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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 53rd 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 November 2024 Food Security Monitor are summarised below:

Food Security Updates

Overall, **East Africa** continues to experience Emergency (IPC Phase 4), Crisis (IPC Phase 3), and Stressed (IPC Phase 2) conditions. In Kenya, Stressed (IPC Phase 2) outcomes are anticipated in pastoral and marginal agricultural areas through January. Meanwhile, in Uganda's bimodal regions, the ongoing Stressed (IPC Phase 2) conditions are expected to improve to Minimal (IPC Phase 1) outcomes from November 2024 through May 2025. In **Southern Africa**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) conditions continue to affect Malawi. In Mozambique, Crisis (IPC Phase 3) conditions are expected to persist in the southern, central, and northern regions due to ongoing conflicts, El Niño-induced drought, and the lean season. This food insecurity situation is likely to last until March 2025, with improvements anticipated as the new harvest begins in April/May 2025. Similarly, Zimbabwe is expected to experience Crisis (IPC Phase 3) conditions until May 2025 due to the lean season and last season's El Niño-induced drought. In West **Africa**, mixed trends are observed. Burkina Faso and Nigeria are mostly experiencing Crisis (IPC Phase 3) due to insecurity and macroeconomic challenges. Meanwhile, Niger and Mali are seeing Stressed (IPC Phase 2) and Minimal (IPC Phase 1) conditions, respectively, owing to seasonal improvements in household access to food and income, thanks to overall average harvests ensuring sufficient food availability.

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 Ethiopia and South Sudan where maize prices remain 1.76% and 165.84% higher than the past 1-12 months respectively. Although retail maize prices are cheapest in Tanzania at USD 266/MT, the prices have started to increase due to increase in export demand of maize from neighbouring countries and is expected to continue increasing to over USD 300/MT by early 2025. Rwanda has recorded 18% price increase of maize month-on-month, making it the most expensive maize (in USD terms) in the region due to stock depletion occasioned by delayed short rains (September-November). Kenya has the most expensive prices (in USD terms) for wheat, rice, and beans in the region because of inflationary pressures facing the country. Uganda's prices remained considerably low compared to the past 1-12 months, with Ethiopia's wheat prices being lower than the past 1-6 months associated with increased stocks from ongoing good meher season harvests.

In **Southern Africa**, the national average prices of maize in local currencies show a slight uptick compared to the past month underpinned by currency depreciation, higher transportation costs and limited forex availability. Although Zambia has maintained a stable currency, the country has been experiencing an incipient depreciation since mid-October which might heighten imported inflation trend and increased price of maize. Similarly, limited forex availability in Malawi has continued to impact prices of maize due to increase in the cost of importation of maize from neighbouring countries occasioned by the country's inability to purchase enough fuel to run the economy. The onset of the main rain seasons in the region is likely to offset the food shortage that impacted these countries this year.

In **West Africa**, the overall local prices of maize show a significantly upward trend compared to November 2023 between 11.11% and 117.63% occasioned by late-season flooding, weak currency, high transport costs and strong domestic demand resulting from below-average cereal production. When compared to the past 3, 6, and 12-month price levels in most monitored West African countries, the prices of rice, millet, and sorghum remain high with some signs of stability or declines shown over the past month due to the completion or near-completion of main-season cereal harvests in the region. Prices have been increasing in Nigeria mainly driven by the continued devaluation of the Naira, reduced domestic cereal production and high transport costs. With staple crop prices fetching high prices in Ghana, the United Nations World Food Programme (WFP), through financial contribution of USD 3.6 million contribution (over 58.3 million Ghanaian cedis) from the United States, and the United Kingdom, have provided emergency food and nutrition assistance to 70,000 drought-affected people in northern Ghana¹.

Food Trade Updates

- The Government of Zimbabwe has issued a total of 885 import permits to 423 private companies, contrary to the normal practice of private companies buying grain from the Grain Marketing Board (GMB). This is part of measures to ensure food security until the next harvest.
- The government of Ghana has extended its ban on export of key grains, including maize, rice, and soyabeans in response to critical supply challenges in the domestic market and is intended to ensure food security. The measure will be in place until the situation improves.
- Tanzania's National Food Reserve Authority (NFRA) has notified Zambia that it will stop maize supply due to the latter's failure to fulfil the contractual obligations agreed upon by both countries.²
- The U.S. plans to contribute another \$560 million in "new funding" to the Lobito Corridor Rail Project, which will bring total U.S. private and public investment in the corridor to more than \$4 billion. The initiative is expected to have a transformative impact on enhancing access to critical minerals needed for the clean energy transition and digital connectivity, strengthening food security, boosting regional trade, and empowering communities all along the Corridor.

¹ ReliefWeb <https://reliefweb.int/report/ghana/uk-us-and-wfp-partner-provide-lifesaving-assistance-70000-drought-affected-people-northern-ghana>

² <https://diggers.news/local/2024/12/06/tanzania-suspends-maize-supply-to-zambia-over-non>

payment/#:~:text=TANZANIA'S%20National%20Food%20Reserve%20Agency,fulfill%20contractual%20obligations%20regarding%20payment.

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)³, snapshots of hunger hotspots and average changes in food prices⁴ over the past year. Figure 1 displays the prevalence of IFC in November 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%), and Niger (82.6%). Nigeria has improved from a hotspot status from the previous month but still close at 49.1%, in the same category as South Sudan (44.5%) and Uganda (42.2%). Apart from Nigeria, Zimbabwe has also seen 12.07% drop in the number of people with IFC in November compared to October, with the remaining countries having no change. Compared to a year ago, most countries have had surges in the number of people with IFC except Kenya, Mozambique, Niger, and Zambia where it declined, as well as Mali and Zimbabwe where it remained stable.

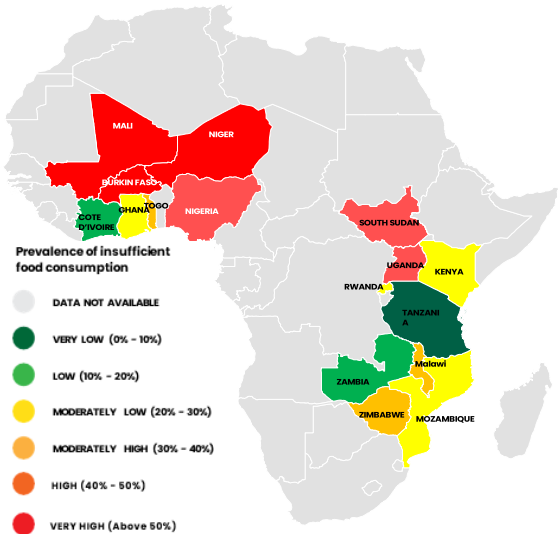
In the past six months, only Uganda, Zambia, and Zimbabwe have seen a decline in the average national prices (in local currencies) of maize and rice. However, compared to a year ago, maize prices declined in four East African countries monitored (Kenya, Rwanda, Tanzania and Uganda) due to increased availability of supplies from harvest but increased in all the Southern and West African countries as well as in Ethiopia.

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	1.82	9.80	17.15
Cote d'Ivoire	0.00	6.25	6.63	6.63
Ethiopia			1.95	1.76
Ghana	0.00	55.56		
Kenya	0.00	-4.23	3.69	-66.26
Malawi	0.00	47.83	11.80	11.64
Mali*	0.00	0.00	4.11	8.95
Mozambique	0.00	-9.52		
Niger	0.00	-2.73	0.03	2.97
Nigeria	-1.78	10.42	47.64	88.39
Rwanda	0.00	2.86	62.20	-6.35
South Sudan	0.00	48.48	60.92	165.84
Tanzania	0.00	10.64	40.00	-20.36
Togo	0.00	42.11	11.21	18.46
Uganda	0.00	116.87	-0.97	-25.68
Zambia	0.00	-17.50	-2.70	26.21
Zimbabwe	-12.07	0.00	-1.48	93.68

Key: ● No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, September 2024



³ 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).

⁴ 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) went up marginally by 0.5% in November 2024 from 127.4 points in October 2024, which is the highest since April 2023.⁵ This increase was driven by higher price quotations for dairy products and vegetable oils resulting in 0.6% and 7.5% increase in these sub-indices respectively, which was counterbalanced by declines in the meat, cereals, and sugar quotations. Weaker international demands, downward pressure on prices stemming from generally favourable weather in South America, and seasonal pressure from the ongoing harvest in the United States of America are driving lower cereal prices.⁶ The International Grain Council's (IGC) Grain and Oil Index (GOI) and all its selected sub-indices show decline compared to the past one month and a year ago. The GOI declined by 2% compared to the previous month and 14.7% compared to October 2023 respectively. The sub-indices of wheat, rice, and soyabeans also saw moderate declines by 10.59%, 16.15% and 19.92% respectively compared the previous year.

Figure 2: FAO Food Price Index (FFPI)



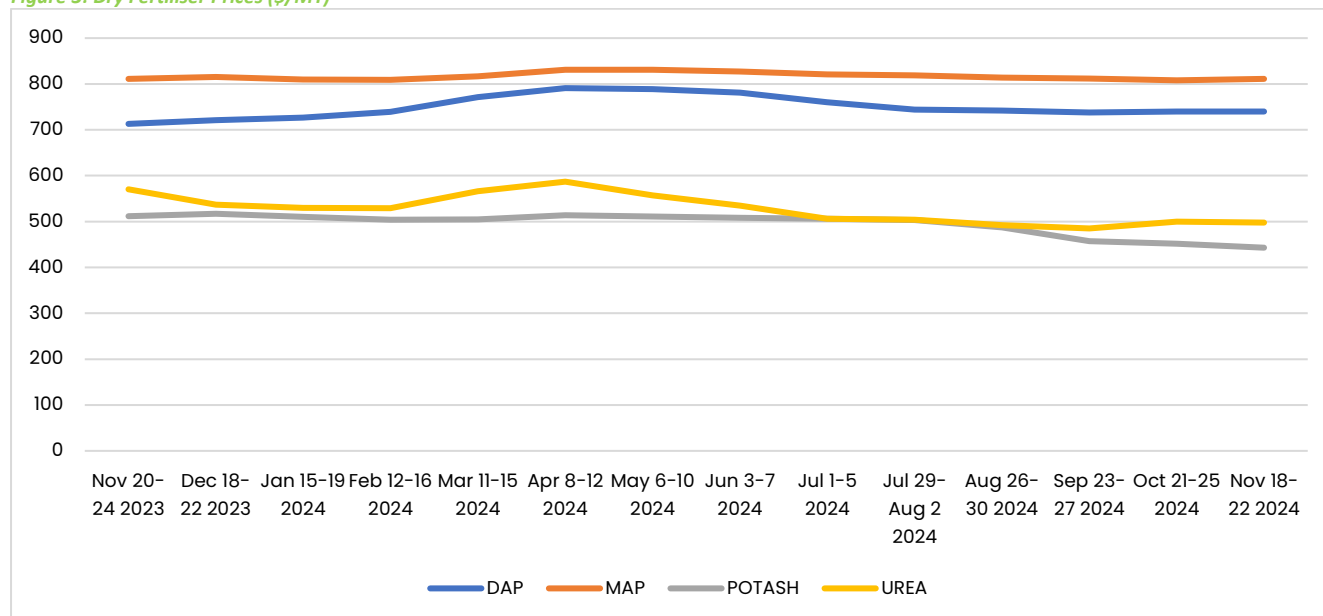
Table 2: IGC GOI Commodity Price Indices

Jan 2000 = 100	29-Nov	% Change 1M	% Change 1Y
GOI	220.38	-2.05	-14.73
Wheat	198.79	-2.71	-10.59
Maize	220.50	-	-4.49
Rice	212.70	-0.52	-16.15
Soyabeans	208.99	-2.39	-19.92
Barley	214.80	-	-2.39

Global Fertiliser Prices

Mixed trends are observed for the monitored fertiliser types (Figure 3) over the past one month and a year ago. Whereas low to moderate declines are observed for Potash and urea, less than 2% compared to the previous month and 13.5% and 12.6% respectively compared to a year ago, the price of DAP is 3.8% higher than a year ago, while the price of MAP remains generally stable.

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



Source: Author's construction based on DTN⁷

⁵ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

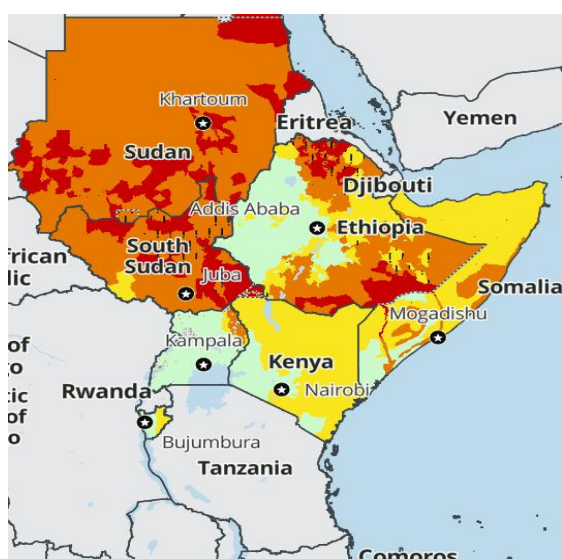
⁶ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁷ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2024/11/27/retail-fertilizer-prices-higher>

East Africa Food Insecurity Updates

Food Security Outlook

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



In **Ethiopia**, Emergency (IPC Phase 4) outcomes are expected through at least May in hard-to-reach areas of Tigray, and in pastoral areas of Zone 2 and Zone 4 of Afar that were severely impacted by the 2020-2022 conflict in northern Ethiopia.⁸ However, Crisis (IPC Phase 3) outcomes persist in the rest of the country due to the near-average national *meher* harvest and favourable consecutive livestock production seasons. In **Kenya**, Crisis (IPC Phase 3) outcomes are expected in Makueni and Kitui counties as well as in the pastoral areas of Turkana, Marsabit, and Garissa counties through at least May due to below-average short rains and in the absence of typical food stocks.⁹ However, across the rest of the pastoral and marginal agricultural areas, Stressed (IPC Phase 2) outcomes are expected through January.

In **South Sudan**, 12 counties are estimated to be in Emergency (IPC Phase 4) conditions while some households in Malakal of Upper Nile, Abyei, and among returnees are facing Catastrophe (IPC Phase 5) outcomes due to the impact of a record year of flooding, sporadic conflicts, high returnee and refugee burden, and severe macroeconomic deterioration.¹⁰ In **Uganda**, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) outcomes are expected to persist in most refugee settlements and in Karamoja areas through May 2025.¹¹ However, in bimodal areas, the ongoing Stressed (IPC Phase 2) outcomes is expected to improve to Minimal (IPC Phase 1) outcomes from November 2024 through May 2025.

Prevalence of Insufficient Food Consumption

The number of people with sufficient food for consumption across five selected East African countries, as of 30th November 2024, did not change from the previous month, standing at 45.3 million. However, this state of food insecurity across the select countries is higher than what it was in November 2023 (34 million) and November 2022 (41.9 million), indicating a deteriorated food insecurity situation compared to the past one year and two years. Over the past one year, all monitored East African countries have contributed to the situation except Kenya, with South Sudan and Uganda being the most contributors by 48.48% and 116.87% respectively.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (November 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	-4.23	36.00
Rwanda	12.30	3.60	3.60	29.27	0.00	2.86	16.13
South Sudan	11.00	4.90	4.90	44.55	0.00	48.48	-26.87
Tanzania	56.30	5.20	5.20	9.24	0.00	10.64	-25.71
Uganda	42.70	18.00	18.00	42.15	0.00	116.87	19.21

*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%)

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

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

¹⁰ <https://fews.net/east-africa/south-sudan>

¹¹ <https://fews.net/east-africa/uganda>

¹² Author's construction based on WFP HungerMap

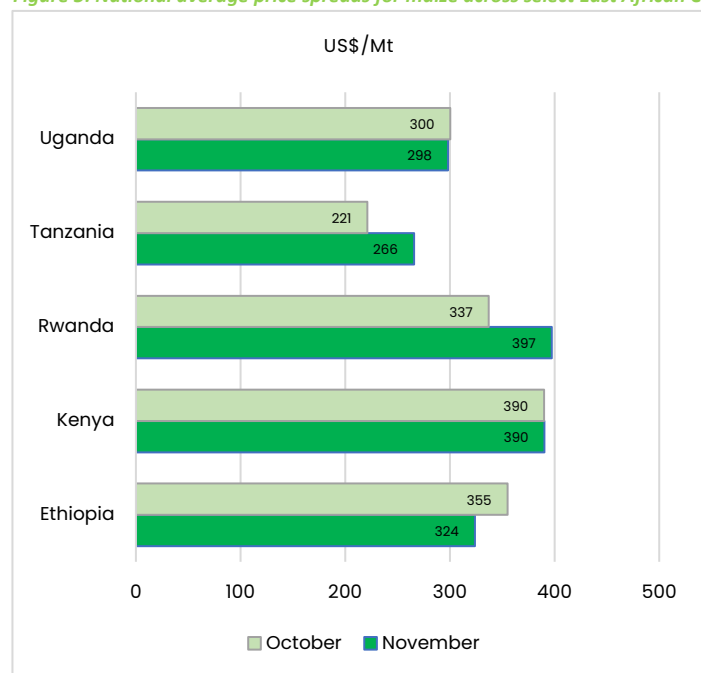
Commodity Prices

Key drivers of commodity prices in EA¹³

	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 Countries¹⁴



The price spread for maize (in USD) across five East African countries (Figure 5) shows that the highest maize price in the region is in Rwanda at USD 397/MT, while the lowest is in Tanzania at USD266/MT. Notably, both Tanzania and Rwanda saw maize prices increase by 20% and 18% respectively in November compared to October, with the former attributed by the logistical costs occasioned by the onset of the rainy season in, coupled with an increase in export demand of maize from neighbouring countries and is expected to continue increasing to over USD 300/MT by early 2025¹⁵; while the latter is mainly due to stock depletion occasioned by delayed onset of the short rains. Kenya price remained stable attributed by sustained maize imports from Uganda and Tanzania¹⁶. This trend is further confirmed by local currency price changes (Table 4), with Rwanda, South Sudan, and Tanzania experiencing significant increases in maize prices over the past 1-6 months. In Rwanda, maize prices have risen by 19-62%, while in Tanzania they have increased by 16-40%, and South Sudan prices rose by 18-165% underpinned by tight supplies and severe macroeconomic difficulties. Conversely, Ethiopia has seen its national average maize prices decline by 6.19% over the past month and 4.25% over the past three months due to traders' released stocks in advance of the main *meher* harvest. Uganda has experienced only a slight increase in maize prices (less than 3%), but prices remain 25.68% lower than they were a year ago.

Table 4: Percentage changes in maize prices in East Africa¹⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	3,998.89	-6.19 ↓	-4.25 ↘	1.95 ▲	1.76 ▲
Kenya	Maize	National Average, Retail, KES/KG	50.22	0.72 ▲	-11.91 ↓	3.69 ▲	-66.26 ↓
Rwanda	Maize	National Average, Retail, RWF/Kg	543.26	19.84 ×	33.33 ×	62.20 ×	-6.35 ↓
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	1,998.43	-4.27 ↘	18.21 ×	60.92 ×	165.84 ×
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	70,000.00	16.67 ×	16.67 ×	40.00 ×	-20.36 ↓
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,277.10	-14.47 ↓	-0.47 ↘	-19.34 ↓	-25.46 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,126.20	2.97 ▲	2.77 ▲	-0.97 ↘	-25.68 ↓

Note: Last price is for November 2024, * October 2024, ** September 2024, and *** August 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 FEWS NET, 2024

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

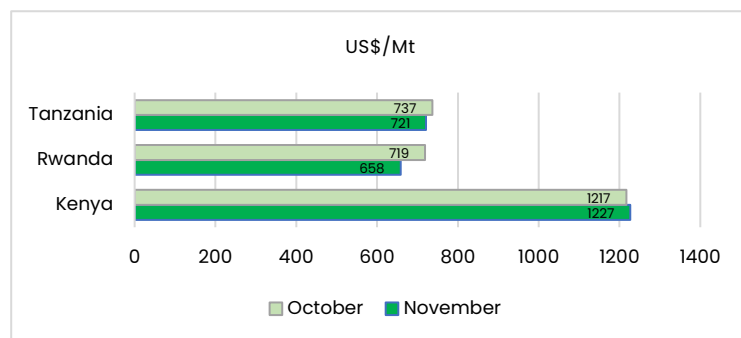
¹⁵ Agri Intelligence Africa <https://www.youtube.com/watch?v=AdVuYbOVAYU>

¹⁶ FPMA November Bulletin [Food Price Monitoring and Analysis \(FPMA\) Bulletin #9, 13 November 2024](https://www.foma.org/food-price-monitoring-and-analysis-fpma-bulletin-9-13-november-2024)

¹⁷ 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 Countries¹⁸



The price spread (in USD) for rice between Tanzania, Rwanda, and Kenya (Figure 6) shows that rice is most expensive in Kenya at USD 1,227/MT and lowest in Rwanda at USD 658/MT. Prices in Tanzania have slightly decreased due to stock release by traders as both *vuli* and main season rains commence in the country and having fetched significant price leap in October. However, local currency prices indicate declining trends in Rwanda and Tanzania, while Kenya shows low to moderate increases (Table 5). In Rwanda, rice prices have fallen by 20.88% and 24.82% over the past 6 and 12 months, respectively. Similarly, Tanzania has seen significant declines in rice prices by 9.52% and 28.84% compared to the past 6 and 12 months.

Table 5: Percentage changes in rice prices in East Africa¹⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	157.88	1.50 ▲	2.29 ▲	6.05 ↑	6.80 ↑
Rwanda	Rice	National Average, Retail, RWF/Kg	900.00	-6.90 ↓	-15.00 ↓	-20.88 ↓	-24.82 ↓
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	190,000.00	-5.00 ●	0.00 ●	-9.52 ↓	-28.84 ↓

Note: Last price is for November 2024, * October 2024, ** September 2024, and ***August 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 Countries²⁰

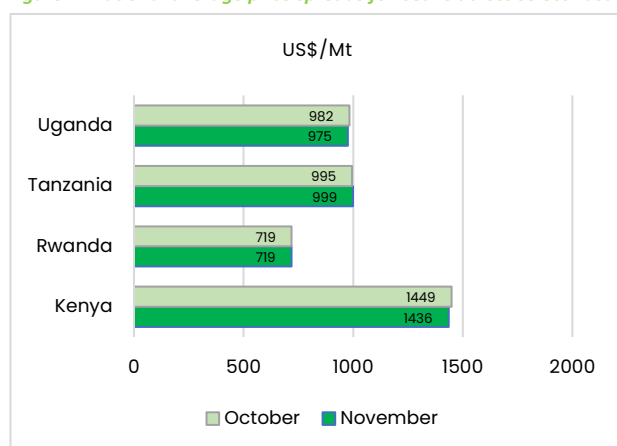


Figure 7 shows price trends of beans in USD from four select East African countries. Overall, the prices have remained stable or slightly decreased in the region following good green harvests and stock maintenance. Both Uganda and Kenya have seen a decrease in bean prices to USD 975/MT and USD 1,436/MT, with Rwanda maintaining the lowest retail price in the region at USD 719. Notably, Tanzania retail price has slightly upticked at USD 999/MT signifying depletion of stock and onset of the rainy season in the country impacting sourcing of commodities. Kenya remains the country with the most expensive bean prices in the region, with Tanzania the second by-far. The changes in prices in local currencies as shown in Table 6 also depict a similar picture as demonstrated above, however, when compared to November 2023 prices, the current prices in Kenya, Tanzania and Uganda are lower by 25.06%, 2.66% and 9.57% respectively, with Rwanda price being extremely high compared to past 1-6 months by 69.50%.

Table 6: Percentage changes in beans prices in East Africa²¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	184.83	-0.22 ▾	4.42 ▲	5.06 ↑	-25.06 ↓
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	136.28	-2.28 ▾	3.66 ▲	-30.49 ↓	-8.81 ↓
Rwanda	Beans	National Average, Retail, RWF/Kg	983.10	1.60 ▲	13.54 ↑	69.50 ☒	8.29 ↑
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	263,300.00	-2.48 ▾	5.32 ↑	1.27 ▲	-2.66 ▾
Uganda	Beans	National Average, Retail, UGX/Kg*	3,884.66	8.61 ↑	2.93 ▲	13.82 ↑	-9.57 ↓

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

¹⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁹ Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania

²⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²¹ 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

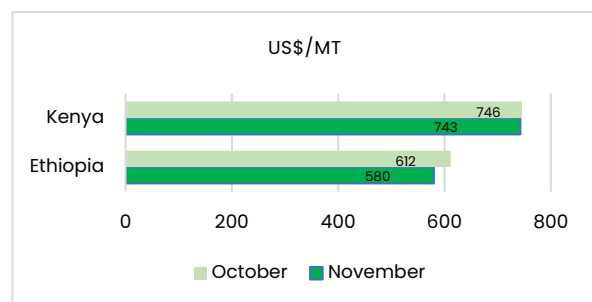


Figure 8 shows the decline in wheat prices in USD in two selected East African countries, Kenya and Ethiopia at USD 743/MT and USD 580/MT respectively. This translates to month-on-month price decreases of 0.5% in Kenya and 5.4% in Ethiopia. On the other hand, the local currency prices (Table 7) were lower in Ethiopia compared to the past 1-6 months with decreases ranging between 0.71% and 2.57% attributed to ongoing good *meher* season harvests leading to above-average stocks to supply and meet the existing demand,²². While Kenya's current wheat price is 10.66% and 52.85% higher compared to the past 6 and 12 months, the price has shown stability in the past 1–3 months, with slight increase of 0.26% and decrease of 10.11%, respectively, during the same period.

Table 7: Percentage changes in wheat prices in East Africa²³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	7,165.56	-2.41 ↘	-2.57 ↘	-0.71 ↘	3.16 ▲
Kenya	Wheat	National Average, Retail, KES/KG	95.57	0.26 ▲	-10.11 ↘	10.66 ↑	52.85 ✖

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

Fertiliser prices in Kenya and Rwanda remain all time low compared to the past 1-12 months due to low off-season demand (Table 8). In Kenya the prices of CAN and DAP have declined significantly by between 9% and 61% compared to the past 6- and 12-month levels. In Rwanda, the prices of all monitored fertiliser types are about 6% and 10% above their 6 month and 12-month levels respectively. The COMESA Competition Commission has identified the two largest fertilizer suppliers in the region for exploiting their dominant market position. They have been accused of inflating prices and unfairly raising product mark-ups by up to 142% above international prices, significantly driving up the cost of agricultural production in Kenya²⁴.

Table 8: Percentage changes in fertiliser prices in East Africa²⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	79.32	-13.23 ↘	-9.39 ↘	-61.82 ↘	-50.76 ↘
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	104.09	-13.70 ↘	-34.84 ↘	-9.74 ↘	-49.80 ↘
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	86.21	-9.88 ↘	-12.59 ↘	-13.12 ↘	-18.62 ↘
Rwanda	DAP	National Average USD/50KG*	903.00	-1.21 ↘	-3.33 ↘	-5.86 ↘	-10.39 ↘
Rwanda	NPK 17-17-17	National Average USD/50KG*	902.00	-1.22 ↘	-3.33 ↘	-6.24 ↘	-10.78 ↘
Rwanda	Urea	National Average USD/50KG*	901.00	-1.23 ↘	-3.34 ↘	-5.94 ↘	-10.38 ↘

Note: Last price is for November 2024, * October 2024, ** September 2024, and ***August 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 **Ethiopia**, the October to December *deyr/hageya* rains performed poorly in October in the pastoral south and southeast. However, across the rest of Ethiopia, the near-average national *meher* harvest and favourable consecutive livestock production seasons are resulting in moderate improvements in acute food insecurity outcomes.²⁶ In **South Sudan**, despite the beginning of the main harvesting period in October, acute food security situation remains severe due to several reasons including sporadic conflicts, high returnee and refugee burden, and severe macroeconomic deterioration.²⁷ In **Tanzania** maize in the bimodal areas are in vegetative to reproductive stage, with some concern over delayed *vuli* seasonal rains in some dry areas. Meanwhile planting of *msimu* season cereals is just beginning in unimodal areas of the country. In **Kenya**, following the average to above-average rainfalls harvesting of long rains cereals has been completed under favourable conditions²⁸. Meanwhile, in the bimodal and minor producing areas planting of short rain cereals commenced with below-average October–December (OND) short rains

²² GIEWS Ethiopia Country Brief <https://www.fao.org/giews/countrybrief/country.jsp?code=ETH&lang=fr>

²³ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

²⁴ Business Daily <https://www.businessdailyafrica.com/bd/markets/commodities/comesa-watchdog-flags-two-kenyan-fertiliser-firms-price-gouging-4833124>

²⁵ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya; 3) AFAP for Uganda

²⁶ <https://fews.net/east-africa/ethiopia>

²⁷ <https://fews.net/east-africa/south-sudan>

²⁸ <https://www.cropmonitor.org/crop-monitor-for-early-warning>

recorded signifying a potential drop in the harvests from this season.²⁹ In **Uganda**, harvesting of first season maize ended under favourable conditions³⁰ while below-average first season crop production has been recorded in bimodal areas, with below-average start of the second season rains also recorded which will likely cause localised disruptions to crop production.³¹ East Africa has seen a favorable rainfall distribution this month, with moderate to locally heavy rainfall received in the region. Media reports indicate that heavy rainfall triggered landslides, causing fatalities in eastern Uganda³².

²⁹ <https://fews.net/east-africa/kenya>

³⁰ <https://www.cropmonitor.org/crop-monitor-for-early-warning>

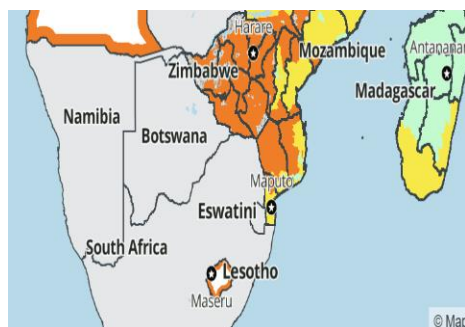
³¹ <https://fews.net/east-africa/uganda>

³² CPC https://www.cpc.ncep.noaa.gov/products/international/africa/africa_hazard.pdf

Southern Africa Food Security Update

Food Security Outlook

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



Overall, Crisis (IPC Phase 3) and Stressed (IPC Phase 2) conditions persist in **Malawi**, especially in parts of the southern and central regions, which is expected to last till May 2025. In **Mozambique**, Crisis (IPC Phase 3) conditions are anticipated to continue in the southern, central, and northern regions due to ongoing conflicts, El Niño-induced drought, and the lean season. This level of food insecurity is expected to last until March 2025, with improvements likely as the new harvest begins from April/May 2025. Similarly, Crisis (IPC Phase 3) conditions are expected to remain across **Zimbabwe** till May 2025 as the impact of the lean season and last season's El Niño-induced drought.³³

Prevalence of Insufficient Food Consumption

As of 30th November 2024, the number of people with insufficient food for consumption across four selected Southern African countries had gone down from 23.5 million people in October to 22.8 million, indicative of improvement in the food insecurity situation in the region driven mainly by Zimbabwe with a 12% decline (see **Table 9**). However, this level of food insecurity remains higher than it was in November 2023 (22.1 million) and November 2022 (19.7 million). Compared to a year ago, only Malawi registered a significant increase of 47.83% in the number of people with insufficient food for consumption, standing at 6.8 million against a total population of 18.1 million people. Mozambique and Zambia, on the other hand, have had 9.52% and 17.5% decline, whereas Zimbabwe experienced no change.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (November 2024)³⁴

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	47.83	88.89
Mozambique	29.50	7.60	7.60	25.76	0.00	-9.52	-3.80
Zambia	17.40	3.30	3.30	18.97	0.00	-17.50	37.50
Zimbabwe	15.20	5.10	5.80	33.55	-12.07	0.00	-12.07

*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.

³³ <https://fews.net/southern-africa/zimbabwe>

³⁴ Author's construction based on HungerMap

Figure 10: National average price spreads for maize across select Southern African Countries³⁵

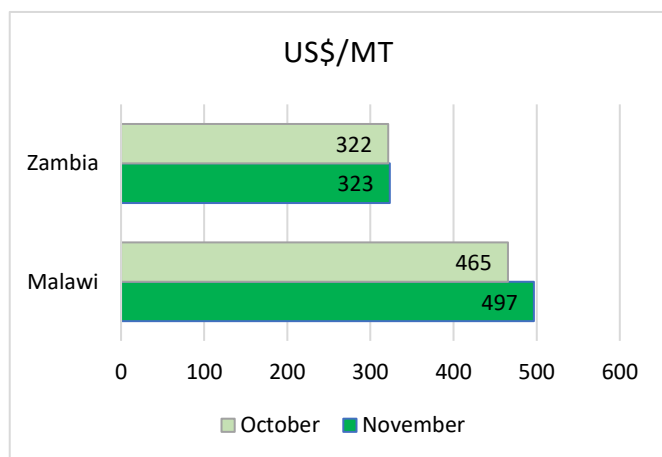


Figure 10 presents the price in USD from Zambia and Malawi, with the latter having a price increase of 7% month-on-month attributed to the ongoing fuel shortage crisis, resulting from limited availability of forex, which adds up to the transportation costs associated with sourcing maize from neighbouring countries like Tanzania. Although faced by ongoing power crisis, prices in Zambia in USD have remained stable due to currency stability although it is reported that the country has been experiencing an incipient depreciation since mid-October that might heighten imported inflation³⁶. It is further reported that out of the 650,000MT contract entered between Governments of Tanzania and Zambia, no more than 30,000MT have been delivered to Zambia, with supply, funding, administration and logistics cited as among the main stumbling blocks³⁷.

As illustrated in Table 10 below, the current prices of maize in local currencies for Malawi, Zambia and Zimbabwe are low to extremely high ranging from 1.06% to 93.68% respectively compared to the past 1-12

months. All countries have a slight uptick in maize grain price in November, pushing prices up by 0.59% (Malawi), 1.98% (Zambia) and 0.59% (Zimbabwe). 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 4.67% and 93.68%. This situation is being felt by these countries due to poor main season harvests this year.

Table 10: Percentage changes in select commodity prices in Southern Africa³⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Cassava	Mzuzu, MWK/Kg*	1,812.50	0.69 ▲	0.69 ▲	8.02 ↑	42.05 ⊗
Malawi	Maize	Lilongwe, MWK/Kg**	743.33			-17.41 ↓	6.19 ↑
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 ⊗
Malawi	Rice	Lilongwe, MWK/Kg*	2,133.33			6.67 ↑	33.33 ⊗
Malawi	Rice	Mzuzu, MWK/Kg*	1,856.25	3.13 ▲	-2.94 ▾	-0.20 ▾	4.87 ▲
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	8.72	1.98 ▲	3.24 ▲	-2.70 ▾	26.21 ⊗
Zambia	NPK 10-20-10 + 6S	National, ZMW/50KG**	957.00	-2.43 ▾	-2.43 ▾	-5.90 ↓	18.64 ⊗
Zambia	Urea	National, ZMW/50KG**	944.00	-2.11 ▾	-2.11 ▾	-6.44 ↓	13.23 ↑
Zimbabwe	Maize (white)	National Average, Retail, USD/Kg*	0.57	0.59 ▲	3.94 ▲	-1.48 ▾	93.68 ⊗

Note: Last price is for November 2024, * October 2024, ** September 2024, and ***August 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 general, the agricultural season has begun in the southern Africa region with a forecast of average to above-average rainfall and expected timely onset of rainfall across the region.³⁹ Most households have already started land preparations for the upcoming planting period. This is improving access to labour opportunities for poor households after a long dry season. Weather forecasts indicate that Northern parts of Zambia will record above average and heavy rainfall this main season which may result in isolated rain-floods.

³⁵ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

³⁶ FPMA November Bulletin [Food Price Monitoring and Analysis \(FPMA\) Bulletin #9](https://www.foma.org/food-price-monitoring-and-analysis-fpma-bulletin-#9), 13 November 2024

³⁷ Agri Intelligence Africa <https://www.youtube.com/watch?v=AdVuYbOVAYU>

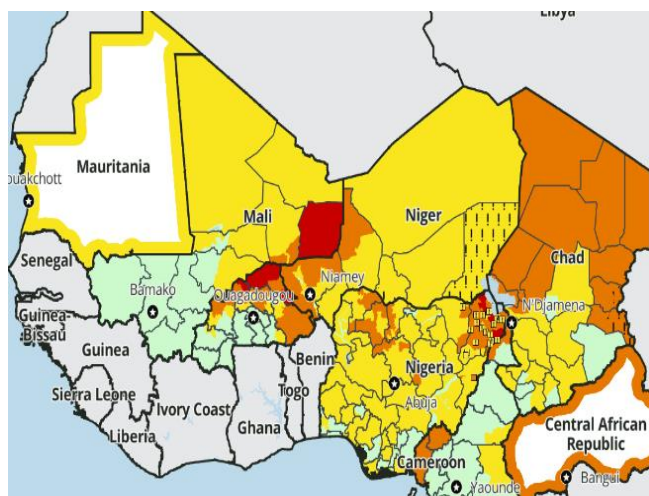
³⁸ Author's construction based on FAO data

³⁹ <https://fews.net/southern-africa>

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) outcomes remain in Djibo and communes with high security challenges and a high presence of displaced persons, such as Titao, Arbinda, Gorom-Gorom, Markoye, Sebba, Diapaga.⁴⁰ Supplies from coastal countries such as Ghana and Benin are declining due to production declines or restrictive measures taken by these countries, which is further worsening the food insecurity situation. In **Niger**, Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes are expected in agricultural, agropastoral, and pastoral areas through May 2025 supported by new harvests and improvement in animal conditions and milk production.⁴¹ However, Crisis (IPC Phase 3) outcomes are predicted through to May 2025 in the regions of Tillabéry and Diffa, northwest of Tahoua, and southwest of Maradi due to conflict and insecurity.

In **Nigeria**, widespread Crisis (IPC Phase 3) outcomes are expected to persist across conflict-affected parts of North East, North West, and North Central Nigeria.⁴² In **Mali**, seasonal improvement in household access to food and income due to overall average harvests resulting in sufficient food availability in the country during the 2024/25 food year is supporting

Minimal (IPC Phase 1) and Stressed (IPC Phase 2) outcomes.⁴³ However, in the Ménaka region, Crisis (IPC Phase 3) food insecurity outcomes, which will deteriorate early to Emergency (IPC Phase 4) from April with a small proportion of populations in Catastrophe (IPC Phase 5) outcomes are expected in inaccessible areas due to supply chain disruptions and insecurity.

Prevalence of Insufficient Food Consumption

As of 30th November 2024, the number of people with insufficient food for consumption across seven selected West African countries had declined by 1.8 million people from 163.4 million people in October to 161.6 million people in November, solely led by a 1.78% decline in Nigeria (Table 11). The prevalence of insufficient food consumption in November 2024, however, remains above what was recorded in November 2023 (113.42 million people) and November 2022 (113.5 million people). In terms of changes in individual countries compared to the past year, most countries have experienced increases except Mali and Niger, with Ghana and Togo experiencing the most surges at 55.56% and 42.11% respectively.

Table 11: Prevalence of Insufficient Food Consumption in selected West African countries (November 2024)⁴⁴

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	1.82	0.00
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00	6.25	6.25
Ghana	29.80	8.40	8.40	28.19	0.00	55.56	18.31
Mali	19.10	13.20	13.20	69.11	0.00	0.00	2.33
Niger	25.90	21.40	21.40	82.63	0.00	-2.73	15.68
Nigeria	202.80	99.60	101.40	49.11	-1.78	10.42	76.60
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%)

⁴⁰ <https://fews.net/west-africa/burkina-faso>

⁴¹ <https://fews.net/west-africa/niger>

⁴² <https://fews.net/west-africa/nigeria>

⁴³ <https://fews.net/west-africa/mali>

⁴⁴ Author's construction based on WFP HungerMap Live

Commodity Prices

Key drivers of the price movements in West Africa include⁴⁵

	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 Countries⁴⁶

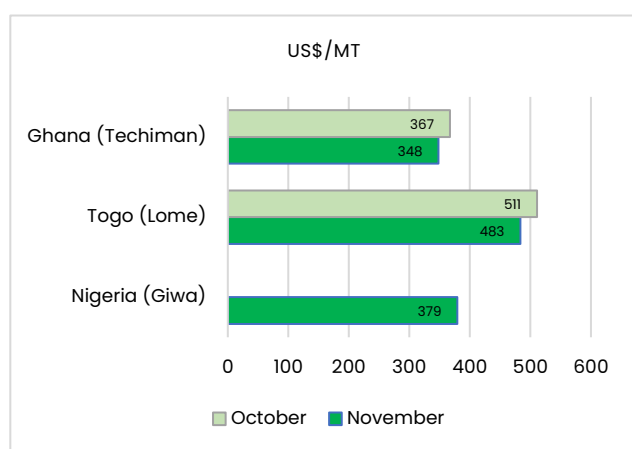


Figure 12 presents the price spread of maize across three West African countries, which shows that the price of maize is cheapest at USD 348/MT in Techiman, one of Ghana's major maize producing areas than in Giwa and Lome, with Lome being the most expensive at USD 483/MT. However, the changes in local prices in Nigeria and Togo (Table 12), generally show stable or low (0-5%) increases over the previous month, except in Maiduguri where the current price is 5.38% above the previous month's level. Maize prices (in local currencies) in both countries, however, remain well above what they were 3-12 months ago, with select markets in Nigeria recording 34-117% above their 6 and 12months' levels. Inflationary pressures, insecurity in northern Nigeria, and early dry spells and late-season flooding negatively impacted the main-season production.

Table 12: Percentage changes in maize prices in West Africa⁴⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Nigeria	Maize	Makarfi Market Centre, NGN/KG*	1,630.40	-0.56 ▾	4.81 ▲	41.55 ☒	117.63 ☒
Nigeria	Maize (white)	Giwa, NGN/KG**	809.60	1.27 ▲	8.26 ↑	66.63 ☒	88.04 ☒
Nigeria	Maize (white)	Ibadan, NGN/KG**	891.73	3.09 ▲	19.46 ☒	74.56 ☒	59.24 ☒
Nigeria	Maize (white)	Kano, NGN/KG**	1,059.60	0.00 ●	19.79 ☒	62.06 ☒	52.77 ☒
Nigeria	Maize (white)	Kaura Namoda, NGN/KG**	1,490.90	0.61 ▲	-0.36 ▾	56.38 ☒	114.83 ☒
Nigeria	Maize (white)	Lagos, NGN/KG**	1,523.80	4.83 ▲	16.19 ☒	34.43 ☒	105.75 ☒
Nigeria	Maize (white)	Maiduguri, NGN/KG**	2,101.70	5.38 ↑	4.36 ▲	-2.15 ▾	80.43 ☒
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 November 2024, * October 2024, ** September 2024, and ***August 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%)

⁴⁵ Fewsnets 2024

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

Rice

Figure 13: Price spreads for rice across select West African Countries⁴⁸

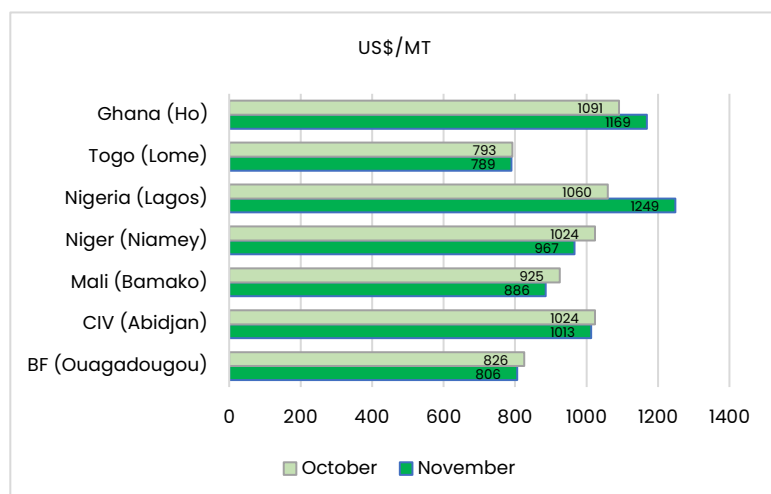


Figure 13 presents the price spread across seven West African countries for rice, with Lagos registering the highest price of rice at USD 1,249/MT followed by Ho at USD1,169/MT, while Ouagadougou has the lowest at USD 806/MT. However, changes in the local currency prices demonstrate generally stable or declining prices over the past one month (Table 13).

Compared to the past 6-12 months, however, the prices in local currencies remain higher as most of these countries battle with conflicts, below-average market supply due to droughts/floods, and macroeconomic economic challenges.

Table 13: Percentage changes in rice prices in West Africa⁴⁹

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	56,000.00	7.69	3.70	-1.75	21.74
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	0.00	7.14	7.14	7.14
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	50,000.00	0.00	2.04	19.05	25.00
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg*	629.00	1.45	6.97	7.16	7.71
Cote d'Ivoire	Rice (imported)	Abidjan, Retail, XOF/Kg*	531.00	-0.75	1.92	6.63	6.63
Mali	Rice	Bamako, Wholesale, XOF/100 KG	55,000.00	-1.79	5.77	25.00	22.22
Mali	Rice	Kayes, Wholesale, XOF/100 KG	56,000.00	-6.67	7.69	25.84	12.00
Mali	Rice	Mopti, Wholesale, XOF/100 KG	50,000.00	-4.76	0.00	16.28	11.11
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	55,000.00	0.00	14.58	14.58	22.22
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	48,000.00	-5.88	-4.00	6.67	11.63
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	41,000.00	-5.75	-7.87	-21.15	2.50
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	50,000.00	-4.76	-9.09	13.64	13.64
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	50,000.00	0.00	-9.09	8.70	13.64
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	700.00	9.38	-4.11	9.38	9.38
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	600.00	-6.25	-16.67	-6.25	-6.25
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	620.00	-3.13	-13.89	3.33	3.33
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	600.00	-3.23	-16.67	0.00	-6.25
Nigeria	Rice	Makarfi Market Centre, NGN/KG*	88,000.00	0.00	7.32	54.39	188.52
Nigeria	Rice (imported)	Ibadan, NGN/KG**	1,006.30	3.23	7.62	40.88	68.43
Nigeria	Rice (imported)	Kaura Namoda, NGN/KG**	642.87	-24.21	-21.89	9.05	71.72
Nigeria	Rice (imported)	Lagos, NGN/KG**	1,041.57	-11.71	-0.52	31.15	99.02
Nigeria	Rice (imported)	Maiduguri, NGN/KG**	1,315.80	15.04	31.58	90.23	139.93
Nigeria	Rice (milled)	Ibadan, NGN/KG**	1,523.83	3.56	-4.48	-9.10	70.55
Nigeria	Rice (milled)	Kaura Namoda, NGN/KG**	686.67	-27.26	-16.99	23.63	111.56
Nigeria	Rice (milled)	Maiduguri, NGN/KG**	1,173.05	7.02	35.35	75.95	141.68
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)	Kara, XOF/Kg*	490.00	0.00	0.00	4.26	0.00
Togo	Rice (imported)	Lomé, XOF/Kg*	490.00	0.00	2.08	2.08	0.00

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

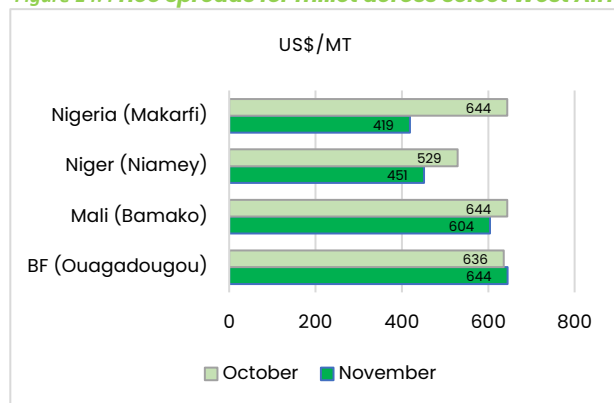
● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▽ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

⁴⁸ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

⁴⁹ Author's construction based on FAO data

Millet

Figure 14: Price spreads for millet across select West African Countries⁵⁰



The prices of millet in USD have declined in three out of the four select markets in West Africa (Figure 14). Except Ouagadougou, all other markets have experienced declines, with Makarfi (Nigeria) dropping the most from USD 644/MT to USD 419/MT, partly due to the depreciation of the Nigerian Naira. In terms of changes in local currency prices of millet across the three West African countries (Table 14), most markets show stable or declining prices, at least compared to the previous month. In Niger, except few markets (Agadez and Zinder), the current price is well below the levels seen in the past 1-6 months. Apart from this, the current prices remain above what was recorded 6-12 months ago overall in all monitored markets, with Nigeria having prices 48-153% above its one-year level.

Table 14: Percentage changes in millet prices in select West African Countries⁵¹

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	0.00	16.92	40.74
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	40,000.00	0.00	6.67	45.45	53.85
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	45,000.00	-5.26	-10.00	28.57	32.35
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	29,000.00	-3.33	-12.12	3.57	7.41
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	45,500.00	7.06	7.06	40.00	68.52
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	35,000.00	16.67	33.33	40.00	42.86
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	40,000.00	3.90	-4.76	23.08	45.45
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	44,250.00	1.72	-1.67	36.15	47.50
Mali	Millet	Bamako, Wholesale, XOF/100 KG	37,500.00	-3.85	4.17	50.00	63.04
Mali	Millet	Gao, Wholesale, XOF/100 KG	43,000.00	-9.47	-9.47	22.86	22.86
Mali	Millet	Kayes, Wholesale, XOF/100 KG	41,000.00	2.50	30.16	46.43	46.43
Mali	Millet	Mopti, Wholesale, XOF/100 KG	36,500.00	-6.41	-8.75	30.36	62.22
Mali	Millet	Ségou, Wholesale, XOF/100 KG	30,000.00	-14.29	0.00	42.86	57.89
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	40,000.00	0.00	5.26	60.00	77.78
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	40,750.00	-1.81	-7.39	8.67	35.83
Niger	Millet	Agadez, Wholesale, XOF/Kg	340.00	-34.62	-34.62	13.33	6.25
Niger	Millet	Dosso, Wholesale, XOF/Kg	250.00	-37.50	-41.86	-26.47	0.00
Niger	Millet	Maradi, Wholesale, XOF/Kg	250.00	-1.96	-31.51	-21.88	0.00
Niger	Millet	Niamey, Wholesale, XOF/Kg	280.00	-12.50	-36.36	-17.65	3.70
Niger	Millet	Tillabéri, Wholesale, XOF/Kg	300.00	-11.76	-36.84	-21.05	0.00
Niger	Millet	Zinder, Wholesale, XOF/Kg**	420.00	-4.55	35.48	40.00	31.25
Nigeria	Millet	Giwa, NGN/KG**	874.40	-0.57	12.84	69.69	48.29
Nigeria	Millet	Ibadan, NGN/KG**	723.27	-25.81	-18.89	3.24	73.13
Nigeria	Millet	Kano, NGN/KG**	891.53	9.33	9.26	64.61	152.99
Nigeria	Millet	Kaura Namoda, NGN/KG**	865.33	6.05	11.97	79.38	88.86
Nigeria	Millet	Lagos, NGN/KG**	825.60	3.76	-0.68	41.95	60.73
Nigeria	Millet	Maiduguri, NGN/KG**	1,261.37	11.70	22.67	67.57	59.71
Nigeria	Millet	Makarfi Market Centre, NGN/KG*	52,000.00	-7.14	15.56	9.47	92.59

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

⁵⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁵¹ Author's construction based on FAO data

Sorghum

Figure 15: Price spreads for sorghum across select West African Countries⁵²

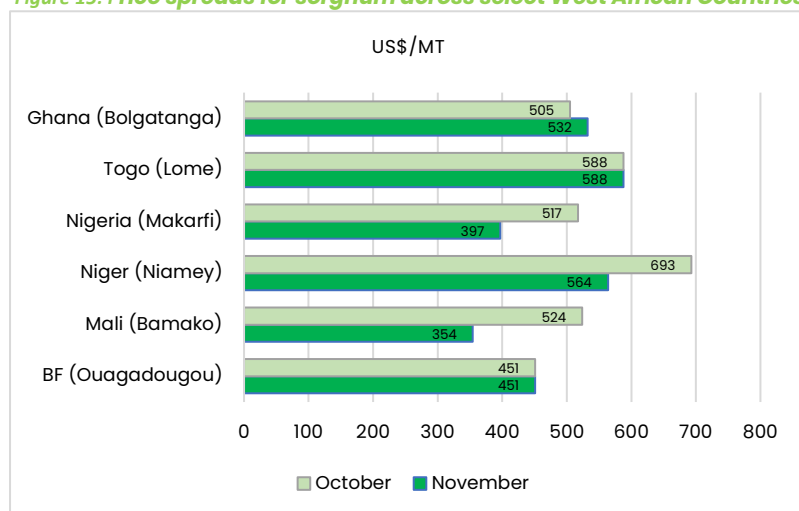


Figure 15 illustrates the price spread among major markets in the select West African countries for Sorghum. Over the previous month, we have seen some significant drop in the prices of sorghum in Nigeria (from USD 517 to USD 397), Niger (from USD 693/MT to USD 564/MT), and Mali (from USD 524/MT to USD 354/MT), while Ghana has experienced a minor surge in price. The main driver of this change is notably the depreciation of the West African CFA Franc. Table 15 further highlights the changes in local currency prices. Compared to October, the prices of sorghum generally show decline or stability in Burkina Faso, Mali, Niger and Togo. Except Togo, all select countries' prices are above what they were a year ago. Nigeria continues to experience the highest surges in prices over the period, with the Makarfi and Kano markets being the most affected at 118.6% and 119.5% compared to the previous year's level.

Table 15: Percentage changes in sorghum prices in select West African countries⁵³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	23,500.00	-6.00 ↓	-6.00 ↓	4.44 ▲	6.82 ↑
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	30,000.00	0.00 ●	0.00 ●	20.00 ☒	50.00 ☒
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	34,500.00	-8.00 ↓	-13.75 ↓	6.15 ↑	18.97 ☒
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	27,000.00	-8.47 ↓	-12.90 ↓	3.85 ▲	10.20 ↑
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	30,000.00	0.00 ●	0.00 ●	20.00 ☒	33.33 ☒
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	28,000.00	0.00 ●	-11.11 ↓	24.44 ☒	27.27 ☒
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	22,000.00	-32.31 ↓	-24.14 ↓	-8.33 ↓	-4.35 ▾
Mali	Sorghum	Gao, Wholesale, XOF/100 KG					
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	34,000.00	-2.86 ▾	19.30 ☒	36.00 ☒	30.77 ☒
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	32,000.00	1.59 ▲	0.00 ●	23.08 ☒	39.13 ☒
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	30,000.00	0.00 ●	20.00 ☒	42.86 ☒	46.34 ☒
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	37,500.00	7.14 ↑	-11.76 ↓	7.14 ↑	25.00 ☒
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	360.00	-33.33 ↓	-21.74 ↓	20.00 ☒	12.50 ↑
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	275.00	-26.67 ↓	-36.05 ↓	-19.12 ↓	-5.17 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	290.00	-9.38 ↓	-17.14 ↓	-9.38 ↓	20.83 ☒
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	350.00	-18.60 ↓	-18.60 ↓	16.67 ☒	22.81 ☒
Niger	Sorghum	Tillabéri, Wholesale, XOF/Kg	310.00	-26.19 ↓	-29.55 ↓	-13.89 ↓	-3.13 ▾
Niger	Sorghum	Zinder, Wholesale, XOF/Kg**	420.00	-4.55 ▾	27.27 ☒	40.00 ☒	31.25 ☒
Nigeria	Sorghum	Makarfi Market Centre, NGN/KG*	1,153.80	6.19 ↑	56.55 ☒	94.70 ☒	118.61 ☒
Nigeria	Sorghum (white)	Giwa, NGN/KG**	1,463.80	4.33 ▲	4.45 ▲	17.56 ☒	95.50 ☒
Nigeria	Sorghum (white)	Ibadan, NGN/KG**	1,554.13	2.73 ▲	22.98 ☒	24.50 ☒	61.64 ☒
Nigeria	Sorghum (white)	Kano, NGN/KG**	1,750.00	-2.49 ▾	10.76 ↑	25.00 ☒	119.57 ☒
Nigeria	Sorghum (white)	Kaura Namoda, NGN/KG**	1,823.47	8.91 ↑	10.97 ↑		116.38 ☒
Nigeria	Sorghum (white)	Lagos, NGN/KG**	1,298.57	12.71 ↑	23.03 ☒	68.96 ☒	78.86 ☒
Nigeria	Sorghum (white)	Maiduguri, NGN/KG**	2,500.00	3.85 ▲	16.66 ☒	16.66 ☒	113.24 ☒
Togo	Sorghum	Anié, 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 November 2024, * October 2024, ** September 2024, and ***August 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 These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁵³ Author's construction based on FAO data

Fertiliser

Overall, the prices of monitored fertiliser types across the selected West African countries show downward trends due to low off-season demands (Table 16). In Côte d'Ivoire, the current prices of all fertiliser types are below what they were in the past 1-12 months, being between 13% and 22% below the level seen a year ago. In Ghana, the prices of all types of fertiliser are stable over the past one month but mostly above the past 3-12 months. In Nigeria, except NPK 15-15-15, NPK 20-10-10 and urea prices remain above their levels seen in the past 1-12 months.

Table 16: Percentage changes in fertiliser prices in West Africa⁵⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Cote d'Ivoire	Urea	National Av, USD/50KG***	29.56	-2.22 ↘	-2.86 ↘	-15.90 ↓	-21.63 ↓
Cote d'Ivoire	NPK 15-15-15	National Av, USD/50KG***	32.34	-2.27 ↘	-2.88 ↘	-11.45 ↓	-15.25 ↓
Cote d'Ivoire	PK 0-23-19 + 6.5S + 5MgO + 10CaO	National Av, USD/50KG***	30.74	-2.26 ↘	-2.88 ↘	-5.12 ↓	-13.53 ↓
Ghana	Ammonium Sulphate	National Av, GHS/50KG	288.00	0.00 ●	0.00 ●	-1.37 ↘	4.35 ▲
Ghana	NPK 15-15-15	National Av, GHS/50KG	437.50	0.00 ●	0.00 ●	-0.41 ↘	4.17 ▲
Ghana	NPK 20-10-10	National Av, GHS/50KG	431.70	0.00 ●	2.18 ▲	0.75 ▲	8.20 ↑
Ghana	NPK 23-10-5	National Av, GHS/50KG	521.50	0.00 ●	15.48 ×	16.82 ×	18.98 ×
Ghana	NPK 25-10-10	National Av, GHS/50KG	420.00	0.00 ●	5.00 ▲	5.00	10.53 ↑
Ghana	Urea	National Av, GHS/50KG	422.70	0.00 ●	0.28 ▲	-2.40 ↘	3.88 ▲
Nigeria	NPK 15-15-15	National, USD/50KG***	22.42	-5.88 ↓	-19.09 ↓	-12.15 ↓	
Nigeria	NPK 20-10-10	National, USD/50KG***	170,000.00	1.49 ▲	3.03 ▲	86.81 ×	
Nigeria	Urea	National, USD/50KG***	103,000.00	7.85 ↑	27.16 ×	77.59 ×	182.19 ×

Note: Last price is for November 2024, * October 2024, ** September 2024, and ***August 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**, new harvests, particularly of cereals, are ongoing although internal flows to markets remain limited due to insecurity. In **Niger**, new harvests estimated to be good improve household access to food and income in agricultural and agropastoral areas.⁵⁵ In **Nigeria**, the main season harvest is currently in progress across Nigeria, with off-season land preparation activities beginning in the northern regions. However, conflicts, early dry spells and late-season flooding have adversely affected main-season production. For instance, in northeast Nigeria, below-average agricultural production in 2024 and further increases in food prices has been recorded due to ongoing insecurity.⁵⁶ In flood affected areas, maize losses alone are estimated at 486,000 tons. In **Mali**, overall average harvests are expected which will lead to sufficient food availability to households in the country during the 2024/25 food year.⁵⁷ Nevertheless, the reduction in production caused by flooding and the abandonment of fields due to insecurity will result in an early depletion of stocks in the affected regions. This will lead to an atypical decrease in cereal availability in the markets following the post-harvest period.

⁵⁴ Author's construction based on AfricaFertiliser.org

⁵⁵ <https://fews.net/west-africa/niger>

⁵⁶ <https://fews.net/west-africa/nigeria>

⁵⁷ <https://fews.net/west-africa/mali>

Food Trade Updates

East Africa

The U.S. plans to contribute another \$560 million in “new funding” to the Lobito Corridor Rail Project, which will bring total U.S. private and public investment in the corridor to more than \$4 billion. The initiative is expected to have a transformative impact on enhancing access to critical minerals needed for the clean energy transition and digital connectivity, strengthening food security, boosting regional trade, and empowering communities all along the Corridor.⁵⁸

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 November 2024



Tanzania

- The Tanzanian government secured funding, from Standard Chartered, China Export and Credit Insurance Corporation (Sinosure) and the Africa Development Bank (AfDB), for the construction of a section of the standard gauge railway (SGR) linking Tanzania and Burundi.
- Tanzania's National Food Reserve Authority (NFRA) has informed Zambia to cease maize supply due to Zambia's failure to meet the contractual obligations agreed upon by both nations.

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 November 2024



Zimbabwe

The Government of Zimbabwe issued a total of 885 import permits to 423 private companies, contrary to the normal practice of private companies buying grain from the Grain Marketing Board (GMB). This is part of the measures taken to ensure food security until the next harvest.

Malawi

Malawi acceded to the establishment Agreement for Afreximbank's Fund for Export Development in Africa (FEDA). FEDA is the development impact investment arm of African Export-Import Bank (Afreximbank), aimed at delivering long-term capital to African economies with a focus on industrialisation, intra-African trade and value-added exports.

Mozambique

Mozambique post-election tensions disrupt regional trade. Exports and imports through the Port of Maputo and a border post with South Africa have been disrupted amid post-election unrest in Mozambique.

⁵⁸ [FACT SHEET: Partnership for Global Infrastructure and Investment in the Lobito Trans-Africa Corridor | The White House](#)

West Africa

The Economic Community of West African States (ECOWAS) Commission launched the e-certificate of origin to facilitate cross border trade among communities and reduce associated fraud. The e-certificate of origin is piloted by four member states including Nigeria, Ghana, Côte d'Ivoire and Senegal and will enable seamless creation of regional value chain to enhance trade, help custom officials keep accurate track of goods and reduce associated fraud, duplication and forgery through automation.⁵⁹

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 November 2024



⁵⁹ [ECOWAS e-certificate of origin to tackle fraud, facilitate cross border trade – Businessday NG](#)



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

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