Highlights

- December 2015 was marginally drier than normal, except in a small segment of central Rwanda, which experienced 25-50 mm of above-average rainfall (Figure 2).

- Most staple prices in December were higher than last year and the long-term average, but were more stable than November prices in most markets.

- Seasonal harvesting started and variable timing is occurring as a result of anomalous seasonal rainfall onset.
Rainfall in December ranged between slightly below and above normal: The eastern and part of the south-western regions faced nearly 25 mm of below-average rainfall, while a small central section had 10-25 mm more than normal. The pattern for the remaining parts was relatively typical. The first 10 days of January were normal as well. The October-November-December period was wetter than average with 25-75 mm more rainfall than usual, except for a minor portion of the north-eastern region, which had less-than-average moisture. Increased moisture experienced during the previous three months were in line with forecast reports, indicating above-normal rainfall, which emphasized increased moisture from last quarter of the year until early 2016 as a result of El Niño.¹

Staples were generally more expensive than normal in December: Referring to calculations based on e-soko/MINAGRI data, staple prices exhibited a rising tendency in most markets. They were generally higher than last year and the long-term average. This continued to restrain access of the most vulnerable as their purchasing power remained limited. Prices are expected to start moderately declining as a result of expected near-normal seasonal harvests.

Bean prices, in particular, remained higher in December than the long-term average even in warmer eastern regions where the growth period is shorter. As beans are the most common protein source across livelihood zones and wealth groups, the commodity has very limited substitutes. Consequently, in absence of cheaper imports, bean prices will most likely remain higher than normal and restrain access of the most vulnerable.

Seasonal harvests are expected to moderately replenish household stocks: January marks harvesting time for most farmers and household stocks are expected to be seasonally replenished. Following poorly distributed rainfall throughout the season, production is expected to be slightly below average. Though households are currently less reliant on markets, stock depletion is expected to happen a little earlier than usual in areas that experienced poor seasonal agriculture performance.
Figure 2: 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.

Source: USGS/Early Warning Explorer