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## Key Highlights

- Montepuez exhibits the most considerable strain on purchasing power with the cost of the food basket being +25% above the transfer value. In contrast, Cidade De Pemba faces the least strain with the food basket cost at +4% over the transfer value. Mocimboa Da Praia demonstrated the highest purchasing power with the daily minimum wage buying 4.5 kg of maize meal, while Ancuabe had the lowest at 2.8 kg.
- Looking at available Consumer Price Index Data, inflation saw in November 2023 saw a month-on-month increase of 0.6%, and an increase of 4.5% compared to the previous year. Food inflation also rose to 4.5% in October 2023 compared to the previous year.
- Prices of maize flour (+25%) and cowpeas (+20%) significantly increased within a month. Partial increases were seen in rice, wheat flour, Kale, catarino beans, and sugar. Prices of vegetable oil, butter beans, peanuts, and eggs remained stable. Notably, over a three-month period, Kale (+38%) and maize meal (+30%) prices increased considerably.

### Context

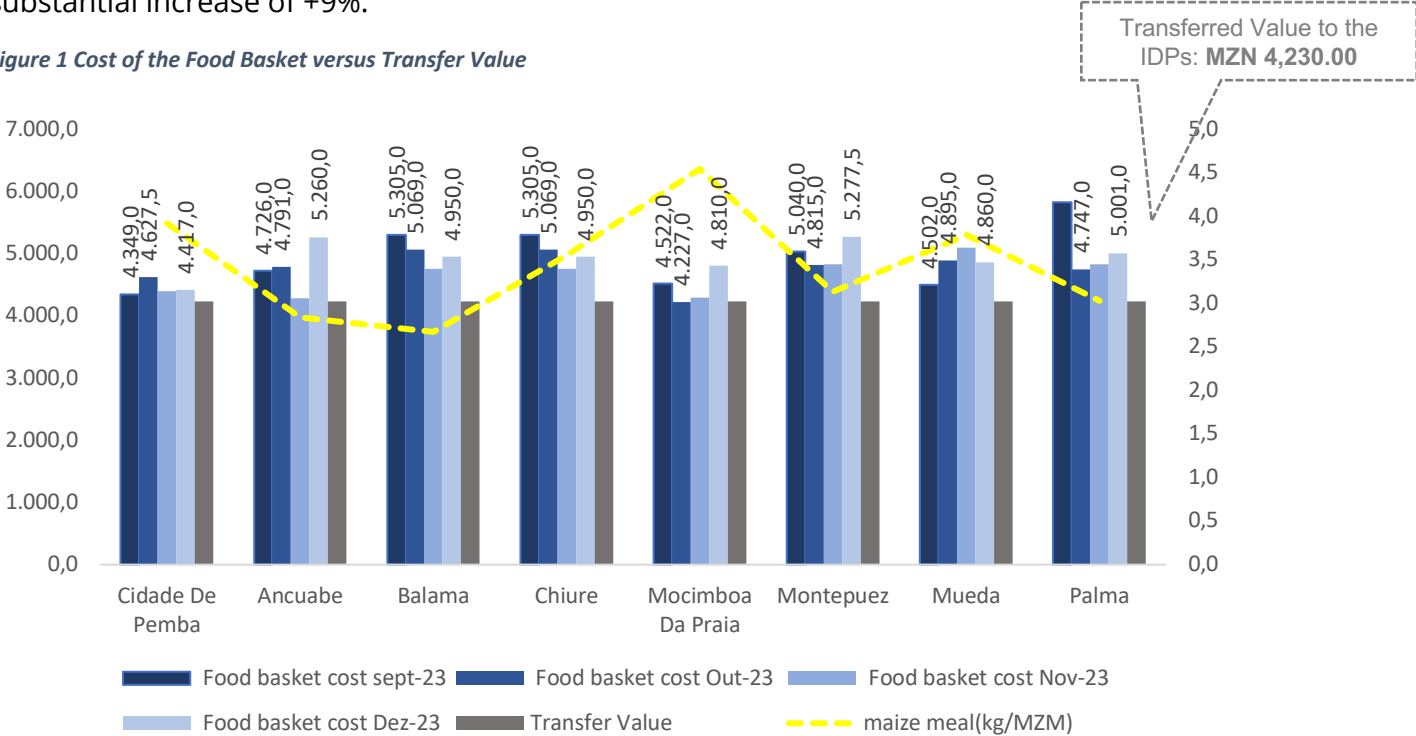
Security conditions have improved in recent months, but in December 2023 there were some attacks in some districts of the northern region, provoked by INSAG, which led to the displacement of the population in those areas. On the other hand, the rains that began in December could cause access problems in some areas due to the poor condition of some roads. In general, most of the seeds were sown in December due to the low rainfall in November.

### 1. Food basket and Purchasing Power analysis.

Regarding the comparison to the present transfer value, Montepuez experiences the highest discrepancy, with the food basket cost being +25% above the transfer value, indicating the most significant strain relative to the set transfer value. Conversely, Cidade De Pemba has the smallest increase over the transfer value at just +4%, suggesting a minor strain.

Looking at the month-to-month comparison of the overall basket cost - There was a decrease of -4% in September compared to August. This was followed by a slight increase of +3% in November from October's costs. A decrease of -1% was observed in December from November. However, the overall change from the previous month to December shows a substantial increase of +9%.

Figure 1 Cost of the Food Basket versus Transfer Value

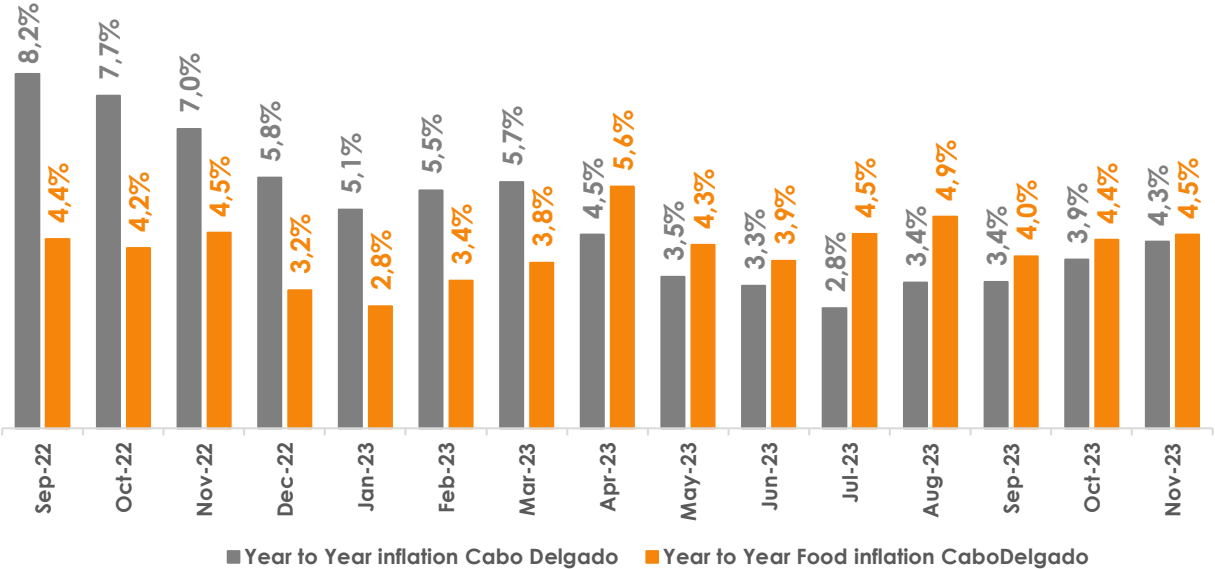


In terms of purchasing power, which is the quantity (Kg) of maize meal that can be bought with the daily minimum wage - Mocimboa Da Praia stands out with better purchasing power, where the daily minimum wage can buy 4.5 kg of maize meal. On the other end, Ancuabe has the least purchasing power, with the daily minimum wage only buying 2.8 kg of maize meal.

## 2. Inflation rate analysis

Inflation based on the Consumer Price Index (CPI) in Cabo Delgado increased in November 2023 by 0.6% compared to October 2023 (month-on-month), while year-on-year inflation based on the CPI increased by 4.5%. Food inflation in October 2023 also registered an increase to 4.5% from 4.4% in September, when compared to the previous year.

Figure 2 Inflation over time



### 3. Commodity price trends in Cabo Delgado and District variations

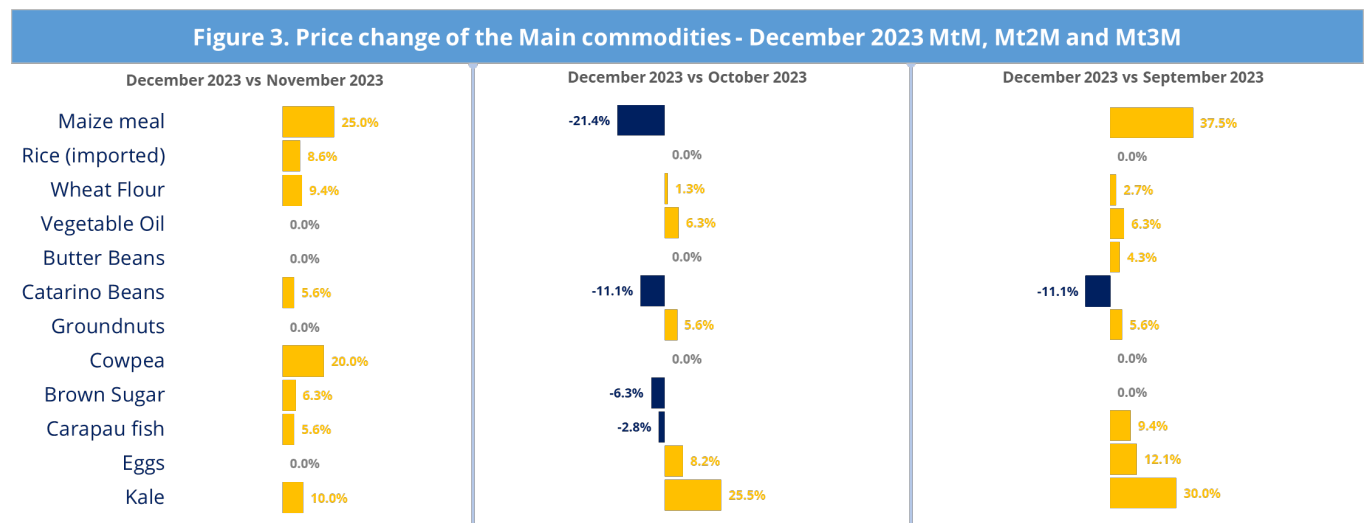
#### 3.1. Provincial-level overall price trends

In December 2023, the retail market of Cabo Delgado experienced a discernible trend towards increasing prices for several basic commodities. Notably, there were marked increases in the prices of maize flour by +25%, and cowpeas by +20% within a one-month span. These commodities, along with rice, wheat flour, Kale, Catarino beans, and sugar, exhibited partial increases, suggesting a lean season impact, possibly exacerbated by heightened demand over the festive period. Moreover, the ongoing security situation likely continued to exert influence over market dynamics.

Stability was observed in the prices of vegetable oil, butter beans, peanuts, and eggs, with no notable change reported. However, when looking back two months, maize meal prices stand out with a significant increase of +25%, whereas Kale and peanuts experienced sharp declines, indicating a shift in market availability or consumer patterns.

Over a three-month period, the trends show a considerable rise in the prices of Kale and maize meal, registering increases of +38% and +30% respectively. These commodities, essential to the local diet, reflect a more extended pattern of inflationary pressures that may affect food security and necessitate careful monitoring in the coming months."

Figure 3 Price changes of different commodities in Cabo Delgado province

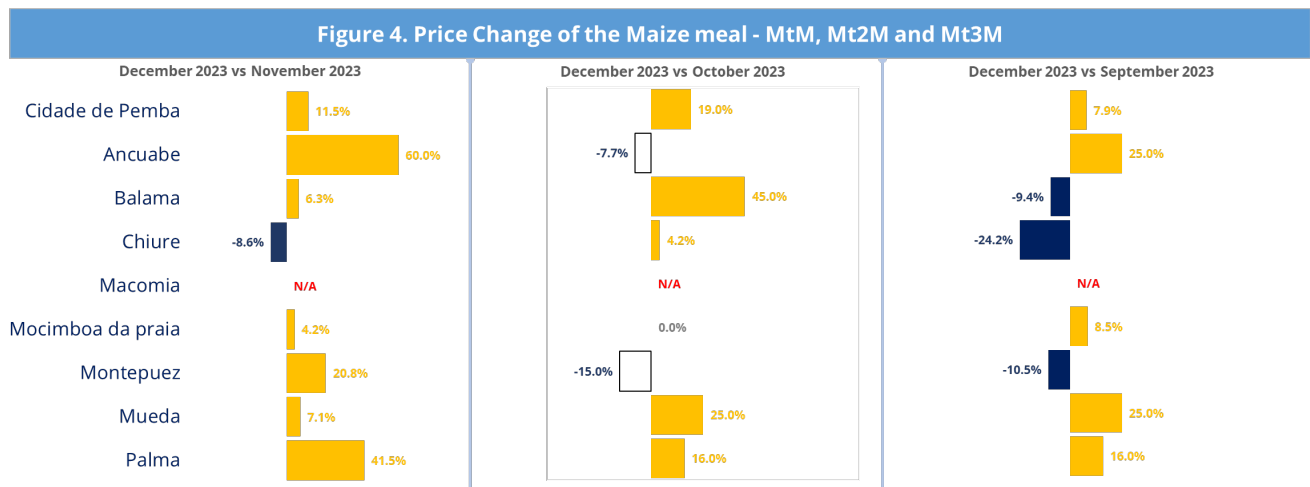


## 3.2. District price trends

### 3.2.1. Maize Meal flour (local)

Ancuabe's Maize Meal price surged to 80 MZN, up by a staggering +60% from November and maintaining high increases from both October and September (+25% each). Montepuez also saw a significant rise to 73 MZN, with a +20.8% increase from November and a considerable +45% from October, despite a -9.4% drop from September. The highest price was in Ancuabe at 80 MZN, with the lowest in Mueda at 60 MZN. The overall price in the province was 65 MZN, continuing to rise throughout the reporting months.

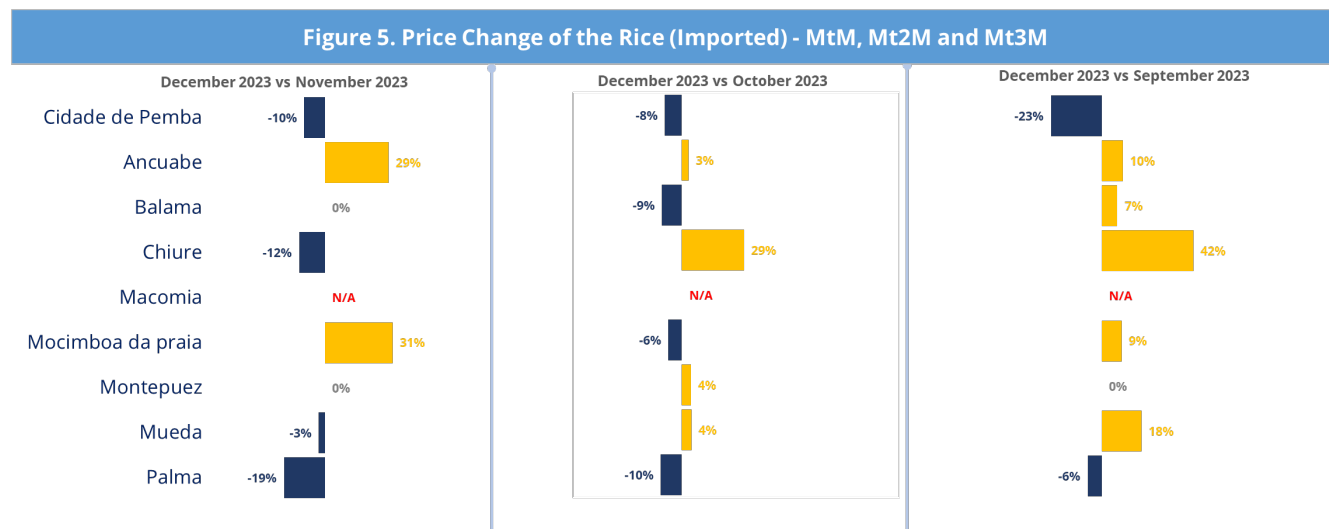
Figure 4 Maize flour price changes across districts of Cabo Delgado



### 3.2.2. Rice (imported)

Mocimboa Da Praia's price for imported Rice rose sharply to 72 MZN, with increases of +30.9% from November, +28.6% from October, and +42.3% from September. A sharp increase (+29.1%) was also observed for Ancuabe in December compared to November. The highest price was observed in Mocimboa Da Praia at 72 MZN, whereas the lowest was in Montepuez at 60 MZN. Across Cabo Delgado, the overall price stood at 66 MZN, showing a consistent rise over the reporting period.

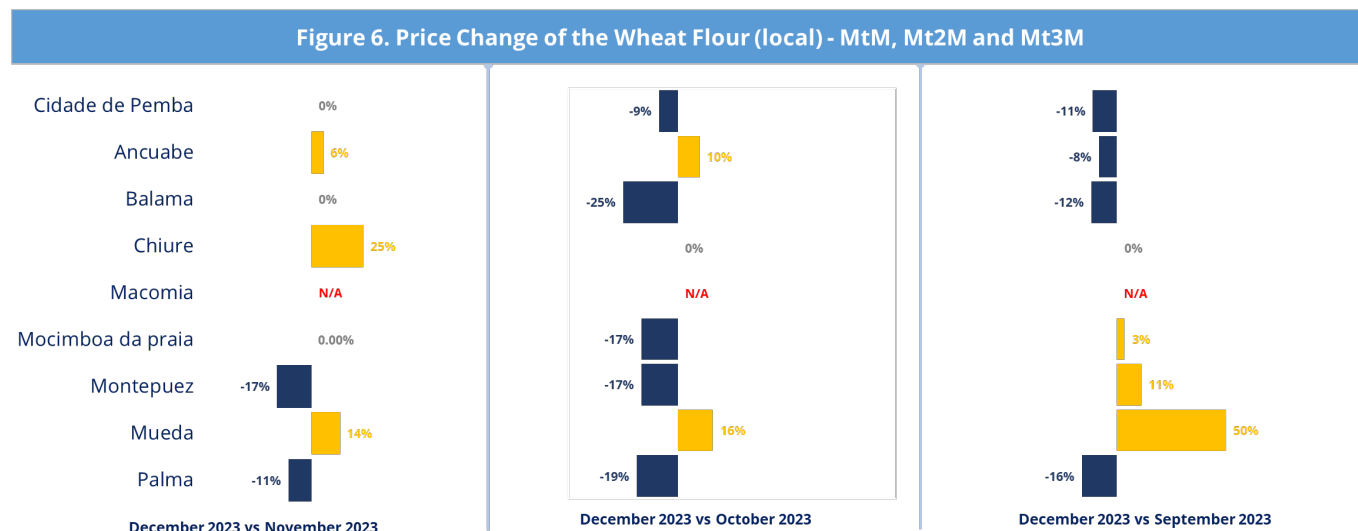
Figure 5 Rice (imported) price changes across districts of Cabo Delgado



### 3.2.3. Wheat Flour (local)

In Ancuabe, the price of local Wheat Flour saw a substantial increase, reaching 90 MZN, which is a +5.9% rise from November 2023 and more pronounced over two (+16.1%) and three (+50%) months. Chiúre saw a sudden +25% increase in December compared to the previous month. Conversely, Montepuez and Palma experienced notable decreases to 75 MZN (-16.7%, -25%, -11.8%) and 80 MZN (-11.1%, -8.6%, -11.1%), respectively. The highest price for Wheat Flour was in Balama and Mocimboa da Praia at 100 MZN, while the lowest was in Cidade De Pemba at 65 MZN. Overall, the price stood at 88 MZN, marking a +9.4% increase from November.

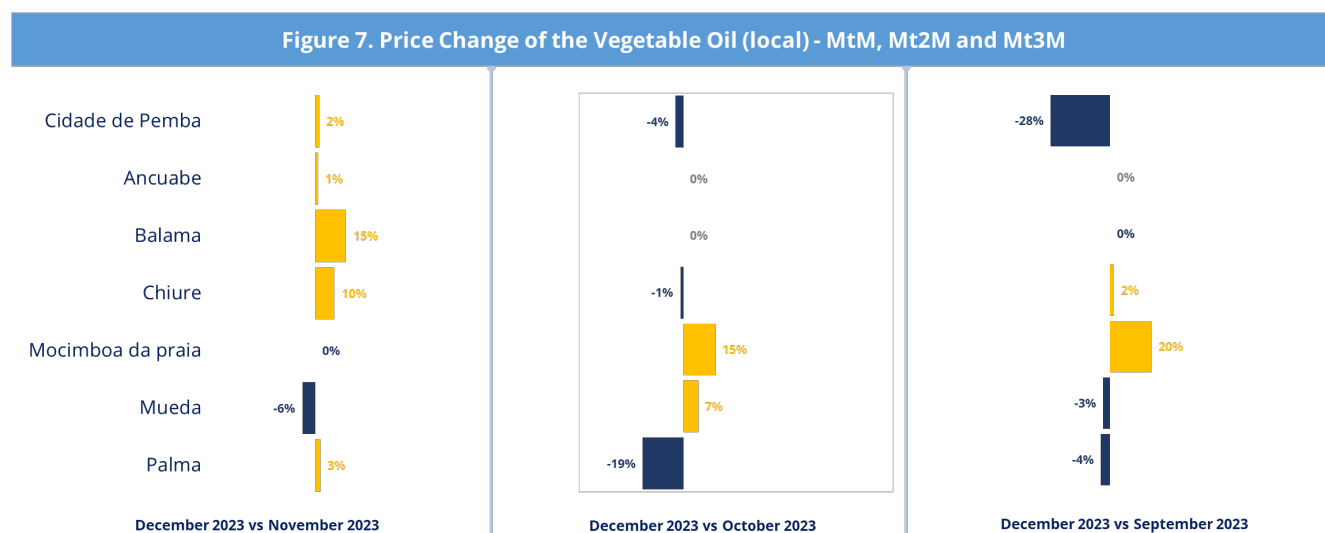
Figure 6 Wheat flour price changes across districts of Cabo Delgado



### 3.2.4. Vegetable Oil

Balama saw a consistent price rise in local Vegetable Oil, reaching 150 MZN with a +15.4% increase each month over the quarter. The highest price for Vegetable Oil was in Montepuez at 170 MZN, while the lowest was in Chiüre at 148 MZN. Overall, the price stood at 150 MZN.

Figure 7 Vegetable oil price changes across districts of Cabo Delgado



#### Research, Analysis and Monitoring (RAM) team – WFP Mozambique:

Francesco Stompanato [francesco.stompanato@wfp.org](mailto:francesco.stompanato@wfp.org)

Mahathir Sarker [mahathir.sarker@wfp.org](mailto:mahathir.sarker@wfp.org)

Panfilio Malamule [panfilio.malamule@wfp.org](mailto:panfilio.malamule@wfp.org)

Constantino Malate [constantino.malate@wfp.org](mailto:constantino.malate@wfp.org)





**Annex I: Prices of key commodities in December 2023 compared with November, October, and September 2023**

Commodities List	Province	Current price	Price Change			Commodities List	Province	Current price	Price Change		
			1 Month (%)	2 Month (%)	3 Month (%)				1 Month (%)	2 Month (%)	3 Month (%)
Wheat Flour (Local)	Overall	88	9.4% ▲	-2.8% ▼	9.4% ▲	Rice (Imported)	Overall	66	8.6% ▲	8.2% ▲	12.1% ▲
	Cidade De Pemba	65	0.0%	-18.8% ▼	-16.1% ▼		Cidade De Pemba	55	-9.5% ▼	-9.8% ▼	-6.5% ▼
	Ancuabe	90	5.9% ▲	16.1% ▲	50.0% ▲		Ancuabe	71	29.1% ▲	4.4% ▲	18.3% ▲
	Balama	100	0.0%	-16.7% ▼	11.1% ▲		Balama	55	0.0%	4.2% ▲	0.0%
	Chiure	75	25.0% ▲	-16.7% ▼	3.4% ▲		Chiure	60	-11.8% ▼	-6.3% ▼	9.1% ▲
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	100	0.0%	0.0%	0.0%		Mocimboa Da Praia	72	30.9% ▲	28.6% ▲	42.3% ▲
	Montepuez	75	-16.7% ▼	-25.0% ▼	-11.8% ▼		Montepuez	60	0.0%	-9.1% ▼	7.1% ▲
	Mueda	83	13.8% ▲	10.0% ▲	-8.3% ▼		Mueda	68	-2.9% ▼	3.0% ▲	9.7% ▲
	Palma	80	-11.1% ▼	-8.6% ▼	-11.1% ▼		Palma	55	-18.8% ▼	-8.0% ▼	-23.3% ▼
Maize Meal (1st Grade)	Overall	65	25.0% ▲	25.5% ▲	30.0% ▲	Butter Beans	Overall	90	0.0%	0.0%	0.0%
	Cidade De Pemba	58	11.5% ▲	16.0% ▲	16.0% ▲		Cidade De Pemba	85	6.3% ▲	0.0%	6.3% ▲
	Ancuabe	80	60.0% ▲	25.0% ▲	25.0% ▲		Ancuabe	83	-8.3% ▼	3.1% ▲	-8.3% ▼
	Balama	85	6.3% ▲	-15.0% ▼	-10.5% ▼		Balama	90	0.0%	0.0%	-23.4% ▼
	Chiure	64	-8.6% ▼	0.0%	8.5% ▲		Chiure	90	0.0%	5.9% ▲	-10.0% ▼
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	50	4.2% ▲	4.2% ▲	-24.2% ▼		Mocimboa Da Praia	80	0.0%	0.0%	0.0%
	Montepuez	73	20.8% ▲	45.0% ▲	-9.4% ▼		Montepuez	120	20.0% ▲	26.3% ▲	20.0% ▲
	Mueda	60	7.1% ▲	-7.7% ▼	25.0% ▲		Mueda	90	-18.2% ▼	0.0%	0.0%
	Nangade	-	-	-	-		Nangade	-	-	-	-
Kale	Overall	55	10.0% ▲	-21.4% ▼	37.5% ▲	Catarino Beans	Overall	95	5.6% ▲	5.6% ▲	5.6% ▲
	Cidade De Pemba	60	20.0% ▲	-7.7% ▼	14.3% ▲		Cidade De Pemba	85	-2.9% ▼	-10.5% ▼	-8.1% ▼
	Ancuabe	50	25.0% ▲	0.0%	11.1% ▲		Ancuabe	95	-	5.6% ▲	5.6% ▲
	Balama	-	-	-	-		Balama	95	11.8% ▲	11.8% ▲	5.6% ▲
	Chiure	50	-9.1% ▼	11.1% ▲	25.0% ▲		Chiure	98	-	-	96.0% ▲
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	-	-	-	-		Mocimboa Da Praia	-	-	-	-
	Montepuez	70	0.0%	7.7% ▲	-		Montepuez	90	-10.0% ▼	-	-
	Mueda	65	-35.0% ▼	-53.6% ▼	225.0% ▲		Mueda	-	-	-	-
	Palma	25	-28.6% ▼	-68.8% ▼	-37.5% ▼		Palma	110	10.0% ▲	10.0% ▲	22.2% ▲
Vegetable Oil (Local)	Overall	150	0.0%	-6.3% ▼	0.0%	Groundnuts (small, without shell)	Overall	80	0.0%	-11.1% ▼	-11.1% ▼
	Cidade De Pemba	153	2.0% ▲	-19.5% ▼	-4.4% ▼		Cidade De Pemba	85	25.9% ▲	13.3% ▲	21.4% ▲
	Ancuabe	150	1.4% ▲	7.1% ▲	-3.2% ▼		Ancuabe	75	-6.3% ▼	-21.1% ▼	-25.0% ▼
	Balama	150	15.4% ▲	15.4% ▲	20.0% ▲		Balama	50	-9.1% ▼	-	-28.6% ▼
	Chiure	148	9.6% ▲	-1.3% ▼	2.1% ▲		Chiure	120	20.0% ▲	0.0%	26.3% ▲
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	160	-11.1% ▼	0.0%	-5.9% ▼		Mocimboa Da Praia	100	0.0%	0.0%	5.3% ▲
	Montepuez	170	0.0%	-5.6% ▼	6.3% ▲		Montepuez	63	-37.5% ▼	-24.2% ▼	-
	Mueda	150	-6.3% ▼	0.0%	0.0%		Mueda	95	35.7% ▲	5.6% ▲	-5.0% ▼
	Palma	154	2.7% ▲	-3.8% ▼	-28.4% ▼		Palma	-	-	-	-
Carapau Fish	Overall	190	5.6% ▲	1.3% ▲	2.7% ▲	Egg	Overall	10	0.0%	0.0%	0.0%
	Cidade De Pemba	185	23.3% ▲	23.3% ▲	2.8% ▲		Cidade De Pemba	10	0.0%	5.3% ▲	7.1% ▲
	Ancuabe	100	-50.0% ▼	-50.0% ▼	-50.0% ▼		Ancuabe	10	3.4% ▲	0.0%	0.0%
	Balama	180	1.4% ▲	0.0%	-10.0% ▼		Balama	8	-3.8% ▼	-16.7% ▼	-16.7% ▼
	Chiure	160	-5.9% ▼	-5.9% ▼	-5.9% ▼		Chiure	8	0.0%	-16.7% ▼	-2.0% ▼
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	300	20.0% ▲	20.0% ▲	20.0% ▲		Mocimboa Da Praia	13	0.0%	33.3% ▲	0.0%
	Montepuez	195	0.0%	-1.3% ▼	2.6% ▲		Montepuez	9	-10.0% ▼	-15.6% ▼	-3.6% ▼
	Mueda	250	-28.6% ▼	0.0%	29.9% ▲		Mueda	10	-6.2% ▼	0.0%	-14.3% ▼
	Muidumbe	-	-	-	-		Muidumbe	-	-	-	-
Brown Sugar (Local)	Overall	85	6.3% ▲	6.3% ▲	6.3% ▲	Cowpeas	Overall	60	20.0% ▲	0.0%	4.3% ▲
	Cidade De Pemba	85	13.3% ▲	6.3% ▲	3.0% ▲		Cidade De Pemba	70	47.4% ▲	55.6% ▲	40.0% ▲
	Ancuabe	85	9.7% ▲	6.3% ▲	6.3% ▲		Ancuabe	50	0.0%	0.0%	-33.3% ▼
	Balama	80	0.0%	6.7% ▲	6.7% ▲		Balama	50	11.1% ▲	0.0%	-9.1% ▼
	Chiure	90	12.5% ▲	9.1% ▲	20.0% ▲		Chiure	45	-10.0% ▼	-10.0% ▼	-10.0% ▼
	Macomia	-	-	-	-		Macomia	-	-	-	-
	Mocimboa Da Praia	100	0.0%	0.0%	25.0% ▲		Mocimboa Da Praia	50	0.0%	-16.7% ▼	-16.7% ▼
	Montepuez	80	-8.6% ▼	-15.8% ▼	-3.0% ▼		Montepuez	70	3.7% ▲	3.7% ▲	-
	Mueda	83	-2.9% ▼	-2.9% ▼	-2.9% ▼		Mueda	60	-7.7% ▼	-14.3% ▼	-33.3% ▼
	Palma	80	0.0%	0.0%	-11.1% ▼		Palma	90	-10.0% ▼	0.0%	-