AGRA
Sustainably Growing Africa's Food Systems

BILL & MELINDA GATES foundation

The ROCKEFELLER FOUNDATION

UKaid
from the British people

USAID
FROM THE AMERICAN PEOPLE

FOOD SECURITY MONITOR

EDITION 47 • MAY 2024

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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.

The Food Security Monitor is produced with support from the UK Government's Foreign, Commonwealth & Development Office (FCDO) through the Africa Food Trade & Resilience Programme.

Table of Contents

Summary

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

Food Security Updates

The Southern African Development Community (SADC) has launched a Regional Humanitarian Appeal of at least US$5.5 billion to support over 61 million people affected by the El Niño induced Drought and Floods. Ongoing harvests in the southern African region are driving prices down and supporting improved food security. However, the situation is expected to deteriorate after the next 2-3 months due to the severe below-average harvests caused by the El Nino driven drought which affected most of the southern African countries. Overall, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) conditions persist across the southern African countries.

Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persist across the **Eastern Africa**, region, particularly in Ethiopia and South Sudan. However, most parts of Kenya and Uganda are experiencing Stressed (IPC Phase 2) outcomes due to improved access to food as a result of declining maize prices driven by increased food supplies from the past harvests.

In **West Africa**, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes mostly prevail across the region driven by poor macroeconomic conditions, conflicts and insecurity, early onset of the lean season with its attendant high food prices. However, a small proportion of the population in the northern region of Mali are predicted to be facing a Catastrophe situation (IPC Phase 5) due to insecurity concerns and the impact of the ongoing lean season.

Food Commodity Prices Updates

Generally, the prices of grains have remained low in the **East African** region over the past 1-12 months, except for South Sudan marred by deteriorating macro-economic conditions and rising conflict incidents that are disrupting livelihoods, trade, and food assistance delivery. In **Southern Africa**, the prices of monitored commodities (maize and rice) have declined or remained stable in most countries over the past month due to ongoing harvests. However, the impact of the El Niño-linked drought on regional agricultural production in 2024 and consequently cereal supplies, is expected to be a key driver of inflationary pressure this year. In **West Africa,** the changes in grain prices show mixed trends, with many countries experiencing price increases. The prices of grains have remained higher compared to the past 12 months.

Food Trade Updates

- The government of Kenya has imposed a 2% levy on imports of maize, rice, wheat, beans, lentils, soybeans, and peanuts, and a 1% levy on imported potatoes, cassava, sweet potatoes, and yams. This is to take effect from 1st July 2024.
- The Southern African Development Community (SADC) has launched a Regional Humanitarian Appeal of at least US$5.5 billion to support over 61 million people affected by the El Niño induced Drought and Floods.
- The government of Zambia suspends tax on maize imports to address shortages caused by El Nino-induced drought affecting about 45% of the total maize area planted, with 84 out of the 116 districts directly affected.
- ECOWAS has launched the West African Competitiveness Observatory to Boost Regional Exports. The new online tool is designed to enable policymakers and businesses in West Africa to track their countries' trade competitiveness and to find new business opportunities in the region.

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 prices[2] over the past one year. Figure 1 displays the prevalence of IFC in May across 17 countries selected from Eastern, Southern, and Western Africa. During this month, the countries that are food insecurity hotspots (defined as countries where over 50% of the total population has IFC) remain the same as Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%) with Nigeria closing in at 49.5%. The number of people with IFC in May remained unchanged from April in most countries except in Ghana and Togo where it declined, and in Rwanda and South Sudan where it increased. Compared to a year ago, however, the number of people with IFC increased in Burkina Faso, Cote d'Ivoire, Kenya, Malawi, Niger, Nigeria, and Zimbabwe, while it declined in the remaining countries.

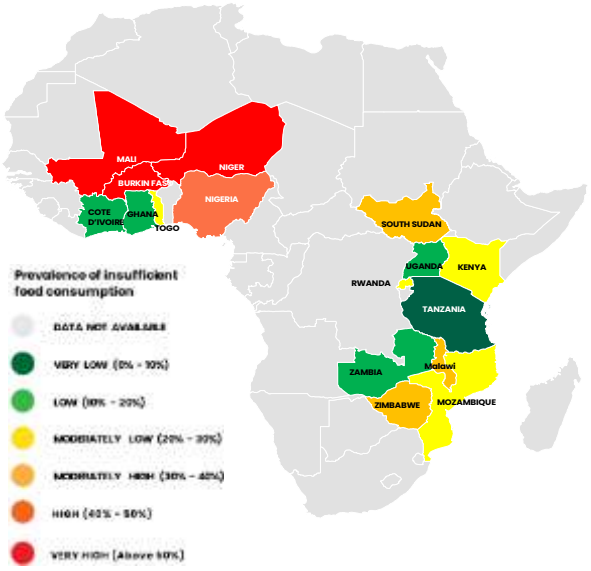
On the other hand, the national average maize prices declined in most countries compared to the past six months, except in Nigeria, South Sudan, Togo, and Zambia. The national average price of millet in Burkina Faso increased but remained unchanged in Mali. Compared to the past 12 months, the national average prices of maize declined in Kenya, Rwanda, Tanzania, Togo, and Uganda, while millet price also declined in Mali.

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	↑	10.21	↑	3.39	↑
Cote d'Ivoire	0.00	○	37.84	↑				
Ethiopia					-0.19	↓	15.45	↑
Ghana	-1.89	↓	-31.58	↓				
Kenya	0.00	○	11.48	↑	-44.46	↓	-14.61	↓
Malawi	0.00	○	21.43	↑	-0.14	↓	24.67	↑
Mali*	0.00	○	0.00	○	7.35	↑	-7.05	↓
Mozambique	0.00	○	-7.32	↓	-0.15	↓	2.73	↑
Niger	0.00	○	40.79	↑	-7.49	↓	22.85	↑
Nigeria	0.00	○	52.35	↑	160.58	↑	35.14	↑
Rwanda	3.85	↑	-10.00	↓	-37.84	↓	-26.66	↓
South Sudan	6.25	↑	-46.88	↓	82.08	↑	86.57	↑
Tanzania	0.00	○	-5.45	↓	-43.12	↓	-52.29	↓
Togo	-5.26	↓	-33.33	↓	11.73	↑	-0.40	↓
Uganda	0.00	○	-47.47	↓	-24.95	↓	-40.43	↓
Zambia	0.00	○	-10.81	↓	34.26	↑	64.77	↑
Zimbabwe	0.00	○	77.42	↑				

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 seven days before the survey, using standardized weights for each food group 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 tracked on this dashboard, except in Mali and Burkina Faso, where we use millet. The price changes presented here are average price changes over a number of selected markets, which implies that prices may actually be higher or lower in certain markets.

Global Market Update

The International Grain Council's (IGC) Grain and Oil Index (GOI) (Table 2) show a moderate uptick of 5.74%, supported by the uptick of all sub-indices with wheat and barley seeing the most surge of about 10%. The rise in the prices of grains is attributed to production shortfalls in major producers such as Russia.[3] Compared to the same period in 2023, however, the GOI is lower by 6.19%, which is supported by declines in wheat (4.41%), maize (19.42%), and soyabeans (8.69%). The sub-index of rice was, however, significantly higher by 25.66% over the past year.

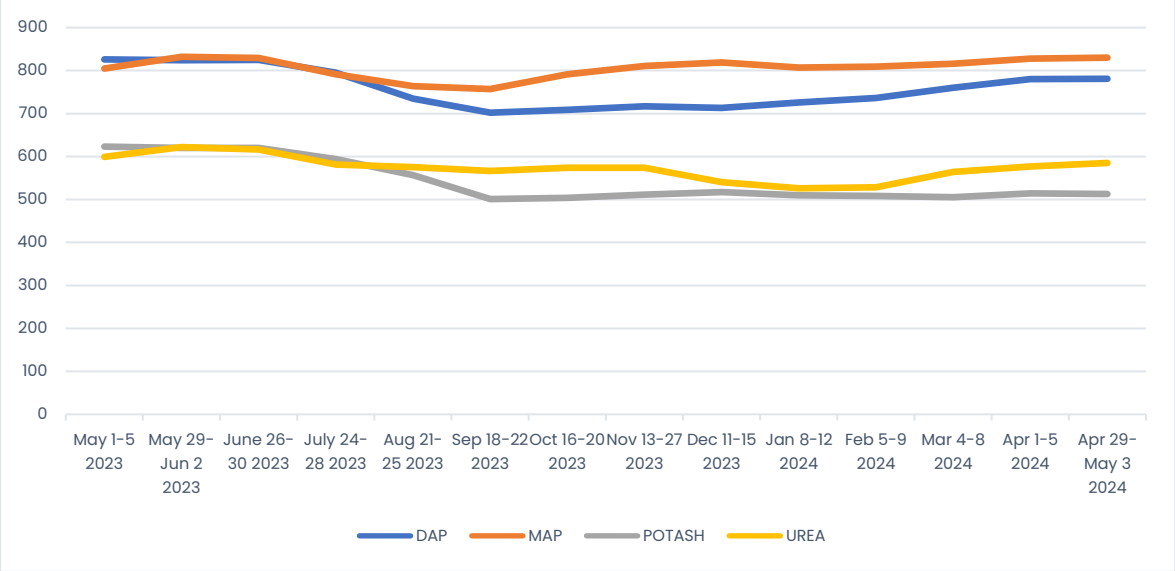
Table 2: IGC GOI Commodity Price Indices

Jan 2000 = 100	29-May	% Change 1M	% Change 1Y
GOI	243.67	*5.74*	*-6.19*
Wheat	231.06	*9.94*	*-4.41*
Maize	208.47	*0.92*	*-19.42*
Rice	258.52	*5.02*	*25.66*
Soyabeans	232.46	*5.11*	*-8.69*
Barley	235.52	*9.99*	*2.80*

Global Fertiliser Prices

All fertiliser types, except potash, have had a minor price uptick over the past month. On the other hand, compared to May 2023, all fertiliser types being monitored, except MAP, have declined. MAP rose by 3.1%, while DAP, Potash, and urea declined by 5.5%, 17.7%, and 2.3%, respectively.

Figure 2: Global Fertiliser Prices ($/ton)



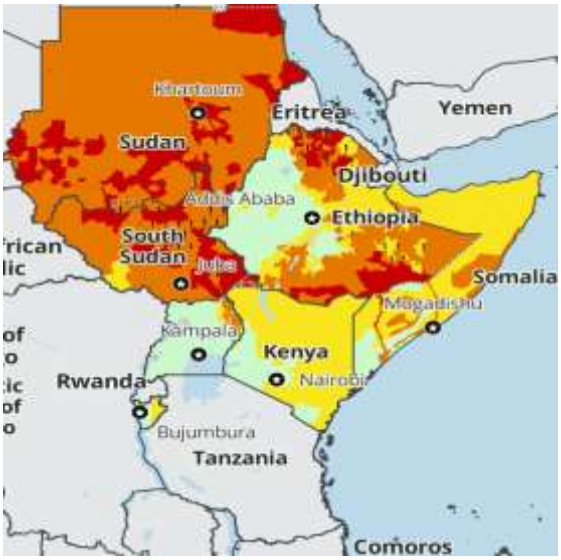
***Source**: Author's construction based on World Bank data[4]*

[3] https://www.marinelink.com/blogs/blog/international-wheat-buyers-wrongfooted-by-sharp-rally-in-rates-100894
[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 3: East African Countries Food Security Outlook, February - May 2024



In **Ethiopia,** Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persist across the country despite ongoing humanitarian food assistance. In **Kenya,** area-level Stressed (IPC Phase 2) outcomes prevailed supported by declining maize prices and recovery of livestock activities. Nonetheless, over 1.2 million people are still at risk of IPC phase 3 and above outcomes according to the Food Security & Nutrition Working Group (FSNWG) estimates for May 2024.

A combination of the impact of the lean season and returnees, conflicts, and macroeconomic conditions continue to drive widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes in **South Sudan.**[5] According to the FSNWG, over 7 million people are experiencing Crisis (IPC Phase 3) and above conditions in South Sudan, with 79,000 in a catastrophe situation. In **Uganda,** IPC 2 conditions are expected to prevail in most producing areas due to seasonal dipping of incomes and low carryover stocks from 2023, followed by first season harvests beginning in June. However, IPC 3 and 4 conditions prevail in certain parts of the country especially in Karamoja and refugee settlements.[6] However, over 1.3 million people are experiencing Crisis (IPC Phase 3) and Emergency (IPC Phase 4) conditions according to the FSNWG May estimates.

Prevalence of insufficient food consumption

As of 30th May 2024, the number of people across five selected East African countries (see Table 3) who did not have sufficient food for consumption was 32.9 million, a decline of 300,000 people from April. This signifies an improvement in food insecurity across these select countries, driven mainly by a decrease in Uganda. The current number of people with insufficient food for consumption is also lower than in May 2023 (37.2 million) and May 2022 (39.7 million). *Table 3 below* provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries in May 2024. Except Kenya, all other East African countries have registered declines in the prevalence of people with insufficient food consumption over the past 1-2 years.

Table 3: Prevalence of insufficient food consumption across selected East African countries (May 2024)[7]

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 ●	38.78 ↑	106.06 ↑
Rwanda	12.30	2.70	2.70	21.95	0.00 ●	-6.90 ↘	-6.90 ↘
South Sudan	11.00	3.60	3.40	32.73	5.88 ↗	-43.75 ↓	-42.86 ↓
Tanzania	56.30	5.20	5.20	9.24	0.00 ●	-3.70 ↘	-1.89 ↘
Uganda	42.70	7.80	8.30	18.27	-6.02 ↘	-48.68 ↓	-51.55 ↓

**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/south-sudan
[6] https://fews.net/east-africa/uganda
[7] Author's construction based on WFP HungerMap

Commodity Prices

Key drivers of commodity prices in EA[8]

	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 4: National average price spreads for Maize across select East African Countries[9]

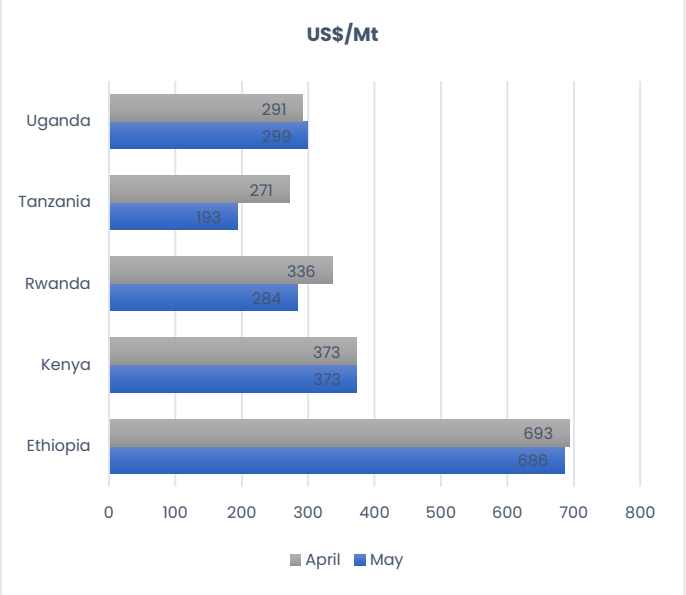


Figure 4 presents the national average price spreads for maize across select East African Countries. This shows that the price of maize is lowest in Tanzania in May at US$193/ton, attributed to adequate domestic availability and reduced export demand, and the most expensive in Ethiopia at US$686/ton. 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 South Sudan have shown a significant uptick over the past 1-12 months ranging from 14.92% to 86.57%. Also, despite a marginal decline in the price of maize in Ethiopia in May over April, the price level remains 15.45% higher than it was 12 months ago. 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.[10] The nation experienced a sharp depreciation of the national currency, because of a substantial reduction of oil exports due to damages to the pipelines passing through the Sudan and by disruptions in oil shipments via the Red Sea.[11]

Table 4: Percentage Changes in Maize Prices in East Africa[12]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg*	3,922.39	-0.57 ↘	-6.05 ↓	-0.19 ↘	15.45 ⊗
Kenya	Maize	National Average, Retail, KES/KG*	48.43	-2.82 ↘	3.94 ▲	-67.46 ↓	-49.96 ↓
Rwanda	Maize	National Average, Retail, RWF/Kg	365.37	-15.03 ↓	-22.67 ↓	-37.84 ↓	-26.66 ↓
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	1,051.93	14.92 ↑	55.44 ⊗	82.08 ⊗	86.57 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG*	50,000.00	0.00 ●	-31.82 ↓	-43.12 ↓	-52.29 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg	1,137.23	2.85 ▲	-8.99 ↓	-24.95 ↓	-40.43 ↓

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

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

[8] Fewsnet, 2024
[9] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[10] https://fews.net/east-africa/south-sudan
[11] FPMA Bulletin Food Price Monitoring and Analysis (FPMA) Bulletin #4, 13 May 2024 (fao.org)
[12] Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) national MIS Ethiopia, Kenya & Tanzania

Rice

Figure 5: National average price spreads for Rice across select East African Countries[13]

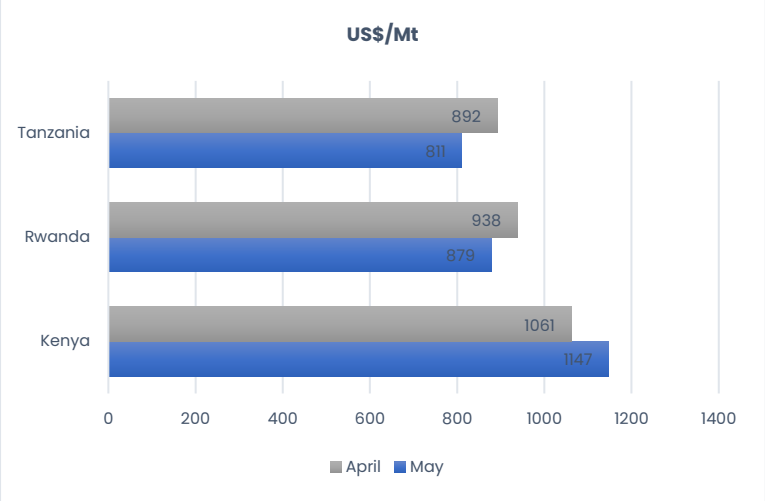


Figure 5, presents the price spread between East African countries, showing that the price of rice is most expensive in Kenya compared to Rwanda and Tanzania, with the latter having the lowest at US$811 per ton, mainly attributed to above-average rice harvests in December/January period[14]. From Table 5, rice prices in the three monitored East African countries generally show declining trends, except Kenya, which registered moderate to high increases of 4.97% and 15.32% over the past 1 and 3 months, respectively. Significant drops are seen in Kenya and Tanzania at 15.96% and 27.79%, respectively, compared to the past year.

Table 5: Percentage Changes in Rice prices in East Africa[15]

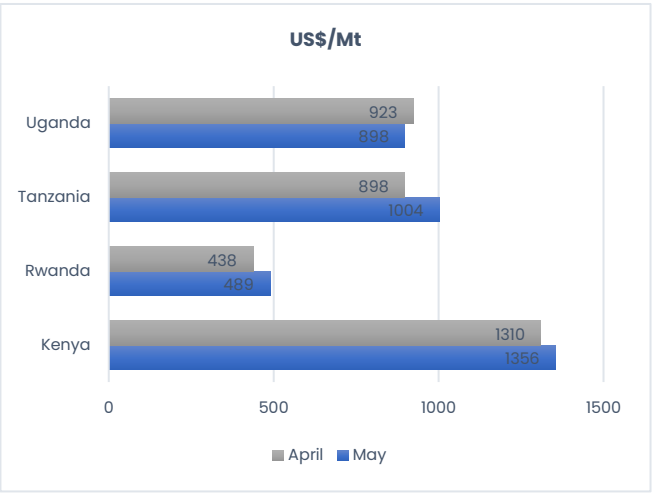
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG*	148.87	4.97	15.32	0.70	-15.96
Rwanda	Rice	National Average, Retail, RWF/Kg	1,129.17	-5.90	-5.90	-5.22	-2.97
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG*	210,000.00	0.00	-11.27	-21.35	-27.79

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

= 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 6: National average price spreads for Beans across select East African Countries[16]



Kenya's beans (Yellow-Green) price is the highest in the region at US$1,356/Mt compared to the cheapest recorded from Rwanda at US$489/Mt (Figure 6). The price spread between Rwanda and the rest of the monitored countries is quite significant, ranging from US$515/Mt in Tanzania to US$867/Mt in Kenya. Except in Uganda, bean prices increased over the past 1-3 months (Table 6) due to increased demand. Kenya's Yellow-Green beans and prices of beans in Rwanda and Tanzania remain below what they were 6-12 months ago. However, Kenya's red haricot beans remain well above what they were in the past 3-12 months. Beans prices in Uganda have experienced a significant drop of 4-26% over the past 1-12 months.

Table 6: Percentage Changes in Beans Prices in East Africa[17]

[13] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[14] The East Africa Cross-Border Trade Bulletin, Volume 45, April 2024

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

[16] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG*	175.92	7.59	9.17	-28.68	-13.00
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG*	196.07	3.62	63.70	31.19	26.11
Rwanda	Beans	National Average, Retail, RWF/Kg	628.33	2.17	15.32	-40.03	-53.59
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG*	260,000.00	4.00	4.00	-3.88	-6.81
Uganda	Beans	National Average, Retail, UGX/Kg	3,412.92	-6.85	-4.33	-20.55	-26.35

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

= 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, wheat flour prices have also increased significantly compared to the past 1-12 months, 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 Africa[18]

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 April 2024, *May 2024, **March 2024, and ***February 2024

= 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 fertiliser 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 remains 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 fertilisers 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 a year ago. In Rwanda, the prices of all types of fertilisers monitored show declining trends compared to the past 1-12 months. In the East African region, the demand for top-dressing fertilisers like Urea, CAN, and top-dressing blends is gradually increasing mainly attributed to the completion of planting by the farmers and now transiting to the top-dressing phase.

Table 8: Percentage Changes in Fertiliser prices in East Africa[19]

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

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

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 April 2024, *May 2024, **March 2024, and ***February 2024

= 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

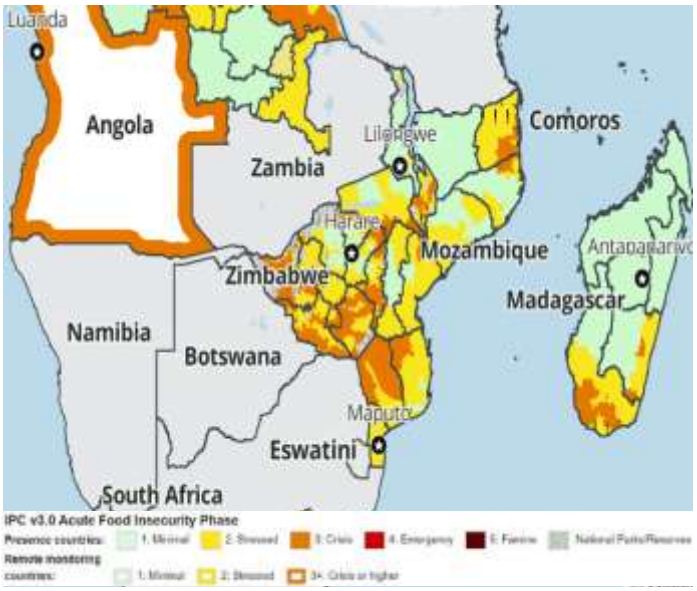
In **Ethiopia**, planting for the February-May cropping season is mostly complete with generally favourable rains in cropping areas of central, southern, and northern Ethiopia; however, rainfall was delayed, and some localized dry spells have occurred in March and April.[20] In **Kenya**, a delayed start of the March-May long rain season has been recorded across most parts of the country, although planting of long rains cereals is underway in all regions. It forecasted that heavy rains would continue through early May, increasing flood risks across different parts of the country and production losses across main producing areas. In **Uganda**, the delayed March to May rains have affected land preparation and planting activities in bimodal areas. However, forecasts indicate cumulative rainfall will be above average and will extend to June.[21] Harvesting of Msimu season cereals Is underway in central and southern unimodal areas of **Tanzania,** while cereals in the northern bimodal areas continue developing. The country has experienced heavy rains, resulting in flooding and landslides along parts of the coast and low-lying areas. The planting and development of Season B maize and rice crops is underway in **Rwanda** and **Burundi,** although there is concern of delayed seasonal rains.[22] However, Burundi has been affected by heavy rains, with around 40,000 hectares impacted by flooding.

[20] https://fews.net/east-africa/ethiopia
[21] https://fews.net/east-africa/uganda
[22] Crop Monitor for Early Warning, No. 92-April 2024

Southern Africa Food Security Update

Food Security Outlook

Figure 7: Southern Africa Countries Food Security Outlook, February - May 2024



In Southern Africa, over 61 million people are affected by the El Niño induced drought and floods.[23] In **Malawi**, several central Malawi districts and the northern region are experiencing Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes due to ongoing harvests. However, much of the southern region and some central districts that experienced the worst impacts of the prolonged El Niño–induced dry spells are anticipated to experience Crisis (IPC Phase 3). In addition, FEWSNET field assessments showed that 15-40% of households have no food from their production in the immediate post-harvest period, further exacerbating acute food insecurity.[24]

In **Mozambique**, Crisis (IPC Phase 3) persists in southern and central zones due to below-average harvests driven by the impacts of drought caused by the El Niño conditions. In **Zimbabwe**, Crisis (IPC Phase 3) conditions occur across the typical deficit-producing areas in the south, east, west, and extreme north, while Stressed (IPC Phase 2) area-level outcomes are anticipated in some typical surplus-producing parts. It Is estimated that 42 of the 60 rural districts in Zimbabwe will have just 0-3 months of cereal self-sufficiency for the 2024/25 consumption year due to the failed harvests.[25]

Prevalence of insufficient food consumption

As of 30th May 2024, the number of people who do not have sufficient food for consumption across four selected Southern African countries remained the same as in April, which is 23.2 million people (see Table 9). However, this number is above what was recorded in May 2023 (19.8 million) and May 2022 (18.3 million). Mixed trends are, however, observed compared to the past 1-2 years. *Table 9* below provides updates on variations in the prevalence of insufficient food consumption across the selected Southern African countries in May 2024.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (May 2024)[26]

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	44.68	142.86
Mozambique	29.50	7.60	7.60	25.76	0.00	-2.56	-10.59
Zambia	17.40	3.30	3.30	18.97	0.00	-5.71	57.14
Zimbabwe	15.20	5.50	5.50	36.18	0.00	44.74	12.24

**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%)

[23] https://www.sadc.int/latest-news/sadc-launches-us55-billion-regional-humanitarian-appeal-support-people-affected-el-nino
[24] https://fews.net/southern-africa/malawi
[25] https://fews.net/southern-africa/zimbabwe
[26] 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 higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, caused by forex shortages, high food inflation, and high debt repayments sustain higher food prices.

Maize

Figure 8: National average price spreads for maize across select Southern African Countries[27]

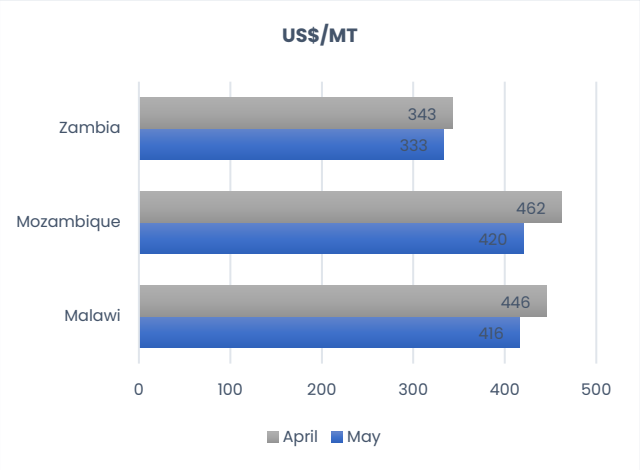


Figure 8 presents the price spread of maize in southern Africa, with Mozambique and Malawi having almost similar prices, with Zambia continuing having the lowest price at US$333/Mt, being the cheapest among the three countries being monitored. Overall, the prices of maize grain in the region have dropped over the past 1-3 months, except in a few markets, as new harvests trickle in across all selected markets (Table 10). Nonetheless, the current prices remain well above their levels in the past 6-12 months, 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 are anticipated to exert strong upward pressure on prices in the near future.

Table 10: Percentage Changes in maize prices in Southern Africa[28]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Lilongwe, MWK/Kg	900.00	0.00	12.50	28.57	41.18
Malawi	Maize	Liwonde, MWK/Kg	787.00	-2.96	-19.36	-6.20	20.75
Malawi	Maize	Mzimba, MWK/Kg	666.00	-1.33	-10.90	7.03	28.54
Malawi	Maize	Mzuzu, MWK/Kg	688.00	3.77	-6.04	14.48	4.56
Malawi	Maize	National Average, MWK/Kg	717.00	-6.64	-20.48	-0.14	24.67
Malawi	Maize	Nsanje, MWK/Kg	726.00	-16.93	-28.10	-2.19	63.98
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	9.05	-2.78	13.23	34.26	64.77

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

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

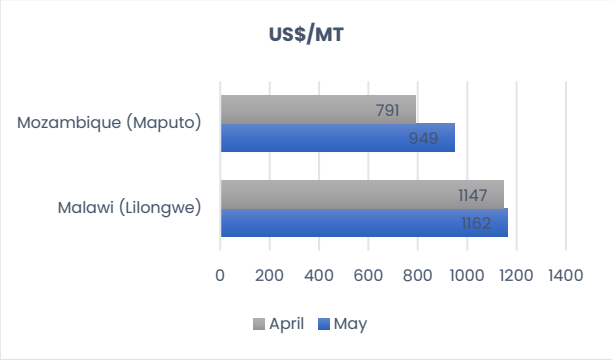
= low decrease (0-5%), = moderate decrease (5-15%), = high decrease (>15%)

[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

Rice

Figure 9: National average price spreads for rice across select Southern African Countries[29]



The price of rice is highest in Malawi, selling at US$1,162/Mt, compared to US$949/Mt in Mozambique (Figure 9). In table 11, however, the prices of rice across the select markets of Malawi and Mozambique remained stable over the past year, except the national average price in Mozambique, which experienced a 3.45% increase attributed to the weakening of the local currency, drought conditions in the region and an increase in demand for the staple crop. However, compared to the past 3-12 months, both Lilongwe and Mzuzu recorded significant price increases, with Lilongwe's ranging between 11% and 33%.

Table 11: Percentage Changes in rice prices in Southern Africa[30]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	Lilongwe, MWK/Kg	2,000.00	0.00	11.11	25.00	33.33
Malawi	Rice	Mzuzu, MWK/Kg	1,912.50	0.00	0.66	6.25	6.25
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

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

= 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 and Zambia remains mostly lower than a month ago, except NPK23 in Mozambique, which marked a slight increase of 0.53%. The price of NPK12 has maintained a considerable decline in price over the past 1-12 months in Mozambique by more than 7%. The price of urea is lower by 15.86% and 15.43% than 6 and 12 months ago respectively. In Zambia, the prices of urea and NPK fertilisers remain elevated above the levels seen in the past 3-12 months. Compared to 6 months ago, NPK is 21% higher, while urea is 18% higher.

Table 12: Percentage Changes in Fertiliser prices in Southern Africa[31]

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	991.33	-2.52	5.72	21.19	8.78
Zambia	Urea	National, ZMW/50KG	977.33	-3.14	6.77	18.51	4.42

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

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

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

[29] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[30] Author's construction based on FAO data

[31] Author's construction based on AfricaFertiliser.org

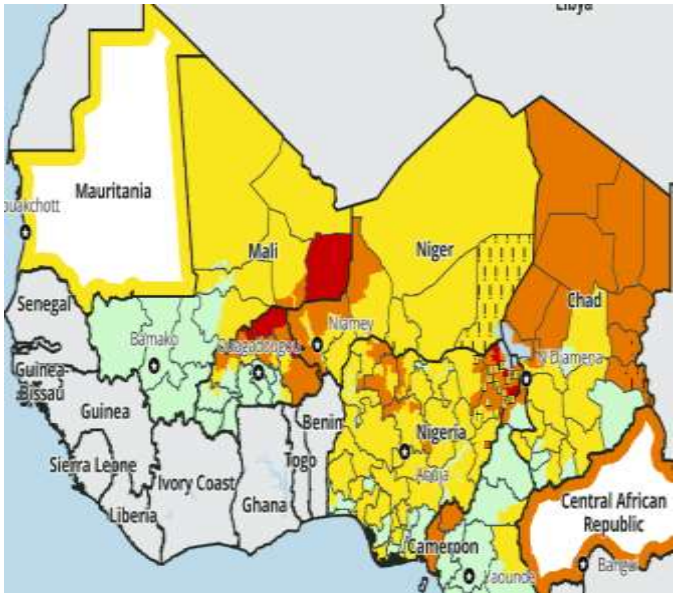
Seasonal Monitor and Cropping Conditions

Generally, the 2023/24 seasonal harvesting is coming to an end in the southern African region for areas not affected by the El Nino conditions, albeit woefully being below average. This year's cereal production is expected to be below average, and there are fears of insufficient stock to cover regional requirements Malawi, Zambia, and Mozambique are also expected to experience severely below average cereal production this year due to the ongoing drought conditions. **Mozambique** has experienced severe weather conditions. It is reported that approximately 690,000 hectares of crops, representing around 15 % of the total planted area, have been damaged by El Niño-induced drought but also because of heavy rains and flood occurrences. **Zambia** has experienced one of the hottest months in the year's first quarter, with February recording the hottest temperatures since 1981. The country now faces severe El Niño-induced drought in most areas, except across parts of the north, having received less than 50 % of typical rainfall amounts. In **Zimbabwe**, the country declared a state of disaster as it experiences failed harvests with well below-average yield outcomes attributed to the cessation of seasonal rains combined with dry and hot conditions. These conditions have impacted the soil moisture levels, and irrigation use may be impacted by the below-average reservoir water availability due to drought conditions during the summer season.

West Africa Food Security Update

Food Security Outlook

Figure 10: West African countries Food Security Outlook, February - May 2024



Humanitarian assistance and government intervention in the free distribution of cereals at subsidized prices have tempered conditions for Crisis (IPC Phase 3) outcomes in the northern parts of **Burkina Faso**. In **Niger**, Crisis (IPC Phase 3) food insecurity persists in the regions of Tillabéry, Tahoua, Maradi and Diffa due to continual insecurity, while Stress! (IPC Phase 2!) outcomes prevail in parts of Maradi and Diffa supported by humanitarian food distribution.[32] In **Nigeria**, despite the dry season April-May harvests, the early onset of the lean season is leading to sustained food consumption gaps for many poor households who will continue to face Crisis (IPC Phase 3) outcomes. However, Emergency (IPC Phase 4) outcomes are expected in Abadam, Guzamala, Bama, and Marte LGAs that remain inaccessible due to conflicts.[33] In **Mali**, Emergency (IPC Phase 4) outcomes persist and small proportion of the population in the northern region are predicted to be facing a Catastrophe situation (IPC Phase 5) conditions due to insecurity concerns as well as the impact of the ongoing lean season. However, Stressed (IPC Phase 2) and Crisis (IPC Phase 3) food insecurity outcomes are observed in border areas of Gao and Mopti due to Improved trade flows.[34]

Prevalence of insufficient food consumption

From table 13, the number of people with insufficient food for consumption as of 30th May 2024 across seven selected West African countries remain the same as in April at 158.3 million. This was due to a decline in Ghana counterbalanced by a rise in Togo. The prevalence of insufficient food consumption in May 2024, however, remains above last year's (127 million people) and two years ago (103.3 million people). In terms of changes in individual countries compared to the past 1 and 2 years, however, mixed trends are observed.

Table 13: Prevalence of insufficient food consumption in selected West African countries (May 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 ●	-0.88 ↘	6.67 ↗
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00 ●	70.00 ↑	8.51 ↗
Ghana	29.80	5.10	5.20	17.11	-1.92 ↘	-29.17 ↓	-13.56 ↓
Mali	19.10	13.20	13.20	69.11	0.00 ●	0.76 ↗	20.00 ↑
Niger	25.90	21.40	21.40	82.63	0.00 ●	18.89 ↑	37.18 ↑
Nigeria	202.80	100.40	100.40	49.51	0.00 ●	40.03 ↑	87.66 ↑
Togo	7.90	1.90	1.80	24.05	5.56 ↗	-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%)

Commodity prices

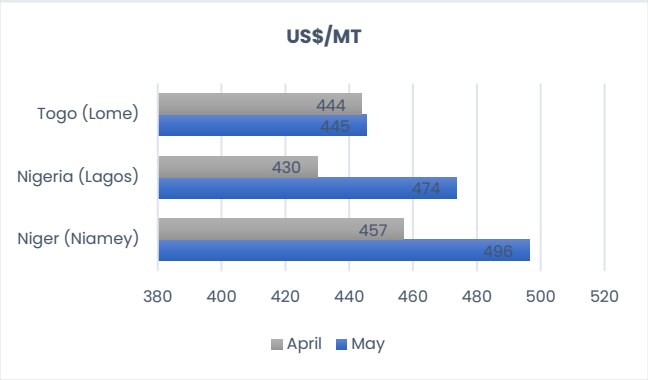
[32] https://fews.net/west-africa/niger
[33] https://fews.net/west-africa/nigeria
[34] https://fews.net/west-africa/mali

Key drivers of the price movements in West Africa include[35]

Insecurity & Armed Conflicts	Conflict, insecurity, and 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 11: Price spreads for Maize across select West African Countries[36]



The price of maize has increased in all three monitored countries (Figure 11). The prices of maize remain particularly elevated compared to the previous month in Niger at US$496 and Nigeria at US$474. This is further supported by price changes in individual markets as shown in Table 14. Some mixed trends are observed in Niger and Togo, but overall, maize prices remain elevated. 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.[37]

Table 14: Percentage Changes in maize prices in West Africa[38]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Niger	Maize	Agadez, Retail, XOF/Kg**	390.00	8.33	8.33	2.63	14.71
Niger	Maize	Dosso, Retail, XOF/Kg**	315.00	4.65	10.14	-8.70	31.25
Niger	Maize	Maradi, Retail, XOF/Kg**	300.00	-2.91	13.21	-17.13	25.00
Niger	Maize	Niamey, Retail, XOF/Kg**	301.00	-4.75	8.66	0.33	28.63
Niger	Maize	Tillaberi, Retail, XOF/Kg**	360.00	6.51	24.14	-6.98	21.62
Niger	Maize	Zinder, Retail, XOF/Kg**	292.00	-0.34	8.55	-15.12	15.87
Nigeria	Maize (white)	Giwa, NGN/KG**	569.00	6.92	211.78	191.79	3.45
Nigeria	Maize (white)	Ibadan, NGN/KG**	660.00	0.76	153.85	151.91	81.32
Nigeria	Maize (white)	Kano, NGN/KG**	564.45	-4.22	157.53	146.30	41.22
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	579.25	5.85	164.08	163.12	22.72
Nigeria	Maize (white)	Lagos, NGN/KG**	648.50	10.20	163.89	149.42	58.95
Nigeria	Maize (white)	Maiduguri, NGN/KG**	567.50	3.18	170.24	160.92	3.18
Togo	Maize (white)	Amegnran, XOF/Kg	255.00	2.00	0.00	13.33	-1.92
Togo	Maize (white)	Anie, XOF/Kg	245.00	-2.00	2.08	13.95	-2.00
Togo	Maize (white)	Cinkassé, XOF/Kg	250.00	0.00	0.00	11.11	-3.85
Togo	Maize (white)	Kara, XOF/Kg	260.00	0.00	4.00	-3.70	-4.41
Togo	Maize (white)	Korbongou, XOF/Kg	290.00	18.37	17.41	31.82	9.43
Togo	Maize (white)	Lomé, XOF/Kg	270.00	0.37	0.00	3.85	0.37

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

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

[35] Fewsnet 2024

[36] [36] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[37] https://fews.net/west-africa/nigeria

[38] Author's construction based on FAO data

Rice

Figure 12: Price spreads for rice across select West African Countries[39]

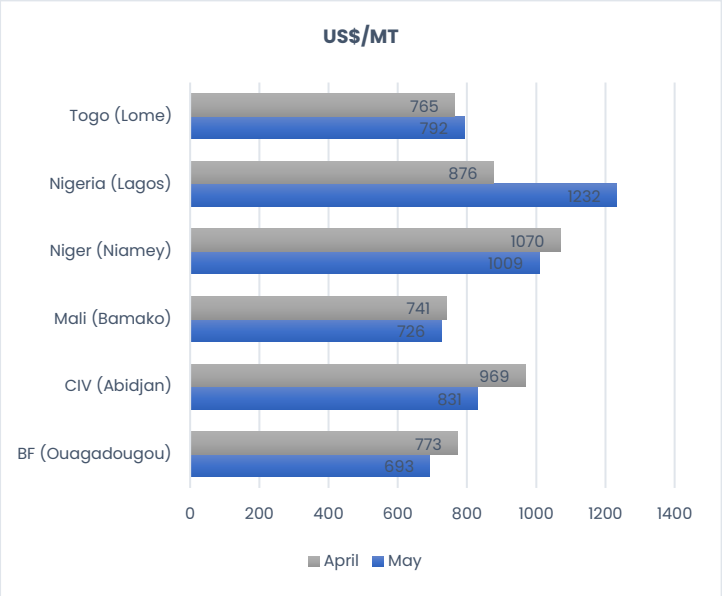


Figure 12 presents the price spread for rice across select West African countries, showing that rice is cheaper in Burkina Faso at US$693/Mt and most expensive in Nigeria at US$1,232/Mt. Regarding changes in prices (Table 15), mixed trends are observed. However, compared to the previous month, changes in rice prices generally show stability or declines, except in Nigeria where all three select monitored markets recorded significant price increases. In Nigeria, rice prices are well above the levels seen in the past 1-12 months, with Maiduguri registering 99.42% and 100.91% above the three-month level for both imported and locally milled rice, respectively. Also, Dori (Burkina Faso) and Abidjan (Cote d'Ivoire) have had a high increase in the price of rice compared to the past 1-12 months.

Table 15: Percentage Changes in rice prices in West Africa[40]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg*	57,000.00	3.64 ▲	9.62 ↑	23.91 ⊗	32.56 ⊗
Burkina Faso	Rice (imported)	Kongoussi, Wholesale, XOF/100 kg*	50,000.00	0.00 ●	0.00 ●	16.28 ⊗	16.28 ⊗
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg*	42,000.00	-9.68 ↓	-8.70 ↓	5.00	5.00
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg**	504.00	-14.43 ↓	-14.43 ↓	-15.44 ↓	-10.48 ↓
Cote d'Ivoire	Rice (imported	Abidjan, Retail, XOF/Kg**	581.00	15.51 ⊗	15.51 ⊗	15.74 ⊗	27.97 ⊗
Mali	Rice	Bamako, Wholesale, XOF/100 KG	44,000.00	-2.22 ↘	8.64 ↑	-2.22 ↘	-4.35 ↘
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	0.00 ●	4.00 ▲	4.00 ▲	4.00 ▲
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	47,000.00	2.17 ▲	4.44 ▲	-1.05 ↘	-6.00 ↓
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	45,000.00	2.27 ▲	4.65 ▲	4.65 ▲	4.65 ▲
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	45,000.00	1.12 ▲	0.00 ●	12.50 ↑	-5.26 ↓
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	48,000.00	4.35 ▲	9.09 ↑	20.00 ⊗	9.09 ↑
Niger	Rice (imported)	Maradi, Retail, XOF/Kg**	650.00	0.00 ●	8.33 ↑	14.64 ↑	44.44 ⊗
Niger	Rice (imported)	Niamey, Retail, XOF/Kg**	612.00	-5.85 ↓	-5.85 ↓	-8.25 ↓	22.40 ⊗
Niger	Rice (imported)	Tillaberi, Retail, XOF/Kg**	750.00	0.00 ●	-6.25 ↓	7.14 ↑	50.00 ⊗
Nigeria	Rice (imported)	Lagos, NGN/KG**	1,687.00	14.45 ↑	91.49 ⊗	102.16 ⊗	75.00 ⊗
Nigeria	Rice (imported)	Maiduguri, NGN/KG**	1,705.00	19.65 ⊗	99.42 ⊗	102.98 ⊗	77.60 ⊗
Nigeria	Rice (milled)	Maiduguri, NGN/KG**	2,200.00	9.73 ↑	100.91 ⊗	76.71 ⊗	37.50 ⊗
Togo	Rice (imported)	Cinkassé, XOF/Kg	475.00	1.06 ▲	3.26 ▲	2.15 ▲	1.06 ▲
Togo	Rice (imported)	Kara, XOF/Kg	470.00	0.00 ●	3.30 ▲	-5.05 ↓	-6.93 ↓
Togo	Rice (imported)	Lomé, XOF/Kg	480.00	0.00 ●	3.23 ▲	-2.04 ↘	-2.04 ↘

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

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

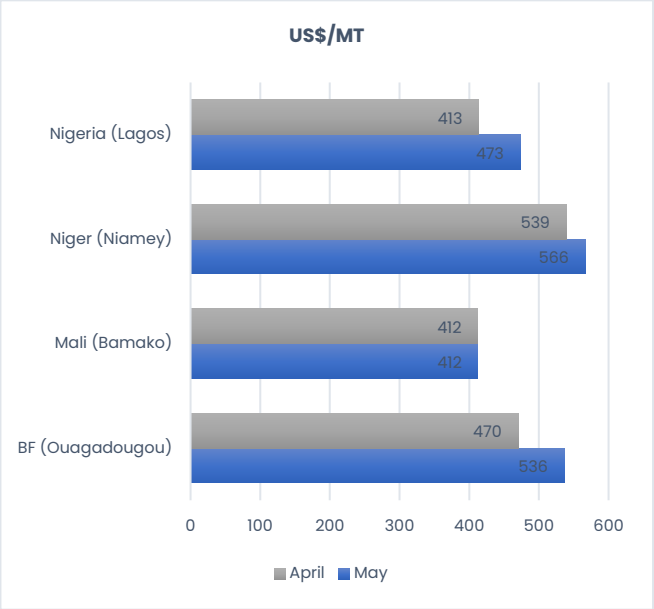
↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

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

[40] Author's construction based on FAO data

Millet

Figure 13: Price spreads for rice across select West African Countries[41]



In Figure 13, the price spread for millet across select West African countries shows that Niger is the most expensive (US$566/Mt) while Mali is the cheapest (US$412/Mt). These prices, however, remain mostly above the levels seen 1-12 months ago in most select markets across the region (Table 16). In select markets of Burkina Faso, Kongoussi and Ouagadougou registered elevated prices. Millet prices in Mali remained stable or declined except in Mopti and Segou. At the same time, Niger has recorded price increases in most of its selected markets, except Tillaberi, which recorded a price decrease of 4.7% over the past month.

In Nigeria, prices remain significantly elevated compared to the past 1-12 months, with prices being particularly significantly above their levels seen in the past 3-12 months by between 16% and 153%. As the countries enter the lean season, stock declines are expected from these countries, putting pressure on grain prices.

Table 16: Percentage Changes in millet prices in Ghana[42]

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	20.37	-10.96
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg*	35,000.00	0.00	7.69	2.94	9.38
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg*	32,500.00	22.64	22.64	20.37	-7.14
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg*	25,000.00	6.38	6.38	2.04	-3.85
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg*	32,500.00	14.04	25.00	18.18	16.07
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg*	32,500.00	0.00	12.07	8.33	12.07
Mali	Millet	Bamako, Wholesale, XOF/100 KG	25,000.00	0.00	4.17	8.70	-5.66
Mali	Millet	Gao, Wholesale, XOF/100 KG	32,500.00	0.00	8.33	4.84	0.00
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
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	30,000.00	-7.69	0.00	-14.29	-16.67
Niger	Millet	Agadez, Reail, XOF/Kg**	308.00	3.36	4.05	-8.33	-6.95
Niger	Millet	Maradi, Retail, XOF/Kg**	287.00	4.74	20.08	-1.37	12.55
Niger	Millet	Niamey, Retail, XOF/Kg**	343.35	5.00	16.39	13.32	9.00
Niger	Millet	Tillaberi, Retail, XOF/Kg**	352.00	-4.35	9.66	-10.66	7.65
Nigeria	Millet	Kano, NGN/KG**	599.53	5.27	140.60	118.53	87.53
Nigeria	Millet	Kaura Namoda, NGN/KG**	566.85	6.50	134.04	136.58	42.42
Nigeria	Millet	Lagos, NGN/KG**	647.50	14.40	126.40	111.77	16.88
Nigeria	Millet	Maiduguri, NGN/KG**	577.50	5.48	143.16	153.85	20.31

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

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

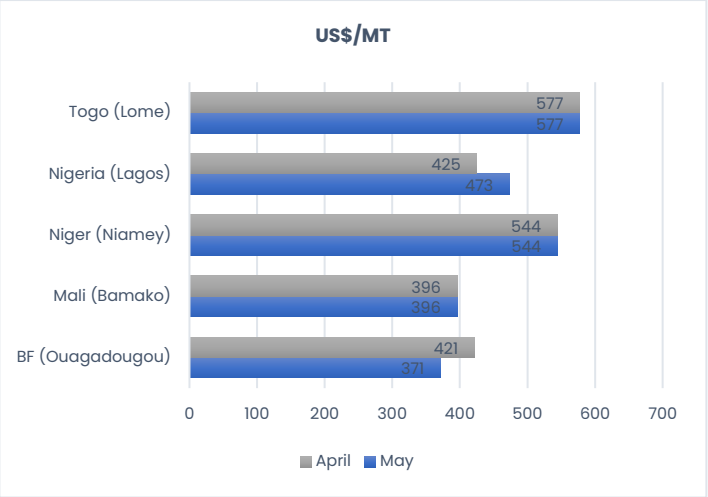
= low decrease (0-5%), = moderate decrease (5-15%), = high decrease (>15%)

[41] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[42] Author's construction based on FAO data

Sorghum

Figure 14: Price spreads for sorghum across select West African Countries[43]



The price of sorghum is higher in Togo (US$577/Mt) and lower in Mali (US$395/Mt) than in other select West African countries (Figure 14). However, Table 17 further reveals that the price of sorghum in Togo has declined or remained stable compared to the past 1, 6, and 12 months but higher than three months ago. In Nigeria, sorghum prices remain elevated in most of the select markets, ranging from 4.3% to 190.91% compared to the past 1-6 months, driven by seasonal patterns, conflicts, and poor macroeconomic conditions. Mixed trends are, however, observed in Burkina Faso, Mali, and Niger with, most markets showing stable prices over the past month.

Table 17: Percentage Changes in prices in Mali [44]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg*	22,500.00	-2.17	4.65	2.27	-2.17
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg*	32,500.00	1.56	18.18	12.07	20.37
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg*	22,500.00	12.50	9.76	4.65	7.14
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg*	22,500.00	-11.76	7.14	2.27	0.00
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	24,000.00	0.00	33.33	4.35	4.35
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00	8.70	13.64	8.70
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	25,000.00	8.70	8.70	8.70	-5.66
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	21,000.00	0.00	16.67	5.00	-6.67
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	32,500.00	0.00	8.33	-8.45	-9.72
Niger	Sorghum	Agadez, Retail, XOF/Kg**	310.00	-3.73	3.33	-8.01	-5.20
Niger	Sorghum	Maradi, Retail, XOF/Kg**	276.00	-1.08	22.12	-18.58	17.45
Niger	Sorghum	Niamey, Retail, XOF/Kg**	330.00	0.00	7.84	-6.52	10.00
Niger	Sorghum	Tillaberi, Retail, XOF/Kg**	357.00	9.85	21.02	-9.39	21.43
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	615.00	-6.11	119.64	119.64	5.31
Nigeria	Sorghum (white)	Kano, NGN/KG**	484.65	4.37	136.96	98.48	1.10
Nigeria	Sorghum (white)	Lagos, NGN/KG**	647.50	11.25	128.80	134.60	0.86
Nigeria	Sorghum (white)	Maiduguri, NGN/KG**	560.00	5.16	190.91	166.67	12.00
Togo	Sorghum	Anie, XOF/Kg	300.00	0.00	5.26	-3.23	-3.23
Togo	Sorghum	Cinkassé, XOF/Kg	290.00	1.75	5.45	-6.45	-3.33
Togo	Sorghum	Kara, XOF/Kg	310.00	0.00	3.33	-13.89	-12.68
Togo	Sorghum	Lomé, XOF/Kg	350.00	0.00	1.45	-24.73	0.00

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

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

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

[43] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[44] 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). For instance, Cote d'Ivoire's current price is 4-18% lower than they were 1-12 months ago. However, in Nigeria, the current price of all types of fertilisers is 7.9-24.25% higher than the previous month. Nonetheless, the current prices are significantly lower (36-53%) than the one-year level in Nigeria.

Table 18: Percentage Changes in Fertiliser Prices in West Africa[45]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG	34.18	-10.27 ↓	-10.27 ↓	-13.29 ↓	-18.95 ↓
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG	36.72	-4.72 ↘	-4.72 ↘	-8.97 ↓	-10.66 ↓
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG	33.41	-6.94 ↓	-6.94 ↓	-12.77 ↓	-17.89 ↓
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 April 2024, *May 2024, **March 2024, and ***February 2024

● = 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 **Nigeria**, dry season harvests from April-May are ongoing and expected to provide some respite on food prices. In the southern states' bimodal zones, the rainy season started normally during the February/March season and supported normal agricultural activities. However, in the central and northern zones, the beginning of the season has been characterized by erratic and below average rainfall.[46] In **Niger**, despite the early onset of the lean season in May instead of June, average off-season rice harvests are underway in the irrigated areas of Koulikoro, Mopti, Gao, Timbuktu and in the Office du Niger.[47] Throughout the region, vegetation conditions are favourable except in areas impacted by persisting conflict, including central **Mali**. According to the CHIRPS, the region has received above-average precipitation ranging from 75 mm to more than 200 mm in March and April.

[45] Author's construction based on AfricaFertiliser.org

[46] https://fews.net/west-africa/nigeria

[47] https://fews.net/west-africa/mali

Food Trade Updates

East Africa

Figure 15 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 15: East Africa Cross border trade updates May 2024

Kenya

The government of Kenya has imposed a 2% levy on imports of cereals such as maize, rice, and wheat. In addition, the government has imposed a 2% levy on the customs value of imports of legumes and pulses, including beans, lentils, soybeans, and peanuts, and a 1% levy on imported roots and tubers, including potatoes, cassava, sweet potatoes, and yams. This will take effect from 1st July 2024.

Southern Africa

Figure 16 below summarises some key activities and events recorded across Southern Africa impacting food trade activities.

- The Southern African Development Community (SADC) has launched a Regional Humanitarian Appeal of at least US$5.5 billion to support over 61 million people affected by the El Niño induced Drought and Floods.[48]

Figure 16: Southern Africa Food Trade updates for May 2024

Malawi

COMESA and Malawi signed a 900,000 Euros agreement to construct a cross border market to be funded under the 11 European Development Fund (EDF), Small Scale Cross Border Trade Initiative (SSCBTI). The market infrastructure is expected to boost formal small-scale cross-border trade flows between Malawi and Zambia and will include a market shelter, breastfeeding shelter, warehouse, shops, office block and public ablution block.

Zimbabwe

The government of Zimbabwe has launched the Digital Cross-border Permits and COMESA Carrier Licenses for Transport Operators to facilitate the smooth and unimpeded flow of cross-border traffic between countries.

Zambia

The government of Zambia suspended the tax on maize imports to address shortages caused by El Nino-induced drought, which affected about 45% of the total maize area planted, with 84 out of the 116 districts directly affected.

[48] https://www.sadc.int/latest-news/sadc-launches-us55-billion-regional-humanitarian-appeal-support-people-affected-el-nino

West Africa

Figure 17 provides an update on the issues and events reported in selected West African countries with implications for the region's food trade and food security in the region.

- ECOWAS has launched the West African Competitiveness Observatory to Boost Regional Exports.[49] The new online tool enables policymakers and businesses in West Africa to track their countries' trade competitiveness and find new business opportunities in the region.

Figure 17: West Africa Cross Border Trade Updates May 2024

Niger, Mali, and Burkina Faso

The Governments of Niger, Mali, and Burkina Faso have formed a new alliance called the Confederation of the Alliance of Sahel States (AES), despite the lifting of sanctions against them by ECOWAS Member States. The move is to chart a course towards a different regional alignment and international partnerships.

Ghana

Ghana receives approval to trade 700 products under AfCFTA. Under the AfCFTA Guided Trade Initiative, a total of 700 products have received rules-of-origin certification to trade under AfCFTA.

[49] https://www.ecowas.int/ecowas-itc-launch-west-african-competitiveness-observatory-to-boost-regional-exports/

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

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

FOOD SECURITY MONITOR

EDITION 47 • MAY 2024

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

For more information contact:

Inclusive Markets, Trade, and Finance Division Email:

Foodtrade@agra.org

AGRA

West End Towers, 4th Floor; Kanjata Road,
Muthangari Drive, Off Waiyaki Way
P.O Box 66773
Westlands 00800, Nairobi

AGRA Sustainably Growing Africa's Food Systems

BILL & MELINDA GATES foundation

The ROCKEFELLER FOUNDATION

UKaid from the British people

USAID FROM THE AMERICAN PEOPLE