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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 61st edition provides an overview of the food security situation and market prices across East, South, and West Africa.

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Summary

AGRA's monthly Food Security Monitor serves as a vital tool for sharing timely data with key stakeholders, supporting informed, evidence-based decisions across the agricultural sector. Below are key highlights from the August 2025 Food Security Monitor edition:

Food Commodity Prices Updates

Staple food prices across **East Africa** showed mixed but generally stable trends in August. **Maize** prices declined modestly in most countries, with **Uganda** being an exception, recording a 3.79% increase due to supply constraints. **Tanzania** experienced moderate declines (3.33%–9.38%), though prices remain 20% higher year-on-year, indicating persistent inflationary pressure. Tanzania's maize production for the current season is estimated at 7.5 million metric tonnes, with a projected surplus of 1 million metric tonnes, which could support regional food trade and help stabilise prices. **South Sudan** and **Ethiopia** saw slight monthly decreases, while **Rwanda** exhibited mixed movements. **Rice** prices remained relatively stable, with slight increases in Kenya, Tanzania, South Sudan, and Rwanda, driven by seasonal demand and supply adjustments. **Bean** prices declined in Tanzania and Uganda due to favourable harvests, while Rwanda saw a 3.9% increase, likely influenced by reduced food aid and rising domestic demand. Wheat prices rose in Kenya and Ethiopia, reflecting supply constraints, currency appreciation, and poor harvests. Overall, macroeconomic factors and harvest cycles continue to shape price dynamics across the region.

This month, **Southern Africa** experienced notable volatility in staple food prices, particularly for maize and rice. Malawi and **Mozambique** recorded sharp month-on-month maize price increases of 11% and 16%, respectively, due to limited harvests and constrained supply, while **Zambia** saw a 6% decline, making it the region's most affordable maize market. However, **Malawi** remains a major concern, with maize prices up 58% year-on-year, straining household budgets and threatening national food security amid election-related fiscal pressures. In response, ADMARC announced plans to import 200,000 metric tonnes of maize to stabilise prices and reinforce national reserves. Rice prices varied, with Zambia recording the highest at USD 2,757/MT, followed by Malawi at USD 2,276/MT, both showing monthly declines due to harvests, while Mozambique maintained stable prices at USD 923/MT. These trends underscore the need for targeted interventions to address supply gaps and protect vulnerable populations across the region.

West Africa's staple food markets reflected a mix of price trends this month. **Maize** prices declined significantly in **Nigeria, Ghana,** and **Burkina Faso**, with drops of 15.4%, 11.8%, and 11.2%, respectively, attributed to favourable harvests and improved supply. Conversely, **Niger (Niamey)** and **Mali (Bamako)** saw maize price rebounds of 5.1% and 5.7%, reversing previous declines and suggesting renewed upward pressure from conflict-related disruptions. **Millet** prices showed regional disparities, with moderate increases in Burkina Faso's Tenkodogo, Mali's Bamako, and Niger's Agadez and Niamey, raising concerns amid ongoing harvests. Rice prices remained relatively stable, though Togo's Centrale region recorded consistent increases, and Mali's Gao market saw a notable 16.67% month-on-month surge in sorghum prices.

Food Security Updates

Food insecurity remains widespread across **East Africa**, driven by drought, conflict, and economic shocks, with millions affected in Ethiopia, Kenya, and South Sudan. While seasonal harvests and rains have brought temporary relief in some areas, persistent challenges—such as low incomes, high food prices, and limited humanitarian access, continue to strain household food access. Emergency and Crisis-level conditions (IPC Phases 3 and 4) dominate, with rising food assistance needs expected through October, especially in conflict-affected and pastoral regions.

In **Southern Africa**, seasonal improvements are expected in parts of Malawi and Mozambique, but food insecurity will likely worsen through late 2025 due to poor harvests, climate shocks, and limited livelihood opportunities, especially in southern regions. Mozambique faces rising needs following cyclone damage and erratic weather, with food assistance expected to decline due to resource constraints. In contrast, Zimbabwe's favourable 2025 harvest has significantly improved food access, sustaining most rural households through the end of the year.

Acute food insecurity remains widespread across **West Africa**, driven by conflict, displacement, high food prices, and limited humanitarian access, especially in Burkina Faso, Mali, Niger, and northern Nigeria. While seasonal harvests from September to January 2026 are expected to improve food availability, insecurity, market disruptions, and underfunded humanitarian operations continue to limit access for vulnerable populations. Despite some government interventions and price stabilisation in select areas, food assistance needs remain high, particularly in conflict-affected zones and among displaced populations.

Food Trade Updates

- The Government of Ethiopia and Nigeria's Dangote Group have announced a US\$2.5 billion plan to build one of the world's largest fertiliser plants, aiming to boost agricultural productivity across Africa. Signed on 28 August 2025, the deal marks Ethiopia's strategic shift from fertiliser importer to industrial producer.
- The Tanzania Revenue Authority has launched 200 Trade Facilitation Desks nationwide to support traders, address business challenges, and promote entrepreneurship. Operational since 19 August 2025, the desks will also collect feedback to improve the business environment.
- Tanzania has completed a new US\$110 million commercial and logistics hub in Ubungo, Dar es Salaam, to strengthen regional trade for East and Southern African countries reliant on the Dar es Salaam Port. The East Africa Commercial and Logistics Centre (EALC) spans 75,000 square metres and includes over 2,000 commercial units, plus warehousing and logistics facilities. It is expected to enhance cargo handling and reduce cross-border trade costs and delays for neighbouring economies like Uganda, Rwanda, Burundi, Zambia, Malawi, Zimbabwe, and the DRC.
- The Government of Zimbabwe has reinstated its maize import ban despite production shortfalls, aiming to protect domestic producers and maximise local price gains. Meanwhile, bumper harvests in South Africa and Zambia are reshaping regional grain trade flows. The Zimbabwean government believes current supplies are sufficient to meet local demand in the short term.
- Nigeria and Benin have signed a landmark Framework for Enhanced Economic Cooperation, set to unlock over US\$4 billion in annual trade. More than a bilateral deal, the agreement marks a major step toward regional integration and a unified West African market.

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 August 2025 across 17 countries in Eastern, Southern, and Western Africa.

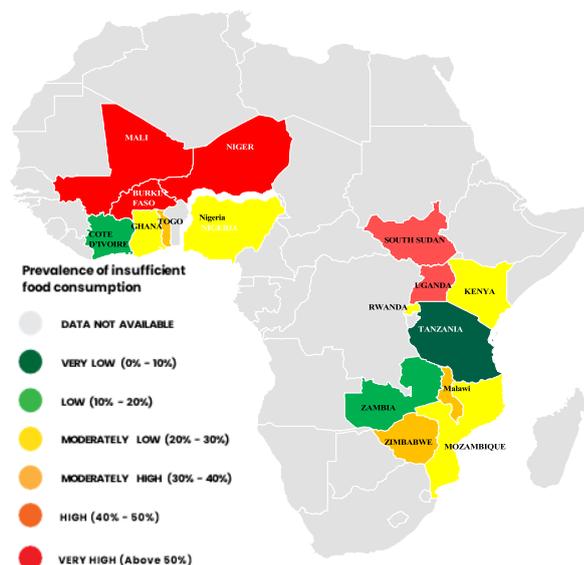
Burkina Faso, Mali, and Niger have consistently remained regional hunger hotspots over the past 14 months, with 56.6%, 69.1%, and 82.6% of their populations facing insufficient food consumption (IFC). South Sudan (44.5%) and Uganda (42.2%) also remain significantly affected. Year-on-year, IFC has declined in Nigeria (-46.2%) and Zimbabwe (-21%), but risen sharply in Ghana (+64.7%), Rwanda (+38.4%), South Sudan (+11.3%), Togo (+42.1%), and Uganda (+127.8%).

Maize and imported rice prices have generally declined over the past six months, except in Ethiopia (+14.5%), Kenya (+15.5%), South Sudan (+94.1%), and Uganda (+41.9%). Compared to last year, prices have increased in most countries, except Mali, Niger, and Togo, where they are lower than a year ago.

Table 1: IFC and Commodities Price (Local Currency) Changes
Figure 1: Hunger Hotspots Snapshot, August 2025

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	-4.56	1.52
Ethiopia			14.54	8.41
Ghana	0.00	64.71	-24.81	
Kenya	0.00	0.00	15.52	9.71
Malawi	0.00	0.00	-13.01	58.01
Mali	0.00	0.00	-5.53	-15.23
Mozambique	0.00	0.00	-30.24	
Niger	0.00	0.00	-16.57	-29.83
Nigeria	0.00	-46.23	-29.11	
Rwanda	0.00	38.46	-18.95	
South Sudan	0.00	11.38	94.15	118.45
Tanzania	0.00	0.00	-3.33	20.83
Togo	0.00	42.11	-3.99	-16.27
Uganda	0.00	127.85	41.96	68.15
Zambia	0.00	0.00	-0.93	22.72
Zimbabwe	0.00	-21.05		

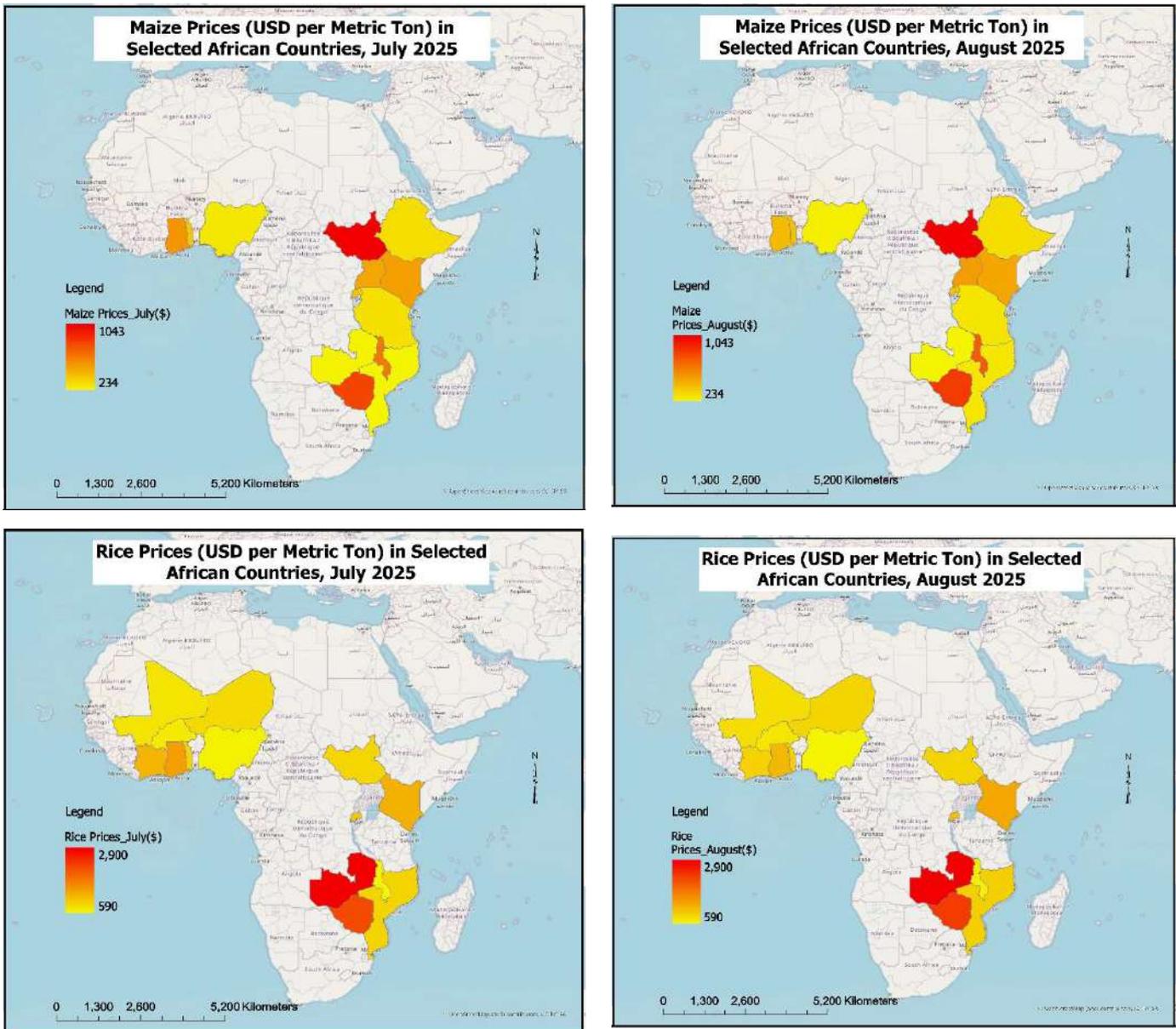
Key: ● No Change ↑ Increase ↓ Decrease



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 August 2025. Maize prices (in USD per metric tonne) were highest in South Sudan (USD 1,028/MT), followed by Zimbabwe USD 825/MT, Malawi USD 727/MT, and Uganda (USD 520/MT). Zambia and Tanzania recorded the lowest maize prices at USD 236/MT and USD 290/MT respectively. On the other hand, rice prices remained highest in Zambia (USD 2,757/MT) and Zimbabwe (USD 2,225/MT), while they were lowest in Nigeria (USD 588/MT) and Malawi (USD 636/MT).

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



Global Market Update

The FAO Food Price Index (FFPI) averaged 130.1 points in August 2025, nearly the same as the revised July figure of 130.0 points. Price declines in cereals and dairy were balanced by increases in meat, sugar, and vegetable oils. Compared to August 2024, the FFPI was up by 8.4 points, marking a 6.9% increase. In August 2025, the International Grains Council (IGC) Grain and Oilseeds Index (GOI) rose slightly by 0.5%, with soybeans increasing by 2.7%. Sub-indices for wheat and rice also registered gains of 1.6% and 3.6%, respectively (see Table 2). On a year-on-year basis, maize, soybeans, and barley prices rose by 12.2%, 5.5%, and 9.3%, while rice recorded a sharp decline of 34.6%.

Figure 3: FAO Food Price Index (FFPI)²

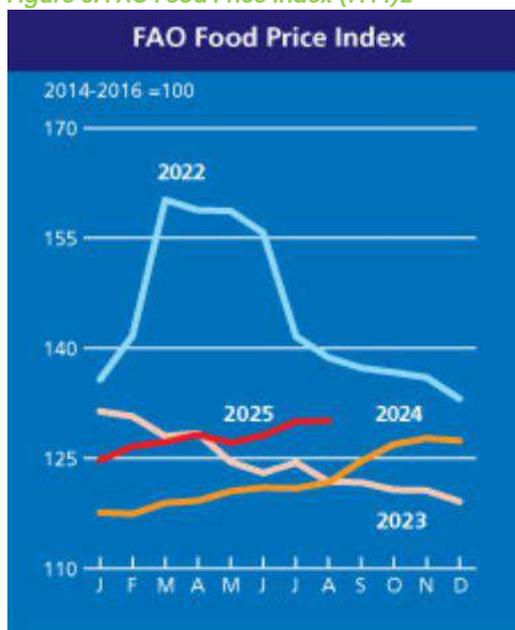


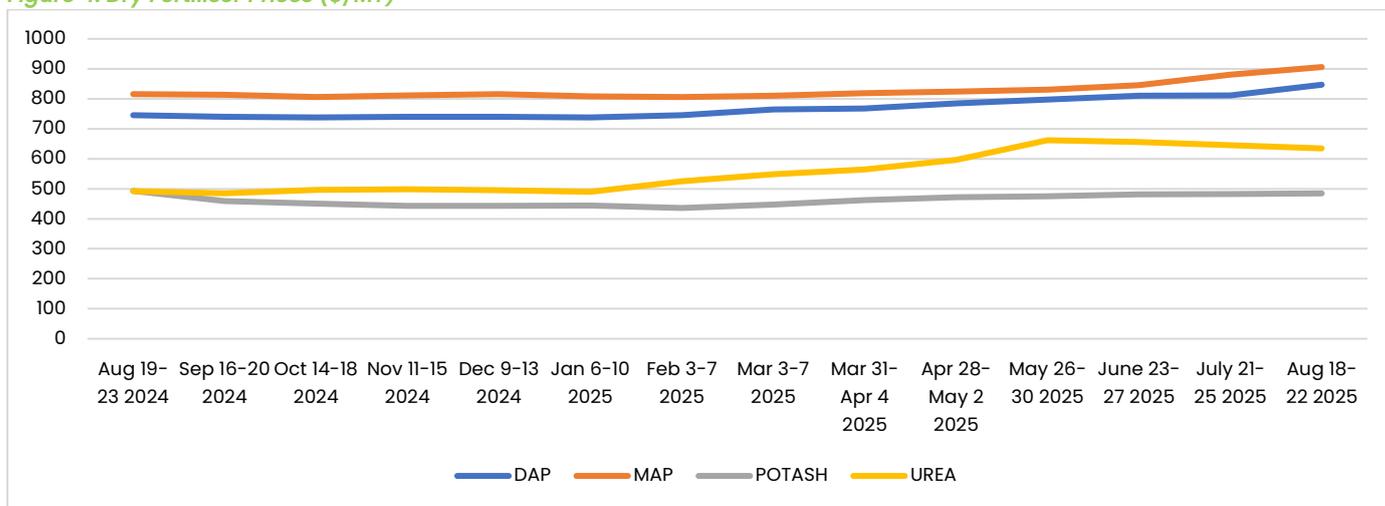
Table 2: IGC GOI Commodity Price Indices³

Jan 2000 = 100	28-Aug	% Change 1M	% Change 1Y
GOI	215.60	0.50	-
Wheat	191.78	-1.62	-0.73
Maize	222.12	-	12.25
Rice	161.37	-3.68	-34.62
Soybeans	213.89	2.76	5.58
Barley	226.15	-	9.38

Global Fertiliser Prices

In August 2025, fertiliser prices registered modest increases across most types, except for urea. DAP, MAP, and potash rose by 4.4%, 2.8%, and 0.4% respectively compared with July, while urea declined by 1.6%. Year-on-year, prices of DAP, MAP, and urea recorded significant increases of 13.7%, 11%, and 29.1% respectively, driven by seasonal demands, whereas potash registered a slight decline of 1.6%.

Figure 4: Dry Fertiliser Prices (\$/MT)



Source: Author's construction based on DTN⁴

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

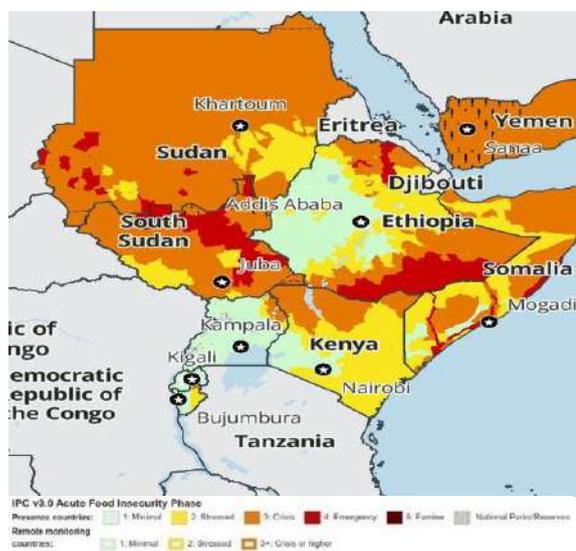
³ <https://www.igc.int/en/markets/marketinfo-go.aspx>

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, August 2025



In **Ethiopia** millions of households remain affected by drought, conflict, and economic shocks. While the 2024 *Meher* harvest and improved livestock productivity are expected to ease food insecurity in northern, southern, and eastern regions, resulting in Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes, Emergency (IPC Phase 4) conditions persist in western Afar, remote Tigray, and among displaced pastoralists in Somali and Oromia. Food assistance needs are peaking through August and, although a seasonal decline is expected from September, high needs will persist in the north, east, and south. The ongoing lean season has left many poor rural households' market-dependent with limited purchasing power. Areas of high concern include Tigray, Amhara, Oromia (East and West Hararghe), Afar (Zones 1, 2, and 4), South Omo, and Somali's

Liben and Afder zones. The upcoming *Meher* harvest in September/October is expected to improve household food access and stabilise prices nationwide.

In **Kenya**, above-average March–May 2025 rains improved food security more than expected, but gains may be short-lived owing to forecasted below-average October–December rains. In pastoral areas, poor households continue to face low incomes, as herd sizes remain below normal despite high livestock prices, limiting sales and milk availability. High maize prices and low incomes are eroding purchasing power, making it harder for pastoralists to meet basic food needs. In urban centres, food access is near normal but is expected to tighten due to weak informal sector earnings. Food assistance needs are projected to rise gradually from July through October, in line with the extended lean season.

South Sudan continues to face widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) food insecurity, with extreme hunger and acute malnutrition, especially in the Greater Upper Nile Region.⁵ Counties hosting large numbers of refugees and returnees are of particular concern. Without improved humanitarian access and scaled-up assistance, areas with households in Catastrophe (IPC Phase 5), notably along the Upper Nile–Jonglei border, face a credible risk of famine-related mortality. Nasir and Ulang counties in Upper Nile remain at risk of Famine (IPC Phase 5) through January, driven by conflict, flooding, cholera outbreaks, and delayed harvests. Although WFP reached nearly 30% of the population in these areas by mid-August, reliance on costly airdrops in Nasir underscores access challenges. If seasonal floods and insecurity worsen, famine could become the likely scenario. Food security is expected to deteriorate until October, when the rainy season ends and harvests begin.

Prevalence of Insufficient Food Consumption

In August 2025, the number of people experiencing insufficient food consumption across five selected East African countries remained unchanged from July, at 45.3 million (**Table 3**). However, this figure remains significantly higher than in August 2024 (33.7 million) and August 2023 (34 million). Rwanda, South Sudan, and Uganda recorded substantial year-on-year increases in affected populations, at 38.4%, 11.3%, and 127.8%, respectively.

⁵ <https://fews.net/east-africa/south-sudan>

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (July 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 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	11.36	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	127.85	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 Countries⁷

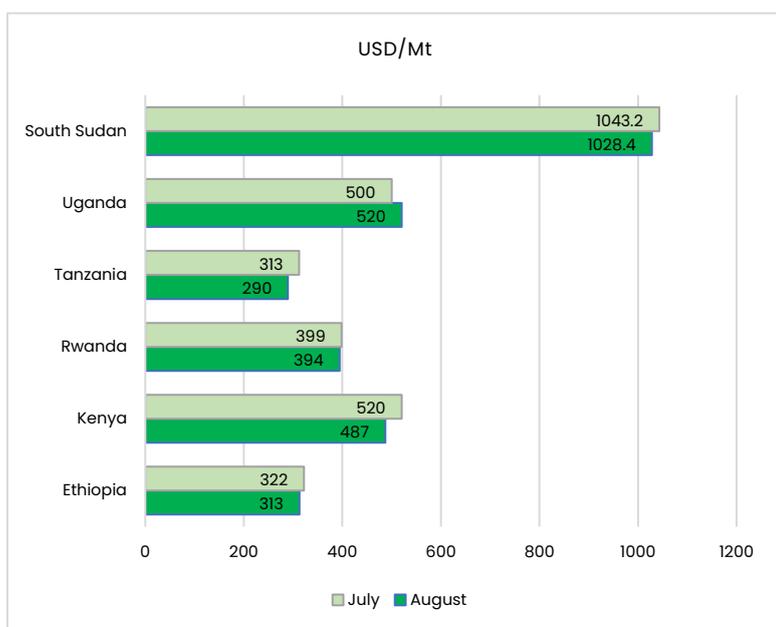


Figure 6 presents the distribution of maize prices (in USD) across six Eastern African countries, with most markets experiencing month-on-month declines from July to August 2025. Notably, **South Sudan** continues to report the highest maize prices in the region, despite a slight 1% month-on-month decrease to USD 1,028.4/MT. According to the [World Food Programme \(WFP\)](#), this reflects persistent macroeconomic instability, largely driven by significant depreciation of the national currency, which has exerted upward pressure on cereal prices.⁸ In **Kenya**, data from the Ministry of Agriculture and Livestock Development ([KAMIS](#)) indicates a slight easing of maize prices in August, following several months of sustained increases. Prices averaged USD 487/MT, representing a 6% decline from the previous month, supported by improved supply from the ongoing major harvest season. **Tanzania** recorded the lowest maize prices in the region at USD

South Sudan continues to report the highest maize prices in the region, despite a slight 1% month-on-month decrease to USD 1,028.4/MT. According to the [World Food Programme \(WFP\)](#), this reflects persistent macroeconomic instability, largely driven by significant depreciation of the national currency, which has exerted upward pressure on cereal prices.⁸ In **Kenya**, data from the Ministry of Agriculture and Livestock Development ([KAMIS](#)) indicates a slight easing of maize prices in August, following several months of sustained increases. Prices averaged USD 487/MT, representing a 6% decline from the previous month, supported by improved supply from the ongoing major harvest season. **Tanzania** recorded the lowest maize prices in the region at USD

⁶ Author’s construction based on WFP HungerMap Live

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

290/MT, following a 7% month-on-month decrease, attributed to increased availability from main season harvests. Similarly, **Ethiopia** continued to experience price declines, reaching USD 313/MT, driven by enhanced supply from recently concluded harvests. **Uganda** recorded a moderate maize price increase in USD terms by 4% to USD 520/MT largely attributed to supply constraints due to the increased demand from neighbouring South Sudan. Conversely, **Rwanda** experienced a slight 1% price decrease month-on-month to USD 394/MT, reflecting increased supply from the ongoing Season B maize harvest. Maize prices in local currency across the East African region (**Table 4**) exhibited broadly similar trends, with most countries recording modest month-on-month declines. **Uganda** was the exception, registering a moderate increase of 3.79%, attributed to domestic and regional supply constraints.

In **Tanzania**, maize prices declined moderately by 3.33% to 9.38% over the past 1–6 months. Despite this recent easing, prices remain approximately 20% higher than the same period last year. The country’s maize production for the current season is estimated at 7.5 million metric tonnes—about 4 million metric tons less than last season—indicating constrained domestic stocks amid sustained regional demand from neighbouring countries. Nonetheless, Tanzania is expected to realise a surplus of 1 million metric tonnes, which could support regional trade and contribute to price stabilisation across the region. After several months of price escalation, **Ethiopia** and **South Sudan** recorded slight month-on-month decreases of 0.07% and 1.23%, respectively. **Rwanda** also recorded modest declines of 0.77% and 18.95% compared to the past one and three months, respectively, although prices remain 3.57% higher than three months ago.

Conversely, **Kenya** recorded a marginal month-on-month decline of 6.49%, with prices reaching KES 62.54/kg. Compared with May 2025, prices were 4.44% lower, reflecting improved supply from the recent harvest. Nonetheless, prices remain elevated—9.71% and 15.52% higher than six and 12 months ago, respectively—highlighting ongoing market tightness and underlying supply challenges.

Despite these short-term adjustments, maize prices have generally trended upwards over the past 3–12 months, driven by persistent macroeconomic challenges and tightening supply conditions. Uganda experienced price increases ranging from 15.62% to 68.15%, South Sudan from 21.10% to 118.45%, and Ethiopia from 8.41% to 16.96%. These significant movements are largely attributed to depleted maize stocks and heightened regional demand, underscoring the urgency of coordinated trade and food security interventions.

Table 4: Percentage changes in maize prices in East Africa⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,446.88	-0.07 ↘	16.96 ⊗	14.54 ↑	8.41 ↑
Kenya	Maize	National Average, Retail, KES/KG	62.54	-6.49 ↓	-4.44 ↘	15.52 ⊗	9.71 ↑
Rwanda	Maize	National Average, Retail, RWF/Kg	568.63	-0.77 ↘	3.57 ▲	-18.95 ↓	
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	4,660.71	-1.23 ↘	21.10 ⊗	94.15 ⊗	118.45 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	72,500.00	-9.38 ↓	-9.38 ↓	-3.33 ↘	20.83 ⊗
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,964.00	3.79 ▲	20.90 ⊗	26.85 ⊗	29.56 ⊗
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,842.69	0.84 ▲	15.62 ⊗	41.96 ⊗	68.15 ⊗

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%)

⁹ Author’s construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Rice

Figure 7: National average price spreads for rice across select East African Countries¹⁰

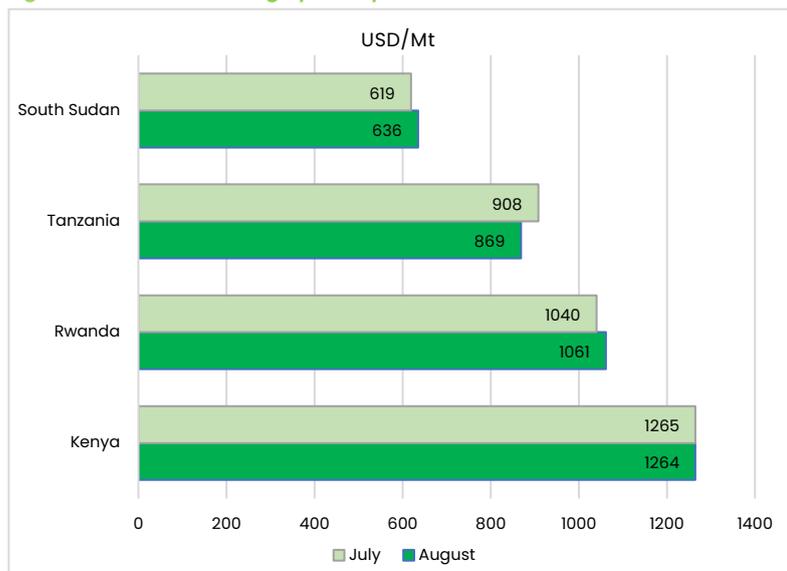


Figure 7 illustrates rice price trends (in USD) across four selected Eastern African countries in August 2025, with most markets experiencing slight month-on-month increases from July, reflecting relatively stable yet varied market conditions. **Tanzania** was a notable exception, registering a modest 4.6% price increase, to USD 869/MT, attributed to the ongoing main season harvest and currency appreciation.

Kenya recorded the highest rice price in the region at USD 1,264/MT, although this represented a marginal month-on-month decline of just 0.03%, driven by improved

supply from ongoing harvests. Conversely, **South Sudan** recorded the lowest rice price in USD 636/MT largely driven by over 50% depreciation of the local currency, although this reflected a 2.6% month-on-month increase. Similarly, **Rwanda** experienced upward pressure on rice prices in USD, with prices rising by 2% to USD 1,051/MT. These movements suggest continued supply constraints and localised market dynamics influencing price behaviour across the region.

The local currency price movements (Table 5) largely mirrored the USD-denominated trends across the region, apart from Tanzania, where USD prices were influenced by currency appreciation. **Kenya** experienced a slight month-on-month decrease of 0.08%, though prices remain 5.24% higher year-on-year, indicating gradual recovery and stable market conditions. **Tanzania** rice prices remained low by 6.45% lower than in the past one to three months, although they remained low to moderately high compared with the past six and 12 months by up to 14.47%, signifying the supply constraints currently being felt in domestic and regional markets. **Rwanda** and **South Sudan** saw modest to significant price increases, with the former's prices were 10.98% higher than six months ago, while the latter's were 46.27 per cent higher than a year ago, driven by earlier supply constraints and sustained demand.

This volatility reflects a combination of macroeconomic pressures, seasonal variability, and increasing regional demand, underscoring the need for targeted interventions to stabilise food markets and enhance affordability.

Table 5: Percentage changes in rice prices in East Africa¹¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	162.43	-0.08 ↘	8.18 ↑	2.49 ▲	5.24 ↑
Rwanda	Rice	National Average, Retail, RWF/Kg	1,530.21	2.34 ▲	3.36 ▲	10.98 ↑	
South Sudan	Rice	National Average, Retail, SSP/Kg	2,880.09	2.87 ▲	0.58 ▲	14.38 ↑	46.27 ⊗
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	217,500.00	-6.45 ↘	-6.45 ↘	2.35 ▲	14.47 ↑

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%)

¹⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹¹ Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania

Beans

Figure 8: National average price spreads for beans across select East African Countries¹²

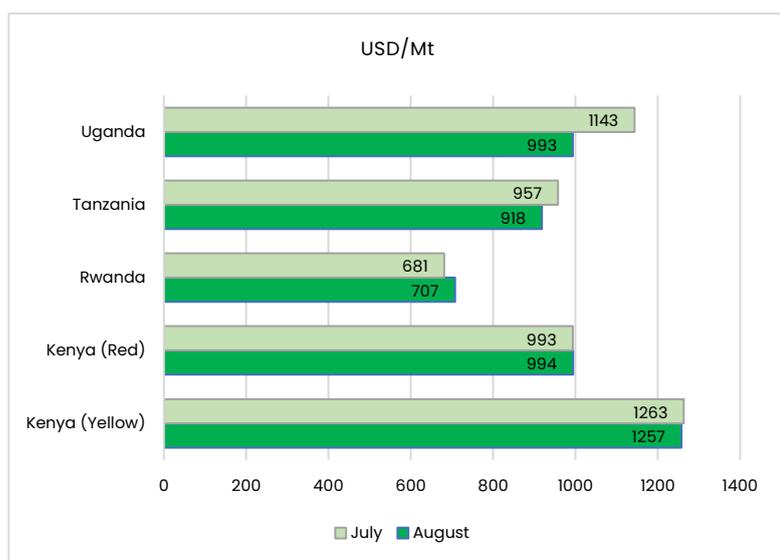


Figure 8 illustrates bean price trends (in USD) across four selected East African countries, revealing notable shifts influenced by seasonal harvests and macroeconomic factors. In **Tanzania**, prices declined moderately by 4.1% reaching USD918/MT, while **Uganda** recorded a significant price decline of 13.1% to USD993/MT, driven by ongoing favourable green harvests and effective stock management since the second quarter of the year. In **Kenya**, bean prices remained relatively stable month-on-month across the two major varieties. Yellow-Green beans declined slightly by

0.5%, while Red Haricot beans registered a marginal increase of 0.1%, reflecting nuanced market dynamics despite ongoing harvests. In contrast, **Rwanda** experienced a 3.9% increase in bean prices, despite the current Season C harvest. This upward pressure is likely the result of supply constraints amid rising demand, exacerbated by the World Food Programme’s reduction in food aid earlier in May. As the harvest season concludes, this trend raises concerns for vulnerable populations particularly women, children, and refugees who are most affected by food price volatility.

As shown in **Table 6**, bean prices across the region have generally recorded slight to moderate declines over the past 1–12 months in local currency terms. In **Kenya**, where prices had remained elevated earlier in the year, both Yellow-Green and Red Haricot varieties recorded notable 3 month declines of 14.82% and 8.06%, respectively. Month-on-month, prices have remained relatively stable, with slight increases of 0.52% and 0.04%. Compared with the same period last year, prices are lower by 8.75% and 2.87%, reflecting improved supply conditions following the recent harvest. **Tanzania’s** bean prices have remained moderately low, with declines of 14.81%, 15.60%, and 8% compared with the past one, six, and 12 months, respectively, indicating sustained supply availability. In **Rwanda**, prices increased slightly by 4.24% and 4.95% over the past one and six months, respectively, despite the ongoing harvest season. However, prices were 4.8% lower than three months ago, suggesting some short-term relief. **Uganda’s** bean prices remain significantly lower across the 1–12-month period, with declines ranging from 2.98% to 14.17%, largely driven by favourable green harvests and improved market supply.

Table 6: Percentage changes in bean prices in East Africa¹³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	161.52	-0.52 ▾	-14.82 ▾	-13.92 ▾	-8.75 ▾
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	127.70	0.04 ▲	-8.06 ▾	-9.36 ▾	-2.87 ▾
Rwanda	Beans	National Average, Retail, RWF/Kg	1,019.82	4.24 ▲	-4.80 ▾	4.95 ▲	
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	230,000.00	-6.12 ▾	-14.81 ▾	-15.60 ▾	-8.00 ▾
Uganda	Beans	National Average, Retail, UGX/Kg*	3,517.31	-13.72 ▾	-14.17 ▾	-2.98 ▾	-6.81 ▾

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%)

¹² These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹³ Author’s construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

Wheat

Figure 9: National average price spreads for wheat across select East African Countries

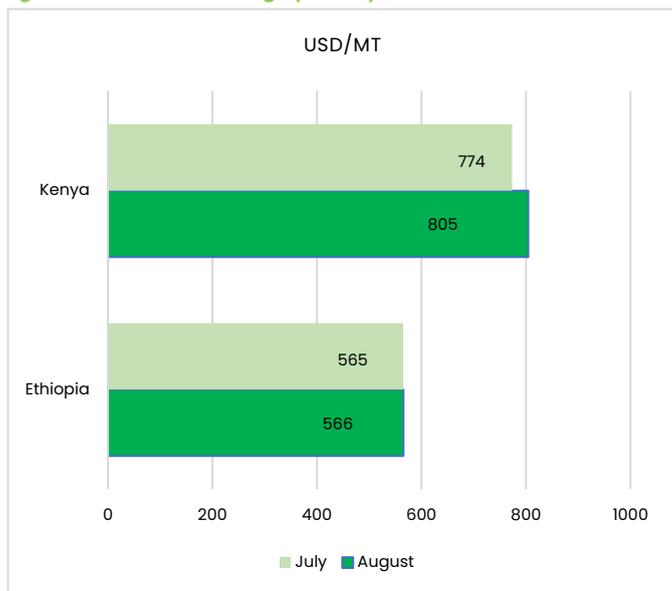


Figure 9 presents wheat price trends (in USD) for two selected East African countries—Kenya and Ethiopia. In **Kenya**, wheat prices increased by 4% increase to USD 805/MT, primarily attributed to increased supply constraints. Similarly, **Ethiopia** also recorded a slight price increase of 0.2%, with prices rising to USD 566/MT. Poor Belg season harvests and rising regional demand¹⁴ have contributed to upward pressure on wheat prices in Ethiopia, reflecting broader market challenges that may persist in the near term.

Similar patterns are reflected in local currency terms (Table 7). In Kenya, wheat prices increased moderately by 3.93% month-on-month and remained 5.69% higher than over the past 6 months, although they were 2.79% lower than a year ago. In Ethiopia, prices rose by 3.00% month-on-month and remained consistently higher across all reference periods—up by 10.59%, 11.28%, and 9% compared with the past three, six, and 12 months, respectively. These increases are driven by strong regional demand, seasonal supply limitations, and broader macroeconomic constraints.

Similar patterns are reflected in local currency terms (Table 7). In Kenya, wheat prices increased moderately by 3.93% month-on-month and remained 5.69% higher than over the past 6 months, although they were 2.79% lower than a year ago. In Ethiopia, prices rose by 3.00% month-on-month and remained consistently higher across all reference periods—up by 10.59%, 11.28%, and 9% compared with the past three, six, and 12 months, 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 Africa¹⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,040.63	3.00 ▲	10.59 ↑	11.28 ↑	9.00 ↑
Kenya	Wheat	National Average, Retail, KES/KG	103.35	3.93 ▲	-0.62 ▾	5.69 ↑	-2.79 ▾

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**, month-on-month prices of all types of fertilisers have declined in the range of 3.96% and 6.45% as the country finalised the harvest season. Over the medium term, DAP and NPK prices have increased, but all three types remain lower year-on-year in the range of 2.67% to 30.68% despite the global surge in fertiliser prices during the second quarter of the year suggesting improved supply and possible subsidy effects. In **Rwanda**, fertiliser prices in USD terms have remained elevated across all reference periods. NPK prices rose by 6.94%, 9.49%, and 7.77% over the past one, three, and six months, respectively, while Urea prices increased by 2.6%, 3.48%, and 3.5% over the same periods. These sustained price levels reflect persistent global supply chain constraints, rising production and transportation costs, and currency fluctuations, all of which continue to impact fertiliser affordability and access for farmers.

¹⁵ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Table 8: Percentage changes in fertilizer prices in East Africa¹⁶

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	73.15	-6.45 ↓	0.66 ▲	-9.93 ↓	-16.44 ↓
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	110.73	-3.96 ↘	-3.50 ↘	1.72 ▲	-30.68 ↓
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	96.00	-4.46 ↘	-8.28 ↓	0.50 ▲	-2.67 ↘
Rwanda	NPK	National Average USD/50kg	798.43	6.94 ↑	9.49 ↑	7.77 ↑	
Rwanda	Urea	National Average USD/50kg	766.79	2.61 ▲	3.48 ▲	3.50 ▲	

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 Conditions¹⁷

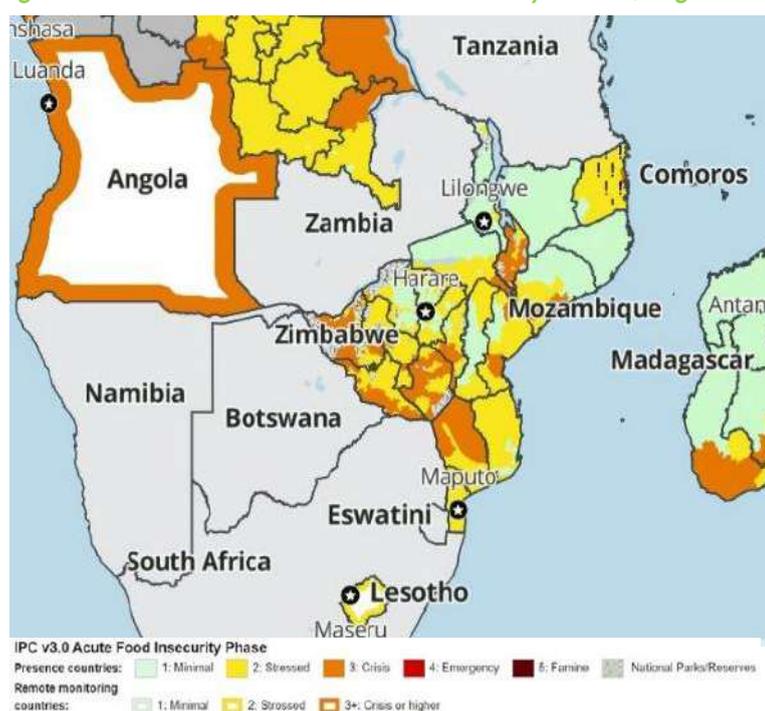
Cereal crop conditions across **East Africa** are mixed, shaped by varied rainfall performance and seasonal dynamics. In **Ethiopia**, Meher season cereals are progressing toward harvest under generally favourable conditions, though flooding and landslides in the northwest and centre-east have raised concerns. In **Kenya**, long rains maize harvesting in eastern bimodal areas concluded with mixed outcomes – favourable along the coast but poor in the east and northeast due to dry spells – while major western regions continue crop development under good conditions. **Uganda** has completed or is finalizing first-season cereal harvests, with second-season maize planting underway; conditions are favourable in central and southern bimodal zones, and improving in the unimodal north following August rains, despite flooding in the east. In **South Sudan**, first-season maize and sorghum harvests were completed in August with generally positive results, although localized rainfall deficits may reduce yields; second-season planting is ongoing. Meanwhile, **Tanzania** finalized Masika season cereal harvesting in bimodal areas under favourable conditions, and land preparation for the Vuli season is underway ahead of September planting. Finally, land preparation for Season A maize is underway in **Rwanda** and **Burundi** with planting beginning in September.

¹⁶ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

¹⁷ Crop Monitor EW No. 107 – August 2025: [EarlyWarning_CropMonitor_202508.pdf](#)

Southern Africa Food Security Update

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



Food security is expected to improve seasonally in northern and central **Malawi** through late 2025, supported by households consuming their own below-average harvests. In contrast, southern Malawi is likely to see only brief stabilisation, with poor households facing worsening conditions due to limited agricultural labour opportunities and weak crop production. Overall, food insecurity is projected to deteriorate through December 2025, with rising needs concentrated mainly in the south.

In **Mozambique**, Crisis-level food insecurity (IPC Phase 3) persists in conflict-affected areas of Cabo Delgado, where escalating attacks by non-state armed groups have displaced over 56,200 people.¹⁸ The insurgency's shift to mobile tactics is expected

to expand food insecurity through January 2026. In southern and central Mozambique, poor households are also facing Crisis outcomes due to two consecutive years of poor harvests, worsened by El Niño-induced drought. As food stocks dwindle and purchasing power remains low, some districts are projected to deteriorate from Stressed (IPC Phase 2) to Crisis (IPC Phase 3). Humanitarian assistance reached 78,500 people in July, split between conflict and cyclone-affected populations. However, food aid in conflict zones covered only 40% of caloric needs, and WFP Mozambique faces funding shortfalls, with cash-based transfers expected to end by November.

In **Zimbabwe**, a favourable 2025 cereal harvest has enabled most rural households in both surplus and deficit-producing areas to rely on their own food stocks. FEWS NET projects that this will sustain food access through to the end of the year, marking a significant improvement in food security conditions compared with the same period last year.

Prevalence of Insufficient Food Consumption

In August 2025, the number of people facing insufficient food consumption across Malawi, Mozambique, Zambia, and Zimbabwe remained unchanged from July, at 22.2 million (**Table 9**). Year-on-year, this represents an improvement of 1.2 million fewer affected individuals, with Zimbabwe recording a 21% decline. However, compared with two years ago, Malawi experienced a significant increase of approximately 51%, while Zambia recorded a 23.2% reduction in the affected population.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (August 2025)¹⁹

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	-21.05	12.50	↑

¹⁸ <https://fews.net/southern-africa/mozambique/food-security-outlook-update/august-2025>

¹⁹ Author's construction based on HungerMap

*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 Countries²⁰

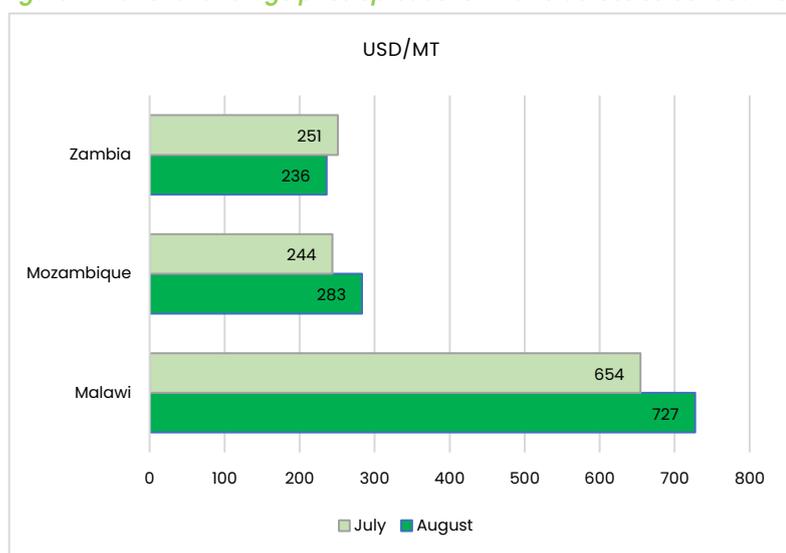


Figure 11 shows contrasting movements in maize prices (in USD) in three select Southern Africa countries. **Malawi** recorded the highest prices at USD 727/MT, an 11% month-on-month increase. A similar upward trend was observed in **Mozambique**, where prices rose by 16% to USD 283/MT. In both countries, the price surges were primarily driven by limited supply conditions resulting from constrained harvests. In contrast, **Zambia** recorded a 6% month-on-month decline in maize prices, falling to USD 236/MT. This decrease is attributed to improved supply

availability, positioning Zambia as the lowest-priced maize market among the monitored East and Southern African countries.

As shown in **Table 10**, maize prices in local currency follow a similar trend to those in USD. In **Zambia**, prices remained moderately low compared with the past one to six months, with declines ranging from 0.93% to 13.31%. However, they were still significantly higher year-on-year, up by 22.72%, due to prolonged supply constraints. Conversely, Malawi and **Mozambique** experienced notable month-on-month price surges of 11.79% and 16.14%, respectively. Over the past three months, prices in both countries remained significantly elevated, rising by 43.54% in Malawi and 37.10% in Mozambique. Mozambique's prices, however, were 30.24% lower than six months ago, indicating some volatility. In contrast, **Malawi's** prices remain substantially elevated up by 58% compared with the same period last year raising serious concerns among scholars and economists²¹. The sharp increase has strained household budgets and poses a growing threat to national food security, particularly in a context already burdened by election-related fiscal pressures. In response to mounting public concern, the Agricultural Development and Marketing Corporation (ADMARC) of Malawi announced plans to import 200,000 metric tonnes of maize to bolster national food reserves and stabilise market prices, especially during periods of supply disruptions and heightened price volatility.²²

²⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

²¹ Malawi Faces Food Crisis [Malawi faces food crisis as maize prices soar](https://www.millingmiddleeast.com/malawi-faces-food-crisis-as-maize-prices-soar/) - Milling Middle East & Africa Magazine - No.1 Grains Industry Magazine & Website for Africa & the Middle East

²² [247Malawi https://www.247malawi.com/admarc-to-import-200000-metric-tonse-of-maize/](https://www.247malawi.com/admarc-to-import-200000-metric-tonse-of-maize/)

Table 10: Percentage changes in maize prices in Southern Africa²³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,257.67	11.79 ↑	43.54 ×	-13.01 ↓	58.01 ×
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	17.89	16.14 ×	37.10 ×	-30.24 ↓	
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	65.24	-3.26 ↘	-13.31 ↓	-0.93 ↘	22.72 ×

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

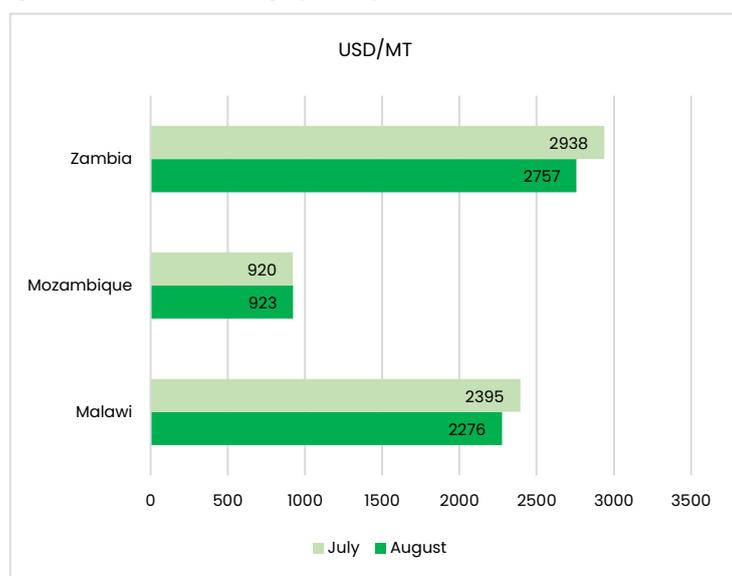


Figure 12 shows rice prices (in USD) for Zambia, Mozambique, and Malawi. **Zambia** recorded the highest rice price among the selected countries at USD 2,757/MT, reflecting a 6.2% month-on-month decline due to increased supply from the ongoing harvest season. Similarly, **Malawi** recorded a 5% decline during the same period, with prices falling to USD 2,276/MT the second highest in the group. **Mozambique** maintained the lowest rice price at USD 923/MT, with prices remaining stable month-on-month supported by favourable harvest conditions that continue to sustain supply levels. As illustrated in **Table 11**, rice prices in local currency terms show varied trends across the region, with all three countries,

Zambia, Malawi, and Mozambique, recording moderate declines or relative stability on a month-on-month basis. **Zambia** recorded consistent declines across all timeframes (1–12 months), ranging from 1.99% to 38.20%, reflecting the positive impact of bumper harvests on price stabilisation. In **Malawi**, prices declined by 4.35%, yet remained elevated over the past three to –six months up by 11.74% and 30.71% and were significantly higher year-on-year by 58%, indicating ongoing supply challenges. **Mozambique’s** rice prices were slightly higher compared with the past one and six months by 0.24% and 84.12%, respectively, though they are 15.70% lower than three months ago. This suggests easing supply constraints following favourable harvests, though volatility remains. These trends highlight the complex interplay between seasonal harvests, regional supply dynamics, and macroeconomic conditions affecting rice affordability across Southern Africa.

Table 11: Percentage changes in rice prices in Southern Africa²⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	3,937.50	-4.35 ↘	11.74 ↑	30.71 ×	
Mozambique	Rice (imported)	National Average, MZN/Kg	58.31	0.24 ▲	-15.70 ↓	84.12 ×	
Zambia	Rice (imported)	National Average, Retail, Kwacha/KG	5.58	-1.99 ↘	-38.20 ↓	-35.43 ↓	-33.92 ↓

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%)

²³ Author’s construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia and Zimbabwe

²⁴ Author’s construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

Beans

Figure 13: National average price spreads for beans across select Southern African Countries

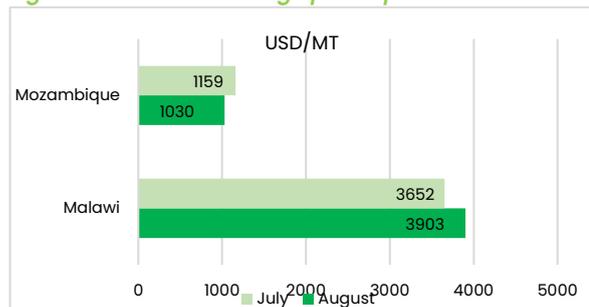


Figure 13 illustrates bean prices in USD/MT per across selected Southern African countries, revealing divergent market trends. **Mozambique** recorded a sustained decline in bean prices over the past three consecutive months, with the latest drop bringing prices to USD 1,030/MT, an 11% month-on-month decrease. This downward trend driven by improved supply conditions, marks the third consecutive month of notable decline. Since May 2025, bean prices have

fallen by a cumulative 36%, reflecting the positive impact of seasonal harvests and enhanced market availability. In contrast, **Malawi** recorded a sustained increase in bean prices over the past three consecutive months, with the latest uptick bringing prices to USD 3,903/MT, a 7% month-on-month increase. This sharp rise is attributed to supply constraints stemming from poor harvests, which have tightened market availability. Since May 2025, bean prices have increased by 25.46%, underscoring the impact of poor harvests and supply constraints.

Similarly, **Table 12** further illustrates the local bean prices in these countries, with **Malawi** experiencing increases. Over the past month, bean prices increased by 6.86% and soybeans by 0.8%. In contrast, **Mozambique** has maintained consistently low bean prices, with reductions of 11.17% and 32.04% over the past one to 3 months– months. This reflects a stable and well-supplied market, supported by favourable harvest conditions. Given the ongoing inflationary pressures in Malawi, these contrasting trends underscore the need for targeted cross-border trade facilitation between the two countries to help ease price pressures and improve food affordability in Malawi.

Table 12: Percentage changes in bean prices in Southern Africa²⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %
Malawi	Beans	National Average, MWK/Kg	6,750.00	6.86 ↑	32.07 ⊗	44.39 ⊗
Malawi	Soyabeans	National Average, MWK/Kg	2,655.56	0.84 ▲	32.78 ⊗	8.07 ↑
Mozambique	Beans	National Average, MZN/Kg	65.07	-11.17 ↓	-32.04 ↓	

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%),
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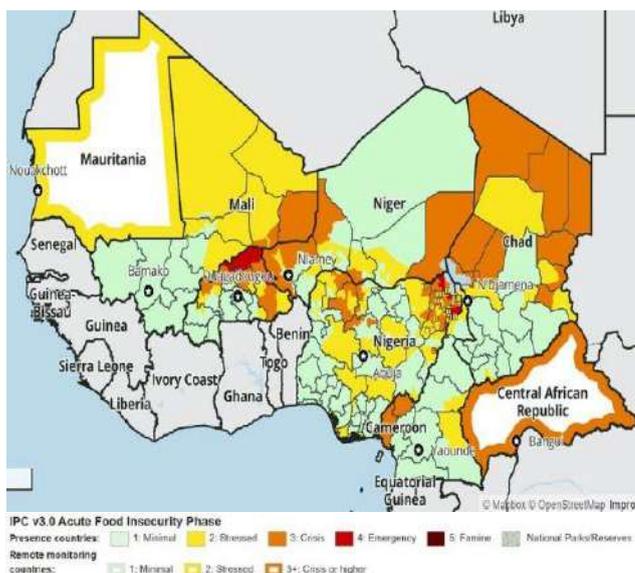
Seasonal Monitor and Cropping Conditions

Across **Southern Africa**, main season cereals are currently out of season, with planting for the 2025/26 cycle expected to begin in October. In **Zambia**, reduced water availability for irrigation and a delayed summer harvest have led to a 45 percent reduction in planted area, which is expected to result in a decline in wheat production; however, overall yields remain favourable. In contrast, Zimbabwe is expected to achieve above-average wheat production, driven by an increase in planted area. In **Malawi**, an early start to the 2024/25 rainy season in southern provinces contrasted with delays in central and northern regions, contributing to a below-average national harvest. As a result, 2025 harvests in districts such as Neno, Mwanza, Blantyre, Phalombe, Mulanje, and Thyolo are estimated to be 65–75% below the five-year average. Food stocks are expected to deplete earlier than usual, leaving poor households vulnerable to reduced income and elevated food prices. In **Zimbabwe**, La Niña is expected to bring average to above-average rainfall during the October 2025 to March 2026 rainy season, likely replenishing water resources, supporting normal to above-normal crop development, and boosting agricultural labour opportunities. Additionally, an increase in planted area is expected to result in above-average wheat production.

²⁵ 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, August 2025



During the lean season, poor host households, IDPs, and returnees in insecure areas of **Burkina Faso** such as Djibo, Arbinda, Sebba, Sollé, Mani, Kantchari, and Diapaga are facing food consumption deficits and are resorting to negative coping strategies, such as reducing meal size and frequency. Limited income from informal activities and remittances remains insufficient to meet food needs, despite improved market supplies from recent convoys. While market supplies have improved in major centres, prices remain 15–30% above the five-year average, with sharper increases in insecure areas, up to 98% for sorghum in Sebba and 96% for millet in Gayéri. Prices are expected to decline slightly through January 2026 with the harvest; however, insecurity, high transport costs, and restricted cross-border flows are likely to keep

them above seasonal norms. Humanitarian access continues to be a major challenge due to insecurity, limited funding (only 20% of the 2025 HRP funded by mid-August), and logistical constraints. While food access is expected to improve with the harvest from September to January, continued market access and humanitarian aid will be critical for vulnerable populations in insecure areas.

In **Mali**, insecurity and conflict continue to drive acute food insecurity, particularly in central and northern regions like Ménaka and Kidal, where violence disrupts livelihoods and humanitarian access.²⁶ The lean season is exacerbated by reduced income, high food prices, and market supply challenges. While harvests from October to January 2026 are expected to improve food access in southern agricultural zones, northern areas will remain highly food insecure without sustained assistance. Market supplies are generally adequate, with improvements in Timbuktu and Gao due to river transport. However, insecurity and poor infrastructure are causing sharp price increases, up to 43% in Ménaka and 40% in Kidal, limiting access for poor households. Food assistance is being scaled up during the lean season, targeting 1.4 million people monthly through September. However, underfunding, logistical delays, and access constraints are limiting the reach and effectiveness of humanitarian efforts.

Acute food insecurity in **Niger** is expected to worsen through September due to conflict, flooding, and displacement, before improving seasonally from October to January 2026 with increased food availability and income from harvests.²⁷ The regions most affected include Tillabéry, Diffa, Maradi, Tahoua, and recently Dosso, where insecurity continues to disrupt agricultural production, market access, and livelihoods. Market supplies are generally stable, supported by merchant stocks and imports. The government, through OPVN and CCA, has launched subsidised cereal sales (60,000 tonnes) and targeted free distributions (14,300 tonnes to 143,000 households). Despite these measures, insecurity has led to market closures and poor supply in several areas. In functioning markets, July prices for millet, sorghum, maize, and rice were 25–34% lower than last year but remained in line with five-year averages. Humanitarian food assistance has been scaled down due to funding constraints, reducing the target population from 1.1 million to 347,525 during the lean season. Delivery challenges, linked to insecurity, high costs, and logistical delays, are limiting the reach of planned interventions.

Acute food insecurity in **Nigeria** is worsening during the lean season through September, with seasonal improvement expected from October as harvests commence.²⁸ However, conflict-affected northern areas will continue to face Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) outcomes, especially in

²⁶ <https://fews.net/west-africa/mali/key-message-update/august-2025>

²⁷ <https://fews.net/west-africa/niger/key-message-update/august-2025>

²⁸ <https://fews.net/west-africa/nigeria/key-message-update/august-2025>

inaccessible parts of Borno State such as Abadam, Guzamala, Marte, and Bama, where insurgent attacks severely limit food production and livelihoods. In the Northwest, banditry in Katsina, Sokoto, and Zamfara is widening food consumption gaps. Flooding across 22 states, as reported by NEMA, is exacerbating displacement, crop loss, and reduced access to food and income. Although inflation has eased slightly, high energy and transport costs continue to drive up food prices. Government import waivers on maize, rice, and sorghum have led to minimal declines in staple prices, but households in conflict-affected and flood-prone areas remain at risk of extreme food insecurity.

Prevalence of Insufficient Food Consumption

In August 2025, the number of people facing insufficient food consumption across seven selected West African countries remained steady at 118.4 million, unchanged from July (**Table 13**). However, this represents a notable improvement compared with August 2024 (162.8 million) and August 2023 (125.7 million). Nigeria recorded the most significant progress, with a 46.2% reduction in affected individuals' year-on-year. In contrast, Ghana and Togo experienced sharp increases of approximately 64.7% and 42.1%, respectively.

Table 13: Prevalence of Insufficient Food Consumption in selected West African countries (August 2025)²⁹

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	64.71	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	-46.23	-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.

²⁹ Author's construction based on WFP HungerMap Live

Maize

Figure 15: Price spreads for maize across select West African Countries³⁰

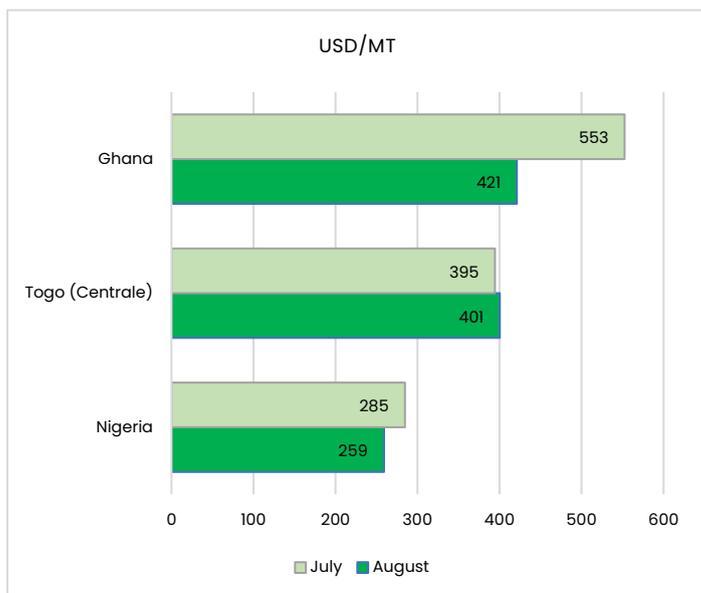


Figure 15 illustrates maize price trends in USD across selected West African countries, revealing divergent market trends. **Ghana** has registered a notable 23% month-on-month decline in maize prices, reaching USD 421/MT, driven by slight currency depreciation and the ongoing harvest of the 2025 main season crop, which is expected to conclude in September.³¹

Nigeria has recorded a sustained decline in maize prices over the past three consecutive months, with the latest drop bringing prices to USD 259/MT, a 9% month-on-month decrease. This downward trend is attributed to improved supply conditions following favourable main season harvests in bimodal rainfall zones, as well as the government's

tariff moratorium issued last year. The latter has facilitated increased imports, contributing to oversupply and resulting in losses of up to ₦30,000 per bag for traders.³² who purchased and stored maize in December 2024, anticipating a price surge during the lean season. **Togo** recorded a slight 1.5% price increase to USD 401/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 three selected West African countries. In **Ghana**, prices have steadily declined over the past six months, falling by 14.71% month-on-month, 26.62% over three months, and 24.81% over six months, indicating easing market pressures likely driven by improved domestic supply. **Nigeria** has experienced even sharper declines, with prices dropping by 8.5% in the past month, 41% over three months, and 29.11% over six months, reflecting strong downward pressure from favourable harvests and increased stock availability. **Togo's** maize market shows regional disparities, with Centrale maintaining consistently low prices and Maritime experiencing short-term volatility despite long-term declines. In Savanes, price trends are erratic, reflecting high market instability across timeframes.

Table 14: Percentage changes in maize prices in West Africa³³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	4,932.28	-14.71 ↓	-26.62 ↓	-24.81 ↓	
Nigeria	Maize (white)	National Average, NGN/KG	398.54	-8.50 ↓	-41.00 ↓	-29.11 ↓	
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%)

³⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

³¹ GIEWS Country Brief: Ghana 19-August-2025 <https://reliefweb.int/report/ghana/giews-country-brief-ghana-19-august-2025>

³² Maize Price Crash Hits Food Hoarders Hard As Market Drops By Over 50% <https://247ureports.com/2025/08/maize-price-crash-hits-food-hoarders-hard-as-market-drops-by-over-50/>

³³ 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 Countries³⁴

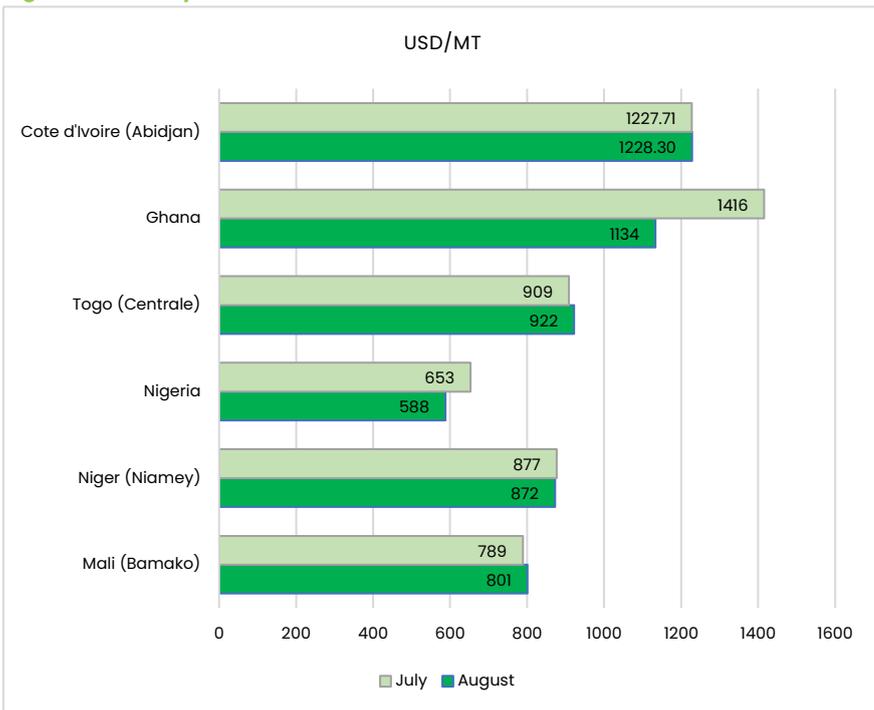


Figure 16 illustrates rice price movements in USD across six West African countries; Ghana, Togo (Centrale), Nigeria, Niger (Niamey), Mali (Bamako), and Burkina Faso (Ouagadougou) comparing July and August prices. The data reveal mixed trends across the region. **Togo (Centrale), Mali (Bamako) and Cote d'Ivoire (Abidjan)** recorded slight price increases ranging from 0.05% to 1% reaching USD 922/MT, USD801/MT and USD 1,228.3/MT, respectively, due to currency fluctuations.

In contrast, **Ghana, Nigeria and Niger (Niamey)** experienced declines ranging from 1% to 25%, with August prices falling to USD 1,134/MT (25%

drop), USD 588/MT (11% drop), and USD 872/MT (1% drop), respectively. These movements reflect varying market dynamics and broader economic factors, contributing to an overall softening of prices across the region. **Table 15** reveals a general trend of stabilising or declining rice prices in local currency terms across most observed markets over the past 1 – 12 months, with only a few exceptions. Notably, **Togo's** Centrale market recorded price increases of 3.19%, 4.44%, and 7.02% over the past one, three, and 12 months, respectively. However, current prices remain 2.45% lower compared to six months ago, indicating mixed short and long-term dynamics. While rice prices in **Mali's** Gao market have remained stable over the past one to three months, they are still 18.18% higher than six months ago, likely due to lingering supply constraints and elevated transport costs. Despite this, prices are 7.14% lower than a year ago, reflecting broader regional adjustments and improved availability from recent harvests.

³⁴ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

Table 15: Percentage changes in rice prices in West Africa³⁵

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 ●	14.86 ↑	0.00 ●	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	48,000.00	-14.29 ↓	-14.29 ↓	-12.73 ↓	-11.11 ↓
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	-10.00 ↓	-10.00 ↓	-10.00 ↓	7.14 ↑
Burkina Faso	Rice (imported)	Kongoussi, Wholesale, XOF/100 kg	55,000.00	0.00 ●	-8.33 ↓	0.00 ●	10.00 ↑
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	40,000.00	-2.44 ↓	-13.04 ↓	-15.79 ↓	-18.37 ↓
Ghana	Rice	National Average, (GHS/MT)	13,275.00	-10.40 ↓	-12.16 ↓	-14.75 ↓	
Mali	Rice	Bamako, Wholesale, XOF/100 KG	45,000.00	0.00 ●	-6.25 ↓	-2.17 ↓	-13.46 ↓
Mali	Rice	Gao, Wholesale, XOF/100 KG	65,000.00	0.00 ●	0.00 ●	18.18 ⊗	-7.14 ↓
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	0.00 ●	0.00 ●	0.00 ●	-2.00 ↓
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	0.00 ●	-2.17 ↓	0.00 ●	-6.25 ↓
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	42,000.00	-12.50 ↓	-12.50 ↓	-4.55 ↓	-16.00 ↓
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	56,000.00	-6.67 ↓	-6.67 ↓	-6.67 ↓	-12.50 ↓
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	33,000.00	0.00 ●	-13.16 ↓	-16.46 ↓	-25.84 ↓
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	50,000.00	0.00 ●	0.00 ●	0.00 ●	-9.09 ↓
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	48,000.00	0.00 ●	0.00 ●	0.00 ●	-12.73 ↓
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	520.00	0.00 ●	-13.33 ↓	-20.00 ↓	-28.77 ↓
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	520.00	8.33 ↑	-3.70 ↓	-13.33 ↓	-27.78 ↓
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	480.00	0.00 ●	0.00 ●	-17.24 ↓	-33.33 ↓
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	490.00	-2.00 ↓	-5.77 ↓	-15.52 ↓	-31.94 ↓
Nigeria	Rice (milled)	National Average, NGN/KG	904.61	-9.54 ↓	-25.15 ↓	-22.37 ↓	
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%),
 ↓ = low decrease (0-5%), ↓ = moderate decrease (5-15%), ↓ = high decrease (>15%)

Millet

Figure 17: Price spreads for millet across select West African Countries³⁶

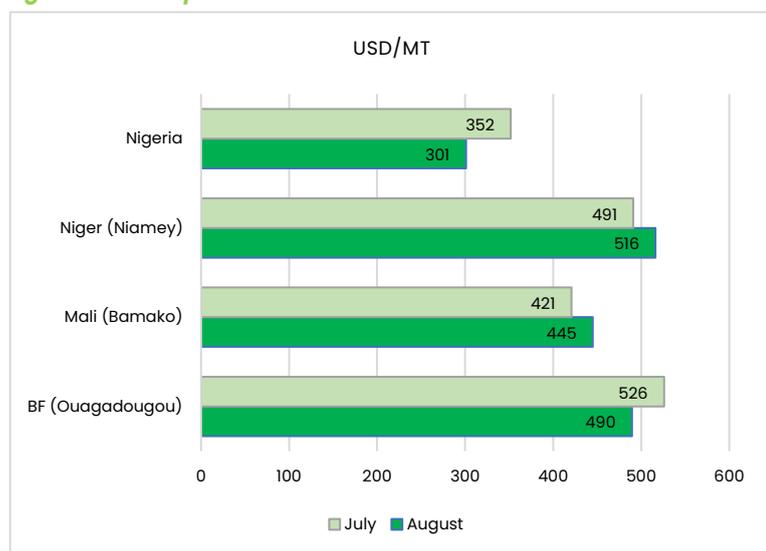


Figure 17 shows millet prices in USD across selected West African countries indicating a mixed market trend. **Niger** (Niamey) and **Mali** (Bamako) recorded month-on-month rice price increases of 5.1% and 5.7%, to USD516/MT and USD445/MT respectively, reversing the previous month's declines of 3.6% and 14%. This rebound suggests renewed upward pressure, potentially driven by ongoing conflict-related disruptions and currency appreciation. Conversely, **Nigeria** and **Burkina Faso** saw notable month-on-month price declines of 14% and 7%, to USD 301/MT and USD 490/MT, respectively, largely

attributed to increased supply from favourable cereal harvests. Furthermore, **Table 16** shows that millet prices in local currency have stabilised or declined compared to the past 1-12 months with only a few exceptions. Notably, millet prices in **Burkina Faso's** Tenkodogo, **Mali's** Bamako, and **Niger's** Agadez and Niamey markets rose month-on-month by 2.56%, 4.17%, 8.7%, and 3.57%, respectively. These moderate increases are concerning as they occur during the harvesting season, potentially signalling supply shortfalls, market disruptions, or delayed post-harvest inflows. Additionally, ongoing insecurity and logistical challenges may be contributing to localised price pressures.

³⁵ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

³⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 16: Percentage changes in millet prices in select West African Countries³⁷

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 ●	2.70 ▲	0.00 ●
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	30,000.00	0.00 ●	-7.69 ↓	0.00 ●	-20.00 ↓
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	38,000.00	0.00 ●	-5.00 ↓	-5.00 ↓	-24.00 ↓
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	32,000.00	0.00 ●	-3.03 ▾	-4.48 ▾	-3.03 ▾
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00 ●	0.00 ●	0.00 ●	0.00 ●
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	27,500.00	-8.33 ↓	-16.67 ↓	-16.67 ↓	-34.52 ↓
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	40,000.00	2.56 ▲	-5.88 ↓	9.59 ↑	-11.11 ↓
Mali	Millet	Bamako, Wholesale, XOF/100 KG	25,000.00	4.17 ▲	-9.09 ↓	-19.35 ↓	-30.56 ↓
Mali	Millet	Gao, Wholesale, XOF/100 KG	35,000.00	0.00 ●	-6.67 ↓	-22.22 ↓	-26.32 ↓
Mali	Millet	Kayes, Wholesale, XOF/100 KG	28,000.00	0.00 ●	-3.45 ▾	-22.22 ↓	-11.11 ↓
Mali	Millet	Mopti, Wholesale, XOF/100 KG	28,000.00	0.00 ●	-11.11 ↓	-15.15 ↓	-30.00 ↓
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	25,000.00	0.00 ●	0.00 ●	-16.67 ↓	-34.21 ↓
Niger	Millet	Agadez, Wholesale, XOF/Kg	400.00	8.70 ↑	0.00 ●	0.00 ●	-23.08 ↓
Niger	Millet	Dosso, Wholesale, XOF/Kg	270.00	-1.82 ▾	0.00 ●	-1.82 ▾	-37.21 ↓
Niger	Millet	Maradi, Wholesale, XOF/Kg	210.00	-16.00 ↓	-16.00 ↓	-23.64 ↓	-42.47 ↓
Niger	Millet	Niamey, Wholesale, XOF/Kg	290.00	3.57 ▲	0.00 ●	-6.45 ↓	-34.09 ↓
Nigeria	Millet	National Average, NGN/KG	463.10	-13.96 ↓	-19.61 ↓	-24.66 ↓	

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%)

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries³⁸

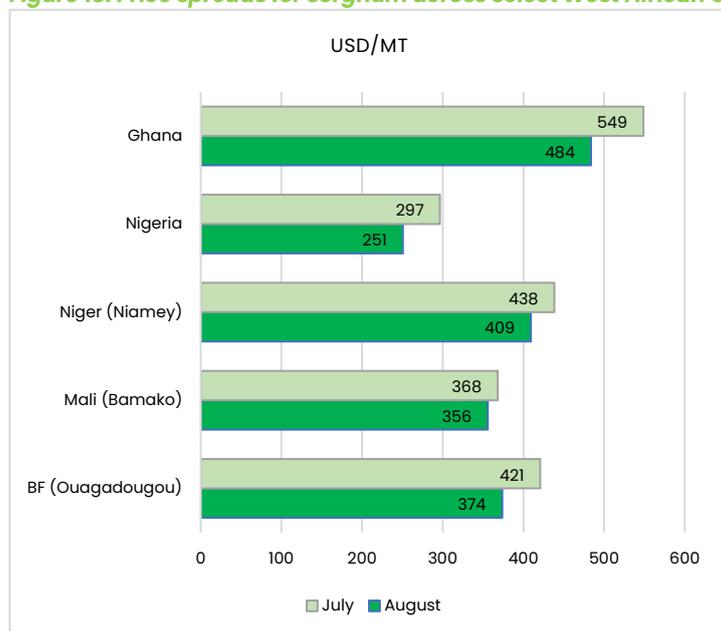


Figure 18 highlights the USD price spread of sorghum across five selected West African countries highlighting a continued month-on-month price decline. **Nigeria, Ghana, and Burkina Faso** recorded significant month-on-month declines in millet prices, falling by 15.4%, 11.8%, and 11.2% to USD 251/MT, USD 484/MT, and USD 374/MT, respectively.

Similarly, **Niger** and **Mali** recorded a modest price decline in the same period, falling by 6.6% and 3.3% to USD409/MT and USD356/MT respectively. These sharp drops are driven by improved supply conditions following favourable harvests and easing market pressures. Despite Ghana's continued price decline, the country still has the highest prices for sorghum in the region.

Table 17 shows that sorghum prices in local currencies have generally remained stable or declined across most of the selected markets over the past 1 - 12 months. A notable exception is **Mali's** Gao market, which recorded a significant month-on-month price increase of 16.67%. Despite this spike, prices remain stable compared to a year ago, highlighting the influence of localised market dynamics, potentially driven by supply chain disruptions, regional insecurity, or seasonal demand fluctuations.

³⁷ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

³⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 17: Percentage changes in sorghum prices in select West African countries ³⁹

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	0.00 ●	0.00 ●	-4.26 ▾	-10.00 ↓
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	25,000.00	0.00 ●	-33.33 ↓	0.00 ●	-16.67 ↓
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	33,000.00	0.00 ●	-5.71 ↓	-12.00 ↓	-17.50 ↓
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	26,000.00	0.00 ●	-3.70 ▾	-3.70 ▾	-16.13 ↓
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	0.00 ●	-9.09 ↓	0.00 ●	-16.67 ↓
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	21,000.00	-12.50 ↓	-23.64 ↓	-22.22 ↓	-33.33 ↓
Ghana	Sorghum	National Average, (GHS/MT)	5,666.67	-1.33 ▾	-17.34 ↓	-19.81 ↓	
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	20,000.00	-4.76 ▾	-4.76 ▾	-9.09 ↓	-31.03 ↓
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	35,000.00	16.67 ⊗			0.00 ●
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00 ●	0.00 ●	0.00 ●	-12.28 ↓
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	23,000.00	0.00 ●	-4.17 ▾	0.00 ●	-28.13 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	20,000.00	0.00 ●	-4.76 ▾	0.00 ●	-20.00 ↓
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	400.00	0.00 ●	0.00 ●	11.11 ↑	-13.04 ↓
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	250.00	0.00 ●	-7.41 ↓	-3.85 ▾	-41.86 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	200.00	-28.57 ↓	-11.11 ↓	-16.67 ↓	-42.86 ↓
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	230.00	-8.00 ↓	-11.54 ↓	-17.86 ↓	-46.51 ↓
Nigeria	Sorghum (white)	National Average, NGN/KG	385.74	-15.01 ↓	-30.69 ↓	-27.26 ↓	

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 **West Africa**, agro-climatic conditions are generally favourable as main season cereal harvesting ramps up across southern areas. In the western parts of the region, harvesting is underway, while planting and crop development continue along the Sahel. Despite localized impacts from both rainfall deficits and flooding, overall weather conditions this season have supported agricultural production. However, concern remains in conflict-affected areas where access and productivity may be constrained.

In **Ghana**, a timely onset and adequate rainfall during the March–July rainy season supported crop development, though July dry spells affected localized areas in both the south and north. Below-average rainfall in August is expected to persist through September across most regions, potentially impacting late-season crop performance.

In **Burkina Faso**, following a delayed start, consistent rainfall since mid-July has supported crop development, especially in Centre-Est and Est regions. In major production zones like Ouest and Nord, crops are at the stem elongation stage, progressing at or above average levels. Central areas show slight delays, with most crops still in the tillering stage. Forecasts indicate average to above-average rainfall through September, which could support normal crop growth, although flood risks remain near waterways. Government support such as free ploughing and input provision has increased in insecure areas, however, access to fields for host communities and IDPs remains limited. Improved seasonal conditions have led to cereal destocking and better market supply in key centres like Pouytenga, Bobo-Dioulasso, and Ouagadougou, resulting in stable or slightly lower prices (10–20% below last month and last year).

In **Mali**, heavy rainfall since late July has caused widespread damage to property, livestock, homes, and crops, particularly in Bamako, Kayes, Koulikoro, Sikasso, Kidal, and Ménaka, affecting over 9,000 people and resulting in 30 deaths as of 11 August. These floods have heightened household vulnerability during the peak of the agricultural lean season, with further risks expected from rising water levels in the Senegal and Niger rivers. Despite the flooding, agricultural activities are progressing normally due to average to

³⁹ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

above-average rainfall. Crop maintenance is ongoing, providing labour opportunities for poor households. As of 10 August, cereal production had reached 88% of the forecast, similar to last year. However, production is expected to decline in conflict-affected central and northern areas due to reduced land access, input shortages, and flood-related losses. From September 2025 to January 2026, food access is anticipated to improve in agricultural zones through harvests, livestock products, and wild foods.

As of 21 August, flooding in **Niger** has affected over 79,000 people, caused 47 deaths, and damaged 272 livestock and 2,051 hectares of crops across 420 villages, according to the General Directorate of Civil Protection. Southern and southwestern regions remain at high risk of further flooding due to forecasts of average to above-average rainfall. Despite these impacts, agricultural and pastoral activities are progressing well in 99% of farming villages as of 31 July, supported by regular rainfall. Millet and sorghum crops are developing normally, ranging from germination to heading stages, with most in tillering and stem elongation. Conditions are also favourable for cash crops, pasture growth, and water replenishment, improving livestock feeding and body condition. However, 149 villages, mainly in Tillabéry and Diffa, have not begun planting due to insecurity and displacement.

Food Trade Updates

East African Region

- The East African Community (EAC) has launched the EAC Bond, a regional customs guarantee that replaces multiple national bonds with a single one for cross-border goods transport. This new system is expected to reduce trade costs, minimise border delays, and free up capital for businesses.⁴⁰

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, August 2025



Ethiopia

- The Government of Ethiopia and Nigeria's Dangote Group have announced a US\$2.5 billion plan to build one of the world's largest fertiliser plants, aiming to boost agricultural productivity across Africa. Signed on 28 August 2025, the deal marks Ethiopia's strategic shift from fertiliser importer to industrial producer.

Tanzania

- The Tanzania Revenue Authority has launched 200 Trade Facilitation Desks nationwide to support traders, address business challenges, and promote entrepreneurship. Operational since 19 August 2025, the desks will also collect feedback to help improve the business environment.
- Tanzania has completed a new US\$110 million commercial and logistics hub in Ubungu, Dar es Salaam, to strengthen regional trade for East and Southern African countries reliant on the Dar es Salaam Port. The East Africa Commercial and Logistics Centre (EACLC) spans 75,000 square metres and includes over 2,000 commercial units, plus warehousing and logistics facilities. It is expected to enhance cargo handling and reduce cross-border trade costs and delays for neighbouring economies like Uganda, Rwanda, Burundi, Zambia, Malawi, Zimbabwe, and the DRC.

⁴⁰ <https://www.eac.int/press-releases/142-customs/3411-eac-launches-regional-customs-bond-to-unlock-trade-efficiency>

Southern Africa Region

Figure 20 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, August 2025



Zimbabwe

The Government of Zimbabwe has reinstated its maize import ban despite production shortfalls, aiming to protect domestic producers and maximise local price gains. Meanwhile, bumper harvests in South Africa and Zambia are reshaping regional grain trade flows. The Zimbabwean government believes current supplies are sufficient to meet local demand in the short term.

Malawi

Malawi's government, through ADMARC, plans to import 200,000 metric tonnes of maize to stabilise markets and ensure national food security during the upcoming lean season.

West Africa Region

Figure 21 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 21: Southern Africa cross-border trade updates, August 2025



Nigeria

Nigeria and Benin have signed a landmark Framework for Enhanced Economic Cooperation, set to unlock over US\$4 billion in annual trade. More than a bilateral deal, the agreement marks a major step toward regional integration and a unified West African market.



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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