OVERVIEW

Food prices in December were slightly lower than previous month and same time last year, but higher than long term average, with implication on limited purchasing power of the poor: Figure 1 indicates that the food and non-alcoholic consumer price index was about 4.7 percent lower compared to previous month, 6.2 percent lower than one year earlier and 28 percent higher than three years ago, according to National Institute of Statistics of Rwanda (NISR).

Moreover, key staples had variable trends, whereby, beans, irish potatoes and maize prices ranged from normal to below their respective 5-year averages, while cooking banana and cassava flour remained higher (Figure 2). On food supply side, cheaper imports and availability of harvests contributed most to alleviated high price challenge.

Localized areas, mostly in eastern parts of Rwanda experienced poor rainfall performance: According to RAB, farmers in 17 sectors, including Karangazi, Nyagatare, Rukomo and Katabagmu of Nyagatare district; Rwinkwavu, Ndego, Kabare, Murundi, Mwill and Rukara of Kayonza district, as well as Mpanga, Kigarama and Nyamugali sectors in Kirehe District, and Rweru, Rilima, Gashora and Shara in Bugesera had less favorable rainfall throughout the season. RAB also indicates that yields from areas which received optimal rainfall will fill the gap.

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

Source: Based on NISR CPI data (Base: 2014; Reference: February 2014=100)
Generally, there has been a series of events with potential impact on overall seasonal performance. For instance, rainfall in the first 20 days of December has been up to 60 percent below average, and it was erratic during the preceding time (Figure 3). Fall army worms were identified across districts, but high level community sensitization was achieved. Nonetheless, cost and labor implications will be important to consider, at the end of the season when official figures will be available, to better understand overall performance.

According to the Ministry of Agriculture and Animal Resources (MINAGRI), the government of Rwanda assisted over 15,000 residents from around 4,000 households in the districts of Kirehe and Kayonza affected by drought during season 2018A, since the month of December.

**Figure 2:** December 2017 prices (RWF/kg) and anomalies

Source: Calculations based on NISR price data
Figure 3: Rainfall anomalies

Anomalies depict the deviation of current rainfall from the average. 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: www.fao.org

Figure 4: Seasonal calendar

Source: www.fews.net