³ The rise in cereal prices was driven by unfavourable production prospects among major producers and strong competition among major exporters, which was also counterbalanced by stability in wheat prices. Changes in the International Grain Council's (IGC) Grain and Oil Index (GOI) (Table 2) show a slightly stronger increase of 1.42% compared to the previous month driven by a rise in the sub-indices of wheat, maize, and barley. Compared to the past year, however, the GOI declined by 14.03% driven by a decline in most sub-indices of wheat (12.77%), maize (21.95%), soyabeans (17.56%) and barley (16.4%). Rice sub-index, however, rose by 21.02% over the past year.

Figure 2: FAO Food Price Index (FFPI)

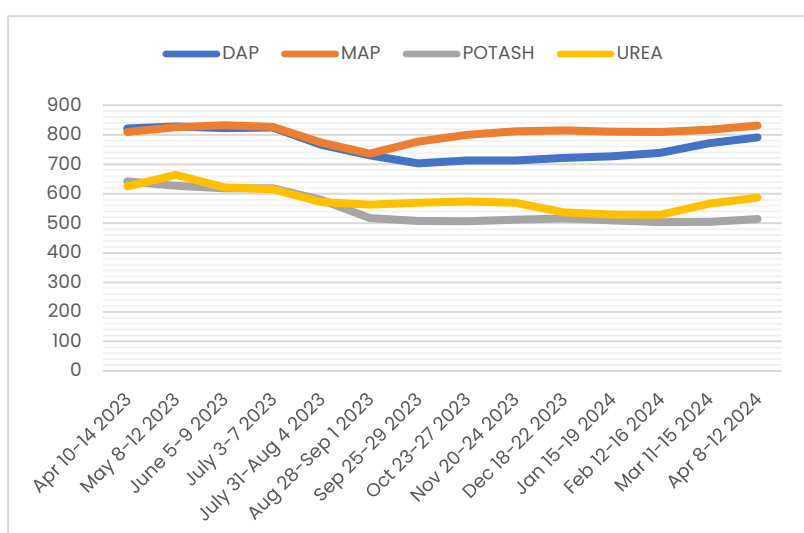


Table 2: IGC GOI Commodity Price Indices

	Jan 2000 = 100	29-April	% Change 1M	% Change 1Y
GOI		230.44	1.42	-14.03
Wheat		210.17	5.86	-12.77
Maize		206.57	3.13	-21.95
Rice		246.17	-1.22	21.02
Soya Beans		221.15	-0.53	-17.56
Barley		214.12	3.86	-16.40

Global Fertiliser Prices

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



All fertiliser types being monitored show an uptick in prices in April compared to March but remain lower than they were a year ago except for MAP which is 2.7% higher than its one-year level (Figure 3). Potash and urea remain almost 20% and 6.1% lower respectively than in April 2023.

Source: Author's construction based on World Bank data⁴

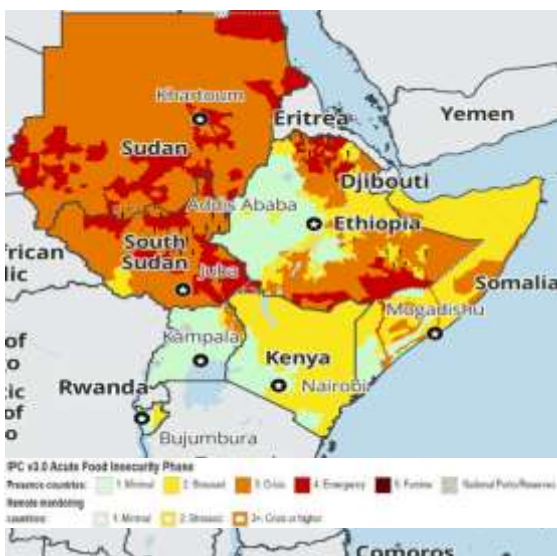
³ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁴ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2024/04/17/fertilizer-prices-higher-third-week>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, February – May 2024



Tigray and northeastern Amhara regions of **Ethiopia** are expected to remain in widespread Emergency (IPC Phase 4) and Crisis! (IPC Phase 3!), outcomes underpinned by conflicts and poor past harvests.⁵ In **Kenya**: IPC 2 conditions prevailed across the country supported by above-average short-rain October–December season. In **South Sudan**: IPC Phase 4 outcomes are widespread across the northern and eastern parts of the country, with the Food Security and Nutrition Working Group (FSNWG) estimating 79,000 people to be at risk of Catastrophe (IPC Phase 5) conditions in some parts of the country and among returnees. This is largely due to deteriorating macroeconomic conditions, high incidences of conflicts that are disrupting livelihoods, trade, and food assistance delivery, and high burden of returnees from Sudan. In **Uganda**: IPC 1 and 2 conditions prevail in bimodal areas while Crisis (IPC Phase 3) persists in Karamoja and refugee settlements.

Prevalence of insufficient food consumption

As of 30th April 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 33.2 million, implying a deterioration of the food insecurity situation across these select countries, driven mainly by increase in Rwanda and South Sudan. The current number of people with insufficient food for consumption is, however, lower than in 2023 (42.9 million) and 2022 (37.2 million). Table 3 below provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries in April 2024.

Table 3: Prevalence of insufficient food consumption across selected East African countries (February 2024)⁶

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	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	11.48	109.23
Rwanda	12.30	2.70	2.60	21.95	3.85	-10.00	-3.57
South Sudan	11.00	3.40	3.20	30.91	6.25	-46.88	-46.03
Tanzania	56.30	5.20	5.20	9.24	0.00	-5.45	-1.89
Uganda	42.70	8.30	8.30	19.44	0.00	-47.47	-49.08

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

⁶ Author's construction based on WFP HungerMap

Commodity Prices

Key drivers of commodity prices in EA⁷

	Conflicts	Conflicts and insecurity persist particularly in South Sudan and Ethiopia preventing price recovery from high levels despite harvests.
	Seasonal Dynamics	Harvests from the October–December season in the region are improving supplies in most markets resulting in lower prices across the region.
	Macroeconomic Shocks	Poor macroeconomic conditions, an influx of returned refugees from Sudan, 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 Countries⁸

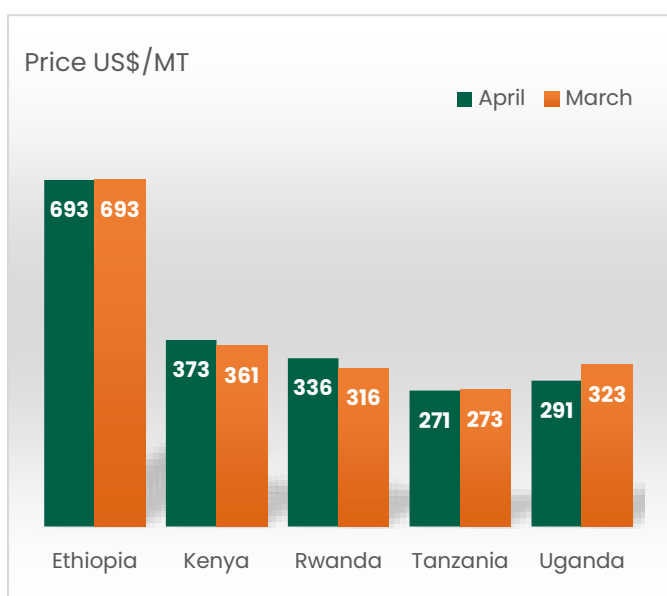


Figure 5 presents the national average price spreads for maize across select East African Countries. This shows that the price of maize is lowest in Tanzania at US\$271/ton, attributed to adequate domestic availability and reduced export demand, and most expensive in Ethiopia at US\$693/ton. Table 4 shows changes in the prices of maize across the region which generally show declining trends due to above-average harvests from the previous season. Nonetheless, current prices in Ethiopia, Kenya, and Rwanda show uptick over the previous month by 0.49%, 5.17%, and 7.06% respectively. Also, despite a marginal decline in the price of maize in South Sudan in April over March, the price level remains 29.55% and 35.71% higher than it was 3 and 6 months ago respectively. Deteriorating macro-economic conditions, rising incidents of conflict that are disrupting livelihoods, trade, and food assistance delivery, and high returnees are key drivers of rising food prices in South

Sudan.⁹

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*	7,006.82	0.49 ▲	-1.80 ▼	4.09 ▲	37.38 ☒
Kenya	Maize	National Average, Retail, KES/KG*	49.83	5.17 ▲	-44.26 ▼	-44.86 ▼	-54.97 ▼
Rwanda	Maize	National Average, Retail, RWF/Kg	430.00	7.06 ▲	-14.35 ▼	-31.78 ▼	-23.67 ▼
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	407.55	-1.72 ▼	29.55 ☒	35.71 ☒	-8.06 ▼
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	70,000.00	-4.55 ▼	-18.03 ▼	-26.55 ▼	-41.57 ▼
Uganda	Maize (white)	National Average, Retail, UGX/Kg	1,105.68	-0.61 ▼	-16.52 ▼	-27.77 ▼	-41.34 ▼

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

⁷ Fewsnet, 2024

⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁹ <https://fews.net/east-africa/south-sudan>

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 Countries¹¹

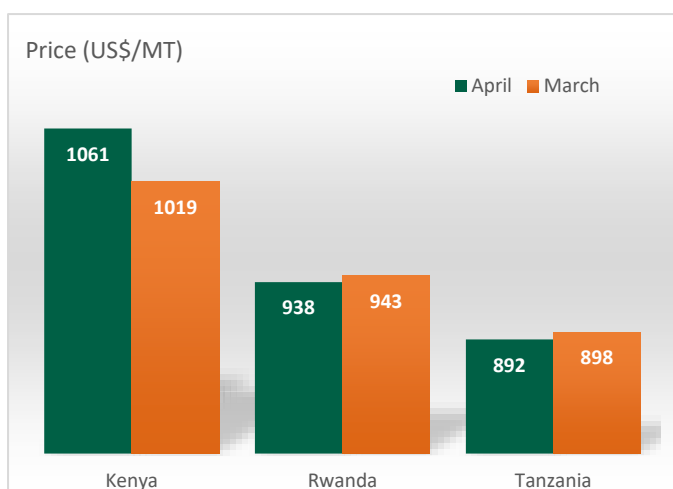


Figure 6, presents the price spread between East African countries, showing that the price of rice is most expensive in Kenya compared to Rwanda and Tanzania, with Tanzania being the cheapest at US\$892 per ton, mainly attributed to above-average rice harvests in Tanzania¹². From Table 5, rice prices in the three monitored East African countries generally show declining trends, although Kenya has registered moderate increases of 6-7% over the past 3-6 months. Significant drops are seen in Kenya and Tanzania at 18.41% and 21.98% respectively compared to the past year. Although the national average price of rice in Rwanda remains stable or declined over the past 1 and 3 months, it is 8.72% above what it was six months ago, and a minimal surge of 0.17% compared to the past year.

Table 5: Percentage Changes in Rice prices in East Africa¹³

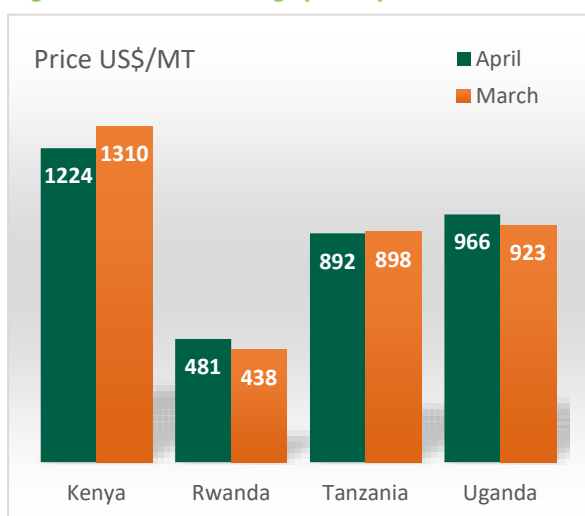
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG*	141.83	6.10 ↑	7.53 ↑	-7.24 ↓	-18.41 ↓
Rwanda	Rice	National Average, Retail, RWF/Kg	1,200.00	0.00 ●	-2.49 ↘	8.72 ↑	0.17 ▲
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	230,000.00	-2.82 ↘	-12.78 ↓	-10.89 ↓	-21.98 ↓

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 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 Countries¹⁴



Kenya's beans (Yellow-Green) price, US\$1,224/Mt, is the highest in the region compared to Rwanda's US\$481/Mt, which is the cheapest. The price spread between Rwanda and the rest of the monitored countries is quite significant, ranging from US\$411/Mt in Tanzania to US\$743/Mt in Kenya. Unlike beans (Yellow-Green) prices, which depict declines over the past 1-12 months, Kenya's Wairimu beans price (Table 6) have had a high upward surge compared to the past 1-6 months. This is due to low initial stocks despite a good harvest coupled with high domestic demand and conflict-related trade disruptions.¹⁵ The price of Rwanda's beans has also had a 10.46% uptick compared to the previous month but significantly lower by 47.61% and 56.31% than the levels seen 6 and 12 months ago respectively. Largely, the national average prices of beans in Tanzania and Uganda remain lower than in the past 1-12 months.

¹¹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹² The East Africa Cross-Border Trade Bulletin, Volume 45, April 2024

¹³ Author's construction based on 1) FAO data for Rwanda, 2) national MIS Kenya & Tanzania

¹⁴ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁵ The East Africa Cross-Border Trade Bulletin, Volume 45, April 2024

Table 6: Percentage Changes in Beans Prices in East Africa¹⁶

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG*	163.52	-4.92 📉	0.80 ▲	-13.47 📉	-14.21 📉
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG*	189.22	47.06 📈	54.92 📈	21.34 📈	-17.77 📉
Rwanda	Beans	National Average, Retail, RWF/Kg	615.00	10.46 📈	-10.28 📉	-47.61 📉	-56.31 📉
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	3,663.80	-0.49 📉	0.11 ▲	-14.96 📉	-10.89 📉

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

Wheat Prices

Overall, wheat prices remain elevated across the East African region, except in Ethiopia where the current price is 4.99% and 10.37% lower than the past 3 and 6 months respectively. In Kenya, the price of wheat has seen a high rise, ranging from 15% to 59% over the past 1-6 months but remains 28.35% below the one-year level. In South Sudan, the price of wheat flour has also increased significantly compared to the past 1-12 months, being 191.49% higher than the one-year level. Conflicts, high returnees from Sudan, as well as poor macroeconomic conditions, continue to drive higher prices in South Sudan.

Table 7: Percentage Changes in Wheat prices in East Africa¹³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg*	3,945.00	0.57 ▲	-4.99 📉	-10.37 📉	21.20 📈
Kenya	Wheat	National Average, Retail, KES/KG*	81.31	15.41 📈	35.52 📈	59.44 📈	-28.35 📉
South Sudan	Wheat (flour)	Juba, Retail, SSP/Kg*	3,425.00	9.38 📈	79.96 📈	127.39 📈	191.49 📈

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 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 mixed trends in the select East African countries (Table 8). In Kenya, the price of CAN fertilizer has declined by 60.8% and 23.01% compared to the past 1 and 3 months respectively but remains above its levels in the past 6 and 12 months. However, the price of DAP remain above the 1-12 levels while that of NPK is above the past 1-6 months despite the government's intervention in the distribution of subsidized fertilisers. Similarly, the prices of fertilisers in Uganda show mixed trends with CAN and DAP fertilizers generally showing an uptick in prices due to seasonal demands putting upward pressure on prices. The prices of fertilisers in Uganda, however, remain significantly lower than they were a year ago. In Rwanda, the prices of all types of fertilisers monitored show declining trends compared to the past 1-12 months.

¹⁶ Author's construction based on 1) FAO data for Rwanda & Uganda, 2) national MIS Kenya & Tanzania

¹³ Author's construction based on 1) FAO data for Rwanda, 2) national MIS Ethiopia & Kenya

Table 8: Percentage Changes in Fertiliser prices in East Africa¹⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG*	106.70	-60.80 ↓	-23.01 ↓	7.23 ↑	67.53 ×
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG*	232.56	16.11 ×	83.59 ×	6.57 ↑	59.16 ×
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG*	116.75	4.93 ▲	13.02 ↑	17.66 ×	-1.69 ↘
Rwanda	DAP	National Average USD/50KG	49.15	-0.77 ↘	-2.42 ↘	-6.59 ↓	-19.31 ↓
Rwanda	NPK 17-17-17	National Average USD/50KG	49.69	-0.76 ↘	-2.43 ↘	-6.62 ↓	-17.17 ↓
Rwanda	Urea	National Average USD/50KG	37.92	-0.76 ↘	-2.32 ↘	-6.51 ↓	-27.99 ↓
Uganda	AMMONIUM SULPHATE	National Average, Retail, UGX/Kg	160,000.00	0.00 ●	0.00 ●	0.00 ●	-8.57 ↓
Uganda	CAN	National Average, Retail, UGX/Kg	115,000.00	9.52 ↑	4.55 ▲	-8.00 ↓	-34.66 ↓
Uganda	DAP	National Average, Retail, UGX/Kg	180,000.00	5.88 ↑	20.00 ×	20.00 ×	-21.74 ↓
Uganda	Urea	National Average, Retail, UGX/Kg	135,000.00	0.00 ●	3.85 ▲	3.85 ▲	-31.82 ↓

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 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 **Ethiopia**, planting for the February–May cropping season is mostly complete with generally favourable rains in cropping areas of central, southern, and northern Ethiopia.¹⁹ In **Kenya**, a delayed start of the March–May long rain season has been recorded across most part of the country. However, the start of the rains has been recorded with heavier than normal rains which is threatening planting and cropping conditions in some parts of the country. In **Uganda**, delayed and below-average start to the March to May rains has affected land preparation and planting activities in bimodal areas. However, forecasts indicate cumulative rainfall will be above average and will support average cereal production country wide.²⁰ In **Tanzania**, overall conditions remain favorable throughout the country, with the planting and development of Masika season cereals continuing for harvest from May, while the central and southern unimodal areas, the Msimu season cereals are in vegetative to reproductive stage for harvest from April. The planting of Season B maize crops is underway in **Rwanda** and **Burundi**, although there is concern of initial sowing conditions and crop emergence due to below-normal March precipitation performance with the rains not yet effectively started in most areas of these countries²¹.

¹⁸ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya; 3) AFAP for Uganda

¹⁹ <https://fews.net/east-africa/ethiopia>

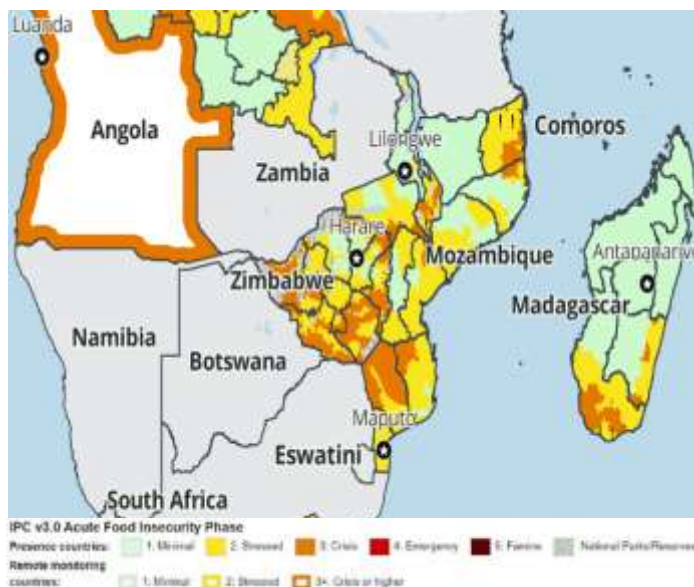
²⁰ <https://fews.net/east-africa/uganda>

²¹ Crop Monitor for Early Warning, No. 92–April 2024

Southern Africa Food Security Update

Food Security Outlook

Figure 8: Southern Africa Countries Food Security Outlook, February - May 2024



In Southern Africa, food insecurity concerns persist in typical deficit production areas of southern Zimbabwe, Mozambique, Malawi, Madagascar, eastern and northern DRC driven by the El Niño-induced drought, macroeconomic shocks, and in the DRC and northern Mozambique by conflict.²² Countries such as Zambia, Zimbabwe, Malawi are the most affected. Preliminary estimates show a regional deficit of about 5 million Mt of maize grain, with Zambia and Malawi needing about 1.6 million Mt. South Africa and Tanzania are projected to be the main source of imports in the region but are unlikely to meet this deficit due to expected drop in harvests in South Africa.

In **Malawi**, Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes persist across the country due to improvements in food supplies from ongoing harvests and humanitarian

assistance. However, Crisis (IPC Phase 3) outcomes are expected in most southern areas due to the effects of El Niño and dry spells leading to below-average harvests.²³ In **Mozambique**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes persist in conflict affected areas and due to a slow start of the 2024 main season harvest due to multiple shocks that affected the agricultural season. In **Zimbabwe**, Crisis (IPC Phase 3) outcomes are expected in typical deficit-producing areas in the south, east, west, and extreme north. Whereas Stressed (IPC Phase 2) outcomes may persist in typical surplus-producing areas.

Prevalence of insufficient food consumption

As of 30th April 2024, 23.2 million people across the four selected Southern African countries (see Table 9) did not have sufficient food for consumption, which is the same level seen in March 2024 (22.8 million). Nonetheless, the current level of food insecure people is higher than it was last year (20.6 million) and in 2022 (19.8 million). Table 9 below provides updates on variations in the prevalence of insufficient food consumption across the selected Southern African countries in April 2024.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (February 2024)²⁴

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	21.43	161.54
Mozambique	29.50	7.60	7.60	25.76	0.00	-7.32	-22.45
Zambia	17.40	3.30	3.30	18.97	0.00	-10.81	26.92
Zimbabwe	15.20	5.50	5.50	36.18	0.00	77.42	14.58

*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%)




²² <https://fews.net/southern-africa>

²³ <https://fews.net/southern-africa/malawi>

²⁴ 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 prices as the harvest season kicks-in, despite the expected below-average harvests.
	Weather Shocks	The aftermath of the cyclone, drought shocks, and heavy flooding early in the planting season led to below-average harvests from the previous season, resulting in sustained higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, caused by forex shortages, high food inflation, and high debt repayments, are sustaining higher food prices.

Maize

Figure 9: National average price spreads for maize across select Southern African Countries²⁵

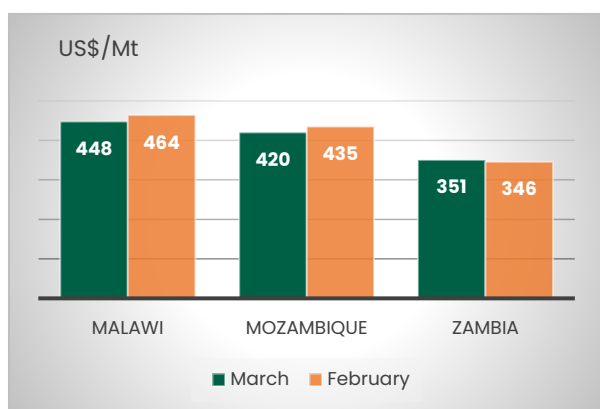


Figure 9 presents the price spread of maize in southern Africa with Malawi being US\$97/Mt higher than Zambia, which is the cheapest among the three countries being monitored. Overall, the prices of maize grain in the region have begun to drop over the past one month as new harvests trickle in across all selected markets (Table 10). Nonetheless, the current prices remain well above their levels in the past 3-12 months. The prices of maize remain particularly elevated in Zambia and Zimbabwe, with Zimbabwe registering 984% above its one-year level. In Zambia, the continued increase in maize price is attributed to continued currency weakness which is playing a key role in driving up prices, while the drought conditions and the impact on domestic maize production being anticipated to exert strong upward pressure on prices in near future.

Table 10: Percentage Changes in maize prices in Southern Africa²⁶

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Lilongwe, MWK/Kg	862.50	-4.17 ↘	7.81 ↑	23.21 ⊗	35.29 ⊗
Malawi	Maize	Liwonde, MWK/Kg	813.00	-1.81 ↘	-4.52 ↘	6.14 ↑	6.69 ↑
Malawi	Maize	Mzimba, MWK/Kg	671.00	-1.03 ↘	5.73 ↑	13.78 ↑	12.82 ↑
Malawi	Maize	Mzuzu, MWK/Kg	664.00	-2.21 ↘	7.44 ↑	11.55 ↑	-3.24 ↘
Malawi	Maize	National Average, MWK/Kg	770.00	-3.51 ↘	5.41 ↑	10.47 ↑	10.55 ↑
Malawi	Maize	Nsanje, MWK/Kg	881.00	-1.01 ↘	16.52 ⊗	28.10 ⊗	9.85 ↑
Mozambique	Maize (white)	Maputo, Retail, MZN/Kg	34.00	-0.85 ↘	-0.85 ↘	19.01 ⊗	32.79 ⊗
Mozambique	Maize (white)	Montepuez, Retail, MZN/Kg	34.00	-0.85 ↘	19.01 ⊗	19.01 ⊗	25.25 ⊗
Mozambique	Maize (white)	National Average, Retail, MZN/Kg	26.57	-9.04 ↓	-3.40 ↘	-0.15 ↘	2.73 ▲
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	9.31	7.71 ↑	27.51 ⊗	54.76 ⊗	71.06 ⊗
Zimbabwe	Maize (white)	National Average, Retail, ZWL/Kg**	4,186.60	0.00 ●	64.67 ⊗	135.02 ⊗	984.61 ⊗

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 2023

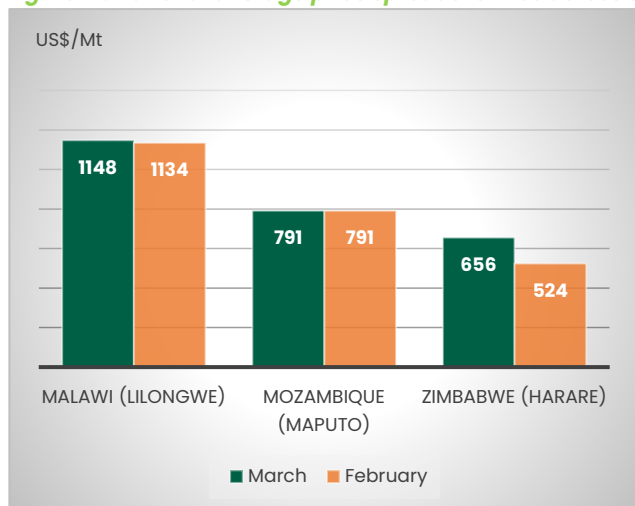
● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
 ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

²⁵ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²⁶ Author's construction based on FAO data

Rice

Figure 10: National average price spreads for rice across select Southern African Countries²⁷



Malawi remains the most expensive, at US\$1,148/Mt, followed by Mozambique (US\$791/Mt) and Zimbabwe (US\$656/Mt) in terms of the price of rice per metric ton in the Southern region (Figure 10). The price of rice has, however, begun to decline in the three monitored countries over the past month, except in Zimbabwe where it rose by 42.31%, due to ongoing harvests. Apart from Mozambique, where the price of rice remains largely stable or experienced low increase, all select markets of Malawi and Zimbabwe have recorded significant increases in the prices of rice compared to the past 3-12 months, with Zimbabwe recording between 42% and 90.4% higher price than they were 1-12 months ago.

Table 11: Percentage Changes in rice prices in Southern Africa²⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	Lilongwe, MWK/Kg	1,975.00	-1.25 ↓	9.72 ↑	23.44 ⊗	31.67 ⊗
Malawi	Rice	Mzuzu, MWK/Kg	1,906.25	-0.33 ↓	0.33 ▲	5.90 ↑	5.90 ↑
Mozambique	Rice (imported)	Maputo, Retail, MZN/Kg	50.00	0.00 ●	0.00 ●	-2.44 ↓	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	60.00	3.45 ▲	4.99 ▲	-1.15 ↓	1.57 ▲
Zimbabwe	Rice	Harare, Epworth, Retail, ZWL/Kg	22,200.00	42.31 ⊗	103.07 ⊗	219.52 ⊗	904.72 ⊗

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 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 remains mostly lower than they were 1-12 months ago. The price of urea is particularly lower by 15.86% and 15.43% than it was 6 and 12 months ago respectively. However, in Zambia, the prices of urea and NPK fertilisers remain elevated above their levels seen in the past 1-12 months. Compared to 6 months ago, NPK is 26% higher while urea is 21% higher.

Table 12: Percentage Changes in Fertiliser prices in Southern Africa²⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Mozambique	NPK 12-24-12	Nationa Average, MZN/50KG	2,858.00	-7.21 ↓	-7.84 ↓	-8.28 ↓	-7.27 ↓
Mozambique	NPK 23-10-5 +3S + 1Zn	Nationa Average, MZN/50KG	2,850.00	0.53 ▲	2.11 ▲	-2.03 ↓	-3.52 ↓
Mozambique	Urea	Nationa Average, MZN/50KG	2,828.00	-7.13 ↓	-10.05 ↓	-15.86 ↓	-15.43 ↓
Zambia	NPK 10-20-10 + 6S	National, ZMW/50KG	1,017.00	1.40 ▲	8.46 ↑	26.07 ⊗	11.60 ↑
Zambia	Urea	National, ZMW/50KG	1,009.00	2.68 ▲	10.23 ↑	21.03 ⊗	7.80 ↑

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%)

²⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²⁸ Author's construction based on FAO data

²⁹ Author's construction based on AfricaFertiliser.org

Seasonal Monitor and Cropping Conditions

Generally, the 2023/24 seasonal harvests have begun in the southern African region for areas not affected by the El Niño conditions, albeit woefully below average. In **Malawi**, the ongoing harvests are expected to be below-average, estimated at 2.2 million Mt by the private sector and development partners, due to the effects of El Niño and dry spells which has affected food production in 23 of 28 districts, impacting at least 2 million households. In addition, recent heavy rains and flooding have damaged matured crops and caused fatalities, loss of livelihoods, and infrastructure.³⁰ In **Mozambique**, a slow start to the 2024 main season harvest has been observed due to multiple shocks that affected the agricultural season.³¹ In **Zambia**, the El Niño driven drought has impacted 86 out of the country's 116 districts, with expected harvests of maize at about 1.8 million Mt. In **Zimbabwe**, delayed start of harvesting has been observed with most farmers anticipating a significantly below-average to failed harvest.³² In fact, estimates by the Government show that the harvest from the 2023–24 season may decline by 72% from last year due to the worst drought experienced in four decades as a result of the El Niño conditions.³³

³⁰ <https://fews.net/southern-africa/malawi>

³¹ [Crisis \(IPC Phase 3\) outcomes to persist in conflict and weather-shocked areas | FEWS NET](#)

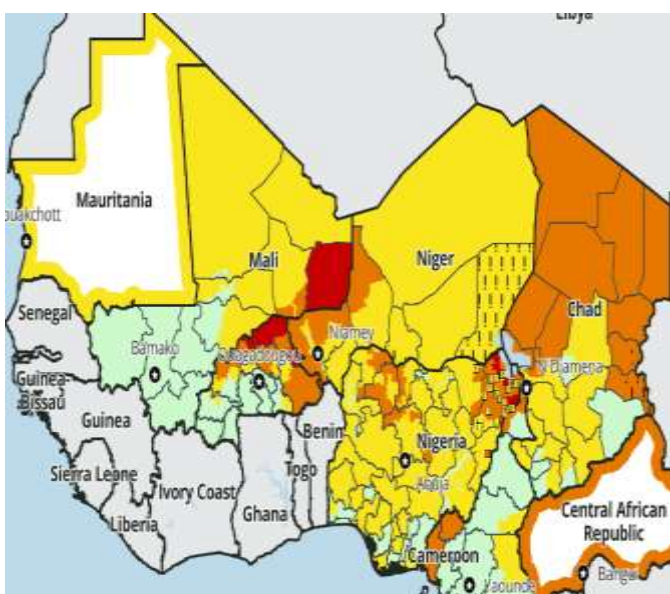
³² <https://fews.net/southern-africa/zimbabwe>

³³ https://www.news24.com/fin24/climate_future/news/worst-drought-in-four-decades-cuts-zimbabwean-maize-crop-by-72-20240508

West Africa Food Security Update

Food Security Outlook

Figure 11: West African countries Food Security Outlook, February – May 2024



In **Burkina Faso** Emergency (IPC Phase 4) outcomes persist in the northern region which is under blockage due to conflicts.³⁴ In **Niger**, Stressed (IPC Phase 2) conditions dominate food insecurity conditions across the country due largely to sufficient food assistance. However, in regions such as Tillabéry, Tahoua, Diffa, Liptako Gourma, and Maradi, Crisis (IPC Phase 3) conditions prevail driven by the depletion of food stocks and conflicts and insecurity which has disrupted agricultural and marketing activities.³⁵ In **Nigeria**, Crisis (IPC Phase 3) outcomes are expected to persist in the northern region due to escalating insecurity as well as poor macroeconomic conditions.³⁶ In **Mali**, Emergency (IPC Phase 4) outcomes prevail in Ménaka regions, while Crisis (IPC Phase 3) conditions are expected in the Gao and Mopti regions, driven by depletion of food stocks due to the early set in of the lean season as well as insecurity situation.³⁷

Prevalence of insufficient food consumption

As of 30th April 2024, 158.3 million people across seven selected West African countries had insufficient food for consumption, a decrease of 200,000 people over the previous month (see Table 13) signifying an improvement in the region's food security situation over the past month driven mainly by a decline in Ghana and Togo. The prevalence of insufficient food consumption in April 2024, however, remains above last year's (119.2 million people) and two years ago (106.1 million people).

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

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	2.75	6.67
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00	37.84	-3.77
Ghana	29.80	5.20	5.30	17.45	-1.89	-31.58	-8.77
Mali	19.10	13.20	13.20	69.11	0.00	0.00	20.00
Niger	25.90	21.40	21.40	82.63	0.00	40.79	40.79
Nigeria	202.80	100.40	100.40	49.51	0.00	52.35	78.33
Togo	7.90	1.80	1.90	22.78	-5.26	-33.33	-14.29

*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%)

³⁴ <https://fews.net/west-africa/burkina-faso>


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

³⁶ <https://fews.net/west-africa/nigeria>

³⁷ <https://fews.net/west-africa/mali>

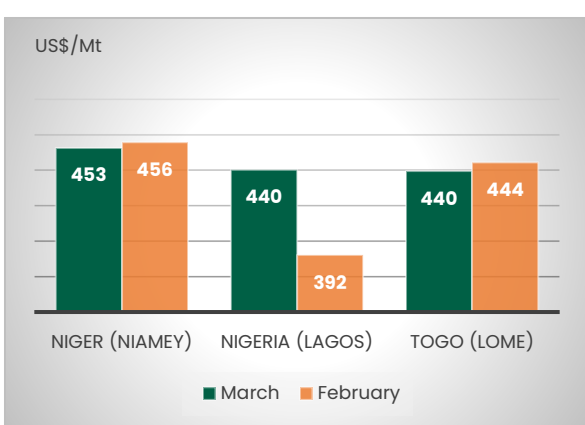
Commodity prices

Key drivers of the price movements in West Africa include³⁸

	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 changes in food supply, with early onset of the lean season in most countries in most West African are putting upward pressure on food prices.

Maize

Figure 12: Price spreads for Maize across select West African Countries³⁹



The price of maize appears similar in dollar terms across the three West African countries in figure 12, although Niger is US\$13 higher than Nigeria and Togo. In terms of changes in prices (Table 14), except Ghana, the prices of maize in the region remain largely elevated. The prices of maize remain particularly elevated in Nigeria, with current prices ranging from 134% to 159% above the 3-month level but 45–81% higher than the one-year level. The increase in staple food prices is mainly attributable to the ongoing lean season, conflict in surplus-producing areas, high cost of inputs and transportation, and the below average harvest.⁴⁰ In Togo, the prices of maize remained largely stable over the past month and largely lower than the one-year level.

Table 14: Percentage Changes in maize prices in West Africa⁴¹

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	390.00	8.33 ↑	8.33 ↑	2.63 ▲	14.71 ↑
Niger	Maize	Dosso, Retail, XOF/Kg	296.00	4.65 ▲	10.14 ↑	-8.70 ↓	31.25 ⊗
Niger	Maize	Niamey, Retail, XOF/Kg	277.00	10.49 ↑	16.18 ⊗	-16.84 ↓	25.40 ⊗
Niger	Maize	Tillaberi, Retail, XOF/Kg	323.00	6.51 ↑	24.14 ⊗	-6.98 ↓	21.62 ⊗
Niger	Maize	Zinder, Retail, XOF/Kg	290.00	-0.34 ↘	8.55 ↑	-15.12 ↓	15.87 ⊗
Nigeria	Maize (white)	Ibadan, NGN/KG**	655.00	12.93 ↑	139.75 ⊗	144.04 ⊗	79.95 ⊗
Nigeria	Maize (white)	Kano, NGN/KG**	589.35	13.55 ↑	157.81 ⊗	138.22 ⊗	80.36 ⊗
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	547.25	8.15 ↑	134.75 ⊗	128.36 ⊗	57.65 ⊗
Nigeria	Maize (white)	Lagos, NGN/KG**	588.50	7.78 ↑	138.45 ⊗	121.91 ⊗	45.67 ⊗
Nigeria	Maize (white)	Maiduguri, NGN/KG**	550.00	12.24 ↑	157.01 ⊗	125.41 ⊗	55.37 ⊗
Togo	Maize (white)	Amegnran, XOF/Kg	255.00	0.00 ●	11.11 ↑	11.11 ↑	-3.85 ↘
Togo	Maize (white)	Anie, XOF/Kg	240.00	0.00 ●	16.28 ⊗	16.28 ⊗	2.04 ▲
Togo	Maize (white)	Cinkassé, XOF/Kg	250.00	0.00 ●	13.64 ↑	11.11 ↑	-3.85 ↘
Togo	Maize (white)	Kara, XOF/Kg	250.00	1.96 ▲	4.00 ▲	-10.34 ↓	-3.35 ↘
Togo	Maize (white)	Korbongou, XOF/Kg	247.00	0.00 ●	11.36 ↑	11.36 ↑	-5.77 ↓
Togo	Maize (white)	Lomé, XOF/Kg	270.00	0.00 ●	9.80 ↑	-0.37 ↘	0.00 ●

³⁸ Fewsnet 2024

³⁹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴⁰ <https://fews.net/west-africa/nigeria>

⁴¹ Author's construction based on FAO data

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

Rice

Figure 13: Price spreads for rice across select West African Countries⁴²

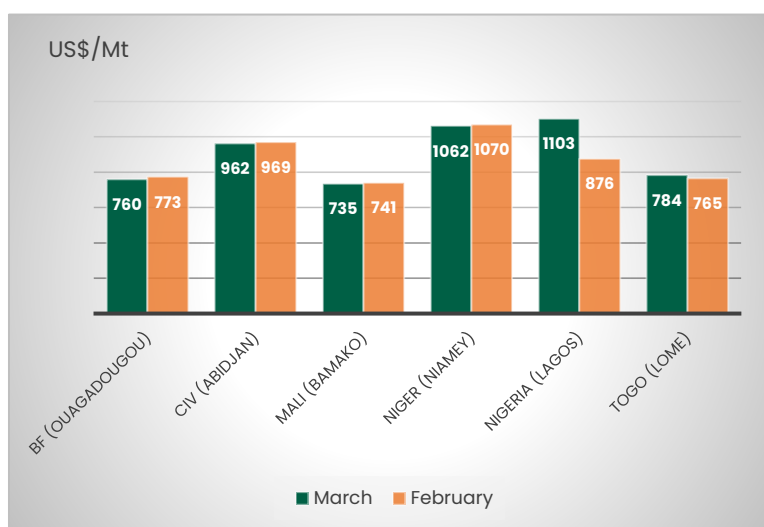


Figure 13 presents the price spread for rice across select West African countries, showing that the price of rice is cheaper in Mali (US\$735/Mt) and most expensive in Nigeria (US\$1,103/Mt). With regard to changes in prices (Table 15), mixed trends are observed. Compared to the previous month, except Nigeria, the prices of rice remain mostly stable in majority of select markets but declined in Ouagadougou and Kumasi and showed a significant increase of 18.2% in Tamale. In Nigeria, the price of rice is well above the levels seen in the past 1-12 months, with Ibadan registering 127.76% above the three-month level.

Table 15: Percentage Changes in rice prices in West Africa⁴³

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 ●	0.00 ●	0.00 ●	0.00 ●
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg*	55,000.00	1.85 ▲	14.58 ↑	22.22 ⊗	30.95 ⊗
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg*	42,000.00	0.00 ●	0.00 ●	0.00 ●	0.00 ●
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg*	46,500.00	-1.06 ▾	1.09 ▲	19.23 ⊗	13.41 ↑
Cote d'Ivoire	Rice (imported)	Abidjan, Retail, XOF/Kg**	503.00	0.00 ●	0.60 ▲	4.36 ▲	11.53 ↑
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 (imported)	Tamale, Rice (imported), Retail, Ghc/KG***	6.95	18.20 ⊗	10.70 ↑	-41.83 ▼	-60.16 ▼
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG*	44,000.00	2.33 ▲	2.33 ▲	2.33 ▲	2.33 ▲
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG*	60,000.00	0.00 ●	0.00 ●	-14.29 ▼	33.33 ⊗
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG*	45,000.00	1.12 ▲	0.00 ●	12.50 ↑	-5.26 ▼
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG*	45,000.00	0.00 ●	2.27 ▲	2.27 ▲	7.14 ↑
Niger	Rice (imported)	Agadez, Retail, XOF/Kg	713.00	0.00 ●	0.00 ●	16.67 ⊗	40.00 ⊗
Niger	Rice (imported)	Dosso, Retail, XOF/Kg	675.00	0.00 ●	0.00 ●	12.00 ↑	40.00 ⊗
Niger	Rice (imported)	Niamey, Retail, XOF/Kg	650.00	0.00 ●	0.00 ●	9.43 ↑	30.00 ⊗
Nigeria	Rice (imported)	Ibadan, NGN/KG**	1,485.00	17.86 ⊗	127.76 ⊗	120.33 ⊗	51.41 ⊗
Nigeria	Rice (imported)	Lagos, NGN/KG**	1,474.00	12.35 ↑	68.19 ⊗	82.61 ⊗	40.76 ⊗
Nigeria	Rice (imported)	Maiduguri, NGN/KG**	1,425.00	16.80 ⊗	69.24 ⊗	76.36 ⊗	37.02 ⊗
Togo	Rice (imported)	Amegnran, XOF/Kg	505.00	2.08 ▲	-9.26 ▼	-14.04 ▼	-12.50 ▼
Togo	Rice (imported)	Cinkassé, XOF/Kg	460.00	0.00 ●	-4.08 ▾	1.08 ▲	2.17 ▲
Togo	Rice (imported)	Lomé, XOF/Kg	465.00	0.00 ●	-4.95 ▾	-2.04 ▾	4.35 ▲

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 2023

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

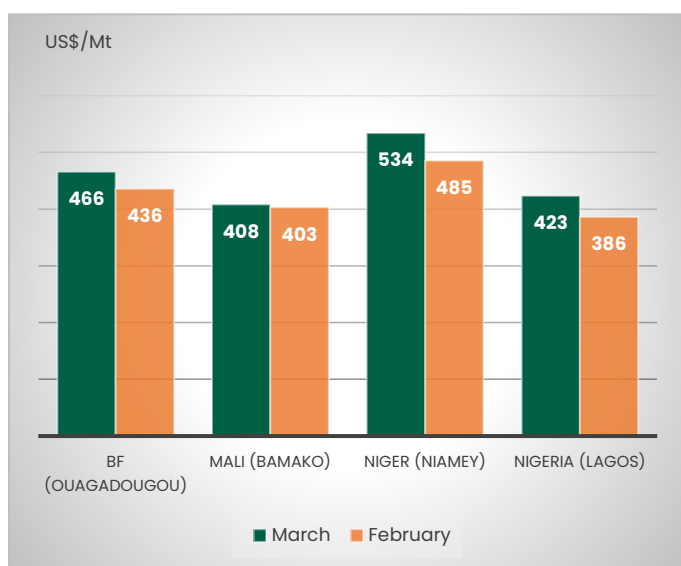
▾ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

⁴² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴³ Author's construction based on FAO data

Millet

Figure 14: Price spreads for rice across select West African Countries⁴⁴



In Figure 14, the price spread for millet across select West African countries shows that Niger is the most expensive (US\$534/Mt) while Mali is the cheapest (US\$408/Mt). These prices, however, remain above their levels seen 1-12 months ago in most select markets across the region (Table 16). In select markets of Burkina Faso, only Bobo Dioulasso registered stable prices, while in Ghana, millet prices were generally lower except in Kumasi and Tamale where the prices were higher than they were 1-3 months ago. Millet prices in Mali remained stable/declined only in Kayes, while in Niger and Nigeria, prices remain largely elevated compared to the past 1-12 months. Seasonal declines in stocks as these countries enter their lean season, conflicts, and weak macroeconomic conditions continue to put upward pressure on grain prices.

Table 16: Percentage Changes in millet prices in Ghana⁴⁵

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	0.00	-8.45	-10.96
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg*	35,000.00	4.48	6.06	0.00	11.11
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg*	28,000.00	7.69	7.69	3.70	3.70
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg*	28,500.00	7.55	7.55	3.64	0.00
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	Sekondi/Takoradi, Retail, Ghc/KG***	4.89	-0.50	-1.39	-61.06	-51.82
Ghana	Millet	Tamale, Retail, Ghc/KG***	4.28	19.01	15.42	-50.25	-53.08
Mali	Millet	Bamako, Wholesale, XOF/100 KG*	25,000.00	2.04	21.95	4.17	-9.09
Mali	Millet	Kayes, Wholesale, XOF/100 KG*	27,000.00	0.00	0.00	-6.90	-10.00
Mali	Millet	Mopti, Wholesale, XOF/100 KG*	27,500.00	5.77	19.57	17.02	-5.17
Mali	Millet	Ségou, Wholesale, XOF/100 KG*	21,000.00	13.51	15.07	10.53	-16.00
Mali	Millet	Sikasso, Wholesale, XOF/100 KG*	25,000.00	0.00	11.11	31.58	4.17
Niger	Millet	Agadez, Retail, XOF/Kg	298.00	3.36	4.05	-8.33	-6.95
Niger	Millet	Dosso, Retail, XOF/Kg	275.00	10.80	14.80	-3.64	22.31
Niger	Millet	Niamey, Retail, XOF/Kg	295.00	3.81	18.91	-10.41	8.64
Nigeria	Millet	Kano, NGN/KG**	569.53	11.78	123.10	109.58	54.97
Nigeria	Millet	Kaura Namoda, NGN/KG**	532.25	4.36	102.44	113.65	46.19
Nigeria	Millet	Lagos, NGN/KG**	566.00	5.20	99.30	81.41	14.76
Nigeria	Millet	Maiduguri, NGN/KG**	547.50	7.35	133.97	120.77	49.59

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 2023

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

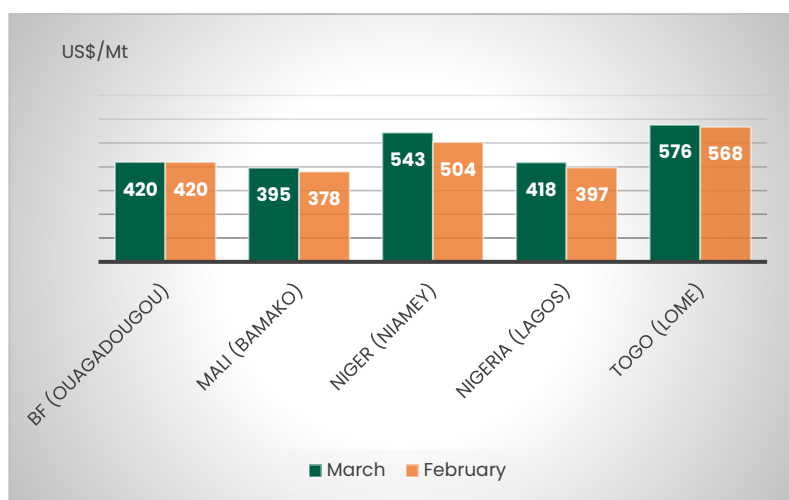
▾ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

⁴⁴ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴⁵ Author's construction based on FAO data

Sorghum

Figure 15: Price spreads for sorghum across select West African Countries⁴⁶



The price of sorghum is higher in Togo (US\$576/Mt) and lower in Mali (US\$395/Mt) than in other select West African countries (Figure 15). However, in Table 17, the price of sorghum in Togo is generally lower or stable compared to the past 1-12 months. In Nigeria, the price of sorghum remains elevated in all the select markets, ranging from 2.4% to 183.24% compared to the past 1-6 months, driven by seasonal patterns, conflicts, and poor macroeconomic conditions. Mixed trends are, however, observed in Burkina Faso, Ghana, Mali, and Niger.

Table 17: Percentage Changes in prices in Mali⁴⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg*	23,000.00	-8.00 ↓	4.55 ▲	2.22 ▲	0.00 ●
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg*	32,000.00	12.28 ↑	16.36 ⊗	6.67 ↑	20.75 ⊗
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg*	25,500.00	0.00 ●	15.91 ⊗	15.91 ⊗	10.87 ↑
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	Sekondi/Takoradi, Retail, Ghc/KG***	4.64	0.00 ▲	0.63 ▲	-63.09 ↓	-54.10 ↓
Ghana	Sorghum	Tamale, Retail, Ghc/KG***	4.26	13.99 ↑	10.63 ↑	-45.21 ↓	-47.83 ↓
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG*	24,000.00	4.35 ▲	26.32 ⊗	4.35 ▲	4.35 ▲
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG*	25,000.00	0.00 ●	8.70 ↑	13.64 ↑	8.70 ↑
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG*	21,000.00	0.00 ●	6.33 ↑	5.00	-16.00 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG*	21,000.00	0.00 ●	16.67 ⊗	5.00	-6.67 ↓
Niger	Sorghum	Agadez, Retail, XOF/Kg	300.00	-3.73 ▾	3.33 ▲	-8.01 ↓	-5.20 ↓
Niger	Sorghum	Dosso, Retail, XOF/Kg	318.00	6.71 ↑	-1.96 ▾	-2.78 ▾	25.00 ⊗
Niger	Sorghum	Niamey, Retail, XOF/Kg	306.00	4.10 ▲	13.79 ↑	-7.30 ↓	12.63 ↑
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	655.00	13.72 ↑	133.93 ⊗	133.93 ⊗	-2.24 ▾
Nigeria	Sorghum (white)	Kano, NGN/KG**	464.35	5.70 ↑	113.51 ⊗	104.43 ⊗	4.74 ▲
Nigeria	Sorghum (white)	Lagos, NGN/KG**	582.00	5.43 ↑	107.41 ⊗	104.35 ⊗	-13.29 ↓
Nigeria	Sorghum (white)	Maiduguri, NGN/KG**	532.50	2.40 ▲	183.24 ⊗	156.01 ⊗	35.84 ⊗
Togo	Sorghum	Cinkassé, XOF/Kg	275.00	0.00 ●	-18.57 ↓	-9.52 ↓	-1.72 ▾
Togo	Sorghum	Korbongou, XOF/Kg	275.00	0.00 ●	-17.14 ↓	-17.14 ↓	0.00 ●
Togo	Sorghum	Lomé, XOF/Kg	345.00	1.45 ▲	-25.53 ↓	-24.73 ↓	4.48 ▲

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 2023

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⁴⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴⁷ Author's construction based on FAO data

Fertiliser

Overall, the prices of monitored fertiliser types across the selected West African countries show lower trends compared to the past 1-12 months (Table 18). However, compared to the previous month, the price of all types of fertilisers remains 7.9% to 24.25% higher in Nigeria, while a few markets in Cote d'Ivoire and Ghana have also experienced low increases.

Table 18: Percentage Changes in Fertiliser Prices in West Africa⁴⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG	34.18	0.71 ▲	-10.27 ↓	-13.29 ↓	-18.95 ↓
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG	36.72	0.69 ▲	-4.72 ▾	-8.97 ↓	-10.66 ↓
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG	33.41	-1.74 ▾	-6.94 ↓	-12.77 ↓	-17.89 ↓
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	30.18	24.25 ⊗	-7.90 ↓	-14.58 ↓	-47.26 ↓
Nigeria	NPK 20-10-10	National, USD/50KG	24.38	11.02 ↑	-18.57 ↓	-24.19 ↓	-53.40 ↓
Nigeria	Urea	National, USD/50KG	26.10	7.90 ↑	-9.12 ↓	0.15 ▲	-36.70 ↓

Note: Last price is for March 2024, *April 2024, **February 2023, and ***January 2023

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
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Seasonal Monitor and Cropping Conditions

In Niger, market gardening activities and land preparation for main season cropping are ongoing.⁴⁹ In Nigeria, the onset of the February/March rainy season in bimodal areas of the south is supporting planting of maize, cassava, and yams, while the season is expected to start on time in May-June in the central states and June-July in the north.

⁴⁸ Author's construction based on AfricaFertiliser.org

⁴⁹ <https://fews.net/west-africa/niger>

Food Trade Updates

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



Uganda/Kenya

- The Uganda Revenue Authority (URA) has increased the withholding tax on the import of Irish potatoes from Kenya by up to 10 times, i.e. from Ush9 (\$0.0024) to Ush93.6 (\$0.025) per kilo (source: The East Africa).
- The government of Kenya is to increase the number of milk importation permits to more milk powder from Uganda which they have been restricting to be landed on their market. (source: The East Africa)

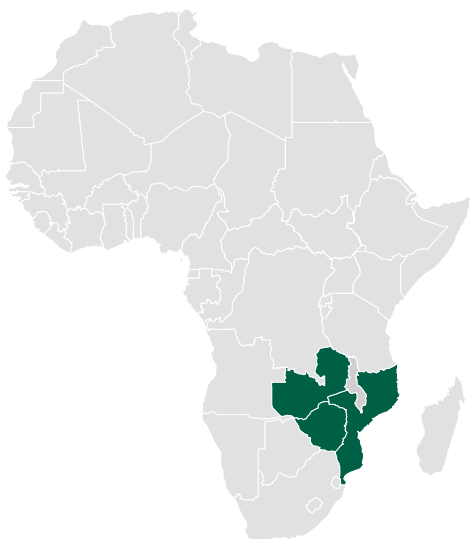
South Sudan

The government of South Sudan has levied \$350 on importers and exporters of cargo destined to or originating from South Sudan for a mandatory tracking system known as Electronic Cargo Tracking Note (ECTN) (source: The East Africa).

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



Tanzania

Tanzania and Ethiopia signed bilateral agreements targeting agriculture, trade, energy and air transport and aviation technology exchange.

Zimbabwe

The government of Zimbabwe has given permission for the private sector to import about 1 million Mt of grains to meet shortfalls from its current stocks and production.

Zambia

- The government of Zambia has suspended import duty of 15% and surtax of 5% on importation of maize to zero. This policy measure is to incentivize the private sector to participate in the importation of the grain against the eminent food shortage at the back of the El Nino-induced drought.
- The government of Zambia is expected to sign and ratify the Beira Development Corridor Agreement (BDCA) alongside the DRC, Malawi, Mozambique, and Zimbabwe. The BDCA is expected to promote and facilitate infrastructure development, transit-transport cooperation and cross border trade among the five Contracting States.

West Africa

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

Figure 19: West Africa Cross Border Trade Updates March 2024



Nigeria

The Government of Nigeria has launched its 'Advanced Ruling' system which is a critical mechanism that allows traders to obtain binding decisions from Customs administrations on the classification, origin, and valuation of goods before importation.

Nigeria has become the 16th nation to accede to the Establishment Agreement for the Fund for Export Development in Africa (FEDA), the development impact investment platform of the African Export-Import Bank (Afreximbank). This underscores the increasing backing the Fund enjoys among African nations.



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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