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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 52nd 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 October 2024 Food Security Monitor are summarised below:

Food Security Updates

In **East Africa**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes persist across many parts of the monitored countries, except in South Sudan, where widespread Emergency (IPC Phase 4) conditions persist, with Catastrophic (IPC Phase 5) conditions expected in some households in hard-to-reach areas of Pibor, among returnees and refugees in transit areas like Renk, Rubkona, and Aweil East, and for some displaced households in the most severely flood-affected regions of Jonglei, Unity, Warrap, and parts of Upper Nile and Northern Bahr el Ghazal. In **Southern Africa**, Crisis (IPC Phase 3) conditions are projected to persist across the region through March 2025. In Malawi, FEWS NET projects that the number of people experiencing Crisis (IPC Phase 3) conditions, mainly in southern Malawi, will peak at around 4–5 million between January and March 2025. In Mozambique, the Food Security Cluster (FSC) partners aim to support 1.1 million people affected by El Niño, with current outreach reaching 30% of the target population as outlined in the 2024 Humanitarian Response Plan. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes mostly prevail in West **African** region, except in Togo where Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes are expected to prevail in Savannah regions and other parts of the country until the pre-lean season in April/May 2025 due to generally average harvests.

Food Commodity Prices Updates

Overall, the national average price of maize (in local currency) in the **Eastern African** region is significantly lower in all select East African countries except for South Sudan where maize prices remain 123.16%–238.01% higher than the past 1–12 months. Tanzania maintains the lowest maize prices (in USD terms) at USD 221/Mt compared to over USD 300/Mt in all other countries. Kenya has the most expensive prices (in USD terms) for maize, wheat, rice, and beans in the region, with Kenya's maize price reflecting a 40% premium over the import parity price from southwest Tanzania. Uganda's prices remained considerably low compared to the past 1–12 months, while Ethiopia's wheat prices higher than the past 1–6 months associated with below-average stocks, high demand, insecurity that disrupted agricultural operations in some parts of Amhara region. In **Southern Africa**, the national average prices of maize in local currencies show slight increases compared to the past month underpinned by currency depreciation and costs associated with transportation of maize from neighbouring countries like Tanzania. The ongoing power crisis in Zambia and limited forex availability in Malawi pose challenges to price stabilisation in the future. However, weather forecast predicts a high probability of above-average rainfall in the region between November 2024 and April 2025, supported by the likely occurrence of a La Niña event that is expected to bring ample rainfall and improve Zambia's electricity generation through hydro-power plants.

In **West Africa**, the overall local prices of maize show a significantly upward trend compared to October 2023 between 11.11% and 299.59% occasioned by weak currency, high transport costs and strong domestic demand resulting from below-average cereal production. The prices of rice, millet, and sorghum remain above their 3, 6, and 12-month levels in most monitored West African countries, though they have shown stability or declines over the past month, attributed to the completion or near-completion of main-season cereal harvests in the region. Nigeria registered the most significant rise in prices of maize and rice, at 299.59% and 170.24% respectively, higher than a year ago. The impact of drought conditions remains a concern in Ghana, where almost 50% of the country's cropland area has been impacted by poor germination and crop wilting and stunting, and many parts of the middle belt and north have experienced crop failures. With the ongoing high inflation rates, currency depreciation, conflict-related market disruptions and elevated fuel prices continue to pose a threat to staple crop prices in this region.

Food Trade Updates

- Tanzania joins Lobito Corridor linking the Indian Ocean to the Atlantic (The East African). The Lobito Corridor project, which connects four African countries, is ready for implementation after the US awarded a technical assistance grant for an environmental assessment study. A feasibility study and the signing of the concession agreement are also complete for the 780 km greenfield railway connecting the Lobito rail line in Luacano, Angola, to the existing railway line in Chingola, Zambia.
- Malawi and Mozambique successfully concluded and signed the Simplified Trade Agreement (STR) framework between them. The framework, which will ensure smooth participation of small-scale cross-border traders in regional trade, was signed on 18th October 2024 in Lilongwe, Malawi.
- Zambia has officially joined the Central Corridor, which connects landlocked countries to the Indian Ocean via Tanzania, thereby extending the corridor's reach southward beyond the East African Community (EAC) bloc.
- Zimbabwe has submitted its provisional tariff concession schedule to the African Continental Free Trade Area (AfCFTA) secretariat as the Government steps up efforts toward fully implementing a range of trade facilitation measures.
- The ECOWAS Bank for Investment and Development (EBID), at its 89th Ordinary Session, approved investments totalling EUR 61 million and USD 100 million to stimulate the infrastructure, trade, and sustainable development sectors in West Africa.

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**) provides 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 prices² over the past year. **Figure 1** displays the prevalence of IFC in October 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 (50%). South Sudan and Uganda are also inching close to hotspot status with 44.5% and 42.2%, respectively, of their populations lacking sufficient food for consumption. There have been no changes in the number of people with IFC in October compared to September for most countries, except Nigeria which experienced a decline of 6.46%. Compared to a year ago, most countries have experienced increases in the number of people with IFC except Burkina Faso and Mali where it remained stable, and Mozambique and Zambia where it declined.

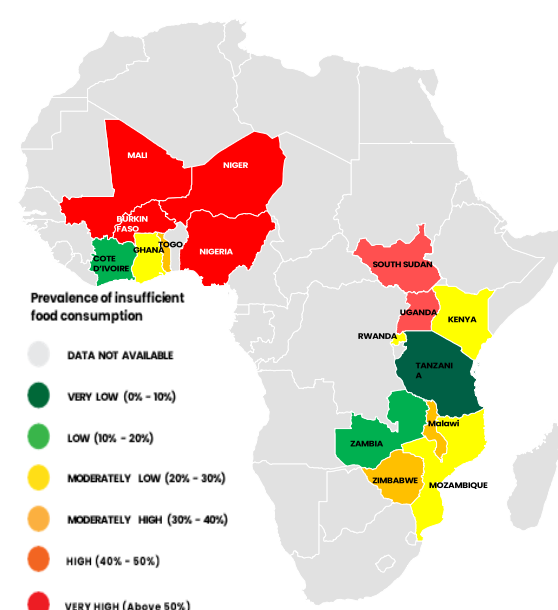
Changes in the national average prices of maize and rice over the past six months showed a decline in Côte d'Ivoire, Uganda, Zambia, and Zimbabwe but rose in all other countries. Also, compared to a year ago, maize prices declined in all five East African countries monitored (Ethiopia, Kenya, Rwanda, Tanzania and Uganda) but increased in all the Southern and West African countries, indicating seasonal influence in the East African countries.

Table 1: IFC and Commodities Price (Local Currency) 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	0.00	1.86	13.31
Cote d'Ivoire	0.00	15.91	-7.92	6.57
Ethiopia			8.05	-3.16
Ghana	0.00	52.73		
Kenya	0.00	7.09	1.48	-44.05
Malawi	0.00	33.33	11.80	11.64
Mali*	0.00	0.00	8.02	12.62
Mozambique	0.00	-13.64		
Niger	0.00	0.94	3.60	3.94
Nigeria	-6.46	16.28	58.73	240.70
Rwanda	0.00	5.88	24.07	-22.87
South Sudan	0.00	40.00	123.16	238.01
Tanzania	0.00	26.83	20.00	-32.74
Togo	0.00	42.11	11.21	18.46
Uganda	0.00	127.85	-1.08	-28.56
Zambia	0.00	-26.67	-5.55	26.81
Zimbabwe	0.00	23.40	-1.48	93.68

Key: No Change = increase = decrease

Figure 1: Hunger Hotspots Snapshot, September 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, Côte 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**) increased by 2% from its revised September level to stand at 127.4 points in October 2024, the highest since April 2023. This is supported by an increase in all sub-indices except meat, with vegetable oils recording the largest increase at 7.3%. Concerns are mounting over adverse weather conditions impacting winter crop sowing in key northern hemisphere exporters such as the European Union, the Russian Federation, and the United States. Furthermore, the reintroduction of an unofficial price floor in the Russian Federation, coupled with escalating tensions in the Black Sea region, has driven prices upward.³ On the other hand, as of 31st October 2024, the International Grain Council's (IGC) Grain and Oil Index (GOI) has declined by 3.22% and 11.66% against the previous one month and year respectively (**Table 2**). Compared to a month ago, the decline is attributed to declines in the sub-indices of wheat (1.12%), rice (10.4%), and soya beans (4.65%). Compared to a year ago, all sub-indices have seen declines contributing to the overall decline in the GOI. Wheat, rice, and soya beans declined the most by 8.54%, 11.79%, and 16.31% respectively.

Figure 2: FAO Food Price Index (FFPI)

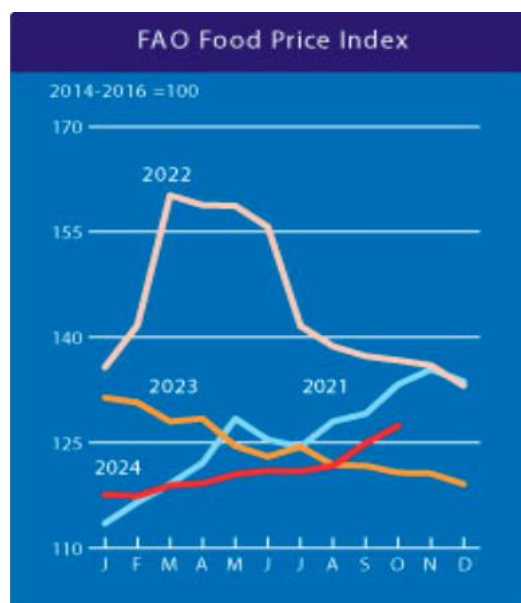


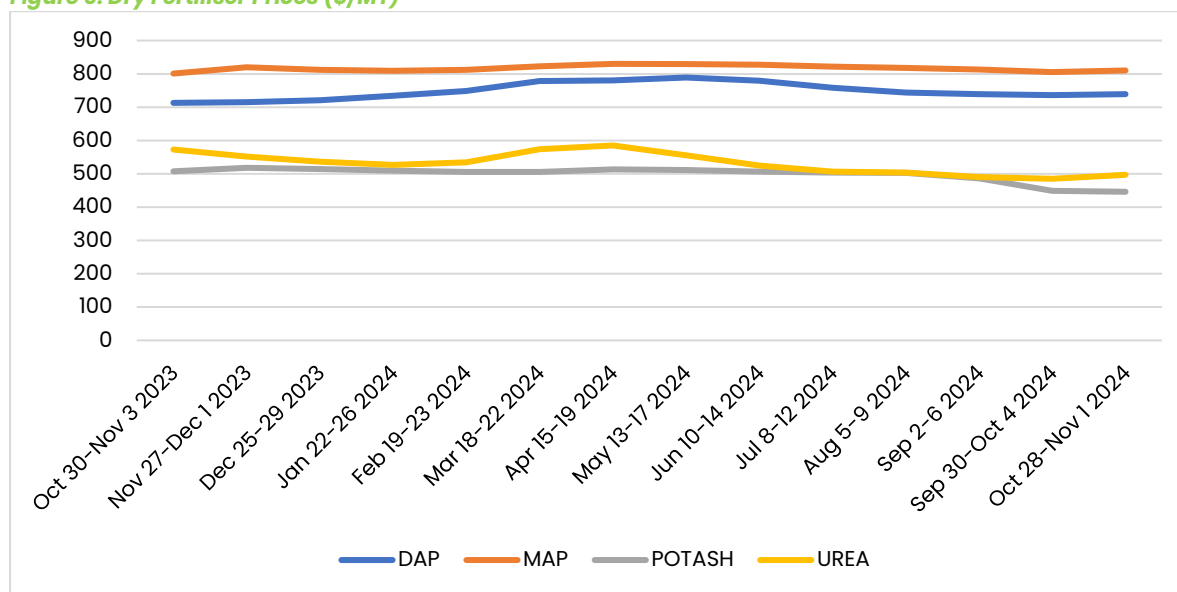
Table 2: IGC GOI Commodity Price Indices

Jan 2000 = 100	31-Oct	% Change 1M	% Change 1Y
GOI	223.98	-3.22	-11.66
Wheat	205.02	-1.12	-8.54
Maize	221.88	1.23	-3.91
Rice	213.73	-10.40	-11.79
Soya beans	211.35	-4.65	-16.31
Barley	215.91	-	-2.83

Global Fertiliser Prices

All fertiliser types (**Figure 3**) have had a slight uptick over the past month, except potash which had a minor downturn of 0.7%. Compared to the past year, however, potash and urea show lower trends by 12.2% and 13.3% respectively while DAP and MAP have had 3.6% and 1.1% increase.

Figure 3: Dry Fertiliser Prices (\$/MT)



Source: Author's construction based on DTN⁴

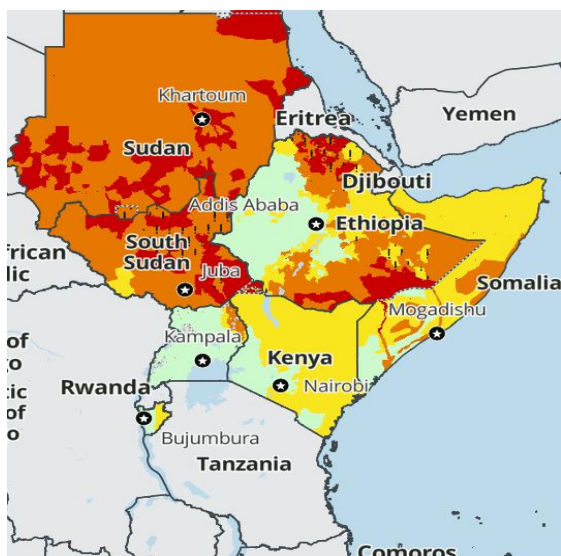
³ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁴ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2024/11/06/majority-retail-fertilizer-prices>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, September – November 2024



In **Ethiopia**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes are projected in the northern part of the country, as the impact of the 2024 *Meher* harvests gradually improves the acute food insecurity situation in the country.⁵ At the same time, the food insecurity situation is expected to improve to Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes in much of central and eastern Ethiopia. In **Kenya**, Crisis (IPC Phase 3) outcomes are expected to persist through January 2025 in flood-affected riverine areas of Garissa and Tana River counties as well as in the worst drought-affected areas in Turkana and Marsabit.⁶ However, Stressed (IPC Phase 2) outcomes are expected across pastoral and marginal agricultural areas.

In **South Sudan**, widespread Emergency (IPC Phase 4) conditions persist due to factors such as flooding, a worsening macroeconomic situation, extremely high food prices, ongoing conflict and insecurity, and a high number of returnees in the northern counties.⁷ However, Catastrophic (IPC Phase 5) conditions are likely continuing for some households in hard-to-reach areas of Pibor, among returnees and refugees in transit areas like Renk, Rubkona, and Aweil East, and for some displaced households in the most severely flood-affected regions of Jonglei, Unity, Warrap, and parts of Upper Nile and Northern Bahr el Ghazal.⁸ In **Uganda**, Stressed (IPC Phase 2) and Minimal (IPC Phase 1) outcomes are likely to persist through to January, supported by sufficient own-produced food stocks and low staple food prices.⁹ However, Crisis (IPC Phase 3) outcomes are expected in Karamoja, despite food stocks from the green and dry harvests in August and September, and seasonal declines in staple food prices improving food access, especially in southern Karamoja.

Prevalence of Insufficient Food Consumption

As of 31st October 2024, the number of people across five selected East African countries who did not have sufficient food for consumption has not changed from last month's level of 45.3 million. This also implies that the current state of food insecurity across the region is higher than it was in October 2023 (31.6 million) and October 2022 (43.4 million). All selected East African countries have had higher food insecurity levels than in the past one and two years with Uganda and South Sudan seeing the most significant increases at 127.85%, 53.13%, and 30% respectively.

⁵ <https://fews.net/east-africa/ethiopia>

⁶ <https://fews.net/east-africa/kenya>

⁷ <https://fews.net/east-africa/south-sudan>

⁸ Ibid

⁹ <https://fews.net/east-africa/uganda>

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (October 2024)¹⁰

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	7.09	14.29
Rwanda	12.30	3.60	3.60	29.27	0.00	5.88	20.00
South Sudan	11.00	4.90	4.90	44.55	0.00	40.00	-25.76
Tanzania	56.30	5.20	5.20	9.24	0.00	26.83	-25.71
Uganda	42.70	18.00	18.00	42.15	0.00	127.85	20.81

*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 EA¹¹

	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 Countries¹²

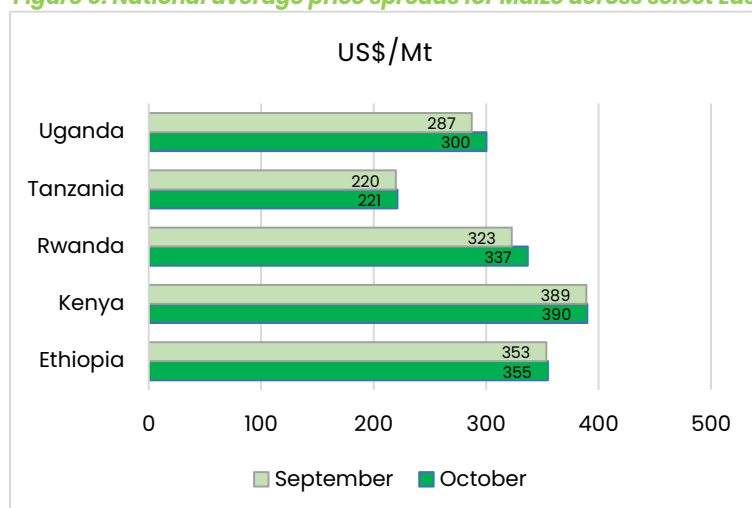


Figure 5 presents the national average price spreads for maize across select East African countries. Generally, prices in USD have slightly stabilised in most of the countries, except Uganda recording a 4.4% price increase month-on-month to USD 300/Mt largely attributed to stock depletion from maize exports to the region. Maize in Tanzania maintains the lowest price at USD 221/Mt, relatively stable compared to the previous month in local currency. Similarly, Kenya maize prices have remained stable due to the September green harvests in bimodal areas of the country, with the prices expected to remain stable through December 2024 despite being the highest in the region selling at USD 390/Mt reflecting a 40% excess margin

compared to the import parity price from southwest Tanzania.¹³ Ethiopia's maize price remained stable, currently at USD 355, despite a 3% currency depreciation compared to the previous month which is closely associated with the ongoing *Meher* season cereals harvests.

¹⁰ Author's construction based on WFP HungerMap

¹¹ FEWS NET, 2024

¹² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹³ AMO Price Tracker <https://sway.cloud.microsoft/9hBdu9fDlycEbNFs?ref=Link>

Table 4 shows changes in the local currency prices of maize across the region, with a moderate decrease in South Sudan of 9.16% and a slight increase of 4.94% and 3.68% in Rwanda and Uganda compared to the past month. However, compared to October 2023, the prices of maize remain lower in most East African countries except in South Sudan where the current price is 238.01% higher.

Table 4: Percentage Changes in Maize Prices in East Africa¹⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,262.67	3.41 ▲	0.79 ▲	8.05 ↑	-3.16 ▾
Kenya	Maize	National Average, Retail, KES/KG	50.57	1.53 ▲	-3.44 ▾	1.48 ▲	-44.05 ↓
Rwanda	Maize	National Average, Retail, RWF/Kg	453.33	4.94 ▲	20.54 ✖	24.07 ✖	-22.87 ↓
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	2,059.80	-9.16 ↓	-13.97 ↓	123.16 ✖	238.01 ✖
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	60,000.00	0.00 ●	0.00 ●	20.00 ✖	-32.74 ↓
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,662.31	0.42 ▲	28.06 ✖	9.69 ↑	-13.09 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,093.69	3.68 ▲	-1.62 ▾	-1.08 ▾	-28.56 ↓

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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 6: National average price spreads for Rice across select East African Countries¹⁵

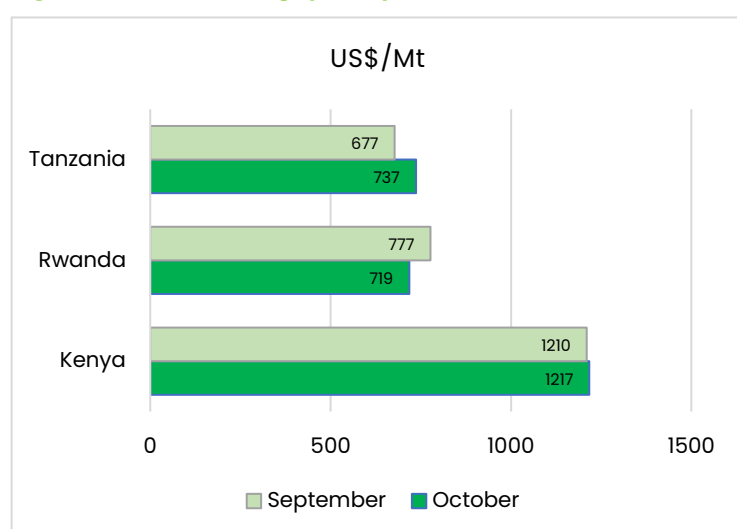


Figure 6 presents a mixed rice price spread in USD between three East African countries, showing a continued price decrease in Rwanda (8%) and a price increase in Tanzania (8%) at USD 719 and USD 737 respectively, mainly due to the increase in stock to the former and depletion in rice stocks because of increased exports to the region by the latter. Kenya has seen a slight increase of 0.6%, with an average price of USD 1,217, which can be attributed to currency fluctuations and importation costs. From **Table 5**, the local currency prices of rice in Rwanda show a decline compared to the previous 12 months, with the current price being 18.89% cheaper compared to October 2023. The general price decrease throughout the year in Rwanda is generally attributed to the positive

impact of good seasonal harvests during the year that have increased supply in the country. Kenya's current price is slightly higher compared to the past 12 months by 1.74%, although being 9.68% higher compared to the past 6 months attributed to costs of importation from Pakistan, India and Tanzania (the three leading rice importing countries to Kenya). Contrarily, prices in Tanzania have continued to increase recording 8.11% and 5.26% compared to the past 1 and 3 months respectively. With the ongoing increase in demand by both internal and external markets, the price of rice is expected to continue rising until the onset of *Vuli* harvests.

Table 5: Percentage Changes in Rice prices in East Africa¹⁶

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	155.55	0.49 ▲	1.61 ▲	9.68 ↑	1.74 ▲
Rwanda	Rice	National Average, Retail, RWF/Kg	966.67	-7.07 ↓	-11.18 ↓	-14.39 ↓	-18.86 ↓
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	200,000.00	8.11 ↑	5.26 ↑	-4.76 ▾	-24.33 ↓

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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%)

¹⁴ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

¹⁵ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁶ Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania

Beans

Figure 7: National average price spreads for Beans across select East African Countries¹⁷

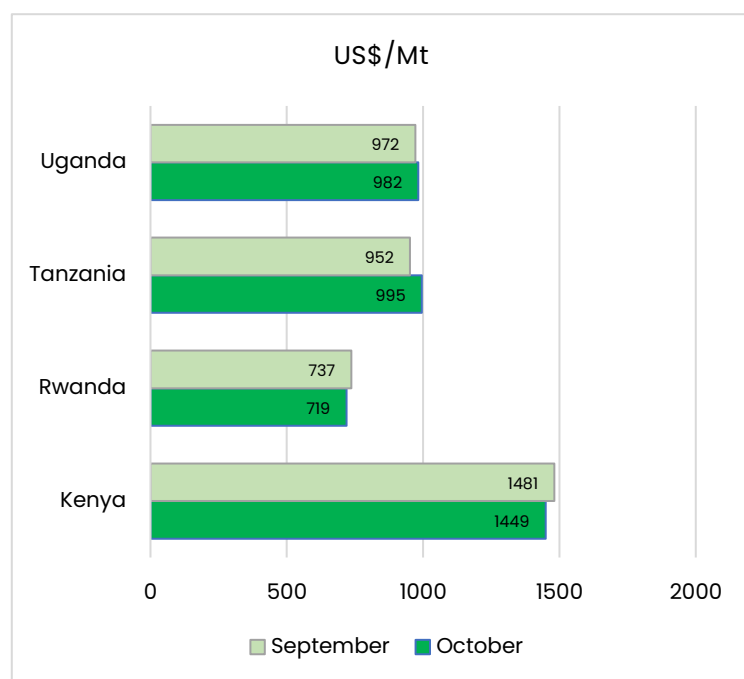


Figure 7 shows price trends of beans in USD from four select East African countries who consume it as their staple food. Both Kenya and Rwanda have seen a decrease in bean prices to USD 1449/Mt and USD 719/Mt because of September green harvests and maintained stocks respectively, with the former having the lowest retail price in the region. On the other hand, Uganda and Tanzania prices have increased to USD 982/Mt and USD 995/Mt respectively. This makes Tanzania the country with the second-highest bean prices in the region, after Kenya. The changes in prices in local currencies as shown in Table 6 also depict a similar picture as demonstrated above, however, when compared to October 2023 prices, the current prices in Kenya, Rwanda and Uganda are lower by 10.57%, 7.64% and 16.98% respectively. The current price of beans in Tanzania is generally higher compared to the past 3 and 6 months with an increase of 8%.

Table 6: Percentage Changes in Beans Prices in East Africa¹⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	185.24	-2.27 ↘	2.42 ▲	13.28 ↑	-1.98 ↘
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	139.46	-2.05 ↘	3.71 ▲	-26.30 ↓	-10.57 ↓
Rwanda	Beans	National Average, Retail, RWF/Kg	967.59	-1.90 ↘	20.49 ☒	53.99 ☒	-7.64 ↓
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	270,000.00	3.85 ▲	8.00 ↑	8.00 ↑	1.58 ▲
Uganda	Beans	National Average, Retail, UGX/Kg*	3,576.69	0.23 ▲	-10.40 ↓	-2.38 ↘	-16.98 ↓

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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%)

¹⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁸ Author's construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

Wheat

Figure 8: National average price spreads for Wheat across select East African Countries

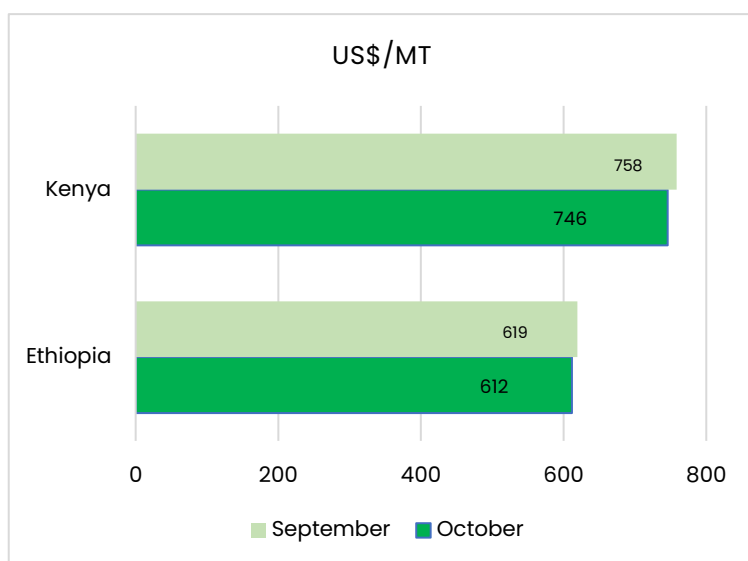


Figure 8 shows the decline in wheat prices in USD in two selected East African countries, Kenya and Ethiopia at USD 746/Mt and USD 612/Mt respectively. This translates to month-on-month price decreases of 1.3% in Kenya and 1.7% in Ethiopia. On the other hand, the local currency prices (Table 7) were higher in Ethiopia compared to the past 1-6 months with increases ranging between 0.79% and 8.05%. This rise is attributed to below-average stocks, high demand, insecurity that disrupted agricultural operations in parts of the Amhara region¹⁹. While Kenya's current wheat price is 17.24% and 86.92% higher compared to the past 6 and 12 months, the price has shown stability in the past 1-3 months, with slight decreases of 1.76% and 0.55%, respectively, during the same period.

Table 7: Percentage Changes in Wheat Prices in East Africa²⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	4,262.67	3.41 ▲	0.79 ▲	8.05 ↑	-3.16 ▼
Kenya	Wheat	National Average, Retail, KES/KG	95.33	-1.76 ▼	-0.55 ▼	17.24 ✖	86.92 ✖

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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 fertiliser prices in select East African countries have declined (Table 8). In Kenya, the price of all three types of fertilisers (CAN, DAP, NPK) shows a decline between 1.17% to 48.13% compared to the past 1-12 months. The recent Government of Kenya's confirmation of the availability of a Sh 2b fertiliser subsidy for the 2024/2025 financial year in support of the sector has contributed to stabilisation of the price in the market.²¹ Similarly, in Rwanda, all three types of fertilisers (DAP, NPK, Urea) recorded price declines between 1.62% and 11.78% compared to the past 1-12 months.

Table 8: Percentage Changes in Fertiliser prices in East Africa²²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	91.42	-24.30 ▼	-1.17 ▼	-14.32 ▼	-8.12 ▼
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	120.62	-4.94 ▼	-7.97 ▼	-48.13 ▼	-44.73 ▼
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	95.67	-10.66 ▼	-8.29 ▼	-18.06 ▼	-3.59 ▼
Rwanda	DAP	National Average USD/50KG*	46.62	-1.62 ▼	-2.57 ▼	-5.15 ▼	-11.40 ▼
Rwanda	NPK 17-17-17	National Average USD/50KG*	46.94	-1.61 ▼	-2.98 ▼	-5.53 ▼	-11.78 ▼
Rwanda	Urea	National Average USD/50KG*	35.94	-1.62 ▼	-2.65 ▼	-5.22 ▼	-11.39 ▼

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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%)

¹⁹ GIEWS Ethiopia Country Brief <https://www.fao.org/giews/countrybrief/country.jsp?code=ETH&lang=fr>

²⁰ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

²¹ MyGov [GAA | Government Advertising Agency](https://mygov.go.ke/GAA)

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 Conditions²³

In **Ethiopia**, the harvesting of Meher season cereals has begun with a favourable agro-climatic condition for crop development despite ongoing heavy rainfall and flooding affecting many areas in the country. In **South Sudan**, first season cereals are in vegetative to reproductive stage, while conditions have worsened in central and northern areas impacted by persistent flooding since May. However, planting second season maize and sorghum continues under favourable conditions in bimodal Equatorial regions located in the southwest and south-centre of the country.

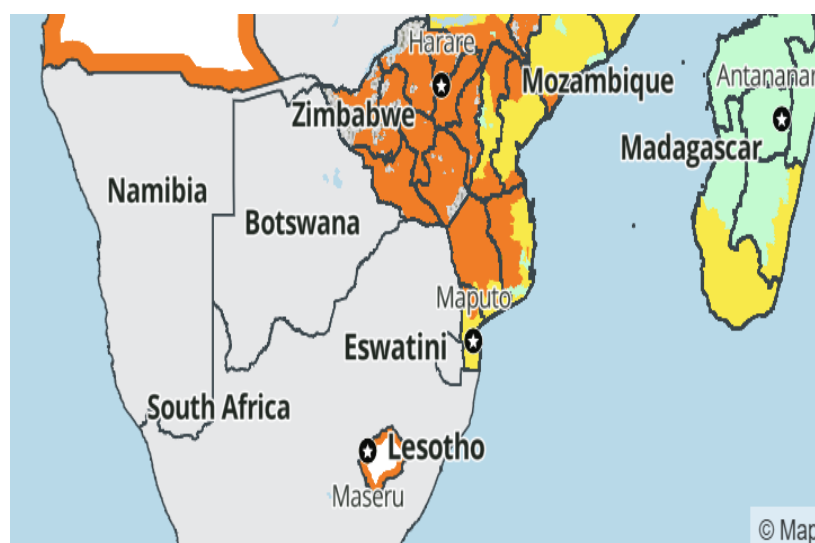
Harvesting of *Long Rains* sorghum crops completed under poor conditions in bimodal and minor producing areas in the eastern half of **Kenya**. However, cereals continue to develop under favourable conditions in unimodal and major producing areas in the western half of the country. In **Uganda**, harvesting of first season cereals is nearing completion under favourable conditions, with planting of second season cereals continuing under favourable conditions in bimodal areas of the centre and south. Weather forecasts reveal that rain will be above average through December, an indication of good crop production. Land preparation and planting for *Vuli* season maize in **Tanzania** has commenced, with harvesting expected in March next year.

²³ [EarlyWarning_CropMonitor_202410.pdf](#)

Southern Africa Food Security Update

Food Security Outlook

Figure 9: Southern Africa Countries Food Security Outlook, September–October 2024



In **Malawi**, the start of humanitarian food assistance in October in parts of the southern and central regions is anticipated to enhance food security, shifted conditions from Crisis (IPC Phase 3) to Stressed (IPC Phase 2). The food security situation is expected to further improve, particularly in the central and northern districts, from April/May 2025 as households begin to access food from their 2023/2024 harvests and market purchases, along with continued humanitarian aid.²⁴ Nonetheless, FEWS NET projects that the number of people experiencing Crisis (IPC Phase 3) conditions, mainly in southern Malawi, will peak at around 4–5 million between January and March 2025.²⁵

In **Mozambique**, Crisis (IPC Phase 3) conditions are expected to continue through March 2025, especially in the central region, areas impacted by the El Niño-induced drought during the 2023/2024 agricultural season, and regions in the north affected by ongoing conflict, further exacerbated by the peak of the lean season.²⁶ The Food Security Cluster (FSC) partners are aiming to support 1.1 million people affected by El Niño, with current outreach reaching 30% of the target population as outlined in the 2024 Humanitarian Response Plan.²⁷ In **Zimbabwe**, from October 2024 to May 2025, the country is expected to experience Crisis (IPC Phase 3) outcomes.²⁸ The aftermath of the 2023/24 El Niño-induced drought has led to extensive crop losses in both surplus- and deficit-producing areas during the 2023/24 agricultural season, leading to widespread lack of own-produced food stocks and negative impacts on livelihoods and prices. Further, high prices and below-average incomes are limiting market access, resulting in higher-than-normal food assistance needs during the annual lean season.

Prevalence of Insufficient Food Consumption

As of 31st October 2024, the number of people lacking sufficient food for consumption across four selected Southern African countries did not change from what was recorded in September, 23.5 million (see **Table 9**). This level of food insecurity is also higher than the figures recorded in October 2023 (23.1 million) and October 2022 (21.0 million). Compared to a year and two years ago, Malawi registered highest increase in the number of people who did not have sufficient food for consumption at 33.3% and 106.06, respectively, while Zambia also registered a 73.68% increase over the two-year period.

²⁴ <https://fews.net/southern-africa/malawi>

²⁵ Ibid

²⁶ <https://fews.net/southern-africa/mozambique>

²⁷ Ibid

²⁸ <https://fews.net/southern-africa/zimbabwe>

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (October 2024)²⁹

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	33.33	106.06
Mozambique	29.50	7.60	7.60	25.76	0.00	-13.64	-23.23
Zambia	17.40	3.30	3.30	18.97	0.00	-26.67	73.68
Zimbabwe	15.20	5.80	5.80	38.16	0.00	23.40	-1.69

*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 10: National average price spreads for maize across select Southern African Countries³⁰

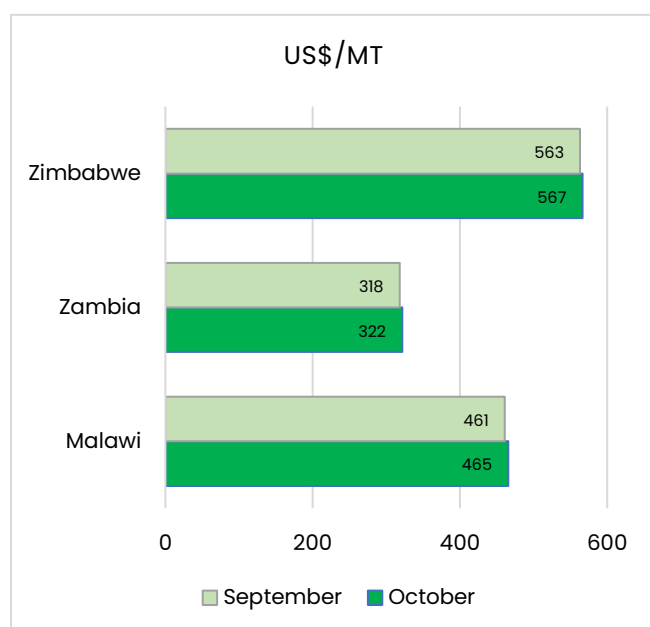


Figure 10 presents the price spread of maize in USD from Zambia, Malawi and Zimbabwe, where all three countries show slight price increase of 11% month-on-month. This increase can be attributed to high transportation costs associated with sourcing maize from neighbouring countries like Tanzania. The current water and power crisis in Zambia is hindering irrigation cropping, while Malawi's limited forex availability presents difficulties in stabilizing future prices. However, weather forecasts predict a high probability of above-average rainfall in the region between November 2024 and April 2025, shored up by the likely occurrence of a La Niña event that brings ample rainfall. These rainfall conditions are expected to not only benefit agriculture production in 2025 but also improve Zambia's electricity generation through the hydro-power plants.

As illustrated in **Table 10** below, the current prices of maize in local currencies are moderately low to slightly high ranging

from 5.55% to 23.40% respectively compared to the past 1-6 months. Continued efforts to import from Tanzania and WFP Food Assistance Initiatives have contributed to lowering these prices. However, these prices remain very high compared to last year between 6.22% and 93.68%. This situation is being felt by these countries due to poor main season harvests this year.

²⁹ Author's construction based on HungerMap

³⁰ 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 Africa³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Liwonde, MWK/Kg	891.15	6.05 ↑	4.95 ▲	13.23 ↑	6.22 ↑
Malawi	Maize	Mzimba, MWK/Kg	738.79	3.39 ▲	6.30 ↑	10.93 ↑	18.73 ⓧ
Malawi	Maize	Mzuzu, MWK/Kg	663.91	1.52 ▲	3.08 ▲	-3.50 ▾	10.47 ↑
Malawi	Maize	National Average, MWK/Kg	801.60	1.06 ▲	1.72 ▲	11.80 ↑	11.64 ↑
Malawi	Maize	Nsanje, MWK/Kg	895.86	2.41 ▲	-0.08 ▾	23.40 ⓧ	20.70 ⓧ
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	8.55	1.56 ▲	-2.99 ▾	-5.55 ↓	26.81 ⓧ
Zimbabwe	Maize (white)	National Average, Retail, USD/Kg*	0.57	0.59 ▲	3.94 ▲	-1.48 ▾	93.68 ⓧ

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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%)

Seasonal Monitor and Cropping Conditions

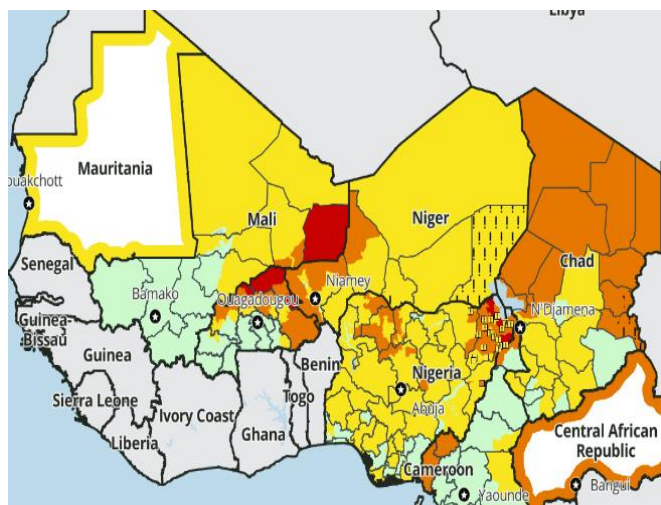
Overall, there is an early onset of the lean season in the southern African countries which is expected to last until March/April 2025. Land preparations for the 2024/25 agricultural season are ongoing with harvests expected from April/May 2025. In **Mozambique**, preparations are underway for the 2024/25 agricultural season with the Food Security Cluster (FSC) partners planning to assist 268,850 beneficiaries with agricultural inputs in preparation for the 2024/2025 agricultural season.

³¹ Author's construction based on FAO data

West Africa Food Security Update

Food Security Outlook

Figure 11: West African Countries Food Security Outlook, October – November 2024



In **Burkina Faso**, Crisis (IPC Phase 3) or worse outcomes are expected between October 2024 and May 2025 in hard to reach localities with high IDP presence due low production and conflicts or insecurity preventing access to markets.³² FEWS NET estimates 1.5–2 million people will require food assistance between February and May 2025, primarily in hard-to-reach and IDP-heavy areas in the North, Sahel, East, and Centre-North regions. In **Niger**, widespread Crisis (IPC Phase 3) persist in the regions of Tillabéry, Tahoua, Diffa and Maradi due to conflict and flooding caused by heavy rainfall. In **Nigeria**, despite the ongoing harvest, Emergency (IPC Phase 4) conditions are expected to continue in inaccessible areas of the Northeast from November 2024 to May 2025. These conditions are underpinned by restricted mobility, poor market access, limited harvests, and

households depleted coping capacities.³³ Additionally, conflict and flooding, alongside deteriorating macroeconomic conditions, are anticipated to maintain high humanitarian assistance needs through May 2025, estimated at 13–14 million before the lean season begins in May.

In **Mali**, despite ongoing harvests, the Ménaka region remains in Crisis (IPC Phase 3) outcomes expected to deteriorate to Emergency (IPC Phase 4) starting in April, with a proportion of households in inaccessible areas projected to experience Catastrophe (IPC Phase 5) conditions.³⁴ In **Togo**, seasonal improvements in food insecurity have been recorded as new harvests have improved food supplies. However, Stressed (IPC Phase 2) outcomes are expected to persist in the Savannah regions through May 2025. In other parts of the country, Minimal (IPC Phase 1) outcomes are expected to prevail until the pre-lean season in April/May 2025, due to generally average harvests.

Prevalence of Insufficient Food Consumption

As of 31st October 2024, the number of people with insufficient food for consumption across seven selected West African countries stood at 163.4 million people, which is a decline of 7 million from 170.4 million in September (**Table 11**). This decrease came entirely from Nigeria, which experienced a 6.46% drop. The prevalence of insufficient food consumption in October 2024, however, remains above what was recorded in October 2023 (144.6 million people) and October 2022 (112.2 million people). In terms of changes in individual countries compared to the past year, Ghana and Togo experiencing the most surges at 52.73% and 42.11% respectively.

³² <https://fewsn.net/west-africa/burkina-faso>

³³ <https://fewsn.net/west-africa/nigeria>

³⁴ <https://fewsn.net/west-africa/mali>

Table 11: Prevalence of Insufficient Food Consumption in selected West African countries (October 2024)³⁵

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	●	0.00	●	-5.08	↘
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00	●	15.91	↑	8.51	↗
Ghana	29.80	8.40	8.40	28.19	0.00	●	52.73	↑	21.74	↑
Mali	19.10	13.20	13.20	69.11	0.00	●	0.00	●	-1.49	↘
Niger	25.90	21.40	21.40	82.63	0.00	●	0.94	↗	27.38	↑
Nigeria	202.80	101.40	108.40	50.00	-6.46	↘	16.28	↑	81.07	↑
Togo	7.90	2.70	2.70	34.18	0.00	●	42.11	↑	3.85	↗

*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%)

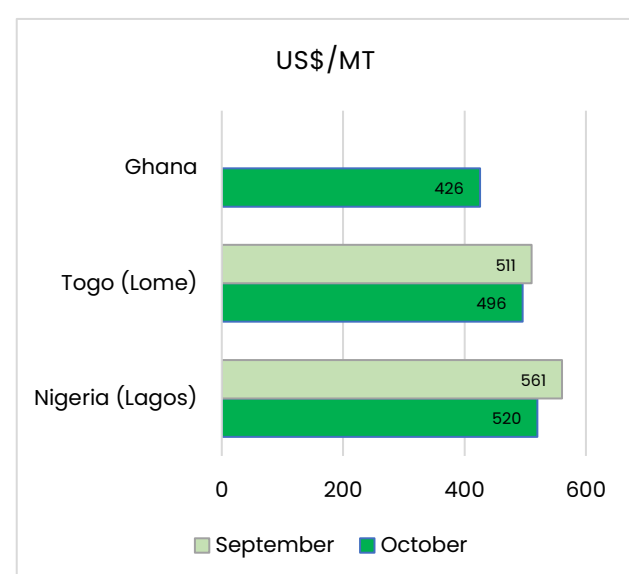
Commodity Prices

Key drivers of the price movements in West Africa include³⁶

	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 12: Price spreads for Maize across select West African Countries³⁷



Nigeria's (Lagos) maize price in USD dropped to USD 520, a 7% increase from the previous month, compared to Togo's (Lome) slight 3% price drop to USD 496 with Ghana having the lowest price amongst the selected countries, retailing at USD 426 (Figure 12).

However, the overall local maize prices in Nigeria and Togo (Table 12) show mixed trends with the majority of their markets showing price stability or decline month-on-month except for Nigeria's Maiduguri and Ibadan markets recording 5.98% and 7.04% modest increases respectively.

Despite this, prices in both countries remain significantly higher compared to **October 2023**, with increases ranging from **11.11% to 299.59%**, driven by a weak currency, high transport costs, and strong domestic demand resulting from below-average cereal production.³⁸

³⁵ Author's construction based on WFP HungerMap Live

³⁶ Fewsnat 2024

³⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

³⁸ FPMA <https://openknowledge.fao.org/server/api/core/bitstreams/cf6559b7-0ccd-49bd-bf0c-c3eb83bd78dc/content>

Table 12: Percentage Changes in maize prices in West Africa³⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Nigeria	Maize	Makarfi Market Centre, NGN/KG*	88,000.00	0.00 ●	7.32 ↑	54.39 ×	188.52 ×
Nigeria	Maize (white)	Giwa, NGN/KG**	858.25	3.87 ▲	57.96 ×	72.34 ×	238.23 ×
Nigeria	Maize (white)	Ibadan, NGN/KG**	950.00	7.04 ↑	43.94 ×	63.79 ×	242.34 ×
Nigeria	Maize (white)	Kano, NGN/KG**	844.43	0.92 ▲	30.46 ×	43.28 ×	241.32 ×
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	772.50	-11.36 ↓	19.66 ×	41.16 ×	222.36 ×
Nigeria	Maize (white)	Lagos, NGN/KG**	935.00	-0.95 ▾	42.88 ×	58.88 ×	252.56 ×
Nigeria	Maize (white)	Maiduguri, NGN/KG**	975.00	5.98 ↑	57.26 ×	77.27 ×	299.59 ×
Togo	Maize (white)	Amegnran, XOF/Kg*	280.00	0.00 ●	5.66 ↑	12.00 ↑	24.44 ×
Togo	Maize (white)	Anie, XOF/Kg*	280.00	3.70 ▲	9.80 ↑	12.00 ↑	30.23 ×
Togo	Maize (white)	Cinkassé, XOF/Kg*	275.00	1.85 ▲	5.77 ↑	10.00 ↑	22.22 ×
Togo	Maize (white)	Kara, XOF/Kg*	290.00	0.00 ●	5.45 ↑	11.54 ↑	0.00 ●
Togo	Maize (white)	Kor bongou, XOF/Kg*	270.00	0.00 ●	3.85 ▲	10.20 ↑	22.73 ×
Togo	Maize (white)	Lomé, XOF/Kg*	300.00	0.00 ●	3.45 ▲	11.52 ↑	11.11 ↑

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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 13: Price spreads for rice across select West African Countries⁴⁰

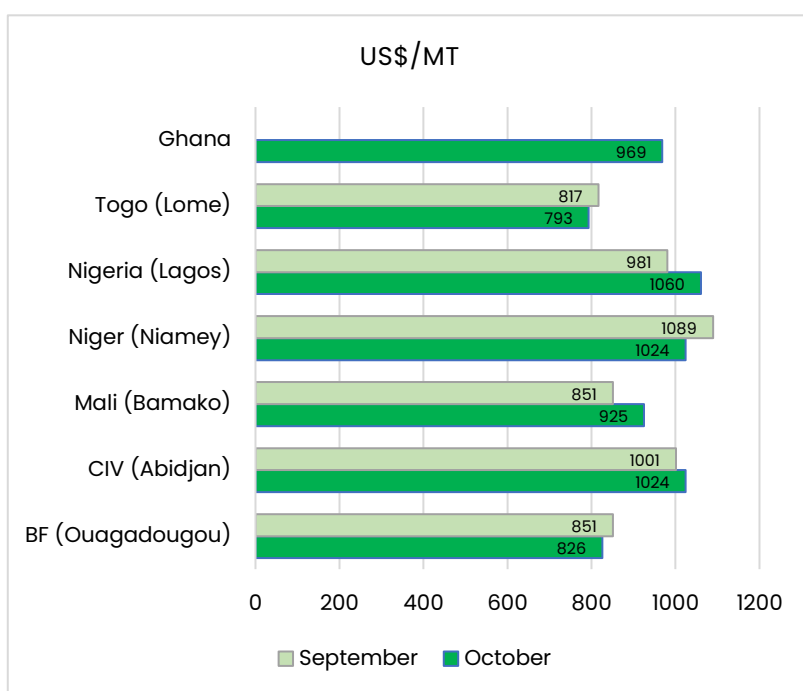


Figure 13 presents the price spread for rice across select West African countries, with Nigeria's Lagos market recording the highest price at USD 1060/Mt, which is 8% higher than the previous month. Notably, Togo's Lome market has the lowest price at USD 793/Mt attributed to monthly currency fluctuations. When price changes in local currencies are observed (**Table 13**), prices in majority of the markets show stability or slight increase except for Burkina Faso's Fada market with a 7.14% increase compared to the previous month. The current prices in all of Nigeria's markets are significantly high compared to October 2023 between 92.59% and 170.24% attributed to poor seasonal harvests. Ghana's rice price is amongst the highest in the region and the Monitor shall continue monitoring its trend in the coming months.

³⁹ Author's construction based on FAO data

⁴⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 13: Percentage Changes in rice prices in West Africa⁴¹

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	52,000.00	-3.70 ▾	-3.70 ▾	-5.45 ▾	15.56 ✖
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	7.14 ▲	7.14 ▲	7.14 ▲	7.14 ▲
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	50,000.00	0.00 ●	7.53 ▲	7.53 ▲	28.21 ✖
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg*	620.00	1.64 ▲	7.83 ▲	23.02 ✖	4.03 ▲
Cote d'Ivoire	Rice (imported)	Abidjan, Retail, XOF/Kg*	535.00	0.56 ▲	5.11 ▲	-7.92 ▾	6.57 ▲
Mali	Rice	Bamako, Wholesale, XOF/100 KG	56,000.00	12.00 ▲	16.67 ✖	24.44 ✖	21.74 ✖
Mali	Rice	Kayes, Wholesale, XOF/100 KG	60,000.00	37.93 ✖	15.38 ✖	15.38 ✖	20.00 ✖
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	55,000.00		19.57 ✖	17.02 ✖	15.79 ✖
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	51,000.00	-1.92 ▾	13.33 ▲	15.91 ✖	18.60 ✖
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	43,500.00	-19.44 ▾	0.00 ●	-3.33 ▾	8.75 ▲
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	50,000.00		11.11 ▲	4.17 ▲	25.00 ✖
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	640.00	0.00 ●	-12.33 ▾	6.67 ▲	6.67 ▲
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	640.00	-3.03 ▾	-13.51 ▾	3.23 ▲	6.67 ▲
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	620.00	-3.13 ▾	-13.89 ▾	3.33 ▲	-6.06 ▾
Nigeria	Rice	Makarfi Market Centre, NGN/KG*	52,000.00	-7.14 ▾	15.56 ✖	9.47 ▲	92.59 ✖
Nigeria	Rice (imported)	Lagos, NGN/KG**	1,636.00	0.06 ▲	149.24 ✖	10.99 ▲	102.68 ✖
Nigeria	Rice (milled)	Kano, NGN/KG**	1,597.09	-6.55 ▾	154.55 ✖	37.17 ✖	170.24 ✖
Togo	Rice (imported)	Amegnran, XOF/Kg*	500.00	0.00 ●	0.00 ●	2.04 ▲	-12.28 ▾
Togo	Rice (imported)	Cinkassé, XOF/Kg*	480.00	0.00 ●	0.00 ●	2.13 ▲	3.23 ▲
Togo	Rice (imported)	Kor bongou, XOF/Kg*	500.00	0.00 ●	2.04 ▲	2.04 ▲	-7.41 ▾
Togo	Rice (imported)	Lomé, XOF/Kg*	490.00	0.00 ●	2.08 ▲	2.08 ▲	0.00 ●

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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 14: Price spreads for Millet across select West African Countries⁴²

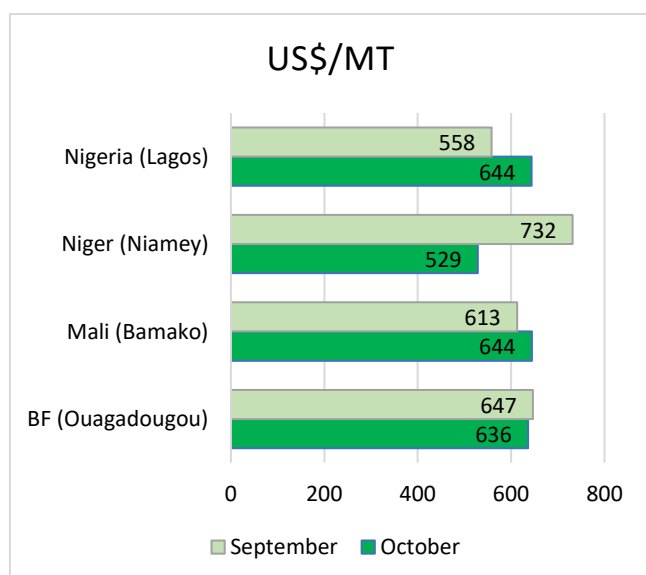


Figure 14 shows a mixed price trend in USD, with two of the select West African markets recording significant price changes month-on-month. Niger's Niamey market price records a 28% decrease at USD 529/Mt, while Nigeria's Lagos market hits a 15% spike at USD 644/Mt making it amongst the most expensive in region together with Bamako in Mali. Ongoing conflict-related market disruptions, as well as inadequate availabilities following production shortfalls⁴³ in the region continue to be among the contributing factors for high prices in the region. Similarly, changes in millet prices across all select West African countries (Table 14) show significant increases overall compared to the past 1-12 months, with the highest increase recorded in Nigeria (Maiduguri) at 298.19% and the lowest recorded in Burkina Faso (Bobo Dioulasso) at 7.04%. These increases are a direct reflection of poor seasonal harvests the region has faced, and the resulting implications on consumer retail prices.

⁴¹ Author's construction based on FAO data

⁴² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴³FPMA September 2024 <https://openknowledge.fao.org/server/api/core/bitstreams/95e45418-a221-480d-b41a-b66061ddc3cf/content>

Table 14: Percentage Changes in millet prices in select West African Countries⁴⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	38,000.00	0.00 ●	2.70 ▲	16.92 ☒	7.04 ↑
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	40,000.00	0.00 ●	25.00 ☒	45.45 ☒	53.85 ☒
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	47,500.00	0.00 ●	28.38 ☒	35.71 ☒	35.71 ☒
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	30,000.00	-10.45 ↓	7.14 ↑	7.14 ↑	11.11 ↑
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	38,500.00	1.32 ▲	13.24 ↑	35.09 ☒	40.00 ☒
Mali	Millet	Bamako, Wholesale, XOF/100 KG	39,000.00	8.33 ↑	41.82 ☒	56.00 ☒	62.50 ☒
Mali	Millet	Gao, Wholesale, XOF/100 KG	47,500.00	0.00 ●	26.67 ☒	46.15 ☒	53.23 ☒
Mali	Millet	Kayes, Wholesale, XOF/100 KG	40,000.00	0.00 ●	14.29 ↑	48.15 ☒	37.93 ☒
Mali	Millet	Mopti, Wholesale, XOF/100 KG	39,000.00	-2.50 ▾	34.48 ☒	41.82 ☒	65.96 ☒
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	40,000.00		45.45 ☒	60.00 ☒	110.53 ☒
Niger	Millet	Agadez, Wholesale, XOF/Kg	520.00	4.00 ▲	36.84 ☒	79.31 ☒	55.22 ☒
Niger	Millet	Dosso, Wholesale, XOF/Kg	400.00	-9.09 ↓	1.27 ▲	33.33 ☒	53.85 ☒
Niger	Millet	Maradi, Wholesale, XOF/Kg	255.00	-41.38 ↓	-35.44 ↓	-7.27 ↓	15.91 ☒
Niger	Millet	Niamey, Wholesale, XOF/Kg	320.00	-25.58 ↓	-20.00 ↓	1.59 ▲	16.36 ☒
Nigeria	Millet	Kano, NGN/KG**	863.20	1.50 ▲	-38.83 ↓	51.56 ☒	217.66 ☒
Nigeria	Millet	Kaura Namoda, NGN/KG**	806.50	-7.17 ↓	-42.72 ↓	51.53 ☒	223.74 ☒
Nigeria	Millet	Lagos, NGN/KG**	930.50	-1.38 ▾	-40.38 ↓	64.40 ☒	198.24 ☒
Nigeria	Millet	Maiduguri, NGN/KG**	987.50	7.92 ↑	-35.88 ↓	80.37 ☒	298.19 ☒
Nigeria	Millet	Makarfi Market Centre, NGN/KG*	103,000.00	7.85 ↑	27.16 ☒	77.59 ☒	182.19 ☒

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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 15: Price spreads for sorghum across select West African Countries⁴⁵

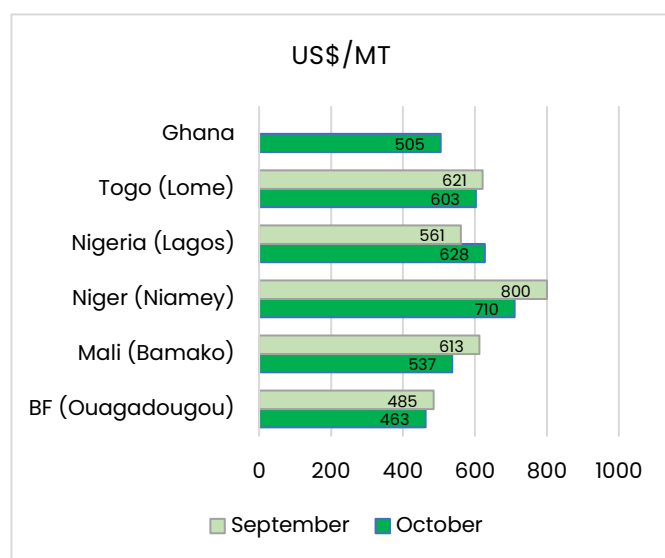


Figure 15 illustrates the price trends for Sorghum in the select West African countries, with majority of the markets current prices being lower than previous month, except Nigeria (Lagos) showing moderate price increase to USD 628/Mt, a 12% month-on-month increase. Although Niger (Niamey) price has recorded a modest price slump to USD 710/Mt, 11% month-on-month decrease, yet remains the most expensive Sorghum in the region. **Table 15** further highlights the ongoing food price crisis, with all select countries recording year-on-year soaring prices to the tune of 368.75% at Nigeria's Maiduguri market.

The only exception is **Togo**, where prices have risen by a more modest 21.51% compared to the previous year. These elevated prices are driven by high transport costs, conflict-related market disruptions, strong local demand, and currency fluctuations.

⁴⁴ Author's construction based on FAO data

⁴⁵ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 15: Percentage Changes in sorghum prices in select West African countries⁴⁶

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	0.00 ●	0.00 ●	8.70 ↑	11.11 ↑
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	37,500.00	0.00 ●	13.64 ↑	17.19 ×	25.00 ×
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	29,500.00	-10.61 ↓	9.26 ↑	13.46 ↑	20.41 ×
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	30,000.00	0.00 ●	20.00 ×	20.00 ×	33.33 ×
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	28,000.00	-1.75 ↘	-3.45 ↘	9.80 ↑	27.27 ×
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	32,500.00	-9.72 ↓	30.00 ×	35.42 ×	41.30 ×
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	35,000.00	0.00 ●	12.90 ↑	40.00 ×	59.09 ×
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	31,500.00	-1.56 ↘	16.67 ×	26.00 ×	36.96 ×
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	35,000.00	6.06 ↑	40.00 ×	66.67 ×	75.00 ×
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	30,000.00		20.00 ×	42.86 ×	50.00 ×
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	540.00	14.89 ↑	42.11 ×	86.21 ×	61.19 ×
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	375.00	-6.25 ↓	1.35 ▲	10.29 ↑	-1.32 ↘
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	320.00	-15.79 ↓	-18.99 ↓	23.08 ×	28.00 ×
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	430.00	-8.51 ↓	19.44 ×	53.57 ×	32.31 ×
Nigeria	Sorghum	Makarfi Market Centre, NGN/KG*	86,000.00	0.00 ●	16.22 ×	68.63 ×	70.30 ×
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	1,025.00	-3.53 ↘	50.93 ×	56.49 ×	266.07 ×
Nigeria	Sorghum (white)	Kaura Namoda, NGN/KG**	908.25	-1.44 ↘	52.41 ×	63.72 ×	256.79 ×
Nigeria	Sorghum (white)	Lagos, NGN/KG**	909.00	1.68 ▲	56.72 ×	56.19 ×	219.17 ×
Nigeria	Sorghum (white)	Maiduguri, NGN/KG**	975.00	14.71 ↑	72.57 ×	83.10 ×	368.75 ×
Togo	Sorghum	Anie, XOF/Kg*	320.00	-1.54 ↘	0.00 ●	6.67 ↑	3.23 ▲
Togo	Sorghum	Cinkassé, XOF/Kg*	310.00	0.00 ●	3.33 ▲	8.77 ↑	-1.59 ↘
Togo	Sorghum	Kara, XOF/Kg*	325.00	-1.52 ↘	1.56 ▲	4.84 ▲	-9.72 ↓
Togo	Sorghum	Kor bongou, XOF/Kg*	315.00	0.00 ●	5.00 ▲	8.62 ↑	-10.00 ↓
Togo	Sorghum	Lomé, XOF/Kg*	365.00	0.00 ●	1.39 ▲	4.29 ▲	-21.51 ↓

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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

Compared to October 2023, the prices of monitored fertiliser types across the selected West African countries show a general downward trend over the past 1-12 months. However, prices in Côte d'Ivoire have recorded a slight uptick (0-5%) in the range of 1.23% to 2.90% over the past month (Table 16). The current prices are significantly lower, particularly compared to a year ago, ranging from 8.42% to 25%. (Table 16).

Table 16: Percentage Changes in Fertiliser Prices in West Africa⁴⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG***	30.43	1.23 ▲	-12.78 ↓	-20.11 ↓	-25.29 ↓
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG***	33.30	2.90 ▲	-8.14 ↓	-13.57 ↓	-20.12 ↓
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG***	31.65	2.16 ▲	-1.59 ↘	-11.84 ↓	-20.04 ↓
Nigeria	NPK 15-15-15	National, USD/50KG***	29.65	-5.57 ↓	-17.34 ↓	-0.97 ↘	-14.03 ↓
Nigeria	NPK 20-10-10	National, USD/50KG***	24.73	-3.13 ↘	-14.96 ↓	-10.07 ↓	-20.46 ↓
Nigeria	Urea	National, USD/50KG***	22.42	-5.88 ↓	-19.09 ↓	-12.15 ↓	-8.42 ↓

Note: Last price is for October 2024, *September 2024, **August 2024, and ***July 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%)

Seasonal Monitor and Cropping Conditions

In **Burkina Faso**, national agricultural production is projected to exceed the five-year average. However, cereal prices are anticipated to remain above seasonal norms from October 2024 to May 2025, driven by the replenishment of public and private stocks, reduced imports, and higher-than-usual flows to Niger.⁴⁸ In **Ghana**, despite ongoing

⁴⁶ Author's construction based on FAO data

⁴⁷ Author's construction based on AfricaFertiliser.org

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

harvests the impact of drought conditions remains a concern in Ghana, where almost 50% of the country's cropland area has been impacted by poor germination and crop wilting and stunting, and many parts of the middle belt and north have experienced crop failures. In response to the prolonged dry spell impacting thousands of farmers in Northern Ghana, the Food and Agriculture Organization of the United Nations (FAO) and the European Union (EU) in partnership with the government, is implementing a series of measures to combat food insecurity and aid agricultural recovery in the region. Consequently, the FAO and EU provided 118,000 kg of maize seeds, 3,000 kg of sorghum foundation seeds, and 540 kg of millet foundation seeds to assist 12,600 smallholder farmers. Additionally, they supplied 1,560,000 kg of NPK fertilizer and 700,000 kg of urea fertilizers to enhance crop productivity.

In **Niger**, floods have impacted crops with nearly 14,000 hectares affected, more than 78% of which are in the Zinder region. Nonetheless, favourable water conditions are expected to minimise overall losses in the country. In **Nigeria**, main season harvests are ongoing although localised and heavy rainfall in lowland and riverine areas across the country has resulted in seasonal flooding which may affect crop output in these areas.⁴⁹ In **Mali**, harvests began in October and are expected to be average to below-average which will improve cereal availability in the country.⁵⁰ In **Togo**, average harvests are expected from the ongoing harvests which is expected to improve the country's food security situation.

⁴⁹ <https://fews.net/west-africa/nigeria>

⁵⁰ <https://fews.net/west-africa/mali>

Food Trade Updates

East Africa

Figure 16 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 16: East Africa Cross border trade updates August 2024



Tanzania

- Tanzania joined the Lobito Corridor linking the Indian Ocean to the Atlantic (The East African). The Lobito Corridor project, which connects four African countries, is ready for implementation after the US awarded a technical assistance grant for an environmental assessment study. A feasibility study and the signing of the concession agreement is also complete for the 780 km greenfield railway connecting the Lobito rail line in Luacano, Angola, to the existing railway line in Chingola, Zambia.

Southern Africa

Figure 17 below summarises some key activities and events recorded across Southern Africa impacting food trade activities.

Figure 17: Southern Africa Food Trade updates for October 2024



Zambia

- Zambia has officially joined the Central Corridor, which connects landlocked countries to the Indian Ocean via Tanzania, expanding the corridor's reach southward beyond the East African Community (EAC) bloc. Zambia, signed the formal agreement confirming full membership during a Council of Ministers meeting of the Central Corridor Transit Transport Facilitation Agency (CCTTFA) member countries in Kinshasa, Democratic Republic of Congo on 8th October 2024.

Zimbabwe

- Zimbabwe has submitted its provisional tariffs concession schedule to the African Continental Free Trade Area (AfCFTA) secretariat as the Government moves a gear up towards the full implementation of a raft of trade facilitation measures.

Malawi/Mozambique

- Malawi and Mozambique successfully concluded and signed the Simplified Trade Agreement (STR) framework between them. The framework which will ensure smooth participation of small-scale cross-border traders in regional trade was signed on 18th October 2024 in Lilongwe, Malawi.

West Africa

Figure 18 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 18: West Africa Cross Border Trade Updates October 2024



In a draft resolution during its Third Extraordinary Session in Lomé, Togo, the ECOWAS Parliament has urged Member States to ensure the effective application of the ECOWAS Protocol on the Free Movement of Persons and goods and on the right of residence; adopt and effectively implement clear and adequate sanction mechanisms against member states and officials who fail to implement the community text; Reconcile the need for free movement, trade facilitation, and public security requirements.⁵¹ ECOWAS has launched the Regional Competition Authority (ERCA) to streamline cross-border mergers. ERCA is now in its final stages of becoming fully operational, heralding a new era of competition law enforcement in the ECOWAS region.⁵²

At its 89th Ordinary Session, the ECOWAS Bank for Investment and Development (EBID) approved investments totaling EUR 61 million and USD 100 million to stimulate infrastructure, trade, and sustainable development sectors in West Africa.⁵³

⁵¹ <https://www.tv360nigeria.com/ecowas-parliament-moves-to-enforce-free-movement-protocol-right-of-residence/>

⁵² <https://www.bizcommunity.com/article/ecowas-launches-regional-competition-authority-to-streamline-cross-border-mergers-696231a>

⁵³ <https://www.ghanaweb.com/GhanaHomePage/business/EBID-approves-61m-100m-to-spur-trade-sustainable-development-in-West-Africa-1954480>

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