Highlights

- Season 2015 B production remained similar to season B production of last year (Figure 2). Household level stock depletion continues, and lean season is expected to last through December.

- Staple prices stabilized in September compared to last month and last year, except for roots and tubers, which exhibited a rising trend. Moreover, about 40 percent of markets experienced higher-than-average prices.

- The first 20 days of October were marked by relatively normal rainfall (Figure 3), despite the forecast of a wetter-than-normal October-December period linked to El Niño. Rainfall is expected to peak in the last quarter of 2015 and last until early 2016.¹

**Season 2015 B production remained unchanged from the previous season:** Agriculture production of key staple commodities (cereals, legumes and pulses, roots and tubers) in season 2015 B has been similar to Season B of last year (Figure 2). As expected this time of the year, the crop calendar involves weeding (Figure 1), and most households experience continuous reduction in food stocks from their own production. This is also linked to increasing market reliance regarding food sources with more exposure to high prices. This trend is expected to be reversed in December when fresh harvests from season 2016 A will be available.
Figure 2: Seasonal production and yield

Source: National Institute of Statistics of Rwanda (NISR)

Calculations based on Seasonal Agricultural Survey Reports


Roots and tubers were generally more expensive: Referring to calculations based on e-soko/MINAGRI data, September staple prices in general exhibited a stable trend compared to last month and last year with the exception of roots and tubers. About 40 percent of markets experienced higher prices than their respective five-year averages. Prices are expected to continue rising steadily in the coming months, as households seasonally rely more on markets till harvest time towards the end of December.

The first 20 days of October were marked by normal rainfall: Seasonal rainfall ranged between normal and below normal in September, which resulted in localized delayed planting. The first 20 days of October were also characterized by relatively average rainfall. Nonetheless, according to the Ministry of Disaster Management and Refugee Affairs (MIDIMAR), there is increased likelihood of above-normal rainfall in the coming months linked to El Niño. Most parts of the country are expected to experience above-normal rainfall, and adverse effects on agricultural production might compromise normal food availability, which in turn may lead to reduced food security among less resilient households.

Figure 3: Rainfall anomalies. This depicts the deviation of current rainfall from the long-term mean. In other words, current rainfall minus the long-term average might result in positive (above average) or negative (below average) figures.