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The monthly Food Security Monitor is a critical tool for stakeholders across the African agricultural landscape. This report equips policymakers, practitioners and the wider community with vital insights to navigate challenges, prioritise interventions, and ultimately build a more food-secure future for all. This 49th edition overviews the food security situation and market prices across East, South, and West Africa.

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Summary

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

Food Security Updates

Food insecurity remains a concern in the southern Africa region, particularly in Zambia, Malawi, Mozambique and Zimbabwe. So far, most of the affected countries are taking several steps to meet the expected shortfall as the region enters the lean season. For instance, Zambia has secured an arrangement with its neighbour, Tanzania, to procure 650,000 Mt of maize, despite scepticism by the private sector in terms of logistics. So far, the Government of Malawi has also mobilized nearly 100 million USD equivalent to about 161,576 MT maize out of the required 261,574 MT needed to meet the lean season requirements. As part of the drought mitigation plan, the Government of Zimbabwe has issued 651 import permits to private companies to procure at least 3.2 million tonnes of maize. Despite these efforts, drought and conflict affected parts of the region are faced with Stressed (IPC Phase 2) to Crisis (IPC Phase 3) conditions, further driven by the early onset of the lean season.

In **Eastern Africa**, some parts of South Sudan face severe food insecurity situation, with a risk of Famine (IPC Phase 5), while the rest of the country faces Crisis (IPC Phase 3) and Emergency (IPC Phase 4) conditions. Food insecurity remains a concern in Ethiopia with much of the country experiencing IPC 3 and 4 conditions. Otherwise, most parts of the region have seen improvement in the food security situation due to increased food supply from previous harvests. In **West Africa**, Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) conditions are projected in parts of Burkina Faso and Mali due to heightened insecurity and conflicts. Apart from these, most of the region is facing Crisis (IPC Phase 3) conditions.

Food Commodity Prices Updates

Maize prices in the **Eastern Africa** region have started increasing when compared to the past 1-3 months, except in Rwanda, whose prices have remained below the past 1-12 months. Ethiopia has the most expensive maize in the region mainly due to the continuous depreciation of the national currency, poor harvests caused by dry weather conditions and conflict related farming and trade disruptions. On the other hand, South Sudan is experiencing the most rapid rise in the prices of maize in the region. In **Southern Africa**, the prices of grains in respective local currencies remain high in most countries compared to the past 1-12 months due to macroeconomic challenges, the aftermath of Cyclone Freddy and the El Nino-induced drought. However, the ongoing efforts to import maize from other countries such as South Africa, Tanzania and Uganda may help stabilise retail prices during the winter season. In **West Africa**, the overall local prices of maize grain in the two West African countries show higher trends compared to the past 3-12 months, except for a few markets in Togo whose current price is stable or had declined compared to the past 12 months. The changes in millet and rice prices also show higher trends, except Lagos, where there is significant decline in price compared to the past 1-12 months. All other markets in Niger and Nigeria have recorded significantly higher prices of rice over the same periods, ranging from 4.29% in Agadez to 323.31% in Ibadan. The high cost-of-living crisis, due to high inflation rates, currency depreciation, and elevated fuel prices, continued to push up staple crop prices.

Food Trade Updates

- The COMESA-EAC-SADC Tripartite Free Trade Area (TFTA) agreement commenced on July 25, 2024, with 14 out of the 29 member states endorsing it, following the attainment of the required 14-member threshold. Malawi, Lesotho and Angola are the latest member states to ratify the agreement making it 14 countries.
- Following the commencement of the COMESA-SADC-EAC Tripartite agreement, a US$6.5 billion port and rail project involving Zimbabwe, Mozambique and Botswana has also commenced. The project is expected to improve trade infrastructure and increase trade in the tripartite region.
- The Government of Zimbabwe has issued import permits to 651 firms to import 3.2 million tonnes of maize as part of its response measures to mitigate the food supply shortages driven by the El Nino induced drought.
- Nigeria has launched its first shipment of exports under the Guided Trade Initiative (GTI) to five African countries, namely Cameroon, Kenya, Algeria, Uganda, and Egypt. The exports include bags, ceramics, textiles, cables, smart cards, Clinkers Black soap, native starch and Shea butter.

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 year. **Figure 1** displays the prevalence of IFC in July across 17 countries selected from Eastern, Southern and Western Africa. During this month, the countries that are food insecurity hotspots (defined as countries where over 50% of the total population has IFC) include Burkina Faso (56.6%), Mali (69.1%), Niger (82.6%), and Nigeria (51.5%). The number of people with IFC in July remained unchanged from June in most countries except Ghana, Nigeria and Uganda, where it rose by 5.77%, 3.98%, and 7.5% respectively, and in Zimbabwe where it decreased by 5.45%. Compared to a year ago, however, most countries have experienced surges in the number of people with IFC except in Mozambique, Rwanda, South Sudan, Uganda and Zambia where the current is lower.

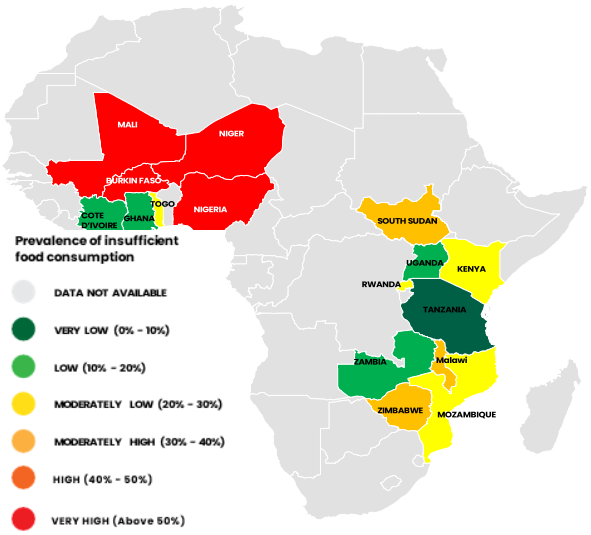
The changes in the national average prices of maize and imported rice, on the other hand, show mixed trends compared to the past six months. However, compared to a year ago, the prices of maize in Ethiopia, Kenya, Rwanda, Tanzania, and Uganda were lower, which depicts the typical seasonal increase in maize supply in these East African countries. Conversely, the prices of imported rice in the West African countries of Cote d'Ivoire, Burkina Faso, Mali and Niger were higher than they were in the past six months.

Table 1: Insufficient Food Consumption and Commodities Price Changes

Country	Change (%) in people with insufficient food consumption from last 1 Month		Change (%) in people with insufficient food consumption from last 1 year		Commodity Price Changes (%) in the last 6 months		Commodity Price Changes (%) in the last 1 year	
Burkina Faso	0.00	○	3.70	↑	6.32	↑	11.03	↑
Cote d'Ivoire	0.00	○	41.67	↑	0.40	↑	8.19	↑
Ethiopia					1.85	↑	-3.88	↓
Ghana	5.77	↑	10.00	↑				
Kenya	0.00	○	12.40	↑	-41.42	↓	-47.43	↓
Malawi	0.00	○	51.11	↑	-12.61	↓	32.44	↑
Mali*	0.00	○	3.94	↑	3.45	↑	12.17	↑
Mozambique	0.00	○	-8.43	↓	-0.15	↓	2.73	↑
Niger	0.00	○	25.88	↑	14.87	↑	56.31	↑
Nigeria	3.98	↑	39.01	↑	175.86	↑	56.97	↑
Rwanda	0.00	○	-16.13	↓	-26.57	↓	-40.78	↓
South Sudan	0.00	○	-7.69	↓	261.42	↑	222.64	↑
Tanzania	0.00	○	4.00	↑	-20.00	↓	-41.35	↓
Togo	0.00	○	26.67	↑	16.85	↑	0.09	↑
Uganda	7.50	↑	-13.13	↓	-16.06	↓	-46.75	↓
Zambia	0.00	○	-23.26	↓	10.24	↑	67.57	↑
Zimbabwe	-5.45	↓	30.00	↑	0.57	↑	0.56	↑

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

Figure 1: Hunger Hotspots Snapshot, July 2024



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

[2] Maize is the main commodity tracked on this dashboard, except in Burkina Faso, Cote d'Ivoire, Mali and Niger where we tracked imported rice. The price changes presented here are average price changes over a number of selected markets, which implies that prices may be higher or lower in certain markets.

Global Market Update

The FAO Food Price Index (FFPI) (**Figure 2**) stood at 120.8 points in July 2024, marginally below its revised figure for June, driven by decrease in the price index for cereals outweighed increases in the price indices for vegetable oil, meat products and sugar, while the dairy index was almost unchanged.[3] As of 29th July 2024, the International Grain Council's (IGC) Grain and Oil Index (GOI) 2.43% and 19.4% lower than it was the same time a month and a year ago respectively (**Table 2**). This is supported by declines in all sub-indices except maize compared to last month and rice compared to a year ago, which both were up by 6.06% and 8.14% respectively. Seasonal availability of cereals from ongoing harvests in the northern hemisphere and in Argentina and Brazil are supporting downward pressure on international cereal prices.[4]

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

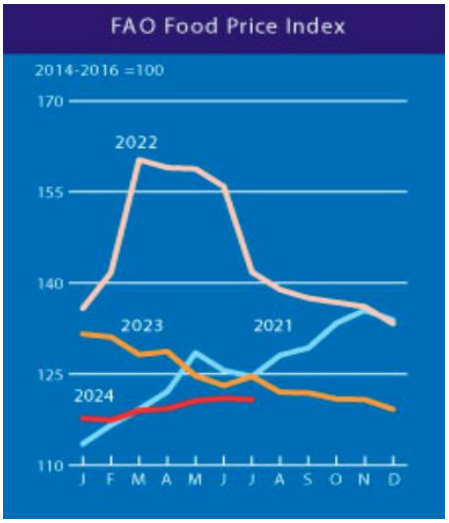


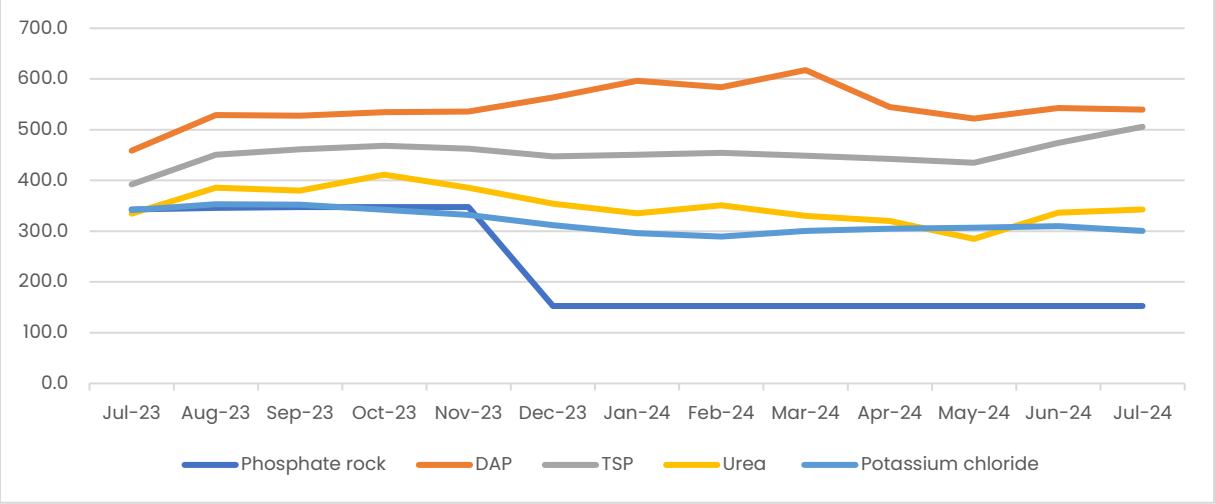
Table 2: IGC GOI Commodity Price Indices

Jan 2000 = 100	29-July	% Change 1M	% Change 1Y
GOI	222.67	*-2.43*	*-19.40*
Wheat	198.13	*-2.64*	*-20.69*
Maize	202.54	*6.06*	*-16.67*
Rice	246.82	*-1.78*	*8.14*
Soyabeans	211.52	*-5.51*	*-25.46*
Barley	210.98	*-1.20*	*-9.65*

Global Fertiliser Prices

The prices of monitored fertiliser types show mixed trends over the period (**Figure 3**). Compared to June 2024, DAP and Potassium chloride prices in July dropped slightly by 0.7% and 3% respectively, while TSP and urea climbed up by 6.8% and 1.9% respectively. Compared to July 2023, Phosphate rock saw the most dip by 55%, followed by Potassium by 11.9%. On the other hand, DAP, TSP and urea went up by 17.6%, 28.9% and 2.4% respectively.

Figure 3: Global Fertiliser Prices ($/mt)



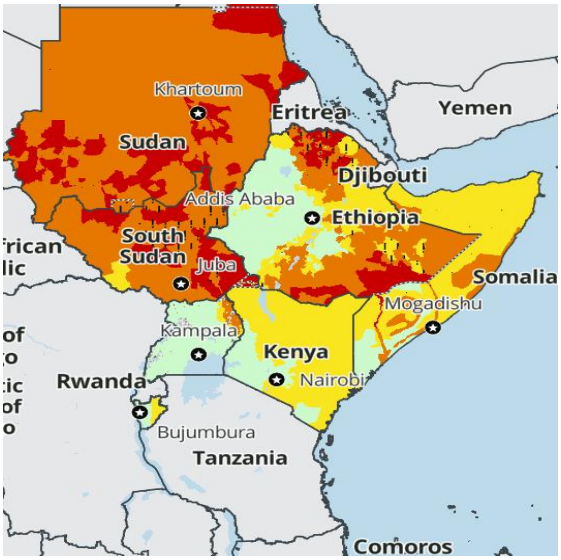
Source: Author's construction based on World Bank data[5]

[3] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[4] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[5] https://www.dtnpf.com/agriculture/web/ag/crops/article/2024/06/26/anhydrous-uan32-urea-lead-retail

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, June - September 2024



In **Ethiopia,** generally, the severity of acute food insecurity in much of Ethiopia Is reducing due to gradual recovery from drought and conflicts and supported by sustained humanitarian assistance.[6] Nonetheless, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are expected from June to September in the northern conflict and drought-affected areas and in Afar as the lean season peaks. However, the food security situation is expected to improve with the *meher* harvest in October. In **Kenya,** Crisis (IPC Phase 3) outcomes are expected to persist in the riverine areas of Garissa and Tana River counties, while Stressed (IPC Phase 2) outcomes are expected across pastoral and marginal agricultural areas through January. This is due to a combination of floods from the long rain (March-May) and recovery from the droughts in the pastoral and marginal agricultural areas. **South Sudan** faces a severe food insecurity situation, with risk of Famine (IPC Phase 5) in parts of Pibor of Greater Pibor Administrative Area (GPAA), Duk of Jonglei and among those displaced and sheltering in areas of transit such as Rubkona of Unity, Renk of Upper Nile and Aweil East of Northern Bahr El Ghazal.[7] However, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persist in Unity, Upper Nile, Jonglei, Greater Pibor Administrative Area (GPAA), Abyei Administrative Area (Abyei), Warrap, Northern Bahr El Ghazal, Lakes and parts of Eastern Equatoria, as well as among returnees and the displaced.[8] The situation is driven by several factors including high and rising staple food prices, poor macroeconomic conditions, high returnee burden and continued conflict and insecurity.[9] FEWS NET projects that 65-70% of the population (8-9 million people) will require food aid at the peak of the lean season (July-September).[10] In **Uganda,** Crisis (IPC Phase 3) outcomes are expected in most refugee settlements and in drought-affected areas of Karamoja, with some households in Emergency (IPC Phase 4) ahead of the August harvest.[11]

Prevalence of insufficient food consumption

As of 29th July 2024, the number of people across five selected East African countries (see **Table 3**) who did not have sufficient food for consumption was 33.6 million, a 600,000 increment over June 2024. This signifies a deterioration in food insecurity across these select countries, driven mainly by Uganda, which has experienced a 7.5% increase. However, the current level of food insecurity across the region is lower than what was recorded in July 2023 (34 million) and July 2022 (41.9 million). Compared to a year ago, the prevalence of insufficient food consumption had declined in Rwanda, South Sudan and Uganda but increased in Kenya and Tanzania.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (July 2024)[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 (%)
Kenya	51.40	13.60	13.60	26.46	0.00	12.40	11.48
Rwanda	12.30	2.60	2.60	21.14	0.00	-16.13	-3.70
South Sudan	11.00	3.60	3.60	32.73	0.00	-7.69	-44.62
Tanzania	56.30	5.20	5.20	9.24	0.00	4.00	-3.70
Uganda	42.70	8.60	8.00	20.14	7.50	-13.13	-43.05

**Current month and **Previous month*

[6] https://fews.net/east-africa/ethiopia
[7] https://fews.net/east-africa/south-sudan
[8] https://fews.net/east-africa/south-sudan
[9] https://fews.net/east-africa/south-sudan
[10] https://fews.net/east-africa/south-sudan
[11] https://fews.net/east-africa/uganda
[12] Author's construction based on WFP HungerMap

= 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]

	Conflicts	Conflicts and insecurity persist particularly in South Sudan and Ethiopia preventing price recovery from high levels despite harvests.
	Seasonal Dynamics	The October-December season, including Tanzania's main season, harvests in the region are improving supplies in most markets, resulting in lower prices across the region. Above average rains in some parts of the region may have affected the easy movement of crops impacting prices.
	Macroeconomic Shocks	Poor macroeconomic conditions, an influx of returned refugees from Sudan, trade disruptions and localised poor harvests have particularly sustained higher prices in South Sudan.

Maize

Figure 5: National average price spreads for Maize across select East African Countries[14]

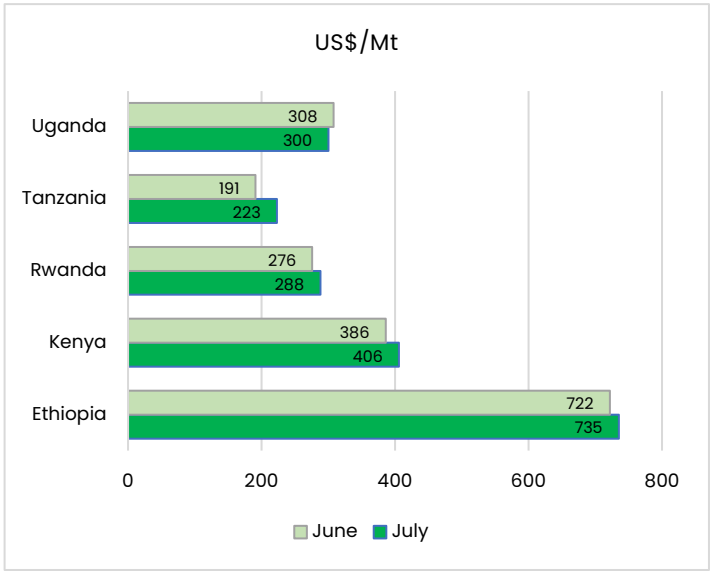


Figure 5 presents the national average price spreads for maize across select East African Countries, showing Tanzania's maize price being the lowest in the region selling at US$223/ton in retail, 20 percent higher than the previous month's price, which could be attributed to the increase in demand of maize by neighbouring Southern Africa countries. Maize in Ethiopia continued fetching the highest selling prices at US$735/ton in the region, mainly due to the continuous depreciation of the national currency, poor harvests caused by dry weather conditions and conflict related trade disruptions. **Table 4** shows changes in the prices of maize across the region, which generally show a tremendous increasing trend in prices in South Sudan over the past 1-12 months, ranging from 72.61% to 261.42%, demonstrating the dire need for the food crop amidst poor harvests. Rwanda and Uganda have recorded decreasing price trends, with the former recording decreasing prices over the past 1-12 months ranging from 3.34% to 40.78%, while the latter recorded 16.06% and 46.75% In the past six months and twelve months respectively. This demonstrates the positive impact of good harvests on price movement.

Table 4: Percentage Changes in Maize Prices in East Africa[15]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg*	4,229.17	1.93	7.20	1.85	-3.88
Kenya	Maize	National Average, Retail, KES/KG*	52.37	5.70	5.09	-41.42	-47.43
Rwanda	Maize	National Average, Retail, RWF/Kg*	346.93	-3.34	-5.05	-26.57	-40.78
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	2,394.24	72.61	159.39	261.42	222.64
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG*	60,000.00	20.00	20.00	-20.00	-41.35
Uganda	Maize (white)	National Average, Retail, UGX/Kg	1,111.71	-2.21	0.55	-16.06	-46.75

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

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

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

[13] Fewsnet, 2024

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

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

Rice

Figure 6: National average price spreads for Rice across select East African Countries[16]

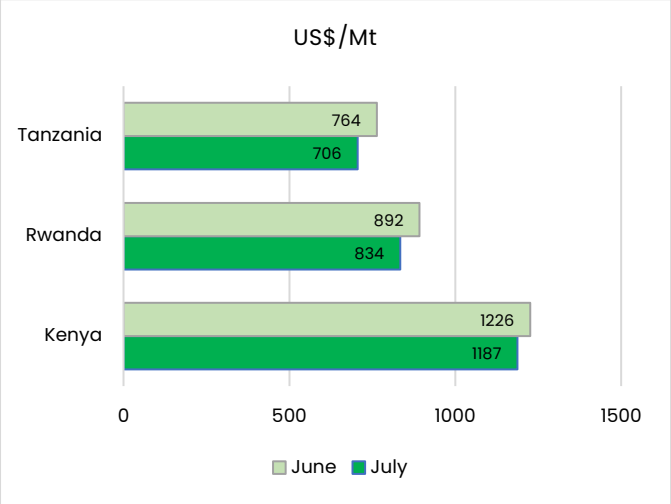


Figure 6 presents the price spread between 3 East African countries where rice is considered one of the major staple foods. The figure shows a general decrease in the retail price of rice, which is attributable to the above-average harvests in the region. However, the price of rice is highest in Kenya, at US$1,187/ton, compared to Tanzania and Rwanda, with the former having the lowest price at US$706/ton, marking a decrease of 7.6% from the previous month. From **Table 5**, rice prices in local currencies of the three monitored East African countries generally show a decrease compared to the previous month, with Tanzania recording 5% decline compared to Kenya (2.72%) and Rwanda (0.96%). Compared to the other countries, Tanzania's rice prices show a general decrease over the past 1-12 months, ranging from 5% to 25%, contrary to Kenya whose prices compared to the last 3-12 months remain higher between 0.08% and 16.07%.

Table 5: Percentage Changes in Rice prices in East Africa[17]

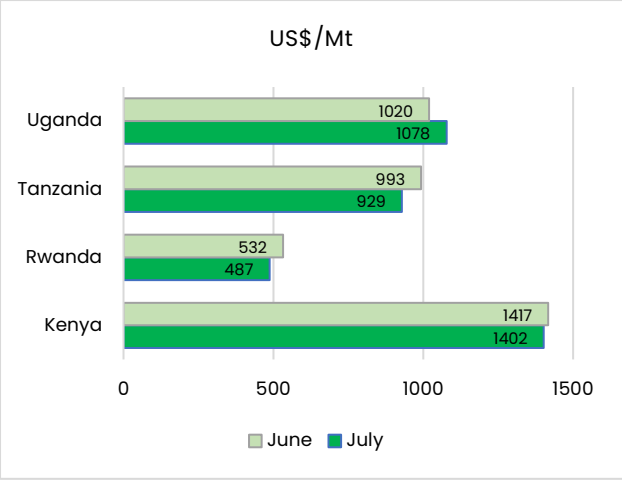
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG*	153.09	-2.72 ↘	7.94 ↑	16.07 ⊗	0.08 ▲
Rwanda	Rice	National Average, Retail, RWF/Kg*	1,148.61	-0.96 ↘	1.72 ▲	-4.28 ↘	14.11 ↑
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG*	190,000.00	-5.00	-9.52 ↓	-20.00 ↓	-25.08 ↓

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

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

Beans

Figure 7: National average price spreads for Beans across select East African Countries[18]



Kenya's beans (Yellow-Green) price, as shown in **Figure 7**, fetches the highest price in the region at US$1,402/Mt compared to the lowest recorded retail price at US$487/Mt in Rwanda. Beans are considered an important food crop in Kenya; however, low rainfall, poor crop management, low soil fertility, and the use of inappropriate seed varieties can be regarded as reasons limiting the country's ability to produce enough to meet its demand. As a result, prices tend to be high. However, the ongoing seasonal harvests have contributed to a slight price decline of 1.1% from the previous month. The changes in prices, as shown in **Table 6**, demonstrate price decrease in local currency over the past 1 month in Kenya, Rwanda and Tanzania, with the exception of Uganda, which has recorded price increases over the past 1, 3 and 6 months by 6.09%, 8.95% and 9.08% respectively, which may be attributed to drought that has impacted the **bimodal** northwestern areas of the country characterised by considerably below-average March to May (MAM) rainfall[19].

[16] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[17] Author's construction based on 1) FAO data for Rwanda, 2) national MIS Kenya & Tanzania
[18] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[19] https://reliefweb.int/report/uganda/uganda-key-message-update-crop-production-shortfalls-likely-bimodal-uganda-following-severe-dryness-may-2024

Table 6: Percentage Changes in Beans Prices in East Africa[20]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG*	180.86	-0.55	10.60	11.49	-8.09
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG*	134.48	-1.59	-28.93	10.10	-9.61
Rwanda	Beans	National Average, Retail, RWF/Kg*	635.90	-8.08	1.20	16.71	-41.61
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG*	250,000.00	-3.85	0.00	0.00	-6.79
Uganda	Beans	National Average, Retail, UGX/Kg	3,991.71	6.09	8.95	9.08	-14.23

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

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

Wheat Prices

Overall, wheat prices (**Table 7**) across the two selected countries in the Eastern Africa region have been on an upward trend over the past 1-12 months, with Kenya recording significant increase ranging from 5.53% to 59.77% during this period. Likewise, Ethiopia's current prices in local currency remain higher than the past 1-12 months, with the current price particularly 31.91% higher than 12 months ago. However, Ethiopia's increased domestic wheat consumption, conflicts and poor macroeconomic conditions continue to impact wheat prices.

Table 7: Percentage Changes in Wheat Prices in East Africa[21]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg*	7,214.83	1.45	2.97	1.12	31.91
Kenya	Wheat	National Average, Retail, KES/KG*	95.86	5.53	17.89	59.77	15.63

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

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

Fertiliser Prices

Fertiliser prices have generally declined in select East African countries (**Table 8**). In Kenya, the price of all three types of fertilisers (CAN, DAP, NPK) spiked up in the past month ranging from 17.26% (NPK) to 65.31% (CAN), a period characterised by the nationwide protests in Kenya, which most likely made it difficult to access imported fertilisers pending the on-set of the proposed 2024 Financial Bill. In Rwanda, all fertiliser types recorded a modest price decrease ranging from 0.15% to 11.91% over the past 1-12 months.

Table 8: Percentage Changes in Fertiliser prices in East Africa[22]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG*	92.50	65.31	-13.30	-33.26	-6.88
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG*	131.06	55.59	-43.64	3.47	12.04
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG*	104.32	17.26	-10.65	0.98	9.66
Rwanda	DAP	National Average USD/50KG*	47.78	-0.15	-2.27	-4.00	-11.52
Rwanda	NPK 17-17-17	National Average USD/50KG*	48.10	-0.58	-3.67	-4.41	-11.92
Rwanda	Urea	National Average USD/50KG*	36.83	-0.24	-2.36	-4.09	-11.51

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

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

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

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

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

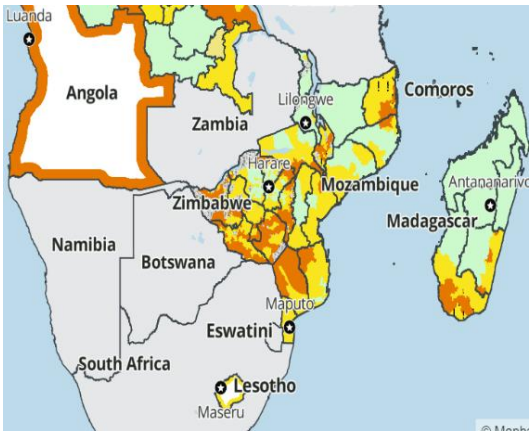
Seasonal Monitor and Cropping Conditions

The East Africa region is projected to experience La Niña conditions during the second half of 2024, which would likely bring below-average rainfall to the eastern Horn of Africa.[23] The greatest impacts are expected in central and southern Somalia, southern Ethiopia, and the arid and semi-arid lands of Kenya. Overall, in **Ethiopia**, forecast models show an increasing likelihood of a below-average October to December *deyr/hageya* rainy season, which affects crop outputs.[24] In **Kenya**, the long rain harvests are ongoing in parts of the country and are expected to improve households' access to food. In **South Sudan**, the current crop growth conditions are generally average-to-good across all livelihood zones due to improved main rainy season.[25]

Southern Africa Food Security Update

Food Security Outlook

Figure 8: Southern Africa Countries Food Security Outlook, June-September 2024



The food security situation in southern Africa remains a concern, particularly in Zambia, Malawi, Mozambique and Zimbabwe. So far, **Zambia** seems to have made the most visible efforts at securing 650,000 Mt of the shortfall from its neighbour, Tanzania. However, the private sector is sceptical about the reality of being able to transact this volume of trade between the two countries, given logistical constraints and the effective issuance of export permits by the Tanzanian Government.[26] For instance, some private sector players expressed doubts if the Tanzania Zambia Railway (TAZARA) could handle required volume given it currently can manage only 100,000 tonnes. In **Malawi**, Crisis (IPC Phase 3) conditions are projected in several districts of the Southern and Central regions through to January 2025 due to below-average crop production resulting from the El Nino driven severe dry spells, rapid depletion of food stocks from own-production, and the early onset of the lean season.[27] On the other hand, some districts in the central and northern regions are expected to face Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes due to increased access to food from their harvests and sales of cash crops. So far, the Government's resource mobilisation to meet a response requirement of 261,574 MT during the lean has resulted in nearly 100 million USD, which can procure about 161,576 MT maize equivalent, leaving a shortfall of about 40%.[28] In **Mozambique**, Crisis (IPC Phase 3) outcomes prevail across southern and central regions as well as conflict-affected areas of Cabo Delgado due to poor harvests underpinned by El Niño-induced drought and conflicts.[29] In **Zimbabwe**, Crisis (IPC Phase 3) outcomes persist across the country due to the below-average harvests and the early onset of the 2024/25 lean season.[30] As part of the drought mitigation plan, the Government of Zimbabwe has issued 651 import permits to private companies to procure at least 3.2 million tonnes of maize.[31]

Prevalence of Insufficient Food Consumption

As of 29th July 2024, the number of people who do not have sufficient food for consumption across four selected Southern African countries stands at 22.9 million people, a decline of 300,000 people from June 2024 (see **Table 9**). This is an Improvement in food insecurity situation across these select countries, driven mainly by Zimbabwe (5.45%). However, this number is above what was recorded in July 2023 (21.1 million) and July 2022 (19.1 million). Compared to

[23] Food Security and Nutrition Working Group report, 8 July 2024
[24] https://fews.net/east-africa/ethiopia
[25] https://fews.net/east-africa/south-sudan

[26] Further opinions on Zambia maize deal - Daily News
[27] https://fews.net/southern-africa/malawi
[28] https://fews.net/southern-africa/malawi
[29] https://fews.net/southern-africa/mozambique
[30] https://fews.net/southern-africa/zimbabwe
[31] https://www.herald.co.zw/651-firms-get-permits-to-import-3-2m-tonnes-maize/

a year ago, Malawi and Zimbabwe have registered an uptick in the number of people with insufficient food for consumption, while Mozambique and Zambia have a decline.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (July 2024)[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	6.80	6.80	37.57	0.00	51.11	78.95
Mozambique	29.50	7.60	7.60	25.76	0.00	-8.43	1.33
Zambia	17.40	3.30	3.30	18.97	0.00	-23.26	32.00
Zimbabwe	15.20	5.20	5.50	34.21	-5.45	30.00	-1.89

*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

	Seasonality Patterns	Most Southern African countries are experiencing seasonal declines in grain prices as the harvest season kicks in despite the expected below-average harvests.
	Weather Shocks	The aftermath of the cyclone, drought shocks and heavy flooding early in the planting season led to below-average harvests from the previous season, resulting in higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions caused by forex shortages, high food inflation and high debt repayments sustain higher food prices.

Maize

Figure 9: National average price spreads for maize across select Southern African Countries[33]

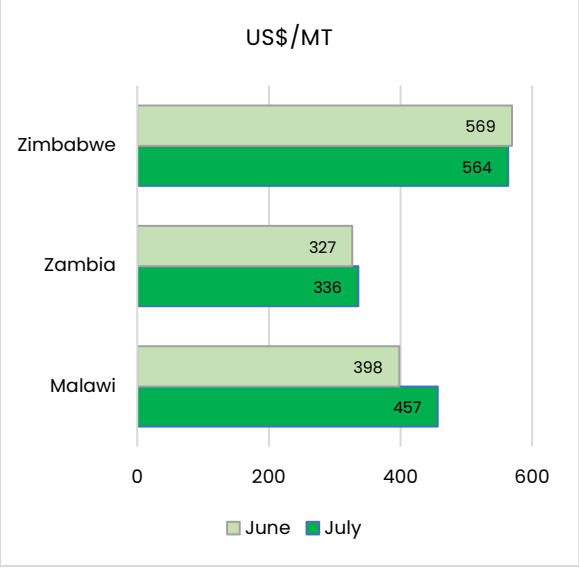


Figure 9 presents the price spread of maize in three Southern African countries Zambia, Malawi and Zimbabwe, with the latter recording the highest price at $564/Mt and the former recording the lowest at $336/Mt. Following the El Nino effect in Zimbabwe, the Government estimated a 72% decrease in maize harvest this season compared to last season and thus introduced duty waivers on imports of maize and genetically modified maize for feedstocks, whose milling and distribution will be strictly supervised by the Government. However, in **Table 10** below, the prices of maize in local currencies show a significant spike over the past 12 months, attributable to ongoing currency weakening, the aftermath of Cyclone Freddy and the El Nino-induced drought. However, the ongoing efforts by these countries to import maize from other countries in the region such as Tanzania, Uganda and South Africa (including GMOs for feeds to Zimbabwe), may help stabilise retail prices during the winter season.

[32] Author's construction based on HungerMap

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

Table 10: Percentage Changes in maize prices in Southern Africa[34]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Lilongwe, MWK/Kg**	900.00	0.00	0.00	19.21	176.92
Malawi	Maize	Liwonde, MWK/Kg*	849.14	14.27	7.90	-13.00	27.64
Malawi	Maize	Mzimba, MWK/Kg*	695.00	24.82	4.35	-7.02	40.19
Malawi	Maize	Mzuzu, MWK/Kg*	644.10	10.91	-6.38	-12.04	28.63
Malawi	Maize	National Average, MWK/Kg*	788.03	14.71	9.91	-12.61	32.44
Malawi	Maize	Nsanje, MWK/Kg*	896.61	9.48	23.50	-11.20	41.42
Zambia	Maize (white)	National Average, Retail, Kwacha/KG*	8.81	2.70	-2.64	10.24	67.57
Zimbabwe	Maize (white)	National Average, Retail, USD/Kg*	0.50	0.54	0.58	0.57	0.56

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

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

Rice

This month's price spread data for the two selected markets remained inconclusive and could not be reported. As reported in the 48 Edition of the Food Security Monitor, **Table 11** shows Lilongwe recorded significantly higher prices, ranging between 12.68% and 25% compared to the past 6-12 months, as opposed to the prices in Mzuzu showing a low decrease or increase. Similarly, Mozambique's national average price of imported rice is more stable or registered a low increase (0-5%) compared to the past 1-12 months, except in Montepuez which experienced a higher price of 9% higher than 12 months ago.

Table 11: Percentage Changes in rice prices in Southern Africa[35]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	Lilongwe, MWK/Kg**	2,000.00	0.00	0.00	12.68	25.00
Malawi	Rice	Mzuzu, MWK/Kg*	1,856.25	3.13	-2.94	-0.20	4.87
Mozambique	Rice (imported)	Maputo, Retail, MZN/Kg****	50.00	0.00	0.00	-2.44	0.00
Mozambique	Rice (imported)	Montepuez, Retail, MZN/Kg****	60.00	0.00	0.00	0.00	9.09
Mozambique	Rice (imported)	National Average, Retail, MZN/Kg****	60.00	3.45	4.99	-1.15	1.57

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

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

Fertiliser

The national prices of all types of fertilisers for both Mozambique and Zambia remain stable or lower compared to the past month (**Table 12**). The current price of NPK12 is lower than the past 6 and 12 months in Mozambique by more than 7% compared to NPK23 which has a slight uptick of 3.65% over the past 6 months and a low decrease of 0.55% over the past 12 months. Zambia prices of both NPK10 and Urea have demonstrated an elevation compared to the past 6 and 12 months with price increases ranging between 5.35% to 21.19%.

Table 12: Percentage Changes in Fertiliser prices in Southern Africa[36]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Mozambique	NPK 12-24-12	Nationa Average, MZN/50KG	2,871.00	0.00	0.45	-7.42	-7.86
Mozambique	NPK 23-10-5 +3S + 1Zn	Nationa Average, MZN/50KG	2,893.00	0.00	1.51	3.65	-0.55
Mozambique	Urea	Nationa Average, MZN/50KG	2,811.00	0.00	-0.60	-10.59	-16.11
Zambia	NPK 10-20-10 + 6S	National, ZMW/50KG	980.80	-2.52	5.72	21.19	8.78
Zambia	Urea	National, ZMW/50KG	964.33	-1.33	-4.43	5.35	13.45

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

[34] Author's construction based on FAO data

[35] Author's construction based on FAO data

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

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

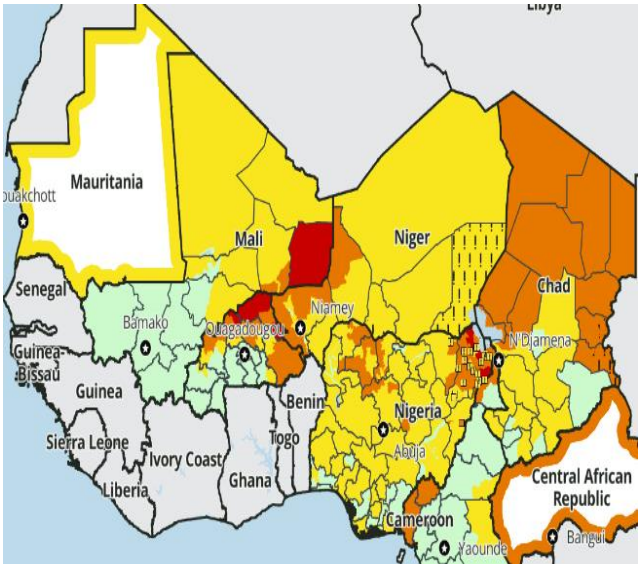
Seasonal Monitor and Cropping Conditions

In Southern Africa, the lean season is expected to begin earlier than normal across the region after the poor crop harvests in April and May and limited seasonal improvements in food access. In **Malawi**, some winter/irrigated production is ongoing, although expected to be low due to below-average rainfall, leading to low water levels and reduced river flows. In **Zimbabwe**, the government plans to invest 1.6 billion USD in the 2024/25 agricultural season through crop input assistance in anticipation of an average and timely start to the 2024/25 rainy season, with the emergence of La Niña ENSO conditions in August-October.

West Africa Food Security Update

Food Security Outlook

Figure 10: West African countries Food Security Outlook, July - September 2024



In **Burkina Faso**, food insecurity situation is expected to worsen despite the beginning of the harvest season with Crisis (IPC Phase 3) outcomes generally projected across the country. But areas with high levels of displaced people and blockades, some poor households are likely to be in Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5).[37]

In **Niger**, Crisis (IPC Phase 3) outcomes are expected in conflict and insecurity affected regions of Tillabéry, Northwest Tahoua, Diffa, and South West Maradi, while Stressed (IPC Phase 2) outcomes will dominate in agricultural and agro-pastoral areas of the North, Centre, pastoral areas, and Southwest of the country in June through September 2024.[38]

In **Nigeria**, Crisis (IPC Phase 3) outcomes continue to persist in Northeast, Northwest, and North Central Nigeria due to ongoing widespread conflicts and macroeconomic conditions.[39] The rest of the country, however, is expected to be experiencing Stressed (IPC Phase 2) outcomes. In **Mali**, Crisis (IPC Phase 3) to Emergency (IPC Phase 4) conditions are anticipated in insecure areas of the Gao, Mopti, Liptako Gourma and Ménaka areas, with a proportion of households in inaccessible areas expected to be experiencing Catastrophe (IPC Phase 5) situations through September 2024.[40] In **Togo**, Crisis (IPC Phase 3) outcomes persist in the north due to jihadist attacks in late June and mid-July 2024.[41] Other parts of the country are also experiencing IPC Phase 3 food insecurity conditions due to the impact of the lean season.

Prevalence of Insufficient Food Consumption

As of 29th July 2024, the number of people with insufficient food for consumption across seven selected West African countries stands at 162.7 million (Table **13**). This is an increase of 4.3 million people from June, driven an increase seen in Ghana and Nigeria by 5.77% and 3.98%, respectively. The prevalence of insufficient food consumption in July 2024 also remains above that of July 2023 (125.7 million people) and July 2022 (107.9 million people). In terms of changes in individual countries compared to the past year, all monitored countries in West Africa have experienced surges, with Cote d'Ivoire and Nigeria having the most surges at 41.67% and 39.01% respectively.

[37] https://fews.net/west-africa/burkina-faso
[38] https://fews.net/west-africa/niger
[39] https://fews.net/west-africa/nigeria
[40] https://fews.net/west-africa/mali
[41] https://fews.net/west-africa/togo

Table 13: Prevalence of Insufficient Food Consumption in selected West African countries (July 2024)[42]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Burkina Faso	19.80	11.20	11.20	56.57	0.00	3.70	3.70
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00	41.67	-1.92
Ghana	29.80	5.50	5.20	18.46	5.77	10.00	-14.06
Mali	19.10	13.20	13.20	69.11	0.00	3.94	16.81
Niger	25.90	21.40	21.40	82.63	0.00	25.88	25.88
Nigeria	202.80	104.40	100.40	51.48	3.98	39.01	89.47
Togo	7.90	1.90	1.90	24.05	0.00	26.67	-9.52

**Current month and **Previous month*

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

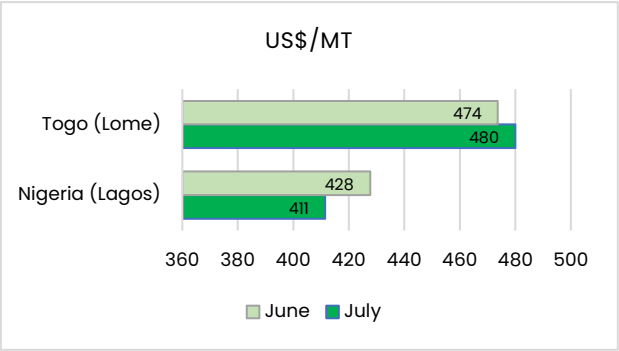
Commodity prices

Key drivers of the price movements in West Africa include[43]

Insecurity & Armed Conflicts	Conflict, insecurity and political tension in West Africa continue to disrupt agriculture, trade and food assistance activities, resulting in higher food prices.
Macroeconomic Challenges	Poor macroeconomic conditions, driven by high Inflation rates, local currency depreciations and elevated fuel prices are pushing food prices upwards in some West African countries.
Seasonal Dynamics	Seasonal changes in food supply, including the early onset of the lean season in most countries in West Africa, are putting upward pressure on food prices.

Maize

Figure 11: Price spreads for Maize across select West African Countries[44]



Nigeria's national average price of maize in US Dollars shows a decline over the past month, being lower at US$411/Mt, compared to Togo's US$470/Mt, largely contributed to ongoing currency weakening (**Figure 11**). However, the overall local prices of maize grain in the two West African countries show higher trends compared to the past 3-12 months, except for a few markets in Togo whose current price is stable or declined compared to the past 12months (**Table 10**). The price of maize, particularly in Kara, is 19.12% lower than a year ago.

Table 14: Percentage Changes in maize prices in West Africa[45]

[42] Author's construction based on WFP HungerMap Live
[43] Fewsnet 2024
[44] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[45] Author's construction based on FAO data

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Nigeria	Maize (white)	Giwa, NGN/KG**	612.20	12.67	15.04	198.63	58.60
Nigeria	Maize (white)	Ibadan, NGN/KG**	660.00	0.00	0.76	141.58	60.98
Nigeria	Maize (white)	Kano, NGN/KG**	647.28	15.72	9.83	183.15	57.45
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	645.60	11.65	17.97	176.94	60.15
Nigeria	Maize (white)	Lagos, NGN/KG**	654.40	-0.32	11.20	165.15	55.59
Nigeria	Maize (white)	Maiduguri, NGN/KG**	620.00	-0.80	12.73	189.72	49.04
Togo	Maize (white)	Amegnran, XOF/Kg	265.00	0.00	6.00	17.78	6.00
Togo	Maize (white)	Anie, XOF/Kg	255.00	2.00	2.00	18.60	6.25
Togo	Maize (white)	Cinkassé, XOF/Kg	260.00	0.00	4.00	18.18	0.00
Togo	Maize (white)	Kara, XOF/Kg	275.00	1.85	5.77	10.00	-19.12
Togo	Maize (white)	Korbongou, XOF/Kg	260.00	-11.86	6.12	18.18	0.00
Togo	Maize (white)	Lomé, XOF/Kg	290.00	0.00	7.81	18.37	7.41

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

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

Rice

Figure 12: Price spreads for rice across select West African Countries[46]

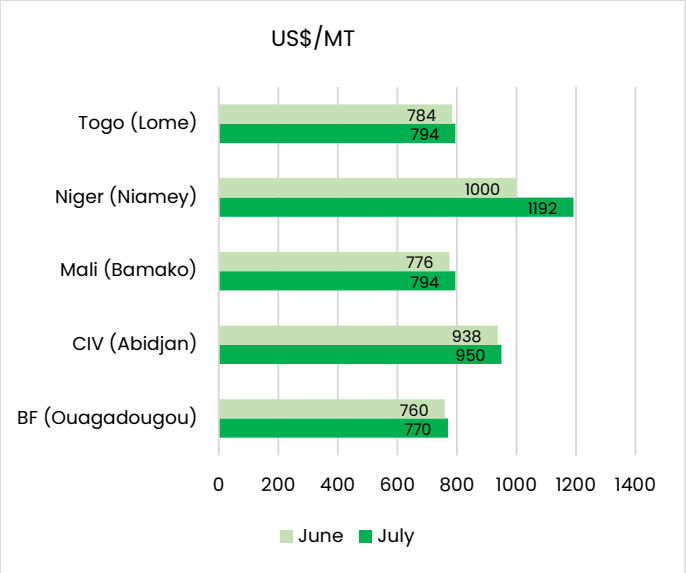


Figure 12 presents the price spread for rice across select West African countries, showing that Niamey has the highest price at US$1192/Mt, while Ouagadougou recorded the cheapest at US$770/Mt. Regarding changes in prices (**Table 15**), the price of rice in markets of Burkina Faso remained stable or declined compared to the past 1-3 months but showed an upsurge to between 12.5% and 22.73% compared to the past 6-12 months in Dori. Although there is a significant decline in rice prices in Lagos compared to the past 1-12 months, all other markets in Niger and Nigeria have recorded significantly higher prices over the same periods, ranging from 4.29% in Agadez to 323.31% in Ibadan.

Table 15: Percentage Changes in rice prices in West Africa[47]

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

[47] Author's construction based on FAO data

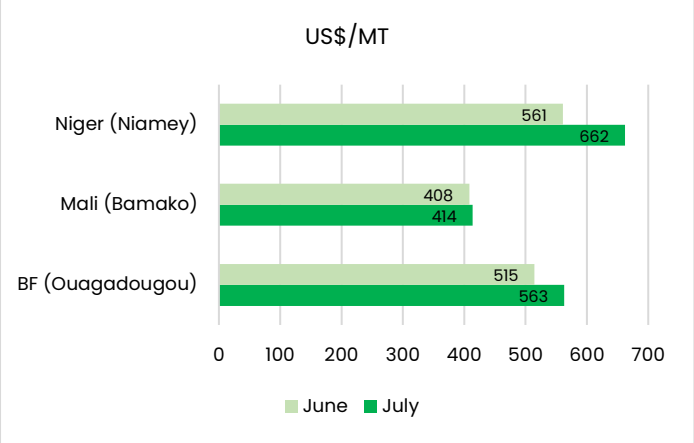
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg*	42,000.00	0.00	0.00	0.00	0.00
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg*	54,000.00	-5.26	-1.82	12.50	22.73
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg*	46,500.00	0.00	0.00	1.09	20.78
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg**	574.00	-2.21	-2.55	-0.86	4.36
Cote d'Ivoire	Rice (imported	Abidjan, Retail, XOF/Kg**	502.00	0.80	-0.20	0.40	8.19
Mali	Rice	Bamako, Wholesale, XOF/100 KG*	48,000.00	1.05	6.67	18.52	4.35
Mali	Rice	Kayes, Wholesale, XOF/100 KG*	52,000.00	0.00	0.00	4.00	4.00
Mali	Rice	Sikasso, Wholesale, XOF/100 KG*	46,000.00	-4.17	-2.13	2.22	2.22
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG*	45,000.00	0.00	2.27	4.65	4.65
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG*	43,500.00	-4.40	-3.33	-3.33	14.47
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG*	45,000.00	-6.25	-6.25	2.27	-5.26
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg*	730.00	4.29	21.67	14.06	55.32
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg*	740.00	15.63	19.35	19.35	60.87
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg*	720.00	9.09	20.00	12.50	53.52
Nigeria	Rice (imported)	Ibadan, NGN/KG**	2,760.00	96.44	85.86	323.31	290.49
Nigeria	Rice (imported)	Lagos, NGN/KG**	656.40	-60.51	-55.47	-25.10	-16.28
Nigeria	Rice (imported)	Maiduguri, NGN/KG**	2,224.00	38.57	56.07	164.13	161.03
Togo	Rice (imported)	Amegnran, XOF/Kg	500.00	0.00	2.04	-7.41	-9.09
Togo	Rice (imported)	Anie, XOF/Kg	480.00	0.00	1.05	-4.00	4.35
Togo	Rice (imported)	Cinkassé, XOF/Kg	480.00	0.00	2.13	-2.04	3.23
Togo	Rice (imported)	Lomé, XOF/Kg	480.00	0.00	0.00	-4.95	-2.04

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

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

Millet

Figure 13: Price spreads for rice across select West African Countries[48]



In **Figure 13**, the price spread for millet across all select West African countries has increased, with a notable uptick recorded in Niger by more than 18% compared to the previous month in USD currency to US$662/Mt, while Mali is the cheapest at US$414/Mt. These prices, however, remain mostly considerably above the levels seen 1-12 months ago in most select markets across the region (**Table 16**). These high prices were underpinned by several factors, such as high production costs, transport costs (influenced by fuel price Increases), local production shortfalls in 2023, and strong domestic and export demand[49] (**Table 16**).

Table 16: Percentage Changes in millet prices in select West African Countries[50]

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

[49] Refer to https://www.fao.org/giews/food-prices/regional-roundups/detail/en/c/1698125/

[50] Author's construction based on FAO data

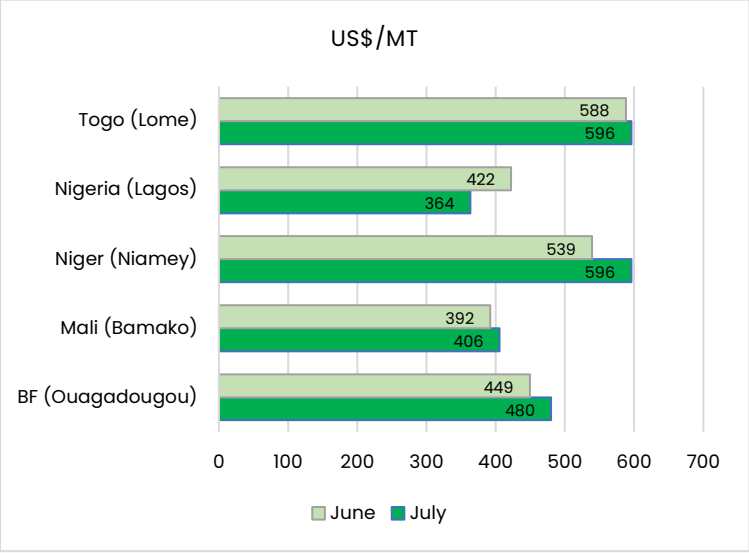
Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg*	37,000.00	13.85	13.85	13.85	4.23
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg*	37,000.00	5.71	5.71	12.12	7.25
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg*	28,000.00	0.00	0.00	7.69	3.70
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg*	37,500.00	0.00	41.51	36.36	25.00
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg*	34,000.00	7.94	19.30	28.30	23.64
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg*	3,250.00	-90.00	-90.00	-88.79	-89.17
Mali	Millet	Bamako, Wholesale, XOF/100 KG*	27,500.00	5.77	10.00	34.15	19.57
Mali	Millet	Kayes, Wholesale, XOF/100 KG*	35,000.00	25.00	29.63	29.63	29.63
Mali	Millet	Mopti, Wholesale, XOF/100 KG*	29,000.00	0.00	5.45	26.09	11.54
Mali	Millet	Sikasso, Wholesale, XOF/100 KG*	27,500.00	5.77	10.00	22.22	10.00
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG*	34,000.00	0.00	13.33	13.33	-2.86
Niger	Millet	Agadez, Wholesale, XOF/Kg*	380.00	0.00	31.03	18.75	20.63
Niger	Millet	Dosso, Wholesale, XOF/Kg*	395.00	9.72	31.67	58.00	41.07
Niger	Millet	Maradi, Wholesale, XOF/Kg*	395.00	27.42	43.64	51.92	51.92
Niger	Millet	Niamey, Wholesale, XOF/Kg*	400.00	14.29	26.98	37.93	29.03
Niger	Millet	Tillaberi, Wholesale, XOF/Kg*	440.00	15.79	25.71	41.94	39.68
Nigeria	Millet	Ibadan, NGN/KG**	1,425.60			386.22	233.71
Nigeria	Millet	Kano, NGN/KG**	1,411.22	133.51	147.79	452.81	277.92
Nigeria	Millet	Kaura Namoda, NGN/KG**	1,408.00	139.25	164.54	435.52	247.83
Nigeria	Millet	Lagos, NGN/KG**	1,560.80	139.02	175.76	449.58	266.38
Nigeria	Millet	Maiduguri, NGN/KG**	1,540.00	151.43	181.28	558.12	313.98

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

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

Sorghum

Figure 14: Price spreads for sorghum across select West African Countries[51]



Both Togo and Niger recorded the highest price for sorghum at US$596/Mt compared to the rest of the selected West African countries, while Nigeria registered the cheapest at US$364/Mt (**Figure 14**). However, **Table 17** shows that apart from Mali's Tombouctou market and mostly Togo's select markets, sorghum prices remain largely above their levels in the past 1-12 months. The sorghum prices in Togo largely remain below what was recorded in the past 6-12 months and show stability or low increase (0-5%) compared to the past month. These price spikes can be attributed to low market supply due to the region's below-average cereal output in 2023, conflict-related market disruptions, and reduced cereal imports from neighbouring countries within the same region.

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

Table 17: Percentage Changes in prices in Mali [52]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg*	25,000.00	11.11	8.70	13.64	13.64
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg*	33,000.00	1.54	3.13	20.00	10.00
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg*	27,000.00	3.85	3.85	12.50	10.20
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg*	29,000.00	5.45	13.73	31.82	31.82
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG*	25,000.00	2.04	4.17	31.58	13.64
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG*	31,000.00	19.23	24.00	34.78	24.00
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG*	25,000.00	19.05	19.05	38.89	25.00
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG*	32,500.00	0.00	0.00	8.33	-1.52
Niger	Sorghum	Agadez, Wholesale, XOF/Kg*	380.00	22.58	31.03	18.75	22.58
Niger	Sorghum	Dosso, Wholesale, XOF/Kg*	370.00	5.71	8.82	42.31	48.00
Niger	Sorghum	Niamey, Wholesale, XOF/Kg*	360.00	2.86	28.57	33.33	22.03
Niger	Sorghum	Tillaberi, Wholesale, XOF/Kg*	475.00	35.71	37.68	58.33	63.79
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	679.14	13.19	3.69	142.55	46.37
Nigeria	Sorghum (white)	Kano, NGN/KG**	570.40	3.77	22.84	162.28	64.30
Nigeria	Sorghum (white)	Lagos, NGN/KG**	580.00	-10.49	-0.34	106.70	46.17
Nigeria	Sorghum (white)	Maiduguri, NGN/KG**	565.00	-0.88	6.10	200.53	72.26
Togo	Sorghum	Anie, XOF/Kg	320.00	3.23	6.67	-14.67	6.67
Togo	Sorghum	Cinkassé, XOF/Kg	300.00	0.00	5.26	-14.29	0.00
Togo	Sorghum	Kara, XOF/Kg	320.00	3.23	3.23	-20.00	-5.88
Togo	Sorghum	Korbongou, XOF/Kg	300.00	1.69	3.45	-14.29	0.00
Togo	Sorghum	Lomé, XOF/Kg	360.00	0.00	2.86	-23.40	0.00

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

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

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

Fertiliser

Overall, the prices of monitored fertiliser types across the selected West African countries show low to high price decrease when compared to the past 1-12 months, apart from NPK15 and NPK20 in Nigeria being 30.96% and 16.44% higher respectively compared to the past 3 months (**Table 18**). The current prices are significantly lower, ranging from 4.76% to 49.51%, than they were 6-12 months ago. The higher price of NPK in Nigeria can be attributed to heightened costs of raw materials, increased ex-factory prices, as well as the high cost of fuel (diesel) that leads to elevated transportation costs.[53]

Table 18: Percentage Changes in Fertiliser Prices in West Africa[54]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG	30.06	-14.48	-12.05	-21.08	-24.64
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG	32.36	-11.39	-11.87	-16.04	-20.74
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG	30.98	-4.38	-7.27	-13.70	-20.09
Nigeria	NPK 15-15-15	National, USD/50KG	31.81	-11.32	30.96	-4.76	-44.58
Nigeria	NPK 20-10-10	National, USD/50KG	25.57	-12.07	16.44	-16.19	-49.51
Nigeria	Urea	National, USD/50KG	23.06	-16.78	-4.67	-21.40	-42.68

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

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

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

[52] Author's construction based on FAO data

[53] AfricaFertilizer https://wp.vifaakenya.org/wp-content/uploads/2024/04/Nigeria-Fertilizer-Market-Comments-April-2024.pdf

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

Seasonal Monitor and Cropping Conditions

In **Niger**, above average rainfall has allowed a good start to the cropping season in late June and early July. In **Nigeria**, the main season farming activities are ongoing across the country with average to above average cumulative rainfall. Some early green harvests of maize and yam are recorded in the south. In **Togo**, above-average rainfall is supporting good cropping conditions in the south and planting activities in the north of the country.[55] In **Mali,** agriculture production is expected to be below-average due to delayed and inconsistent rainfall across the country coupled with disruptions of farming activities caused by conflicts and insecurity.

[55] https://fews.net/west-africa/togo

Food Trade Updates

Continental

- The COMESA-EAC-SADC Tripartite Free Trade Area (TFTA) agreement commenced on July 25, 2024, with 14 out of the 29 member states endorsing it, following the attainment of the required 14-member threshold. Malawi, Lesotho and Angola are the latest member states to ratify the agreement making it 14 countries.[56]
- The African Union (AU) has endorsed proposal for mobile money interoperability across Africa to facilitate smooth economic transactions and increase intra-Africa trade and development.[57]

East Africa

Figure 15 provides an overview of the events and activities that have taken place across various countries in East Africa in the last month and are affecting the food trade in the region.

Figure 15: East Africa Cross border trade updates July 2024

Kenya & Uganda

- The East African Community (EAC) is in the process of upgrading the Lwakhakha border post on the common border between Kenya and Uganda into a One-Stop Border Post (OSBP) as part of efforts to reduce congestion at the Busia and Malaba to facilitate easier movement of goods and services.

[56] https://apanews.net/history-made-as-africas-tripartite-fta-comes-in-force/; https://www.theeastafrican.co.ke/tea/business/eac-comesa-sadc-merger-into-seamless-market-begins-thursday-4698796; https://www.eac.int/press-releases/157-trade/3141-comesa-eac-sadc-tripartite-trade-area-to-come-into-force-25th-july,-2024

[57] https://www.myjoyonline.com/au-endorses-akufo-addos-proposal-for-increased-mobile-money-interoperability-across-africa-2/

Southern Africa

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

Figure 16: Southern Africa Food Trade updates for July 2024

Zimbabwe, Mozambique, and Botswana

- The Government of Zimbabwe has issued import permits to 651 firms to import 3.2 million tonnes of maize as part of its response measures to mitigate the food supply shortages driven by the El Nino induced drought.
- At the back of the commencement of the COMESA-SADC-EAC Tripartite agreement, a US$6.5 billion port and rail project involving Zimbabwe, Mozambique and Botswana has also commenced. The project is expected to improve trade infrastructure and increase trade in the tripartite region.

West Africa

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

Figure 17: West Africa Cross Border Trade Updates July 2024

Nigeria

- The ECOWAS Regional Food Security Reserve has provided Nigeria with about 7,000 Metric Tons of food grains amidst the country's ongoing food insecurity. Nigeria has launched its first shipment of exports under the Guided Trade Initiative (GTI) to five African countries, namely Cameroon, Kenya, Algeria, Uganda and Egypt. The exports include bags, ceramics, textiles, cables, smart cards, Clinkers Black soap, native starch, and Shea butter.

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

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

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AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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