FOOD SECURITY MONITOR

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AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

Contents

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

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

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 September Food Security Monitor are summarised below:

Global Market Update

Global grain prices are generally low amidst increased supplies. The International Grain Council (IGC) Grains and Oilseeds Index (GOI) declined by 4.01% in September compared to August. Nonetheless, rice prices are of concern in the wake of bans by India. Fertilizer prices also remain low due to low offseason demands.

Regional Food Security Updates

In East Africa, food insecurity remains a concern in most countries except in Rwanda. Many households in East Africa are experiencing IPC 3 and above conditions driven by conflicts and past climatic shocks.

In Southern Africa, mostly IPC 2 and 3 conditions persist across the Southern African region as the lean season begins in the region and due to the aftermath of the past climatic shocks.

In West Africa, food insecurity remains a concern across Burkina Faso, Mali, and Niger as IPC 3 and above conditions are observed across many parts of these countries. The main driver of this condition is the disruption of agricultural, trading, and food assistance activities due to conflicts and insecurity.

Food Trade

In East Africa, the East African Community partner states have through their standards regulators agreed on 11 measures aimed at improving the standard of food products on the market. The move is also aimed at ensuring the protection of local consumers against food-borne diseases and a smooth flow of trade within the region.

In Southern Africa, the European Union 11th Development Programme will support the upgrade of the Tunduma border post to facilitate trade flow along the Zambia-Tanzania corridor to the tune of Euros 2.638 million project.

In West Africa, ECOWAS to begin the construction of the 1028-kilometer Abidjan-Lagos highway project in January 2024. The project which cuts across and connects major cities and traversing Nigeria, Ghana, Togo, Benin Republic, and Cote D'Ivoire, has a significant economic potential.

Commodity Prices

In East Africa, the prices of food commodities are generally reducing due to increased supplies from recently completed harvests, except in Ethiopia where food commodities prices remain high despite ongoing harvest.

In Southern Africa, prices of food commodities remain low in Mozambique but high in Malawi and Zambia as the lean season begins.

In West Africa, mixed trends continued to be observed, with Mali and Ghana experiencing lower prices, Niger and Nigeria experiencing higher prices, while the remaining countries show mixed trends.

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

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 two years. Figure 1 displays the prevalence of IFC in September across 17 countries selected from East, Southern, and West Africa. During this month, three food insecurity hotspots, defined as countries where over 50% of the total population has IFC, were identified viz., Burkina Faso (61.1%), Mali (66.5%), and Niger (67.2%). Meanwhile, the number of people with IFC decreased, compared to last year, in Burkina Faso, Cote d'Ivoire, Ghana, Mali, South Sudan, Tanzania, Togo, Uganda, and Zimbabwe. On the other hand, the average national maize (except Mali which is millet) prices, compared to the past six month declined in Burkina Faso, Cote d'Ivoire, Kenya, Mali, Mozambique, and Uganda. Similarly, compared to the past year, it declined in Burkina Faso, Cote d'Ivoire, Kenya, Mali, Tanzania, and Uganda.

Figure 1: Hunger Hotspots Snapshot, September 2023

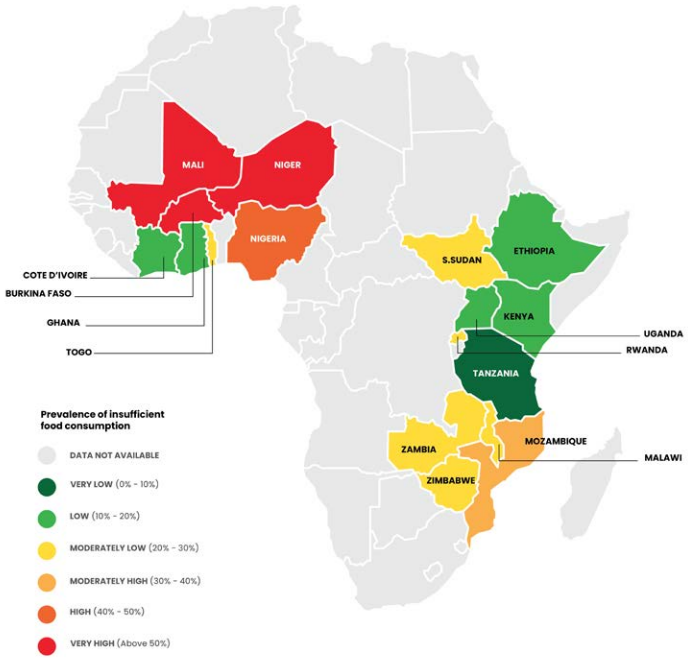


Table 1: IFC and Commodities Price Changes

Country	Change in people with insufficient food consumption from last 1 year	Change in people with insufficient food consumption from last 2 years	Commodity Price Changes in the last 1 year	Commodity Price Changes in the last 6 months
Burkina Faso	-0.82 ↓	5.22 ↑	-10.61 ↓	-0.78 ↓
Cote d'Ivoire	-8.16 ↓	-11.76 ↓	-29.50 ↓	-6.60 ↓
Ethiopia	17.77 ↑	65.71 ↑	49.34 ↑	42.46 ↑
Ghana	-19.40 ↓	-1.82 ↓	58.72 ↑	20.88 ↑
Kenya	15.74 ↑	56.25 ↑	-22.05 ↓	-21.22 ↓
Malawi	36.11 ↑	113.04 ↑	136.73 ↑	93.33 ↑
Mali*	-3.79 ↓	8.55 ↑	-33.11 ↓	-1.52 ↓
Mozambique	18.18 ↑	-9.90 ↓	-16.18 ↓	29.59 ↑
Niger	1.16 ↑	58.18 ↑	19.03 ↑	43.61 ↑
Nigeria	60.91 ↑	41.15 ↑	78.82 ↑	70.50 ↑
Rwanda	21.43 ↑	36.00 ↑	19.21 ↑	17.07 ↑
South Sudan	-53.62 ↓	-52.94 ↓	99.83 ↑	64.16 ↑
Tanzania	-35.48 ↓	-13.04 ↓	11.99 ↑	-13.09 ↓
Togo	-24.00 ↓	-9.52 ↓	1.44 ↑	7.93 ↑
Uganda	-48.05 ↓	-46.31 ↓	-16.53 ↓	-8.39 ↓
Zambia	110.00 ↑	50.00 ↑	49.09 ↑	11.07 ↑
Zimbabwe	-17.31 ↓	-25.86 ↓		

Key: No Change ↑ = increase ↓ = decrease

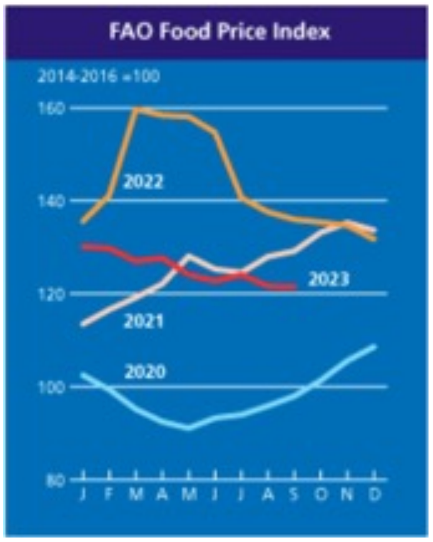
Source: Own analysis based on data from WFP (2023)

Global Market Update

Global Food Prices

The FAO Food Price Index (FFPI) remains almost unchanged from August as declines in the price indices of vegetable oils, dairy and meat was offset by increases in the sugar and cereal price indices. The International Grain Council (IGC) Grains and Oilseeds Index (GOI) declined both over the last one month and year by 4.01% and 16.47%. The drop, compared to the past month, is attributed to drops in the sub-indices of wheat, rice, soyabeans, and barley, except maize which went up by 4.79%. Global rice prices are said to be highest compared to the past 15 years following, particularly, the ban by India on rice exports and the halting of the Black see grain initiative by Russia[3], although the GOI sub-index for rice had dropped by 2.93% compared to the previous month but increased by 35.48% compared to a year ago.

Figure 2: FAO Food Price Index (FFPI)[4]



1. **People with insufficient food consumption refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS).** *The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets, and how frequently food is consumed. The FCS is calculated using the frequency of consumption of eight food groups by a household over 7 days before the survey, using standardized weights for each of the food groups reflecting its respective nutrient density. It then classifies households as having 'poor', 'borderline' or 'acceptable' food consumption.* ***Poor food consumption*** *typically refers to households that do not consume staples and vegetables every day, and never, or very seldom, consume protein-rich food such as meat and dairy (FCS of less than 28).* ***Borderline food consumption*** *typically refers to households that consume staples and vegetables every day, accompanied by oils and pulses a few times a week (FCS of less than 42).* ***Acceptable food consumption typically*** *refers to households that consume staples and vegetables every day, frequently accompanied by oils and pulses, and occasionally meat, fish and dairy (FCS greater than 42).*

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

3 https://ratin.net/site/news_article/13601

4 FAO, 2023. Accessed at https://www.fao.org/worldfoodsituation/foodpricesindex/en/

Table 2: IGC GOI Commodity Price Indices[5]

Jan 2000 = 100	04-Oct	% Change 1M	% Change 1YR
GOI	**255.97**	*-4.01*	*-16.47*
Wheat	**223.05**	*-1.26*	*-28.55*
Maize	**245.75**	*4.79*	*-21.79*
Rice	**244.21**	*-2.93*	*35.48*
Soyabeans	**250.86**	*-7.87*	*-14.65*
Barley	**222.97**	*-2.27*	*-28.40*

Global Fertilizer Prices

The prices of all fertilizer types declined in mid-September compared to mid-August, with Potash declining the most by 10.4%. Compared to a year ago, all types of fertilizers have declined exceeding 25% with potash and urea declining the most by 43% and 31.4% respectively.

Table 3: Global Fertilizer Prices[6]

Date Range	DAP	MAP	POTASH	UREA
Sep 12-16 2022	952	1009	877	808
Oct 10-14 2022	925	986	863	824
Nov 7-11 2022	931	980	853	812
Dec 5-Dec 9 2022	920	950	819	784
Jan 2-Jan 6 2023	876	879	752	739
Jan 30-Feb 3 2023	847	862	704	698
Feb 27-Mar 3 2023	827	827	666	648
Mar 27-31 2023	818	810	644	626
Apr 24-28 2023	827	804	624	595
May 22-26 2023	834	832	624	623
June 19-23 2023	825	827	618	619
July 17-21 2023	807	812	608	596
Aug 14-18 2023	745	762	558	573
Sep 11-15 2023	710	742	500	554
% Change 14 Aug – 15 Sept 2023	-4.7	-2.6	-10.4	-3.3
% Change 16 Sept 2022 – 15 Sept 2023	-25.4	-26.5	-43.0	-31.4

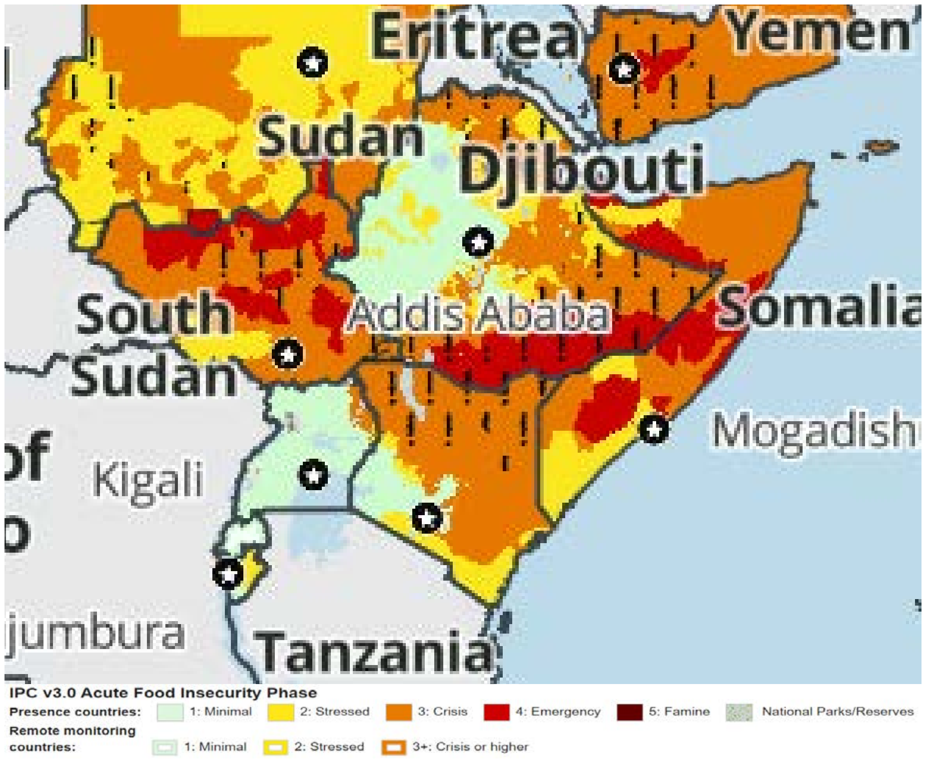
Source: DTN

5 Author's construction based on data from IGC GOI, 2023. Accessed at https://www.igc.int/en/markets/marketinfo-goi.aspx

6 https://www.dtnpf.com/agriculture/web/ag/crops/article/2023/09/20/anhydrous-price-climbs-retail-prices

Food Insecurity Updates

Figure 3: East Africa countries Food Security Outlook, Jun-Sep 2023



East Africa Food Security Update

Conflict, displacement, climate-related shocks, influx of refugees from Sudan, and persistent disease outbreaks continue to be the major drivers of food insecurity in **Ethiopia**[7]. IPC 4 and 5 outcomes persist in southern, southeastern, and northern Ethiopia[8]

Kenya: IPC Phase 2 and 3 outcomes persist in Pastoral households and marginal agricultural areas due to limited food stocks and constrained access to food. Many households in Kenya have also begun to experience higher food costs due to increased fuel prices driven by higher landing costs of fuel, increases in value-added tax, and the removal of subsidies on petroleum products[9].

Rwanda: except among refugees where stressed (IPC Phase 2!) outcomes are expected, IPC Phase 1 outcomes are expected to persist across the country, driven by the availability of food stocks from the Season C harvest and improved trade, and enhanced income from sales of crops or animals, and from employment opportunities[10].

South Sudan: IPC 3 and 4 food security conditions persist in most parts of South Sudan despite on-going harvests. However, Catastrophe (IPC Phase 5) situation remain in parts of Canal/Pigi and Fangak of northern Jonglei, and Fashoda and Panyikang of Upper Nile counties due to influx of returnees and disruption to trade from neighbouring countries[11]. Poor macroeconomic conditions, climatic shocks, localized poor harvests, and conflict and insecurity also continue to drive these conditions.

7 https://reliefweb.int/report/ethiopia/unfpa-ethiopia-humanitarian-response-situation-report-august-2023

8 https://fews.net/east-africa/ethiopia

9 https://fews.net/east-africa/kenya

10 https://fews.net/east-africa/rwanda

11 https://fews.net/east-africa/south-sudan

Uganda: Crisis (IPC Phase 3) outcomes persist in Karamoja area and refugees' settlements due to the delayed and likely below-average green and dry harvests. In greater north and Teso sub-region and bimodal areas IPC Phase 2 and 1 outcomes are expected to persist until the start of the second season harvest[12].

Prevalence of insufficient food consumption

Across six selected East African countries, 54.3 million people did not have enough food for consumption as of September 30, 2023. This is about 5% drop from previous month (57.2 million) suggesting that the food security situation across the monitored countries had improved, driven by declines experienced in Kenya, South Sudan, and Tanzania. The number of food insecure people in the region was also lower in September 2023 than the same time last year (61.8 million) but higher than in 2021(50.8 million). *Table 4* below provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries in September 2023.

Table 4: Prevalence of insufficient food consumption across selected East African countries (August 2023)[13]

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
Ethiopia	101.10	23.20	23.20	22.95	0.00	17.77	65.71
Kenya	51.40	12.50	12.70	24.32	-1.57	15.74	56.25
Rwanda	12.30	3.40	3.40	27.64	0.00	21.43	36.00
South Sudan	11.00	3.20	3.50	29.09	-8.57	-53.62	-52.94
Tanzania	56.30	4.00	4.30	7.10	-6.98	-35.48	-13.04
Uganda	42.70	8.00	8.00	18.74	0.00	-48.05	-46.31

*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%)

Commodity Prices

Key drivers of commodity prices in EA[14]

	Conflicts	Conflicts and insecurity persist particularly in South Sudan which is preventing price recovery from its high levels despite ongoing harvests.
	Seasonal Dynamics	Seasonal harvests are increasing supplies in most markets and causing declines in prices.
	Macroeconomic Shocks	Poor macro-economic conditions, influx of returned refugees, and localized poor harvests have sustained higher prices in South Sudan particularly.

Ethiopia

Despite some declines from previous month, the prices of food commodities remained largely elevated (Table 5). In August, maize prices declined in Bahir Dar Kebele and Bale Robe by 7.22% and 10.26% respectively, while teff prices declined also in Bahir Dar Kebele and Debre Markos by 4.43% and 2.48% respectively, and wheat only declined by 2.17% in Debre Markos. Only teff price in Shashemene had experienced a high increase of 17.04%. Conflicts, the aftermath of droughts, as well as pressure from influx of Sudanese refugees are contributing factors for higher food prices[15].

Table 5: Changes in prices in Ethiopia[16]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Adama city, Retail, ETB/100Kg	5,075.00	12.78	40.97	45.00	61.11
Maize (white)	Bahir Dar kebele, Retail, ETB/100Kg	4,175.00	-7.22	30.47	38.02	47.11
Maize (white)	Bale Robe, Retail, ETB/100Kg	4,200.00	-10.26	21.74	29.23	32.28
Maize (white)	Debre Markos Huseta Gebeya, Retail, ETB/100Kg	4,100.00	0.00	36.67	51.85	50.85
Maize (white)	Shashemene, Retail, ETB/100Kg	4,940.00	3.46	30.00	48.21	55.35
Teff	Adama city, Retail, ETB/100Kg	9,450.00	11.62	11.18	23.27	72.60
Teff	Bahir Dar kebele, Retail, ETB/100Kg	9,175.00	-4.43	26.55	39.54	73.11
Teff	Shashemene, Retail, ETB/100Kg	9,100.00	17.04	16.67	45.23	69.14
Teff (mixed)	Debre Markos Huseta Gebeya, Retail, ETB/100Kg	8,362.50	-2.48	7.21	40.55	62.06
Wheat	Adama city, Retail, ETB/100Kg	6,550.00	13.91	19.09	19.09	45.56
Wheat	Bahir Dar kebele, Retail, ETB/100Kg	5,500.00	0.00	0.00	8.37	17.02
Wheat	Bale Robe, Retail, ETB/100Kg	5,100.00	4.34	4.08	45.71	45.71
Wheat	Debre Markos Huseta Gebeya, Retail, ETB/100Kg	4,891.50	-2.17	2.98	8.39	33.10
Wheat	Shashemene, Retail, ETB/100Kg	6,040.00	4.59	9.82	26.73	28.51

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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Kenya

Overall, the prices of food commodities show lower trends compared to previous months (Table 6). Nonetheless, compared to August, the prices of arrow root, beans (Wairimu), maize, rice, white Irish potato, and white sorghum have experienced increases. Particularly, arrow root, white Irish potato, and white sorghum have had significant increases by 37.14%, 22.88%, and 25.06% respectively. Apart from atypically low market availability following successive below-average production seasons, increase in fuel prices (9 to 20 percent) driven by higher landing costs of fuel, increases in value-added tax, and the removal of subsidies on petroleum products have exacerbated the hikes in food prices[1]. Generally, fertilizer prices17 also remain low compared to previous periods.

Table 6: Changes in prices in Kenya[18]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Arrow Root	National Average Wholesale, KES/90KG*	9,051.43	37.14	-15.74	-4.52	16.15
Beans (Yellow-Green)	National Average Wholesale, KES/90KG*	13,960.10	-3.77	-13.24	-7.26	10.54
Beans Red Haricot (Wairimu)	National Average Wholesale, KES/90KG*	12,525.30	13.10	-4.24	7.27	37.90
Calcium Ammonium Nitrate (USD_50_KG)	National Average USD/50KG	30.49	-7.77	-21.11	-29.76	-36.27
Diammonium Phosphate (USD_50_KG)	National Average USD/50KG	36.53	-5.29	-13.19	-25.33	-32.82
Dry Maize	National Average Wholesale, KES/90KG*	4,906.25	1.59	-28.67	-21.22	-22.05
Finger Millet	National Average Wholesale, KES/90KG*	8,238.00	-4.49	-13.11	-3.98	-8.89
NP 23-23-0 (USD_50_KG)	National Average USD/50KG	37.29	0.59	-11.86	-24.08	-28.22
NPK 17-17-17 (USD_50_KG)	National Average USD/50KG	37.66	-0.21	-11.05	-25.13	-27.49
Red Irish potato	National Average Wholesale, KES/90KG*	3,628.75	-6.96	74.32	51.39	85.28
Red Sorghum	National Average Wholesale, KES/90KG*	6,317.80	-5.59	-4.06	-9.57	2.47
Rice	National Average Wholesale, KES/90KG*	6,307.00	8.74	-9.64	-13.34	2.64
Sweet potatoes	National Average Wholesale, KES/90KG*	5,913.27	-0.55	9.68	30.53	40.84
Urea (USD_50_KG)	National Average USD/50KG	33.27	-7.04	-19.23	-28.62	-39.26
Wheat	National Average Wholesale, KES/90KG*	5,202.00	-19.41	-28.50	-26.74	-24.85
White Irish potato	National Average Wholesale, KES/90KG*	2,661.67	22.88	-1.23	-23.56	27.46
White Sorghum	National Average Wholesale, KES/90KG*	6,567.67	25.06	-4.11	-0.60	1.27

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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12 https://fews.net/east-africa/uganda

13 https://hungermap.wfp.org/

14 https://fews.net/east-africa .

15 https://reliefweb.int/report/ethiopia/unfpa-ethiopia-humanitarian-response-situation-report-au-gust-2023

16 Author's construction based on Ethiopia's Ministry of Trade and Industry and Ethiopian Agricultural Transformation Agency data. http://www.nmis.et/#/

17 https://fews.net/east-africa/kenya

18 *Ministry of Agriculture, Livestock, Fisheries and Co-operatives, Kenya (2023)*

Rwanda

The prices of food commodities recorded in August in Rwanda generally show lower trends (Table 7) driven by the availability of household food stocks from the ongoing Season C harvest.19 Compared to July, the prices of beans and maize were only moderately high in Mugera at 10.64% and 6.93% respectively, whereas sorghum price was also only high in Kabuga by 8.64%. The current prices are, however, higher than they were a year ago in all monitored markets. All fertilizer prices also remain low due to low off-season demand.

Table 7: Changes in prices in Rwanda[20]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Kabuga, Retail, RWF/KG	1,037.50	-0.40	15.28	9.72	41.08
Bean (dry)	Kigeme, Retail, RWF/KG	1,171.25	0.52	-7.29	2.51	58.63
Bean (dry)	Mugera, Retail, RWF/KG	1,064.10	10.64	-11.94	-1.01	72.25
Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG	1,099.46	0.15	-12.59	-12.67	58.02
DAP	National Average USD/50KG	54.08	-7.51	-10.14		
Maize (white)	Kabuga, Retail, RWF/KG	675.00	-0.66	19.12	62.00	27.56
Maize (white)	Kigeme, Retail, RWF/KG	607.92	0.75	13.45	16.48	19.00
Maize (white)	Mugera, Retail, RWF/KG	481.60	6.93	-4.54	-2.28	16.83
Maize (white)	Nyabiheke (Camp), Retail, RWF/KG	498.72	-0.67	-7.76	-7.93	13.43
NPK 17-17-17	National Average USD/50KG	54.68	-5.04	-4.56		
Sorghum	Kabuga, Retail, RWF/KG	733.33	8.64	4.76	10.00	22.22
Sorghum	Kigeme, Retail, RWF/KG	616.67	-2.63	-5.13	-5.13	7.25
Sorghum	Mugera, Retail, RWF/KG	575.00	-4.17	4.55	2.68	35.29
Urea	National Average USD/50KG	41.62	-17.67	-20.01		

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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South Sudan

Generally, the current price of the food commodities monitored remain lower than the previous month due to onset of the green harvest but mostly higher than they were 3-12 months ago (Table 8). Compared to July, the prices of maize had only increased in Gogrial and Wau by 33.33% and 5.01% respectively, while sorghum recorded an increase of 7.01% and 5.01% in Rumbek and Wau respectively. The higher prices above previous 3-12 months are a result of several factors including conflicts, underlying poor macro-economic conditions, influx of returned refugees, and localized poor harvests.

Table 8: Changes in prices in South Sudan[21]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Juba, RWF/KG	936.08	-2.30	1.30	-2.59	45.21
Groundnuts	Juba, RWF/KG	1,873.00	-4.24	13.93	7.64	22.66
Maize (white)	Aweil, SSP/KG	453.88	-2.82	7.37	22.17	14.17
Maize (white)	Gogrial, SSP/KG**	686.40	33.33	41.18	60.00	242.86
Maize (white)	Juba, RWF/KG	846.56	-4.52	9.10	5.98	32.02
Maize (white)	Rumbek, RWF/KG	1,086.80	-15.56	78.82	77.74	111.11
Maize (white)	Torit, SSP/KG**	750.75	-25.00	-1.57	87.50	45.83
Maize (white)	Wau, SSP/KG**	858.00	5.01	50.00	50.00	79.96
Maize (white)	Yambio, SSP/KG	614.90	-27.73	-8.51	145.71	172.84
Sorghum (Feterita)	Aweil, SSP/KG	788.22	-1.82	18.84	60.51	44.37
Sorghum (Feterita)	Bor, SSP/KG**	1,334.62	-6.67	33.33	115.34	133.32
Sorghum (Feterita)	Gogrial, RWF/KG	264.55	-7.50	-41.68	-26.99	22.35
Sorghum (Feterita)	Juba, RWF/KG	932.36	-0.88	5.37	2.74	46.19
Sorghum (Feterita)	Rumbek, RWF/KG	1,036.75	7.01	55.38	74.70	109.17
Sorghum (Feterita)	Wau, SSP/KG**	858.00	5.01	50.00	50.00	76.47
Wheat (flour)	Juba, RWF/KG	1,547.00	-3.67	17.29	18.36	0.06

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Tanzania

The prices of food commodities in Tanzania generally remain lower than previous months due mainly to available stocks from the recently completed harvest (Table 9). The prices of beans however remain 1.87% and 2.7% higher in Dodoma and Moshi, while the price of maize had significantly increased by 41.18% in Dodoma, and rice had experienced low increase in Arusha and Moshi by 3.41% and 2.36% respectively. The current prices, however, remain elevated above what they were a year ago.

Table 9: Changes in prices in Tanzania[22]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Arusha (urban), Wholesale, TZS/100KG	226,818.00	-1.38	-13.10	-23.11	17.32
Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG	272,500.00	1.87	-12.10	-11.38	23.86
Bean (dry)	Morogoro, Wholesale, TZS/100KG	252,727.00	-3.93	-4.63	-18.91	13.33
Bean (dry)	Moshi, Wholesale, TZS/100KG	285,000.00	2.70	5.56	-18.57	
Maize (white)	Arusha (urban), Wholesale, TZS/100KG	93,455.00	-0.28	-17.95	-14.00	-1.67
Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG	120,000.00	41.18	-0.83	1.59	35.45
Maize (white)	Morogoro, Wholesale, TZS/100KG	89,330.00	-6.68	-13.70	-21.26	2.19
Maize (white)	Moshi, Wholesale, TZS/100KG	112,500.00	-3.23	-6.25	-18.67	
Rice (Wholesale)	Arusha (urban), TZS/100KG	259,091.00	3.41	-7.14	-13.52	15.15
Rice (Wholesale)	Dodoma (Majengo), TZS/100KG	252,500.00	-3.81	-19.84	-9.96	7.47
Rice (Wholesale)	Morogoro, TZS/100KG	263,636.00	-15.11	-7.82	-11.85	21.21
Rice (Wholesale)	Moshi, TZS/100KG	325,000.00	2.36	4.84	0.00	

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Uganda

Overall, the prices of beans and maize remain largely lower in Uganda in August than the past months due mainly to increased availability of food stocks from the recently concluded harvests (Table 10). The prices of maize recorded in August is well below what was recorded in the past 1-12 months in almost all markets, whereas the prices of beans are lower than they were in the past 1-3 months but mostly higher than the past 6-12 months in most markets. There are also high prospects of prices remaining lower over the next 3-6 months for both beans and maize. The prices of all types of fertilizer also remain lower compared to past months despite the on-going preparations for the October-December planting season.

19 https://fews.net/east-africa/rwanda

20 Author's construction based on data from WFP (2023).

21 Author's construction based on data from WFP (FAO (2023).

22 Author's construction based on data from WFP (2023).

Table 10: Changes in prices in Uganda[23]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
AMMONIUM SULPHATE	National Average, Retail, UGX/50KG***	175,000.00	0.00	0.00	-2.78			
Beans	Gulu, Wholesale, UGX/KG	6,000.00	-8.23	-8.12	0.00	40.85	-49.42	-46.60
Beans	Lira, Wholesale, UGX/KG	4,000.00	-4.01	-16.23	-11.11	5.26	-55.43	-40.17
Beans	Mbale, Wholesale, UGX/KG	4,500.00	0.00	-18.18	12.50	38.46	-45.06	-55.13
Beans	Mbarara, Wholesale, UGX/KG	5,000.00	-4.76	-2.44	7.14	17.65	-55.90	-38.67
CAN	National Average, Retail, UGX/50KG***	160,000.00	0.00	-8.57	24.80			
DAP	National Average, Retail, UGX/50KG***	165,000.00	0.00	-8.33	-1.32			
Maize	Gulu, Wholesale, UGX/KG	1,529.00	-17.35	-23.55	7.93	-23.55	-11.68	-11.77
Maize	Lira, Wholesale, UGX/KG	1,167.00	-12.45	-28.73	-17.82	-23.87	-31.64	-3.55
Maize	Mbale, Wholesale, UGX/KG	1,450.00	-27.50	-25.64	-23.68	-18.68	-36.08	-34.04
Maize	Mbarara, Wholesale, UGX/KG	2,500.00	0.00	0.00	0.00	0.00	-55.48	-38.22
MAIZE BLEND	National Average, Retail, UGX/50KG***	171,000.00	0.00	-8.56	-20.47			
MICROP	National Average, Retail, UGX/50KG***	160,000.00	-3.03	-10.11	-13.04			
MICROP TOP DRESSING	National Average, Retail, UGX/50KG***	160,000.00	-3.03	-11.11	-12.09			
Urea	National Average, Retail, UGX/50KG***	162,000.00	0.00	-0.61	10.05			

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Seasonal Monitor and Crop Yield Forecasts

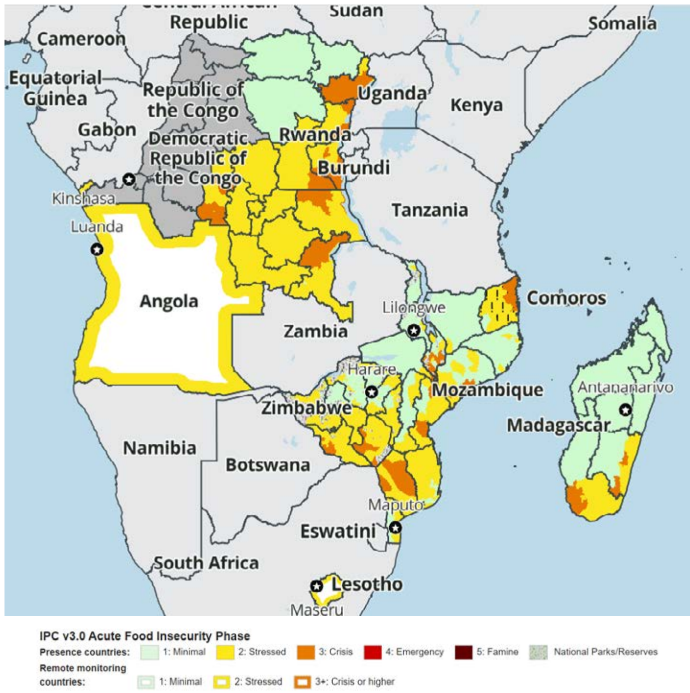
In **Kenya**, land preparation and planting are ongoing in marginal agricultural areas for the October to December short rains, while in the coastal marginal agricultural livelihood zones, the long rains maize crop harvest is also taking place. In **Uganda**, strong El Niño conditions are expected to support above-average rainfall which in turn support above-average crop production and improved livestock productivity. In **Ethiopia**, the meher harvest in September is expected to improve food supplies, while the deyr rainy season in October is expected to improve the availability of food and milk. Furthermore, although El Niño conditions are expected to result in improved harvests and livestock reproduction, they are also likely to result in displacement, crop losses, and livestock diseases[24]
.

23 *Author's construction based on data from WFP (2023).*

24 https://fews.net/east-africa/ethiopia

Southern Africa Food Security Update

Figure 4: East Africa countries Food Security Outlook, Jun-Sep 2023



Malawi: IPC Phase 2 and 3 outcomes are expected in the southern parts of the country as result of the aftermath of Tropical Cyclone Freddy, the lean season and high food prices, while most parts of the central and northern regions ae expected to experience IPC 1 outcomes.

Mozambique: IPC Phase 3 outcomes are being experienced in conflict affected areas and worst affected areas by shocks in 2023, while IPC 2 outcomes persist in most areas of southern and central Mozambique supported by post-flood production and humanitarian assistance.[25]

Zimbabwe: IPC Phase 1 outcomes are expected in the northern productive resettlement areas. However, IPC Phase 2 and 3 outcomes are being experienced in some parts of the country due to depleting stocks and high prices.

Prevalence of insufficient food consumption

As of 30th September 2023, 22.5 million people in four selected Southern African countries had insufficient food for consumption, which is an increase of 1.6% from the previous month indicating a deterioration of the region's food security situation. All the four selected countries have contributed to this upward trend during this period. The number of food insecure people in the region during the current month has increased compared to the same period last year (18.5 million) as well as against the 2021 values (21 million).

Table 11: Prevalence of insufficient food consumption in selected Southern African Countries (September 2023)[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	4.90	4.30	27.07	13.95	36.11	113.04
Mozambique	29.50	9.10	8.60	30.85	5.81	18.18	-9.90
Zambia	17.40	4.20	4.00	24.14	5.00	110.00	50.00
Zimbabwe	15.20	4.30	4.00	28.29	7.50	-17.31	-25.86

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

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

25 https://fews.net/southern-africa/mozambique

26 https://hungermap.wfp.org/

Commodity Prices

Key drivers of prices in the Southern Africa region [27]

	Seasonality Patterns	Most Southern African countries are experiencing seasonal declines in grain supplies putting upward pressure on prices
	Weather Shocks	The aftermath of the cyclone, drought shocks, and heavy flooding early in the planting season led to below average harvests from the just ended season resulting in higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, driven by forex shortages, high food inflation, and high fuel and transport costs, particularly in Malawi, are driving high food prices.

Malawi

Except cassava and rice prices in Mzuzu, the current prices recorded in July/August remains well above what was registered in the past 1-12 months. This is primarily due to the aftermath of the cyclone, drought shocks, and heavy flooding early in the planting season that led to below average harvests from the just ended season and as the country enters the lean season[28] in October.

Table 12: Changes in prices in Malawi [29]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Mzuzu, MWK/Kg**	1,162.50	-4.65	-17.44	-5.10	24.00
Maize	Lilongwe, MWK/Kg**	580.00	28.18	-7.20	93.33	136.73
Maize	Liwonde, MWK/Kg	771.50	15.97	36.91	16.72	126.91
Maize	Mzimba, MWK/Kg	565.50	14.07	43.62	14.88	117.50
Maize	Mzuzu, MWK/Kg	568.75	13.58	15.48	12.74	62.50
Maize	National Average, MWK/Kg	683.75	14.92	44.40	12.37	112.34
Maize	Nsanje, MWK/Kg	680.50	7.33	68.75	7.46	96.11
Rice	Lilongwe, MWK/Kg**	1,700.00	3.03	13.33	21.43	21.43
Rice	Mzuzu, MWK/Kg**	1,675.00	-2.76	-6.94	-6.94	54.02

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Mozambique

According to FEWSNET, Mozambique recorded above-average second season harvests of vegetables and some cereal crops from its post-flood production, and as a result prices of food commodities remain low or stable. All fertilizer types of prices generally remain lower as a result of the lean season.

27 FEWSNET, 2023. https://fews.net/southern-africa. Accessed 5th August 2023

28 https://fews.net/southern-africa/malawi

29 *Author's construction based on data from FAO (2023).*

Table 13: Changes in prices in Mozambique [30]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Angónia, Maize, Retail, MZN/KG#	20.00	0.00	28.45	74.98	
Maize (white)	Maputo, Retail, MZN/KG#	22.64	-0.96	-0.96	0.09	-14.34
Maize (white)	Massinga, Retail, MZN/KG#	26.35	-3.48	-4.60	13.70	-18.03
NPK 12-24-12	NPK 12-24-12 (MZN/50KG)***	3,116.00	-0.16	1.10	-2.66	
NPK 23-10-5 +3S + 1Zn	NPK 23-10-5 +3S + 1Zn (MZN/50KG)***	2,909.00	0.00	-1.52	-12.19	
Rice (imported)	Angónia, Retail, MZN/KG#	60.00	0.00	-14.29	-8.48	
Rice (imported)	Maputo, Retail, MZN/KG#	50.00	0.00	0.00	0.00	0.00
Rice (imported)	Massinga, Retail, MZN/KG#	61.67	1.83	2.78	2.31	4.23
Urea	Urea (MZN/50KG)***	3,351.00	0.00	0.21	-2.56	

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Zambia

The national average price of maize recorded in August in Zambia is above what was recorded in the past 1-12 months despite the fact that the harvest season just concluded. Compared to the past 1 and 3 months, maize prices went up by 3.28% and 7.35% respectively. All types of fertilizer prices remained stable over the past month and lower than the past 3-6 months.

Table 14: Changes in prices in Zambia [31]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	National Average, Retail, Kwacha/KG	5.43	3.28	7.35	11.07	49.09
NPK 10-20-10 + 6S	National, ZMW/50KG	808.67	0.00	-8.31	-11.26	
Urea	National, ZMW/50KG	820.33	0.00	-3.49	-12.36	

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Seasonal Monitor and Crop Yield Forecasts

Generally, strong El Niño conditions are expected to result in delayed onset of the main rainy season in the southern region. In **Malawi**, the lean season starts atypically from early October with expected below-normal rainfall in southern regions[32]

. In **Mozambique**, below-average rainfall in southern and central Mozambique, with average rainfall in the north [33]

. **Zimbabwe** is also forecasted to experience below average and irregular rains in the upcoming season[34]

30 *Author's construction based on data from WFP (2023).*

31 *Author's construction based on data from FAO (2023).*

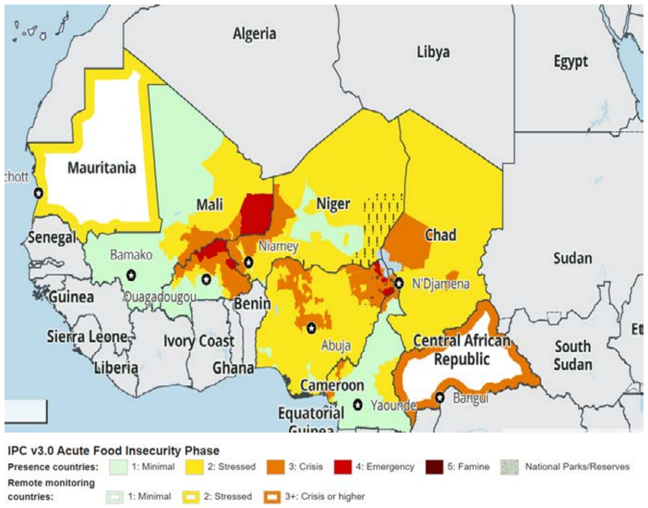
32 https://fews.net/southern-africa/malawi

33 https://fews.net/southern-africa/mozambique

34 https://fews.net/southern-africa/zimbabwe

West Africa Food Security Update

Figure 5: East Africa countries Food Security Outlook, Jun-Sep 2023



Burkina Faso: IPC Phase 4 outcomes persist on communities of Djibo, Arbinda, Kelbo, Sebba, Solhan, Gorom-Gorom and Markoye as a result of decreased food assistance due to logistic and insecurity challenges[35]
. In addition, there is high prevalence of Global Acute Malnutrition (GAM) in areas under blockade, particularly in the northern part of the country.

Mali: Increased food insecurity has been observed as IPC Phase 3 and 4 conditions persist in the Liptako Gourma and Ménaka regions due to the insecurity situation in the country as well as high food prices [36]. Seasonal improvements are however expected from October because of new harvests and humanitarian food assistance.

Niger: poor households face Crisis (IPC Phase 3) outcomes in in the Tillabéry, Diffa, Tahoua North and Maradi South-West regions as well as in Diffa and Maradi due to insecurity and high food prices, while IPC Phase 2 food insecurity are observed in the majority of agricultural and agropastoral livelihood zones.

Prevalence of insufficient food consumption

As of September 30, 2023, the number of people with insufficient food for consumption across the seven selected West African countries was 143.7 million, which is a 0.7 million drop from previous month. This is an improvement in the food security situation across the monitored countries during the month, with Ghana, Mali and Niger being the main contributors to this downward trend. Nonetheless, the number of food insecure people across the region is well above what was recorded the same period last year (111.7 million people) and two years ago (109.6 million people).

35 https://fews.net/west-africa/burkina-faso

36 https://reliefweb.int/report/mali/mali-key-message-update-severe-deterioration-livelihoods-linked-insecurity-leads-emergency-ipc-phase-4-menaka-july-2023

Table 15: Prevalence of insufficient food consumption in selected West African countries (August 2023)[37]

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	12.10	11.50	61.11	5.22	-0.82	5.22
Cote d'Ivoire	29.40	4.50	3.90	15.31	15.38	-8.16	-11.76
Ghana	29.80	5.40	5.80	18.12	-6.90	-19.40	-1.82
Mali	19.10	12.70	13.40	66.49	-5.22	-3.79	8.55
Niger	25.90	17.40	21.10	67.18	-17.54	1.16	58.18
Nigeria	202.80	88.50	85.60	43.64	3.39	60.91	41.15
Togo	7.90	1.90	1.90	24.05	0.00	-24.00	-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

Key drivers of the price movements in West Africa include[38]

	Insecurity & Armed Conflicts	Conflict and insecurity in parts of West Africa continue to disrupt agriculture, trade, and food assistance activities resulting in higher food prices.
	Macroeconomic Challenges	Poor macroeconomic conditions, driven by high fuel and transport costs, and weak local currencies, are pushing up food prices in some West African countries.
	Seasonal Dynamics	Harvesting in some West African countries are improving food supplies, thereby lowering or stabilizing prices in these countries.

Burkina Faso

Generally, the price of food commodities recorded in August show low to moderate increases, although significantly lower than a year ago in most markets (Table 16). Compared to July, maize prices were stable in Bousse and Dori but declined in Gourcy and Ouargaye, while millet price declined only in Gourcy. Armed conflicts continue to restrain the otherwise general declines in national average prices.

Table 16: Changes in prices in Burkina Faso [39]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Batié, Retail, XOF/KG	276.00	4.94	-5.15	2.60	4.55	-32.41	-25.92
Maize	Bousse, Retail, XOF/KG	244.00	0.00	-6.15	-5.06	-17.01	-7.04	-6.75
Maize	Dori, Retail, XOF/KG	353.00	0.00	8.95	4.44	6.65	-22.83	-17.48
Maize	Faramana, Retail, XOF/KG	155.00	6.90	1.97	-10.92	-26.54	-4.81	-6.40
Maize	Gourcy, Retail, XOF/KG	252.00	-0.40	-0.79	-3.45	-20.50	-9.42	0.09
Maize	Ouagadougo (Sankaryare), Retail, XOF/KG	260.00	7.00	5.69	4.84	-9.72	-10.63	6.63
Maize	Ouargaye, Retail, XOF/KG	233.00	-0.43	7.87	10.95	-1.27	-32.13	-29.33
Maize	Titao, Retail, XOF/KG	364.00	4.90	1.96	-9.68	-21.04	-43.75	-33.58
Millet	Batié, Retail, XOF/KG	420.00	3.19	-0.94	-0.24	30.43	-22.96	-31.65
Millet	Bousse, Retail, XOF/KG	285.00	3.26	-8.95	-13.37	-19.49	-25.11	3.94
Millet	Dori, Retail, XOF/KG	417.00	7.20	7.20	1.71	-5.87	-18.55	-15.39
Millet	Faramana, Retail, XOF/KG	200.00	5.26	-8.26	-16.67	-36.31	-17.85	-5.59
Millet	Gourcy, Retail, XOF/KG	254.00	-0.39	-3.05	-6.62	-37.90	-17.97	8.81
Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	347.00	5.47	8.44	3.89	-25.85	-15.49	4.10
Millet	Ouargaye, Retail, XOF/KG	255.00	4.08	8.97	4.94	-35.28	-7.72	-1.58
Millet	Titao, Retail, XOF/KG	414.00	4.81	1.47	-13.57	-16.53	-57.13	-45.18

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

37 https://hungermap.wfp.org/

38 https://hungermap.wfp.org/

39 Author's construction based on data from WFP (2023).

Cote d'Ivoire

The prices of maize and rice tracked in Cote d'Ivoire remained mostly stable, declined, or experienced low to moderate increases compared to the past 1-12 months. Compared to the past one month, prices of maize declined in Korhogo but remained stable in Man, while rice prices remained unchanged in all monitored markets. The current prices were also lower than a year ago except in Man where the price of local rice was higher by 10%. The price of urea had picked up by 2.11% above the previous months.

Table 17: Changes in prices in Cote d'Ivoire[40]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Urea	National Av, USD/50KG**	40.73	2.11	0.42	-26.17			
Maize (white)	Korhogo, Retail, XOF/KG	200.89	-10.72	-12.74	-17.95	-40.48	5.69	
Maize (white)	Man, Retail, XOF/KG	275.00	0.00	-8.33	4.76	-18.52	-18.01	13.41
Rice (denikassia imported)	Korhogo, Retail, XOF/KG	475.00	0.00	5.56	-1.52	-5.00	-27.54	-26.70
Rice (denikassia imported)	Man, Retail, XOF/KG	425.00	0.00	-5.56	-5.56	-8.11	0.95	-0.67
Rice (Local)	Korhogo, Retail, XOF/KG	475.00	0.00	4.35	4.36	0.00	-22.33	-19.92
Rice (Local)	Man, Retail, XOF/KG	550.00	0.00	0.00	10.00	10.00	-12.17	-15.28

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Ghana

The prices of food commodities monitored have generally declined in August compared to July despite being above the previous 3-12 months in most monitored markets. The price of cassava dough had seen the most significant drops by 19.85%, while plantain, rice of all types, sorghum, and soya beans have all experienced low to moderate declines due to new harvests from the major season. Fertilizer prices have begun picking up as the minor season starts.

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	National Average, Retail, GHS/KG	3.79	0.04	-10.75	32.61	66.13
Cassava Dough	National Average, Retail, GHS/KG	5.97	-19.85	12.28	-10.22	25.12
Maize (white)	National Average, Retail, GHS/KG	7.19	0.68	5.97	20.88	58.72
Maize (Yellow)	National Average, Retail, GHS/KG	7.48	2.12	5.90	22.98	46.12
Millet	National Average, Retail, GHS/KG	10.78	0.34	3.60	6.97	42.89
NPK 20-10-10	National Average, USD/50KG	40.34	1.97	0.07	22.32	-4.09
NPK 23-10-5	National Average, USD/50KG	40.34	1.38	0.07	8.09	-7.07
Plantain (Apem)	National Average, Retail, GHS/KG	9.20	-6.47	25.68	70.24	10.63
Plantain (Apentu)	National Average, Retail, GHS/KG	9.91	-7.05	30.95	85.75	25.77
Rice - Imported (non-perfumed)	National Average, Retail, GHS/KG	12.54	-1.45	4.14	5.19	62.12
Rice - Imported (perfumed)	National Average, Retail, GHS/KG	17.90	-2.63	0.00	-1.26	62.74
Rice Local (perfumed)	National Average, Retail, GHS/KG	13.97	-1.65	-0.38	5.46	63.23
Rice Local (non-perfumed)	National Average, Retail, GHS/KG	12.12	-0.49	4.05	11.59	79.91
Sorghum	National Average, Retail, GHS/KG	9.25	-1.90	2.07	8.39	37.73
Soya Bean	National Average, Retail, GHS/KG	9.97	-3.92	5.89	10.92	22.96
Urea	National Average, USD/50KG	38.49	0.03	-3.63	-13.95	-19.49
Yam (Puna)	National Average, Retail, GHS/KG	9.66	3.51	22.25	44.60	51.98
Yam (White)	National Average, Retail, GHS/KG	5.90	-7.87	0.53	27.62	20.99

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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

Mali

Generally, the prices of food commodities in the monitored markets of Mali remain unchanged or experienced significant declined compared to the past 1-12 months (Table 19) due to seasonal improvements of green harvests of corn and legumes as well as humanitarian food assistance[42]. However, due to disruptions to trade resulting from insecurity, the prices of millet, rice, and sorghum in markets such as Timbuktu, Gao, and Kayes, remain elevated above previous months.

Table 19: Changes in prices in Mali[43]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Millet	Bamako, Wholesale, XOF/100 KG	25,000.00	8.70	-5.66	-3.85	-34.21
Millet	Gao, Wholesale, XOF/100 KG	35,000.00	7.69	-22.22	16.67	-20.45
Millet	Kayes, Wholesale, XOF/100 KG	25,000.00	-7.41	-16.67	-16.67	-37.50
Millet	Mopti, Wholesale, XOF/100 KG	26,000.00	0.00	-7.14	-1.89	-30.67
Millet	Ségou, Wholesale, XOF/100 KG	19,000.00	0.00	-24.00	-20.83	-54.76
Millet	Sikasso, Wholesale, XOF/100 KG	25,000.00	0.00	-12.28	-9.09	-37.50
Millet	Tombouctou, Wholesale, XOF/100 KG	37,500.00	7.14	7.14	25.00	-16.67
Rice	Bamako, Wholesale, XOF/100 KG	46,000.00	0.00	0.00	0.00	2.22
Rice	Gao, Wholesale, XOF/100 KG	47,500.00	0.00	0.00	5.56	10.47
Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	4.00	4.00	4.00	10.64
Rice	Mopti, Wholesale, XOF/100 KG	45,000.00	0.00	0.00	0.00	0.00
Rice	Ségou, Wholesale, XOF/100 KG	47,500.00	0.00	0.00	5.56	13.10
Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	0.00	-2.17	-10.00	0.00
Rice	Tombouctou, Wholesale, XOF/100 KG	50,000.00	8.70	0.00	11.11	11.11
Rice (imported)	Bamako,Wholesale, XOF/100 KG	43,000.00	0.00	0.00	0.00	16.22
Rice (imported)	Gao, Wholesale, XOF/100 KG	47,500.00	5.56	5.56	13.10	11.76
Rice (imported)	Kayes, Wholesale, XOF/100 KG	44,000.00	15.79	-7.37	8.64	22.22
Rice (imported)	Mopti, Wholesale, XOF/100 KG	44,000.00	0.00	0.00	10.00	12.82
Rice (imported)	Sikasso, Wholesale, XOF/100 KG	44,000.00	-7.37	0.00	0.00	12.82
Sorghum	Bamako, Wholesale, XOF/100 KG	25,000.00	13.64	8.70	0.00	-30.56
Sorghum	Gao, Wholesale, XOF/100 KG	35,000.00	0.00	0.00	16.67	-20.45
Sorghum	Kayes, Wholesale, XOF/100 KG	26,000.00	4.00	13.04	4.00	-29.73
Sorghum	Mopti, Wholesale, XOF/100 KG	24,000.00	0.00	-7.69	9.09	-27.27
Sorghum	Ségou, Wholesale, XOF/100 KG	20,000.00	0.00	-20.00	-16.67	-50.00
Sorghum	Sikasso, Wholesale, XOF/100 KG	22,000.00	10.00	-2.22	0.00	-24.14
Sorghum	Tombouctou, Wholesale, XOF/100 KG	37,500.00	13.64	13.64	25.00	-25.00

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

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Niger

Overall, the prices of the three monitored commodities, maize, millet, and sorghum remained highly elevated above the past 1-12 month's level (Table 20). For instance, compared to the previous month, maize prices were higher by 8.75-23.64%, while millet is up by 3.52-19.72%, and sorghum by 3.65-27.05% in the selected markets. This is largely because of insecurity and sanctions imposed by the Economic Community of West African States (ECOWAS) on Niger following the coup d'état, which disrupted the trade from neighbouring countries. To ameliorate the further impacts of higher food prices, the government of Niger reduced import taxes on rice, edible oil, wheat flour and sugar by 25%.

40 Author's construction based on data from WFP (2023).

41 Author's construction based on data from the Ghana Ministry of Food and Agriculture (2023).

42 https://fews.net/west-africa/mali

43 Author's construction based on data from WFP (2023)

Table 20: Changes in prices in Niger [44]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Abalak, Retail, XOF/KG	408.00	23.64	22.52	35.10	9.38	-26.59	-12.17
Maize	Bonkaney, Retail, XOF/KG	355.00	17.55	52.36	55.70	21.99	-33.66	-18.94
Maize	Goure, Retail, XOF/KG	435.00	8.75	24.64	32.62	17.89	-29.18	-10.35
Maize	Katako, Retail, XOF/KG	373.00	20.32	58.72	51.01	26.87	-31.29	-26.08
Millet	Abalak, Retail, XOF/KG	406.00	19.41	15.67	19.06	2.78	-26.80	-11.10
Millet	Bonkaney, Retail, XOF/KG	353.00	3.52	22.57	20.07	-7.59	-13.94	-12.00
Millet	Goure, Retail, XOF/KG	431.00	19.72	23.50	40.39	14.32	-29.48	-14.07
Millet	Katako, Retail, XOF/KG	362.00	8.71	24.83	23.97	-7.18	-18.68	-10.39
Sorghum	Abalak, Retail, XOF/KG	418.00	27.05	30.22	54.24	30.63	-27.25	-16.77
Sorghum	Bonkaney, Retail, XOF/KG	360.00	8.76	21.21	28.57	10.43	-23.23	-20.28
Sorghum	Goure, Retail, XOF/KG	341.00	3.65	4.28	25.37	-5.80	-21.58	3.13
Sorghum	Katako, Retail, XOF/KG	366.00	11.93	22.00	32.13	13.31	-26.45	-16.67
Urea	National Average, USD/50KG	33.73	-4.07					

*Note: Last price is for August 2023, *September, **July, ***June, ****May, and #Lagged more than 3 months*

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

Nigeria

Overall, the prices of monitored commodities remain largely high in Nigeria compared to the past 1-12 months (Table 21) due to several factors including conflict, prolonged dry spells, below-average harvests, and macroeconomic crisis[45]. Compared to the previous month, the prices of maize, millet, and sorghum have had significant increases of between 15% and 41% with only rice having experienced low to moderate increases between 1.8% and 4.89% and a decline in Giwa and Ibadan by 1.13% and 1.64% respectively. The prices of all types of fertilizers have also climbed up from the previous month, although still significantly lower than 3-12 months ago.

Table 21: Changes in prices in Nigeria [46]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Giwa, NGN/KG**	371.33	20.27	60.75	81.14	101.81
Maize (white)	Ibadan, NGN/KG**	400.00	20.66	49.03	46.41	58.73
Maize (white)	Kano, NGN/KG**	404.13	37.36	63.35	76.78	88.25
Maize (white)	Kaura Namoda, NGN/KG**	399.65	34.26	66.77	71.44	84.41
Maize (white)	Lagos, NGN/KG**	407.25	41.04	53.56	65.01	60.84
Maize (white)	Maiduguri, NGN/KG**	390.00	20.00	59.84	82.24	78.90
Millet	Giwa, NGN/KG**	423.33	23.60	51.19	84.86	61.58
Millet	Ibadan, NGN/KG**	414.00	21.85	34.59	41.20	56.82
Millet	Kano, NGN/KG**	366.85	18.47	35.00	43.70	33.81
Millet	Kaura Namoda, NGN/KG**	404.50	31.02	62.37	53.85	63.66
Millet	Lagos, NGN/KG**	406.50	29.36	30.29	43.13	48.57
Millet	Maiduguri, NGN/KG**	365.00	21.67	47.18	55.98	41.47
NPK 15-15-15	National, USD/50KG	35.51	2.96	-38.14	-37.98	-41.77
NPK 20-10-10	National, USD/50KG	32.45	4.37	-35.92	-38.12	-41.96
Rice (imported)	Giwa, NGN/KG**	726.67	-1.13	-4.89	-6.36	29.76
Rice (imported)	Ibadan, NGN/KG**	673.50	3.94	-0.07	3.30	13.00
Rice (imported)	Kaura Namoda, NGN/KG**	707.00	3.44	4.33	6.88	16.77

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Togo

The prices of food commodities in Togo remained mostly stable or experienced low increases (0-5%) in August compared to July (Table 22). For instance, maize prices were only up in Anie and Lome, while rice prices were only up in Anie and Kara, and sorghum prices were up in Cinkasse and Korbongou. The current price of sorghum remains higher than they were 3-12 months ago, whereas the current prices of cassava, maize, and rice show mixed trends compared to the past 3-12 months.

Table 22: Changes in prices in Togo[47]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava (gari)	Amegnran, XOF/Kg	300.00	3.45	9.09	1.69	0.00
Cassava (gari)	Anie, XOF/Kg	315.00	2.94	5.00	5.00	5.00
Cassava (gari)	Cinkassé, XOF/Kg	420.00	0.00	-2.33	-2.33	-4.55
Cassava (gari)	Kara, XOF/Kg	440.00	1.15	2.33	2.33	15.79
Cassava (gari)	Korbongou, XOF/Kg	430.00	1.18	1.18	0.00	0.00
Cassava (gari)	Lomé, XOF/Kg	390.00	4.00	-2.50	-7.14	-2.50
Maize (white)	Amegnran, XOF/Kg	250.00	0.00	0.00	-2.72	-9.09
Maize (white)	Anie, XOF/Kg	250.00	0.40	0.00	13.64	6.38
Maize (white)	Cinkassé, XOF/Kg	265.00	0.00	3.92	6.00	1.92
Maize (white)	Kara, XOF/Kg	290.00	-0.34	7.41	16.00	9.43
Maize (white)	Korbongou, XOF/Kg	260.00	0.00	0.00	5.26	0.00
Maize (white)	Lomé, XOF/Kg	290.00	1.40	7.41	9.43	0.00
Rice (imported)	Amegnran, XOF/Kg	570.00	0.00	3.64	1.79	3.64
Rice (imported)	Anie, XOF/Kg	490.00	2.08	6.52	6.52	6.52
Rice (imported)	Cinkassé, XOF/Kg	465.00	0.00	0.00	1.09	0.00
Rice (imported)	Kara, XOF/Kg	490.00	1.03	6.52	6.52	6.52
Rice (imported)	Korbongou, XOF/Kg	540.00	0.00	8.00	8.00	11.34
Rice (imported)	Lomé, XOF/Kg	490.00	0.00	1.03	6.52	6.52
Sorghum	Anie, XOF/Kg	350.00	0.00	16.67	32.08	18.64
Sorghum	Cinkassé, XOF/Kg	315.00	5.00	5.00	23.53	8.62
Sorghum	Kara, XOF/Kg	390.00	0.00	30.00	52.94	25.81
Sorghum	Korbongou, XOF/Kg	350.00	12.90	16.67	37.25	12.90
Sorghum	Lomé, XOF/Kg	475.00	0.00	31.94	41.79	48.44

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Seasonal Monitor and Crop Yield Forecasts

In **Burkina Faso**, the distribution of rains was satisfactory between mid-July and mid-September resulting in green maize and early millet as well as cowpea harvests. Despite these, due to underutilization of inputs and reduced access to fields as a result to conflicts, the expected harvests will be lower than the average in the country[48]. In **Mali**, below-average cereal production, particularly in insecure areas, are expected given the poor distribution of rains and population displacements and poor access to fertilizers[49] In **Niger**, millet and cowpea crops are maturing earlier than average due to favourable rainfalls. Nonetheless, less access to fields due to insecurity, there would be a reduction in agricultural production of cereals and cash crops compared to last year[50].

44 Author's construction based on data from WFP (2023)

45 https://fews.net/west-africa/nigeria

46 Author's construction based on data from FAO (2023)

47 Author's construction based on data from FAO (2022)

48 https://fews.net/west-africa/burkina-faso

49 https://fews.net/west-africa/mali

50 https://fews.net/west-africa/niger

Food Trade Updates

Continental

The month of September 2023 has seen some major events and activities that have significantly influenced food trade across the continent. These occurrences have had a significant impact on the trade of foodstuff.

- The African Export-Import Bank (Afreximbank), is to increase its intra-African trade financing to $40 billion as it continues to support the Africa Continental Free Trade Area (AfCFTA) initiative, as it partners through the Pan-African Payments and Settlements System (PAPSS), and the transit guarantee scheme[51] .
- Africa Finance Corporation announced the successful signing of a $300 million loan facility agreement with the Export-Import Bank of China (CEXIM). This agreement, signed on the sidelines of the Asian Infrastructure Investment Bank (AIIB) Annual meetings in Egypt, is poised to drive increased trade finance and investment across the African continent, fostering economic growth and development[52] .

East Africa

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

- The East African Community partner states have through their standards regulators agreed on 11 measures aimed at improving the standard of food products on the market. The move is also aimed at ensuring the protection of local consumers against food-borne diseases and a smooth flow of trade within the region[53] .
- Foreign currencies difficulties and lack of affordable credit in the midst of rising interest rates are constraining trade in the East African Community. In addition, persistent cross-border restrictions and high trading costs are hurting intra-EAC trade .

Figure 6 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 6: East Africa Cross border trade updates August 2023

KENYA

- The Kenyan government has announced that it will remove deposit fees of $3,000 (about Shs1m) per container on containers carrying Ugandan goods at Mombasa port.
- The government of Kenya has placed an import restriction on maize and wheat.
- Kenya has officially joined the Pan African Payments and Settlement System (PAPSS) enabling Kenyan companies to engage in trade with their counterparts in other African member states using local currencies, a critical step in the implementation of the African Continental Free Trade Area (AfCFTA).

51 https://www.thecable.ng/afreximbank-to-increase-intra-african-trade-financing-to-40bn-by-2026

52 https://www.logupdateafrica.com/trade/afc-secures-300-mn-loan-from-cexim-to-boost-trade-finance-in-africa-1349896?infinitescroll=1

53 https://www.independent.co.ug/eac-standards-national-agencies-agree-on-new-measures-for-smooth-trade/

Southern Africa

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

Figure 7: Southern Africa Food Trade updates for August 2023

ZAMBIA

- The European Union 11th Development Programme to support the upgrade of the Tunduma border post to facilitate trade flow along the Zambia – Tanzania corridor to the tune of Euros 2.638 million project. The upgrades will include installation, configuration, and commissioning of ICT equipment such as desktops, laptops, printers, and smart gates among others.

ZIMBABWE

- Zimbabwe government's relaxation of basic commodity imports has resulted in 16% net imports (US$1,24 billion) within the last seven months compared to the same period last year.

West Africa

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

- The 90th Session of the Economic Community of West African States (ECOWAS) Council of Ministers endorsed a regional strategy to accelerate the implementation of the AfCFTA in the ECOWAS region and leverage on opportunities for growth and prosperity in the region.
- ECOWAS to begin the construction of the 1028-kilometer Abidjan-Lagos highway project in January 2024. The project which cuts across and connects major cities and traversing Nigeria, Ghana, Togo, Benin Republic, and Cote D'Ivoire, has a significant economic potential.

Figure 8: West Africa Cross Border Trade Updates August 2023

NIGER

- Sanctions by the Economic Community of West African States (ECOWAS) including the banning of trade with Niger following the coup are increasing food prices and making people's lives worse.

NIGERIA

- The Nigerian government to allow Nigerian importers to legally import their goods from the ports in Cotonou, Benin Republic through setting up a clearing point for Nigeria-bound goods. This follows the ban on the importation of rice, poultry, and other products to curb smuggling along the borders.

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

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