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FOOD SECURITY MONITOR

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The monthly Food Security Monitor is a critical tool for stakeholders across the African agricultural landscape. This report equips policymakers, practitioners, and the wider community with vital insights to navigate challenges, prioritise interventions, and ultimately build a more food-secure future for all. This 56th edition overviews the food security situation and market prices across East, South, and West Africa.

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Summary

Our monthly Food Security Monitor is one way AGRA makes data available to key stakeholders to underpin evidence-based decision-making. Highlights from the March 2025 Food Security Monitor are summarised below:

Food Commodity Prices Updates

Ethiopia registered the lowest price for maize across five **East African** countries, at USD 291/MT, while Kenya has the highest price at USD 452/MT. In local currency, the price of maize is well above what was recorded a year ago, except in Ethiopia, where it dropped by 4.52%. The price fluctuations were primarily influenced by stock shortages caused by seasonal variations and high demand for maize from the southern region.

In **Southern Africa**, price of Maize increased in both Zambia and Malawi by 22% and 15% month-on-month to USD 371/MT and USD 966/Mt respectively. The price shock in Zambia is attributed to stock depletion from the cereal imports from neighbouring Tanzania, coupled with an increase in electricity tariffs in response to power shortages. In Malawi, constrained domestic and regional supply across Southern Africa, currency depreciation and shortage of forex have contributed to increased processing and distribution costs due to higher prices of key imported inputs like fuel. As a result, the Government of Malawi has prohibited the importation of select commodities, including cereals, horticulture crops and dairy products, among others.

In **West Africa**, Nigeria recorded the lowest maize price at USD 347/MT in March 2025, down from USD 375/Mt in February 2025. Conversely, Togo has the highest maize price at USD 495/MT, up from USD 478/Mt. The decline in maize prices in Nigeria when measured in USD mirrors the trends observed in local currencies, with prices falling by 5.16% and 9.72% over the past one and three months, respectively. Overall, maize prices have begun to decline compared to the past three months driven by increased supplies from recent harvests. The onset of Ramadan compelled farmers to sell their newly harvested crops to purchase essential items, contributing to the decrease in prices in the region. Meanwhile, rice prices have risen compared to March 2024 in most parts of the region, except in Niger markets, where prices have declined by 6% to 13%, supported by above-average cereal production in 2024.

Food Security Updates

Like February, the prevalence of insufficient food consumption (IFC) remained unchanged in March in all monitored countries across East, Southern, and West Africa, except Nigeria which recorded a 0.73% improvement, equivalent to 700,000 people. Over the past six months, the list of countries identified as food insecurity hotspots, where over 50% of the population experiences IFC, has remained unchanged: Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%). The incidence of IFC has also remained stable in majority of the monitored countries across the continent, compared to a year ago, with notable declines in Nigeria and Zimbabwe by 5.78% and 18.18%, respectively. However, Ghana, Rwanda, South Sudan, Togo, and Uganda have experienced significant increases. Uganda recorded the largest increase in IFC, rising by 116.87% from 8.3 million people in March 2024 to 18 million people in March 2025. This is attributed to conflicts and insecurity in some parts of the country and neighbouring countries, driving the influx of refugees into Uganda, and persistent weather shocks which reduced crop outputs.

Food Trade Updates

- The Pan-African Payment and Settlement System (PAPSS), initiated by the African Export-Import Bank (Afreximbank) in partnership with the African Union Commission (AUC) and the African Continental Free Trade Area (AfCFTA) Secretariat, has seen a significant advancement with its official launch by KCB Group in Kenya and Bank of Kigali in Rwanda. These launches mark the first integration of PAPSS by banks in their respective countries, highlighting their dedication to promoting intra-African trade and supporting AfCFTA's initiatives.
- The Tanzania Plant Health and Pesticides Authority (TPHPA) has raised phytosanitary certificate fees by 460%, creating significant challenges for the country's agricultural export sector. Previously, exporters paid Tsh58,347 for phytosanitary certification and inspection of a container consignment. Under the revised fees, the charges rise to Tsh331,320 comprising Tsh201,320 for inspection and Tsh130,000 for certification, applicable to consignments over 1,000 kilograms. The increased fees threaten the competitiveness of local agricultural products compared to its regional peers. For instance, the phytosanitary certificate costs just 200 Rwandan francs (Tsh364.1) in Rwanda, 5,000 Ugandan shillings (Tsh3,348) in Uganda, and Ksh 600 (Tsh11,880) in Kenya.
- The Government of Malawi has prohibited the importation of various commodities including selected vegetables, maize flour, fresh milk, peanut butter, meat products, honey, popcorn, Irish potatoes, garlic, ginger, and onions, among others. This measure, which shall be in effect till March 2027, aims to protect local industries, stimulate local production, create jobs, and foster the economic empowerment of Malawians.
- Mali, Burkina Faso, and Niger, all currently under military rule, have introduced a new 0.5% levy on imported goods from Nigeria and other Economic Community of West African States (ECOWAS) member nations. This move aims to finance a newly formed three-state union following their departure from the larger regional economic bloc.

Introduction

The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications on food trade, and food and nutrition security. The discussions presented here focus on selected countries of interest to the AGRA Regional Food Trade and Resilience Initiative: East Africa (Ethiopia, Kenya, South Sudan, Rwanda, Tanzania and Uganda), Southern Africa (Malawi, Mozambique, Zambia and Zimbabwe), and West Africa (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Niger, Nigeria and Togo).

Food Security Dashboard

The Food Security Dashboard (Table 1 and Figure 1) offers a summary of the fluctuations in the number of people experiencing Insufficient Food Consumption (IFC)¹, highlights hunger hotspots and tracks average changes in food prices over the past year. Figure 1 illustrates the prevalence of IFC in March 2025 across 17 countries in Eastern, Southern, and Western Africa.

In March 2025, the list of countries identified as food insecurity hotspots, where over 50% of the population experiences IFC, remained unchanged. These countries include Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%). Other countries with scores close to this threshold are South Sudan (44.5%), Uganda (42.2%), and Nigeria (46.6%). Only Nigeria experienced a drop in IPC by 0.73%, from 95.3 million people in February to 94.6 million people. Compared to a year ago, Nigeria and Zimbabwe saw declines of 5.78% and 18.18%, respectively. Meanwhile, Ghana, Rwanda, South Sudan, Togo, and Uganda have experienced significant increases in the number of people with IFC.

Uganda experienced the largest increase in IFC, rising by 116.87% from 8.3 million people in March 2024 to 18 million people in March 2025. This surge is likely due to a combination of factors such as conflicts and insecurity in some parts of the country and neighbouring countries, driving the influx of refugees into Uganda, and persistent weather shocks which reduced crop outputs.

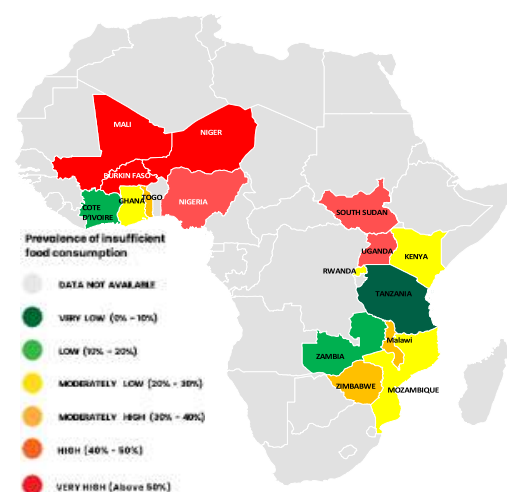
Regarding average commodity prices, Ethiopia and Togo saw a decrease in the national average prices (in local currencies) of maize, while Mali and Niger saw a decline in their national average price of rice compared to six months ago. Malawi and South Sudan experienced the largest increase compared to six months ago by 109.3% and 73.61% respectively. Compared to a year ago, the national average price of maize had declined in Ethiopia by 4.52%, while the national average price of rice had declined by 8.93% in Niger. Again, Malawi and South Sudan show the most significant increases by 116.59% and 319.01% respectively.

Table 1: IFC and Commodities Price (Local Currency) Changes

Country	Change (%) in people with insufficient food consumption from last 1 Month	Change (%) in people with insufficient food consumption from last 1 year	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	0.00	0.00	6.11	10.51
Cote d'Ivoire	0.00	0.00		
Ethiopia			-7.56	-4.52
Ghana	0.00	58.49		
Kenya	0.00	0.00	16.65	22.62
Malawi	0.00	0.00	109.22	116.59
Mali*	0.00	0.00	-10.24	4.46
Mozambique	0.00	0.00		
Niger	0.00	0.00	-8.84	-8.93
Nigeria	-0.73	-5.78		
Rwanda	0.00	38.46	19.89	62.75
South Sudan	0.00	53.13	73.61	319.01
Tanzania	0.00	0.00	41.67	21.43
Togo	0.00	42.11	-0.93	9.57
Uganda	0.00	116.87	24.58	18.13
Zambia	0.00	0.00	25.54	13.51
Zimbabwe	0.00	-18.18		

Key: ● No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, February 2025



¹ People with Insufficient Food Consumption (IFC) refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS). The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets and how frequently food is consumed. The FCS is calculated using the frequency of consumption of eight food groups by a household over seven days before the survey, using standardised weights for each food group reflecting its respective nutrient density. It then classifies households as having 'poor', 'borderline' or 'acceptable' food consumption. Poor food consumption typically refers to households that do not consume staples and vegetables every day and never, or very seldom, consume protein-rich food such as meat and dairy (FCS of less than 28). Borderline food consumption typically refers to households that consume staples and vegetables every day, accompanied by oils and pulses a few times a week (FCS of less than 42). Acceptable food consumption typically refers to households that consume staples and vegetables every day, frequently accompanied by oils and pulses, and occasionally meat, fish and dairy (FCS greater than 42).

Global Market Update

In March 2025, the FAO Food Price Index (FFPI), which measures the monthly change in international prices of a basket of food commodities, remained nearly unchanged from February (Figure 2). This was driven by declines in the price indices for cereals and sugar, which were offset by increases in meat and vegetable oils prices, while the dairy price index remained stable. Both maize and wheat prices declined in March due to easing concerns over crop conditions in some major Northern Hemisphere exporters, improved crop conditions in Brazil with recent rainfall, the start of the harvest in Argentina, Türkiye's removal of its wheat import quota, bearish projections for the coming season in the United States of America, weaker-than-anticipated import demand from China, among other factors.² On the other hand, the International Grain Council's (IGC) Grain and Oil Index (GOI) shows a 4.98% dip compared to a year ago. Similarly, the sub-indices of rice and soyabeans saw a dip of 28.57% and 8.73% respectively. On the other hand, the sub-indices of wheat, maize, and barley increased by 0.72%, 15.68%, and 11.91% respectively.

Figure 2: FAO Food Price Index (FFPI)³

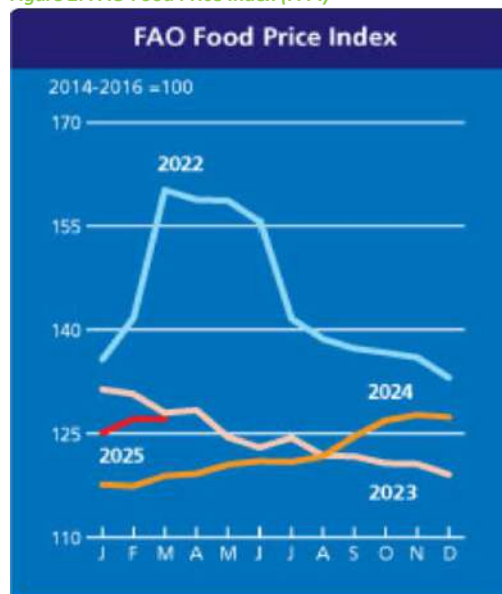


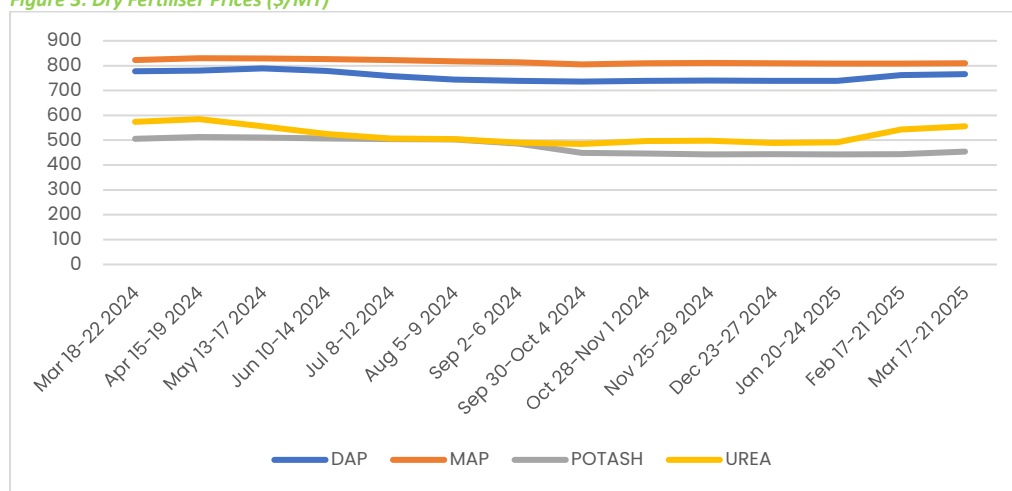
Table 2: IGC GOI Commodity Price Indices⁴

Jan 2000 = 100	31-Mar	% Change 1M	% Change 1Y
GOI	215.90	-	-4.98
Wheat	199.95	0.94	0.72
Maize	231.71	-	15.68
Rice	178.02	-2.21	-28.57
Soyabeans	202.91	0.59	-8.73
Barley	230.71	-	11.91

Global Fertiliser Prices

Over the past month, all monitored fertiliser types (figure 3) have shown price increases, with potash rising by 2.3% and urea by 2.4%. However, compared to the same period last year, the prices of all monitored fertilisers are lower. Potash has experienced the largest decline at 10.3%, followed by urea, MAP, and DAP, which have decreased by 3.1%, 1.6%, and 1.5%, respectively.

Figure 3: Dry Fertiliser Prices (\$/MT)



Source: Author's construction based on DTN⁵

² <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

³ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁴ <https://www.igc.int/en/markets/marketinfo-goi.aspx>

⁵ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/02/05/urea-uan32-lead-fertilizer-prices>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, March 2025

IPC Analyses	Stressed (IPC Phase 2)	Crisis (IPC Phase 3)	Emergency (IPC Phase 4)	Catastrophe (IPC Phase 5)	IPC Phase 3+
Burundi	5,925,208	1,212,374	0	0	1,212,374
CAR	2,752,713	1,663,412	307,271	0	1,970,683
DRC	51,541,000	23,843,000	3,903,000	0	27,746,000
Djibouti ¹	474,720	232,178	52,822	0	285,000
Kenya	6,352,950	1,884,700	265,900	0	2,150,600
Somalia	6,526,000	2,954,000	442,000	0	3,396,000
South Sudan	4,576,000	4,334,000	1,714,000	31,000	6,079,000
Sudan	15,623,989	15,896,148	8,097,626	613,000	24,606,774
Uganda ²	2,408,296	1,327,419	26,485	0	1,353,904
Tanzania ³	1,729,928	379,476	0	0	379,476
Total	97,910,804	53,726,707	14,809,104	644,000	69,179,811
IGAD	35,961,955	26,628,445	10,598,833	644,000	37,871,278

Other food security estimates	
Ethiopia	15.8 million people in need of food assistance (Source: HRP 2024)

Total highly food insecure population in need of assistance*	IGAD caseload: 53.67 million
	Regional caseload: 84.98 million

¹ Valid through December 2024. ² Covers only refugee-hosting communities and Karamoja. ³ Covers 21 districts and valid through October 2024. Regional totals for highly food insecure populations in need of assistance follow the hierarchy of data used by the Global Report on Food Crises: 1) IPC analyses when available, 2) IPC-compatible analyses when available, and 3) other data sources (e.g., HRP figures, WFP's CARL, etc.). More specifically, current regional totals include IPC figures for countries where IPC analyses are available and HRP 2024 figures for Ethiopia.

As of the end of March 2025, nearly 10 million people across Kenya, South Sudan, Tanzania, and Uganda are experiencing Crisis (IPC Phase 3) or worse outcomes, according to the March 2025 report from the East and Central Africa Food Security and Nutrition Working Group (FSNNG). This implies there was no change in this number from February 2025. South Sudan continues to have the highest number of people affected, with 61% experiencing IPC Phase 3 or worse, including 31,000 people facing Catastrophic (IPC Phase 5) conditions.

Source: East Africa Food Security and Nutrition Working Group Report for March 2025

Prevalence of Insufficient Food Consumption

As of March 31, 2025, the number of people facing food insecurity in five selected East African countries remains at 45.3 million, unchanged from the previous two months (Table 3). This figure represents a worsening situation compared to March 2024, when 32.9 million people were affected, but an improvement from March 2023, when the number was 54.5 million. Over the past year, all selected East African countries, except Kenya and Tanzania, have seen a deterioration in food security. Rwanda, South Sudan, and Uganda have been the most significant contributors to this deterioration, with increases of 38.4%, 53.1%, and 116.8%, respectively.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (February 2025)⁶

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Kenya	51.40	13.60	13.60	26.46	0.00	0.00	-47.69
Rwanda	12.30	3.60	3.60	29.27	0.00	38.46	-71.43
South Sudan	11.00	4.90	4.90	44.55	0.00	53.13	63.33
Tanzania	56.30	5.20	5.20	9.24	0.00	0.00	-23.53
Uganda	42.70	18.00	18.00	42.15	0.00	116.87	195.08

*Current month and **Previous month


● = No change; ↗ = Low increase (0-10%); ↕ = Moderate increase (10-30%); ↑ = High increase (>30%)

↘ = Low decrease (0-10%); ↙ = Moderate decrease (10-30%); ↓ = High decrease (>30%)

⁶ Author's construction based on WFP HungerMap Live

Commodity Prices

Key drivers of commodity prices in EA

	Conflicts	Conflicts and insecurity persist particularly in South Sudan and Ethiopia preventing price recovery from high levels despite harvests.
	Seasonal Dynamics	The October-December season, including Tanzania's main season, harvests in the region are improving supplies in most markets, resulting in lower prices across the region. Above average rains in some parts of the region may have affected the easy movement of crops impacting prices.
	Macroeconomic Shocks	South Sudan continues to experience high prices due to poor macroeconomic conditions, an influx of returning refugees from Sudan, trade disruptions, and localised poor harvests.

Maize

Figure 5: National average price spreads for maize across select East African Countries⁷

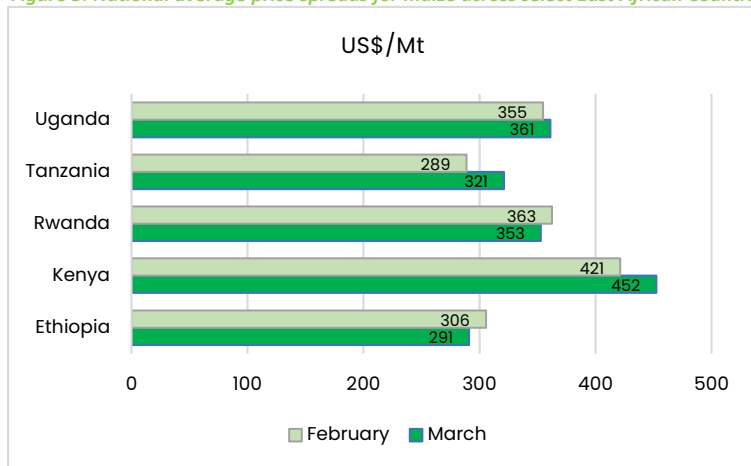


Figure 5 illustrates the price spread for maize (in USD) across five East African countries. Ethiopia has the lowest price in the region at USD 291/MT, reflecting a 5% month-on-month decrease. Kenya and Tanzania have seen price increases of 7% and 11%, reaching USD 452/MT and USD 321/MT respectively, with Kenya having the highest maize price in the region. Uganda and Rwanda have experienced relatively stable month-on-month price changes, with variations of +/- 2%, recording prices of USD 361/MT and USD 353/MT respectively.

The decrease in Rwanda's prices is attributed to increased supplies during the principal Season A maize harvest period.

Local currency price changes (Table 4) further confirm this trend. In Rwanda, prices have decreased by 2.10% and 14.68% compared to the past one and three months, respectively. Ethiopia has also seen a steady price decline across all periods, with current prices being 7.56% and 4.52% lower compared to

the past 6 and 12 months, reflecting increased stocks due to good main season harvests. Conversely, prices in Kenya, Tanzania, Uganda, and South Sudan are significantly higher compared to the past 6 and 12 months. Notably, South Sudan has experienced a significant increase in maize prices, ranging from 73.61% to 319.01% over the past 1-12 months. This alarming rise is primarily due to the depreciation of the national currency, driven by a substantial reduction in oil exports caused by damage to pipelines passing through Sudan and disruptions in oil shipments via the Red Sea. These issues are set against a backdrop of severe macroeconomic challenges and depletion of maize stocks due to increased demand in Uganda, Kenya, and Tanzania. In Uganda, maize prices have risen by 18.13% to 24.58%, while in Kenya, the price increase ranges from 16.65% to 22.62%, and in Tanzania, prices have increased by 21.43% to 41.67%.

Table 4: Percentage changes in maize prices in East Africa⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	3,773.06	-2.81 ↘	-3.96 ↘	-7.56 ↓	-4.52 ↘
Kenya	Maize	National Average, Retail, KES/KG	58.10	7.31 ↑	12.57 ↑	16.65 ⊗	22.62 ⊗
Rwanda	Maize	National Average, Retail, RWF/Kg	495.59	-2.10 ↘	-14.68 ↓	19.89 ⊗	62.75 ⊗
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	3,939.65	101.09 ⊗	106.95 ⊗	73.61 ⊗	319.01 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	85,000.00	13.33 ↑	15.91 ⊗	41.67 ⊗	21.43 ⊗
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,333.83	-0.12 ↘	1.68 ▲	-11.97 ↓	-6.63 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,314.09	1.24 ▲	1.59 ▲	24.58 ⊗	18.13 ⊗

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
 ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ▼ = high decrease (>15%)

⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁸ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Rice

Figure 6: National average price spreads for rice across select East African Countries⁹

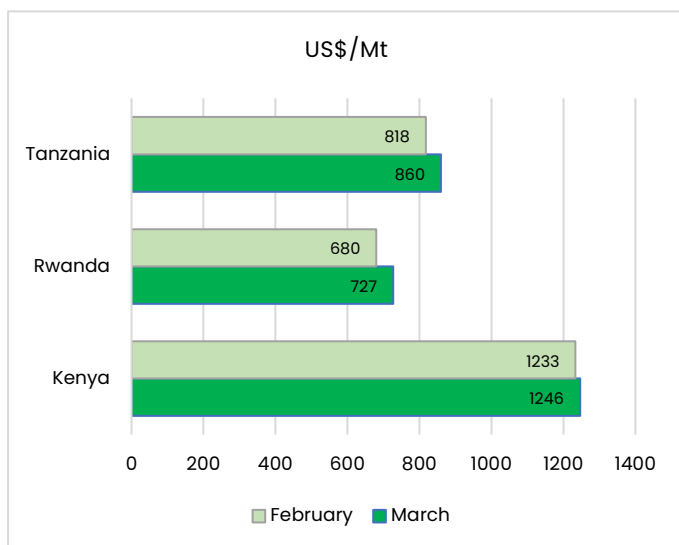


Figure 6 illustrates the rice price spread (in USD) among Tanzania, Rwanda, and Kenya, with three countries experiencing monthly price increases.

Rwanda has the highest percentage increase, followed by Tanzania and Kenya. Kenya has the highest rice price at USD 1,246/MT, followed by Tanzania at USD 860/MT, while Rwanda has the lowest at USD 727/MT. Kenya experienced a modest month-on-month price increase of 1%, despite its recent agreement to lower the customs valuation of Pakistani rice from USD 615 to USD 460 per metric ton, significantly boosting Pakistan's export competitiveness in the region. Rwanda and Tanzania's price increases of 6.91% and 5.13% month-on-month, respectively, are attributed to increased demand and stock depletion from the previous month.

Local currency price trends (Table 5) indicate that Tanzania's prices have increased by 7.06%, 13.75%, and 22.97% over the past one, three, and six months, respectively. In Kenya, prices are 3.39% and 19.72% higher than they were in the past 6 and 12 months, respectively. Similarly, Rwanda has seen a moderate uptick in its rice prices, which are 11.15%

and 5.91% higher compared to the past 6 and 12 months, respectively.

Table 5: Percentage changes in rice prices in East Africa¹⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	160.04	0.98 ▲	-2.08 ▼	3.39 ▲	19.72 ✖
Rwanda	Rice	National Average, Retail, RWF/Kg	863.80	1.37 ▲	-3.34 ▼	11.15 ▲	5.91 ▲
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	227,500.00	7.06 ▲	13.75 ▲	22.97 ✖	-1.09 ▼

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ✖ = high increase (>15%), ▼ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

Beans

Figure 7: National average price spreads for beans across select East African Countries¹¹

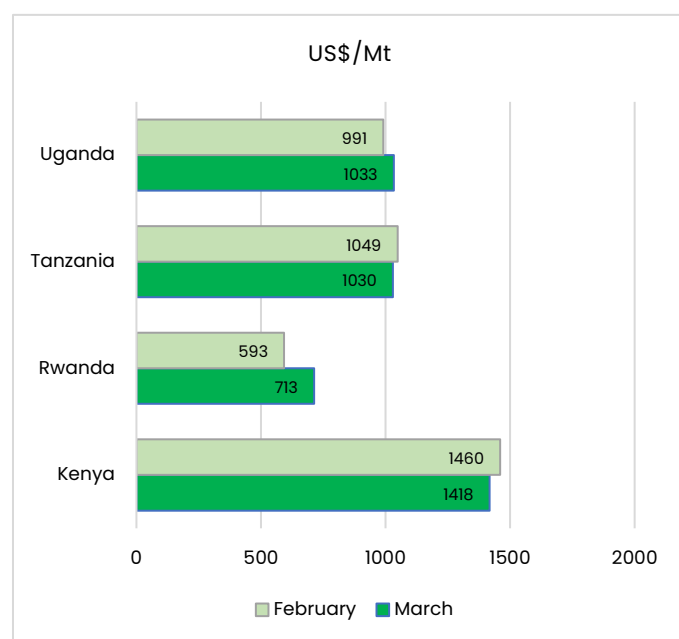


Figure 7 illustrates the price trends of beans in USD across four selected East African countries. Due to favourable green harvests and effective stock maintenance earlier in the year, prices in Tanzania and Kenya have remained stable or slightly fell, with prices at USD 1,030/MT and USD 1,418/MT respectively. This reflects a month-on-month decrease of 1.8% in Tanzania and 2.9% in Kenya, although Kenya still has the highest price in the region. In contrast, Rwanda and Uganda have experienced price increases of 20% and 4.3% respectively, reaching USD 713/MT and USD 1033/MT respectively, driven by increased export demand from East and Southern African countries. Despite this, Rwanda maintains the lowest price in the region, followed by Tanzania and Uganda.

In local currencies, as shown in Table 6, the prices of beans in Rwanda remain higher overall by 20.97%, 15.14%, and 88.28% compared to the past 1, 6, and 12 months respectively, due to rising demand from countries in the East and Southern Africa regions. The prices of Kenya's red haricot beans and Uganda's beans also show low (0-5%) to moderate (5-15%) increases. Conversely, Kenya's yellow-green beans have seen a consistent decline over the past 1-6 months, but higher than the 12-month level by 5.9%. Similarly, bean prices in Tanzania have remained stable or lower compared to the past 1-3 months but higher by 4.81% and 18.48% compared to the past 6 and 12 months.

⁹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁰ Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania

¹¹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 6: Percentage changes in beans prices in East Africa¹²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	182.13	-2.93 ↓	-2.15 ↓	-3.91 ↓	5.90 ↑
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	144.91	2.85 ▲	2.75 ▲	1.77 ▲	12.62 ↑
Rwanda	Beans	National Average, Retail, RWF/Kg	1,001.01	20.97 ⊗	-0.81 ↓	15.14 ⊗	88.28 ⊗
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	272,500.00	0.00 ●	-3.82 ↓	4.81 ▲	18.48 ⊗
Uganda	Beans	National Average, Retail, UGX/Kg*	3,758.89	3.69 ▲	3.87 ▲	5.34 ↑	2.10 ▲

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
 ↓ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Wheat

Figure 8: National average price spreads for wheat across select East African Countries

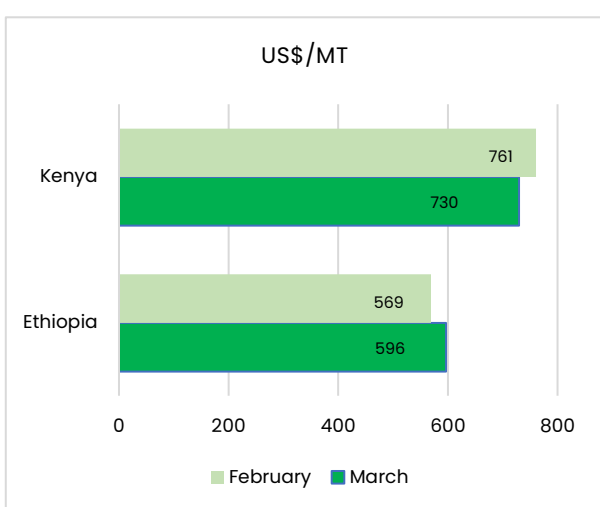


Figure 8 illustrates wheat prices in USD for two selected East African countries, Kenya and Ethiopia, with the former recording a price decrease of 4% at USD 730/Mt while the latter recorded a price increase of 5% to USD 596/Mt. Kenya's price decline is attributed to anticipated large harvests and increased market supply with the total available wheat in the hands of farmers and Marketing Agents estimated at 321,596 bags, the bulk being in Upper Narok with 130,828 bags. The remaining wheat to be harvested in Upper Narok and *Timau* is projected to be 80,000 bags. Conversely, rising demand and stock depletion in Ethiopia continue to drive upward pressure on price trends compared to the previous month.

Similar trends are observed for the local currency prices (Table 7), where Kenya's wheat prices are lower by 4.19%, 2.73% and 3.44% compared to the past 1, 3 and 6 months. However, the current price is significantly higher by 32.99% compared to March 2024 due to inflationary pressures.¹³ On the other hand, Ethiopia's wheat price remains high against all periods, ranging from 6% to 9.96%, mainly due to increasing local and export demands.

Table 7: Percentage changes in wheat prices in East Africa¹⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	7,730.37	6.99 ↑	11.55 ↑	6.45 ↑	9.96 ↑
Kenya	Wheat	National Average, Retail, KES/KG	93.70	-4.19 ↓	-2.73 ↓	-3.44 ↓	32.99 ⊗

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
 ↓ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Fertiliser

Overall, the prices of all monitored fertilisers in Kenya and Rwanda remain higher than those recorded 1-3 months ago due to high in-season demands (Table 8). For example, in Kenya, the prices of CAN, DAP, and NPK fertilisers went up by 15.41%, 14.52%, and 10.2%, respectively. In Rwanda, the price of urea rose by 7.54% compared to the past month. Conversely, the current prices of all monitored fertilisers are significantly lower than their levels from the past year. In Kenya, the prices of CAN and DAP dropped by 65.57% and 37.76%, respectively, while in Rwanda, the price of urea decreased by 10.89%.

¹² Author's construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

¹³ ReliefWeb <https://reliefweb.int/report/world/food-security-monitor-january-2025>

¹⁴ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Table 8: Percentage changes in fertiliser prices in East Africa¹⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	93.73	15.41	3.06	-22.39	-65.57
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	124.66	14.52	2.04	-1.75	-37.76
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	105.26	10.20	30.01	-1.70	-5.40
Rwanda	Urea	National Average USD/50KG*	1,021.07	7.54	7.48	5.83	-10.89

Note: Last price is for March 2025, * February 2025, and ** January 2025

= no change; = low increase (0-5%), = moderate increase (5-15%), = high increase (>15%),
 = low decrease (0-5%), = moderate decrease (5-15%), = high decrease (>15%)

Seasonal Monitor and Cropping Conditions

In East Africa, the unfavourable start to the seasonal rains raises concerns about the *Belg* and main season cereal harvests. In Ethiopia, the planting of *Belg* season maize is ongoing, but early season rainfall deficits are causing concerns in most areas. However, the southwest and north-central regions experienced improved rainfall in March. Additionally, clashes in the eastern *Belg*-producing areas of Amhara and Oromia are causing localised disruptions to cropping activities.

In Tanzania, the planting and development of Masika season cereals are underway, along with the initiation of *Vuli* season sorghum planting. Overall, conditions are favourable, except along the northern coast where March rainfall was below average. In other unimodal regions, *Msimu* season cereals continue to develop under favourable conditions, with near to above-normal rainfall anticipated through June.

In Kenya, the harvesting of short rains maize in the Eastern and Coastal areas has concluded under poor conditions, primarily due to inadequate rainfall during the October to December 2024 season, exacerbated by high temperatures. Conversely, in the central region, the harvesting of short rains maize has concluded under favourable conditions. Currently, the planting of long rains maize has just begun across the country. However, there are concerns due to the below-average rainfall received, despite minor improvements during the second half of March.

In Uganda, the planting of first season maize continues in bimodal areas, with concerns in most regions due to a poor start to the seasonal rains. However, precipitation improved in the eastern areas during March. As of late March, most regions are experiencing rainfall deficits that may impact crop establishment. Nonetheless, the forecast of near to above-average precipitation through early April could facilitate recovery and enhance vegetation conditions.

Meanwhile, in both Rwanda and Burundi, the planting of Season B cereals is underway, with concerns due to prior dry conditions and recent below-average rainfall in March. However, current rains are picking and expected to be near to above normal through June.

¹⁵ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

Southern Africa Food Security Update

Prevalence of Insufficient Food Consumption

As of March 31, 2025, the number of people facing insufficient food consumption situation in four selected Southern African countries remains steady at 22.2 million, unchanged from the previous two months (see Table 9). This figure represents an improvement compared to March 2024, when 23.2 million people were affected, and March 2023, when the number was 34.7 million. The overall decline over the past two years is largely due to significant reductions in Malawi (56.9%) and Zambia (64.8%), despite increases in Mozambique (18.7%) and Zimbabwe (45.1%).

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (February 2025)¹⁶

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Malawi	18.10	6.80	6.80	37.57	0.00	0.00	-56.96
Mozambique	29.50	7.60	7.60	25.76	0.00	0.00	18.75
Zambia	17.40	3.30	3.30	18.97	0.00	0.00	-64.89
Zimbabwe	15.20	4.50	4.50	29.61	0.00	-18.18	45.16

*Current month and **Previous month

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ▲ = high increase (>15%), ▼ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

Commodity Prices

Key drivers of prices in the Southern Africa region




	Seasonality Patterns	Most Southern African countries are experiencing seasonal declines in grain prices as the harvest season kicks in despite the expected below-average harvests.
	Weather Shocks	The aftermath of the cyclone, drought shocks and heavy flooding early in the planting season led to below-average harvests from the previous season, resulting in higher food prices.
	Macroeconomic Shocks	Poor macroeconomic conditions caused by forex shortages, high food inflation and high debt repayments sustain higher food prices.

Figure 9: National average price spreads for maize across select Southern African Countries¹⁷

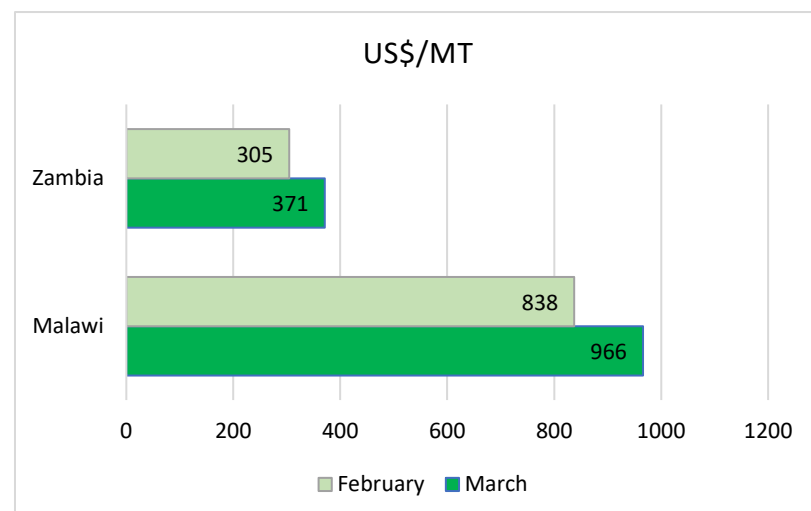


Figure 9 depicts the maize prices in USD for Zambia and Malawi, with both countries experiencing monthly price spikes. In Zambia, the price of maize has increased by 22% month-on-month reaching USD 371/MT. This is attributed to stock depletion from the cereal imports, coupled with an increase in electricity tariffs in response to power shortages.

Similarly, Malawi has seen a 15% increase maize prices, now at USD 966 per metric ton. According to FAO this is due to constrained domestic and regional supply across Southern Africa. Additionally, a weak currency has driven up processing and distribution costs due to higher prices of key imported inputs like fuel. Conversely, despite mid-season enhanced rains in the region, water levels at the Kariba Dam in Zambia remain critically low, with only marginal improvements. This situation continues to disrupt power supply and irrigation availability in Zambia.

¹⁶ Author's construction based on HungerMap

¹⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

As shown in **Table 10**, the local currency price of maize remains overall elevated against the past 1-12 months. Compared to February 2025, the national average price of maize in March 2025 recorded an uptick of 5.69% and 22.26% in Malawi and Zambia respectively. Compared to a year ago, the national average price of maize in Malawi had risen by 116.59%, while that of Zambia went up by 13.51%. These surges in the local currency prices highlight the severe economic challenges these countries continue to face underpinned by droughts and currency depreciations despite the ongoing harvests. The effectiveness of the response measures by both countries influenced the degree of impact on prices. For example, Zambia proactively imported grains from neighbouring Tanzania, which helped mitigate the impact of the drought-induced shortages on prices.

Table 10: Percentage changes in select commodity prices in Southern Africa¹⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	Liwonde, MWK/Kg	1,724.94	1.18 ▲	65.63 ❌	105.28 ❌	112.69 ❌
Malawi	Maize	Mzimba, MWK/Kg	1,477.41	10.69 ↑	64.14 ❌	90.12 ❌	118.88 ❌
Malawi	Maize	Mzuzu, MWK/Kg	1,541.02	15.96 ❌	97.66 ❌	136.13 ❌	132.43 ❌
Malawi	Maize	National Average, MWK/Kg	1,663.40	5.69 ↑	73.04 ❌	109.22 ❌	116.59 ❌
Malawi	Maize	Nsanje, MWK/Kg	1,754.45	1.02 ▲	67.46 ❌	100.43 ❌	100.74 ❌
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	10.56	22.26 ❌	13.93 ↑	25.54 ❌	13.51 ↑

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ❌ = high increase (>15%),
 ▼ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Seasonal Monitor and Cropping Conditions

In **Southern Africa**, the harvesting of main season cereals is currently underway across all regions, including Zambia and Malawi. According to the latest Regional Food Balance Sheet Crop Yield Forecast report, the broader Southern Africa region has been experiencing irregular rainfall patterns, resulting in mixed crop conditions. Flash flooding from late February to late March impacted parts of northeastern Zambia, contributing to the proliferation of pests such as African Armyworm, Fall Armyworm, and locusts. Both Zambia and Malawi have predominantly faced extensive dry spells across most parts of these countries, with northern Zambia particularly affected during the long rainy season. Conversely, other parts of Malawi have received heavy rains, causing potential agricultural damage, with the impacts from Cyclone Jude anticipated to negatively affect yields in the south. Maize in Malawi continues to develop under generally favourable conditions, while some areas in Zambia are experiencing very poor crop conditions, with only a few areas showing improvement. However, the mid-season enhanced rains are expected to significantly improve overall crop production prospects compared to the previous year, and 2025 cereal production is expected to be near average.

¹⁸ Author's construction based on FAO data

West Africa Food Security Update

Prevalence of Insufficient Food Consumption

As of March 31, 2025, the number of people facing insufficient food consumption in seven selected West African countries decreased from 157.3 million in February to 156.6 million in March, driven by a reduction of 700,000 people in Nigeria (see Table 11). This current level is lower than the 158.5 million reported in March 2024 but higher than the 123.6 million in March 2023. Over the past year, Ghana and Togo have seen increases of 58.4% and 42.1% respectively in the number of people facing food insecurity, while Nigeria has experienced a 5.7% decrease.

According to the Economic Community of West African States (ECOWAS), approximately 34.7 million people in the region are currently experiencing a food crisis and require immediate food and nutrition assistance.¹⁹ This number is expected to rise to 47 million by the lean season from June to August 2025. The commission also highlighted that the nutritional crisis remains severe in several areas, with global acute malnutrition rates ranging from 10% to 14%. Various challenges, including geopolitical shifts, ongoing conflicts, economic instability, climate change, and chronic food insecurity exacerbate this dire situation. To address these issues, there is a need to strengthen the region's response mechanisms, such as the Regional Food Security Reserve, and to build a foundation for sustainable resilience.

Table 11: Prevalence of Insufficient Food Consumption in selected West African countries (March 2025)²⁰




Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)	
Burkina Faso	19.80	11.20	11.20	56.57	0.00	●	0.00 ●	187.18 ↑
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00	●	0.00 ●	-59.20 ↓
Ghana	29.80	8.40	8.40	28.19	0.00	●	58.49 ↑	110.00 ↑
Mali	19.10	13.20	13.20	69.11	0.00	●	0.00 ●	46.67 ↑
Niger	25.90	21.40	21.40	82.63	0.00	●	0.00 ●	52.86 ↑
Nigeria	202.80	94.60	95.30	46.65	-0.73	▾	-5.78 ▾	459.76 ↑
Togo	7.90	2.70	2.70	34.18	0.00	●	42.11 ↑	-95.73 ↓

*Current month and **Previous month

● = no change; ▴ = low increase (0-5%), ↑ = moderate increase (5-15%), ↑↑ = high increase (>15%),
 ▾ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓↓ = high decrease (>15%)

Commodity Prices

Key drivers of the price movements in West Africa include

	Insecurity & Armed Conflicts	Conflict, insecurity and political tension in West Africa continue to disrupt agriculture, trade, and food assistance activities, resulting in higher food prices.
	Macroeconomic Challenges	Poor macroeconomic conditions, driven by high inflation rates, local currency depreciations and elevated fuel prices are pushing food prices upwards in some West African countries.
	Seasonal Dynamics	Seasonal changes in food supply, including the early onset of the lean season in most countries in West Africa, are putting upward pressure on food prices.

¹⁹ <https://www.arise.tv/about-47-million-people-at-risk-of-food-crisis-by-mid-2025-ecowas-warns/>; [ECOWAS urges swift action as West Africa faces escalating food crisis | Business Insider Africa](#)

²⁰ Author's construction based on WFP HungerMap Live

Maize

Figure 10: Price spreads for maize across select West African Countries²¹

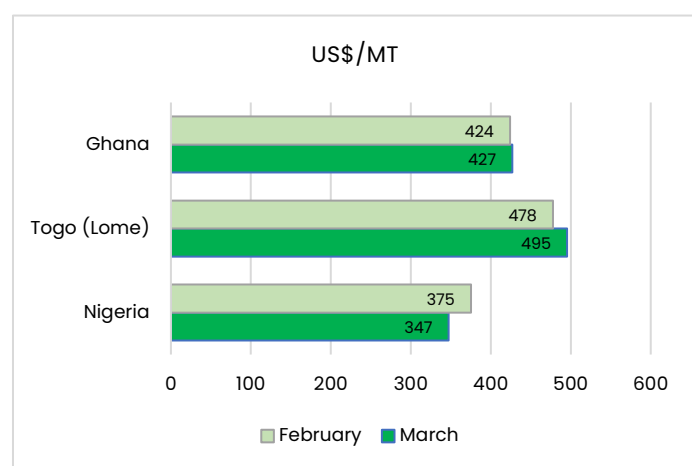


Figure 10 illustrates the price spread of maize in USD across three West African countries: Ghana, Togo, and Nigeria. Nigeria recorded the lowest maize price at USD 347/MT, down from USD 375/MT. Conversely, Togo has the highest maize price at USD 495/MT, up from USD 478/MT. The decline in maize prices in Nigeria in USD is also reflective of the trends seen in local currencies, with prices falling by 5.16% and 9.72% over the past 1 and 3 months, respectively (see Table 12). Similarly, maize prices in local currency in select markets in Togo have remained stable or declined over the past one and six months. However, the current price level in Togo remains higher than it was 12 months ago by up to 16%. The high prices of cereals are attributed to several factors, including weak national currency, high transport costs, cereal production shortfalls, and conflict-related market disruptions in several areas. The onset of Ramadan compelled farmers to sell their recently harvested crops to purchase essential items, contributing to a decrease in prices in Nigeria.

Table 12: Percentage changes in maize prices in West Africa²²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	6,596.30	0.55 ▲	4.03 ▲		
Nigeria	Maize (white)	National Average, NGN/KG	533.13	-5.16 ▼	-9.72 ▼		
Togo	Maize (white)	Amegnran, XOF/Kg*	290.00	0.00 ●	0.00 ●	3.57 ▲	16.00 ✖
Togo	Maize (white)	Anie, XOF/Kg*	265.00	0.00 ●	0.00 ●	-1.85 ▾	6.00 ▲
Togo	Maize (white)	Cinkassé, XOF/Kg*	265.00	0.00 ●	0.00 ●	-1.85 ▾	6.00 ▲
Togo	Maize (white)	Kara, XOF/Kg*	285.00	0.00 ●	1.79 ▲	-1.72 ▾	11.76 ▲
Togo	Maize (white)	Kor bongou, XOF/Kg*	260.00	0.00 ●	0.00 ●	-3.70 ▾	6.12 ▲
Togo	Maize (white)	Lomé, XOF/Kg*	300.00	0.00 ●	0.00 ●	0.00 ●	11.52 ▲

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ✖ = high increase (>15%),
 ▾ = low decrease (0-5%), ▼ = moderate decrease (5-15%), ▼ = high decrease (>15%)

Rice

Figure 11: Price spreads for rice across select West African Countries²³

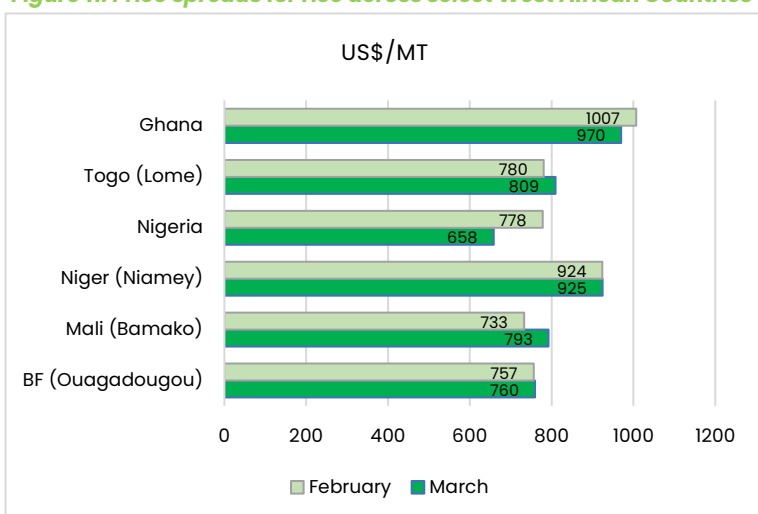


Figure 11 shows the price spread of rice in USD across seven West African markets. Despite an effective export ban on cereals in place, Ghana still has the highest rice price at USD 970/MT, down from USD 1,007/MT, in the region. Nigeria recorded the lowest price at USD 658/MT, down from USD 778/MT month-on-month. Overall, rice prices in local currencies have remained stable or declined across most selected markets in West Africa over the past one to six months, except in Burkina Faso (see Table 13). In Burkina Faso, rice prices have remained stable over the past month but are generally higher than those recorded in the past 6-12 months. The onset of Ramadhan fasting contributed to the dropping of prices in the region as farmers, including cereal hoarders, continue selling their commodities to meet their cash demands. In Nigeria, the Government's issuance of a tariff moratorium on wheat, corn, rice, and other food crops last year, has continued influencing the price fall in the country²⁴.

²¹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²² Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Togo

²³ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

²⁴ Nigeria Imports 32000 MT of Rice <https://msmeafricaonline.com/nigeria-imports-32000-tons-of-thai-rice-amid-food-inflation-crisis/>

Table 13: Percentage changes in rice prices in West Africa²⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg	40,000.00	-5.88 ↓	-4.76 ↘	-4.76 ↘	-4.76 ↘
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	50,000.00	-9.09 ↓	-9.09 ↓	-9.09 ↓	17.65 ⊗
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	56,000.00	1.82 ▲	0.00 ●	3.70 ▲	3.70 ▲
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	50,000.00	0.00 ●	0.00 ●	19.05 ⊗	19.05 ⊗
Burkina Faso	Rice (imported)	Kongoussi, Wholesale, XOF/100 kg	60,000.00	9.09 ↑	9.09 ↑	20.00 ⊗	20.00 ⊗
Burkina Faso	Rice (imported)	Nouna, Wholesale, XOF/100 kg	55,000.00	0.00 ●	-8.33 ↓	37.50 ⊗	25.00 ⊗
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	46,000.00	-3.16 ↘	-5.15 ↓	-8.00 ↓	-2.13 ↘
Burkina Faso	Rice (imported)	Tenkodogo, Wholesale, XOF/100 kg	47,500.00	5.56 ↑	11.76 ↑	-9.52 ↓	5.56 ↑
Ghana	Rice	National Average, (GHS/MT)	15,571.43	-7.17 ↓	-4.80 ↘		
Mali	Rice	Bamako, Wholesale, XOF/100 KG	48,000.00	4.35 ▲	4.35 ▲	-4.00 ↘	6.67 ↑
Mali	Rice	Kayes, Wholesale, XOF/100 KG	54,000.00	0.00 ●	0.00 ●	24.14 ⊗	3.85 ▲
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	47,500.00	5.56 ↑	5.56 ↑	-7.77 ↓	3.26 ▲
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG	48,000.00	0.00 ●	6.67 ↑	2.13 ▲	37.14 ⊗
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	48,000.00	9.09 ↑	9.09 ↑	-7.69 ↓	11.63 ↑
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	38,500.00	-2.53 ↘	-3.75 ↘	-28.70 ↓	-13.48 ↓
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	52,000.00	8.33 ↑	8.33 ↑	-0.95 ↘	13.04 ↑
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	660.00	1.54 ▲	3.13 ▲	3.13 ▲	0.00 ●
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	600.00	0.00 ●	-6.25 ↓	-9.09 ↓	-6.25 ↓
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	520.00	-10.34 ↓	-16.13 ↓	-18.75 ↓	-13.33 ↓
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	560.00	-3.45 ↘	-6.04 ↓	-12.50 ↓	-12.50 ↓
Niger	Rice (imported)	Tillabéri, Wholesale, XOF/Kg	580.00	-3.33 ↘	-3.33 ↘	-9.38 ↓	-12.12 ↓
Niger	Rice (imported)	Zinder, Wholesale, XOF/Kg	580.00	-3.33 ↘	-3.33 ↘	-6.45 ↓	-9.38 ↓
Nigeria	Rice (milled)	National Average, NGN/KG	1,165.33	-4.07 ↘	-12.88 ↓		
Togo	Rice (imported)	Amegnran, XOF/Kg*	500.00	0.00 ●	0.00 ●	0.00 ●	4.17 ▲
Togo	Rice (imported)	Anié, XOF/Kg*	500.00	0.00 ●	0.00 ●	0.00 ●	6.38 ↑
Togo	Rice (imported)	Cinkassé, XOF/Kg*	480.00	0.00 ●	0.00 ●	0.00 ●	2.13 ▲
Togo	Rice (imported)	Kara, XOF/Kg*	490.00	0.00 ●	0.00 ●	0.00 ●	4.26 ▲
Togo	Rice (imported)	Kor bongou, XOF/Kg*	500.00	0.00 ●	0.00 ●	0.00 ●	3.09 ▲
Togo	Rice (imported)	Lomé, XOF/Kg*	490.00	0.00 ●	0.00 ●	0.00 ●	2.08 ▲

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ⊗ = high increase (>15%),
 ↘ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Millet

Figure 12: Price spreads for millet across select West African Countries²⁶

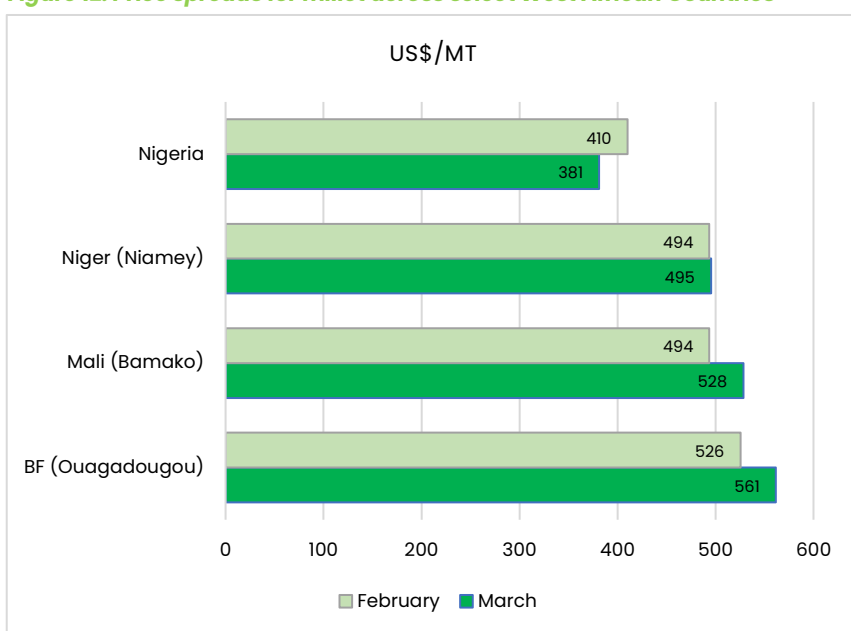


Figure 12 illustrates millet prices in USD across selected West African countries. In March, millet prices were highest in Ouagadougou, Burkina Faso, and lowest in Nigeria. As a result of the poor 2024 season harvest, the price of millet in Burkina Faso continued to increase from USD 526/MT to USD 561/MT. Meanwhile, Nigeria saw a decrease of USD 29/MT from February 2025 attributed to an increase in supply from imports due to the Government's issuance of a [tariff moratorium](#) on the crop. In local currencies (see Table 14), mixed trends are observed: Nigeria experienced declines of 6.42% and 16.23% over the past one and two months, respectively, while prices in Burkina Faso remained largely stable or saw moderate increases. In Mali and Niger, prices were significantly higher than the previous month. Overall, millet prices are lower than they were three to six months ago but remain higher than their levels from a year ago.

²⁵ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

²⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 14: Percentage changes in millet prices in select West African Countries²⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	38,000.00	2.70 ▲	5.56 ↑	0.00 ●	16.92 ☒
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	32,500.00	8.33 ↑	-7.14 ↓	-18.75 ↓	18.18 ☒
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	41,000.00	2.50 ▲	-6.82 ↓	-13.68 ↓	22.39 ☒
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	33,000.00	-1.49 ▾	3.13 ▲	-1.49 ▾	26.92 ☒
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00 ●	0.00 ●	0.00 ●	60.38 ☒
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	35,000.00	0.00 ●	0.00 ●	-1.41 ▾	48.94 ☒
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	34,000.00	3.03 ▲	0.00 ●	-10.53 ↓	28.30 ☒
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	40,000.00	9.59 ↑	6.67 ↑	-11.11 ↓	33.33 ☒
Mali	Millet	Bamako, Wholesale, XOF/100 KG	32,000.00	3.23 ▲	-3.03 ▾	-11.11 ↓	30.61 ☒
Mali	Millet	Kayes, Wholesale, XOF/100 KG	35,000.00	-2.78 ▾	-7.89 ↓	-12.50 ↓	29.63 ☒
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	32,500.00	8.33 ↑	8.33 ↑	-16.67 ↓	30.00 ☒
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	38,000.00	5.56 ↑	8.57 ↑	-5.00 ↓	16.92 ☒
Niger	Millet	Agadez, Wholesale, XOF/Kg	400.00	0.00 ●	33.33 ☒	-20.00 ↓	37.93 ☒
Niger	Millet	Dosso, Wholesale, XOF/Kg	285.00	3.64 ▲	14.00 ↑	-35.23 ↓	3.64 ▲
Niger	Millet	Maradi, Wholesale, XOF/Kg	275.00	0.00 ●	3.77 ▲	-36.78 ↓	1.85 ▲
Niger	Millet	Niamey, Wholesale, XOF/Kg	300.00	-3.23 ▾	1.69 ▲	-30.23 ↓	0.00 ●
Niger	Millet	Tillabéri, Wholesale, XOF/Kg	300.00	0.00 ●	0.00 ●	-34.07 ↓	-7.69 ↓
Niger	Millet	Zinder, Wholesale, XOF/Kg	330.00	0.00 ●	10.00 ↑	-21.43 ↓	10.00 ↑
Nigeria	Millet	National Average, NGN/KG	614.70	-6.42 ↓	-16.23 ↓		

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▾ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Sorghum

Figure 13: Price spreads for sorghum across select West African Countries²⁸

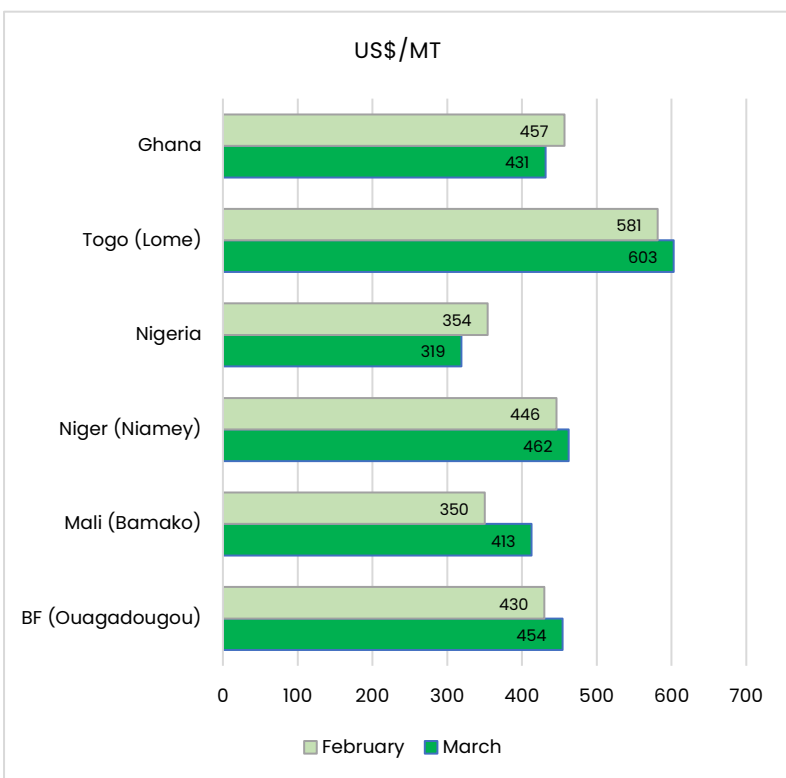


Figure 13 illustrates the price spread among major markets in select West African countries for Sorghum. The data indicates that the highest price of sorghum is in Lomé, Togo, at USD 603/MT, while the lowest price is in Nigeria at USD 319/MT. Table 15 highlights changes in local currency prices, showing mixed trends. Compared to the past 3 to 6 months, sorghum prices are mostly lower or stable in most of the selected markets. In contrast, Tenkodogo, Burkina Faso registered particularly higher prices by 33.33%, 47.37%, and 27.27% compared to the past 1, 3 and 12 months.

Compared to the previous month, sorghum prices have increased in Dedougous and Ouagadougou in Burkina Faso as well as in Bamako and Sikasso (Mali) and in Dosso (Niger). Prices have remained stable or decreased in the rest of the markets in these countries. Over the past three months, sorghum prices in Ghana and Nigeria have declined by 18.15% and 31.10% respectively, while prices in Togo have remained stable compared to the previous month. Overall, sorghum prices remain well above their levels from a year ago in most selected markets in Burkina Faso except Bobo (6% decrease) and Kongoussi (stable). Similarly, prices in most of the selected markets are high except Kayes. These prices are attributed to high transport costs, strong local demand, conflict-related market disruptions and localised production shortfalls of the 2024 cereal harvest²⁹.

²⁷ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

²⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²⁹ FPMA March 2025 <https://www.fao.org/giews/food-prices/regional-roundups/detail/en/c/1733197/>

Table 15: Percentage changes in sorghum prices in select West African countries ³⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	23,500.00	0.00	9.30	-6.00	-6.00
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	25,500.00	2.00	2.00	-15.00	13.33
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	35,000.00	-6.67	2.94	-6.67	22.81
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	26,000.00	-3.70	4.00	-21.21	8.33
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	0.00	0.00	-16.67	0.00
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	25,000.00	0.00	-9.09	-10.71	25.00
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	27,500.00	1.85	25.00	-3.51	7.84
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	28,000.00	33.33	47.37	0.00	27.27
Ghana	Sorghum	National Average, (GHS/MT)	7,066.67	-4.72	-18.15		
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	25,000.00	13.64	8.70	-30.56	8.70
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00	-7.41	-28.57	0.00
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	22,500.00	12.50	-10.00	-18.18	7.14
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	34,000.00	0.00	3.03	-15.00	4.62
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	360.00	0.00	10.77	-23.40	24.14
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	280.00	7.69	12.00	-30.00	-6.67
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	235.00	-2.08	2.17	-38.16	-6.00
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	280.00	0.00	0.00	-40.43	0.00
Niger	Sorghum	Tillabéri, Wholesale, XOF/Kg	300.00	0.00	9.09	-33.33	-3.23
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	240.00	0.00	-12.73	-42.86	-20.00
Nigeria	Sorghum (white)	National Average, NGN/KG	530.30	-6.47	-31.10		
Togo	Sorghum	Anié, XOF/Kg*	320.00	0.00	0.00	-1.54	8.47
Togo	Sorghum	Cinkassé, XOF/Kg*	285.00	0.00	0.00	-8.06	0.00
Togo	Sorghum	Kara, XOF/Kg*	325.00	0.00	-33.67	-1.52	4.84
Togo	Sorghum	Kor bongou, XOF/Kg*	290.00	0.00	0.00	-7.94	0.00
Togo	Sorghum	Lomé, XOF/Kg*	365.00	0.00	0.00	0.00	5.80

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▾ = low decrease (0-5%), ▾ = moderate decrease (5-15%), ▾ = high decrease (>15%)

Fertiliser

Table 16 illustrates the price fluctuations of various monitored fertiliser types in Ghana and Nigeria. Over the past month, fertiliser prices in Ghana have remained stable, while Nigeria experienced slight increases ranging from 1.7-2.19%. Compared to the previous 3-12 months, all fertiliser prices in Ghana have risen, with NPK-23-10-5 showing a significant increase of 15.48%, 16.82%, and 18.98%. In Nigeria, the average prices of NPK and urea have decreased by 5.1% and 9.13%, respectively, compared to the past three months.

Table 16: Percentage changes in fertiliser prices in West Africa ³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Ammonium Sulphate	National Av, GHS/50KG**	288.00	0.00	0.00	-1.37	4.35
Ghana	NPK 15-15-15	National Av, GHS/50KG**	437.50	0.00	0.00	-0.41	4.17
Ghana	NPK 20-10-10	National Av, GHS/50KG**	431.70	0.00	2.18	0.75	8.20
Ghana	NPK 23-10-5	National Av, GHS/50KG**	521.50	0.00	15.48	16.82	18.98
Ghana	NPK 25-10-10	National Av, GHS/50KG**	420.00	0.00	5.00	5.00	10.53
Ghana	Urea	National Av, GHS/50KG**	422.70	0.00	0.28	-2.40	3.88
Nigeria	Fertiliser_NPK	National Average, NGN/50KG	862.14	1.77	-5.10		
Nigeria	Fertiliser_Urea	National Average, NGN/50KG	701.16	2.19	-9.13		

Note: Last price is for March 2025, * February 2025, and ** January 2025

● = no change; ▲ = low increase (0-5%), ▲ = moderate increase (5-15%), ☒ = high increase (>15%),
 ▾ = low decrease (0-5%), ▾ = moderate decrease (5-15%), ▾ = high decrease (>15%)

Seasonal Monitor and Cropping Conditions

In West Africa, land preparation and planting of main season cereals are ramping up along the south, and agro-climatic conditions are favourable as rains received in March are supporting planting and germination. Throughout West Africa, conditions are generally favourable, except in areas impacted by persisting conflict, including central Mali where harvesting of second season rice is nearing completion.

³⁰ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

³¹ Author's construction based on AfricaFertiliser.org

Food Trade Updates

Continental

- The Pan-African Payment and Settlement System (PAPSS), initiated by the African Export-Import Bank (Afreximbank) in partnership with the African Union Commission (AUC) and the African Continental Free Trade Area (AfCFTA) Secretariat, has seen a significant advancement with its official launch by KCB Group in Kenya and Bank of Kigali in Rwanda.³² The Bank of Kigali launched the platform in Kigali on February 26th, followed by KCB in Nairobi on February 27th. These launches mark the first integration of PAPSS by banks in their respective countries, highlighting their dedication to promoting intra-African trade and supporting AfCFTA's initiatives.

East Africa

Figure 14 provides an overview of the events and activities that have taken place across various countries in East Africa in the last month and are affecting the food trade in the region.

Figure 14: East Africa cross-border trade updates March 2025



Kenya

The Kenya Revenue Authority (KRA) has established three trade facilitation centres in Kainuk, Lodwar, and Kakuma to improve cargo transit efficiency and bolster regional trade along the Northern Corridor. These new hubs are designed to streamline trade between Kenya and South Sudan while fostering business growth in Turkana County. Additionally, the initiative aims to alleviate congestion at the Malaba and Busia border posts and significantly reduce transit times for cargo traveling from Mombasa to South Sudan.

Tanzania

The Tanzania Plant Health and Pesticides Authority (TPHPA) has raised phytosanitary certificate fees by 460 %, creating significant challenges for the country's agricultural export sector. Previously, exporters paid Tsh58,347 for phytosanitary certification and inspection of a container consignment. Under the revised fees, the charges rise to Tsh331,320 comprising Tsh201,320 for inspection and Tsh130,000 for certification, applicable to consignments over 1,000 kilograms. The increased fees threaten the competitiveness of local agricultural products compared to its regional peers. For instance, the phytosanitary certificate costs just 200 Rwandan francs (Tsh364.1) in Rwanda, 5,000 Ugandan shillings (Tsh3,348) in Uganda, and Ksh 600(Tsh11,880) in Kenya.

³² [KCB Group and Bank of Kigali launch PAPSS, enabling seamless and affordable cross-border payments across Africa - Pan-African Payment and Settlement System](#)

Southern Africa

Figure 15 below summarises some key activities and events recorded across Southern Africa that impact food trade activities.

Figure 15: Southern Africa Food Trade updates for March 2025



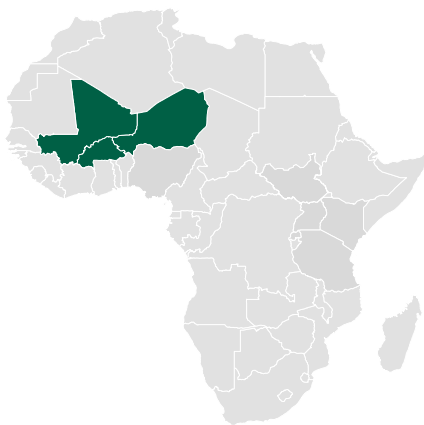
Malawi

The Government of Malawi has prohibited the importation of various commodities including selected vegetables, maize flour, fresh milk, peanut butter, meat products, honey, popcorn, Irish potatoes, garlic, ginger, and onions, among others. This measure, which remains in effect until March 2027, aims to protect local industries, stimulate local production, create jobs and foster the economic empowerment of Malawians.

West Africa

Figure 16 provides an update on the issues and events reported in West African countries, that impact the region's food trade and food security.

Figure 16: West Africa Cross Border Trade Updates March 2025



Mali, Burkina Faso, and Niger

Mali, Burkina Faso, and Niger, all currently under military rule, have introduced a new 0.5% levy on imported goods from Nigeria and other Economic Community of West African States (ECOWAS) member nations. This move aims to finance a newly formed three-state union following their departure from the larger regional economic bloc.



The digital Regional Food Balance Sheet provides near real-time estimates and projections for core staple crop production, stock levels, and other information in East and Southern Africa.

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