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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.

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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 July Food Security Monitor are summarised below:

Global Food Security update

Russia suspended the Black Sea Grain Initiative on 17th of July 2023. Prior to this suspension, 20,008 MT of wheat and 27,000MT of maize had been shipped to Ethiopia and Tunisia, respectively.

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, food security situations remained stable on account of the just-ended harvests.

In West Africa, food prices remain above average despite declines in some markets across the region.

Food Trade

In East Africa, the Government of Tanzania, through its Ministry of Agriculture, has suspended the issuance of permits to Ugandan traders exporting rice and maize flour from the country. This has seen about 200 heavy trucks loaded with rice and maize grains barred from crossing into Uganda through the Mutukula one-stop border post.

In Southern Africa, The Agricultural Marketing Authority in Zimbabwe is negotiating with its Botswana counterpart to establish an export corridor that will facilitate the exportation of its local horticultural products to Botswana.

Commodity Prices

In East Africa**,** food commodities prices are declining in countries such as Rwanda, Kenya, and Uganda as harvests have picked-up in some parts. However, in Ethiopia and South Sudan the prices remain mostly elevated.

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.

Mixed trends are also observed in West Africa, where Burkina Faso, Cote d'Ivoire, Mali, and Togo are experiencing lower prices, as Ghana, Niger, and Nigeria experience higher prices.

Introduction

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

Food Security Dashboard

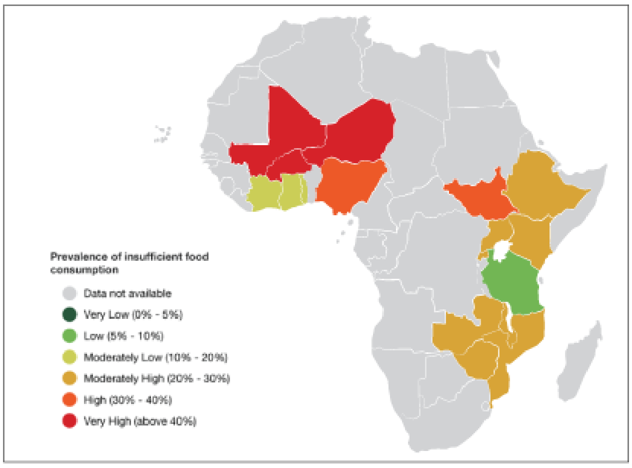
The Food Security Dashboard (Table 1 and Figure 1) offers a concise overview of fluctuations in the number of people experiencing Insufficient Food Consumption (IFC)[1], snapshots of hunger hotspots, and average changes in food prices[2] over the past two years. ***Figure 1*** displays the prevalence of IFC in July across 17 countries selected from East, Southern, and West Africa. During this month, the number of food insecurity hotspots, defined as countries where over 50% of the total population has IFC, remained at three viz., Burkina Faso (54.6%), Mali (66.5%), and Niger (75.9%). However, three more countries – South Sudan, Nigeria, and Uganda – are approaching hotspot status. Meanwhile, the number of people with IFC decreased in Cote d'Ivoire, Ghana, South Sudan, Tanzania, Togo, Uganda, and Zimbabwe compared to a similar time last year and two years ago. Additionally, the average national maize prices over the last six months have been high in most monitored countries except in Burkina Faso, Niger, Rwanda, and Uganda. The situation is much better compared to a year ago, with the average national maize prices lower in Burkina Faso, Cote d'Ivoire, Mozambique, Niger, and Togo.

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	0.00	●	8.00	↑	-1.41	↓	-16.29	↓
Cote d'Ivoire	-30.77	↓	-14.29	↓	0.00	●	-17.73	↓
Ethiopia	20.83	↑	37.28	↑	19.36	↑	40.71	↑
Ghana	-21.88	↓	-15.25	↓	17.00	↑	51.35	↑
Kenya	-0.82	↓	51.25	↑	7.09	↑	-4.11	↓
Malawi	18.42	↑	104.55	↑	6.83	↑	96.18	↑
Mali*	12.39	↑	25.74	↑	14.50	↑	40.51	↑
Mozambique	10.67	↑	-31.97	↓	29.59	↑	-16.18	↓
Niger	0.00	●	50.44	↑	9.44	↑	-7.73	↓
Nigeria	36.30	↑	35.80	↑	20.35	↑	22.09	↑
Rwanda	14.81	↑	24.00	↑	-6.84	↓	21.17	↑
South Sudan	-40.00	↓	-35.00	↓	38.82	↑	120.08	↑
Tanzania	-7.41	↓	-10.71	↓	10.46	↑	60.62	↑
Togo	-28.57	↓	-40.00	↓	13.40	↑	-1.18	↓
Uganda	-34.44	↓	-34.00	↓	-1.53	↓	11.08	↑
Zambia	72.00	↑	95.45	↑	12.93	↑	38.99	↑
Zimbabwe	-24.53	↓	-31.03	↓				

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

Figure 1: Hunger Hotspots Snapshot, June 2023



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

[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.

Global Market Update

Black Sea Grain Initiative

Russia suspended the Black Sea Grain Initiative on the 17th of July, prior to which 20,008 MT of wheat and 27,000MT of maize had been shipped to Ethiopia and Tunisia, respectively.

Table 2: Shipment of commodities under the Black Sea Grain Initiative

Country	Commodity	Volume traded (May 2023, MT)	Volume traded (Cumulative, MT)
Algeria	Wheat		212 220
Egypt	Wheat		291 849
	Soybeans		121 840
	Corn		965 173
	Sunflower meal		1,503
	Sunflower oil		3,100
Ethiopia	Wheat	20,008	262, 759
Kenya	Corn		44,000
	Wheat		332,936
Libya	Barley		110,781
	Corn		391,300
	Wheat		53,800
	Sunflower meal		2,700
Morocco	Sunflower meal		111,217
Somalia	Wheat		53,500
Sudan	Wheat		65,340
Tunisia	Corn	27,000	356,598
	Barley		99,300
	Wheat		222,150
	Vegetable oil		3,300
	Soya oil		5,170

Source: United Nations[3]

Global Food Prices

The FAO Food Price Index (FFPI) went up by 1.3% from June, largely driven by a 12.1% increase in the vegetable oils price index, which was offset by a 3.9% decline in the sugar price index, and marginal (less or equal to 0.5%) declines in the cereal, dairy, and meat indices.[4] The rise in the vegetable price index was a result of higher sunflower, palm, soy, and rapeseed oil prices emanating from the uncertainties surrounding supplies from the Black Sea region after Russia announced the termination of the Black Sea Grain Initiative. Similarly, the International Grain Council's Grain and Oil Index (GOI) showed 3.72% rise from June driven by a rise in the wheat, rice, soybean, and barley price indices with only the maize price index showing a marginal decline. Compared to July 2022, however, the GOI is 9.76% lower, supported by a decline in all sub-indices except rice, which went up 32.18% compared to July last year.

[3] https://www.un.org/en/black-sea-grain-initiative/vessel-movements
[4] https://www.fao.org/worldfoodsituation/foodpricesindex/en/

Figure 2: FAO Food Price Index (FFPI)[5]

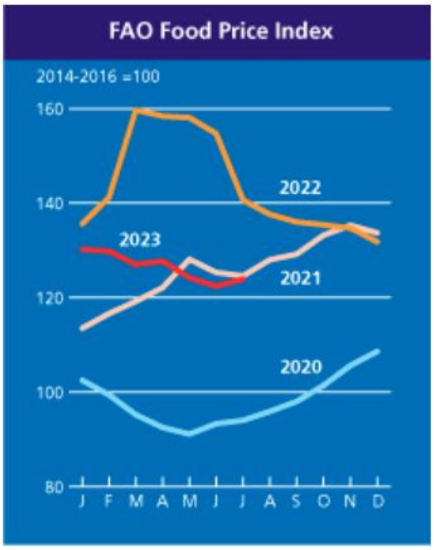


Table 3: IGC GOI Commodity Price Indices[6]

Jan 2000 = 100	27-Jul	*% Change 1M*	*% Change 1Yr*
GOI	280.90	*3.72*	*-9.76*
Wheat	251.88	*3.52*	*-15.62*
Maize	247.18	*-0.73*	*-16.32*
Rice	227.99	*9.65*	*32.18*
Soyabeans	289.51	*3.88*	*-8.83*
Barley	234.83	*5.28*	*-27.77*

Global Fertilizer Prices

Global fertilizer prices continue to fall over the past one month and year due to increased supplies and low off-season demands. All types of fertilizers have declined between 1.6% and 3.7% in July over June, while compared to the same period last year this reduction ranged from approximately 20% to 32% (table 4).

Table 4: Global Fertilizer Prices[7]

Date Range	DAP	MAP	POTASH	UREA
Jul 18-22 2022	1007	1043	887	836
Aug 15-19 2022	978	1026	881	807
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 5-9 2022	920	950	819	784
Jan 2-6 2022	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
Jun 19-21 2023	825	827	618	619
Jul 17-21 2023	807	812	608	596
% Change Jun-Jul 2023	-2.2	-1.8	-1.6	-3.7
% Change Jul 2022-Jul 2023	-19.9	-22.1	-31.5	-28.7

Source: DTN

[5] FAO, 2023. Accessed at https://www.fao.org/worldfoodsituation/foodpricesindex/en/ on 2nd June 2023
[6] Author's construction based on data from IGC GOI, 2023. Accessed at https://www.igc.int/en/markets/marketinfo-goi.aspx
[7] https://www.dtnpf.com/agriculture/web/ag/crops/article/2023/07/26/urea-drops-600-per-ton-first-time

Food Insecurity Updates

East Africa Food Security Update

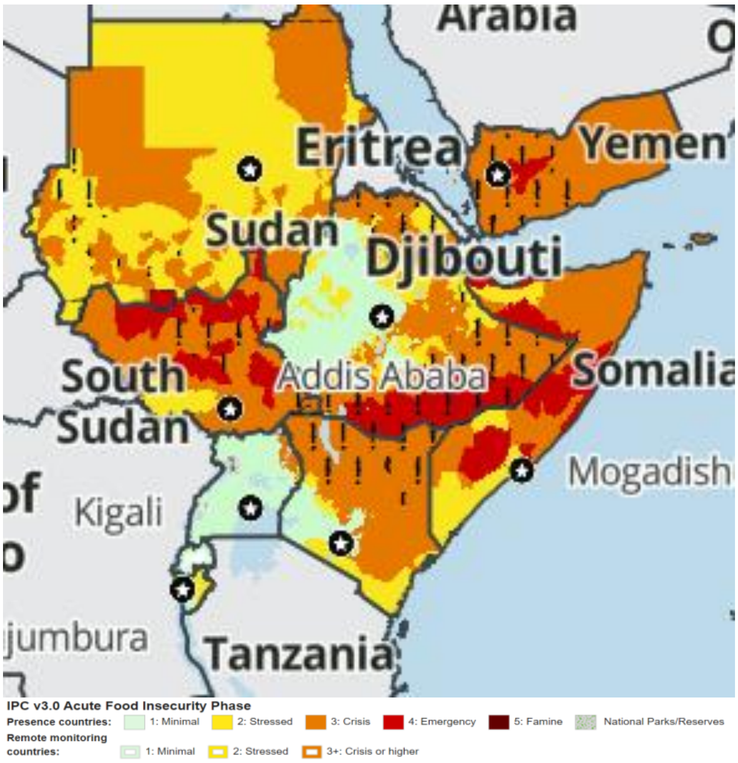


Figure 3: East Africa countries Food Security Outlook, Jun-Sep 2023

Ethiopia: The food insecurity situation remains unchanged from the previous month, with macroeconomic challenges continuing to drive high levels of food insecurity across the country.

Kenya: The food security situation remains dire heightening the need for humanitarian assistance to prevent severe outcomes during the ongoing dry season in Turkana, Marsabit, Wajir, and Mandera[8]. Nonetheless, prices have begun to decline as the new harvest pick up in some parts of the country and it is expected to drive lower IPC outcomes in coming months.

Rwanda: IPC Phase 1 outcomes remain in place owing to the enhanced food availability from the Season B harvest, and reduced commodity prices related to the removal of Value Added Tax and increased availability of income-generating activities[9].

South Sudan: IPC Phase 4 outcomes remain in place in many areas through the harvest period given anticipated conflict and the forecasts of below-average rainfall in the east, where crop production is already typically limited, and households may only harvest a few months of stocks[10].

Uganda: IPC Phase 1 outcomes were recorded in the western, southern, and parts of central bimodal Uganda, due to seasonal increases in access to food and income alongside first season harvesting in June. However, the eastern parts of the country that had poor seasonal performance due to delayed rains are experiencing IPC Phase 2 outcomes that are projected to prevail until November[11].

Prevalence of insufficient food consumption

As of 31st July 2023, 57.2 million people across six selected East African countries did not have enough food for consumption, representing a 12.9% decrease from the previous month. This suggests that food security has improved across these countries in the last one month, with Kenya, Rwanda, South Sudan and Uganda driving the decrease. The number of food insecure people in the region was, however, lower in July 2023 than the same time last year (61.1 million) and higher than in 2021 (54.0 million). *Table 5* below provides updates on variations in the prevalence of insufficient food consumption across the selected East African countries during the month of July 2023.

[8] https://reliefweb.int/report/kenya/kenya-food-security-outlook-june-2023-january-2024
[9] https://reliefweb.int/report/rwanda/rwanda-key-message-update-average-season-b-green-harvest-supports-minimal-food-security-outcomes-july-2023
[10] https://fews.net/east-africa/south-sudan
[11] https://fews.net/east-africa/uganda

Table 5: Prevalence of insufficient food consumption across selected East African countries (July 2023)[12]

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	●	20.83	↑	37.28	↑
Kenya	51.40	12.10	14.40	23.54	-15.97	↓	-0.82	↘	51.25	↑
Rwanda	12.30	3.10	3.60	25.20	-13.89	↓	14.81	↑	24.00	↑
South Sudan	11.00	3.90	4.80	35.45	-18.75	↓	-40.00	↓	-35.00	↓
Tanzania	56.30	5.00	5.00	8.88	0.00	●	-7.41	↘	-10.71	↓
Uganda	42.70	9.90	16.10	23.19	-38.51	↓	-34.44	↓	-34.00	↓

*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[13]

	Climatic Shocks	The impact of past climatic shocks and seasonal flooding in some countries are driving lower crop outputs and higher food prices.
	Conflicts	Conflicts and insecurity persist in some East African countries driving strong demand from influx of refugees and returnees resulting in higher food commodity prices.
	Seasonal Dynamics	Seasonal harvests are increasing supplies in some markets and causing declines in prices. However, in South Sudan the lean season persist and coupled with other factors causing higher food 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

The prices of food commodities in Ethiopia are largely high, particularly compared to the past 3-12 months due mainly to seasonal changes in stocks, macroeconomic challenges, and conflicts (table 6). The available commodity prices from May, however, show signs of low increases (less than 5%), except for teff in Diredawa, where it is higher by 6.63%. Some declines in prices were also observed in markets such as Shashemene, Diredawa, Addis Ababa for maize, sorghum, and wheat. All types of fertilizer have also registered low increases compared to the past 1-3 months probably due to ongoing planting in the Western and Belg areas. Africa Fertilizer Watch actually reported fertilizer shortages in the Belg areas.[14] However, the Ethiopian government is

[12] https://hungermap.wfp.org/
[13] Reliefweb, 2023. https://reliefweb.int/report/ethiopia/usaidbha-ethiopia-assistance-overview-april-2023 accessed on 1st May 2023.
[14] https://africafertilizerwatch.org/#/en

implementing a subsidy program worth 21 billion ETB to make fertilizer more affordable to farmers in the 2023/24 cropping season than last year.[15]

Table 6: Changes in prices in Ethiopia[16]

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
NPS 19-38-0 + 7S	National Average, USD/50KG*****	41.11	1.21	2.88		
NPSB 18.9-37.7-0 + 6.95S + 0.1B	National Average, USD/50KG*****	41.56	1.19	2.79		
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
Urea	National Average, USD/50KG*****	42.60	1.16	2.70		
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 June 2023, *July, **May, ***April, ****March, and *****February

= 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

The reported prices in July for Kenya are mostly lower than in June for most monitored food commodities, except for finger millet, red sorghum, sweet potatoes, and wheat, which saw low-to-moderate increases in prices (table 7). Generally, the current prices are also lower than the past 3-12 months for most commodities except arrowroot, sweet potatoes, rice, and both types of sorghum. FEWSNET noted that despite Kenya importing a third of its maize need between January and June this year, it still fell short of the estimated 900,000 MT required.[17] In addition, the country also expects below-average harvests in most parts of the country, although the ongoing harvests are projected to be 2% higher than 2022.[18] Meanwhile, the depreciation of the Kenyan Shilling (KES) and tight global market coupled with high fuel prices are contributing to high landing costs for imported maize making it more expensive than local maize[19] but still lower than June prices.

Table 7: Changes in prices in Kenya[20]

[15] Ibid
[16] Author's construction based on data from FAO (2023)
[17] https://fews.net/east-africa/kenya
[18] Akademiya2063, June 2023. AAgWa Crop Production. Forecasts Brief Series – Kenya Maize.
[19] Ibid
[20] Ministry of Agriculture, Livestock, Fisheries and Co-operatives, Kenya (2023)

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Arrow Root	National Average Wholesale, KES/90KG*	9,469.00	-11.85	-2.98	16.90	30.81
Beans (Yellow-Green)	National Average Wholesale, KES/90KG*	15,062.00	-6.39	-1.51	7.80	35.86
Beans Red Haricot (Wairimu)	National Average Wholesale, KES/90KG*	12,623.00	-3.50	0.99	30.67	36.81
Calcium Ammonium Nitrate (USD_50_KG)	National Average USD/50KG	36.49	-5.59	-12.54	-19.64	-31.01
Diammonium Phosphate (USD_50_KG)	National Average USD/50KG	41.20	-2.09	-11.61	-20.03	-21.64
Dry Maize	National Average Wholesale, KES/90KG*	6,268.00	-8.88	-2.63	7.09	-4.11
Finger Millet	National Average Wholesale, KES/90KG*	9,523.00	0.45	7.58	14.57	-9.09
NP 23-23-0 (USD_50_KG)	National Average USD/50KG	40.43	-4.44	-14.70	-21.72	-21.46
NPK 17-17-17 (USD_50_KG)	National Average USD/50KG	40.60	-4.11	-15.63	-21.39	-22.36
Red Sorghum	National Average Wholesale, KES/90KG*	6,620.00	0.53	-6.97	4.66	8.78
Rice	National Average Wholesale, KES/90KG*	6,814.00	-2.38	-10.69	0.03	6.89
Sweet potatoes	National Average Wholesale, KES/90KG*	6,022.00	11.69	4.77	33.90	52.64
Urea (USD_50_KG)	National Average USD/50KG	38.41	-6.75	-14.21	-23.50	-37.74
Wheat	National Average Wholesale, KES/90KG*	7,707.00	5.93	10.37	0.76	5.37
White Irish potato	National Average Wholesale, KES/90KG*	1,977.00	-26.64	-52.85	-27.52	11.37
White Sorghum	National Average Wholesale, KES/90KG*	6,677.00	-2.51	4.71	2.19	3.54

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

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

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

Rwanda

The prices of beans, maize and sorghum are generally lower in July in most monitored markets compared to the past 1-3 months (table 8). This is mostly due to supplies from the season B harvests and removal of VAT in April.[21] Nonetheless, maize prices remain higher in Kabuga and Kigeme, as sorghum prices are elevated in Mugera compared to the past 1-12 months. All the commodity prices are overall higher by between 16% and 90% than the past one year, and the ongoing lean season is sustaining higher food prices in certain areas. Meanwhile, the prices of all types of fertilizers were lower in July than in June and April as planting has been completed in some regions.[22]

Table 8: Changes in prices in Rwanda[23]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Bean (dry)	Kabuga, Retail, RWF/KG*	1,133.33	-1.45	5.23	37.84	90.48
Bean (dry)	Kigeme, Retail, RWF/KG*	1,177.78	7.52	-18.25	7.54	84.75
Bean (dry)	Mugera, Retail, RWF/KG*	991.67	-12.86	-20.13	1.88	60.27
Bean (dry)	Nyabiheke (Camp), Retail, RWF/KG*	1,131.88	-8.76	-14.31	20.27	82.58
DAP	National Average USD/50KG*	54.08	-7.51	-10.14		
Maize (white)	Kabuga, Retail, RWF/KG*	700.00	12.00	48.67	17.48	31.25
Maize (white)	Kigeme, Retail, RWF/KG*	605.56	10.03	4.74	2.30	16.27
Maize (white)	Mugera, Retail, RWF/KG*	450.00	-20.73	-12.20	-25.07	17.65
Maize (white)	Nyabiheke (Camp), Retail, RWF/KG*	500.00	-18.11	-1.32	-22.08	19.50
NPK 17-17-17	National Average USD/50KG*	54.68	-5.04	-4.56		
Sorghum	Kabuga, Retail, RWF/KG	650.00	-7.14	0.00	-10.34	34.85
Sorghum	Kigeme, Retail, RWF/KG	650.00	0.00	-7.14	-10.34	18.18
Sorghum	Mugera, Retail, RWF/KG	600.00	9.09	20.00	11.63	50.00
Urea	National Average USD/50KG*	41.68	-17.55	-19.89		

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

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

[21] https://fews.net/east-africa/rwanda
[22] https://africafertilizerwatch.org/#/en
[23] Author's construction based on data from WFP (2023).

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

South Sudan

Overall, the prices of food commodities in South Sudan remain higher than 1-12 months ago (table 9). Despite this, some markets such as Aweil, Gogrial, Torit, and Yambio have recorded lower/stable maize prices, while Aweil and Yambio have recorded lower/stable sorghum prices. The ongoing lean season, conflicts, seasonal flooding, strong demand from influx of refugees and returnees, and limited crop output from the immediate season are contributing to high food prices.[24]

Table 9: Changes in prices in South Sudan[25]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	Juba, SSP/KG	958.10	3.68	3.81	10.27	124.83
Groundnuts	Juba, SSP/KG	2,000.00	21.65	21.95	39.08	110.30
Maize (white)	Aweil, SSP/KG	600.00	-7.69			50.00
Maize (white)	Gogrial, SSP/KG	514.80	0.00	5.88	12.50	176.92
Maize (white)	Juba, SSP/KG	876.02	12.90	11.50	16.69	108.94
Maize (white)	Rumbek, SSP/KG	858.00	41.18	70.16	20.00	-15.21
Maize (white)	Torit, SSP/KG	810.38	-5.55	41.67	102.39	88.90
Maize (white)	Wau, SSP/KG	815.10	14.00	20.76	42.50	106.07
Maize (white)	Yambio, SSP/KG	672.10	0.00	67.86		324.95
Sorghum (Feterita)	Aweil, SSP/KG	618.62	-6.20	25.03	49.79	111.64
Sorghum (Feterita)	Bor, SSP/KG	1,430.00	15.39	42.86	66.67	257.14
Sorghum (Feterita)	Gogrial, SSP/KG	495.64	9.27	43.58	52.28	146.16
Sorghum (Feterita)	Juba, SSP/KG	983.27	11.12	10.87	14.37	133.56
Sorghum (Feterita)	Rumbek, SSP/KG	900.90	35.02	62.96	26.00	186.36
Sorghum (Feterita)	Wau, SSP/KG	817.10	14.28	24.22	42.85	92.65
Sorghum (Feterita)	Yambio, SSP/KG	514.80	0.00		125.00	
Wheat (flour)	Juba, SSP/KG	1,575.00	19.41	25.00	38.40	41.38

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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 available price data in May shows mixed trends for Tanzania (table 10). Overall, all commodity prices in the monitored markets are higher than they were a year ago. Compared to the previous month, however, there is generally a 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 have declined in Kigoma and Morogoro but did not change in Moshi, while maize prices have not changed in Morogoro and Moshi, and rice prices declined in Arusha and Kigoma but remained unchanged in Moshi, over the past one month.

Table 10: Changes in prices in Tanzania[26]

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

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 June 2023, *July, **May, ***April, ****March, and *****February

= 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

Generally, the prices of food commodities are declining as a result of increased supplies from new harvests, except for those of beans and maize in Gulu compared to the past 3-12 months. Compared to the past one month, however, most monitored markets recorded lower or stable prices except Gulu and Mbarara for beans, and Mbale for maize. Below-average rainfall in the eastern and northern bimodal areas has, however, reduced crop outputs and prevented adequate price recovery.[27] Fertilizer prices remain mostly lower or stable compared to the past 1-6 months.

Table 11: Changes in prices in Uganda[28]

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

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
AMMONIUM SULPHATE	National Average, Retail, UGX/50KG	175,000.00	0.00	0.00	-2.78	
Beans	Mbale, Wholesale, Uganda Shilling/KG	5,250.00	-4.55	16.67	50.00	57.52
Beans	Gulu, Wholesale, Uganda Shilling/KG	6,678.00	2.27	17.42	17.99	40.59
Beans	Lira, Wholesale, Uganda Shilling/KG	4,500.00	-5.76	10.51	28.57	28.57
Beans	Mbarara, Wholesale, Uganda Shilling/KG	5,500.00	7.32	22.22	37.50	50.97
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	Lira, Wholesale, Uganda Shilling/KG	1,625.00	-0.76	6.91	8.33	-4.41
Maize	Mbale, Wholesale, Uganda Shilling/KG	2,000.00	2.56	-4.76	-11.11	-0.84
Maize	Mbarara, Wholesale, Uganda Shilling/KG	2,500.00	0.00	0.00	0.00	20.71
Maize	Gulu, Wholesale, Uganda Shilling/KG	1,933.00	-3.35	18.05	-3.35	28.87
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 June 2023, *July, **May, ***April, ****March, and *****February

= 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

The seasonal outlook for most of the monitored countries remains unchanged from the previous month. In **Rwanda**, average rains are projected from August to September leading to average harvests, but which will enhance food availability and offset the impacts of the lean season. In **Uganda**, the Karamoja areas are going through a lean season following below-average harvests due to delayed and low rainfalls from the previous season. In **Tanzania**, harvesting is ongoing in the northern, north-eastern and coastal bimodal rainfall areas for the *Masika* crops planted between February and March. Meanwhile, the *Msimu* harvest is about to be finalised in the southern and central unimodal rainfall areas[29].

Southern Africa Food Security Update

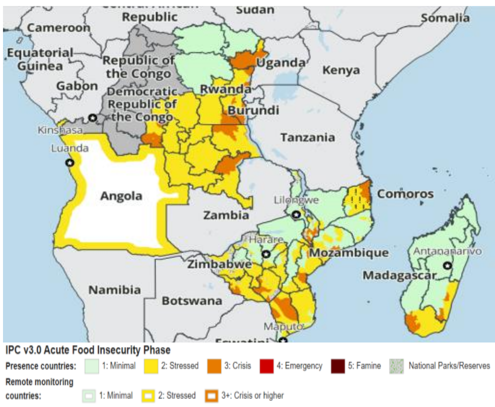


Figure 4: East Africa countries Food Security Outlook, Jun-Sep 2023

Malawi: IPC Phase 3 outcomes due the impacts of Tropical Cyclone Freddy are expected to persist until January 2024 sustained by high food and non-food commodity prices[30].

Mozambique: Most rural households continue to enjoy IPC Phase 1 outcomes sustained by food availability from this year's harvest. IPC Phase 2 and IPC Phase 3 outcomes continue to be recorded across the drought, flood, and cyclone-affected areas of southern and central Mozambique, where food reserves have been depleted and livelihoods continue to be disrupted.[31]

Zimbabwe: Below-average harvests across the deficit regions continue to drive IPC Phase 3 outcomes in those areas while IPC Phase 1 outcomes remain in place in the surplus producing regions.

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[29] https://reliefweb.int/report/united-republic-tanzania/giews-country-brief-united-republic-tanzania-13-july-2023
[30] https://fews.net/southern-africa/malawi
[31] https://fews.net/southern-africa/mozambique

Prevalence of insufficient food consumption

As of July 31, 2023, 21.1 million people in four selected Southern African countries had insufficient food for consumption. This 2.9% increase from June 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 12: Prevalence of insufficient food consumption in selected Southern African Countries (July 2023)[32]

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	24.86	4.65	↗	18.42	↑	104.55	↑
Mozambique	29.50	8.30	8.30	28.14	0.00	●	10.67	↑	-31.97	↓
Zambia	17.40	4.30	4.00	24.71	7.50	↗	72.00	↑	95.45	↑
Zimbabwe	14.40	4.00	3.90	27.78	2.56	↗	-24.53	↓	-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[33]

	Seasonality Patterns	The immediate past harvests in the Southern Africa region, despite been below-average due to the cyclone are sustaining lower food prices in Mozambique and Zambia.
	Weather Shocks	The impacts of the past climatic shocks such as cyclone Freddy and dry spells have had a major impact on crop harvests. This has driven lower stocks in particularly Malawi and putting upward pressure on prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, driven by forex shortages, high food inflation, and high fuel and transport costs, in particularly Malawi, are driving high food prices.

Malawi

The prices of food commodities are generally high in Malawi despite the immediate past harvests, except in Mzuzu, where the prices of cassava, maize, and rice fell, and in Lilongwe, where the price of maize fell steeply by 48% (table 13). Most prices in May/June were, however, well below those from three months earlier. Nonetheless, current reports indicate that prices remain very high as the country has limited stocks due to below average harvests from the aftermath of cyclone Freddy. Also, macroeconomic challenges such as foreign exchange shortages and high fuel prices are adding further pressure on food prices,[34] leading the Malawian government to relax its import requirements for maize.[35]

Table 13: Changes in prices in Malawi[36]

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[32] https://hungermap.wfp.org/
[33] FEWSNET, 2023. https://fews.net/southern-africa. Accessed 27th January 2023
[34] https://fews.net/southern-africa/malawi
[35] https://www.malawivoice.com/2023/07/26/malawi-has-no-maize-to-feed-her-people-ministry-of-agriculture-sounds-sos/
[36] Author's construction based on data from FAO (2023).

Country	Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Malawi	Cassava	Mzuzu, MWK/Kg**	1,276.00	-9.38	-9.34	27.31	84.39
Malawi	Maize	Lilongwe, MWK/Kg**	325.00	-48.00	-40.91	-23.89	30.00
Malawi	Maize	Liwonde, MWK/Kg	567.25	0.67	-25.56	14.60	104.05
Malawi	Maize	Mzimba, MWK/Kg	459.50	16.70	-22.74	-2.91	87.55
Malawi	Maize	Mzuzu, MWK/Kg	483.50	-1.83	-29.54	6.67	101.46
Malawi	Maize	National Average, MWK/Kg	500.25	5.65	-28.18	6.83	96.18
Malawi	Maize	Nsanje, MWK/Kg	459.00	13.83	-42.77	-7.51	74.52
Malawi	Rice	Lilongwe, MWK/Kg**	1,600.00	6.67	14.29	14.29	33.33
Malawi	Rice	Mzuzu, MWK/Kg**	1,770.00	-1.67	-1.67	17.65	112.61

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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 three issues of this monitor. Thus, prices remained generally lower in the country. Nonetheless, FEWSNET reports that the prices recorded in May indicated persistent stability due to increased supplies from the new harvests.[37] The prices of all types of fertilizers also show declining trends due to low off-season demand.

Table 14: Changes in prices in Mozambique[38]

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 June 2023, *July, **May, ***April, ****March, and *****February

= 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 continues to decline in June (table 15). Despite this, the price of maize in June remains well above the 6- and 12-month levels by 12.93% and 38.99%, respectively. The prices of NPK and urea fertilizers remains lower as the country progresses through the lean season.

Table 15: Changes in prices in Zambia[39]

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 June 2023, *July, **May, ***April, ****March, and *****February

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

[37] https://fews.net/southern-africa/mozambique
[38] Author's construction based on data from WFP (2023).
[39] Author's construction based on data from FAO (2023).

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

Seasonal Monitor and Crop Yield Forecasts

The season outlook for the Southern Africa region remains unchanged from last month's forecasts. In **Malawi**, the upcoming 2023/24 agricultural season is expected to be influenced by the El nino, which may lead to delayed start of the rainfall season, below-normal precipitation, and dry spells. In **Mozambique**, post-flood harvests for replanted rice and maize are expected to be minimal while in the lowland areas post-flood harvests for replanted rice and maize are expected to be minimal. In **Zimbabwe**, a mixed start to the upcoming rainy season is expected due to the effects of the El Nino, with rains falling between December and March projected to be below average.

West Africa Food Security Update

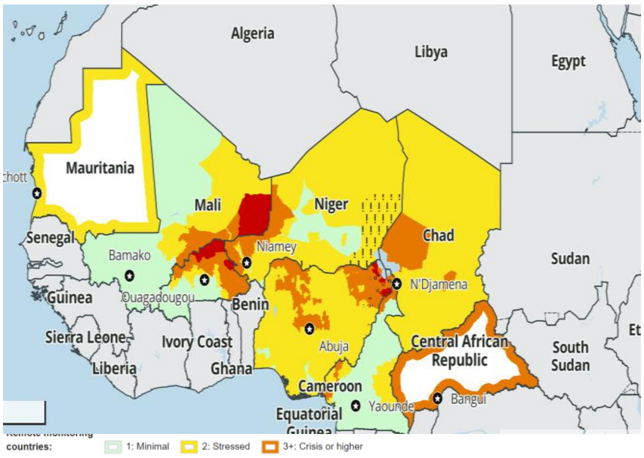

Figure 5: West **African countries Food Security Outlook, Jun-Sep 2023**

Burkina Faso: Trade in agricultural products and livestock is marked by a general slowdown in internal flows due to insecurity and by the measures like export bans, particularly for cereals and cowpeas, limiting market attendance[40].

Mali: The supply of grain markets remains sufficient overall, except in the insecure central and northern areas, where flow disruptions or even market dysfunctions such as Ménaka have been observed. The current Crisis (IPC Phase 3) food insecurity will continue until September 2023 for poor households in the insecure areas of the North, particularly in the Liptako Gourma area.

Niger: Across the country, market supplies are currently below the normal levels, primarily due to depleted stocks and disruptions in cross-border flows caused by insecurity and restrictions imposed by Mali and Burkina Faso

Nigeria: The macroeconomic crisis, atypically high staple food prices, and low household purchasing power severely limit access to food as households enter the peak of the 2023 lean season.

Prevalence of insufficient food consumption

The number of people with insufficient food for consumption across the seven selected West African countries stood at 125.7 million as of July 31, 2023. This 0.9% decrease from the previous month indicates a marginal improvement in the region's food security situation during the month. The countries that contributed to this improvement include Burkina Faso, Mali, Niger, Nigeria and Togo. Compared to the same period last year (107.9 million people) and two years ago (99.3 million people), the number of food insecure people across the region is currently higher.

Table 16: Prevalence of insufficient food consumption in selected West African countries (July 2023)[41]

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41 https://hungermap.wfp.org/

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	54.55	-4.42	0.00	8.00
Cote d'Ivoire	25.10	3.60	3.10	14.34	16.13	-30.77	-14.29
Ghana	29.80	5.00	5.00	16.78	0.00	-21.88	-15.25
Mali	19.10	12.70	13.20	66.49	-3.79	12.39	25.74
Niger	22.40	17.00	17.90	75.89	-5.03	0.00	50.44
Nigeria	202.80	75.10	74.40	37.03	0.94	36.30	35.80
Togo	7.90	1.50	1.90	18.99	-21.05	-28.57	-40.00

*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[42]

	Insecurity & Armed Conflicts	Conflict and insecurity in parts of the West African region 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.
	Seasonal Dynamics	The West African countries are mostly in their lean season resulting in depleted stocks.

Burkina Faso

Overall, the current prices of selected commodities demonstrate downward trends mainly due to the past immediate harvests and increased food aid to areas under blockade due to conflicts[43] (table 17). Most markets have also registered lower prices than in June 2022, except Batie, which recorded a 12.71% higher millet price, with prospects for the next 3-6 months also showing that prices will generally be lower despite the lean season which begun in June. Nonetheless, maize and millet prices have shown low (0-5%) to moderate (5-15%) increases in Dori, Ouagadougou, and Ouargaye, particularly compared to the past 1-3 months. In addition, FEWSNET reports that many regions in the country are experiencing higher food prices as a result of the conflict which is disrupting trading activities.[44]

Table 17: Changes in prices in Burkina Faso[45]

[42] FEWSNET, 2023. Accessed at https://fews.net/west-africa on 31st July 2023.
[43] https://fews.net/west-africa/burkina-faso
[44] https://fews.net/west-africa/burkina-faso
[45] Author's construction based on data from WFP (2023).

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Batié, Retail, XOF/KG	272.00	-6.53	1.12	-4.56	-5.23	-31.42	-24.83
Maize	Bousse, Retail, XOF/KG	248.00	-4.62	-4.62	0.00	-15.65	-8.54	-8.26
Maize	Dori, Retail, XOF/KG	341.00	5.25	3.65	21.35	-3.94	-20.12	-14.58
Maize	Faramana, Retail, XOF/KG	128.00	-15.79	-21.47	-20.99	-44.10	15.26	13.35
Maize	Gourcy, Retail, XOF/KG	253.00	-0.39	-2.69	-2.69	-19.68	-9.78	-0.30
Maize	Ouagadougo (Sankaryare), Retail, XOF/KG	248.00	0.81	-1.20	2.90	-20.26	-6.30	11.79
Maize	Ouargaye, Retail, XOF/KG	221.00	2.31	4.25	17.55	-4.33	-28.44	-25.49
Maize	Titao, Retail, XOF/KG	315.00	-11.76	-18.81	-24.82	-17.11	-35.00	-23.25
Millet	Batié, Retail, XOF/KG	399.00	-5.90	4.45	-0.75	12.71	-18.90	-28.06
Millet	Bousse, Retail, XOF/KG	293.00	-6.39	-12.54	-18.38	-15.32	-27.16	1.10
Millet	Dori, Retail, XOF/KG	389.00	0.00	-5.35	-4.42	-8.25	-12.69	-9.30
Millet	Faramana, Retail, XOF/KG	192.00	-11.93	-22.27	-10.28	-34.02	-14.43	-1.66
Millet	Gourcy, Retail, XOF/KG	261.00	-0.38	-15.26	-5.78	-36.03	-20.17	5.89
Millet	Ouagadougo (Sankaryare), Retail, XOF/KG	330.00	3.13	0.92	-17.71	-18.52	-11.14	9.46
Millet	Ouargaye, Retail, XOF/KG	250.00	6.84	3.73	-4.58	-20.38	-5.87	0.38
Millet	Titao, Retail, XOF/KG	353.00	-13.48	-21.03	-30.37	-15.35	-49.72	-35.70

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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

Despite the lean season, the prices of maize and imported rice remain largely lower than the past 1-12 months, while those of local rice was higher (table 18). Compared to May, the prices of maize and imported rice fell by between 3.58% and 7.69% in June. The current prices of the three monitored crops are also below those recorded a year ago except for the prices of rice (both imported and local) in Man. Forecasts show as well that the prices of all monitored commodities would decline in the next 3-6 months as new harvests kick in. Fertilizer prices remain generally low in Cote d'Ivoire due to lower international market prices and government of Ivory Coast's increased imports to meet demands.[46]

Table 18: Changes in prices in Cote d'Ivoire[47]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize (white)	Korhogo, Retail, XOF/KG	230.21	-3.58	-5.98	24.70	-21.17	-12.95	-9.34
Maize (white)	Man, Retail, XOF/KG	300.00	-7.69	14.29	-0.61	-14.29	-24.84	3.96
Rice (denikassia imported)	Korhogo, Retail, XOF/KG	450.00	-5.26	-6.71	-5.26	-2.46	-22.79	-23.32
Rice (denikassia imported)	Man, Retail, XOF/KG	450.00	-5.26	0.00	2.18	12.50	-4.66	-6.19
Rice (Local)	Korhogo, Retail, XOF/KG	455.21	7.11	0.01	1.16	-3.05	-18.24	-19.49
Rice (Local)	Man, Retail, XOF/KG	550.00	10.00	10.00	12.60	14.15	-12.17	-15.28

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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

Almost without exception all national average food prices in July remain well above the levels of June and the past 3-12 months, which is reflective of the seasonal patterns (table 19). Compared to June, however, the price of cassava dropped by 3.34%, while most food commodities have only experienced low-to-moderate price surges. Following lower international prices, the price of urea in Ghana remains below its levels in the past 1-12 months. However, the prices of NPK fertilizer types are only lower in July compared to June but remain above those of the past 3-12 months.

Table 19: Changes in prices in Ghana[48]

[46] https://africafertilizerwatch.org/#/en
[47] Author's construction based on data from WFP (2023).
[48] Author's construction based on data from the Ghana Ministry of Food and Agriculture (2023).

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava	National Average, Retail, GHS/KG*	3.79	-3.34	11.06	23.81	42.88
Cassava Dough	National Average, Retail, GHS/KG*	7.45	7.54	31.89	12.60	58.11
Maize (white)	National Average, Retail, GHS/KG*	7.14	2.98	12.32	17.00	51.35
Maize (Yellow)	National Average, Retail, GHS/KG*	7.32	1.01	11.07	16.88	45.81
Millet	National Average, Retail, GHS/KG*	10.75	2.59	5.81	7.07	36.06
NPK 20-10-10	National, USD/50KG	39.54	-1.91	5.95	8.63	
NPK 23-10-5	National, USD/50KG	40.54	0.57	8.92	4.22	-19.44
Plantain (Apem)	National Average, Retail, GHS/KG*	9.84	19.96	42.41	74.74	-14.20
Plantain (Apentu)	National Average, Retail, GHS/KG*	10.66	12.51	50.47	90.15	-6.54
Rice - Imported (non-perfumed)	National Average, Retail, GHS/KG*	12.72	3.71	8.59	2.72	68.12
Rice - Imported (perfumed)	National Average, Retail, GHS/KG*	18.38	2.04	2.96	7.96	77.08
Rice Local (perfumed)	National Average, Retail, GHS/KG*	14.20	0.50	3.54	3.65	82.15
Rice Local (non-perfumed)	National Average, Retail, GHS/KG*	12.18	2.14	7.11	9.84	109.27
Sorghum	National Average, Retail, GHS/KG*	9.43	2.57	4.77	15.26	54.34
Soya Bean	National Average, Retail, GHS/KG*	10.38	5.54	9.83	14.66	59.21
Urea	National, USD/50KG	38.80	-2.85	-13.47	-20.67	-32.06
Yam (Puna)	National Average, Retail, GHS/KG*	9.33	10.96	22.14	42.08	13.93
Yam (White)	National Average, Retail, GHS/KG*	6.40	8.29	19.79	37.09	23.32

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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, most monitored food commodities in Mali have registered lower prices than the past 1-6 months, with the price of rice being lower than in the past 6-12 months except in Kayes where the price of imported rice remains consistently higher than the past 1-12 months (table 20). Sorghum, however, demonstrated generally higher prices. For instance, Segou and Sikasso have registered higher (11% -100%) prices than in the past 1-12 months although all markets for sorghum registered lower prices in July compared to June. Despite the lean season, grain supplies remain sufficient partly due to adequate off-season harvests up to May and humanitarian assistance that is dampening most food prices, except in the insecure regions.[49]

Table 20: Changes in prices in Mali[50]

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

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Millet	Bamako, Wholesale, XOF/100 KG*	36,000.00	-1.37	-12.20	44.00	56.52
Millet	Gao, Wholesale, XOF/100 KG*	40,000.00	-5.88	-9.09	14.29	70.21
Millet	Kayes, Wholesale, XOF/100 KG*	35,000.00	-12.50	-6.67	0.00	20.69
Millet	Mopti, Wholesale, XOF/100 KG*	36,000.00	-4.00	-6.49	33.33	44.00
Millet	Ségou, Wholesale, XOF/100 KG*	30,000.00	-20.00	-16.67	25.00	57.89
Millet	Sikasso, Wholesale, XOF/100 KG*	30,000.00	-25.00	-20.00	-29.41	20.00
Millet	Tombouctou, Wholesale, XOF/100 KG*	40,000.00	-8.05	-11.11	14.29	14.29
Rice	Bamako, Wholesale, XOF/100 KG*	41,000.00	0.00	-8.89	-8.89	-10.87
Rice	Gao, Wholesale, XOF/100 KG*	42,500.00	-1.16	-9.57	-15.00	-10.53
Rice	Kayes, Wholesale, XOF/100 KG*	40,000.00	-9.09	-14.89	-20.00	-23.08
Rice	Mopti, Wholesale, XOF/100 KG*	40,000.00	0.00	-15.79	-15.79	-11.11
Rice	Ségou, Wholesale, XOF/100 KG*	33,000.00	-17.50	-26.67	-23.26	-30.53
Rice	Sikasso, Wholesale, XOF/100 KG*	40,000.00	0.00	-11.11	-11.11	-15.79
Rice	Tombouctou, Wholesale, XOF/100 KG*	40,000.00	-10.11	-13.04	-20.00	-20.00
Rice (imported)	Bamako,Wholesale, XOF/100 KG*	37,000.00	-5.13	0.00	0.00	-13.95
Rice (imported)	Gao, Wholesale, XOF/100 KG*	40,500.00	10.96	-5.81	-3.57	-10.00
Rice (imported)	Kayes, Wholesale, XOF/100 KG*	44,000.00	22.22	27.54	27.54	12.82
Rice (imported)	Mopti, Wholesale, XOF/100 KG*	39,000.00	0.00	0.00	-2.50	-11.36
Rice (imported)	Sikasso, Wholesale, XOF/100 KG*	40,000.00	0.00	-9.09	-4.76	60.00
Sorghum	Bamako, Wholesale, XOF/100 KG*	32,500.00	-2.99	-7.14	44.44	62.50
Sorghum	Gao, Wholesale, XOF/100 KG*	34,000.00	-24.44		-15.00	-2.86
Sorghum	Kayes, Wholesale, XOF/100 KG*	35,000.00	-5.41	12.90	6.06	45.83
Sorghum	Mopti, Wholesale, XOF/100 KG*	33,000.00	0.00	-12.00	57.14	37.50
Sorghum	Ségou, Wholesale, XOF/100 KG*	40,000.00	40.35	11.11	90.48	100.00
Sorghum	Sikasso, Wholesale, XOF/100 KG*	40,000.00	37.93	33.33	14.29	90.48
Sorghum	Tombouctou, Wholesale, XOF/100 KG*	40,000.00	-9.09	-11.11	14.29	21.21

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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 prices of food in the selected markets of Niger in June are higher than 1-6 months ago, but mostly lower than a year ago (table 21). Maize prices are, however, stable/lower in Katako than the past 3-6 months, while sorghum prices are lower/stable in Bonkaney compared to the past 1-3 months. Conflicts and insecurity as well as the lean season are driving higher prices.[51] Prices are expected to reduce in the next 3 months but increase thereafter.

Table 21: Changes in prices in Niger[52]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year	Next 3 Months*	Next 6 Months*
Maize	Abalak, Retail, XOF/KG	361.00	8.41	13.70	8.41	-12.59	-17.04	-0.74
Maize	Bonkaney, Retail, XOF/KG	263.00	12.88	13.85	4.37	-8.68	-10.46	9.41
Maize	Goure, Retail, XOF/KG	400.00	14.61	18.34	25.39	9.59	-22.98	-2.50
Maize	Katako, Retail, XOF/KG	252.00	7.23	0.00	-0.40	-19.23	1.70	9.41
Millet	Abalak, Retail, XOF/KG	358.00	1.99	3.92	10.49	-14.15	-16.98	0.82
Millet	Bonkaney, Retail, XOF/KG	302.00	4.86	5.23	2.03	-8.48	0.59	2.86
Millet	Goure, Retail, XOF/KG	360.00	3.15	22.03	18.81	1.69	-15.57	2.87
Millet	Katako, Retail, XOF/KG	302.00	4.14	0.33	1.34	-10.39	-2.52	7.42
Sorghum	Abalak, Retail, XOF/KG	332.00	3.43	13.50	22.51	-2.06	-8.41	4.79
Sorghum	Bonkaney, Retail, XOF/KG	297.00	0.00	-0.34	1.02	-4.81	-6.94	-3.36
Sorghum	Goure, Retail, XOF/KG	329.00	0.61	24.62	20.96	7.52	-18.72	6.89
Sorghum	Katako, Retail, XOF/KG	298.00	-0.67	1.71	-0.67	-6.88	-9.67	2.34

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

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

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

Nigeria

Overall, the prices of food commodities being monitored in Nigeria are higher than all comparable periods (table 22). Despite this, millet prices have remained unchanged in Ibadan and Lagos compared the previous month, while rice prices declined in Ibadan and Kaura Namoda. In addition, the AFEX website show a decline in the prices of most major cereals such as maize, paddy rice, and sesame on the open market between the third and fourth week of July.[53] Despite this seemingly reduced grain prices, the Nigerian government has declared a state of emergency on food based on rising food prices.[54] The compounded impacts of below-average 2022 harvest, the lean season, a growing macroeconomic crisis, such as a 200% increase in fuel prices due to the removal of the petrol subsidy and the devaluation of the Nigerian Naira (NGN), and protracted conflict are driving up food prices in Nigeria.[55] Per the available data, urea and NPK fertilizer prices have seen a substantial reduction. However, recent reports show that NPK fertilizer prices are rising due to strong demand.[56]

Table 22: Changes in prices in Nigeria[57]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Maize (white)	Giwa, NGN/KG**	253.75	5.73	62.40	23.03	43.36
Maize (white)	Ibadan, NGN/KG**	277.50	2.78	3.93	16.84	9.94
Maize (white)	Kano, NGN/KG**	278.10	16.36	31.69	24.05	22.51
Maize (white)	Kaura Namoda, NGN/KG**	268.10	4.73	30.11	18.21	20.51
Maize (white)	Lagos, NGN/KG**	269.50	2.86	9.00	11.94	3.89
Maize (white)	Maiduguri, NGN/KG**	262.50	5.00	28.05	28.05	32.31
Millet	Giwa, NGN/KG**	312.50	11.61	48.81	26.26	30.75
Millet	Ibadan, NGN/KG**	316.00	0.00	8.03	8.22	15.50
Millet	Kano, NGN/KG**	286.85	2.81	14.28	12.80	16.99
Millet	Kaura Namoda, NGN/KG**	278.30	6.38	27.46	10.94	27.10
Millet	Lagos, NGN/KG**	316.00	0.00	8.68	13.06	13.83
Millet	Maiduguri, NGN/KG**	255.00	6.25	17.24	12.09	9.91
NPK 15-15-15	National, USD/50KG*	34.49	-31.03	-39.87	-39.73	-44.04
NPK 20-10-10	National, USD/50KG*	31.09	-30.15	-38.65	-41.10	-44.88
Rice (imported)	Giwa, NGN/KG**	780.00	2.63	1.30	1.96	37.32
Rice (imported)	Ibadan, NGN/KG**	640.50	-0.23	-2.06	-12.68	12.61
Rice (imported)	Kaura Namoda, NGN/KG**	684.15	-0.27	5.94	2.26	30.46
Rice (imported)	Lagos, NGN/KG**	812.00	3.57	-3.45	-6.45	43.26
Rice (imported)	Maiduguri, NGN/KG**	825.00	3.13	0.61	-1.79	39.93
Rice (milled)	Giwa, NGN/KG**	1,400.00	4.48	12.90	29.03	45.83
Rice (milled)	Ibadan, NGN/KG**	1,275.00	-2.22	-2.12		33.65
Rice (milled)	Kano, NGN/KG**	674.00	12.52	18.45	15.41	36.16
Rice (milled)	Kaura Namoda, NGN/KG**	1,213.00	5.30	7.50	15.77	35.20
Rice (milled)	Maiduguri, NGN/KG**	1,282.50	0.20	10.56	19.30	38.80
Sorghum (white)	Giwa, NGN/KG**	241.25	9.66	55.65	22.15	35.53
Sorghum (white)	Ibadan, NGN/KG**	287.50	2.68	2.68	2.68	1.23
Sorghum (white)	Kano, NGN/KG**	239.35	-0.15	20.07	4.44	2.55
Sorghum (white)	Kaura Namoda, NGN/KG**	273.75	5.86	23.98	12.38	17.55
Sorghum (white)	Lagos, NGN/KG**	302.00	0.67	9.52	6.71	11.44
Sorghum (white)	Maiduguri, NGN/KG**	232.50	10.71	16.98	16.25	16.25
Urea	National, USD/50KG*	24.48	-26.35	-40.35	-46.92	-47.71

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

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

[53] https://africaexchange.com/reports/weekly/21st-july-2023
[54] https://www.bbc.com/news/world-africa-66199237
[55] https://fews.net/west-africa/nigeria
[56] https://africafertilizerwatch.org/#/en
[57] Author's construction based on data from FAO (2023)

Togo

Changes in the prices of food commodities show mixed trends (table 23). Generally, cassava and maize prices show lower trends in all monitored markets, but maize prices in Kara, remain an exception. Meanwhile, rice and sorghum prices are generally high than the past 3-12 months. Compared to May, cassava prices in June remain mostly stable, maize prices are generally stable/declined in most markets except in Cinkasse and Kara, while rice and sorghum prices are mostly stable except in Kara, Korbongou, and Lomé. Fertilizer prices remain generally unchanged as the government has ensured an adequate importation of the required fertilizers.[58]

Table 23: Changes in prices in Togo[59]

Crop	Market	Last Price	1 Month	3 Months	6 Months	1 Year
Cassava (gari)	Amegnran, XOF/Kg	275.00	0.00	-8.33	-8.33	-8.33
Cassava (gari)	Anie, XOF/Kg	290.00	-3.33	-4.61	-3.33	-13.43
Cassava (gari)	Cinkassé, XOF/Kg	430.00	0.00	1.18	-0.92	28.36
Cassava (gari)	Kara, XOF/Kg	425.00	-1.16	1.19	3.66	7.59
Cassava (gari)	Korbongou, XOF/Kg	425.00	0.00	-1.16	-2.07	-9.57
Cassava (gari)	Lomé, XOF/Kg	400.00	0.00	0.00	-8.05	-3.61
Maize (white)	Amegnran, XOF/Kg	250.00	0.00	-3.85	8.70	-15.25
Maize (white)	Anie, XOF/Kg	240.00	-4.00	-2.04	13.74	-5.88
Maize (white)	Cinkassé, XOF/Kg	260.00	1.96	0.00	1.56	0.00
Maize (white)	Kara, XOF/Kg	340.00	25.93	26.39	42.86	25.93
Maize (white)	Korbongou, XOF/Kg	260.00	0.00	0.00	1.96	-1.89
Maize (white)	Lomé, XOF/Kg	270.00	0.00	0.37	11.57	-10.00
Rice (imported)	Amegnran, XOF/Kg	550.00	0.00	-1.79	1.85	-1.79
Rice (imported)	Anie, XOF/Kg	460.00	0.00	0.00	0.00	0.00
Rice (imported)	Cinkassé, XOF/Kg	465.00	0.00	1.09	1.09	0.00
Rice (imported)	Kara, XOF/Kg	490.00	6.52	6.52	6.52	5.38
Rice (imported)	Korbongou, XOF/Kg	550.00	10.00	10.00	14.58	11.11
Rice (imported)	Lomé, XOF/Kg	490.00	1.03	6.52	6.52	6.52
Sorghum	Anie, XOF/Kg	300.00	0.00	3.45	13.21	7.14
Sorghum	Cinkassé, XOF/Kg	300.00	0.00	3.45	11.11	11.11
Sorghum	Kara, XOF/Kg	340.00	13.33	6.25	14.09	10.03
Sorghum	Korbongou, XOF/Kg	300.00	0.00	3.45	7.14	3.45
Sorghum	Lomé, XOF/Kg	360.00	0.00	7.46	5.88	12.50

Note: Last price is for June 2023, *July, **May, ***April, ****March, and *****February

= 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 **Burkina Faso**, the ongoing agricultural campaign has been affected by rains recorded during the months of May and June in the southern and western production areas, which were irregular and insufficient and did not allow large-scale plantings. In **Mali**, the progression of the agricultural campaign is average due to the continuation of the rains, although poorly distributed over time and which delayed the sowing of crops in the agricultural areas of the south of the country. In **Nigeria**, the main season cultivation is underway across the country, with localized disruptions due to flooding in the central and southern states, dry spells and conflict in many northern states, and nationally above-average input prices in July. In **Niger**, the rainy season got off to a good start, with good rainfall enabling planting in farming villages.

[58] https://africafertilizerwatch.org/#/en
[59] Author's construction based on data from FAO (2022)

Food Trade Updates

Continental

The month of June 2023 has seen several 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.

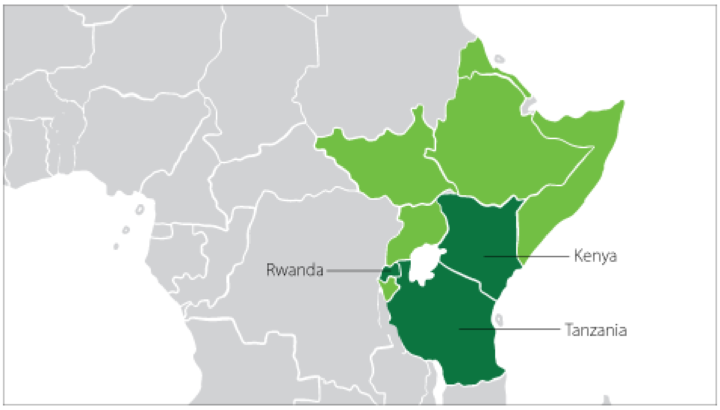
East Africa

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 (EAC) has unveiled an online tool for measuring the performance of the 22 One Stop Border Posts (OSBPs) across the region.

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 July 2023



RWANDA

- Rwanda and the Republic of Congo on July 22 signed an agreement to fast-track trade economic cooperation under the African Continental Free Trade Area (AfCFTA).

TANZANIA

- Tanzania has identified imported goods to be taxed under the East African Community (EAC) Common External Tariff (CET) in the current fiscal year. These include sugar, cooking oil, clothes and footwear, and buses for transportation. The country's tariff rates will slightly differ from those that will be applied by fellow partner states in the seven-nation bloc.
- Tanzania's restrictions on cereal exports to Kenya and Uganda have seen the prices of maize dip in the country, prompting farmers to petition their Members of Parliament to press the government to liberalize the trade.

KENYA

- Fish traders are set to benefit from a recent agreement between COMESA and the government aimed at improving their participation in cross-border trade within the Eastern Africa Region. The agreement provides technical assistance to enhance market access, and expansion of value chains through the RECAMP (Regional Enterprise Competitiveness and Access to Markets Programme).
- Edible oil manufacturers have faulted a move to reduce tariffs on finished oils coming from outside the East Africa from 35 per cent to 25 per cent, saying it will create an unlevel playing field for businesses that have invested heavily in the sector.

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 July 2023

MOZAMBIQUE

- Mozambique and the United Arab Emirates (UAE) are negotiating a Comprehensive Economic Partnership Agreement (CEPA), creating a free trade area for goods, services and investment.

ZIMBABWE

- The Agricultural Marketing Authority (AMA) is negotiating with its Botswana counterpart to establish an export corridor that will see local horticultural players export their products to Botswana.

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.

Figure 8: West Africa Cross Border Trade Updates June 2023[60]

NIGER

- The Economic Community of West African States (ECOWAS) have imposed sanctions including border closures on Niger which is causing food prices to rise steeply.

[60] 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/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