AN OVERVIEW

Food prices were higher than average: According to data from the National Institute of Statistics of Rwanda (NISR), main staple prices in May were higher than five-year-average, with an increase of about 44 percent.

The top three most expensive commodities with over 55% of increase compared to normal, were the important starchy types like Maize grain, Cassava flour and Sweet potatoes. Beans as the main source of proteins also faced an increase of 17% and 21%, respectively from previous year and last 5 years, while slightly decreased compared to previous month by 5 percent due to season 2017 B first harvests (Figure 2). Food and non-alcoholic beverages consumer price index in May was 14 and 23 percent higher than same time last year; respectively in urban and rural areas, but slightly decreased, at a slower pace compared to usual, from last month by 2 percent on average, as first harvests were already available. For instance, the signal of inflation reflected in consumer prices increases the cost to about 38 percent; which would be lower in case of enough market supply (Figure 2).

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

Source: Based on NISR CPI data

HIGHLIGHTS

Key staple prices were higher than their respective five-year averages by around 44 percent; which translates into weakened purchasing power of the most vulnerable.

March to May period was marked by near normal rainfall with a decreasing trend, mostly in the southwestern parts of the country, where shortfalls from seasonal agricultural output are most adversely limiting food access.

Though May marks availability of first harvests in most parts of the country, preliminary findings of the 14th round of Food Security and Nutrition Monitoring System (FSNMS) indicated lowest record of food secure households.
Localized below average season 2017 B production occasioned by poor rainfall performance points out to increased likelihood of higher than normal food prices in the coming months, due to tightened local market supply from producers. This will be compounded by increased demand from the region, where poor seasonal performance persists, according to FAO quarterly global report on crop prospects and food situation; reducing chances of availability of cheaper imports.

This continues to exert significant pressure on households’ resources and ability to meet basic needs, mostly because income levels do not proportionally increase with prices.

Near normal rainfall with a decreasing trend was experienced in March-May: Season B rainfall was near normal but trending downwards, up to 40% below average in southwestern locations (Figure 3), resulting into lower than usual agricultural output.

Apart from rainfall performance, unpublished report from Rwanda Agriculture Board (RAB) indicates that around 17,521 hectares of maize across all 30 districts had been infected by end of April, out of 46,403 hectares planted with maize in season 2017 B. There is a probability of further infection in the coming season, from the pest inoculants which might have remained in farms. It is important to note that, maize which is the preferred fall armyworm host, occupies largest area in season A; which points out to a larger scale risk regarding maize production.

A regional perspective in terms of fighting the pest also needs particular attention, because the insect increases mobility once it changes to a moth.

**Figure 2: Prices and anomalies**

Source: Based on NISR price data
62 percent of households were food secure, lowest record since 2010: Following a series of poor rainfall performance events in recent years, households’ ability to cover basic food and non-food needs shifted downwards. Creation of income generating activities, access to inputs and support to households which faced shocks were the main suggestions from households towards better access to food.

**Figure 3: Rainfall anomalies**

Rainfall anomalies: The anomalies depict the deviation of current rainfall from the average (Figure 3). In other words, current rainfall compared to the Long Term Average (LTA) back, might result in positive (above average) or negative (below average) percentages.

**Figure 4: Seasonal calendar**