

19 JUNE 2020 – BULLETIN NO. 11

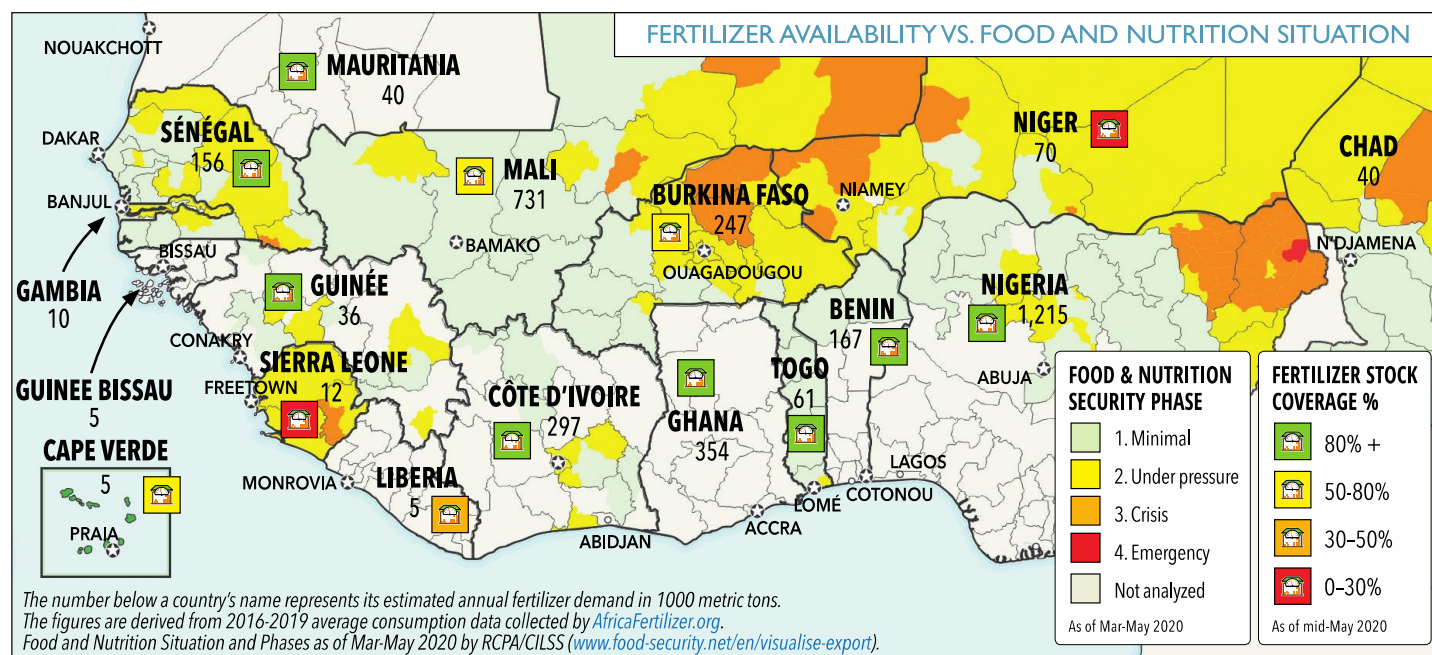
WEST AFRICA FERTILIZER WATCH

PROVIDING WEEKLY INFORMATION ON THE IMPACT OF COVID-19 ON THE WEST AFRICA FERTILIZER MARKET

ANALYSIS

Edition No. 11 – 19 June 2020

Recommended sources of information
on Covid-19, logistics, food production and
prices, and fertilizer markets in West Africa



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Making 2020 campaign a success, preparing for 2021

Status of COVID-19 pandemic

The COVID-19 pandemic appears to be gaining momentum in West Africa, with +23% new cases recorded during the week, confirming the previous week's trends. The region had 53,912 cases on 16 June compared to 46,230 on 9 June.

Sanitary restrictions are maintained or reinforced, but States are making efforts not to hinder the free movement of goods within countries and the sub-region, as further recommended by the ECOWAS Ministerial Committee for the Coordination of Transport, Logistics and Trade.

Coordinated responses of States and regional institutions

ECOWAS held a virtual ministerial conference on 18 June to present the World Bank's new USD 500m support programme for the resilience of food systems in West Africa (FSRP), the successor to the WAAPP.

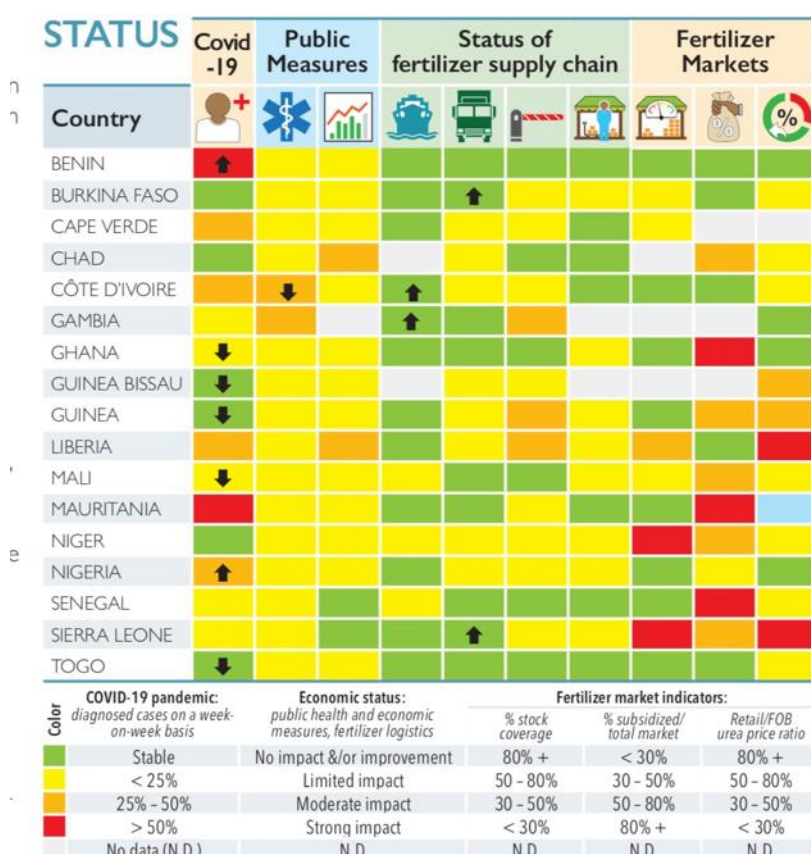
For its part, the AfDB announced on June 8 the FAREC (Feed Africa Response to Covid-19) to ensure food security in the face of the effects of COVID-19 and to support the agricultural sector. This component of the USD 10 billion Rapid Response Facility will support the provision of agricultural inputs through smart subsidies.

Preparing for an Africa Fertilizer Watch

After the publication of the first 10 editions of the West Africa Fertilizer Observatory, it is obvious that we will have to live with the fact that COVID-19 will have a significant and long-lasting impact on this and the next agricultural season. We need to start preparing for the 2021 season, and ensure that adequate stocks of high

quality, crop specific fertilizers are then available throughout West Africa, and throughout Africa.

From July 2020, the Fertilizer Observatories in West Africa and Eastern and Southern Africa will be expanded into an African Fertilizer Watch covering 28 countries in Sub-Saharan Africa. This new joint initiative will be led by AfricaFertilizer.org, in collaboration with the African Union, and with the support of several technical and financial partners, including the Bill and Melinda Gates Foundation, Development Gateway, the International Fertilizer Association (IFA), the African Agribusiness Partnership (AFAP) and the United States Agency for International Development (USAID).



Higher risks to the food and nutrition situation in countries that have not yet secured enough fertilizer for the season

Fertilizer distribution continues to go relatively well, with some delays or more serious problems as in Mali (rice programme, fertilizer subsidy or cotton price increase). Senegal, Ghana and Nigeria are getting ready to import the missing volumes to meet the demand for fertilizers for this crop year.

Agricultural commodity prices have remained stable and food supply is being met, with pockets of food insecurity that the RPCA (see the map below) anticipates to expand significantly over the summer, especially in already fragile areas (Sahel, Mano River countries).

Excluding subsidy programmes and commercial markets, the purchasing power and demand for fertilizers of small-scale farmers is expected to be sharply reduced, negatively impacting agricultural production and the economic resilience of the most fragile farms.

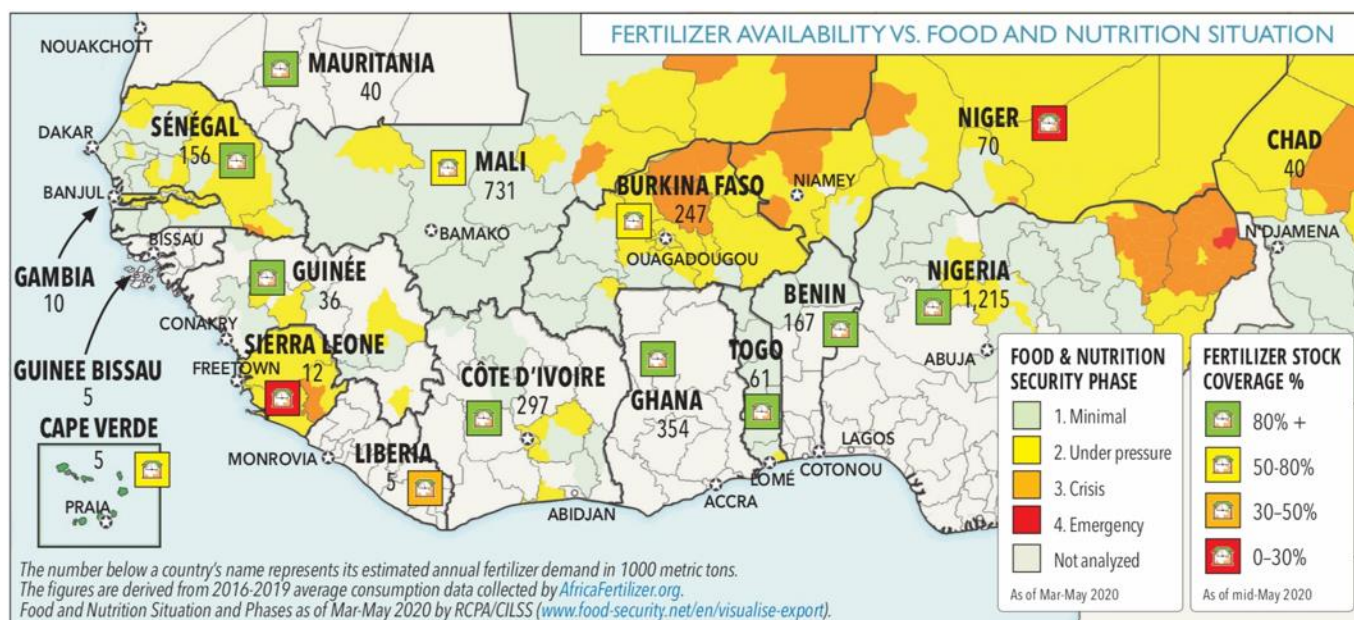
In the following pages, find our selection of information sources to better understand and analyze the situation in West Africa.

In this penultimate issue, we would like to share with our readers some of the key resources and sources of information we have used to publish these newsletters.

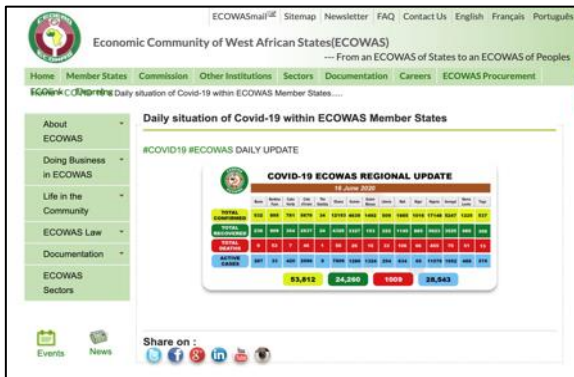
We hope you will find them useful and informative for your businesses and institutions.

- COVID-19 Pandemic Status
- Situation of the logistics chain, from ports to farms
- State of food and nutrition security
- Production, stocks and prices of agricultural products
- Fertilizer markets, prices and market analysis

We will publish next week in our last weekly booklet a complete and updated review of the information we have been able to gather for the 17 countries of the region on the indicators we have been monitoring since April 10, 2020.



Monitoring COVID-19 pandemic



[The ECOWAS Daily situation of Covid-19](#)

From the onset of the pandemic to date, the ECOWAS commission has been publishing the statistics about the disease in its 15 member states. Thus giving a global picture of how the regions as a whole is faring.

In our watch, this is the main source that was used to calculate the percentage of growth in the number of cases from one week to another.



[John Hopkins University COVID-19 Dashboard](#)

The Watch was covering 17 countries i.e. The ECOWAS countries plus Chad and Mauritania. As Mauritania and Chad statistics were not covered by the ECOWAS Daily update mentioned above, the John Hopkins University Covid Dashboard came in handy to fill the information gap for these two countries.

Monitoring Fertilizer Logistics

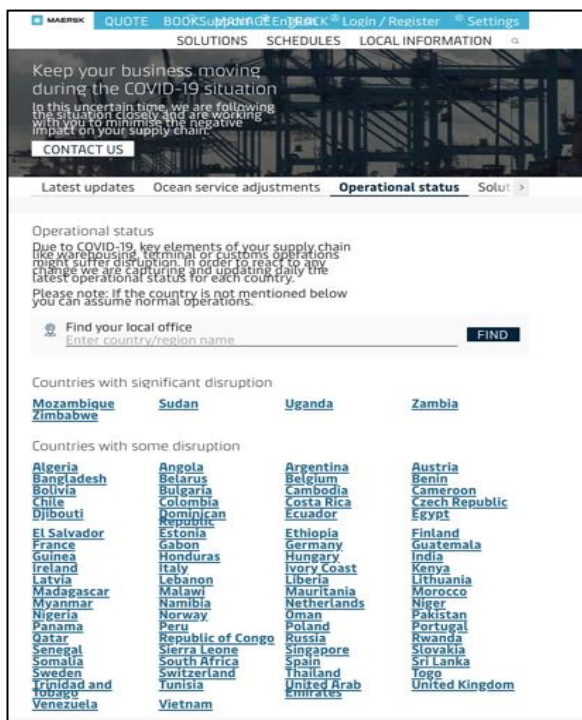
In addition to direct interaction with importers and port authorities, we have used 3 free resources from logistic companies.



[BOLLORE COVID-10 Impact update](#)

This website from BOLLORE Logistics provides great insight on the port and road transport situation in most of the countries of the region except Bissau Guinea.

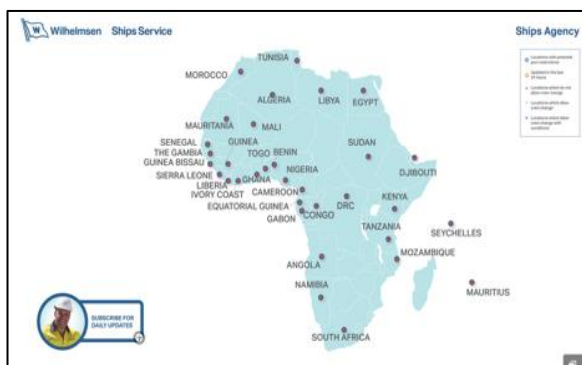
The website is updated regularly to reflect changes that happen in the country and that may impact logistics.



Maersk Operational status

Like Bolloré, Maersk, provides information about port activities.

In addition, providing the Watch with information on port, the Maersk site highlights countries where there is significant disruption in the port logistics. This was important to assess whether fertilizer imports in those countries might suffer.

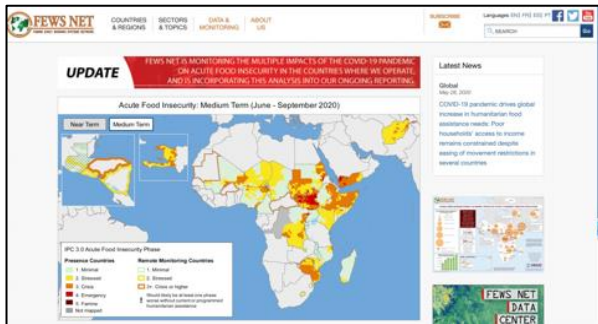


Wilhelmsen

Wilhelmsen publishes a map with detailed information on the logistic situation in each country. The free information presented for each country are centered around restrictions on the port, restriction to crew members and other restrictions that may impact sea freight.

Monitoring Food Security in West Africa

In analyzing responses to the COVID19 pandemic by governments in the region. One thing that we looked at is what was being done for the Agricultural sector. Moreover, we looked at the potential of these interventions in averting the announced risk of food crisis. Some of the resources that enabled us to do these analysis, are listed below.

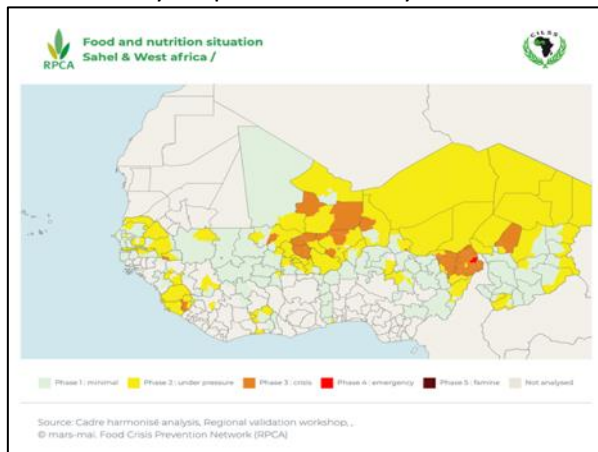


FEWSNET

The Famine Early Warning Systems Network also known as FEWS Net. provides information about countries where there is a risk of a food crisis. With the covid 19 pandemic experts are anticipating that more countries might find themselves in this situation.

The information can inform governments on where to direct subsidies and other forms of intervention for optimum result in attaining food security.

Food Security Map for March-May 2020

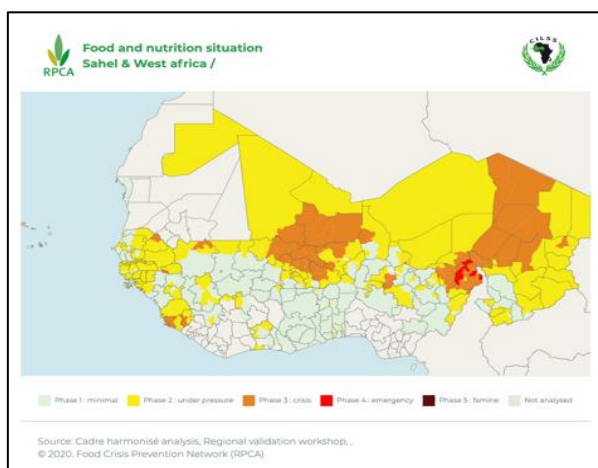


The Food Crisis Prevention Network in West Africa

May 2020 update: Ongoing insecurity, the increase in IDPs, and COVID-19 is increasing the need for humanitarian assistance.

- 11.4 million people are in need of food and nutrition assistance (March-May 2020).
- 17 million people will be affected during the lean season (June-August 2020)
- 1.2 million people will face an emergency situation.

Food Security Map for June-August 2020



Areas of Highest Concern: NIGERIA

Boko Haram attacks continue in the northeast, and insecurity in the northwest and central states are causing displacement of households and limiting access to livelihoods. Over 2.5 million people are currently internally displaced in these regions.

Areas of Concern: BORDERING AREAS OF BURKINA FASO, NIGER, AND MALI

The deteriorating security situation is disrupting household access to livelihoods and markets. At least 3,000,000 people are displaced throughout the region.



COVID-19 Situation Report #3

SITUATION AS OF JUNE 11, 2020

- Cases of COVID-19 continue to rise in AGRA focus (1) countries with an increasing rate of cases recorded in most AGRA focus countries - especially Nigeria and Ghana
- Donors – including the African Development Bank – are deepening support to the ag sector as the economic impact of COVID-19 threatens to devastate economies for years in sub Saharan Africa and around the world
- Countries are easing COVID-19 restrictions gradually, allowing agriculture and business to resume
- AGRA's [May Food Security Monitor](#) reports there are continuing food shortage crises across sub Saharan Africa, and commodity prices continue to increase - confirming the need for governments to increase efficiency at borders to facilitate regional food trade.
- AGRA'S COVID-19 "at a glance" by focus country & financial resources committed that AGRA is aware of

AGRA's third Food Security Monitor

Released on June 8, the highlights for West Africa include:

- Grain prices remained stable with some increases in conflict-affected areas over the past month.
- The disruption of informal and small-scale cross border trade activities has reduced the effective food demand as a result of lost incomes as COVID-19 pandemic containment measures persisted across the region.
- The region is expected to experience normal to above normal seasonal rainfall performance through to the end of June, which will be beneficial to the cropping season that is underway.
- Food stocks were generally low in most West African AGRA-focus countries with consumption levels exceeding production levels for the month.

Monitoring food production, stocks and prices

Fertilizer is a derived demand. Therefore; in assessing fertilizers within the pandemic, we must look at the situation of the food markets from which the fertilizer demand is derived. Some tools and resources that helped us in making these assessments are listed below.

LES CEREALIERES

Bulletin économique sur le marché des céréales en Afrique

Numéro 46 - Mai 2020 - Contact : reacwagn@nkalé.com - blog : <https://reac-wagn.blogspot.fr>

En partenariat avec **nkalé**

Editorial : Validation du document de la phase 3 du Programme régional d'appui aux organisations professionnelles et paysannes agricoles (PROAP)

Le 27 Mai 2020, s'est tenue par visioconférence, la réunion de validation du document (PROOC) de la phase 3 du Programme Régional d'Appui aux Organisations Professionnelles et paysannes agricoles (PROAP) dans le cadre de la mise en œuvre de la politique agricole de l'Afrique de l'Ouest (ECOWAP-PODA).

Cette rencontre, sous la direction de la CEDEAO a permis de rassembler la Commission, la BDC, l'UEMOA, le CSAC, le Hub rural, le COGAP, la CEDEAO et les 12 Organisations Professionnelles Régionales (OPR) dont le ROAC.

Cette nouvelle phase du programme prend en compte les leçons apprises et les nouveaux défis émergents, vise à permettre aux organisations professionnelles agricoles isolées au niveau sous régional de contribuer à la sécurité alimentaire et à l'amélioration des conditions de vie de la population rurale et des couches marginales notamment des femmes et des jeunes en Afrique de l'Ouest dans le cadre de la mise en œuvre de la politique agricole régionale.

Au nombre des priorités prises en compte, on note la promotion de l'exploitation familiale, le renforcement des capacités des 12 OPRs, le renforcement des capacités opérationnelles de l'ARAA, la structuration des filières prioritaires du secteur Agro-Pastoral Halieutique et Aquaculture (APHA), la promotion de la concertation et coordination entre les OPRs et l'employabilité des jeunes dans le secteur APHA. Les activités du PROOC débuteront probablement en 2021.

Le Secrétaire Exécutif

Une publication du Réseau Ouest-africain des Céréaliers, réalisée avec l'appui technique du Service n°101 (www.nkalé.com) et le soutien financier du Centre technique de coopération agricole et rurale (CTA).

Sommaire :

La situation du marché en bref	1
Principaux produits cibles	2
Le marché du riz	3-4
Le marché du maïs	5-6
Le marché du mil	7-8
Le marché du sorgho	9-10
Somme des stocks de produits	11-14
Accidents et décès	15-16

La situation du marché en bref

Au cours de ce mois de Mai 2020, les mesures prises par les gouvernements en vue de contenir la pandémie du coronavirus ont été amendées. Cette situation a favorisé mieux qu'auparavant un meilleur approvisionnement des marchés. Le mois a coïncidé aussi avec la période du jeûne musulman où la demande en produits céréaliers a connu un accroissement. A cela il faut ajouter les achats institutionnels de la part des organismes étatiques qui contribuent également à accroître la demande. Mais, grâce à la bonne offre, les prix sont restés stables notamment pour le riz et le maïs. Par contre, pour le mil et le sorgho qui sont des produits très prisés pendant cette période, la baisse de l'offre a occasionné quelques hausses de prix en l'occurrence sur les marchés des principaux pays producteurs.

Pour le riz, la tendance est la suivante :

Pour le riz : La tendance a été à la stabilité sur les marchés de la majorité des pays (Sénégal, Guinée, Ghana, Togo, Bénin, Niger). Seuls la Côte d'Ivoire et le Burkina Faso ont enregistré une légère hausse de prix.

Pour le maïs : Mis à part le Sénégal, le Burkina, le Bénin et le Niger qui ont enregistré de légères hausses de prix sur leurs marchés, la tendance a été à la stabilité sur les marchés de l'ensemble des autres pays suivis à savoir la Guinée, la Côte d'Ivoire, le Mali, le Nigeria, le Tchad, le Togo, le Bénin et le Niger.

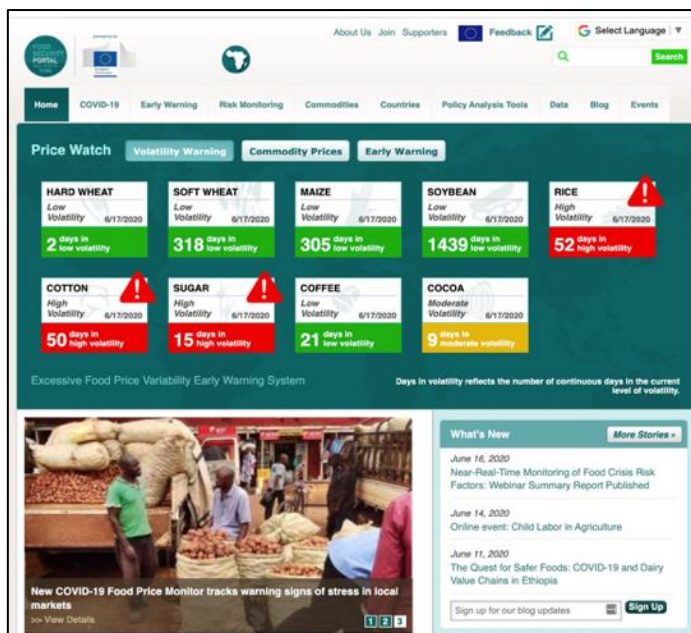
Pour le mil : Pendant que de légères hausses de prix s'observaient sur les marchés du Burkina et du Niger, ce sont des stabilités qui avaient été notées sur les marchés du Sénégal, de la Guinée, de la Côte d'Ivoire, du Ghana, du Togo et du Bénin.

Pour le sorgho : Alors que la tendance était à la stabilité sur les marchés du Sénégal, de la Côte d'Ivoire, du Ghana, du Togo et du Bénin, ce sont de légères hausses qui avaient été notées au Burkina et au Niger.

The West Africa Grain Network

WAGN/ROAC publishes its [Commodity prices](#) and stocks monthly bulletin in West Africa, in partnership with ECOWAS, AGRA, the Food Security Network, and Nitidae

You'll find prices, stocks and market trends and analysis on the main cereal markets (maize, millet, sorghum, rice) in the region.



The Food Security Portal by IFPRI

Volatile food prices, climate-change-driven shocks, conflict, economic downturns, and high population growth continue to raise serious concerns about food security and nutrition in many parts of the world.

The portal provides key data to monitor food security situations and food prices, as well as tools for policy analysis and capacity development – all with the aim of providing policymakers and other stakeholders with the information they need to make appropriate and timely responses to address food insecurity.



The Agricultural Market Information System (AMIS)

In its 12 Jun 2020 release, AMIS reports that, while industrial commodity prices, especially oil, plunged following the spread of COVID-19, prices of staple food commodities have been broadly stable.

Early indications for the 2020/21 season point to abundant food supplies, and by most expectations, stable prices. Yet, there are numerous risks and uncertainties to this outlook

Monitoring Fertilizer Markets in West Africa

The heart of the fertilizer watch was, unsurprisingly, fertilizers. To report on the various aspects of the fertilizer market over the past 10 weeks we relied on the information available internally at IFDC or through partners such as Argus and Afriqom. Next is a short presentation of each of these sources.



AfricaFertilizer.org

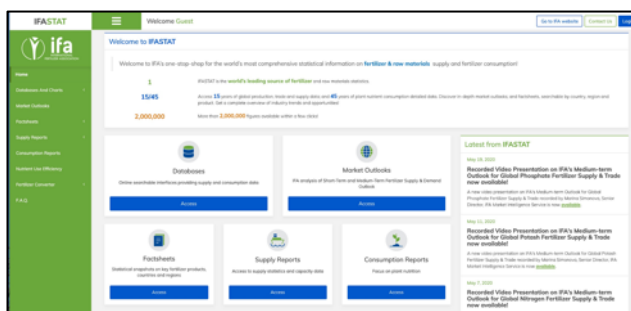
Since 2010, AFO has been monitoring prices every month in 6 countries, including retail prices for main fertilizers both subsidized and unsubsidized, and reporting on other market news.

From late 2019, WAFA is fully engaged in this price and market data collection and publication effort.

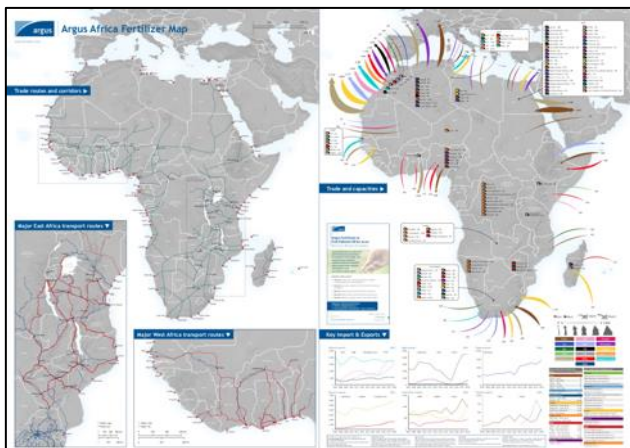
FertiNews is a monthly publication by AfricaFertilizer.org, reaching since 2016 over 3,800 stakeholders across Africa and the world, involved in fertilizer, agro inputs, agricultural and food systems.

As usual, the May edition provides **fertilizer prices and market condition in Sub Saharan Africa**. It revealed that the overall fertilizer market is still going smoothly with the planting season starting in several countries and despite some pockets of concern.

[Read the latest May 2020 update |Subscribe](#)



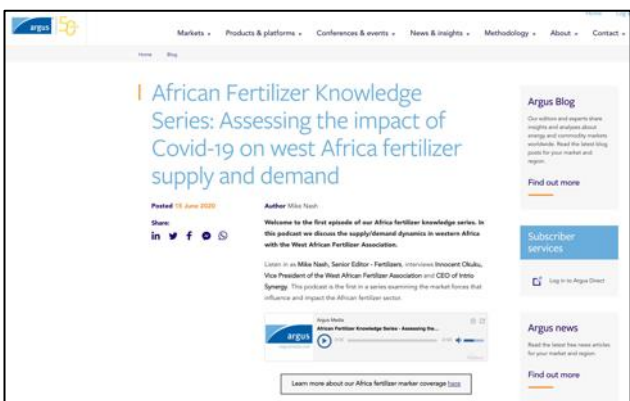
IFASTAT is the International fertilizers Association's one-stop-shop for comprehensive statistical information on **fertilizer & raw materials** supply and fertilizer consumption in the world.



Argus Fertilizer

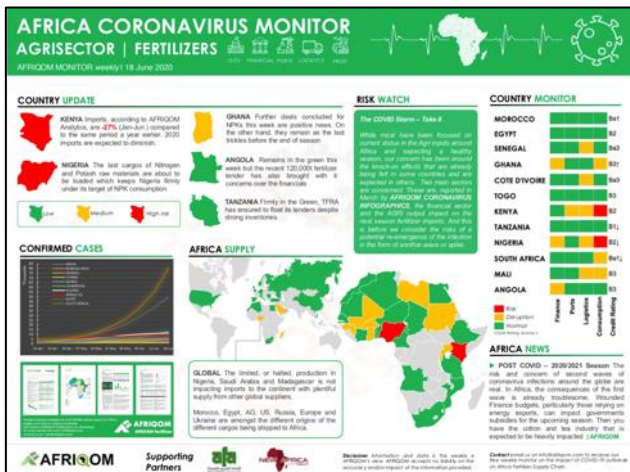
Argus Media publishes several weekly and monthly bulletins on [fertilizer markets and products](#) (nitrogen, phosphates, potash, NPKs), including a monthly Africa Fertilizer Report (paid subscription).

It also offers to its subscribers a fully customizable [ARGUS Direct](#) platform, and a free [Africa Fertilizer Map](#).



You can listen to a recent [podcast](#) where Mike Nash, Senior Editor - Fertilizers at Argus, interviews Innocent Okuku, Vice President of the West African Fertilizer Association.

This podcast is the first in a series examining the market forces that influence and impact the African fertilizer sector.



[Afriqom](#) started recently publishing detailed fertilizer market information with a laser focus on the African market.

Besides their weekly newsletter, and daily alert accessible to paid subscribers, Afriqom publishes a free weekly Africa Coronavirus Monitor to provide information on the impact of the pandemic on the fertilizer market.

About the West Africa Fertilizer Watch

In response to the COVID-19 pandemic, the West Africa Fertilizer Association (WAFA), the International Fertilizer Development Center (IFDC) and its AfricaFertilizer.org (AFO) initiative have launched the West Africa Fertilizer Watch on April 10th, 2020. The West Africa Watch has been greatly appreciated by private sector businesses all along the value chain, public sector and development partners responsible for policy and food security interventions, including Government Ministries, Regional Economic Communities (ECOWAS, CILSS, UEMOA), and the African Union as a valuable tool to monitor actions and analyze data to help in decision making related to fertilizer availability and use.

More info on [IFDC website](#)



An independent non-profit organization, IFDC works throughout Africa and Asia to increase soil fertility and develop inclusive market systems. Combining science-backed innovations, an enabling policy environment, holistic market systems development, and strategic partnerships, the organization bridges the gap between identifying and scaling sustainable agricultural solutions, resulting in improved household food security and enriched family livelihoods around the world. Using an inclusive approach, IFDC employs locally driven solutions that are environmentally sound and impact oriented that bring change at local, regional, and national levels.

About WAFA, IFDC & AfricaFertilizer.org



The West African Fertilizer Association (WAFA) is a non-profit private sector initiative established to address the challenges of the

fertilizer industry in West Africa. Representing all the ECOWAS countries, the member companies combine resources to find solutions to market challenges and promote best practices in fertilizer production and use in order to optimize the region's potential for crop production and food security. Established in 2016, the association has 58 member companies in 11 different countries.



The AfricaFertilizer.org (AFO) initiative is the premier source for fertilizer statistics and information in Africa. It is hosted by IFDC and supported by several partners, key among them being IFA, Argus Media, and Development Gateway. Since 2009, AFO has been collecting, processing, and publishing fertilizer production, trade, and consumption statistics for the main fertilizer markets in sub-Saharan Africa. AFO has an extensive network of fertilizer industry players in the main fertilizer trade corridors and maintains key information on the major producers, their production facilities and capacities, importers/suppliers, various distribution channels, and agricultural service suppliers (laboratory services, research, credit providers, and warehousing/storage services).

