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AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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 60th edition provides an overview of the food security situation and market prices across East, South, and West Africa.

The Food Security Monitor is produced with support from the UK Government's Foreign, Commonwealth & Development Office (FCDO) through the Africa Food Trade & Resilience Programme.

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Summary

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

Food Commodity Prices Updates

Food prices across **East Africa** showed a mixed and uneven pattern, influenced by macroeconomic conditions, seasonal harvests, and currency dynamics. **South Sudan** recorded the highest **maize** price at USD 1,043.2/MT following a steep 23% monthly increase driven by currency depreciation and instability, while **Uganda** and **Tanzania** saw moderate rises to USD 500/MT and USD 311/MT, respectively, supported by currency appreciation. **Rwanda's** maize price declined by 3% to USD 399/MT due to increased supply from Season B harvests. In local currency terms, monthly changes were modest, but year-on-year trends revealed significant increases of up to 94.10% in South Sudan, 64.38% in Uganda, 33% in Tanzania, and 19.45% in **Ethiopia**—reflecting tight domestic stocks and strong regional demand. **Kenya**'s maize prices, despite a slight monthly dip to KES 66.88/kg, remain elevated, rising 7.84% over three months and 27.7% year-on-year, indicating ongoing supply challenges.

Rice prices also varied, with Kenya posting the highest at USD 1,265/MT due to strong demand and supply constraints, while Tanzania saw a slight increase and South Sudan and Rwanda experienced declines, though Rwanda's prices remain relatively high. Overall, local currency trends aligned with forex movements, highlighting the impact of seasonal factors, trade dynamics, and economic conditions on staple food prices across the region.

In **Southern Africa**, food prices showed mixed trends driven by harvest outcomes, currency movements, and trade policies. **Malawi** saw a 10% rise in **maize** prices to USD 654/MT, reflecting persistent market tightness despite ongoing imports. Meanwhile, **Zambia** and **Mozambique** recorded sharp declines—41% and 19% respectively—driven by improved harvests and favourable supply conditions. **Zimbabwe** experienced a modest 5% drop to USD 825/MT the highest price in the region, though local price dynamics remain volatile due to inflation and fluctuations in processed maize products.

Rice prices followed a similar pattern, with Zimbabwe and Mozambique recording declines of 0.4% and 13% respectively, driven by improved supply from favourable harvests and imports. In contrast, Malawi experienced a 12% monthly increase to USD 2,395/MT, reflecting tightening supply and macroeconomic pressures. While Mozambique has shown consistent price declines, Zimbabwe's prices remain elevated year-on-year, and Malawi faces a sharp upward trend, underscoring regional disparities in market dynamics. **Bean** markets also showed mixed trends: Zimbabwe and Mozambique recorded price declines of 1% and 13% respectively, driven by favourable harvests and improved supply. In contrast, Malawi saw a 13% price surge due to supply constraints from poor harvests.

In **West Africa**, staple food prices—maize, rice, and millet—have generally softened, though with notable variations across countries and commodities. **Maize** prices declined significantly in **Nigeria**, falling by 20% to USD 285/MT, driven by favourable harvests and increased stock availability. **Ghana** and **Togo (Centrale)** also recorded reductions, with prices dropping to USD 553/MT (-9.7%) and USD 395/MT (-7.6%), respectively, reflecting improved domestic supply and currency appreciation. **Rice** prices, however, presented a mixed picture with slight increases in **Niger** (USD 877/MT, +2%) and Togo Centrale (USD 909/MT, +1%) due to growing demand and currency effects, while Ghana, Nigeria, Mali, and **Burkina Faso** recorded declines ranging from 2% to 9%, reflecting easing market pressures and improved supply conditions. Meanwhile, **millet** prices showed a more consistent downward trend across the region, led by Mali (USD 421/MT, -14.4%), followed by Nigeria, Burkina Faso, and Niger, reflecting improved production and currency stability. Overall, the region is experiencing a general softening in staple food prices, though localised volatility remains.

Food Security Updates

East Africa is facing worsening food security conditions driven by drought, poor harvests, conflict, and economic pressures. South Sudan is experiencing the most severe crisis, with IPC Phase 4 and 5 conditions in Nasir and Ulang, where over 25% of children under five are acutely malnourished. Conflict, cholera outbreaks, and displacement are compounding hunger, while humanitarian aid remains insufficient. Across the region is grappling with deepening vulnerabilities, with critical needs expected to persist through the lean season ending in October.

Southern Africa is experiencing varied food security conditions, with Malawi and Mozambique facing growing challenges, while Zimbabwe shows notable improvement. In Malawi, northern and central regions are experiencing seasonal relief following recent harvests, but southern districts like Blantyre and Thyolo are struggling with food shortages caused by erratic weather and cyclone damage. This has led to early stock depletion and increased market dependence. Mozambique is also facing deteriorating conditions, particularly in the south, where poor rainfall and cyclone impacts have resulted in below-average harvests. Over 609,000 internally displaced persons in Cabo Delgado continue to rely heavily on humanitarian aid, which is expected to decline due to resource constraints. Post-election unrest has further strained urban livelihoods. In contrast, Zimbabwe has experienced a 260% increase in maize production compared to 2024, with falling food prices and improved household purchasing power. While some deficit-producing districts may face rising needs later in the year, overall food security is near normal, supported by a stable currency and strong cash crop income.

West Africa continues to face widespread food insecurity, largely driven by conflict, displacement, and economic instability. In Burkina Faso, restricted access to food and markets caused by armed group activity, especially in the East, Centre-East, and Sahel regions, continues to affect towns such as Djibo and Sebba. Although some areas have seen improvements, food prices remain high, and assistance is irregular. Mali faces fragile conditions as insecurity spreads from the north and centre to the south, causing price hikes of 25–59% above the five-year average. This is limiting food access despite adequate market supplies. Niger is also heavily impacted by conflict, with over 459,000 displaced people and food consumption deficits expected during the July–September lean season. Nigeria is experiencing acute food insecurity, especially in the Northeast, Northwest, and North Central regions, where IPC Phase 3 and 4 conditions persist due to insurgent violence, inflation, and weather shocks. Inaccessible areas like Abadam and Bama face extreme hunger, and humanitarian aid is increasingly constrained.

Food Trade Updates

- The Governments of Malawi and Zambia have signed a groundbreaking Mutual Recognition Agreement (MRA), underpinned by an agreed Mutual Recognition Framework (MRF). This is the first agreement of its kind in Africa, aimed at facilitating trade by eliminating redundant testing requirements between the two countries. By streamlining conformity assessments, the MRA is expected to significantly enhance trade efficiency. This milestone forms part of a broader initiative led by the Common Market for Eastern and Southern Africa (COMESA), in collaboration with AGRA and the UK's Foreign, Commonwealth & Development Office (FCDO). The wider effort also involves Kenya, Rwanda, Uganda, and Zimbabwe.
- Trade restrictions among East African Community (EAC) member states are worsening food insecurity and raising grain prices ahead of the 2025/26 season. Uganda has imposed a USD 10/MT levy on grain by-products like wheat bran and maize bran, impacting regional buyers such as Kenya. South Sudan has introduced costly fees of USD 150 per container and USD 3,000 for electronic permits, along with retesting grain imports, despite existing EAC mutual recognition agreements. These duplicative tests, including aflatoxin checks, violate regional standards and hinder trade.
- The Government of Kenya has approved the duty-free importation of 500,000 metric tonnes of

Grade 1 white rice as part of a short-term response designed to support a broader goal of achieving national food security.

- Kenya sets new wheat prices, import quotas for 2025/26 to encourage local production. Under the revised structure, the minimum price for Grade 1 wheat (78 lbs and above) is approximately KES 4,750 (USD37) per 90 kg bag, while Grade 2 (75–77.9 lbs) will trade at around KES 4,650 (USD36) per bag.
- Kenya and Uganda have signed eight new MoUs to boost trade, infrastructure, and regional integration. Key agreements include cooperation in mineral exploration and institutional capacity building to combat cross-border smuggling, modernising transport and logistics infrastructure to ease the movement of goods and people, harmonising product standards and regulatory frameworks between the respective national bureaus of standards, as well as advancing innovation in agriculture and the animal industry to boost veterinary services and food security.

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 **Figures 1 and 2**) summarises trends in the number of people experiencing Insufficient Food Consumption (IFC)[1], identifies hunger hotspots, and tracks average changes in food prices over the past year. **Figure 1** illustrates the prevalence of IFC in July 2025 across 17 countries in Eastern, Southern, and Western Africa.

Burkina Faso, Mali, and Niger remain the most critical hunger hotspots in the region, with 56.6%, 69.1%, and 82.6% of their populations, respectively, experiencing insufficient food consumption (IFC) over the past 13 months. South Sudan and Uganda also remain significantly affected, with 44.5% and 42.2% of their populations facing IFC. On year-on-year basis, Nigeria and Zimbabwe have experienced declines of 45.9% and 13.4% respectively. However, IFC levels have risen sharply in Ghana (52.7%), Rwanda (38.4%), South Sudan (36.1%), Togo (42.1%), and Uganda (109.3%) compared to a year ago.

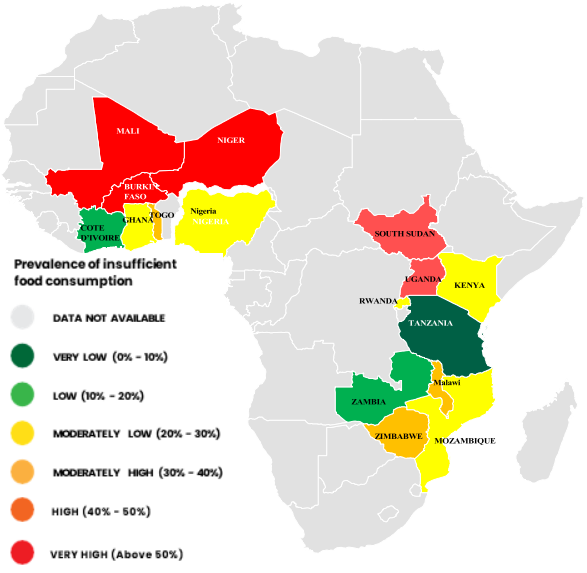
Average maize price trends over the past six months have generally fallen in Ghana (12.2%), Malawi (4.2%), Nigeria (45.9%), Rwanda (12.2%), Togo (4%), Zambia (40.6%), and Zimbabwe (Epworth; 27.5%). Similarly, the average prices of imported rice have declined in Burkina Faso (2.2.%), Mali (0.14%), and Niger (18.3%). On the other hand, surges have been observed in the average prices in Ethiopia, Kenya, South Sudan, Tanzania, and Uganda, compared to the past six months.

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	●	-2.20	↓	6.00	↑
Ethiopia					17.00	↑	4.17	↑
Ghana	0.00	●	52.73	↑	-12.21	↓		
Kenya	0.00	●	0.00	●	21.81	↑	27.71	↑
Malawi	0.00	●	0.00	●	-4.19	↓	42.26	↑
Mali	0.00	●	0.00	●	-0.14	↓	-2.16	↓
Mozambique	0.00	●	0.00	●				
Niger	0.00	●	0.00	●	-18.37	↓	-29.12	↓
Nigeria	0.00	●	-45.98	↓	-33.47	↓		
Rwanda	0.00	●	38.46	↑	-12.20	↓		
South Sudan	0.00	●	36.11	↑	66.26	↑	94.10	↑
Tanzania	0.00	●	0.00	●	20.00	↑	33.33	↑
Togo	0.00	●	42.11	↑	-3.99	↓	-16.27	↓
Uganda	0.00	●	109.30	↑	42.13	↑	64.38	↑
Zambia	0.00	●	0.00	●	-40.67	↓	-35.38	↓
Zimbabwe	0.00	●	-13.46	↓	-27.54	↓	46.89	↑

Key: ● No Change ↑ Increase ↓ Decrease

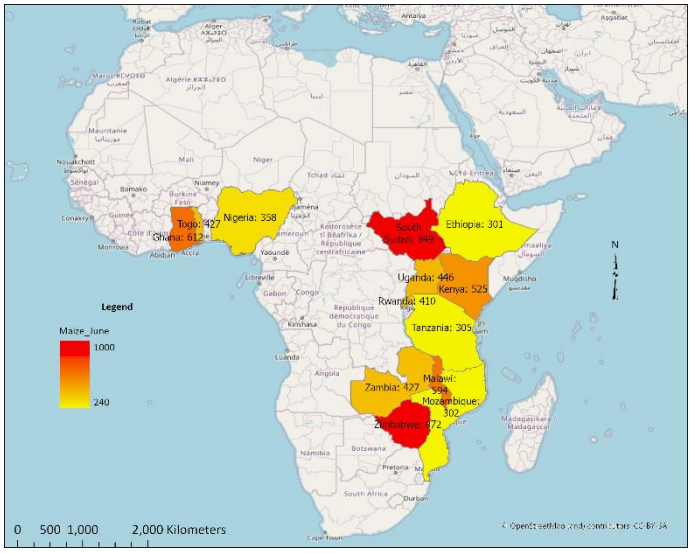
Figure 1: Hunger Hotspots Snapshot, June 2025

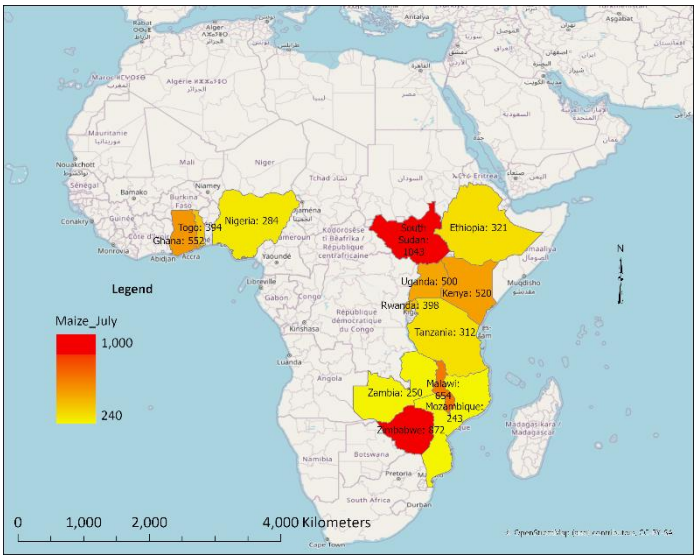


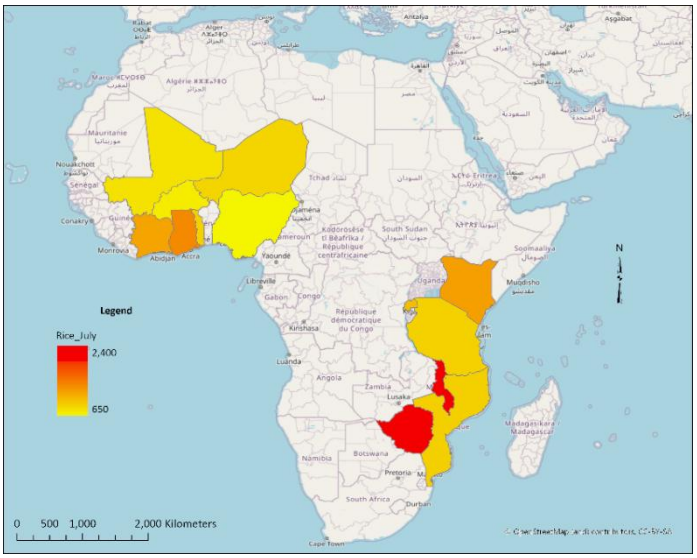
[1] People with Insufficient Food Consumption (IFC) refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS). The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets and how frequently food is 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).

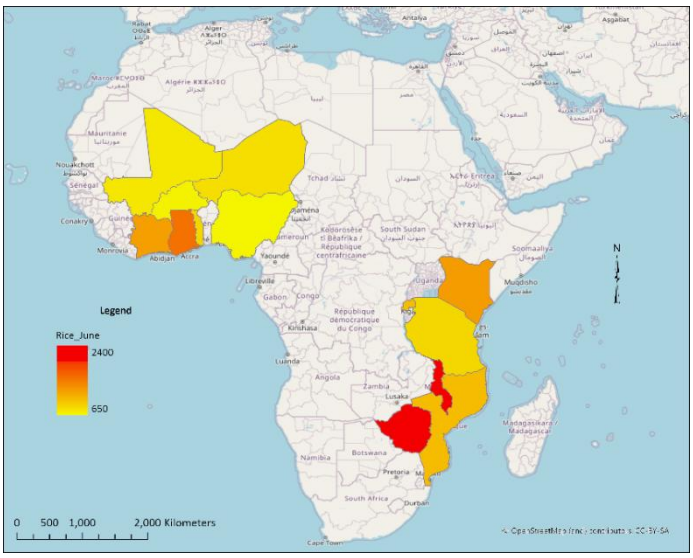
Figure 2 presents maize and rice prices across the monitored countries as of July 2025. Maize prices (in USD per metric tonne) was highest in South Sudan (USD 1,043/MT), followed by Zimbabwe USD 872/MT, Malawi USD 654/MT, Ghana (USD 553/MT), Kenya (USD 520/MT), and Uganda (USD 500/MT). Zambia recorded the lowest maize price at USD 251/MT. Rice prices, on the other hand, remain highest in Malawi (USD 2,395/MT) and Zimbabwe (USD 2,235/MT), while it is lowest in Nigeria (USD 653/MT) and Burkina Faso (USD 719/MT).

Figure 2: The Prices of Maize and Rice Across All Monitored Countries (USD/MT)









Global Market Update

The FAO Food Price Index (FFPI) (**Figure 2**) rose to 130.1 points in July 2025, up 1.6% from June. This increase was driven by higher prices for meat and vegetable oils, which outweighed declines in cereals, dairy, and sugar. Compared with July 2024, the index is 9.2 points (7.6%) higher, though it remains 18.8% below its peak in March 2022, indicating a moderate recovery in global food prices but still elevated levels relative to pre-crisis norms. The International Grains Council (IGC) Grain and Oilseeds Index (GOI) fell by 3.2% year-on-year in July 2025, driven by declines in the wheat, rice, and soya bean sub-indices, despite increases in maize and barley sub-indices. Rice recorded the largest drop of 32.4%, while maize saw a 12.6% increase compared to the past year. On a month-on-month basis, wheat, rice, and soya bean sub-indices also declined, whereas maize and barley posted gains.

Figure 3: FAO Food Price Index (FFPI)2

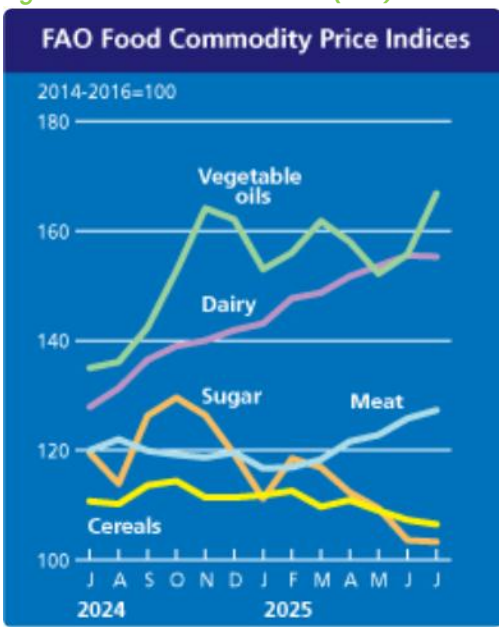


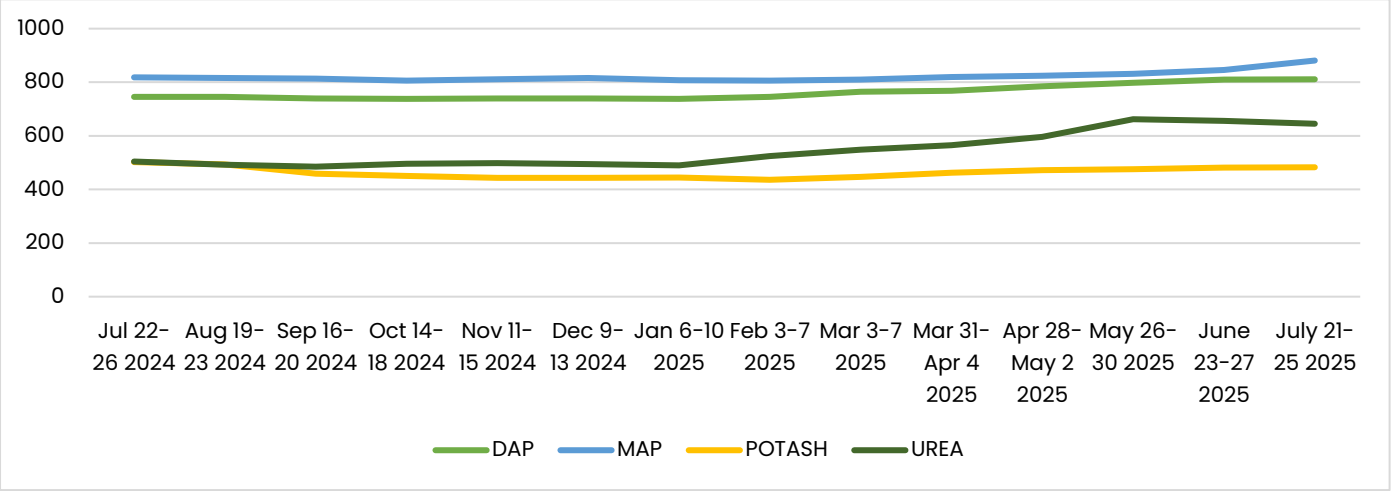
Table 2: IGC GOI Commodity Price Indices 3

Jan 2000 = 100	31-July	% Change 1M	% Change 1Y
GOI	212.87	-	*-3.28*
Wheat	193.36	*-1.59*	*-2.08*
Maize	223.62	*2.37*	*12.67*
Rice	166.90	*-1.35*	*-32.41*
Soya beans	204.77	*-0.57*	*-1.46*
Barley	223.44	*1.86*	*4.46*

Global Fertiliser Prices

All fertiliser types have marginally increased over the past month, except for urea, which saw a minor decline of 1.7%. Compared to a year ago, the price of urea has gone up by 28%, followed by DAP and MAP by 8.9% and 7.7% respectively. Potash, on the other hand, has seen a marginal decline of 3.8%.

Figure 4: Dry Fertiliser Prices ($/MT)



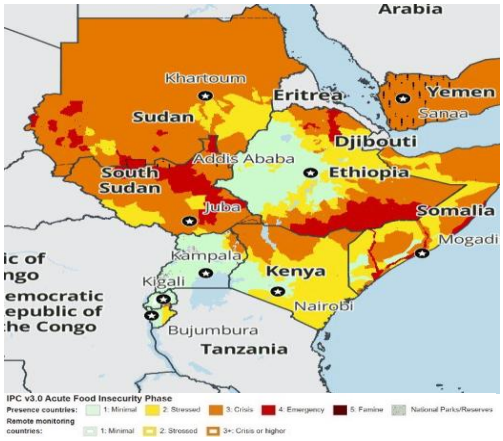
Source: Author's construction based on DTN [4]

[2] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[3] https://www.igc.int/en/markets/marketinfo-goi.aspx
[4] https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/05/28/urea-leads-major-fertilizer-prices

East Africa Food Insecurity Updates

Food Security Outlook

Figure 5: East African Countries Food Security Outlook, July 2025



Ethiopia is facing a critical food security crisis, with peak food assistance needs expected through August 2025 due to ongoing drought, failed harvests, and conflict-related disruptions.[5] Although a seasonal decline in needs is anticipated from September onwards, high levels of food insecurity will persist in northern, eastern, and southern regions. The failure of the Belg rains in early 2025 severely impacted crop production in Tigray, Amhara, and Oromia, while pastoral areas in Afar and Somali regions continue to suffer from prolonged drought, poor livestock conditions, and limited access to water and pasture.

Kenya is experiencing mixed food security conditions, with poor households in marginal agricultural areas such as Kitui, Makueni, Meru North, Lamu, and Taita Taveta facing below-average crop production and early depletion of food stocks due to poor long rains and limited income from crop sales and informal activities.[6] This is expected to increase market reliance and food assistance needs through December. In contrast, areas like Kilifi, Kwale, Embu, and Tharaka Nithi are likely to see average to above-average production, supporting better food access. Urban poor households are also facing tightening food access due to high staple prices and limited income opportunities. Overall, food assistance needs will gradually rise through October, peaking in September, driven by reduced household food availability, income constraints, and ongoing lean season conditions.

South Sudan is facing an extreme food security crisis, with Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) conditions persisting in Nasir and Ulang, where hunger, malnutrition, and mortality have reached alarming levels.[7] Acute malnutrition rates among children under five exceed 25%, and a significant share of households are experiencing severe food deficits. Conflict, cholera outbreaks, and displacement are compounding the crisis, restricting access to food and income sources. Neighbouring counties in Upper Nile and northern Jonglei are facing similar conditions, with insecurity and funding shortfalls hindering humanitarian aid delivery. Many households are relying on wild foods and fishing, but insecurity often limits access, and even where aid is delivered, it remains insufficient to meet needs. The situation is expected to remain critical until the end of the lean season in October.

Prevalence of Insufficient Food Consumption

In July 2025, the number of people experiencing insufficient food consumption across five selected East African countries remained stable at 45.3 million (Table 3). Nonetheless, this represents a significant increase of approximately 35% compared to July 2024. Rwanda, South Sudan, and Uganda were the primary drivers of this rise, with year-on-year increases of 38.5%, 36.1%, and 109.3%, respectively. The current figure also exceeds that of July 2023, when 34 million people were affected, marking a 33% increase over the two years.

[5] https://fews.net/east-africa/ethiopia
[6] https://fews.net/east-africa/kenya
[7] https://fews.net/east-africa/southsudan

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (July 2025)[8]

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 (%)
Kenya	51.40	13.60	13.60	26.46	0.00 ●	0.00 ●	12.40 ↑
Rwanda	12.30	3.60	3.60	29.27	0.00 ●	38.46 ↑	16.13 ↑
South Sudan	11.00	4.90	4.90	44.55	0.00 ●	36.11 ↑	25.64 ↑
Tanzania	56.30	5.20	5.20	9.24	0.00 ●	0.00 ●	4.00 ↗
Uganda	42.70	18.00	18.00	42.15	0.00 ●	109.30 ↑	81.82 ↑

**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%)

Commodity Prices

Key drivers of commodity prices in EA

	**Conflicts**	Conflicts and insecurity persist, particularly in South Sudan and Ethiopia, preventing price recovery from previously high levels despite ongoing harvests.
	**Seasonal Dynamics**	The October-December season, including Tanzania's main harvest is improving supplies in most markets, leading to lower prices across the region. However, above average rainfall in some areas may have hindered smooth movement of crops hence affecting prices.
	**Macroeconomic Shocks**	South Sudan continues to experience high prices due to poor macroeconomic conditions, an influx of returnees from Sudan, trade disruptions, and localised poor harvests.

Maize

Figure 6: National average price spreads for maize across select East African Countries[9]

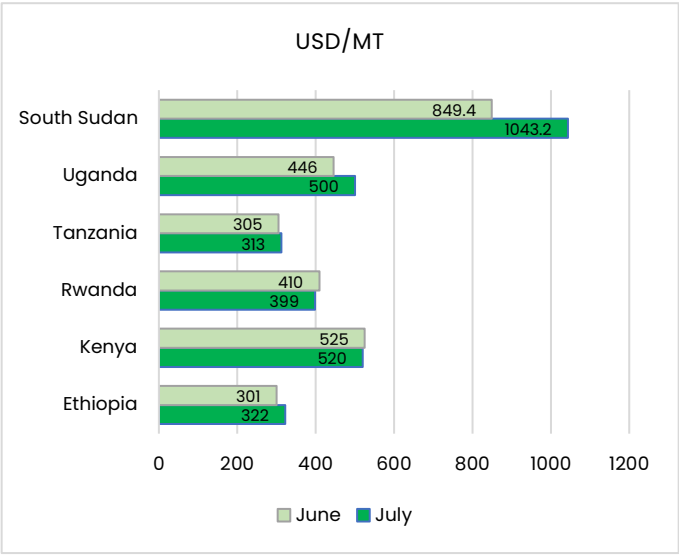


Figure 6 highlights the maize price distribution (in USD) across six Eastern African countries, with four of them currently experiencing month-on-month increases from June to July 2025. Based on data from the World Food Programme (WFP), **South Sudan** is reporting the highest maize prices in the Eastern African region, with a steep 23% month-on-month increase to USD 1,043.2/MT. This is indicative of persistent macroeconomic instability, driven by a significant depreciation of the national currency that has exerted upward pressure on cereal prices[10]. According to data compiled and analysed by the **Kenya** Ministry of Agriculture and Livestock Department (KAMIS), maize prices slightly stabilised in July after several months of continuous increase, an average of USD 520/MT, a 1% decrease from the previous month as the country enters its major harvest season. **Tanzania** and **Uganda** recorded low to moderate maize price increases in USD terms by 2% to USD 311/MT and 12% to USD 500/MT. These movements are largely attributed to the appreciation of local currencies against the United States Dollar, which has influenced trade dynamics and pricing in regional agricultural markets. Conversely, **Rwanda** experienced a slight 3% price decrease month-on-month to USD 399/MT, indicating the increased supply due to Season B Maize harvests.

[8] Author's construction based on WFP HungerMap Live

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

[10] GIEWS FPMA Bulletin July 2025 Food Price Monitoring and Analysis (FPMA) Bulletin #6, 11 July 2025

Maize prices in local currency across the East African region (**Table 4**) show mixed trends, with most countries recording modest month-on-month increases. In **Tanzania,** prices have remained relatively stable, showing a 3% decline compared to the past 1–3 months. However, they are still 20% to 33% higher than the same period 6–12 months ago reflecting limited domestic stocks and strong regional demand from neighbouring countries. **Uganda, Ethiopia,** and **South Sudan** continue to show upward trends over the past 1–12 months, reflecting ongoing macroeconomic challenges and tightening supply conditions. Uganda's maize prices recorded price increases ranging from 2.47% to 64.38%, South Sudan from 6.67% to 94.10%, and Ethiopia from 4.17% to 19.45%. These significant price movements are largely driven by depleted maize stocks and heightened regional demand, underscoring the need for coordinated trade and food security interventions. Conversely, **Kenya** recorded a marginal month-on-month decline in maize prices by 0.94%, reaching KES 66.88/Kg[11], signalling the onset of the harvest season. Despite this slight easing, prices remain elevated—7.84% and 27.7% higher compared to the past three and 12 months, respectively highlighting continued market tightness and underlying supply challenges.

Table 4: Percentage changes in maize prices in East Africa[12]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,450.00	9.22 ↑	19.45 ⊗	17.00 ⊗	4.17 ▲
Kenya	Maize	National Average, Retail, KES/KG	66.88	-0.94 ↘	7.84 ↑	21.81 ⊗	27.71 ⊗
Rwanda	Maize	National Average, Retail, RWF/Kg	573.02	-2.14 ↘	6.61 ↑	-12.20 ↓	
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	4,718.57	6.67 ↑	28.87 ⊗	66.26 ⊗	94.10 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	80,000.00	0.00 ●	-3.03 ↘	20.00 ⊗	33.33 ⊗
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,827.40	2.47 ▲	31.19 ⊗	42.13 ⊗	64.38 ⊗

Note: Last price is for July 2025, * June 2025, and ** May 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 7: National average price spreads for rice across select East African Countries[13]

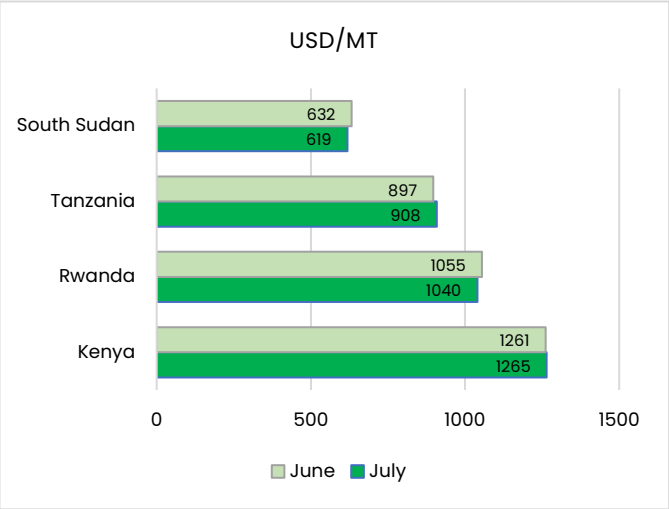


Figure 7 shows rice prices (USD) across four select Eastern African countries in July, with only modest month-on-month changes, indicating relatively stable but varied market conditions. **Kenya** recorded the region's highest rice price at USD 1,265/MT, a 0.3% uptick, driven by strong domestic demand and supply constraints. **Tanzania saw a**, 1.3% increase due to currency appreciation. In contrast, **South Sudan** and **Rwanda** continued to experience downward pressure on rice prices, with the former recording a 2.1% month-on-month decline, with prices falling to USD 619/MT, while the latter saw a 1.4% decrease to USD 1,040/MT. Despite the declines, Rwanda's prices remain among the highest in the region, while South Sudan's are comparatively lower, indicating varied market conditions across countries.

The local currency price movements (**Table 5**) largely mirrored USD-denominated trends across the region, except for Tanzania, whose USD prices are influenced by currency appreciation. **Kenya** experienced a slight month-on-month increase of 0.29%, with prices remaining 6.19% higher year-on-year, indicating gradual recovery and stable market conditions. **Rwanda** saw modest declines of 1.34% and 1.18% over the past one and three months, respectively, reflecting the onset of the harvest season. Nonetheless, prices are still 10.04% higher than six months ago, driven by earlier supply constraints and sustained demand.

[11] Authors construction based on Kenya Ministry of Agriculture Market Information System Data KAMIS
[12] Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania
[13] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

Conversely, although **South Sudan** and **Tanzania** recorded the lowest rice prices in USD terms, their domestic retail prices in local currency rose sharply, by 19.19% and 20.26% over the past six months, and 72.93% and 22.37% year-on-year, respectively. This volatility is a combination of macroeconomic pressures, seasonal variability, and increasing regional demand, highlighting the need for targeted interventions to stabilise food markets and improve affordability.

Table 5: Percentage changes in rice prices in East Africa[14]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	162.56	0.29 ▲	-0.76 ↘	0.28 ▲	6.19 ↑
Rwanda	Rice	National Average, Retail, RWF/Kg	1,495.24	-0.86 ↘	-0.32 ↘	10.04 ↑	
South Sudan	Rice	National Average, Retail, SSP/Kg*	2,799.79	-1.34 ↘	-1.18 ↘	19.19 ⊗	72.93 ⊗
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	232,500.00	-1.06 ↘	-5.10 ↓	20.26 ⊗	22.37 ⊗

Note: Last price is for May 2025, * April 2025, and ** March 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 8: National average price spreads for beans across select East African Countries[15]

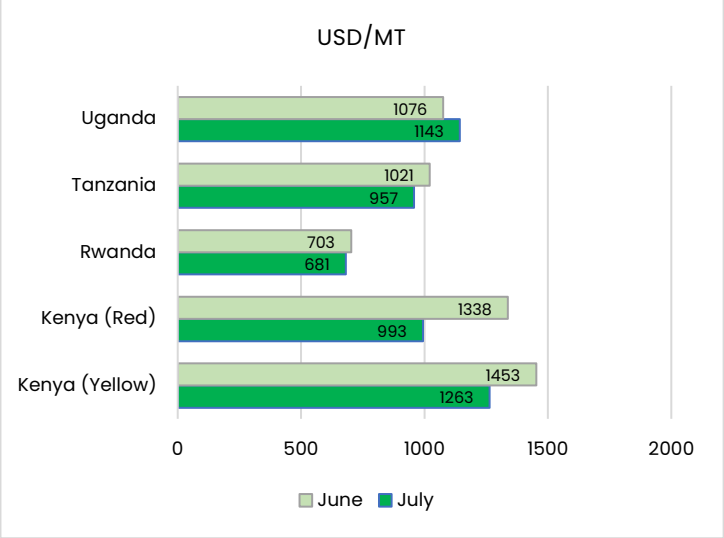


Figure 8 shows bean price trends in USD across four selected East African countries, with notable shifts observed, largely influenced by seasonal harvests and macroeconomic factors. In **Tanzania** and **Rwanda**, prices declined moderately by 6.3% and 3.1% respectively, reaching USD 957/MT and USD 681/MT, driven by favourable green harvests and effective stock management since the second quarter of the year. **Kenya** experienced significant month-on-month declines in two major bean varieties: Yellow-Green beans dropped by 13%, while Red Haricot varieties fell by 26%—reflecting increased market supply following the harvest. In contrast, **Uganda**'s bean prices rose by 6.3%, attributed to the appreciation of the local currency against the USD, which has kept prices elevated despite regional supply improvements.

In local currencies, as shown in **Table 6**, the bean prices in the region have generally recorded slight to moderate declines over the past 1-3 months. In Kenya, where bean prices had remained persistently high earlier this year, both Yellow-Green and Red Haricot varieties saw notable month-on-month drops of 13.56% and 25.78%, respectively. These prices are also lower than a year ago by 10.23% and 5.07%, reflecting improved supply following the harvest season. **Tanzania**'s bean prices have remained stable to moderately lower, with a 15.91% decline over the past 1–12 months. In **Rwanda**, prices have decreased by 2.59% and 9.64% over the past one and three months, respectively, due to the onset of the harvest season. However, prices remain 4.17% higher than six months ago, indicating lingering effects of earlier supply constraints. **Uganda**'s bean prices dropped by 4.8% month-on-month, reflecting the impact of the ongoing harvest and improved market supply. However, prices remain elevated compared to the past 3 - 12 months, with increases ranging between 2.13% and 6.09%.

Table 6: Percentage changes in bean prices in East Africa[16]

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

[15] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	162.36	-13.04	-13.56	-12.63	-10.23
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	127.66	-25.78	-10.18	-8.25	-5.07
Rwanda	Beans	National Average, Retail, RWF/Kg	978.33	-2.59	-9.64	4.17	
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	92,500.00	0.00	-7.50	-7.50	-15.91
Uganda	Beans	National Average, Retail, UGX/Kg*	4,076.83	-4.81	6.07	6.09	2.13

Note: Last price is for May 2025, * April 2025, and ** March 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 9: National average price spreads for wheat across select East African Countries

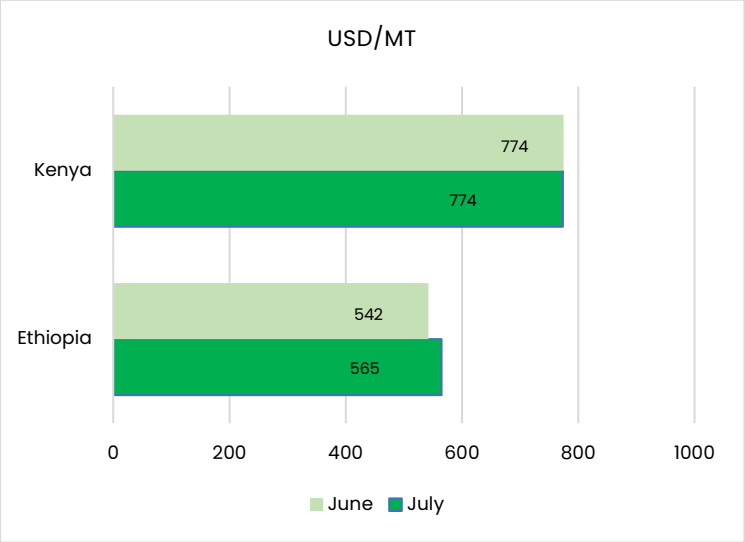


Figure 9 presents wheat price trends in USD for two selected East African countries, Kenya and Ethiopia, highlighting contrasting market dynamics. In **Kenya,** wheat prices stabilised at USD 774/MT, primarily due to slight currency fluctuations. In contrast, **Ethiopia** recorded a 4% increase in wheat prices, reaching USD 565/MT, largely attributed to poor Belg season harvests and rising regional demand[17]. However, the global price decline likely tempered what could have been a more significant price increase.

Similar patterns are reflected in local currency terms (**Table 7**). In Kenya, wheat prices dipped marginally by 0.10% month-on-month but remain elevated by 15.23% and 3.74% compared to levels observed in the past six and 12 months, respectively. In Ethiopia, prices rose by 6.21% month-on-month and remain higher than three, six, and 12-month levels by 3.66%, 12.46% and 10.51%, respectively. These increases are driven by strong regional demand, seasonal supply limitations, and broader macroeconomic constraints.

Table 7: Percentage changes in wheat prices in East Africa[18]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	7,806.25	6.21	3.66	12.46	10.51
Kenya	Wheat	National Average, Retail, KES/KG	99.44	-0.10	-6.78	15.23	3.74

Note: Last price is for May 2025, * April 2025, and ** March 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

Fertiliser markets in Kenya and Rwanda show contrasting patterns in price volatility and stability. In **Kenya**, prices vary across fertiliser types. Calcium Ammonium Nitrate (CAN) saw a sharp month-on-month decline of 23.23%, while Diammonium Phosphate (DAP) and NPK recorded modest changes, with DAP rising 2.32% and NPK declining slightly by 0.93%. Over the medium term, DAP and NPK prices have increased, but all three types remain lower year-on-year in the range of 3.68% to 15.47%, suggesting improved supply and possible subsidy effects. In **Rwanda**, NPK fertiliser prices in USD terms remained relatively stable, with a slight month-on-month increase of 0.75%. While short-term changes are minimal, prices rose by 3.32%

[17] EAGC Grain Watch Q2-2025 GW-Q2-2025-EAGC-RATIN

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

over six months and 8.18% year-on-year, reflecting rising input costs and sustained regional demand.

Table 8: Percentage changes in fertilizer prices in East Africa[19]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	78.19	-23.23 ↓	10.79 ↑	-2.94 ↘	-15.47 ↓
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	115.29	2.32 ▲	14.36 ↑	16.35 ⊗	-12.04 ↓
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	100.48	-0.93 ↘	10.59 ↑	11.52 ↑	-3.68 ↘
Rwanda	NPK	National Average USD/50kg	746.58	0.75 ▲	-0.11 ↘	3.32 ▲	
Rwanda	Urea	National Average USD/50kg	747.27	5.89 ↑	0.77 ▲	8.18 ↑	

Note: Last price is for April 2025, * March 2025, and ** February 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[20]

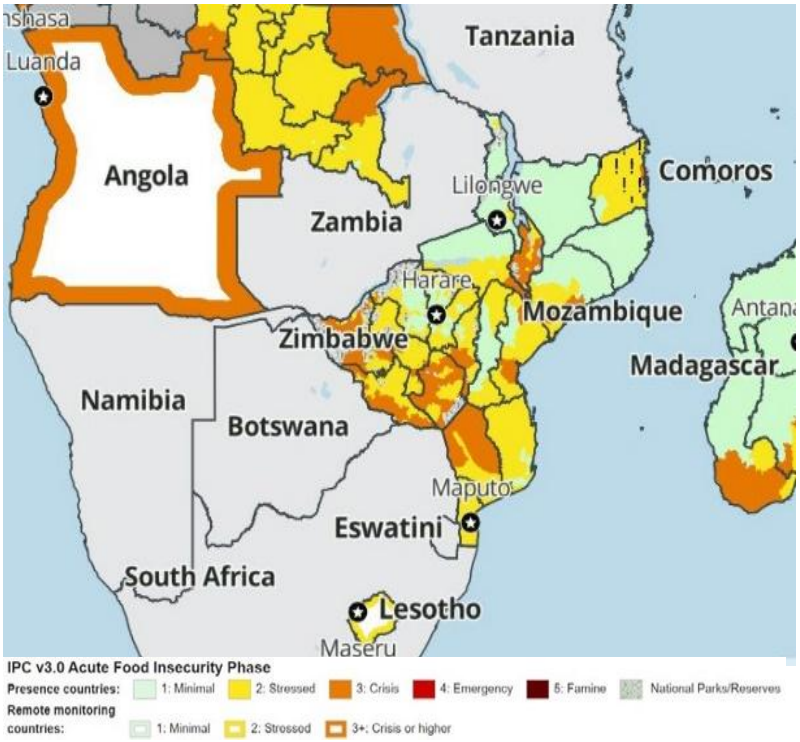
In **East Africa**, end-of-season conditions vary across countries. In **Ethiopia**, the harvesting of Belg season maize concluded in July with varied outcomes, western regions recorded favourable yields, while northern and central areas experienced poor performance due to drier-than-normal weather and ongoing socio-economic challenges, particularly those linked to the previous conflict in the north. In **South Sudan**, the main season cereal harvesting has commenced in Central and Western Equatoria, with planting and vegetation development continuing elsewhere. In **Kenya**, main season crops in unimodal and major producing regions (Rift Valley, Western, and Central) are developing normally, supported by timely and abundant rainfall. Land preparation for main season rice is underway, with planting scheduled for August. In bimodal and marginal eastern regions, long-rain cereal harvesting is ongoing. In **Uganda**, first-season cereal harvesting in the bimodal central and southern regions is complete or nearly complete under favourable conditions, supported by adequate rainfall despite a delayed onset. However, unimodal northern regions face persistent dry conditions, impacting crops in the vegetative to reproductive stages due to below-average rainfall since June. In the northwest, second-season maize planting is underway but delayed, with below-normal rains affecting seasonal progress. In **Rwanda**, vegetation conditions are near to above normal at the end of the harvesting season, despite generally dry conditions during the mid-February to May long rains. In contrast, **Burundi** is expected to experience below-average production for *Season B* cereals, due to erratic rainfall during the same period. In **Tanzania**, *Masika* season cereal harvesting is underway in bimodal areas along the north and northern coast, with overall favourable conditions, and harvesting activities are anticipated to conclude in August.

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

[20] Crop Monitor EW No. 107 – August 2025: EarlyWarning_CropMonitor_202508.pdf

Southern Africa Food Security Update

Figure 10: Southern Africa Countries Food Security Outlook, July 2025



Malawi is experiencing mixed food security conditions, with seasonal improvements expected in northern and central regions despite the recent below-average harvests that allow households to consume their own-produced food through late 2025.[21] However, southern Malawi faces worsening food insecurity following a significantly below-average harvest caused by erratic rainfall, high temperatures, and damage from Tropical Cyclones Chido and Jude. Poor households in southern districts such as Neno, Mwanza, Blantyre, Phalombe, Mulanje, and Thyolo are expected to deplete food stocks earlier than usual and face reduced income opportunities and high food prices, leading to increased reliance on markets and rising food assistance needs by the end of 2025.

Mozambique's food security is deteriorating, with the anticipated seasonal improvements from the 2024/25 agricultural season expected to be short-lived due to irregular rainfall, high temperatures, and the impact of three tropical cyclones, which led to a below-average harvest and widespread damage.[22] While vegetable production may temporarily improve food access in some areas, poor households, especially in the south, are expected to rely on markets earlier than usual, increasing food assistance needs through late 2025. In the north, conflict-induced displacement, particularly in Cabo Delgado, continues to disrupt livelihoods and access to food, with over 609,000 internally displaced persons relying heavily on humanitarian aid. Additionally, post-election unrest in late 2024 further disrupted the economy, leading to job losses, and increased vulnerability in urban areas. Although aid has reached many affected populations, it remains insufficient and is expected to decline further due to resource constraints, exacerbating food insecurity across the country.

Zimbabwe is experiencing generally favourable food security conditions after a significantly above-average 2025 harvest, supported by good seasonal rainfall.[23] National maize production is estimated to be 260 % higher than in 2024 and 160 % above the 10-year average, allowing most households to rely on their own-produced food through at least December 2025. Food prices have declined countrywide, improving market access for poor households, while income from cash crops like tobacco and cotton is also above average. Although food assistance needs are expected to rise gradually through December, especially in typical deficit-producing districts where stocks may run out earlier, overall needs are projected to be lower than last year and near normal. Stable currency conditions have further supported price stability and household purchasing power.

[21] https://fews.net/southern-africa/malawi
[22] https://fews.net/southern-africa/mozambique
[23] https://fews.net/southern-africa/zimbabwe

Prevalence of Insufficient Food Consumption

In July 2025, 22.2 million people are facing insufficient food consumption in Malawi, Mozambique, Zambia, and Zimbabwe unchanged from June (**Table 9**). Compared to July 2024, the region saw an improvement, with 700,000 fewer people affected. This positive change is entirely due to Zimbabwe, which recorded a 13.4% year-on-year decline in the number of people with insufficient food consumption. However, the current figure remains higher than in July 2023, when 21.1 million people were affected, representing a 5% increase over the past two years.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (July 2025)[24]

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	51.11
Mozambique	29.50	7.60	7.60	25.76	0.00	0.00	-8.43
Zambia	17.40	3.30	3.30	18.97	0.00	0.00	-23.26
Zimbabwe	15.20	4.50	4.50	29.61	0.00	-13.46	12.50

*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.

Maize

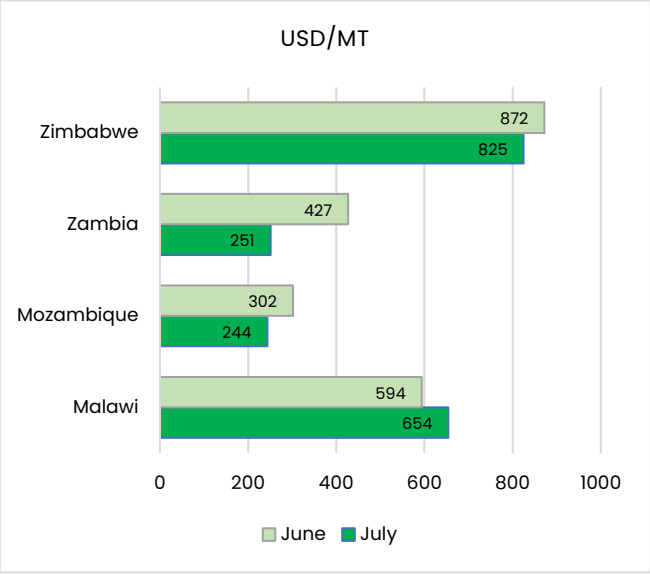


Figure 11: National average price spreads for maize across select Southern African Countries[25]

Figure 11 shows contrasting movements in maize prices in USD across four Southern African countries: Zimbabwe, Zambia, Mozambique, and Malawi. **Malawi** recorded a 10% price increase month-on-month, with prices rising to USD 654/MT[26] despite continued maize imports in the country. In contrast, **Zambia** experienced a sharp 41% decline, dropping to USD 251/MT, which reflects improved supply conditions due to increased harvest inflows and the strengthening of the national currency against the United States dollar. **Mozambique** also saw a 19% price decrease, with prices falling to USD 244/MT, indicating a moderate easing in market pressures,

[24] Author's construction based on HungerMap

[25] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

[26] It is important to note that the Reserve Bank of Malawi maintains an overvalued exchange rate for the Malawi Kwacha (MWK) by pegging it to the US Dollar at a rate between MWK 1,720 and MWK 1,800 per USD. This is significantly lower than the prevailing black-market rate, which ranges from MWK 4,000 to MWK 5,000 per USD. Such a disparity distorts actual price signals and undermines the ability to accurately assess market-driven price movements

likely influenced by recent harvests. According to the U.S. Department of Agriculture's Foreign Agricultural Service , Mozambique's maize harvest is forecasted at 1.8 million tons, up from 1.4 million tons the previous year, aligning with the five-year average but still 22% below the annual requirement. Meanwhile, **Zimbabwe** recorded a modest 5% price decrease, with prices dropping to USD 825/MT, attributed to an above-average 2025 harvest. This improvement was driven by favourable seasonal rainfall between October 2024 and March 2025, which significantly enhanced household access to food across the country[27].

As shown in **Table 10**, maize prices in local currency show a mixed trend, with prices in **Malawi** remaining moderate to significantly higher compared to the past one, three, and 12 months by 9.9%, 20% and 42.2% respectively. Meanwhile, maize prices in **Mozambique** are considerably lower compared to the past one and three months by 19% and 45.9% reflecting the above harvests the country has recently experienced. In **Zambia**, prices have declined significantly compared to the past 1-12 months, with current prices being 35.38% lower compared to last year, suggesting a period of surplus supply from the recent bumper harvest, supported by government maize export restrictions that were initiated early this year[28]. **Zimbabwe** presents a mixed picture. Maize prices in Epworth (USD/kg) have declined moderately to significantly over the past one, three, and six months, by 0.41%, 1.13%, and 22.63% respectively. However, prices remain 47.18% higher year-on-year, pointing to long-term inflation despite recent easing. Meanwhile, maize meal prices in Bulawayo have increased by 3.85% over the past month but remain moderately lower compared to the past three and six months, with declines of 11.35% and 17.72% respectively, indicating ongoing volatility in processed maize products.

Table 10: Percentage changes in maize prices in Southern Africa[29]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,125.00	9.93 ↑	20.04 ⊗	-4.19 ↘	42.26 ⊗
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	15.40	-19.19 ↓	-45.91 ↓		
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	5.69	-52.13 ↓	-37.17 ↓	-40.67 ↓	-35.38 ↓
Zimbabwe	Maize	Epworth, USD/kg*	0.96	-0.41 ↘	-1.13 ↘	-22.63 ↓	47.18 ⊗
Zimbabwe	Maize meal	Bulawayo, USD/kg*	0.84	3.85 ▲	-11.35 ↓	-17.72 ↓	12.37 ↑

Note: Last price is for May 2025, * April 2025, and ** March 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 12: National average price spreads for Rice across select Southern African Countries

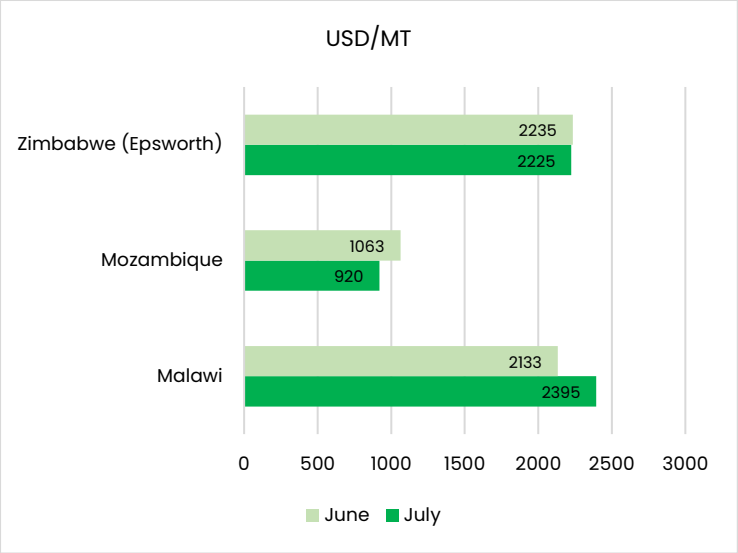


Figure 12 shows rice prices in USD for **Zimbabwe**, Mozambique, and Malawi. Zimbabwe recorded the highest prices at USD 2,225/MT, a 0.4% month-on-month decline. A similar trend can be observed in **Mozambique**, where prices have dropped by 13% to USD 920/MT, with both countries experiencing improved supply conditions due to favourable harvests supplemented by imports. In contrast, **Malawi** has seen an uptick in prices, rising to USD 2,395/MT, a 12% increase month-on-month due to increased supply constraints.

As illustrated in **Table 11**, local rice prices demonstrate varied trends across the region. In **Mozambique**, prices have shown a clear downward momentum, declining by 13.4% and 14.74% over the

[27] Mozambique FEWS NET Report Mozambique | FEWS NET
[28] Now gov't bans maize exports – Daily Nation
[29] Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia and Zimbabwe

past one and three months, respectively. These reductions likely reflect the impact of recent above-average harvests, contributing to improved market supply. In **Zimbabwe**, rice prices present a mixed picture. Current prices are lower by 0.45% and 2.05% compared to the past one and six months, indicating short-term easing. However, prices remain moderate to significantly elevated over longer timeframes 5.95% higher than three months ago and 76.59% above last year's levels, highlighting persistent long-term inflationary pressure on the economy. Conversely, **Malawi** has experienced a notable upward trend in rice prices, with increases of 12% over the past month and 6.94% over the past three months. Alarmingly, prices are 49% higher compared to six months ago, suggesting the impact of a poor harvest season, supply shortages, and macroeconomic pressures such as fuel shortages that increase transport costs.

Table 11: Percentage changes in rice prices in Southern Africa[30]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	4,116.67	12.00	4.27	49.23	
Mozambique	Rice (imported)	National Average, MZN/Kg	58.17	-13.40	-14.74		
Zimbabwe	Rice	Epworth, USD/kg*	2.23	-0.45	5.95	-3.05	76.59

Note: Last price is for May 2025, * April 2025, and ** March 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 13: National average price spreads for beans across select Southern African Countries

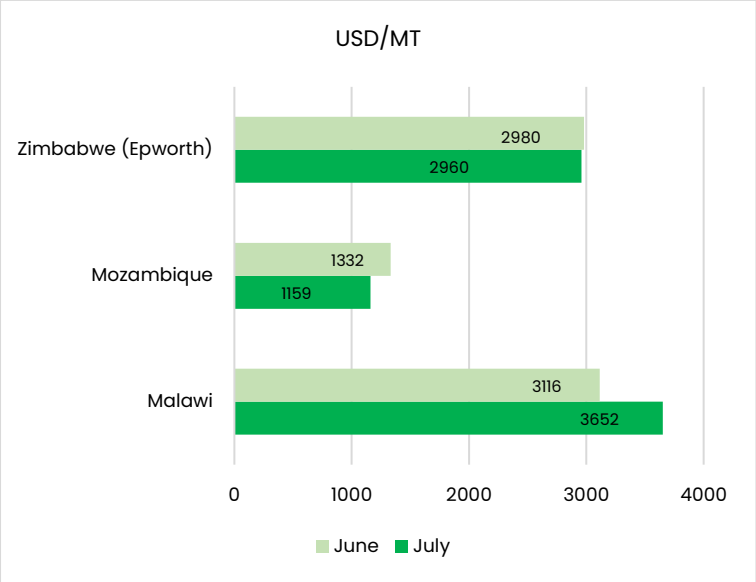


Figure 13 illustrates bean prices in USD/MT per across selected Southern African countries, revealing divergent market trends. In **Zimbabwe**, prices have slightly declined by 1%, reaching USD 2,960/MT, reflecting the impact of a favourable harvest season and relative market stability. **Mozambique** recorded a notable month-on-month decline of 13%, with prices falling to USD 1,159/MT, driven by improved supply conditions for the crop, marking the second consecutive month of decline.

In contrast, **Malawi** experienced a significant price increase, with bean prices rising by 13% to USD 3,652/MT. This sharp uptick is attributed to supply constraints stemming from poor harvests, which have tightened market availability. Similarly, **Table 12** further demonstrates the local bean prices in these countries, with Malawi showing bean prices increasing by 17.22% and soya bean prices by 26.91% over the past month. Over three months, prices have surged further beans by 31.05% and soya beans by 52.76% indicating sustained market inflation. Compared to six months ago, bean prices are 39.37% higher, while soya beans have seen a modest increase of 0.63%, reflecting the impact of poor harvests and tightening supply conditions.

In contrast, Mozambique has maintained consistently low prices, with reductions of 12.97% and 16.87% over the past 1-3 months, indicating a stable and well-supplied market supported by favourable harvest conditions. Similarly, Zimbabwe's bean prices have declined over the short to medium term, falling by 0.67% over the past month and up to 60% over the past six months, indicating a clear downward trend in recent market activity. However, a year-on-year comparison reveals a contrasting picture, with current prices 46.53% higher than in the same period last year. This sharp annual increase reflects the residual effects of previous drought conditions and the gradual pace of market recovery, highlighting persistent

[30] Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

inflationary pressures despite recent price softening. These contrasting movements underscore the varying market pressures across the region: stability in **Zimbabwe**, declining prices in **Mozambique**, and rising costs in **Malawi.**

Table 12: Percentage changes in bean prices in Southern Africa[31]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	6,316.67	17.22	31.05	39.37	
Malawi	Soyabeans	National Average, MWK/Kg	2,633.33	26.91	52.76	0.63	
Mozambique	Beans	National Average, MZN/Kg	73.25	-12.97	-16.87		
Zimbabwe	Beans	Epworth, USD/kg*	2.96	-0.67	-1.33	-60.00	46.53

Note: Last price is for May 2025, * April 2025, and ** March 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 main season harvest concluded in June, marking a recovery from the drought-affected conditions of 2024. Despite localised impacts from dry spells and storms, the overall weather outlook for the November 2024 to June 2025 cropping season has improved, supporting expectations of a near-average regional maize production estimated at 38.5 million tonnes a 20% increase compared to the previous year. Notably, **Zimbabwe, Zambia,** and South Africa are projected to record substantial production gains, driven by favourable climatic conditions and improved agricultural performance.

In **Malawi**, the U.S. Department of Agriculture (USDA) forecasts maize production at 1.8 million tonnes, which is near the national average. This represents a substantial increase compared to the 2024 output of 1.4 million tonnes, signalling a positive recovery following last year's drought-affected season.

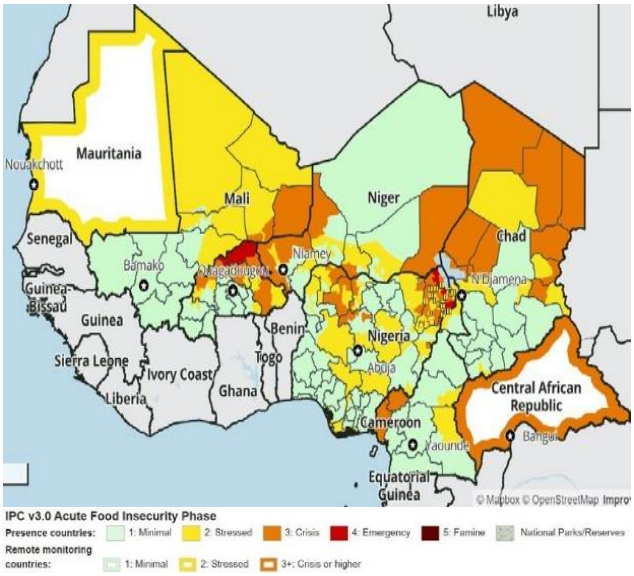
In **Zambia**, harvesting of the 2025 main season cereals concluded in June, with the total production projected to be 20% above the national average, doubling last year's output, which was severely impacted by historic drought conditions. Despite some localised dry spells, favourable rainfall from January to April 2025 supported strong yields, contributing to a significant recovery in national production.

In **Zimbabwe**, wheat crops are currently in the vegetative to reproductive stages, with harvests expected in September. This season has seen a significant increase in the area under wheat cultivation, driven by government support, particularly through infrastructure investments aimed at ensuring access to electricity for irrigation.

[31] Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

West Africa Food Security Update

Figure 14: West African Countries Food Security Outlook, July 2025



Burkina Faso continues to face a challenging food security situation, primarily driven by persistent insecurity from armed terrorist groups, especially in the East, Centre-East, and Sahel regions.[32] These threats restrict population movement, disrupt market supply chains, and limit access to food and livelihoods, particularly in towns like Djibo, Diapaga, and Sebba. Although some areas have seen improved access to fields and markets due to reduced incidents and increased returns of displaced populations, food prices remain high, especially in hard-to-reach areas, due to long supply delays and high transport costs. Food assistance has been irregular and insufficient in many areas, forcing households to adopt severe coping strategies. However, recent government efforts and improved market supply have helped stabilise prices in some regions.

Mali's food security situation remains fragile due to escalating insecurity in the centre and north, now extending to southern regions, which disrupts livelihoods, market access, and humanitarian assistance.[33] Market supplies are generally sufficient, but insecurity and poor road conditions have caused significant price increases, 25-59 % above the five-year average in some areas. These elevated prices are expected to persist through the harvest period, keeping food access constrained for vulnerable households.

Niger is facing significant food security challenges, particularly among poor households in conflict-affected regions such as Tillabéry, Diffa, Tahaoua, Maradi, and increasingly Dosso, where insecurity has disrupted livelihoods, displaced over 459,000 people, and driven up food prices.[34] Even in non-conflict areas, poor households are expected to experience food consumption deficits during the July–September lean season due to depleted stocks and reduced income opportunities. Although market supplies are generally sufficient and food prices have declined compared to last year, they remain at or above five-year averages for some staples. Food security is expected to improve from October with new harvests, but conflict-affected areas will continue to face elevated needs.

Nigeria is experiencing widespread acute food insecurity driven by prolonged conflict, economic instability, and weather shocks such as dry spells and flooding.[35] Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes persist in conflict-affected areas of the Northeast, Northwest, and North Central regions, with inaccessible areas like Abadam and Bama facing extreme conditions due to limited access to food, markets, and livelihoods. Attacks by insurgents and armed groups continue to displace populations and restrict agricultural activities. Inflation and high transportation costs further exacerbate food access challenges, with staple food prices significantly above the five-year average despite recent government interventions. Although seasonal improvements are expected from October with the main harvest, conflict-affected areas will continue to face severe food access constraints, worsened by reduced humanitarian assistance and limited access for aid organisations.

[32] https://fews.net/west-africa/burkina-faso
[33] https://fews.net/west-africa/mali
[34] https://fews.net/west-africa/niger
[35] https://fews.net/west-africa/nigeria

Prevalence of Insufficient Food Consumption

In July 2025, the number of people experiencing insufficient food consumption across seven selected West African countries remained unchanged from June, at 118.4 million (**Table 13**). This marks a notable decrease compared to July 2024 (162.7 million) and July 2023 (125.7 million). Nigeria recorded a significant improvement, with nearly a 46% reduction in affected individuals compared to the previous year. In contrast, Ghana and Togo saw increases of approximately 53% and 42%, respectively, over the same period.

Table 13: Prevalence of Insufficient Food Consumption in selected West African countries (July 2025)[36]

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 ●	3.70 ↗
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00 ●	0.00 ●	41.67 ↑
Ghana	29.80	8.40	8.40	28.19	0.00 ●	52.73 ↑	68.00 ↑
Mali	19.10	13.20	13.20	69.11	0.00 ●	0.00 ●	3.94 ↗
Niger	25.90	21.40	21.40	82.63	0.00 ●	0.00 ●	25.88 ↑
Nigeria	202.80	56.40	56.40	27.81	0.00 ●	-45.98 ↓	-24.90 ↓
Togo	7.90	2.70	2.70	34.18	0.00 ●	42.11 ↑	80.00 ↑

*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.

[36] Author's construction based on WFP HungerMap Live

Maize

Figure 15: Price spreads for maize across select West African Countries[37]

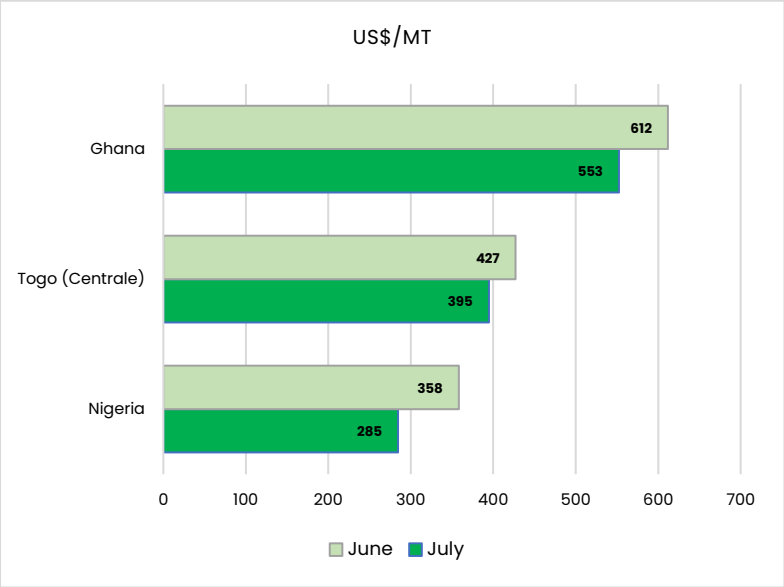


Figure 15 shows maize price trends across Ghana, Togo (Centrale), and Nigeria, highlighting a continued month-on-month decline. In **Ghana**, prices fell by 9.7% to USD 553/MT, reflecting improved domestic supply conditions. In **Nigeria**, the decline was more pronounced, with prices dropping by 20% to USD 285/MT, largely attributed to favourable harvests that have boosted market availability. Similarly, the Centrale region of **Togo** recorded a 7.6% price decrease to USD 395/MT, driven in part by the appreciation of the local currency against the US dollar. Overall, the data indicates a regional softening in prices, likely driven by improved availability of food supplies across West Africa and local currency stability.

Table 14 further highlights varied trends in maize prices in local currencies across the three selected West African countries. In **Ghana**, prices have steadily declined over the past six months, with reductions of 8.39% month-on-month, 13.20% over the past three months, and 12.2% over the past six months, suggesting easing market pressures likely driven by improved domestic supply conditions.

Nigeria shows a more pronounced decline with maize prices falling by 21.12% over the last month, 14.76% over three months, and 33.47% over six months. This sharp drop reflects strong downward pressure driven by favourable harvests and increased stock availability. **Togo** presents a mixed picture across its regions. In the Centrale region, prices remain consistently low by 5.86% (one month), 5.46% (three months), 10.00% (six months) and 18.18% (1year). In the Maritime region, a slight price increase of 1.32% was felt compared to last one month. However, the current prices are considerably low by 2.13% (three months), 9.80% (six months), and 23.08% (1 year), reflecting short-term volatility. In the Savanes region, the price appears inconsistent, but suggests high volatility, with sharp fluctuations across timeframes. Togo's market shows regional disparities, with some areas experiencing short-term declines and others reflecting long-term inflation.

Table 14: Percentage changes in maize prices in West Africa[38]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	5,782.87	-8.39 ↓	-13.20 ↓	-12.21 ↓	
Nigeria	Maize (white)	National Average, NGN/KG	435.56	-21.12 ↓	-14.76 ↓	-33.47 ↓	
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg*	225.00	-5.86 ↓	-5.46 ↓	-10.00 ↓	-18.18 ↓
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg*	230.00	1.32 ▲	-2.13 ↘	-9.80 ↓	-23.08 ↓
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg*	220.00	4.27 ▲	-3.51 ↘	7.84 ↑	-7.56 ↓

Note: Last price is for May 2025, * April 2025, and ** March 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%)

[37] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[38] Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Togo

Rice

Figure 16: Price spreads for rice across select West African Countries[39]

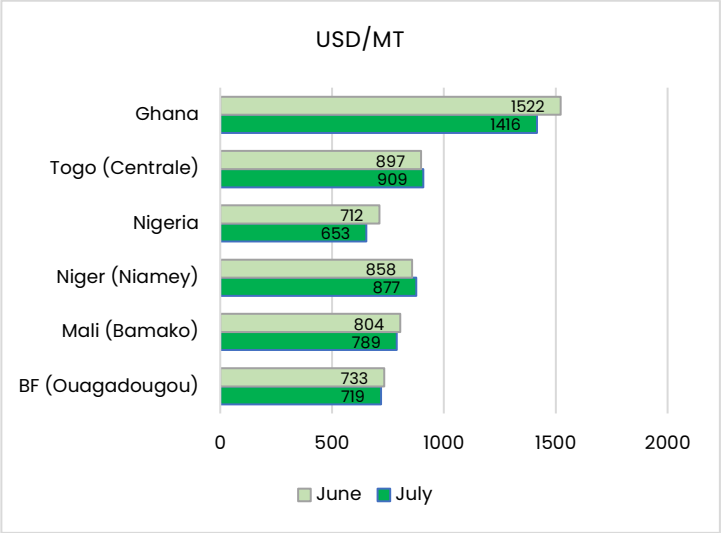


Figure 16 illustrates rice price movements in USD across six West African countries—Ghana, Togo (Centrale), Nigeria, Niger (Niamey), Mali (Bamako), and Burkina Faso (Ouagadougou) comparing June and July prices. The data reveal mixed trends across the region. **Niger (Niamey)** and **Togo (Centrale)** recorded increases of 2% and 1%, reaching USD 877/MT and USD 909/MT, respectively, due to rising demand and currency fluctuations. In contrast, **Ghana, Nigeria, Mali (Bamako), and Burkina Faso (Ouagadougou)** experienced declines ranging from 2% to 9%, with July prices falling to USD 1,416/MT, USD 653/MT, USD 789/MT, and USD 719/MT, respectively. These shifts reflect diverse market conditions and broader economic factors, contributing to a general softening of prices across the region. **Table 15** highlights a general trend of stabilising or declining rice prices in local currency terms across most markets in the observed countries over the past 1 - 12 months, with only a few exceptions. Notably, **Mali**'s Tomboctou market recorded price increases ranging from 2% to 19.05% over the past 3 - 12 months, while Bamako and Sikasso markets also saw consistent price spikes of 6.67% to 9% across one, six, and 12-month comparisons. In **Burkina Faso**, although rice prices have largely stabilised over the past 1 - 6 months, they remain elevated year-on-year, with increases ranging from 1.19% to 19.05%, indicating lingering inflationary pressure in the market.

Table 15: Percentage changes in rice prices in West Africa[40]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg	42,500.00	0.00	0.00	1.19	1.19
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	-9.09	3.09
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	56,000.00	0.00	0.00	1.82	3.70
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	0.00	19.05
Burkina Faso	Rice (imported)	Kongoussi, Wholeslae, XOF/100 kg	55,000.00	-8.33	-8.33	0.00	10.00
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	41,000.00	0.00	-10.87	-13.68	-11.83
Ghana	Rice	National Average, (GHS/MT)	14,816.67	-5.65	1.17	-11.67	
Mali	Rice	Bamako, Wholesale, XOF/100 KG	45,000.00	0.00	-6.25	-2.17	-6.25
Mali	Rice	Gao, Wholesale, XOF/100 KG	65,000.00	0.00	0.00	18.18	0.00
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	0.00	-3.70	-3.70	0.00
Mali	Rice	Mopti, Wholesale, XOF/100 KG	49,000.00	2.08	0.00	0.00	3.16
Mali	Rice	Ségou, Wholesale, XOF/100 KG	42,500.00	-7.61	-7.61	-7.61	-7.61
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	0.00	0.00	5.88	-2.17
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG	50,000.00	-9.09	2.04	11.11	19.05
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	48,000.00	6.67	0.00	9.09	6.67
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	60,000.00	0.00	0.00	0.00	0.00
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	33,000.00	-13.16	-13.16	-16.46	-24.14
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	50,000.00	4.17	0.00	0.00	0.00
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	48,000.00	6.67	-4.00	6.67	6.67
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	520.00	0.00	-16.13	-18.75	-28.77
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	480.00	2.13	-14.29	-25.00	-35.14
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	480.00	0.00	-14.29	-20.00	-27.27
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	500.00	4.17	-7.41	-13.79	-30.56
Niger	Rice (imported)	Tillaberi, Wholesale, XOF/Kg	520.00	4.00	-7.14	-13.33	-18.75
Niger	Rice (imported)	Zinder, Wholesale, XOF/Kg	500.00	-6.54	-10.71	-19.35	-34.21
Nigeria	Rice (milled)	National Average, NGN/KG	999.96	-8.89	-12.74	-17.68	
Togo	Rice (imported)	Centrale,Retail, XOF/Kg*	518.00	3.19	4.44	-2.45	7.02
Togo	Rice (imported)	Maritime,Retail, XOF/Kg*	472.00	-7.81	-11.78	-28.59	-26.13
Togo	Rice (imported)	Savanes,Retail, XOF/Kg*	475.00	-5.75	-11.38	-36.50	-36.24

Note: Last price is for May 2025, * April 2025, and ** March 2025

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

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

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

= low decrease (0-5%), = moderate decrease (5-15%), = high decrease (>15%)

Millet

Figure 17: Price spreads for millet across select West African Countries[41]

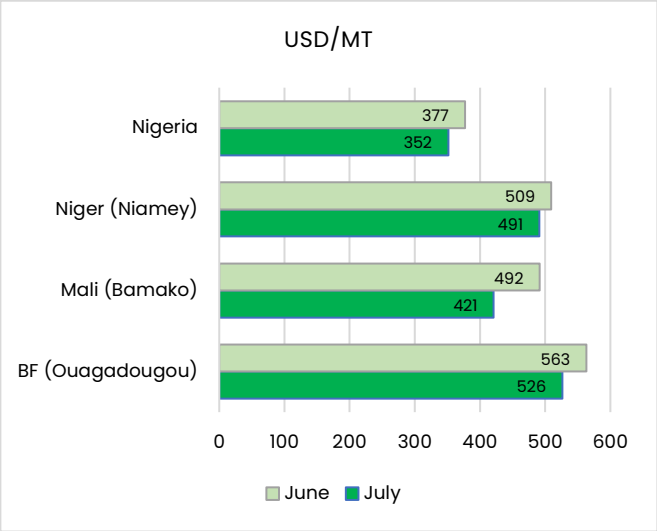


Figure 17 shows millet prices in USD across selected West African countries indicating a consistent month-on-month decline that reflects improved market conditions. In **Nigeria**, prices fell by 6.7% to USD 352/MT, **while Niger (Niamey)** recorded a 3.6% decrease to USD 491/MT. **Burkina Faso (Ouagadougou)** experienced a 6.5% drop, with prices settling at USD 526/MT. The most pronounced decline was observed in **Mali (Bamako)**, where prices fell by 14.4% to USD 421/MT, driven partly by currency appreciation against the US dollar and increased supply from recent harvests. These trends suggest a regional softening in millet prices, supported by favourable production and macroeconomic factors.

Furthermore, **Table 16** shows that millet prices in local currency have stabilised or declined compared to the past 1-12 months in the majority of the markets in these countries, with very few exceptions. For instance, **Mali's Tombouctou** market has recorded high prices compared to the past one and 12 months by 2.86%, and 5.88%. **Burkina Faso's Tenkodogo** also sees price spikes of 8.33% and 20% compared to past six and 12 months. Overall, the table reflects mild, stable, or downward trends in millet prices across most countries, with Mali and Burkina Faso being the exceptions.

Table 16: Percentage changes in millet prices in select West African Countries[42]

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	0.00	0.00	5.56	2.70
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	30,000.00	0.00	-7.69	0.00	-6.25
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	38,000.00	-5.00	-5.00	0.00	2.70
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	32,000.00	-3.03	-3.03	-1.54	14.29
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00	0.00	0.00	13.33
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	30,000.00	-7.69	-14.29	-14.29	9.09
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	30,000.00	-4.76	-11.76	0.00	-11.76
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg	39,000.00	-10.34	-8.24	8.33	20.00
Mali	Millet	Bamako, Wholesale, XOF/100 KG	24,000.00	-12.73	-22.58	-20.00	-12.73
Mali	Millet	Gao, Wholesale, XOF/100 KG	35,000.00	-6.67	-6.67	-18.60	-6.67
Mali	Millet	Kayes, Wholesale, XOF/100 KG	28,000.00	-6.67	-20.00	-15.15	-20.00
Mali	Millet	Mopti, Wholesale, XOF/100 KG	28,000.00	-3.45	-15.15	7.69	-3.45
Mali	Millet	Ségou, Wholesale, XOF/100 KG	20,000.00	-20.00	-23.08	-20.00	-23.08
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	25,000.00	-16.67	-23.08	11.11	-9.09
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	36,000.00	2.86	-5.26	2.86	5.88
Niger	Millet	Agadez, Wholesale, XOF/Kg	368.00	-8.00	-8.00	26.90	-3.16
Niger	Millet	Dosso, Wholesale, XOF/Kg	275.00	10.00	-3.51	7.84	-30.38
Niger	Millet	Maradi, Wholesale, XOF/Kg	250.00	-1.96	-7.41	-5.66	-36.71
Niger	Millet	Niamey, Wholesale, XOF/Kg	280.00	-1.75	-3.45	-6.67	-30.00
Niger	Millet	Tillaberi, Wholesale, XOF/Kg	300.00	0.00	-3.23	0.00	-31.82
Niger	Millet	Zinder, Wholesale, XOF/Kg	330.00	3.13	-2.94	10.00	-21.43
Nigeria	Millet	National Average, NGN/KG	538.21	-7.41	0.98	-18.06	

Note: Last price is for May 2025, * April 2025, and ** March 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%)

[41] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

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

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries[43]

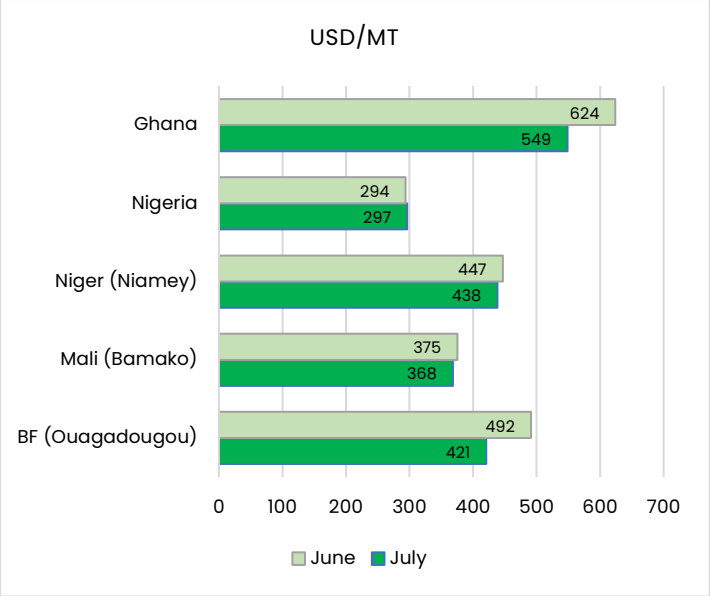


Figure 18 highlights the USD price spread of sorghum across five selected West African countries. Ghana recorded a significant 16% price drop, with prices reaching USD 549/MT, followed by Burkina Faso (Ouagadougou), marking a 14.4% price decrease month-on-month, reaching USD 421/MT. Despite Ghana's huge price slump, the country still has the highest prices for sorghum in the region. Mali and Niger experienced a 1.9% drop to USD 368/MT and USD 438/MT respectively, with Nigeria recording a modest 1% uptick to USD 297/MT.

Table 17 indicates that sorghum prices in local currencies have generally remained stable or declined across most of the selected markets over the past 1 - 6 months. However, notable exceptions are observed in Ghana and Niger's Maradi and Agadez markets, where prices have shown to be significantly higher compared to the past 1 - 6 months. In Ghana, prices have increased between 99.78% and 130.14%. Niger's Maradi and Agadez markets, prices are as high as 47.37% and 37.93% respectively, highlighting localised upward pressure in these markets.

Table 17: Percentage changes in sorghum prices in select West African countries [44]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	22,500.00	2.27 ▲	-4.26 ↘	0.00 ●	-10.00 ↓
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	25,000.00	0.00 ●	-9.09 ↓	0.00 ●	-9.09 ↓
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	33,000.00	-2.94 ↘	-5.71 ↓	3.13 ▲	0.00 ●
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	26,000.00	-3.70 ↘	-3.70 ↘	4.00 ▲	-3.70 ↘
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	-16.67 ↓	-9.09 ↓	0.00 ●	0.00 ●
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	25,000.00	0.00 ●	0.00 ●	0.00 ●	4.17 ▲
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	24,000.00	-5.88 ↓	-12.73 ↓	0.00 ●	-17.24 ↓
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	26,000.00	-8.77 ↓	-7.14 ↓	30.00 ⊗	0.00 ●
Ghana	Sorghum	National Average, (GHS/MT)	14,816.67	130.14 ⊗	114.22 ⊗	99.78 ⊗	
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	21,000.00	0.00 ●	-4.55 ↘	0.00 ●	-16.00 ↓
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	30,000.00	-3.23 ↘			-14.29 ↓
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00 ●	0.00 ●	-1.96 ↘	-19.35 ↓
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	23,000.00	-4.17 ↘	-4.17 ↘	0.00 ●	-14.81 ↓
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	20,000.00	-9.09 ↓	-9.09 ↓	0.00 ●	-20.00 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	20,000.00	-9.09 ↓	-11.11 ↓	-11.11 ↓	-20.00 ↓
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	35,000.00	0.00 ●	2.94 ▲	6.06 ↑	7.69 ↑
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	400.00	0.00 ●	11.11 ↑	37.93 ⊗	5.26 ↑
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	250.00	0.00 ●	-9.09 ↓	0.00 ●	-32.43 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	280.00	27.27 ⊗	47.37 ⊗	21.74 ⊗	-29.11 ↓
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	250.00	0.00 ●	-9.09 ↓	-10.71 ↓	-30.56 ↓
Niger	Sorghum	Tillaberi, Wholesale, XOF/Kg	295.00	-1.67 ↘	-1.67 ↘	5.36 ↑	-37.89 ↓
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	220.00	-4.35 ↘	-8.33 ↓	-21.43 ↓	-45.00 ↓
Nigeria	Sorghum (white)	National Average, NGN/KG	453.85	0.16 ▲	-6.23 ↓	-19.95 ↓	

Note: Last price is for May 2025, * April 2025, and ** March 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%)

[43] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

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

Seasonal Monitor and Cropping Conditions

Across **West Africa**, agro-climatic conditions are generally favourable this season, with conducive weather supporting the planting and establishment of cereal crops. This has contributed to a stable start to the growing season across much of the region.

In **Burkina Faso**, ongoing rains and forecasted favourable conditions could support agricultural recovery, though access remains restricted in several conflict-affected municipalities, keeping food insecurity elevated through the lean season.

In **Mali**, the agricultural season is progressing normally in secure areas; however, insecurity and flooding are limiting access to fields and inputs. As a result, national cereal production is expected to be near average despite favourable rainfall and government support. Pastoral conditions are improving with seasonal rains, but livestock production remains below average in conflict-affected zones.

In **Niger**, agricultural and pastoral conditions are improving with favourable rainfall and pasture availability, but humanitarian assistance remains severely limited due to underfunding (only 14% of the response plan funded) and restricted access, leaving many vulnerable populations without adequate support. In **Nigeria**, erratic rainfall and flooding have disrupted farming activities, especially in the north, while the ongoing lean season is intensifying food insecurity nationwide.

Food Trade Updates

East African Region

- Trade restrictions among East African Community (EAC) member states are worsening food insecurity and driving up grain prices ahead of the 2025/26 season. Uganda has imposed a USD 10/MT tonne levy on grain by-products like wheat bran and maize bran, affecting regional buyers such as Kenya. South Sudan has introduced costly fees, USD 50 per container and USD 3,000 for electronic permits, along with retesting grain imports, despite existing EAC mutual recognition agreements. These duplicative tests, including aflatoxin checks, violate regional standards and hinder trade.[45]

Figure 19 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 19: East Africa cross-border trade updates, July 2025

Kenya & Uganda

- The Government of Kenya has approved duty-free importation of 500,000 metric tonnes of Grade 1 white rice as part of a short-term response designed to support a broader goal of achieving national food security.
- Kenya sets new wheat prices, import quotas for 2025/26 to encourage local production. Under the revised structure, the minimum price for Grade 1 wheat (78 lbs and above) is approximately KES 4,750 (USD37) per 90 kg bag, while Grade 2 (75–77.9 lbs) will trade at around KES 4,650 (USD 36) per bag.
- Kenya and Uganda have signed eight new MoUs to boost trade, infrastructure and regional integration. Key agreements include cooperation in mineral exploration and institutional capacity building to combat cross-border smuggling, modernising transport and logistics infrastructure to ease the movement of goods and people, harmonising product standards and regulatory frameworks between the respective national bureaus of standards, as well as advancing innovation in agriculture and the animal industry to boost veterinary services and food security.

Tanzania

- The Government of Tanzania has introduced excise duties and an Industrial Development Levy at rates of 10 and 15% respectively, according to its Finance Act 2025 and amendments to the Excise (Management and Tariff) Act 2019.

[45] EAC partners frustrate movement of grain amid shortage

Southern Africa Region

Figure 19 provides an overview of the events and activities that have taken place across various countries in Southern Africa in the last month and are affecting the food trade in the region.

Figure 20: Southern Africa cross-border trade updates, July 2025

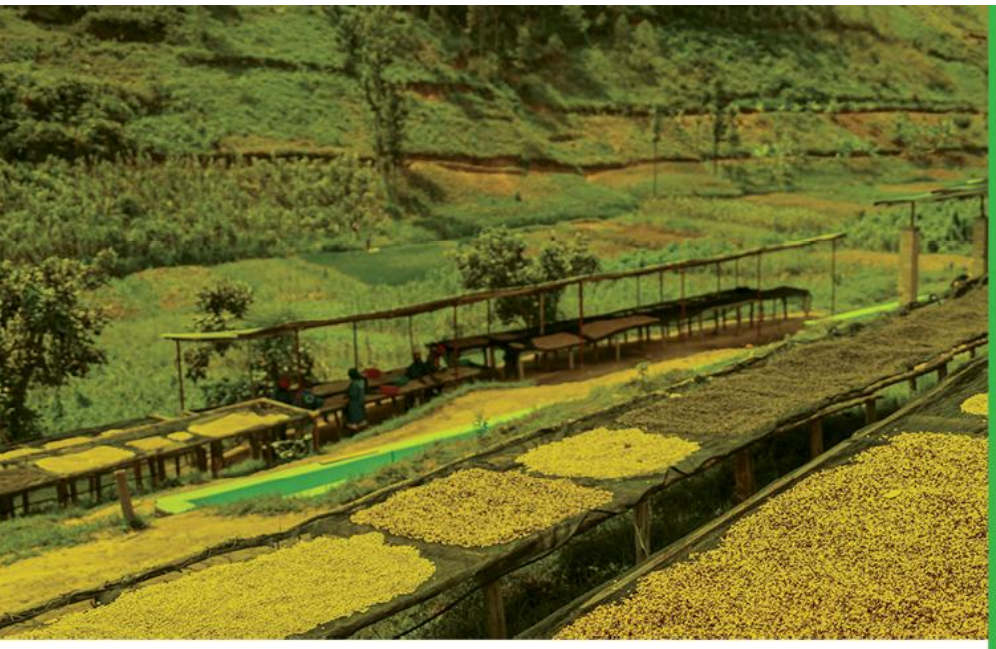
Malawi & Zambia

The Governments of Malawi and Zambia have signed a groundbreaking Mutual Recognition Agreement (MRA), underpinned by an agreed Mutual Recognition Framework (MRF). This is the first agreement of its kind in Africa, aimed at facilitating trade by eliminating redundant testing requirements between the two countries. By streamlining conformity assessments, the MRA is expected to significantly enhance trade efficiency.

This milestone forms part of a broader initiative led by the Common Market for Eastern and Southern Africa (COMESA), in collaboration with AGRA and the UK's Foreign, Commonwealth & Development Office (FCDO). The wider effort also involves Kenya, Rwanda, Uganda, and Zimbabwe.

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.

For more information,
please visit https://rfbsa.com/



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