AN OVERVIEW

In February, key staples were generally more expensive than usual: According to data from the National Institute of Statistics of Rwanda (NISR), main staple prices in February 2017 were higher than five-year-average, with an increase of about 44 percent. The top three most expensive commodities, compared to normal, were the important starchy types like Sweet potatoes, Cassava flour and Cooking banana. Though Bean prices seasonably remained stable following harvests in December-January, they were still higher than usual (Figure 3). The food and non-alcoholic consumer price index also increased compared to January, and is still higher than same time last year (Figure 1).

Moreover, lower than average agricultural output across East African region, especially Somalia, Ethiopia and Kenya is expected to result into increased demand for staples; which is less likely to benefit Rwanda’s access to cheaper imports. Therefore, with current below average harvests, staple prices will most likely continue rising till the next harvests. This will continue to exert significant pressure on households’ resources and ability to meet basic needs, mostly because income levels remain relatively stable. Government has been providing assistance to the vulnerable to some extent, but poor food security conditions persist in general, atypically for the less resilient in the South and Eastern provinces, where around two consecutive poor seasons occurred.

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

- According to IGAD Climate Prediction and Application Center (ICPAC), there is increased probability of above to near normal rainfall over March-April-May period in Rwanda. February to March period was marked by near normal rainfall with a slightly decreasing trend.

- Army worms’ outbreak so far affected 15,699 hectares in 108 sectors across 23 districts, damaging maize and sorghum crops.

- Rwanda’s key staples formal trade with neighboring countries experienced a wider negative balance in 2016 compared to last five years.
Near normal rainfall with a decreasing trend was experienced in February-March: February-March rainfall was near normal but trending downwards, up to 20% below average in most locations (Figure 2). The forecast for the March-April-May period indicates increased likelihood of normal to above normal rainfall, according to the ICPAC’s 45th Greater Horn of Africa Climate Outlook Forum (Figure 5). However, continued rainfall monitoring will best inform seasonal moisture conditions’ performance.

Apart from rainfall performance, about 15,699 ha of maize and sorghum crops are already affected by army worms so far reported in 108 sectors across 23 districts. MINAGRI in collaboration with MINALOC and districts are carrying out awareness campaigns countrywide to prevent and fight the outbreak; encouraging the population to burn out army worms and apply proper pesticides.

Rwanda experienced a wider negative trade balance for key staples in 2016 compared to last five years: Based on satellite data, agricultural output in 2016 has been subject to poor rainfall performance, in both quantity and distribution across seasons and locations. This led to significant imports for local markets’ supply. For instance, imported cereal flour of different types more than tripled compared to 2015, while the exported volume decreased by 5%.

Regarding Maize grain, imports rose by 31%, while exports declined by about 20%. In other words, maize trade balance was -83,659 MT in 2015 while it reached -111,894 MT in 2016 (Figure 4).

**Figure 2: Rainfall anomalies**

![Figure 2: Rainfall anomalies](image)

These depict the deviation of current rainfall from the average (Figure 2). In other words, current rainfall compared to the Long Term Average (LTA) back, might result in positive (above average) or negative (below average) percentages.

**Source:** FAO

**Figure 5: Rainfall anomalies.**

The depict the deviation of current rainfall from the average (Figure 2). In other words, current rainfall compared to the Long Term Average (LTA) back, might result in positive (above average) or negative (below average) percentages.

**Source:** FAO
**Figure 3:** February 2017 prices and anomalies

Source: Calculations based on NISR price data.

**Figure 4:** Imports-Exports for key staples ("Based on NISR data")
**Figure 5: IGAD Climate Prediction and Applications Center (ICPAC)**

**Zone I:** Usually dry during March to May.

**Zone II:** Increased likelihood of near normal to above normal rainfall.

**Zone III:** Increased likelihood of below normal to near normal rainfall.

**Zone IV:** Increased likelihood of above normal to near normal rainfall.

Source: IGAD Climate Prediction and Applications Center (ICPAC)

**Figure 6: Seasonal calendar_2017**

Source: FEWSNET