According to the Rwanda Governance Board, in the 2016 citizen report card, about 37% of interviewed household members reported delays in inputs’ availability; which negatively impacted on the seasonal performance.

December retail prices for key staples increased on average by 45 and 28 percent compared to five-year and last year averages.

Rainfall in October-December period was below normal; which, coupled with delays in access to inputs, resulted into season 2017A output reduced by about 30-40%. East and South are of particular concern due to extended dry-spell events since previous season.

As of December, 33% of interviewed retailers in markets serving Kiziba, Mugombwa, Gihembe, Nyabihike and Kigeme refugee camps expected lower market supply and higher prices, as would normally happen in the coming three months.

Hence, poor food security conditions will prevail in general, especially in the South and Eastern provinces which experienced around two consecutive poor seasons, among other reasons.

**Figure 1:** Evolution of food and non-alcoholic beverages consumer price index

October-December period was marked by below normal rainfall in most parts:

Crop growth experienced reduced rainfall, especially in December in addition to late planting due to delays in access to inputs (Figure 4). The recent citizen report card findings are in line with other information sources, indicating around 37% farmer household members dissatisfied with inputs’ delivery services in 2016. The same report points out to 50-60% discontentment for Karongi, Kicukiro, Gasabo, Nyagatare and Nyaruguru districts about agriculture services in general. This adversely impacted on seasonal output, and losses will be about 30-40%.

**Key staples were generally more expensive than usual:** According to data from the National Institute of Statistics of Rwanda (NISR), main staple prices in December 2016 were higher than five-year-average, with an increase of about 45 percent. The top three most expensive commodities, compared to normal, were the important starchy types like Sweet potatoes, Cassava flour and Cooking banana. Additionally, Beans as the most predominant source of proteins were also more expensive than usual (Figure 2).

Moreover, the food and non-alcoholic consumer price index gradually increased since the beginning of 2016 till October and relatively stabilized in November-December with a slight decreasing trend (Figure 1); which shows disproportionate trend to the harvest period.

With current below average harvests, staple prices will most likely stabilize for a shorter period and resume the upward tendency till the next harvests, assuming an average season 2017B performance. In absence of assistance to the vulnerable and/or cheaper imports, this will continue to exert significant pressure on households’ resources and ability to meet basic needs.

**Figure 2:** Evolution of consumer price index

Source: Based on NISR CPI data, accessible online
Around 30% of interviewed traders in and around 5 camps except Mahama, expect lower market supply in staples and higher prices in January-March (Figure 3), though this period usually marks post-harvest and seasonally higher availability of food from agricultural season A. While traders around Kiziba camp were about 100% expecting lower supply and higher prices, it is worth noting that the area faces structural issues including poverty, food insecurity and malnutrition, among others.

The figure 4 depicts the deviation of current rainfall from the average. In other words, current rainfall compared to the Long Term Averages (LTA) back, might result in positive (above average) or negative (below average) percentages.