FOOD SECURITY MONITOR

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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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. The opinions expressed in this report are those of the authors and do not reflect the official policy or position of AGRA, its employees, partners, or its affiliates in any way. While AGRA has made every effort to ensure the accuracy and completeness of the information entered in this report, we assume no responsibility for any errors, inaccuracies, omissions, or inconsistencies included herein. The mention of specific companies, manufacturers or their products, whether or not these have been patented, does not imply endorsement or recommendation or approval by AGRA, its employees, partners or their affiliates in preference to others of a similar nature that are not mentioned. The descriptions, charts and maps used do not imply the expression of any opinion whatsoever on the part of AGRA concerning the development, legal or constitutional status of any country.

Contents

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 August Food Security Monitor are summarised below:

Global Market Update

The Black Sea Grain Initiative remains suspended. Nonetheless, the FAO Food Price Index (FFPI) declined by 2.1% in August driven by reductions in the price indices of dairy products, vegetable oils, meat, and cereals.

Regional Food Security Updates

In East Africa, food and fuel prices remain high, and continue to limit the access to food among low-income households.

In Southern Africa, the main harvests have ended across most parts of the region with some countries approaching the lean season, which is characterized by deteriorating food reserves.

In West Africa, persistently high staple prices continue to limit household food access during and after the harvests.

Food Trade

In East Africa, the move by Tanzania to stop issuing export permits for food products headed to Uganda and Kenya has led to a significant drop in market prices for farmers in the country.[1]

In Southern Africa, Zambia and Namibia are introducing a 24-hour border operation at the Walvis Bay Port, which will boost trade between the two countries and the region.

In West Africa, the decision by West African nations to shut down their borders with Niger in response to the coup is harming local businesses in northern Nigeria.[2]

Commodity Prices

In East Africa**,** except in Ethiopia where food commodities prices remain high, Uganda and Kenya show declining prices, while the remaining countries depict mixed trends.

In Southern Africa, mixed trends persist, with Mozambique and Zambia registering generally lower prices as Malawi experiences higher than usual prices compared to similar periods in previous years.

In West Africa, mixed trends are mostly observed, with Mali and Ghana experiencing lower prices, Nigeria having higher than normal prices, while the remaining countries show mixed trends.

[1] https://www.independent.co.ug/private-sector-tanzanias-agro-trade-policies-distabilising-regional-trade/
[2] https://apnews.com/article/niger-coup-nigeria-border-sanctions-ecowas-86800c1ff1f443294c0a19cafdcdf9ed

Introduction

The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade, and food and nutrition security. The discussions presented here focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Rwanda, Tanzania, and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe), and West Africa (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Dashboard

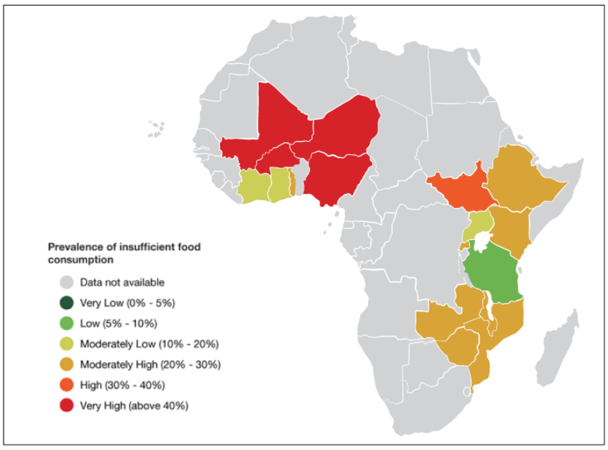
The Food Security Dashboard (Table 1 and Figure 1) offers a concise overview of fluctuations in the number of people experiencing Insufficient Food Consumption (IFC)[3], snapshots of hunger hotspots, and average changes in food prices[4] over the past two years. ***Figure 1*** displays the prevalence of IFC in July 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 (58.1%), Mali (70.2%), and Niger (94.2%). Meanwhile, the number of people with IFC decreased in Burkina Faso, Cote d'Ivoire, Ghana, South Sudan, Tanzania, Togo, Uganda, and Zimbabwe compared to last year. Additionally, the average national maize prices over the last six months have been high in most monitored countries except in Burkina Faso, Kenya, Mali, and Uganda. The situation is much better compared to a year ago, with the average national maize prices getting lower in 7 out of 15 countries.

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 6 months		Commodity Price Changes in the last 1 year	
Burkina Faso	-7.26	↓	1.77	↑	-3.09	↓	-14.88	↓
Cote d'Ivoire	-22.00	↓	-13.33	↓	17.07	↑	-15.90	↓
Ethiopia	13.17	↑	-6.83	↓	19.36	↑	40.71	↑
Ghana	-17.14	↓	5.45	↑	20.88	↑	58.72	↑
Kenya	35.11	↑	62.82	↑	-11.10	↓	-28.15	↓
Malawi	13.16	↑	86.96	↑	20.14	↑	91.94	↑
Mali*	8.06	↑	25.23	↑	-7.83	↓	-32.87	↓
Mozambique	0.00	●	-20.37	↓	29.59	↑	-16.18	↓
Niger	21.26	↑	70.16	↑	22.31	↑	-1.13	↓
Nigeria	48.35	↑	38.06	↑	70.50	↑	78.82	↑
Rwanda	21.43	↑	36.00	↑	13.03	↑	16.00	↑
South Sudan	-49.28	↓	-46.97	↓	38.82	↑	131.76	↑
Tanzania	-15.69	↓	-15.69	↓	10.46	↑	60.62	↑
Togo	-24.00	↓	-13.64	↓	7.03	↑	-0.93	↓
Uganda	-46.31	↓	-46.31	↓	-1.53	↓	11.08	↑
Zambia	66.67	↑	81.82	↑	12.53	↑	52.46	↑
Zimbabwe	-28.57	↓	-31.03	↓				

Key: ● *No Change* ↑ = *increase* ↓ = *decrease*

Figure 1: Hunger Hotspots Snapshot, June 2023



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

[3] **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).

[4] 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.

Global Market Update

Global Food Prices

The FAO Food Price Index (FFPI) declined by 2.1% in August (Figure 2) driven by reductions in the price indices of dairy products (4%), vegetable oils (3.1%), meat (3%), and cereals (0.7%). The sugar price index, however, increased moderately by 1.3%.[5] These trends are reflective of higher seasonal availabilities from ongoing harvests in many major exporting countries. Similarly, the International Grain Council's (IGC's) Grain and Oilseeds Index (GOI) showed stability between August and early September, but it declined 11.88% compared to a year ago (Table 2). Meanwhile, the IGC sub-indices for wheat, maize, rice, soyabeans, and barley, increased in comparison to one month ago, and were mostly lower than a year ago, save for the rice sub-index.

Figure 2: FAO Food Price Index (FFPI)[6]

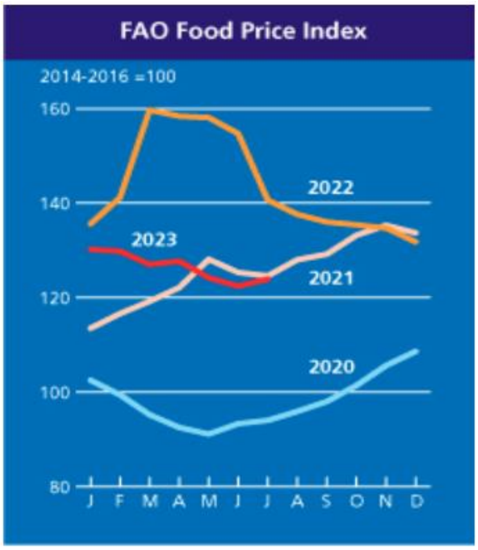


Table 2: IGC GOI Commodity Price Indices[7]

Jan 2000 = 100	07-Sep	*% Change 1M*	*% Change 1 Yr*
GOI	268.34	*0.00*	*-11.88*
Wheat	229.92	*-4.56*	*-21.02*
Maize	242.63	*8.79*	*-20.63*
Rice	249.13	*2.71*	*41.69*
Soyabeans	271.96	*0.00*	*-11.04*
Barley	230.47	*0.00*	*-24.85*

Global Fertilizer Prices

The prices of all fertilizer types declined, with DAP, MAP, Potash, and urea dropping by 4.7%, 4.8%, 10.5%, and 1.6%, respectively between August 4 and September 1 (Table 3). Compared to a year ago, the prices have declined by 23.3%, 28%, 40.9%, and 30%, respectively. The lower fertilizer prices are largely attributed to low off-season demand.

Table 3: Global Fertilizer Prices[8]

Date Range	DAP	MAP	POTASH	UREA
Aug 29-Sep 2 2022	952	1022	877	804
Sep 26-30 2022	947	1005	874	812
Oct 24-28 2022	930	986	862	827
Nov 21-25 2022	927	972	841	802
Dec 19-Dec 23 2022	890	909	790	757
Jan 16-Jan 20 2023	859	865	721	712
Feb 13-Feb 17 2023	838	857	692	686
Mar 13-Mar 17 2023	825	821	655	638

[5] FAO, 2023. Accessed at https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[6] FAO, 2023. Accessed at https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[7] Author's construction based on data from IGC GOI, 2023. Accessed at https://www.igc.int/en/markets/marketinfo-goi.aspx
[8] https://www.dtnpf.com/agriculture/web/ag/crops/article/2023/09/06/fertilizer-prices-continue-lower

Apr 10-14 2023	821	809	642	625
May 8-12 2023	828	826	627	664
June 5-9 2023	822	832	618	622
July 3-7 2023	824	827	619	615
July 31-Aug 4 2023	766	773	579	572
Aug 28-Sep 1 2023	730	736	518	563
% Change Aug. 4 – Sept 1, 2023	-4.7	-4.8	-10.5	-1.6
% Change Sept 2, 2022 – Sept 1, 2023	-23.3	-28.0	-40.9	-30.0

Source: DTN

Food Insecurity Updates

East Africa Food Security Update

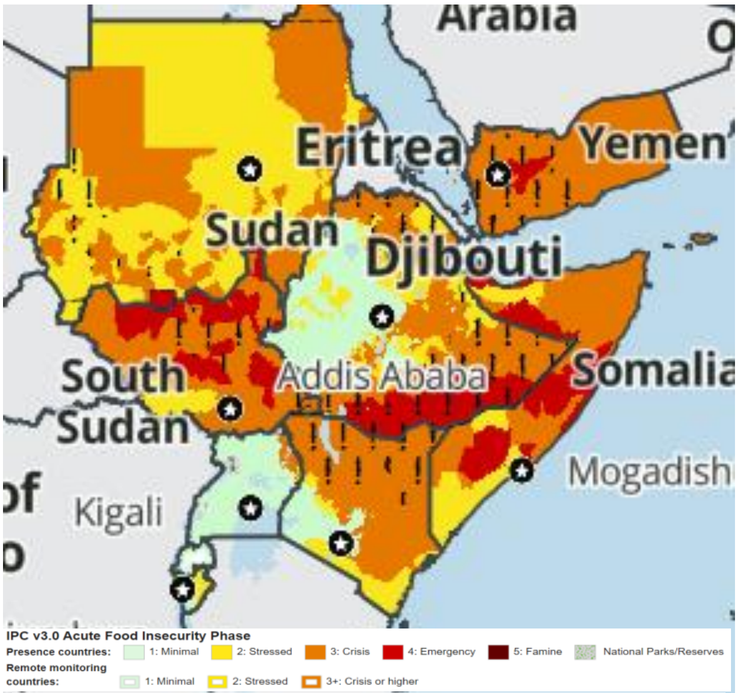


Figure 3: East Africa countries Food Security Outlook, Jun-Sep 2023

Kenya: despite many households recovering from the historic drought and high food prices due to harvests from the long rains, IPC Phase 2 and 3 outcomes persist in many parts of the country.

Rwanda: average Season B harvests and improved cross-border trade with Uganda and Tanzania are stabilizing market supplies, and improving the food security situation in the country.

South Sudan: widespread IPC 3 and 4 food security situations have been observed in South Sudan due to seasonal decline in food supplies, high staple food prices, macroeconomic conditions, climatic shocks, and conflict and insecurity, which is affecting agriculture and humanitarian access.

Uganda: The impact of average to below-average food and livestock production over the last three years due to climate related shocks/hazards, and endemic pests/diseases, coupled with a fragile security situation are causing widespread food insecurity in Karamoja.

Tanzania: Persistent high food prices, dry spells and crop pests, are driving food insecurity in mainland Tanzania

Prevalence of insufficient food consumption

As of August 31, 2023, 57.2 million people across six selected East African countries did not have enough food for consumption. The same number was recorded in the previous month suggesting that the food security situation across the monitored countries did not change. However, there were variations at country level, with Kenya and Rwanda recording IFC increases while South Sudan, Tanzania and Uganda had decreases, and Ethiopia remained stable. The number of food insecure people in the region was, however, lower in August 2023 than the same time last year (59.6million) and higher than in 2021 (61.8 million). *Table 4* below provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries in August 2023.

Table 4: Prevalence of insufficient food consumption across selected East African countries (August 2023)[9]

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	109.20	23.20	23.20	21.25	0.00	13.17	-6.83
Kenya	51.40	12.10	14.40	24.71	4.96	35.11	62.82
Rwanda	12.30	3.10	3.60	27.64	9.68	21.43	36.00
South Sudan	11.00	3.90	4.80	31.82	-10.26	-49.28	-46.97
Tanzania	56.30	5.00	5.00	7.64	-14.00	-15.69	-15.69
Uganda	42.70	9.90	16.10	18.74	-19.19	-46.31	-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[10]

	**Conflicts**	Conflicts and insecurity persist in some East African countries driving strong demand from an influx of refugees and returnees resulting in higher food commodity prices.
	Seasonal Dynamics	Seasonal harvests are increasing supplies in most markets and causing declines in prices.
	**Macroeconomic Shocks**	Poor macroeconomic conditions, driven by high food inflation, and high fuel and transport costs in some East African countries are impacting food prices.

Ethiopia

Due to the unavailability of data on Ethiopia, the current price trend analysis is limited to May 2023, which shows that prices remain generally high compared to the past 1-12 months and are expected to remain so until September when the *meher* harvest begins.[11]

[9] https://hungermap.wfp.org/
[10] https://fews.net/east-africa .
[11] https://fews.net/east-africa/ethiopia

Table 5: Changes in prices in Ethiopia[12]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Beans (fava)	Addis Ababa, Retail, ETB/KG***	83.00	3.75	13.70	15.28	26.91
Beans (fava)	Bahirdar, Retail, ETB/KG***	63.25	0.40	3.43	-9.32	24.90
Beans (fava)	Diredawa, Retail, ETB/KG***	82.50	1.85	3.13	25.48	
Beans (fava)	Shashemene, Retail, ETB/KG***	57.25	-4.58	8.53	-3.78	17.90
Maize (white)	Addis Ababa, Retail, ETB/KG***	49.60	2.06	24.00	29.84	59.79
Maize (white)	Bahirdar, Retail, ETB/KG***	29.48	3.80	8.58	11.58	31.37
Maize (white)	Diredawa, Retail, ETB/KG***	54.25	-1.36	11.28	21.91	
Maize (white)	Shashemene, Retail, ETB/KG***	37.25	-1.97	9.72	14.09	30.98
Sorghum (red)	Addis Ababa, Retail, ETB/KG***	59.90	1.53	29.93	44.86	47.97
Sorghum (red)	Diredawa, Retail, ETB/KG***	57.50	4.55	15.00	17.95	
Sorghum (red)	Shashemene, Retail, ETB/KG***	40.00	0.00	14.29	12.99	29.70
Sorghum (white)	Addis Ababa, Retail, ETB/KG***	64.50	-0.77	29.39	46.42	53.72
Sorghum (white)	Diredawa, Retail, ETB/KG***	52.75	-4.09	6.57	14.05	
Sorghum (white)	Shashemene, Retail, ETB/KG***	65.00	0.00	20.64	33.20	82.17
Teff (mixed)	Addis Ababa, Retail, ETB/KG***	83.20	0.73	43.08	58.63	65.47
Teff (mixed)	Bahirdar, Retail, ETB/KG***	65.65	0.08	19.36	44.99	56.16
Teff (mixed)	Diredawa, Retail, ETB/KG***	88.50	6.63	47.75	52.59	
Teff (mixed)	Shashemene, Retail, ETB/KG***	79.55	1.21	40.80	53.72	75.68
Wheat	Addis Ababa, Retail, ETB/KG***	68.90	0.15	1.32	25.05	53.25
Wheat	Bahirdar, Retail, ETB/KG***	61.15	1.92	13.24	22.06	36.74
Wheat	Diredawa, Retail, ETB/KG***	73.25	4.64	46.50	44.33	
Wheat	Shashemene, Retail, ETB/KG***	60.50	-3.97	18.05	26.57	49.01

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

Kenya

Overall, the prices of food commodities monitored showed downward trends in August against previous periods (Table 6). Compared to July, the prices of most commodities declined in August except for njahi (dolichos lablab), red and white Irish potatoes, and red sorghum. The Government of Kenya is expected to set minimum price as harvest season begins[13] with prices expected to further decrease in the coming months against the expected bumper harvests due to increase use of subsidized fertilizer, and an increase in area under cultivation by 8%.[14]

[12] Author's construction based on data from FAO (2023)
[13] https://ratin.net/site/news_article/13463
[14] https://ratin.net/site/news_article/13360; https://fews.net/east-africa/kenya

Table 6: Changes in prices in Kenya[15]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Arrow Root	National Average Wholesale, KES/90KG*	6,600.00	-30.30	-30.86	-21.52	-18.15
Beans (Yellow-Green)	National Average Wholesale, KES/90KG*	14,507.10	-3.68	-10.29	-0.63	32.55
Beans Red Haricot (Wairimu)	National Average Wholesale, KES/90KG*	11,074.50	-12.27	-20.46	10.68	20.10
Dolichos lablab (Njahi)	National Average Wholesale, KES/90KG*	15,250.50	0.88	-2.61	7.63	40.09
Dry Maize	National Average Wholesale, KES/90KG*	4,829.29	-22.95	-27.21	-11.10	-28.15
Finger Millet	National Average Wholesale, KES/90KG*	8,625.00	-9.43	-6.87	1.90	-9.85
Mixed Beans	National Average Wholesale, KES/90KG*	10,032.00	-4.43	-26.63	7.98	20.50
Pearl Rush Millet	National Average Wholesale, KES/90KG*	5,874.00	-21.46			
Red Irish potato	National Average Wholesale, KES/90KG*	3,900.00	96.77	2.36	58.22	196.45
Red Sorghum	National Average Wholesale, KES/90KG*	6,692.14	1.09	-16.46	0.43	11.19
Rice	National Average Wholesale, KES/90KG*	5,800.00	-14.88	-25.66	-16.03	-7.24
Sweet potatoes	National Average Wholesale, KES/90KG*	5,945.78	-1.27	-10.17	17.67	36.23
White Irish potato	National Average Wholesale, KES/90KG*	2,166.07	9.56	-46.59	-25.33	17.37
White Sorghum	National Average Wholesale, KES/90KG*	5,251.50	-21.35	-11.64	-19.96	-19.66

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

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Rwanda

Mixed trends were noted in the price changes of selected food commodities in Rwanda despite generally increased stocks from the season B harvests.[16] (Table 7). The prices of beans were generally higher in August than in July in most monitored markets except in Kabuga where it declined by 4%. Maize and sorghum prices, on the other hand, either declined or had low increases (0-5%) over the same period. Overall, all monitored food commodities registered higher prices in August 2023 than in August 2022.

[15] Ministry of Agriculture, Livestock, Fisheries and Co-operatives, Kenya (2023)
[16] https://fews.net/east-africa/rwanda

Table 7: Changes in prices in Rwanda[17]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Kabuga, Retail, RWF/KG*	1,000.00	-4.00	11.11	5.75	35.98
Bean (dry)	Kigeme, Retail, RWF/KG*	1,233.33	5.85	-2.37	7.94	67.04
Bean (dry)	Mugera, Retail, RWF/KG*	1,116.67	16.11	-7.59	3.88	80.75
Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG*	1,161.54	5.80	-7.66	-7.74	66.94
DAP	National Average USD/50KG	54.08	-7.51	-10.14		
Maize (white)	Kabuga, Retail, RWF/KG*	600.00	-11.70	5.88	44.00	13.39
Maize (white)	Kigeme, Retail, RWF/KG*	633.33	4.96	18.20	21.34	23.98
Maize (white)	Mugera, Retail, RWF/KG*	466.67	3.62	-7.50	-5.31	13.21
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	675.00	3.85	2.53	-3.57	20.90
Sorghum	Kigeme, Retail, RWF/KG	633.33	-2.56	-6.17	-6.17	5.56
Sorghum	Mugera, Retail, RWF/KG	600.00	0.00	13.21	20.00	26.32
Urea	National Average USD/50KG	41.68	-17.55	-19.89		

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

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South Sudan

Generally, most monitored markets recorded declines in the prices of the selected commodities in South Sudan in August compared to July (Table 8). For instance, maize had a significant drop in prices in Rumbek, Torit, and Yambio by 15.56%, 25.0%, and 27.73%, respectively. Meanwhile, maize prices were higher in Gogrial (33.33%) and Wau (5.01%). Similarly, sorghum prices experienced low (0-5%) and moderate (5-15%) declines in all markets except Rumbek and Wau. These drops in prices were due to the on-going harvests, which were albeit below-average in most regions, and increased food assistance.[18] Overall, the August 2023 prices were well above their levels in 3-12 months.

Table 8: Changes in prices in South Sudan[19]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Juba, SSP/KG*	936.08	-2.30	1.30	-2.59	45.21
Groundnuts	Juba, SSP/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, SSP/KG*	846.56	-4.52	9.10	5.98	32.02
Maize (white)	Rumbek, SSP/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, SSP/KG*	264.55	-7.50	-41.68	-26.99	22.35
Sorghum (Feterita)	Juba, SSP/KG*	932.36	-0.88	5.37	2.74	46.19
Sorghum (Feterita)	Rumbek, SSP/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, SSP/KG*	1,547.00	-3.67	17.29	18.36	0.06

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

[17] Author's construction based on data from WFP (2023).
[18] https://fews.net/east-africa/south-sudan
[19] Author's construction based on data from WFP (FAO (2023).

Tanzania

Due to the unavailability of data on Tanzania, the current price trend analysis is limited to May 2023, which shows that commodity prices in the monitored markets were higher than they were a year ago (Table 9). However, compared to the previous month, there was a general decline or stability of prices in most markets due to on-going harvests despite others registering low (0-5%) to moderate (5-15%) increases. For instance, beans prices declined in Kigoma and Morogoro but did not change in Moshi, while maize prices did not change in Morogoro and Moshi. Rice prices declined in Arusha and Kigoma but remained unchanged in Moshi over the past one month.

Table 9: Changes in prices in Tanzania[20]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Arusha (urban), Wholesale, TZS/100KG***	261,000.00	1.03	-11.53	0.38	53.53
Bean (dry)	Dodoma (Majengo), Wholesale, TZS/100KG***	310,000.00	6.53	0.81	21.57	55.35
Bean (dry)	Kigoma, Wholesale, TZS/100KG*****	279,850.50	-0.74	16.60	33.26	123.88
Bean (dry)	Morogoro, Wholesale, TZS/100KG***	265,000.00	-0.93	-14.97	-5.36	36.77
Bean (dry)	Moshi, Wholesale, TZS/100KG***	270,000.00	0.00	-22.86	-10.00	42.11
Maize (white)	Arusha (urban), Wholesale, TZS/100KG***	113,900.00	2.20	4.82	18.03	42.28
Maize (white)	Dodoma (Majengo), Wholesale, TZS/100KG***	121,000.00	2.02	2.43	10.00	60.51
Maize (white)	Kigoma, Wholesale, TZS/100KG***	120,147.50	1.85	20.15	23.48	98.59
Maize (white)	Morogoro, Wholesale, TZS/100KG***	103,516.00	0.00	-8.76	0.81	58.43
Maize (white)	Moshi, Wholesale, TZS/100KG***	120,000.00	0.00	-13.25	0.00	43.28
Rice (Wholesale)	Arusha (urban), TZS/100KG***	279,000.00	-1.72	-6.87	-8.52	25.86
Rice (Wholesale)	Dodoma (Majengo), TZS/100KG***	315,000.00	7.88	12.33	7.05	57.86
Rice (Wholesale)	Kigoma, TZS/100KG******	261,389.00	-4.95	21.58	24.47	63.37
Rice (Wholesale)	Morogoro, TZS/100KG***	286,000.00	2.14	-4.38	5.93	33.15
Rice (Wholesale)	Moshi, TZS/100KG***	310,000.00	0.00	-4.62	-1.59	47.62

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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

Due to increased supplies from new harvests[21], the prices of maize and beans in all markets either declined or did not change compared to the past 1-3 months (Table 10). Maize prices dropped significantly in August in Gulu and Mbale but did not change in Mbarara compared to the past 1-12 months. In addition, maize prices were even lower than 6 and 12 months ago, while beans prices generally remained above their one-year levels. The prices of all monitored commodities are expected to continue to decline in the next 3-6 months.

[20] Author's construction based on data from WFP (2023).
[21] https://fews.net/east-africa/uganda

Table 10: Changes in prices in Uganda[22]

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, Uganda Shilling/KG*	6,000.00	-8.23	-8.12	0.00	40.85	-49.42	-46.60
Beans	Lira, Wholesale, Uganda Shilling/KG*	4,000.00	-4.01	-16.23	-11.11	5.26	-55.43	-40.17
Beans	Mbale, Wholesale, Uganda Shilling/KG*	4,500.00	0.00	-18.18	12.50	38.46	-45.06	-55.13
Beans	Mbarara, Wholesale, Uganda Shilling/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, Uganda Shilling/KG*	1,529.00	-17.35	-23.55	7.93	-23.55	-11.68	-11.77
Maize	Lira, Wholesale, Uganda Shilling/KG*	1,167.00	-12.45	-28.73	-17.82	-23.87	-31.64	-3.55
Maize	Mbale, Wholesale, Uganda Shilling/KG*	1,450.00	-27.50	-25.64	-23.68	-18.68	-36.08	-34.04
Maize	Mbarara, Wholesale, Uganda Shilling/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 July 2023, *August, **June, ***May, ****April, 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**, poor temporal rainfall distribution resulted in below-average crop production in the southeastern marginal agricultural livelihood zones. Household food stocks are expected to be depleted by early September heightening the demand for market dependency for food supplies.

Southern Africa Food Security Update

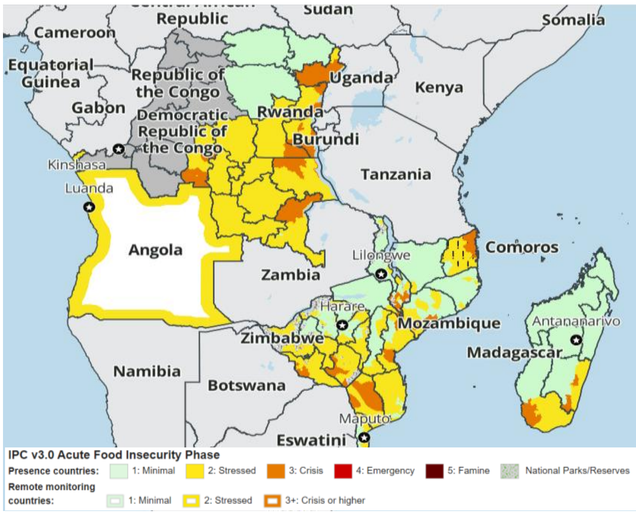

Figure 4: East Africa countries Food Security Outlook, Jun-Sep 2023

Malawi: IPC Phase 3 outcomes remain in the southern parts of the country, where food reserves are depleting fast. Maize prices have also surged, increasing by 110 percent during the current month and reducing access among low-income households[23].

Mozambique: The Southern and central Mozambique, parts of the country, which experienced poor harvests following prolonged dry spells or storms/cyclone earlier in the year, are experiencing IPC Phase 2 and 3 outcomes as food stocks are increasingly depleting[24].

Zimbabwe: Surplus producing regions in the northern parts of the country continue to enjoy IPC Phase 1 outcomes driven by adequate stocks from this year's harvests, while deficit-producing regions are beginning to experience IPC Phase 3 outcomes as the food reserves are gradually deteriorating[25].

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[22] Author's construction based on data from WFP (2023).
[23] https://fews.net/southern-africa/malawi
[24] https://fews.net/southern-africa/mozambique
[25] https://fews.net/southern-africa/zimbabwe

Prevalence of insufficient food consumption

As of August 31, 2023, 21.1 million people in four selected Southern African countries had insufficient food for consumption. This 2.9% increase from July 2023 indicates a deterioration of the region's food security situation. Malawi, Zambia, and Zimbabwe were the main contributors to the 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 (19.1 million) but decreased against the 2021 values (22.4 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	4.50	4.30	23.76	-4.44 ↘	13.16 ↑	86.96 ↑
Mozambique	29.50	8.30	8.30	29.15	3.61 ↗	0.00 ●	-20.37 ↓
Zambia	17.40	4.30	4.00	22.99	-6.98 ↘	66.67 ↑	81.82 ↑
Zimbabwe	14.40	4.00	3.90	27.78	0.00 ●	-28.57 ↓	-31.03 ↓

**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 prices in the Southern Africa region[27]

	Seasonality Patterns	The just concluded harvests, despite being below-average due to the various shocks such as cyclones, dry spells, etc., are sustaining lower food prices in Mozambique and Zambia,
	Weather Shocks	The aftermath of the past climatic shocks such as cyclone Freddy and dry spells have had a major impact on crop harvests, particularly in Malawi, where it is driving up 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

The prices of the monitored food commodities are generally elevated despite the fact that the harvest season just recently closed (Table 12). The current national average price of maize is MK595/kg against the government's minimum of MK500/kg. Some reports cite the prices of maize to be over MK1,000/kg.[28] Compared to a year ago, the prices are currently about 30% - 112.6% higher. Notably, however, maize and rice prices are lower in Lilongwe and Mzuzu, respectively, compared to the past 1-3 months.

[26] https://hungermap.wfp.org/
[27] FEWSNET, 2023. https://fews.net/southern-africa. Accessed 5th August 2023
[28] https://ratin.net/site/news_article/13428

Table 12: Changes in prices in Malawi[29]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Mzuzu, MWK/Kg***	1,276.00	-9.38	-9.34	27.31	84.39
Maize	Lilongwe, MWK/Kg***	325.00	-48.00	-40.91	-23.89	30.00
Maize	Liwonde, MWK/Kg	665.25	17.28	2.07	27.87	107.89
Maize	Mzimba, MWK/Kg	495.75	7.89	-4.32	4.37	100.71
Maize	Mzuzu, MWK/Kg	500.75	3.57	-23.90	8.39	61.53
Maize	National Average, MWK/Kg	595.00	18.94	3.45	20.14	91.94
Maize	Nsanje, MWK/Kg	634.00	38.13	43.20	12.16	87.57
Rice	Lilongwe, MWK/Kg***	1,600.00	6.67	14.29	14.29	33.33
Rice	Mzuzu, MWK/Kg***	1,770.00	-1.67	-1.67	17.65	112.61

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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

Due to the unavailability of data on Mozambique, the current price trend analysis remains limited to February 2023, which only presents the price change scenarios from the last four issues of this monitor. Thus, the prices remain generally lower in the country. Nonetheless, FEWSNET reports adequate supply of food following the just-completed harvest period resulting in lower food prices and minimal food insecurity situation in non-conflict affected areas.[30]

Table 13: Changes in prices in Mozambique[31]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize (white)	Angónia, Maize, Retail, MZN/KG#	20.00	0.00	28.45	74.98		-26.61	-4.02
Maize (white)	Maputo, Retail, MZN/KG#	22.64	-0.96	-0.96	0.09	-14.34	31.19	19.93
Maize (white)	Massinga, Retail, MZN/KG#	26.35	-3.48	-4.60	13.70	-18.03	6.32	11.01
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		-8.79	-9.59
Rice (imported)	Maputo, Retail, MZN/KG#	50.00	0.00	0.00	0.00	0.00	-3.35	0.01
Rice (imported)	Massinga, Retail, MZN/KG#	61.67	1.83	2.78	2.31	4.23	-3.22	2.15
Urea	Urea (MZN/50KG)**	3,351.00	0.00	0.21	-2.56			

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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 average national price of maize continued to decline in July (Table 14). Nonetheless, the current price was 12.93% higher than a year ago. Despite this, mealie meal has been reported to be in short supply and costlier, due to "external demand for maize grain in the Democratic Republic of the Congo (DRC) and other East African countries that were affected by drought and lack of grain supplies due to the war in Ukraine"[32]. Meanwhile, the national average prices of fertilizer were lower than they were 1-6 months ago as the offseason continues.

[29] Author's construction based on data from FAO (2023).
[30] https://fews.net/southern-africa/mozambique
[31] Author's construction based on data from WFP (2023).
[32] https://ratin.net/site/news_article/13370

Table 14: Changes in prices in Zambia[33]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	National Average, Retail, Kwacha/KG	4.96	-2.04	-8.93	12.93	38.99
NPK 10-20-10 + 6S	National, ZMW/50KG	882.00	0.00	-3.22	-2.97	
Urea	National, ZMW/50KG	850.00	0.00	-9.19	-8.96	

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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 **Malawi**, the main harvest was concluded in August and the country is now entering its lean season with most households expected to exhaust their food reserves earlier than usual[34]. In **Mozambique**, climate forecasts suggest a strong El Niño by late 2023, which will result in delayed and below-average rainfall in southern and central Mozambique, with average rainfall in the north[35]. **Zimbabwe** is also forecast to experience an El Niño by late 2023 that will also lead to below average and irregular rains in the upcoming season[36].

West Africa Food Security Update

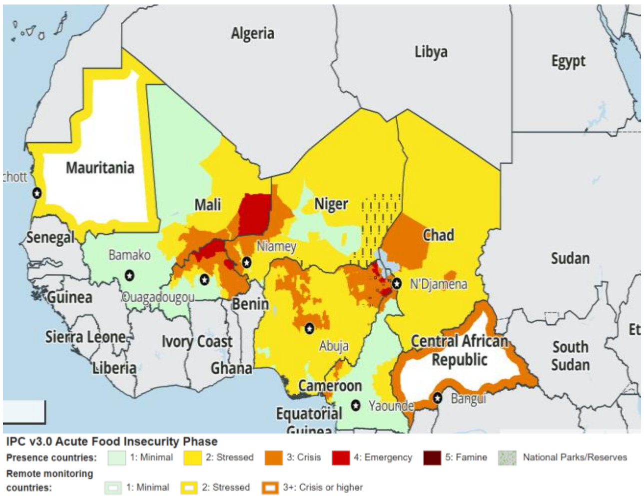

Figure 5: West **African countries Food Security Outlook, Jun-Sep 2023**

Burkina Faso: Trade in agricultural and livestock products continues to be marked by a slowdown in internal flows due to insecurity, and by the current ban on exports, particularly of cereals and cowpeas, limiting the number of foreign buyers on local market[37].

Mali: The market supplies of cereals remain adequate overall, except in the insecure Central and Northern regions such as in Ménaka, where disruptions to flows and even market functioning have been observed,[38].

Niger: Acute food insecurity Crisis (IPC Phase 3) outcomes are concentrated in the Tillabéry and Tahoua regions as well as in Diffa and Maradi, where persistence of terrorist attacks have not allowed for livelihood activities, and are preventing the distribution of food assistance in the regions[39].

Prevalence of insufficient food consumption

The number of people with insufficient food for consumption across the seven selected West African countries was 143.7 million as of August 31, 2023. This was a 13.9% increase from the previous month, indicating a deterioration in the food security situation across the monitored countries during the month, with all the monitored countries contributing to this upward trend. The number of food insecure people across the region is

[33] Author's construction based on data from FAO (2023).
[34] https://reliefweb.int/report/malawi/malawi-ipc-acute-food-insecurity-analysis-june-2023-march-2024-published-18-august-2023
[35] https://fews.net/southern-africa/mozambique
[36] https://fews.net/southern-africa/zimbabwe
[37] https://reliefweb.int/report/burkina-faso/burkina-faso-key-message-update-prolonged-consumption-deficits-threaten-survival-populations-blockaded-areas-july-2023
[38] https://reliefweb.int/report/mali/mali-key-message-update-severe-deterioration-livelihoods-linked-insecurity-leads-emergency-ipc-phase-4-menaka-july-2023
[39] https://reliefweb.int/report/niger/niger-key-message-update-low-precipitation-pastoral-area-prolongs-lean-period-poor-pastoralist-households-july-2023

also currently higher compared to the same period last year (114.4 million people) and two years ago (108.6 million people).

Table 15: Prevalence of insufficient food consumption in selected West African countries (August 2023)[40]

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	10.80	11.30	58.08	6.48 ↗	-7.26 ↘	1.77 ↗
Cote d'Ivoire	25.10	3.60	3.10	15.54	8.33 ↗	-22.00 ↓	-13.33 ↓
Ghana	29.80	5.00	5.00	19.46	16.00 ↑	-17.14 ↓	5.45 ↗
Mali	19.10	12.70	13.20	70.16	5.51 ↗	8.06 ↗	25.23 ↑
Niger	22.40	17.00	17.90	94.20	24.12 ↑	21.26 ↑	70.16 ↑
Nigeria	202.80	75.10	74.40	42.21	13.98 ↑	48.35 ↑	38.06 ↑
Togo	7.90	1.50	1.90	24.05	26.67 ↑	-24.00 ↓	-13.64 ↓

*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[41]

	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	Some West African countries have begun harvesting, and thus improving food supplies, thereby lowering food prices.

Burkina Faso

Overall, despite this being a lean season, the prices of maize and millet being monitored in Burkina Faso are lower mainly due to food assistance[42] (Table 16). Compared to June, the maize prices recorded in July in Batie, Bousse, and Ouagadougou indicated a decline, but low-to-moderate increases were reported in Dori, Faramana, Ouargaye, and Titao. Meanwhile, millet prices declined in most markets except in Batie and Titao. The current prices are also generally lower than a year ago, except in Batie, where they are higher by 20.41%. The prospects of the next 3-6 months show generally lower prices.

[40] https://hungermap.wfp.org/
[41] FEWSNET, 2023. Accessed at https://fews.net/west-africa on 31st July 2023.
[42] https://fews.net/west-africa/burkina-faso

Table 16: Changes in prices in Burkina Faso[43]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Batié, Retail, XOF/KG	263.00	-3.31	-3.31	-0.75	-5.40	-29.07	-22.26
Maize	Bousse, Retail, XOF/KG	244.00	-1.61	-6.15	0.41	-17.01	-7.04	-6.75
Maize	Dori, Retail, XOF/KG	353.00	3.52	6.65	8.28	-0.56	-22.83	-17.48
Maize	Faramana, Retail, XOF/KG	145.00	13.28	-4.61	-8.81	-36.12	1.75	0.06
Maize	Gourcy, Retail, XOF/KG	253.00	0.00	-1.94	-2.69	-19.94	-9.78	-0.30
Maize	Ouagadougo (Sankaryare), Retail, XOF/KG	243.00	-2.02	-1.62	-6.18	-27.03	-4.38	14.09
Maize	Ouargaye, Retail, XOF/KG	234.00	5.88	14.71	11.96	-2.90	-32.42	-29.63
Maize	Titao, Retail, XOF/KG	347.00	10.16	-4.41	-26.95	-10.10	-41.00	-30.33
Millet	Batié, Retail, XOF/KG	407.00	2.01	9.12	-1.45	20.41	-20.50	-29.47
Millet	Bousse, Retail, XOF/KG	276.00	-5.80	-14.81	-12.10	-20.46	-22.67	7.33
Millet	Dori, Retail, XOF/KG	389.00	0.00	-1.77	-5.35	-12.39	-12.69	-9.30
Millet	Faramana, Retail, XOF/KG	190.00	-1.04	-19.49	-13.64	-37.29	-13.52	-0.63
Millet	Gourcy, Retail, XOF/KG	255.00	-2.30	-3.77	-5.90	-37.65	-18.29	8.38
Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	329.00	-0.30	4.44	-1.50	-24.54	-10.87	9.79
Millet	Ouargaye, Retail, XOF/KG	245.00	-2.00	4.26	-0.81	-34.84	-3.95	2.43
Millet	Titao, Retail, XOF/KG	395.00	11.90	-4.36	-27.52	-6.84	-55.07	-42.54

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

Cote d'Ivoire

Changes in the prices of maize and rice in Cote d'Ivoire show mixed trends (Table 17). Compared to the previous month, the July reports show declines in maize prices in in Korhogo, and an 18.75% increase in Man. Meanwhile, rice prices were unchanged in Man, but had low increases of between 2% and 4% in Korhogo. The outlook for the next 3-6 months shows that price would decline significantly as new harvests kick in. The prices of urea fertilizer experienced a low increase between April and July but remained lower than 6 months ago by 26.17%.

Table 17: Changes in prices in Cote d'Ivoire[44]

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	226.56	-1.58	-17.61	15.59	-33.59	-11.71	-6.36
Maize (white)	Man, Retail, XOF/KG	356.25	18.75	42.50	18.55	1.79	-36.71	-12.45
Rice (denikassia imported)	Korhogo, Retail, XOF/KG	460.94	2.43	-2.96	-2.96	-6.72	-25.33	-24.46
Rice (denikassia imported)	Man, Retail, XOF/KG	450.00	0.00	0.00	0.75	6.99	-4.66	-6.19
Rice (Local)	Korhogo, Retail, XOF/KG	473.44	4.00	5.21	1.00	5.04	-22.07	-19.66
Rice (Local)	Man, Retail, XOF/KG	550.00	0.00	10.00	3.12	16.87	-12.17	-15.28

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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 have begun to decline amidst new harvests in Ghana (Table 18). Compared to July, the August prices showed mostly declines and low increases of less than 4%. In fact, all surges in prices were less than 1%, except for the prices of yellow maize and yam (puna), which increased by 2.12% and 3. 51%, respectively. The August food prices were mostly higher than they were 3-12 months ago, while fertilizer prices were mostly lower.

[43] Author's construction based on data from WFP (2023).
[44] Author's construction based on data from WFP (2023).

Table 18: Changes in prices in Ghana[45]

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	39.56	0.05	-1.81	12.93	-17.45
NPK 23-10-5	National Average, USD/50KG	39.79	-1.85	-0.92	-0.67	-17.45
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	38.48	-0.82	-9.42	-19.68	-32.66
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 July 2023, *August, **June, ***May, ****April, 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

In July, the registered food commodity prices generally showed stability or downward trends except in a few markets, which had some increments (Table 19). Despite it being the peak of the lean season, there is largely a satisfactory supply of cereals on the market.[46] The prices of millet in July were overall lower than 1-12 months ago except in Gao and Mopti, where 38.3% and 4.0% increments were registered, respectively, over the previous month. The price of rice also declined or remained unchanged in most markets except Sikasso, where it increased by 90%. The prices of rice were, however, generally higher than their levels a year ago. Furthermore, sorghum prices were generally lower compared to most periods, except in a few markets. For instance, compared to June, sorghum prices were in July, 10% and 4% higher in Bamako and Kayes, respectively. Notably, the sorghum prices registered in July were significantly lower by between 22% and 33% than the same period last year.

[45] Author's construction based on data from the Ghana Ministry of Food and Agriculture (2023).
[46] https://fews.net/west-africa/mali

Table 19: Changes in prices in Mali[47]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Millet	Bamako, Wholesale, XOF/100 KG	23,000.00	0.00	-16.36	-8.00	-36.99
Millet	Gao, Wholesale, XOF/100 KG	32,500.00	38.30	0.00	-7.14	-23.53
Millet	Kayes, Wholesale, XOF/100 KG	27,000.00	-6.90	-10.00	-16.92	-32.50
Millet	Mopti, Wholesale, XOF/100 KG	26,000.00	4.00	-10.34	-1.89	-30.67
Millet	Ségou, Wholesale, XOF/100 KG	19,000.00	0.00	-24.00	-20.83	-49.33
Millet	Sikasso, Wholesale, XOF/100 KG	25,000.00	0.00	4.17	0.00	-37.50
Millet	Tombouctou, Wholesale, XOF/100 KG	35,000.00	0.00	-2.78	0.00	-19.54
Rice	Bamako, Wholesale, XOF/100 KG	46,000.00	0.00	0.00	0.00	12.20
Rice	Gao, Wholesale, XOF/100 KG	47,500.00	0.00	0.00	5.56	10.47
Rice	Kayes, Wholesale, XOF/100 KG	50,000.00	-3.85	0.00	0.00	13.64
Rice	Mopti, Wholesale, XOF/100 KG	45,000.00	0.00	-2.17	0.00	12.50
Rice	Ségou, Wholesale, XOF/100 KG	47,500.00	0.00	0.00	3.26	18.75
Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	-5.26	-10.00	0.00	12.50
Rice	Tombouctou, Wholesale, XOF/100 KG	46,000.00	-8.00	-4.17	2.22	3.37
Rice (imported)	Bamako,Wholesale, XOF/100 KG	43,000.00	0.00	0.00	0.00	10.26
Rice (imported)	Gao, Wholesale, XOF/100 KG	45,000.00	0.00	0.00	7.14	23.29
Rice (imported)	Kayes, Wholesale, XOF/100 KG	38,000.00	-2.56	-20.00	-6.17	5.56
Rice (imported)	Mopti, Wholesale, XOF/100 KG	44,000.00	0.00	4.76	10.00	12.82
Rice (imported)	Sikasso, Wholesale, XOF/100 KG	47,500.00	90.00	7.95	13.10	18.75
Sorghum	Bamako, Wholesale, XOF/100 KG	22,000.00	10.00	-4.35	-2.22	-34.33
Sorghum	Gao, Wholesale, XOF/100 KG	35,000.00	0.00	-12.50	16.67	-22.22
Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	4.17	8.70	-10.71	-32.43
Sorghum	Mopti, Wholesale, XOF/100 KG	24,000.00	0.00	-9.43	9.09	-27.27
Sorghum	Ségou, Wholesale, XOF/100 KG	20,000.00	0.00	-20.00	-11.11	-29.82
Sorghum	Sikasso, Wholesale, XOF/100 KG	20,000.00	-4.76	-11.11	-9.09	-31.03
Sorghum	Tombouctou, Wholesale, XOF/100 KG	33,000.00	0.00	-8.33	-5.71	-25.00

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

Niger

The July prices of food commodities in Niger showed mixed results (Table 20). Compared to June, maize, millet, and sorghum prices only declined or remained unchanged in Abalak and Goure, respectively. However, the current prices were generally higher than 3-6 months ago, and generally lower or are low to moderately higher in certain markets compared to a year ago. Disruptions caused by insecurity, the July coup d'état and its attendant sanctions, as well as the limited financial capacity of the government to provide food assistance negatively affected food supplies and prices in the market.[48] Meanwhile, the price of Urea dropped by 4% compared to June due to low demand as the planting period is over.

[47] Author's construction based on data from WFP (2023)
[48] https://fews.net/west-africa/niger

Table 20: Changes in prices in Niger[49]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Abalak, Retail, XOF/KG	330.00	-8.59	-0.90	-0.90	-16.03	-9.24	8.59
Maize	Bonkaney, Retail, XOF/KG	302.00	14.83	30.17	30.74	3.78	-22.02	-4.72
Maize	Goure, Retail, XOF/KG	400.00	0.00	23.84	25.79	2.30	-22.98	-2.50
Maize	Katako, Retail, XOF/KG	310.00	23.02	32.48	33.62	5.44	-17.33	-11.06
Millet	Abalak, Retail, XOF/KG	340.00	-5.03	-2.30	2.72	-16.26	-12.59	6.16
Millet	Bonkaney, Retail, XOF/KG	341.00	12.91	11.07	15.59	-3.40	-10.92	-8.90
Millet	Goure, Retail, XOF/KG	360.00	0.00	4.96	13.21	-6.01	-15.57	2.87
Millet	Katako, Retail, XOF/KG	333.00	10.26	5.71	19.35	-7.50	-11.60	-2.58
Sorghum	Abalak, Retail, XOF/KG	329.00	-0.90	4.78	21.40	-0.15	-7.57	5.74
Sorghum	Bonkaney, Retail, XOF/KG	331.00	11.45	11.07	19.06	6.43	-16.50	-13.29
Sorghum	Goure, Retail, XOF/KG	329.00	0.00	0.92	17.92	-3.52	-18.72	6.89
Sorghum	Katako, Retail, XOF/KG	327.00	9.73	9.00	17.20	1.24	-17.68	-6.73
Urea	National Average, USD/50KG*****	33.73	-4.07					

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

Nigeria

Overall, the prices of monitored food commodities in Nigeria remain highly elevated compared to the past 1-12 months (Table 21). Compared to June, maize prices are between 20% and 41% higher, while millet is between 18% and 29% costlier, and sorghum 15% to 34% more expensive. The increase in rice prices is, however, lower - between 1.8% and 8% - with some markets such as Giwa and Lagos reporting declining rice prices. Conflicts, the impact of the lean season on the availability of stocks, and poor macroeconomic conditions such as the depreciation of the local currency, as well as the impacts of the removal of fuel subsidies are driving higher commodity prices.[50] The prices of all types of fertilizers have significantly dropped amidst low off-season demands.

[49] Author's construction based on data from WFP (2023)
[50] https://fews.net/west-africa/nigeria

Table 21: Changes in prices in Nigeria[51]

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Nigeria	Maize (white)	Giwa, NGN/KG	371.33	20.27	60.75	81.14	101.81
Nigeria	Maize (white)	Ibadan, NGN/KG	400.00	20.66	49.03	46.41	58.73
Nigeria	Maize (white)	Kano, NGN/KG	404.13	37.36	63.35	76.78	88.25
Nigeria	Maize (white)	Kaura Namoda, NGN/KG	399.65	34.26	66.77	71.44	84.41
Nigeria	Maize (white)	Lagos, NGN/KG	407.25	41.04	53.56	65.01	60.84
Nigeria	Maize (white)	Maiduguri, NGN/KG	390.00	20.00	59.84	82.24	78.90
Nigeria	Millet	Giwa, NGN/KG	423.33	23.60	51.19	84.86	61.58
Nigeria	Millet	Ibadan, NGN/KG	414.00	21.85	34.59	41.20	56.82
Nigeria	Millet	Kano, NGN/KG	366.85	18.47	35.00	43.70	33.81
Nigeria	Millet	Kaura Namoda, NGN/KG	404.50	31.02	62.37	53.85	63.66
Nigeria	Millet	Lagos, NGN/KG	406.50	29.36	30.29	43.13	48.57
Nigeria	Millet	Maiduguri, NGN/KG	365.00	21.67	47.18	55.98	41.47
Nigeria	NPK 15-15-15	National, USD/50KG	34.49	-31.03	-39.87	-39.73	-44.04
Nigeria	NPK 20-10-10	National, USD/50KG	31.09	-30.15	-38.65	-41.10	-44.88
Nigeria	Rice (imported)	Giwa, NGN/KG	726.67	-1.13	-4.89	-6.36	29.76
Nigeria	Rice (imported)	Ibadan, NGN/KG	673.50	3.94	-0.07	3.30	13.00
Nigeria	Rice (imported)	Kaura Namoda, NGN/KG	707.00	3.44	4.33	6.88	16.77
Nigeria	Rice (imported)	Lagos, NGN/KG	764.00	-1.64	-5.35	-12.83	23.15
Nigeria	Rice (imported)	Maiduguri, NGN/KG	840.00	0.60	3.96	-0.24	23.53
Nigeria	Rice (milled)	Giwa, NGN/KG	1,506.67	1.80	14.84	35.49	42.14
Nigeria	Rice (milled)	Ibadan, NGN/KG	1,436.00	4.89	10.12		47.13
Nigeria	Rice (milled)	Kano, NGN/KG	719.00	8.27	21.66	15.41	28.58
Nigeria	Rice (milled)	Kaura Namoda, NGN/KG	1,357.10	2.84	20.05	20.55	43.27
Nigeria	Rice (milled)	Maiduguri, NGN/KG	1,400.00	2.19	8.70	27.27	44.03
Nigeria	Sorghum (white)	Giwa, NGN/KG	396.67	34.46	88.89	98.33	103.42
Nigeria	Sorghum (white)	Ibadan, NGN/KG	450.00	26.76	60.71	60.71	58.90
Nigeria	Sorghum (white)	Kano, NGN/KG	334.18	28.99	47.12	53.66	42.97
Nigeria	Sorghum (white)	Kaura Namoda, NGN/KG	407.60	34.63	60.12	63.43	71.15
Nigeria	Sorghum (white)	Lagos, NGN/KG	373.50	24.76	31.14	33.11	40.31
Nigeria	Sorghum (white)	Maiduguri, NGN/KG	310.00	15.89	49.04	64.89	49.04
Nigeria	Urea	National, USD/50KG	24.48	-26.35	-40.35	-46.92	-47.71

Note: Last price is for July 2023, *August, **June, ***May, ****April, 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%)

Togo

Mixed changes are observed in the prices of food commodities recorded in July in Togo (Table 22). Compared to the previous month, maize prices were only significantly higher in Anie and Lomé, by 3.75% and 5.93%, respectively, while the prices of imported rice were higher in Amegnran and Anie - 3.64% and 4.35%, respectively. The price of sorghum was mostly elevated in most markets except Cinkasse, where it remained unchanged. The prices of these commodities were all higher compared to 6 months ago except for maize in Amegnran, while compared to 3 and 12 months ago, mixed changes were observed.

[51] Author's construction based on data from FAO (2023)

Table 22: Changes in prices in Togo[52]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Amegnran, XOF/Kg	250.00	0.00	-3.85	-2.72	-13.79
Maize (white)	Anie, XOF/Kg	249.00	3.75	-0.40	13.18	3.75
Maize (white)	Cinkassé, XOF/Kg	265.00	1.92	1.92	5.16	1.92
Maize (white)	Kara, XOF/Kg	291.00	-14.41	6.99	15.48	3.93
Maize (white)	Korbongou, XOF/Kg	260.00	0.00	-1.89	4.00	0.00
Maize (white)	Lomé, XOF/Kg	286.00	5.93	6.32	7.12	-1.38
Rice (imported)	Amegnran, XOF/Kg	570.00	3.64	1.79	1.79	3.64
Rice (imported)	Anie, XOF/Kg	480.00	4.35	3.23	4.35	4.35
Rice (imported)	Cinkassé, XOF/Kg	465.00	0.00	-1.06	1.09	0.00
Rice (imported)	Kara, XOF/Kg	485.00	-1.02	-3.96	5.43	5.43
Rice (imported)	Korbongou, XOF/Kg	540.00	-1.82	8.00	8.00	10.20
Rice (imported)	Lomé, XOF/Kg	490.00	0.00	0.00	6.52	6.52
Sorghum	Anie, XOF/Kg	350.00	16.67	12.90	32.08	25.00
Sorghum	Cinkassé, XOF/Kg	300.00	0.00	0.00	20.00	0.00
Sorghum	Kara, XOF/Kg	390.00	14.71	9.86	41.30	18.18
Sorghum	Korbongou, XOF/Kg	310.00	3.33	1.64	20.62	0.00
Sorghum	Lomé, XOF/Kg	475.00	31.94	35.71	39.71	48.44

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

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Seasonal Monitor and Crop Yield Forecasts

In **Burkina Faso**, the current agricultural season has been characterized by a poor spatial and temporal distribution of rainfall in all regions of the country. In addition, the reduced access to inputs by producers due to prices being 50-60 percent higher than average, could lead to the underutilization of these fertilizers and adversely affect yields[53]. In **Mali**, the agricultural season is progressing at an average pace across the country, thanks to continued rainfall, which has, albeit, been poorly distributed over time, delaying crop sowing in the country's southern agricultural zones. Cereal production forecasts are up 8.8 percent on the five-year average, according to the 2023/2024 seasonal estimates by the Direction Nationale de l'Agriculture[54]. In **Niger**, poor distribution of rainfall over time and space has resulted in water stress that has damaged and even caused the loss of young seedlings locally in agricultural and agropastoral areas[55]

[52] Author's construction based on data from FAO (2022)
[53] https://reliefweb.int/report/burkina-faso/burkina-faso-key-message-update-prolonged-consumption-deficits-threaten-survival-populations-blockaded-areas-july-2023
[54] https://reliefweb.int/report/mali/mali-key-message-update-severe-deterioration-livelihoods-linked-insecurity-leads-emergency-ipc-phase-4-menaka-july-2023
[55] https://reliefweb.int/report/niger/niger-key-message-update-low-precipitation-pastoral-area-prolongs-lean-period-poor-pastoralist-households-july-2023

Food Trade Updates

Continental

The month of August 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 China Development Bank (CDB) signed a development-focused agreement to provide the African Export-Import Bank (Afreximbank) with a US$400-million term loan facility to support the financing of small and medium-sized enterprises (SMEs) involved in extra- and intra-African trade and those engaged in the productive sectors in Afreximbank Member States across Africa[56].

East Africa

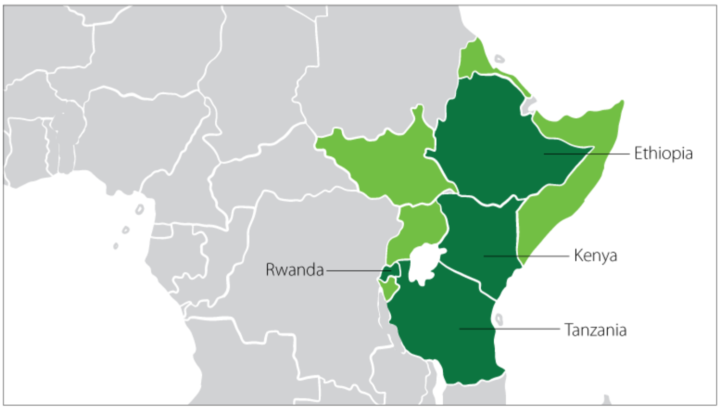
The following are some of the major events and activities that occurred during the month with implications on regional food trade within the East African region:

- The East African Business Council (EABC) has entered into a $178,530 partnership with Afreximbank to foster intra-African trade. The initiative will largely focus on trade promotion within the context of the African Continental Free Trade Area (AfCFTA) agreement. Under it, deliberate efforts would be made to engage the private sector in trade facilitation and in unlocking new business opportunities in the East African region[57].

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.

[56] https://www.afreximbank.com/afreximbank-and-china-development-bank-sign-us400-million-loan-to-support-africa-smes/
[57] https://www.thecitizen.co.tz/tanzania/news/business/regional-lobby-moves-to-boost-intra-african-trade-4333232

Figure 6: East Africa Cross border trade updates August 2023



ETHIOPIA

- The World Bank said the Addis-Djibouti corridor will get a significant upgrade with a $730 million grant following the newly-approved Regional Economic Corridor Project by the Horn of Africa Initiative.

RWANDA

- The government has authorized 35 domestic manufacturers to import over 213,000 tonnes of sugar for industrial purposes, without incurring import duties in the current fiscal year.
- Goods from Rwanda can now access the Gabon, Ghana, Togo, Botswana, and South African markets duty-free, while at the same time, service providers from Côte d'Ivoire, Cameroon, and Lesotho can issue their services in Rwanda, without barriers to market access or national treatment.

TANZANIA

- The Tanzania Ports Authority (TPA) has offered several incentives to Ugandan shippers, among them a 30–day free storage period for all imports.
- Several members of the Tanzania parliament have criticised the move by the government to restrict food exports to Uganda and Kenya as capable of hindering free trade. The move has left farmers stuck with huge stocks of food amidst price declines.

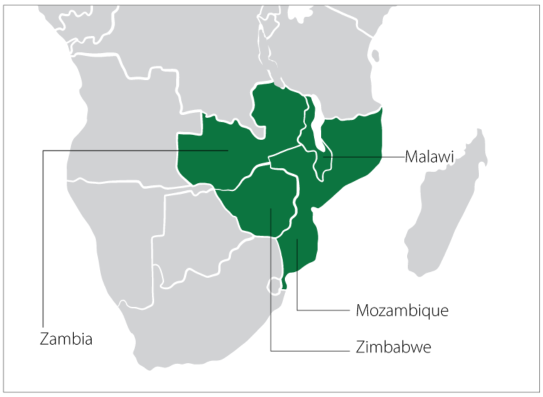
KENYA

- The government has granted licenses to Kenyan sugar companies to import the commodity out of the Common Market for Eastern and Southern Africa (COMESA). This is meant to dampen the high price of the product, currently retailing at about Sh510 for a two-kilo packet.
- The Kenyan government's intention to impose an Export Development and Promotion Levy (EIPL) on imports, which might result in Kenya losing trade with its EAC allies, has been contested by the Kenya Association of Manufacturers (KAM), the Federation of Kenya Employers, and tax consulting businesses.
- The government has committed to increasing trade volumes with Mozambique to help create a favourable trade balance for Kenya.
- Kenya's imports from Tanzania have dropped following new guidelines by Tanzania to restrict the issuance of export permits for goods going to Kenya and Uganda.

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



MALAWI

- The Minister of Trade and Industry, Simplex Chithyola Banda, has emphasized the critical role of export credit finance in promoting trade and investment, and as an essential tool for boosting exports facilitation.

MOZAMBIQUE

- Mozambique's $170 Million Negomano-Roma Road project was unveiled, marking a major milestone in enhancing trade between Mozambique and Tanzania.

ZAMBIA

- The introduction of a 24-hour border operation between Namibia and Zambia is anticipated to provide a boost to the operations of the Walvis Bay Port.

ZIMBABWE

- The Reserve Bank of Zimbabwe (RBZ) has started implementing the Pan-African Payment and Settlement System (PAPSS) aimed at connecting all banks, non-bank financial institutions, switches, and regional systems to

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 European Union (EU) has invested €120 million to boost the competitiveness of exports from Ghana and other West African countries.

Figure 8: West Africa Cross Border Trade Updates August 2023[58]

GHANA

- The EU has injected over GH¢100 million into three main value chains, namely cassava, mango and pineapple, and cosmetics and personal care products to boost export competitiveness.

NIGERIA

- A decision by West African nations to shut down their borders with Niger as a way of sanctioning its coup plotters is harming local businesses in northern Nigeria, where a cross-border economy has boomed for years.

[58] https://www.myjoyonline.com/gcb-bank-completes-first-pan-african-payment-and-settlement-system-client-transaction-in-ghana/
https://sunnewsonline.com/nigeria-papss-sign-mou-to-accelerate-cross-border-transactions/
https://www.russia-briefing.com/news/proposals-made-for-establishing-a-joint-russia-african-bank.html/

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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For more information contact:

Food Trade Unit, Policy and State Capability (PSC) Division
E-mail: foodtrade@agra.org

AGRA
Sustainably Growing
Africa's Food Systems

AGRA
West End Towers, 4th Floor
Muthangari Drive, off Waiyaki Way, Nairobi, Kenya
PO Box 66773, Westlands 00800, Nairobi, Kenya

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