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FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND
RESILIENCE INITIATIVE

EDITION **22**

February 2022



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

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Summary

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

Food Security Outlook. In February 2022, the food insecurity hotspots were South Sudan, Burkina Faso, Mali and Niger.

During the month, conflict-affected areas in the East Africa region continued to experience IPC Phase 3 (Crisis) outcomes.

The late start of the rainy season and subsequent erratic and below-average rainfall and tropical cyclones recorded across most parts of Southern Africa, have affected cropping activities, and will likely lead to below-average harvests across most parts of the region.

Most of West Africa continued to experience IPC Phase 1 (minimal) and IPC Phase 2 (stressed) outcomes, which are expected to remain in place until May 2022.

Food Trade.

COMESA, SADC and EAC signed a tripartite agreement aimed at harmonising guidelines to facilitate transportation and trade of goods and services in the region to ensure smooth movement of goods and people from one region to the other and strengthen regional integration.

In East Africa, Rwanda has reopened the Gatuna/Katuna border with Uganda after three years, saving truck owners millions in operating costs.

In Southern Africa, Zimbabwe opened its land borders in a move welcomed by cross-border traders who depend on cross-border trading for income and food remittances.

In West Africa, Togo recently launched Trade Barriers Africa; an online mechanism aimed at boosting trade by removing non-tariff barriers (NTBs) between African countries

Commodity Prices. Although global grain prices dipped at the beginning of the year, they surged from late January into February. This is expected to persist due to increasing macroeconomic pressures driven by the spill-over effects of the COVID-19 pandemic and the war between Russia and Ukraine, both significant players in the global grains market.

Weather shocks and insecurity/armed conflicts in parts of the East African region have affected crop outputs and led to price surges in most markets.

In Southern Africa, seasonality effects and conflicts in parts of the region have led to price surges while the availability of existing stocks continues to cushion prices in some parts of the region.

In West Africa, insecurity, armed conflicts, weather shocks, and macroeconomic shock have driven higher food prices in the region.

Climatic conditions. The forecasts for the March-April-May (MAM) rainfall season indicate a wetter than normal season in the central and southern parts of the East Africa region.

In Southern Africa current conditions and forecasts for the next three months indicate below-average rainfall for most parts of the region.

The rainfall forecasts for March-April-May indicate normal to above-normal rainfall for most parts of the West Africa 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 Outlook

Russia-Ukraine Conflict and the Implications for Food Security in Africa

Most African countries namely Egypt, Sudan, Nigeria, Tanzania, Algeria, Kenya and South Africa depend on food imports (wheat, maize and sunflower oil) from Russia and Ukraine. As of 2020, Russia exported USD 4 billion worth of agricultural products to Africa, with wheat accounting for 90% of total exports. Similarly, during the same year, Ukraine exported USD 2.9 billion worth of agricultural products to Africa, wheat accounting for 48% and maize 31%¹. Beyond Africa and at the global level, both countries produce 4% of the global maize supplies further demonstrating the important role the two countries play in the global food security market including that of Africa. Closing of ports in Ukraine and farmers neglecting their fields in a bid to stay alive will result in significant shortage of wheat supplies from Ukraine to the rest of the world. In addition, as sanctions against Russia by Western countries increase, grain exports from Russia are also likely to be suspended further worsening the global food supplies.

The military action by Russia in Ukraine has resulted in disruptions in global food supply chains and of crude oil which has resulted in an immediate surge in commodity prices. The world was already facing high commodity prices driven by the recent COVID-19 pandemic and the increase in global demand (mainly by India and China)² for grains and oilseeds on the back of poor production outlook in South America which has been affected by droughts. With parts of the region in Africa also projected to record below-average seasonal harvests following poor rains (in East Africa) and tropical cyclones in Southern Africa, we expect this to further put a pressure on food prices. Global maize prices have increased by 21%, wheat 35%, soybeans 20% and sunflower oil 11%³. Should the situation remain the same, African countries that depend on food imports from both Russia and Ukraine are expected to face serious food insecurity situations in the near term driven by lack of economic access to food particularly among low-income households. Food producers, namely farmers in these countries will likely benefit from these high food prices, but we also expect that their production costs to surge on the back of increasing oil prices also driven by the conflict. Increases in fuel prices due to supply chain disruptions in the Black Sea will significantly increase input costs pushing production costs and commodity prices up. This conflict has again further exposed the vulnerability of Food Systems in Africa are highly dependent on imports for food supplies.

Prevalence of Insufficient Food Consumption and Food Insecurity Hotspots

Figure 1 provides a status update on the prevalence of Insufficient Food Consumption across 17 selected East, Southern and West African countries in February. During the month, the number of Food Insecurity Hotspots, defined as countries where more than 50% of the total population has insufficient food for consumption,

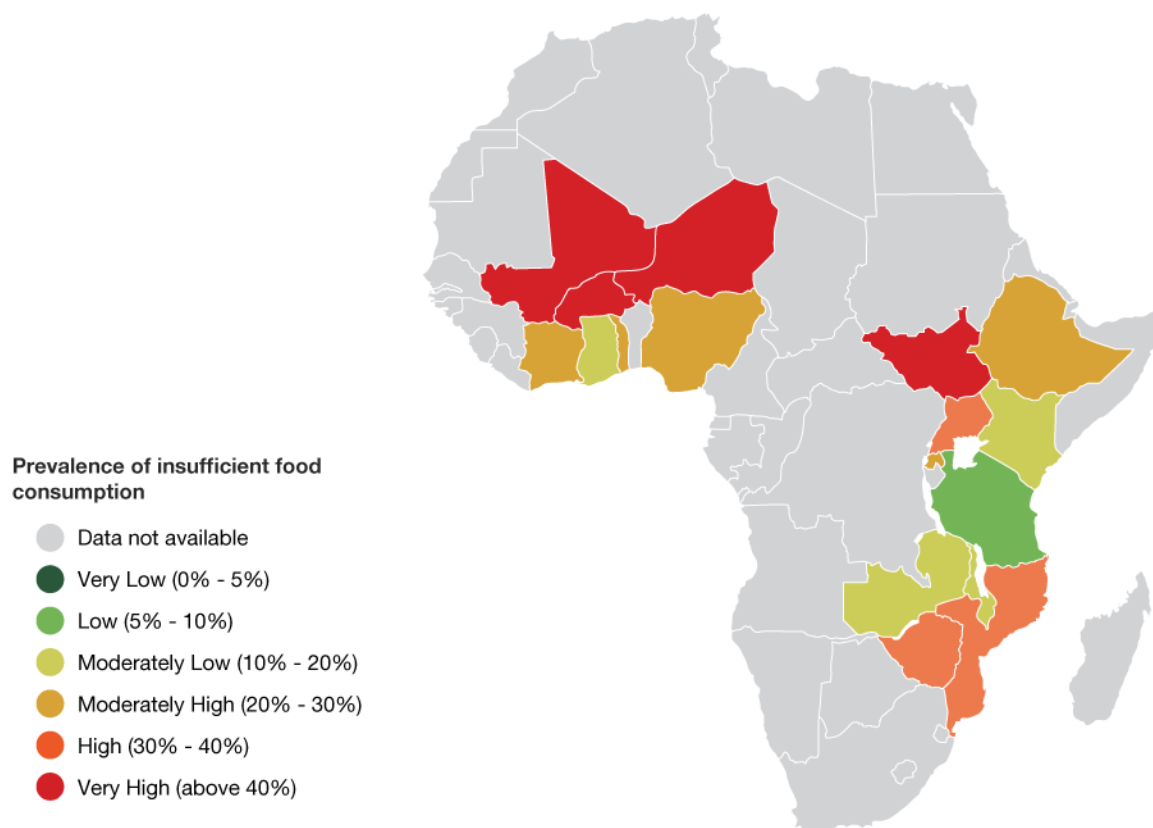
¹ <https://theconversation.com/how-russia-ukraine-conflict-could-influence-africas-food-supplies-177843> Accessed 8 March 2022

² <https://www.fao.org/worldfoodsituation/foodpricesindex/en/> Accessed 8 March 2022

³ <https://www.grainsa.co.za/report-documents?cat=2> Accessed 8 March 2022

remained at four. These hotspot countries were: South Sudan (60%), Burkina Faso (57.1%), Mali (61.8%) and Niger (66.1%).

Figure 1: Prevalence of Insufficient Food Consumption, February 2022



Source: Own analysis based on data from WFP (2022)⁴

East Africa

As of 27th February 2022, 57.5 million people across six selected East African countries did not have sufficient food for consumption. This was a 15.0 percent increase from January 2022, indicating that the food security situation deteriorated across these focus countries. Table 1 provides updates on how the prevalence of insufficient food consumption changed across the selected East African countries during February.

During the month, Rwanda, South Sudan and Uganda did not record any changes in the number of people with insufficient food for consumption. However, in South Sudan, although the number of people without sufficient food for consumption did not change, the prevalence of insufficient food for consumption remained very high at 60% of the population. Ethiopia recorded a significant increase (38.9%) in the number of people with insufficient food for consumption. However, the prevalence of food insecurity was moderately high at 20% of the country's total population. Kenya (14.7%) and Tanzania (9.3%) recorded moderate increases in the number of people with insufficient food for consumption during the month.

Table 1: Prevalence of insufficient food consumption across selected East African countries (Feb 2022)⁵

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 (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition of children under 5 (%)	
Ethiopia	109.20	15.70	21.80	19.96	38.85	⊗	7.20	36.80
Kenya	51.40	6.80	7.80	15.18	14.71	↑	4.20	26.20
Rwanda	12.30	2.50	2.50	20.33	0.00	●	2.30	38.30
South Sudan	11.00	6.60	6.60	60.00	0.00	●	22.70	31.30
Tanzania	56.30	4.30	4.70	8.35	9.30	↑	3.50	31.80
Uganda	42.70	14.10	14.10	33.02	0.00	●	3.50	28.90

⁴ <https://hungermap.wfp.org/>. Accessed 27 February 2022

⁵ <https://hungermap.wfp.org/> on Accessed 27 February 2022

*Previous month and ** Current month

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

Southern Africa

As of 27 February 2022, the number of people with insufficient food for consumption across the selected focus countries in Southern Africa stood at 21.3 million. This represents a 29.1 percent increase from January 2022, indicating that the region's food security situation deteriorated over the reporting period. Table 2 provides an update on how the prevalence of insufficient food consumption changed across the selected Southern African countries during February.

In Zimbabwe, the prevalence levels were high (36.1%) despite the country recording a low increase (1.96%) in the number of people with insufficient food for consumption. Mozambique recorded a significant increase with the prevalence being at a moderately high level of 34.9% of the country's population. Malawi recorded an increase of 26.1 % in the number of people with insufficient food for consumption, while the prevalence stood at 16.0% of the total population.

Table 2: Prevalence of insufficient food consumption in selected Southern African Countries (Feb 2022)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 (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition (of children under 5) (%)
Malawi	18.10	2.30	2.90	16.02	26.09	⊗	39.00
Mozambique	29.50	6.70	10.30	34.92	53.73	⊗	42.30
Zambia	17.40	2.40	2.90	16.67	20.83	⊗	34.60
Zimbabwe	14.40	5.10	5.20	36.11	1.96	▲	23.50

*Previous month and ** Current month

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

West Africa

The number of people with insufficient food for consumption across seven selected countries in West Africa was 106.5 million as of 27 February 2022. This was a 0.8 percent increase from January 2022, suggesting that the region's food security situation deteriorated over the reporting period. Table 3 provides an update of how the prevalence of insufficient food consumption changed across selected West African countries during February.

In Burkina Faso and Mali, the prevalence of insufficient food for consumption remained very high at 57.1% and 61.2% of the total population, respectively, despite the countries recording low decreases of 1.74% and 0.84%, respectively, in the number of people without insufficient food for consumption during the month. Cote d'Ivoire recorded a low increase of 1.85% of people with insufficient food for consumption, with the prevalence at moderately high levels of 21.9% of the total population. In Niger, the prevalence of insufficient food for consumption also remained very high (66.1%). The country saw a moderately high (12.9%) increase in the number of people with insufficient food for consumption.

⁶ <https://hungermap.wfp.org/> Accessed 27 February 2022

Table 3: Prevalence of insufficient food consumption in selected West African countries (February 2022)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 (%)	Acute malnutrition (of children under 5) (%)	Chronic malnutrition (of children under 5) (%)
Burkina Faso	19.80	11.50	11.30	57.07	-1.74	8.40	24.90
Cote d'Ivoire	25.10	5.40	5.50	21.91	1.85	6.10	21.60
Ghana	29.80	5.40	5.40	18.12	0.00	6.80	17.50
Mali	19.10	11.90	11.80	61.78	-0.84	9.00	26.90
Niger	22.40	13.10	14.80	66.07	12.98	14.10	48.50
Nigeria	202.80	56.30	55.60	27.42	-1.24	6.80	36.80
Togo	7.90	2.10	2.10	26.58	0.00	5.70	23.80

*Previous month and ** Current month

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

East Africa Food Security Outlook

Conflict-affected areas in the region continued to experience IPC Phase 3 (Crisis) outcomes during February.

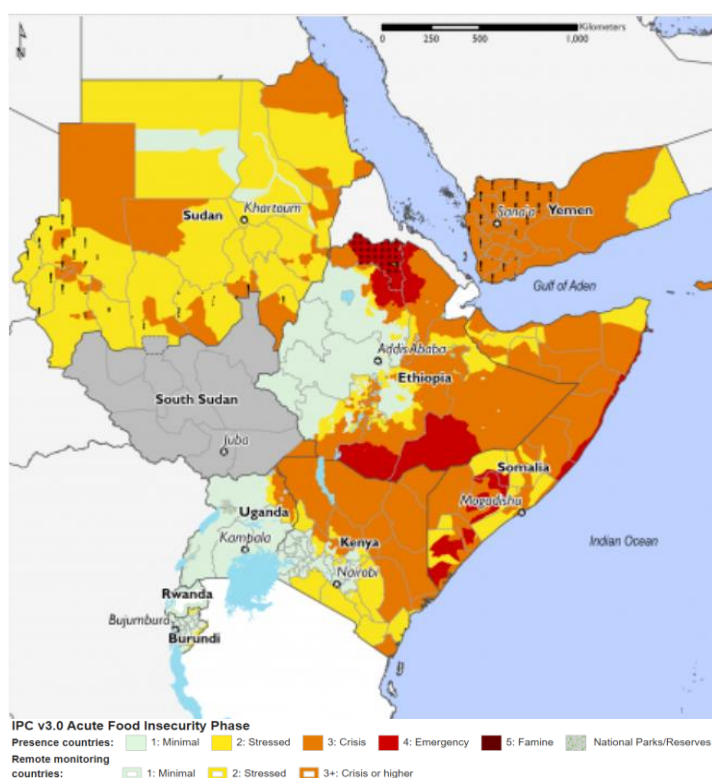


Figure 3: East Africa countries Food Security Outlook, Feb-May 2022

Ethiopia: IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) across Tigray, bordering areas of Amhara and Afar, and some southern zones of Oromia and Somali regions are expected to persist as the country continues to struggle with conflicts in affected parts of the country. This further worsens the food security situation, which was already affected by the poor rainfall during the October to December 2021 Meyr season in the southern and southeastern pastoral areas⁸.

Kenya: The poor performance of the October-December 2021 short rains in the Arid and Semi-Arid Lands continue to drive worsening food security situations, with an estimated 2.8 million reported to be experiencing IPC Phase 3 food security outcomes⁹.

South Sudan: Climate change, mainly prolonged floods, continues to impact the agricultural sector and drive displacements, which were already being experienced due to the endemic violence and conflict in the country. The FAO estimates that 65,107 hectares of land planted with cereals had been damaged, with an estimated loss of 37,624 tonnes of grain in the flood-affected areas¹⁰.

Rwanda: Most parts of the country experienced below-average rainfall between October and December 2021, affecting the planting period of 2022. As a result, affected parts of the country, mainly the Eastern region, are projected to record below-average harvests, which will lead to an increase in food prices and limit the access to food in the affected areas¹¹.

⁷ <https://hungermap.wfp.org/> Accessed 27 February 2022

⁸ <https://fews.net/east-africa/ethiopia> Accessed 28 February 2022

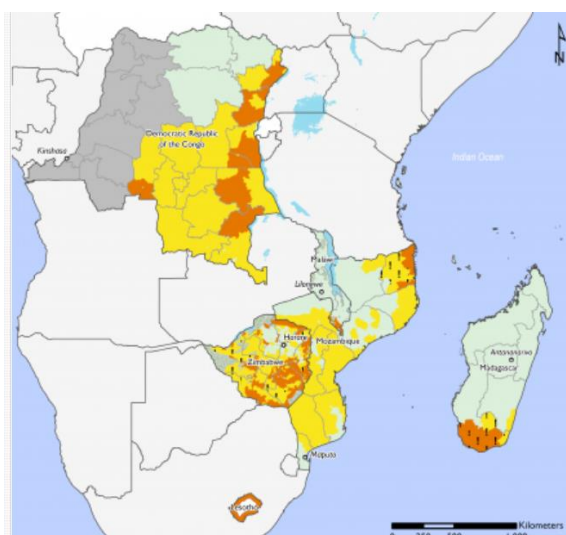
⁹ <https://reliefweb.int/report/kenya/kenya-arid-and-semi-arid-lands-drought-response-dashboard-january-december-2021> Accessed 28 February 2022

¹⁰ <https://reliefweb.int/report/south-sudan/south-sudan-humanitarian-needs-overview-2022-february-2022> Accessed 28 February 2022

¹¹ <https://reliefweb.int/report/rwanda/rwanda-update-food-security-drivers-october-december-2021-issue-no-59> Accessed 28 February 2022

Uganda: The country witnessed varied food security outcomes across different regions. In Karamoja, IPC Phase 2 and IPC Phase 3 outcomes were experienced due to the ongoing lean season sustained by below-average crop production in the previous year and reduced household incomes due to declining trade. The bimodal regions are projected to have above-average crop and livestock production, which will see an increase in access to food and incomes driving IPC Phase 1 outcomes¹².

Southern Africa Food Security Outlook



IPC v3.0 Acute Food Insecurity Phase
 Presence countries: 1: Minimal 2: Stressed 3: Crisis 4: Emergency 5: Famine 6: National Parks/Reserves
 Remote monitoring countries: 1: Minimal 2: Stressed 3+: Crisis or higher

Figure 4: Southern Africa countries Food Security Outlook, October 2021- January 2022

The late start of the rainy season and subsequent erratic and below-average rainfall and tropical cyclones recorded across most parts of the region affected cropping activities, likely leading to below-average harvests across most parts of the region.

Malawi: The food security situation is generally stable, with a high proportion of the households reported to have acceptable food consumption according to the World Food Programme. The physical access to markets has generally been high as farmers continued procuring inputs for the production season after the country began receiving significant rains in January¹³.

Mozambique: Households in the northern parts of the country have been experiencing IPC Phase 1 outcomes sustained by their own food production and market purchases. The Southern parts of the country continue to experience IPC Phase 3 outcomes due to poor harvests from the previous season. The impact of Tropical Storm Ana continues to affect households in Dumako, where IPC Phase 2 and Phase 3 outcomes are being experienced¹⁴.

Zimbabwe: The poor and erratic rainfall recorded during the current season is expected to result in below-average

harvests this season. As a result, the country will witness short-term food security improvements around April. However, livelihood strategies including crop sales, casual labour, livestock sales, informal cross border trade, and vegetable production and sale, among others, are expected to remain at normal levels, which will help reduce severe food insecurity outcomes¹⁵.

West Africa Outlook

Burkina Faso: Conflicts, declining food stocks, increasing commodity prices and declining incomes have been impacting food access for most poor households across the country, leading to IPC Phase 4 outcomes¹⁶.

Mali: Cereal production for the 2021/22 season is estimated to be similar to the five-year average, and this will contribute to the satisfactory availability of food. However, some localised declines in crop production due to drought and insecurity have affected food availability in conflict-affected areas of the Centre and North parts of the country¹⁷.

¹² <https://fews.net/east-africa/uganda> Accessed 28 February 2022

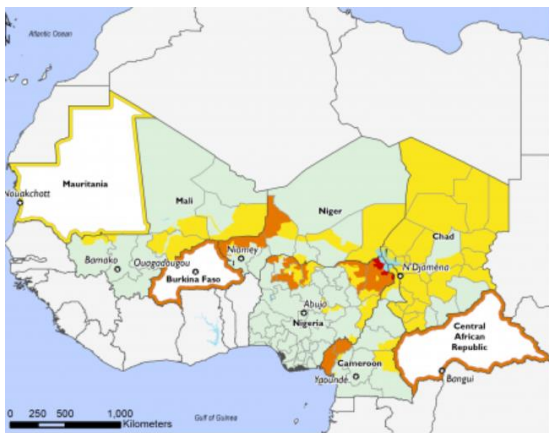
¹³ <https://reliefweb.int/report/malawi/malawi-household-food-security-bulletin-mobile-vulnerability-analysis-and-mapping-17> Accessed 28 February 2022

¹⁴ <https://fews.net/southern-africa/mozambique> Accessed 28 February 2022

¹⁵ <https://reliefweb.int/report/zimbabwe/zimbabwe-food-security-outlook-february-september-2022> Accessed 28 February 2022

¹⁶ <https://fews.net/west-africa/burkina-faso> Accessed 28 February 2022

¹⁷ <https://fews.net/west-africa/mali> Accessed 28 February 2022



Niger: Low carryover stocks and a decline in rainfed agricultural production, coupled with a limited availability in the markets have been driving high food insecurity outcomes. Commodity prices remain significantly high above the five-year average, thus limiting the access for low-income households. Security tensions in the regions of Diffa and Tillabéry, North Tahoua and South-West Maradi continue to disrupt off-season agricultural activities, movement of animals and agricultural labour and hamper the functioning of markets in the affected areas¹⁸.

Figure 5: West Africa countries Food Security Outlook, Feb-May 2022

Food Trade Updates

East Africa

The East Africa Community (EAC) has reported that it will be putting the Trade Remedies Committee (TRC) in place by the end of April 2022. The objective of the body is to assist businesses across the region that are suffering unfair trade deals from foreign rivals. The body will investigate unfair trading complaints and make recommendations to governments on the corrective measures to adopt to¹⁹. The Democratic Republic of Congo's admission into the EAC bloc has been approved by the EAC council, which has since directed the EAC secretariat to develop a draft roadmap for the integration of the DRC into the community, and submit it to the Council for consideration²⁰

Figure 6 below provides an update of the various events and activities recorded across different countries in East Africa over the past month, impacting food trade in the region between December 2021 and January 2022.

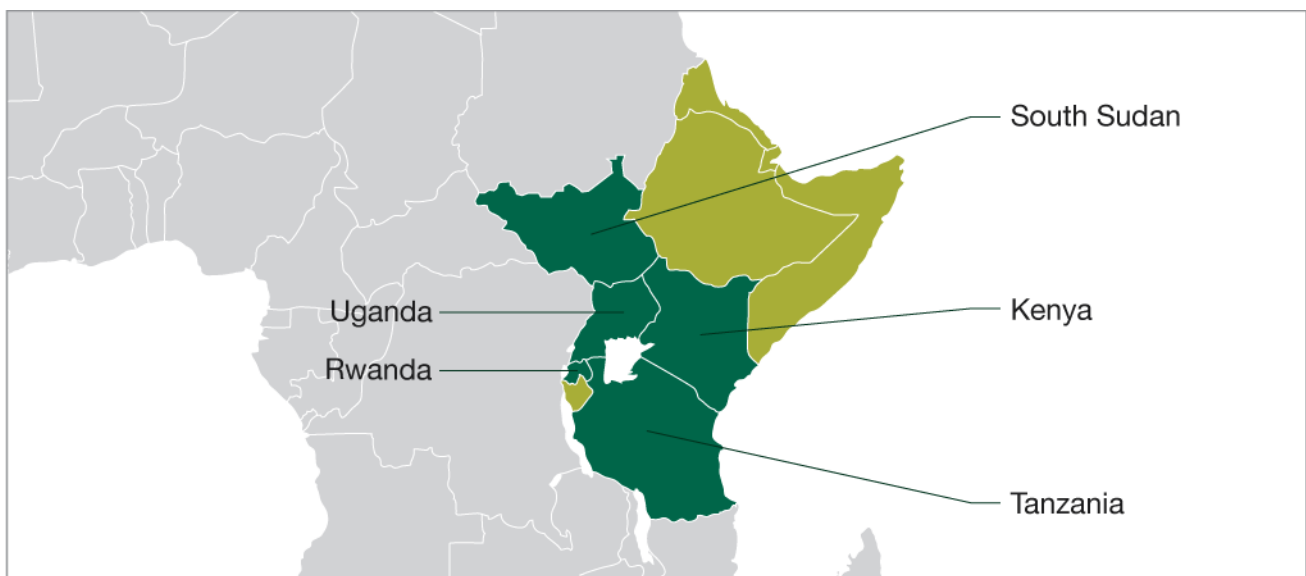


Figure 6: East Africa Cross border trade updates Feb 2022²¹

¹⁸ <https://fews.net/west-africa/niger>

¹⁹ <https://www.businessdailyafrica.com/bd/markets/market-news/new-eac-trade-watchdog-now-expected-april-3712328> Accessed 28 February 2022

²⁰ <https://www.theeastafrican.co.ke/tea/news/east-africa/eac-council-approves-drc-admission-3712222> Accessed 28 February 2022

²¹ <https://www.businessdailyafrica.com/bd/corporate/shipping-logistics/truckers-to-save-millions-as-rwanda-opens-border-3701714> Accessed 28 February 2022

RWANDA

- Rwanda has reopened the Gatuna/Katuna border with Uganda which had been closed for nearly three years following a dispute between Kigali and Kampala. The reopening of the border is expected to save truck owners millions in operating costs.
- The border, however, still remains closed to passengers as both countries are still working on COVID-19 modalities.
- Recent statistics released by the National Agricultural Export Development Board (NAEB) show that Rwanda earned over \$543 million (about Rwf543 billion) in agricultural export revenues from January to December 2021 against over \$390 million in the same period in 2020, representing an increase of 39 percent.
- The government has sustained its halts on the importation of poultry products, especially chicks, as it looks to prevent the spread of bird flu in the country.

TANZANIA

- Tanzania has opened grain storage facilities in Lubumbashi, DR Congo, and Juba in South Sudan to facilitate the sale of surplus food crops, and has already delivered 800 tonnes of grains to the two centres. This is all in efforts to enable Tanzanian farmers and traders get good markets for their products.

SOUTH SUDAN

- The East African Business Council has urged the Republic of South Sudan to fully implement the EAC Single Customs Territory to spur intra-EAC trade.

KENYA

- Kenya and Uganda have announced that they will be building a marshalling yard at Malaba border to decongest one of the region's busiest transboundary crossings.
- Kenya plans to enhance its food safety in order to boost agricultural exports in line with the Food and Agriculture Organization of the United Nations, the World Health Organization and the World Trade Organization agreements.
- Manufacturers are pushing for the removal of import duty on raw materials and a reduction in the number of levies in a bid to lower production costs and increase the competitiveness of locally-made goods.
- The Chinese government has allowed Kenya to export fresh avocado after four years of lobbying as Beijing reverses an initial requirement that only allowed frozen produce, coming as a major boost to farmers.

UGANDA

- Milk and milk products from Uganda still face challenges crossing the border into Tanzania and Kenya, with Ugandan traders complaining that Tanzania was charging them fees that were a lot higher than it was charging other trucks using the same border and road.
- There are allegations that Tanzania is charging Ugandan truckers up to \$500 toll fees per truck yet it charged only \$152 for Rwandan and other trucks.
- To this end Uganda has threatened to retaliate. However, the two countries have agreed to resolve the issue with both countries appointing parties within all ministries, departments and agencies across the two countries to coordinate, follow up and ensure quick and full implementation of the resolution.

<https://www.theeastafrican.co.ke/tea/news/east-africa/crossing-at-reopened-border-as-rwanda-uganda-3700576> Accessed 28 February 2022

<https://www.theeastafrican.co.ke/tea/business/tanzania-sell-grain-in-drc-and-south-sudan-3701564>

<https://www.newtimes.co.rw/business/rwandas-agriculture-exports-rose-39-rwf543bn-2021> Accessed 28 February 2022

<https://www.newtimes.co.rw/news/rwanda-course-wean-herself-poultry-imports> Accessed 28 February 2022

<https://eabc-online.com/eabc-urges-south-sudan-to-fully-implement-the-eac-single-customs-territory/> Accessed 28 February 2022

<https://www.theeastafrican.co.ke/tea/business/uganda-kenya-set-up-depot-to-unclog-malaba-border-3716654> Accessed 28 February 2022

<https://www.theeastafrican.co.ke/tea/business/northern-corridor-seeks-new-routes-to-ease-congestion-3717782> Accessed 28 February 2022

<https://africa.cgtn.com/2022/02/17/kenya-to-enhance-food-safety-to-boost-agricultural-exports/> Accessed 28 February 2022

<https://www.businessdailyafrica.com/bd/economy/industries-want-import-duty-on-raw-materials-scrapped-3725634> Accessed 28 February 2022

²¹ <https://www.businessdailyafrica.com/bd/markets/commodities/china-allows-exports-of-fresh-kenyan-avocados-3728576> Accessed 28 February 2022

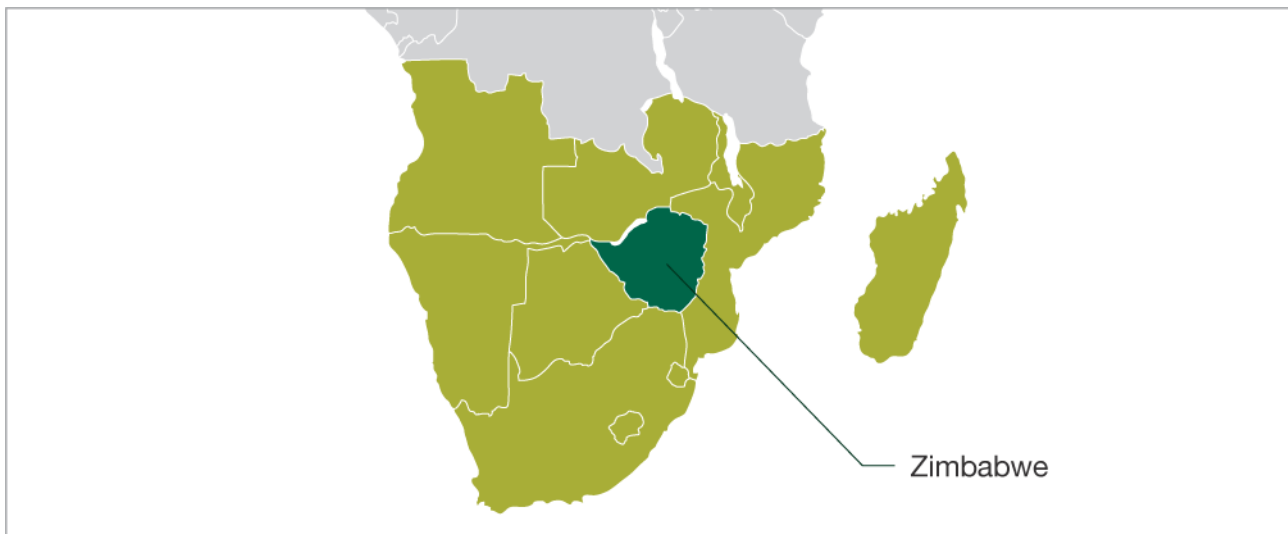
<https://theexchange.africa/countries/tanzania/uganda-tanzania-border-tariff-dispute/> Accessed 28 February 2022

Southern Africa

The Southern Africa Development Community (SADC) will be convening policy dialogues to facilitate regional integration by easing trade transportation and movement of goods and services across the Region. These policy dialogues are part of the various activities being implemented under the SADC Dialogue Facility (SDF), a programme funded by the European Union where approximately EUR 3 million has been availed to the regional body to support the regional integration agenda²². In another move aimed at promoting regional integration, COMESA, SADC and EAC have signed a tripartite agreement aimed at harmonising the guidelines to facilitate the transportation and trade of goods and services in the region, to ensure a smooth movement of goods and people from one region to another²³. COMESA has recommended that the Simplified Trade Regime²⁴ threshold remains at USD 2,000.²⁵

Figure 7 summarises some of the key activities and events recorded across Southern Africa that impact food trade activities.

Figure 7: Southern Africa Food Trade updates for February 2022²⁶



ZIMBABWE

- Zimbabwe sent a delegation to Namibia to enhance business linkages and trade opportunities between the two countries, and to explore ways through which Zimbabwe can use its dry port in Namibia as an alternative route.
- The Zimbabwean sugar industry has been reported as being uncompetitive for export market due to monopoly, policy and value chain inefficiencies. Sugar is currently priced at USD 738 per tonne which is above the SADC price average of USD 500.
- Zimbabwe opened its land borders in a move that was welcomed by traders, who depend on cross-border trading for income and food remittances.
- However, in other parts of the country namely in Victoria Falls, informal cross border traders are appealing to government to introduce temporary border passes to allow them to enjoy easy passage into Zambia to trade.
- Zimbabwe and Botswana are intensifying efforts to establish a one-stop-border post (OSBP) at the Plumtree/Ramokgwebana port of entry. To this end the two countries have signed an MOU that will lead to agreements towards setting up of the OSBP.

²² <https://www.sadc.int/news-events/news/sadc-embarks-policy-dialogues-ease-trade-and-movement-goods-and-services-across-region/> Accessed 28 February 2022

²³ <https://www.sadc.int/news-events/news/comesa-sadc-and-eac-collaborate-ease-movement-people-and-goods-regions-boost-intra-regional-trade> Accessed 28 February 2022

²⁴ A Simplified Trade Regime (STR) is an arrangement implemented by COMESA Member States to formalise and improve the performance of the small-scale cross border traders enabling them to benefit from the regional preferential treatment when importing or exporting goods within the region

²⁵ <https://www.tralac.org/news/article/15506-tralac-daily-news-15-february-2022.html> Accessed 28 February 2022

²⁶ <https://neweralive.na/posts/zimbabwe-targets-increased-trade-with-namibia> Accessed 28 February 2022

<https://www.263chat.com/zim-sugar-industry-uncompetitive-report/> Accessed 28 February 2022

<https://www.herald.co.zw/stakeholders-welcome-reopening-of-borders/> Accessed 28 February 2022

<https://www.chronicle.co.zw/victoria-falls-informal-traders-want-temporary-border-passes/> Accessed 28 February 2022

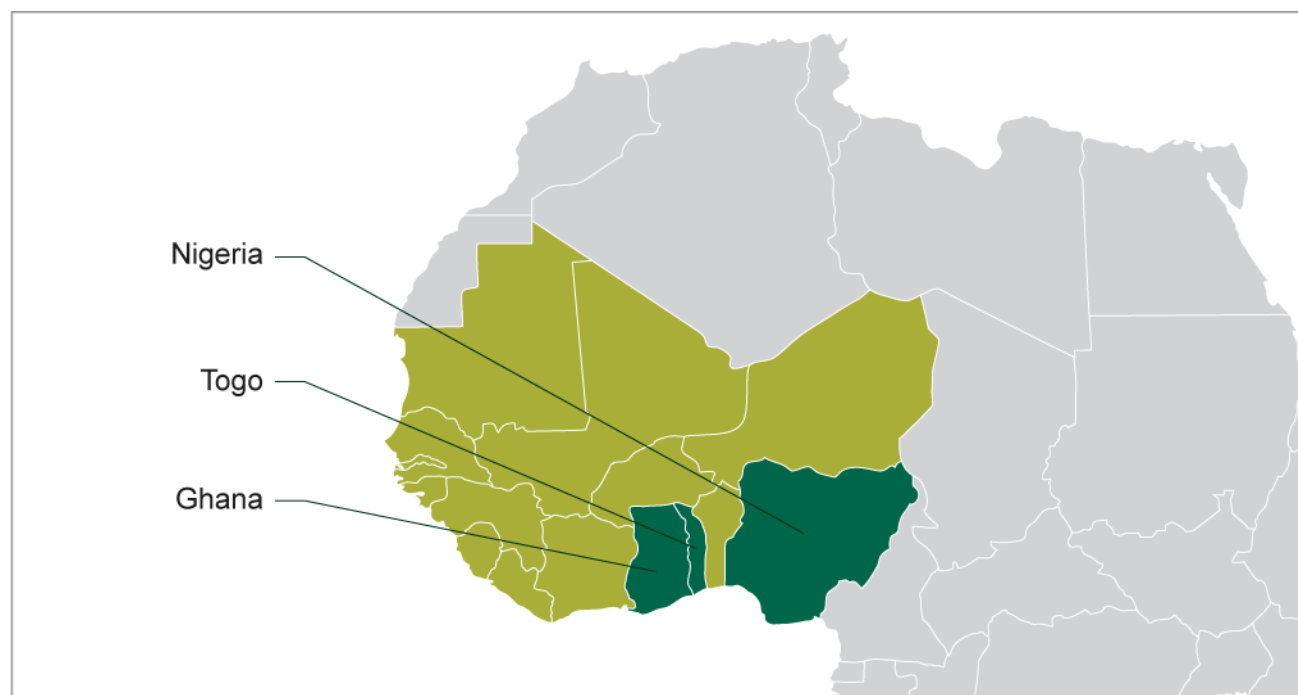
<https://www.cainewsafrika.com/2022/02/22/botswana-zimbabwe-finalise-plans-for-one-stop-border/> Accessed 28 February 2022

West Africa

The African Development Bank has approved a \$750,000 grant for the West African Monetary Union (WAMU) to help drive reforms and deepen the regional financial market to make it more competitive and attractive to investors²⁷. The Head of the Agriculture Division at the ECOWAS Commission in Abuja had called for the harmonisation of Organic Agriculture standards in West Africa arguing that it will help grow trade in the region. He argued that a harmonised Organic Standards for Participatory Guaranteed System (PGS) would help advance the quality of regional trade as the standards will enhance the visibility of organic agriculture²⁸.

Figure 8 provides an update of issues and events reported in selected West African countries that impacted food trade and food security in the region.

Figure 8: West Africa Cross Border Trade Updates Feb 2022



NIGERIA

- The Federal Government has warned against too much regulatory requirements, citing that it hurts the country's export potential through slowed certification processes.

TOGO

- Togo recently launched Trade Barriers Africa; an online mechanism aimed at boosting trade by removing non-tariff barriers (NTBs) between African countries.
- The facility is a component of the African Continental Free Trade Area (AfCFTA). The platform allows traders and companies that move goods across Togo's borders to report NTBs that impede their activity in the country.

GHANA

- The Government of Ghana has signed a Memorandum of Understanding (MoU) with Rwanda to deepen bilateral trade relations between the two countries on the back of the Africa Continental Free Trade Area (AfCFTA) agreement.
- The private sector has sought an end to the imposition of restrictive trade rules and counter-actions between Ghana and Nigeria fearing this could affect economic development between the two countries. To this end, the Ghana High Commission to Nigeria, announced its readiness to boost business opportunities with Nigeria.
- The Ghana Union of Traders Association (GUTA) has said it is poised to support local manufacturing companies by exporting their goods to other countries.

²⁷ <https://www.afdb.org/en/news-and-events/press-releases/west-african-monetary-union-african-development-bank-approves-750000-grant-development-regional-financial-market-49074> Accessed 28 February 2022

²⁸ <https://tribuneonlineng.com/harmonisation-of-standards-will-grow-organic-agriculture-in-west-africa-ecowas/> Accessed 28 February 2022



Agricultural Commodities Price Monitoring

Overview of Global Prices

Global grain prices have surged higher since 2011 due to strong demand and adverse weather effects.²⁹ Compared to their levels a year ago, grain prices have surged up, for instance, maize (21%), wheat (35%), soybeans (20%), and sunflower oil (11%).³⁰ Although prices dipped at the beginning of the year, they have picked up from late January into February 2022, except for rice (see figure 9 below). This rising trend is expected to persist on the back of increasing macroeconomic pressures driven by the spill-over effects of the COVID-19 pandemic and, more importantly, the war between Russia and Ukraine as both play significant roles in the grains market. Wheat prices, for instance, are predicted to be up by 50% due to restricted trade from these countries.³¹



Figure 9: Global Commodity Prices, February 2022³²

East Africa

Key drivers of commodity prices in EA³³



Weather Shocks

Three consecutive failed rains or droughts and flooding in parts of the East African region have hampered agriculture production activities leading to low agriculture output and high commodity prices.³⁴



Conflicts in Ethiopia and South Sudan

Conflicts in parts of the East African region, particularly in Ethiopia and South Sudan, continue to affect food prices, as the situation constrained farming and trading activities.³⁵

Maize prices declined in Ethiopia compared to the last 1-3 months but remained above price levels 6-12 months ago. Although price data was unavailable for January 2022, Kenya's Business Daily reported a surge in maize

²⁹ AMIS Market Monitor Report No. 95 February 2022

³⁰ https://theconversation.com/how-russia-ukraine-conflict-could-influence-africas-food-supplies-177843?utm_medium=email&utm_campaign=Latest%20from%20The%20Conversation%20for%20February%2024%202022%20-%202214421975&utm_content=Latest%20from%20The%20Conversation%20for%20February%2024%202022%20-%202214421975+CID_75ae5c5d39ef3e1a29eb59a7b589c0d4&utm_source=campaign_monitor_africa&utm_term=How%20Russia-Ukraine%20conflict%20could%20influence%20Africas%20food%20supplies

³¹ RATIN. https://ratin.net/site/news_article/11259. Accessed on 2nd March 2022

³² <http://www.amis-outlook.org/index.php?id=48513>. Accessed on 2nd March 2022

³³ FEWSNET, 2022. <https://fews.net/east-africa>. Accessed 27 January 2022

³⁴ https://ratin.net/site/news_article/11174

³⁵ FEWSNET. <https://fews.net/east-africa>. Accessed on 2nd March 2022

prices.³⁶ From Table 4 below, it is evident that maize prices are higher than they were in the past 3-12 months. Kenya has been among the East African countries experiencing poor rains for the last three consecutive seasons. On the other hand, except in Kigeme, Rwanda has experienced lower prices than 1-3 months ago, although this remains above the levels 6-12 months ago. The favorably low prices result from the high availability of food from the season A harvests and recovery of food imports and economic activities.³⁷ Selected markets in South Sudan, except Aweil and Rumbek, experienced price surges over the previous month. In most markets, South Sudan experienced higher maize prices than 3 months ago but generally lower than levels for the past 6-12 months. It is not clear what is driving the generally low maize prices in South Sudan, although the country is experiencing a worse food insecurity situation in the region.³⁸ One possible factor could be supplies brought in through humanitarian assistance. Generally, Tanzania has experienced higher maize prices than in the past 1-12 months, which is typical of the lean season. On the other hand, Uganda had lower maize prices than the past 1-3 months, which may be attributed to minor second season harvests in December. However, maize prices are still well above their levels 6-12 months ago.

Table 4: Changes in maize prices in selected East African Countries³⁹

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Ethiopia	Maize (white)	Addis Ababa, Ethiopian Birr/KG	21	-8.79 ↓	-11.32 ↓	7.12 ↑	94.47 ×
Ethiopia	Maize (white)	Diredawa, Ethiopian Birr/KG	24	-1.87 ↘	-2.72 ↘	12.38 ↑	82.95 ×
Kenya	Maize (white)	Eldoret, Wholesale, KES/KG*	36		44.23 ×	24.10 ×	43.94 ×
Kenya	Maize (white)	Nairobi, Wholesale, KES/KG*	40		21.43 ×	19.25 ×	11.39 ↑
Kenya	Maize (white)	Nakuru, Wholesale, KES/KG*	34			15.49 ×	26.02 ×
Rwanda	Maize (white)	Kabuga, Retail, RWFGK*	283	-15.00 ↓	-18.47 ↓	32.17 ×	2.41 ▲
Rwanda	Maize (white)	Kigeme (Camp), Retail, RWFGK*	450	10.71 ↑	24.42 ×	74.19 ×	17.39 ×
Rwanda	Maize (white)	Mugera, Retail, RWFGK*	273	-13.17 ↓	-17.40 ↓	22.04 ×	3.37 ▲
Rwanda	Maize (white)	Nyabiheke (Camp), Retail, RWFGK*	223	-33.99 ↓	-29.47 ↓	10.87 ↑	19.64 ×
South Sudan	Maize (white)	Aweil, Retail, South Sudanese Pound/KG	186	32.38 ×	-34.93 ↓	-10.84 ↓	-12.40 ↓
South Sudan	Maize (white)	Juba, Retail, South Sudanese Pound/KG	387	6.54 ↑	8.77 ↑	18.49 ×	-7.96 ↓
South Sudan	Maize (white)	Rumbek, Retail, South Sudanese Pound/KG**	267	-16.70 ↓	-42.87 ↓	-60.30 ↓	-34.89 ↓
South Sudan	Maize (white)	Torit, Retail, South Sudanese Pound/KG	172	20.00 ×	20.00 ×	-14.29 ↓	-14.29 ↓
South Sudan	Maize (white)	Wau, Retail, South Sudanese Pound/KG	257	3.81 ▲	5.88 ↑	-12.20 ↓	-10.00 ↓
Tanzania	Maize (white)	Arusha (urban), Wholesale, TZS/100KG	63,917	6.23 ↑	28.91 ×	33.67 ×	18.92 ×
Tanzania	Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	60,792	11.20 ↑	36.10 ×	26.05 ×	4.68 ▲
Tanzania	Maize (white)	Kigoma, Wholesale, TZS/100KG	62,000	0.27 ▲	40.44 ×	49.22 ×	13.18 ↑
Tanzania	Maize (white)	Morogoro, Wholesale, TZS/100KG	97,201	69.90 ×	114.29 ×	131.36 ×	58.05 ×
Tanzania	Maize (white)	Moshi, Wholesale, TZS/100KG	60,000	0.00 ●	9.09 ↑	0.21 ▲	-8.40 ↓
Uganda	Maize (white)	Kabale, Wholesale, USh/KG	856	-28.22 ↓	-18.56 ↓	1.36 ▲	43.02 ×
Uganda	Maize (white)	Kampala, Wholesale, USh/KG	821	-29.81 ↓	-21.91 ↓	0.98 ▲	23.41 ×
Uganda	Maize (white)	Lira, Wholesale, USh/KG	819	-15.37 ↓	-11.97 ↓	8.32 ↑	39.35 ×
Uganda	Maize (white)	Masindi, Wholesale, USh/KG	760	-22.98 ↓	-18.35 ↓	1.22 ▲	46.08 ×

Note: Last price is for January 2022, *February, **December, ***November and ****October

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

Compared to the previous 12 months, bean prices were lower in all the selected East African markets. Except for selected markets in Tanzania, beans prices were lower than their levels 3-6 months ago in almost all Rwanda

³⁶ Kenya Business Daily: <https://www.businessdailyafrica.com/bd/markets/commodities/rising-maize-prices-push-up-flour-prices-to-a-four-year-high-3715452>

³⁷ FEWSNET. <https://fews.net/east-africa/rwanda>

³⁸ <https://fews.net/east-africa/south-sudan>

³⁹ Author's construction based on data from WFP (2021) and FAO (2021)

and Uganda selected markets. Beans prices have, however, been up higher than their previous levels a month ago in all selected East African markets. Off-season changes and global inflationary pressures⁴⁰ are attributed to these price dynamics.

Table 5: Changes in bean prices in selected East African Countries⁴¹

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Rwanda	Bean (dry)	Kabuga, Retail, RWFKG*	250	2.04 ▲	-9.64 ↓	-25.37 ↓	-40.94 ↓
Rwanda	Bean (dry)	Kigeme (Camp), Retail, RWFKG*	350	7.69 ↑	-9.07 ↓	-23.64 ↓	-30.46 ↓
Rwanda	Bean (dry)	Mugera, Retail, RWFKG*	275	10.44 ↑	-14.10 ↓	-37.41 ↓	-44.40 ↓
Rwanda	Bean (dry)	Nyabiheke (Camp), Retail, RWFKG*	307	22.67 ⊗	8.24 ↑	-31.47 ↓	-30.30 ↓
Tanzania	Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	174,375	11.30 ↑	11.16 ↑	11.84 ↑	-0.92 ↘
Tanzania	Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	208,167	-0.14 ↘	13.06 ↑	3.38 ▲	-0.52 ↘
Tanzania	Bean (dry)	Kigoma, Wholesale, TZS/100KG	132,500	11.97 ↑	-7.02 ↓	7.72 ↑	-15.12 ↓
Tanzania	Bean (dry)	Morogoro, Wholesale, TZS/100KG	192,500	0.65 ▲	6.94 ↑	6.45 ↑	-9.77 ↓
Tanzania	Bean (dry)	Moshi, Wholesale, TZS/100KG	185,000	0.00 ●	23.33 ⊗	-6.72 ↓	-9.76 ↓
Uganda	Bean (dry)	Kampala, Wholesale, USh/KG	1,614	7.39 ↑	-4.68 ↘	-13.13 ↓	-36.01 ↓
Uganda	Bean (dry)	Lira, Wholesale, USh/KG	1,516	3.87 ▲	-6.26 ↓	-3.87 ↘	-21.27 ↓

Note: Last price is for January 2022, *February, **December, ***November and ****October

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

Sorghum prices in Addis Ababa have declined slightly compared to the last 1-3 months, although these prices are still higher than those of the past 6-12 months. In Rwanda, except for the Kabuga market, almost all other selected markets have had lower prices than in the past 1-12 months. Similarly, in South Sudan, except the Juba market, sorghum prices were lower than in the past 6-12 months. Prices have, however, increased over the past 1-3 months, except in Rumbek.

Table 6: Changes in sorghum prices in selected East African Countries⁴²

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Ethiopia	Sorghum (red)	Addis Ababa, Ethiopian Birr/KG	24	-10.85 ↓	2.56 ▲	21.58 ⊗	76.47 ⊗
Ethiopia	Sorghum (white)	Addis Ababa, Ethiopian Birr/KG**	29	-15.19 ↓	-22.10 ↓	18.66 ⊗	29.88 ⊗
Rwanda	Sorghum	Kabuga, Retail, RWF/KG	600	22.95 ⊗	21.39 ⊗	38.65 ⊗	33.33 ⊗
Rwanda	Sorghum	Kigeme (Camp), Retail, RWF/KG	500	-9.09 ↓	-9.09 ↓	0.00 ●	4.89 ▲
Rwanda	Sorghum	Mugera, Retail, RWF/KG	380	-15.56 ↓	-8.98 ↓	-1.30 ↘	-15.56 ↓
Rwanda	Sorghum	Nyabiheke (Camp), Retail, RWF/KG	400	-11.11 ↓	-5.88 ↓	14.29 ↑	-16.67 ↓
South Sudan	Sorghum	Aweil, Retail, South Sudanese Pound/KG	135	34.58 ⊗	74.45 ⊗	-2.48 ↘	-48.47 ↓
South Sudan	Sorghum	Juba, Retail, South Sudanese Pound/KG	388	4.14 ▲	6.68 ↑	17.69 ⊗	-7.31 ↓
South Sudan	Sorghum	Rumbek, Retail, South Sudanese Pound/KG**	186	0.00 ●	-7.14 ↓	-48.00 ↓	-36.59 ↓
South Sudan	Sorghum	Wau, Retail, South Sudanese Pound/KG	277	11.53 ↑	16.08 ⊗	-2.91 ↘	-19.42 ↓

Note: Last price is for January 2022, *February, **December, ***November and ****October

⁴⁰ RATIN. https://ratin.net/site/news_article/11214

⁴¹ Author's construction based on data from WFP (2021) and FAO (2021).

⁴² Author's construction based on data from WFP (2021) and FAO (2021).

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

Southern Africa

Key drivers of maize prices in the Southern Africa region⁴³



Seasonal Changes

The off-season period and reduced food stocks contribute to price surges typical in the region in this period.



Conflicts in Mozambique

The effects of conflicts in parts of Mozambique continue to affect farming and trading activities putting upward pressure on food prices.

Malawi experienced the most price surges, higher than the price levels for the past 1-6 months, with the national average maize prices ranging from 25% - 46%. However, Malawi's current maize prices are lower than their one year levels. Seasonality factors and speculative activities are driving the surge in prices by traders given weather shocks experienced by the country since October 2021.⁴⁴ Although selected markets in Mozambique and Zambia show declining or stable maize prices, the Zambian national average maize price shows a moderate increase (3-14%). The lower maize prices in Mozambique and Zambia are due to enough existing stocks from the previous harvest season.

Table 7: Changes in maize prices in selected Southern African Countries⁴⁵

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Malawi	Maize (white)	Lilongwe, Retail, MWK/KG**	152	8.96 ↑	26.67 ⊗	26.67 ⊗	-0.24 ▾
Malawi	Maize (white)	Mzimba, Retail, MWK/KG	125	13.64 ↑	28.87 ⊗	21.36 ⊗	-0.33 ▾
Malawi	Maize (white)	Mzuzu, Retail, MWK/KG	150	12.78 ↑	14.50 ↑	7.45 ↑	-0.17 ▾
Malawi	Maize (white)	National Average, Retail, MWK/KG	191	25.66 ⊗	29.05 ⊗	46.25 ⊗	-0.07 ▾
Malawi	Maize (white)	Nsanje, Retail, MWK/KG	226	32.94 ⊗	40.37 ⊗	50.07 ⊗	-0.03 ▾
Mozambique	Maize (white)	Angónia, Retail, MZN/KG	13				-22.23 ▼
Mozambique	Maize (white)	Maputo, Retail, MZN/KG	26	-31.58 ▼	-30.93 ▼	0.74 ▲	-20.01 ▼
Mozambique	Maize (white)	Massinga, Retail, MZN/KG	32	-0.97 ▾	0.82 ▲	107.84 ⊗	5.22 ↑
Zambia	Maize (white)	Chibombo, Retail, ZMW/KG***	3	0.00 ●	0.00 ●	-32.05 ▼	-22.08 ▼
Zambia	Maize (white)	Chipata, Retail, ZMW/KG***	3	12.80 ↑	-6.00 ▾	-40.19 ▼	-15.32 ▼
Zambia	Maize (white)	Livingstone, Retail, ZMW/KG***	3	0.00 ●	0.00 ●	-44.75 ▼	-19.12 ▼
Zambia	Maize (white)	Lusaka, Retail, ZMW/KG***	3	2.05 ▲	3.56 ▲	-38.50 ▼	-7.92 ▼
Zambia	Maize (white)	Mpika, Retail, ZMW/KG***	3	15.38 ⊗	0.00 ●	-43.50 ▼	3.81 ▲
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	5	14.18 ↑	12.03 ↑	6.98 ↑	2.81 ▲

Note: Last price is for January 2022, *February, **December, ***November and ****October

● = 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 FEWSNET, 2022. <https://fews.net/southern-africa>. Accessed 2nd March 2022

⁴⁴ FEWSNET, 2022. <https://fews.net/southern-africa>. Accessed 2nd March 2022

⁴⁵ Author's construction based on data from WFP (2021) and FAO (2021).

West Africa

Key drivers of the price movements in West Africa include:



Weather Shocks

Poor rainfalls during the 2021 season affected harvests contributing to higher grain prices.



Insecurity & Armed Conflicts

Insecurity and armed conflicts continue to disrupt economic activities in the region, reducing grain availability and causing higher prices.



Economic Shocks

Foreign exchange depreciation in most countries of the region is putting inflationary pressures on commodity prices in the region.

Maize prices are generally higher than their one-year level for all selected markets in West Africa. However, compared to the past 1-6 months, maize prices show mixed results. In Cote d'Ivoire, maize prices have declined in the two selected markets over the past 1-6 months. Similarly, in Ghana, most markets have generally seen lower prices than they were 1-6 months ago, with others experiencing a moderate increase in prices. In Mali, maize prices have generally declined against their previous month's level but were generally higher than they were 3-6 months ago. Nigeria's maize prices were higher than a month ago but lower than they were 3-6 months ago. Togo generally had higher maize prices than in the past 1-12 months, although few markets have experienced stable or price declines. Generally, most countries had new harvests in the November-December 2021 period, which have resulted in price declines or stability. However, conflicts, macroeconomic conditions, and high transport costs continue to put upward pressure on commodity prices across the region.⁴⁶

Table 8: Changes in maize prices in selected West African countries⁴⁷

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cote d'Ivoire	Maize (white)	Korhogo, Retail, XOF/KG	222		-7.07 ↓	-5.11 ↓	-11.25 ↓
Cote d'Ivoire	Maize (white)	Man, Retail, XOF/KG*	238	-9.09 ↓	0.00 ●	-52.50 ↓	18.75 ×
Ghana	Maize (white)	Accra, Wholesale, GHS/100KG**	320	-1.37 ↔	8.27 ↑	0.00 ●	87.01 ×
Ghana	Maize (white)	Bolga, Wholesale, GHS/100KG**	259	5.38 ↑	-8.90 ↓	19.63 ×	47.84 ×
Ghana	Maize (white)	Kumasi, Wholesale, GHS/100KG**	405	-4.17 ↔	-6.59 ↓	5.08 ↑	110.16 ×
Ghana	Maize (white)	Techiman, Wholesale, GHS/100KG**	215	-5.89 ↓	-28.33 ↓	-6.93 ↓	21.47 ×
Mali	Maize (white)	Ansongo, Retail, XOF/KG	275	0.00 ●	10.00 ↑	11.34 ↑	37.50 ×
Mali	Maize (white)	Badalabougou, Retail, XOF/KG	275	-4.51 ↔	10.00 ↑	22.22 ×	57.14 ×
Mali	Maize (white)	Faladié, Retail, XOF/KG	250	0.00 ●	0.00 ●	14.16 ↑	42.86 ×
Mali	Maize (white)	Gao, Retail, XOF/KG	300	0.00 ●	18.58 ×	33.33 ×	33.33 ×
Mali	Maize (white)	Kayes Centre, Retail, XOF/KG	300	17.19 ×	4.17 ▲	20.00 ×	47.78 ×
Mali	Maize (white)	Niarela, Retail, XOF/KG	250	0.00 ●	0.00 ●	14.16 ↑	42.86 ×
Nigeria	Maize (white)	Ibadan, Wholesale, Naira/KG**	223		-16.48 ↓	-6.46 ↓	34.34 ×
Nigeria	Maize (white)	Kano, Wholesale, Naira/KG**	217	17.05 ×	2.22 ▲	-8.90 ↓	42.15 ×
Nigeria	Maize (white)	Kaura Namoda, Wholesale, Naira/KG**	198	15.85 ×	-8.23 ↓	-17.31 ↓	22.99 ×
Nigeria	Maize (white)	Lagos, Wholesale, Naira/KG***	205	5.06 ↑	-25.71 ↓	-6.10 ↓	40.68 ×
Nigeria	Maize (white)	Maiduguri, Wholesale, Naira/KG**	195	12.12 ↑	-14.19 ↓	-10.97 ↓	29.87 ×
Togo	Maize (white)	Amegnran, Retail, CFA Franc BCEAO/KG	297	0.00 ●	29.13 ×	21.22 ×	112.14 ×
Togo	Maize (white)	Anie, Retail, CFA Franc BCEAO/KG	250	0.00 ●	26.26 ×	-1.96 ↔	56.25 ×
Togo	Maize (white)	Cinkassé, Retail, CFA Franc BCEAO/KG	242	-1.22 ↔	0.83 ▲	-5.10 ↓	71.63 ×
Togo	Maize (white)	Kara, Retail, CFA Franc BCEAO/KG	269	6.32 ↑	19.56 ×	0.37 ▲	40.10 ×
Togo	Maize (white)	Kor bongou, Retail, CFA Franc BCEAO/KG	250	4.17 ▲	19.05 ×	8.70 ↑	78.57 ×
Togo	Maize (white)	Lomé, Retail, CFA Franc BCEAO/KG	350	14.75 ↑	32.08 ×	25.00 ×	82.29 ×

Note: Last price is for January 2022, *February, **December, ***November and ****October

⁴⁶ FEWSNET. <https://fews.net/west-africa>. Accessed 2nd March 2022

⁴⁷ Author's construction based on data from WFP (2021) and FAO (2021).

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

Millet prices are overall higher than their levels in 1-12 months across all the selected West African markets. However, these price increases have slowed down, particularly in Burkina Faso, which declined over the past month. Niger and Nigeria have also shown millet price declines or low-moderate price increases compared to the past 3-6 months. The price declines or the slowing down of price surges are likely due to the harvests of new crops across the region in the late 2021 cropping season, while insecurity and armed conflicts in the region continue to perpetuate higher prices than they were a year ago.

Table 9: Changes in millet prices in selected West African countries⁴⁸

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Burkina Faso	Millet	Batié, Retail, XOF/KG	256	-18.99 ▼	-26.86 ▼	-18.99 ▼	15.84 ⊗
Burkina Faso	Millet	Bousse, Retail, XOF/KG	269	1.13 ▲	25.70 ⊗	20.63 ⊗	50.28 ⊗
Burkina Faso	Millet	Dori, Retail, XOF/KG	333	0.00 ●	19.78 ⊗	21.09 ⊗	33.20 ⊗
Burkina Faso	Millet	Faramana, Retail, XOF/KG	214	7.54 ↑	21.59 ⊗	36.31 ⊗	62.12 ⊗
Burkina Faso	Millet	Gourcy, Retail, XOF/KG	294	1.38 ▲	24.58 ⊗	28.95 ⊗	33.03 ⊗
Burkina Faso	Millet	Ouagadougou (Sankaryare), Retail, XOF/KG	304	-17.17 ▼	22.58 ⊗	22.58 ⊗	22.09 ⊗
Burkina Faso	Millet	Ouargaye, Retail, XOF/KG	249	-4.60 ▾	-1.19 ▾	7.33 ↑	26.40 ⊗
Burkina Faso	Millet	Titao, Retail, XOF/KG	254	-1.55 ▾	19.81 ⊗	24.51 ⊗	56.79 ⊗
Mali	Millet	Ansongo, Retail, XOF/KG	325	3.17 ▲	30.00 ⊗	62.50 ⊗	38.30 ⊗
Mali	Millet	Badalabougou, Retail, XOF/KG	300	0.00 ●	26.05 ⊗	40.85 ⊗	45.63 ⊗
Mali	Millet	Faladié, Retail, XOF/KG	300	2.04 ▲	33.33 ⊗	50.00 ⊗	50.00 ⊗
Mali	Millet	Gao, Retail, XOF/KG	343	3.63 ▲	29.43 ⊗	29.43 ⊗	29.43 ⊗
Mali	Millet	Kayes Centre, Retail, XOF/KG	300	-0.99 ▾	2.04 ▲	9.89 ↑	16.28 ⊗
Mali	Millet	Niarela, Retail, XOF/KG	275	2.23 ▲	22.22 ⊗	37.50 ⊗	37.50 ⊗
Niger	Millet	Abalak, Retail, XOF/KG	345	4.86 ▲	13.11 ↑	2.68 ▲	18.15 ⊗
Niger	Millet	Bonkaney, Retail, XOF/KG	290	2.47 ▲	1.40 ▲	-1.36 ▾	19.83 ⊗
Niger	Millet	Goure, Retail, XOF/KG	314	6.08 ↑	6.08 ↑	-10.54 ▼	10.56 ↑
Niger	Millet	Katakoto, Retail, XOF/KG	294	2.08 ▲	3.89 ▲	0.00 ●	25.64 ⊗
Nigeria	Millet	Ibadan, Wholesale, Naira/KG**	262	-6.43 ▼	-6.43 ▼	7.38 ↑	54.12 ⊗
Nigeria	Millet	Kano, Wholesale, Naira/KG**	217	4.79 ▲	5.58 ↑	-8.85 ▼	41.74 ⊗
Nigeria	Millet	Kaura Namoda, Wholesale, Naira/KG**	230	4.24 ▲	6.16 ↑	-5.17 ▼	39.92 ⊗
Nigeria	Millet	Lagos, Wholesale, Naira/KG**	265	5.58 ↑	-3.14 ▾	2.71 ▲	31.32 ⊗
Nigeria	Millet	Maiduguri, Wholesale, Naira/KG**	212	3.41 ▲	-8.62 ▼	0.47 ▲	35.03 ⊗

Note: Last price is for January 2022, *February, **December, ***November and ****October

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

Sorghum prices are overall higher than they were a year ago in almost all selected West African markets. In Mali and Niger, with few exceptions, particularly in Gao, most current sorghum prices are higher than 1-12 months ago. However, in Nigeria, sorghum prices have mostly declined against their previous levels in 1-6 months. Similarly, Togo also experienced lower, stable or low-moderate increase in sorghum prices. Generally, existing stocks from previous season harvests have allowed price stability and declines in some markets.

⁴⁸ Author's construction based on data from WFP (2021) and FAO (2021)

However, the decline in crop production as a result of drought and insecurity in parts of the region have caused prices to be higher in some parts of the region and/or above their levels a year ago.⁴⁹

Table 10: Changes in sorghum prices in selected West African countries⁵⁰

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Mali	Sorghum	Ansongo, Retail, XOF/KG	250	0.00 ●	6.38 ↑	11.11 ↑	11.11 ↑
Mali	Sorghum	Badalabougou, Retail, XOF/KG	275	4.56 ▲	15.55 ⊗	37.50 ⊗	37.50 ⊗
Mali	Sorghum	Faladié, Retail, XOF/KG	256	2.40 ▲	28.00 ⊗	28.00 ⊗	28.00 ⊗
Mali	Sorghum	Gao, Retail, XOF/KG	250	0.00 ●	0.00 ●	0.00 ●	0.00 ●
Mali	Sorghum	Kayes Centre, Retail, XOF/KG	308	2.67 ▲	17.11 ⊗	23.20 ⊗	36.89 ⊗
Mali	Sorghum	Niarela, Retail, XOF/KG	269	7.60 ↑	22.83 ⊗	34.50 ⊗	53.71 ⊗
Niger	Sorghum	Abalak, Retail, XOF/KG	329	3.46 ▲	-9.37 ↓	2.17 ▲	18.35 ⊗
Niger	Sorghum	Bonkaney, Retail, XOF/KG	292	-0.68 ▾	6.18 ↑	1.39 ▲	25.32 ⊗
Niger	Sorghum	Goure, Retail, XOF/KG	280	1.82 ▲	2.56 ▲	-12.77 ↓	19.66 ⊗
Niger	Sorghum	Katako, Retail, XOF/KG	294	3.16 ▲	-1.34 ▾	-1.01 ▾	28.38 ⊗
Nigeria	Sorghum	Ibadan, Wholesale, Naira/KG**	262	-6.43 ↓	-6.43 ↓	5.82 ↑	28.43 ⊗
Nigeria	Sorghum	Kano, Wholesale, Naira/KG**	198	12.24 ↑	-15.07 ↓	-17.55 ↓	42.13 ⊗
Nigeria	Sorghum	Kaura Namoda, Wholesale, Naira/KG**	241	-3.57 ▾	-4.13 ▾	-2.49 ▾	47.81 ⊗
Nigeria	Sorghum	Lagos, Wholesale, Naira/KG**	242	-13.41 ↓	-13.22 ↓	-1.87 ▾	16.27 ⊗
Nigeria	Sorghum	Maiduguri, Wholesale, Naira/KG**	194	2.11 ▲	-17.09 ↓	1.04 ▲	22.78 ⊗
Togo	Sorghum	Anie, Retail, CFA Franc BCEAO/KG	297	0.00 ●	-1.00 ▾	-1.00 ▾	41.43 ⊗
Togo	Sorghum	Cinkassé, Retail, CFA Franc BCEAO/KG	235	6.82 ↑	6.82 ↑	3.98 ▲	48.73 ⊗
Togo	Sorghum	Kara, Retail, CFA Franc BCEAO/KG	276	0.00 ●	-12.38 ↓	-10.97 ↓	15.00 ↑
Togo	Sorghum	Kor bongou, Retail, CFA Franc BCEAO/KG	247	0.82 ▲	12.27 ↑	7.39 ↑	33.51 ⊗
Togo	Sorghum	Lomé, Retail, CFA Franc BCEAO/KG	315	0.00 ●	10.53 ↑	0.00 ●	17.54 ⊗

Note: Last price is for January 2022, *February, **December, ***November and ****October

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

⁴⁹ FEWSNET. <https://fews.net/west-africa>. Accessed 2nd March 2022

⁵⁰ Author's construction based on data from WFP (2021) and FAO (2021)



Climatic Conditions and Potential Implications for Food and Nutrition Security

The March-April-May (MAM) rainfall season contributes about 70 percent of total annual rainfall and constitutes an important season in the equatorial parts of the East Africa region⁵¹. The seasonal forecasts indicate a wetter than normal season in the central and southern parts of the region covering northern, central and southern Tanzania, eastern parts of Uganda, Rwanda and South Sudan, northern Burundi and southern and western Kenya. The expected wetter than normal season follows almost two consecutive drought years that affected most parts of the region, and the impacts will be felt much longer. The rainfall forecast presents favourable cropping conditions over the main growing areas in the respective countries where wetter than normal conditions are expected (Figures 10 and 11). This is important to improve agricultural production, especially in the region's strategic food-producing areas. The improvements in food production would help facilitate regional food trade and humanitarian assistance to food deficit areas, ensuring nutritious and healthy food is readily available.

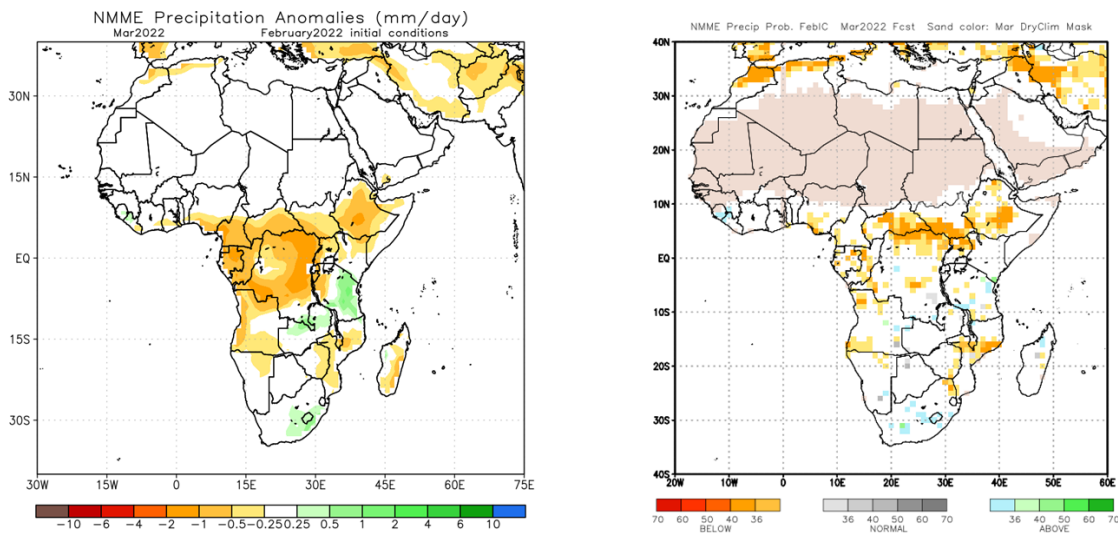


Figure 10: North American Multi-Model Ensemble (NMME) rainfall forecast for March 2022 based on February 2022 initial conditions⁵²

Despite wetter than normal season projections for most parts of the Southern Africa region at the end of last year, current conditions and forecasts for the next three months indicate below-average rainfall for most parts of the region. Parts of the region, including Angola, Madagascar, Malawi, Mozambique, Namibia, South Africa, Zambia, and Zimbabwe, have experienced erratic and below-average rainfall and hot temperatures. On the contrary, parts of Madagascar, Malawi and Mozambique suffered from Tropical Storm Ana in late January, with devastating impacts on agricultural livelihoods and other sectors. The rainfall conditions have contributed to mixed crop conditions in the ongoing main cropping season. As of the end of January, most parts of Malawi, Zimbabwe, and the northern parts of Mozambique presented 'watch' crop conditions while central and western parts of Zambia and southern parts of Mozambique show favourable cropping conditions. The mixed crop conditions point would negatively impact bumper seasonal harvests projected at the end of last year for most parts of the region. The outlook indicates that some areas would have good harvests while others would receive below-average seasonal harvests. Regional food trade and humanitarian assistance would continue to play an

⁵¹ https://www.icpac.net/documents/517/GHACOF_60_Summary_for_Decision_Makers_i8LSaG1.pdf. Accessed 28 February 2022.

⁵² The image on the left shows the probabilistic forecast and the right image shows the standardized forecast anomaly (the average across the models). The orange/red and green colours indicate the dominant category (below-normal or above-normal) forecast by the NMME models – colour intensity shows the corresponding probability of the forecast. White indicates where there is disagreement amongst models as the most likely tercile category. Original images are available at www.cpc.ncep.noaa.gov and <https://iri.columbia.edu/our-expertise/climate/forecasts/seasonal-climate-forecasts/> Accessed 28 February 2022.

important role in helping the affected areas adapt to food deficits and stabilise food prices due to climate change variability.

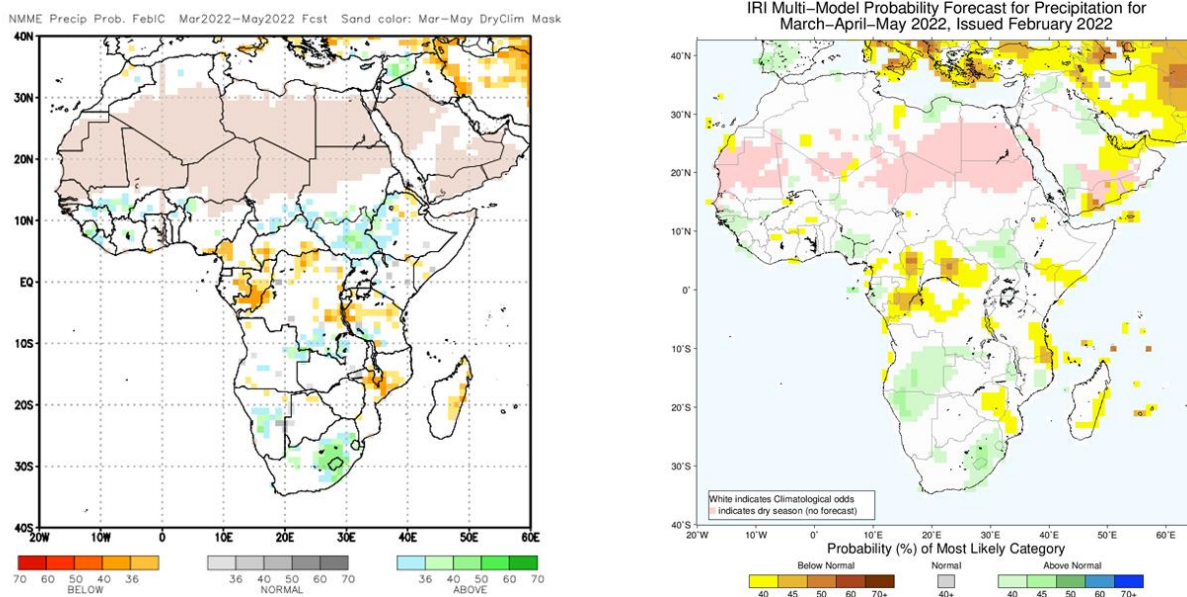


Figure 11: North American Multi-Model Ensemble (NMME) rainfall forecast for the March-May 2022, based on February 2022 initial conditions⁵³

The rainfall forecasts for March-April-May indicate normal to above-normal rainfall for most parts of the West Africa region. As of the end of January, the crop conditions were also favourable and exceptional (in the case of southern Ghana). The favourable crop conditions are important for the new upcoming cropping season. Following good harvests in the main cereals season, a favourable cropping season would further improve food supplies across the region. On the contrary, Burkina Faso and Mali (part of the Sahel region) show below-normal rainfall and poor crop conditions. Similar to other regions, regional food trade and humanitarian efforts should be scaled up to ensure food availability in areas impacted by unfavourable climatic conditions and ongoing conflicts such as parts of Mali and Burkina Faso.

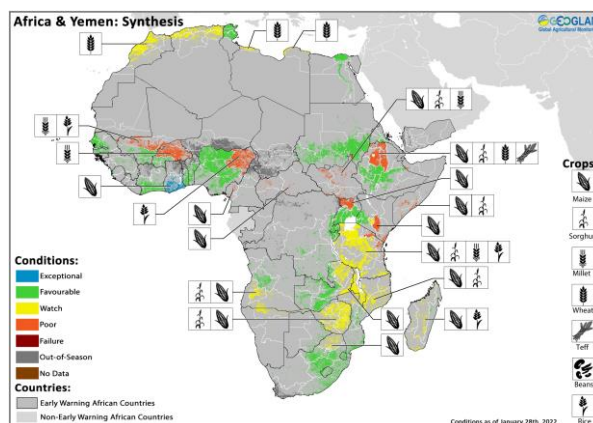


Figure 12: Synthesis of crop conditions as of January 28th

⁵³ The image on the left shows the probabilistic forecast and the right image shows the standardized forecast anomaly (the average across the models). The orange/red and green colours indicate the dominant category (below-normal or above-normal) forecast by the NMME models – colour intensity shows the corresponding probability of the forecast. White indicates where there is disagreement amongst models as the most likely tercile category. Original images are available at www.cpc.ncep.noaa.gov and <https://iri.columbia.edu/our-expertise/climate/forecasts/seasonal-climate-forecasts/> Accessed 28 February 2022.



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