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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 62nd 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

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 September 2025 Food Security Monitor edition:

Food Commodity Prices Updates

Staple food prices across **East Africa** showed mixed but generally stable trends, reflecting complex interplay of seasonal harvests, macroeconomic conditions, and regional trade. Maize prices decreased in most countries, with the sharpest drop in Uganda (-17%) due to increased supply, while South Sudan maintained the highest prices despite a 6% decline. Rice prices rose across all markets, led by South Sudan (+14.3%) and Tanzania (+7.3%), reflecting supply constraints and currency effects. Bean prices also trended upward in the short term, particularly in Uganda (+4.7%) and Rwanda (+3.4%), though longer-term trends in Kenya and Tanzania show declines. Wheat prices softened slightly in USD terms in Kenya and Ethiopia, but local currency data indicate sustained inflationary pressure, especially in Ethiopia. Fertiliser prices showed contrasting trends: Kenya experienced significant year-on-year declines in CAN (-44.08%), while Rwanda saw rising prices for Urea and NPK, potentially impacting input affordability.

Southern Africa's commodity markets showed notable volatility, particularly in maize and fertiliser prices across the region. Maize prices rose most sharply in Mozambique (+32.5%) and Malawi (+7%), driven by supply constraints and seasonal demand, while Zambia recorded a moderate increase (+6.8%) despite a steep decline in previous months due to a bumper harvest. Fertiliser prices in Malawi were highly volatile, with urea rising by over 100% year-on-year, posing risks to input affordability and agricultural productivity. Rice and bean markets showed mixed trends: rice prices fell in Malawi and Zambia but rose in Mozambique, while bean prices declined in Malawi and increased in Mozambique. These movements reflect localised supply dynamics and trade flows, with the onset of a La Niña-driven rainy season expected to support improved crop yields and food availability across the region.

In **West Africa**, maize prices fell in Ghana (-9.26%) but rose sharply in Togo (+24%) and Nigeria (+7.34%) due to localised supply constraints. Rice prices declined across most markets, notably in Nigeria (-10.88%) and Togo (-7.48%), with an isolated increase in Togo's Maritime region (+17.7%). Millet prices dropped significantly in Niger (-20.35%) but rose modestly in Nigeria (+3.65%) and parts of Mali. Sorghum prices also declined in Ghana (-5.17%), Niger (-12.47%), and Mali (-9.55%), while Nigeria recorded an increase (+8.76%) due to supply and currency pressures. Overall, price declines were supported by improved supply, trader destocking, and favourable harvests, although flooding and conflict in parts of Nigeria, Ghana, Mali, and Niger pose ongoing risks to agricultural productivity and market stability.

Food Security Updates

As of September 2025, the food and nutrition security situation in **East and Central Africa** remains critical. In Sudan and South Sudan alone, approximately 721,000 people are facing IPC Phase 5 (Famine/Catastrophe) conditions. Across the IGAD region, 11.5 million people are in IPC Phase 4 (Emergency) and 28 million in IPC Phase 3 (Crisis). Across the 10 countries covered by the IPC analysis, the number of people affected has reached 71 million. Alarmingly, more than six million children in the IGAD region are suffering from acute malnutrition, underscoring the urgent need for coordinated humanitarian and policy responses.

In **Southern Africa**, food insecurity remains a pressing concern across several countries. In Malawi, Crisis (IPC Phase 3) outcomes persist in southern districts due to poor harvests, high maize prices and low incomes, with the lean season starting earlier than usual. Mozambique faces similar conditions, particularly in the north where conflict has displaced thousands and disrupted livelihoods, while southern and central semi-arid areas continue to struggle with the aftermath of droughts and limited market access. In Zimbabwe, although most households still rely on own-produced food following a favourable harvest, poor households in deficit-producing regions are increasingly dependent on markets amid constrained purchasing power. According to the latest IPC analysis, 45% of Zimbabwe's rural population is in Crisis or Emergency (IPC Phase 3 or 4).

In **West Africa**, food insecurity remains widespread, particularly in conflict-affected regions. In Burkina Faso, poor households in areas like Sebba and Arbinda face severe food consumption deficits due to market disruptions and limited aid, while other localities benefit from subsidised cereals and local harvests, although low incomes still restrict access. Mali is experiencing rising insecurity and displacement, especially in the south and west, with blockades disrupting trade and driving up food prices. Niger continues to face acute food insecurity in conflict-hit regions, worsened by flooding that affected over 268,000 people and damaged crops and livestock. Despite favourable rainfall

supporting overall yields and falling food prices, recovery remains limited in flood- and conflict-affected areas. Nigeria has the highest burden, with around 30.6 million people in Crisis or worse (IPC Phase 3 or above), driven by conflict and poor nutrition, while Ghana has about two million people facing similar conditions, highlighting the need for targeted interventions across the region.

Food Trade Updates

- Kenya has officially joined Tanzania in implementing a container guarantee system, effectively eliminating the long-standing requirement for cash deposit guarantees on cargo containers. This marks a significant step toward streamlining trade across the region. With the adoption of the container guarantee service at the ports of Mombasa and Lamu, importers can expect a smoother and more cost-effective process.
- The Nigeria Customs Service (NCS) has rolled out a new policy exempting imports valued at US$ 300 or less from duties and taxes. This initiative is designed to streamline trade processes, encourage cross-border e-commerce, and reduce operational costs for businesses. Effective from September 8, 2025, the US$300 de minimis threshold applies to goods arriving through express delivery services or carried as passenger baggage. However, the exemption does not apply to items that are prohibited or restricted under Nigerian import regulations.

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

In September 2025, Niger and Mali were the hunger hotspots, with 76.6% and 52.46% of their populations facing insufficient food consumption (IFC), with Burkina Faso and South Sudan approaching this level at 46.5% and 40.2% respectively. Year-on-year, IFC has declined in Nigeria (-46.2%) and Zimbabwe (-21%), but risen sharply in Uganda (+127.8%), Ghana (+64.7%), Togo (+42.1%), Rwanda (+38.4%), and South Sudan (+11.3%).

Compared to six months ago, maize and imported rice prices have generally been lower, except in Ethiopia (+14.9%), Kenya (+3.36%), Rwanda (+12.37%), South Sudan (+49.62%), and Uganda (+41.9%). Compared to last year, mixed trends are observed. Prices have increased in Ethiopia, Kenya, South Sudan, Tanzania, and Uganda but declined in the rest.

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	○	-58.37	↓	-14.21	↓
Ethiopia					14.93	↑	6.24	↑
Ghana	0.00	○	64.71	↑	-29.38	↓		
Kenya	0.00	○	0.00	○	3.36	↑	20.56	↑
Malawi	0.00	○	0.00	○	-6.05	↓	-14.70	↓
Mali	0.00	○	0.00	○	-60.30	↓	-104.69	↓
Mozambique	0.00	○	0.00	○	-25.10	↓		
Niger	0.00	○	0.00	○	-94.85	↓	-140.67	↓
Nigeria	0.00	○	-46.23	↓	-22.66	↓		
Rwanda	0.00	○	38.46	↑	12.37	↑		
South Sudan	0.00	○	11.36	↑	49.62	↑	106.27	↑
Tanzania	0.00	○	0.00	○	-14.71	↓	20.83	↑
Togo	0.00	○	42.11	↑	-42.02	↓	-90.65	↓
Uganda	0.00	○	127.85	↑	41.96	↑	68.15	↑
Zambia	0.00	○	0.00	○	-43.37	↓	-28.90	↓
Zimbabwe	0.00	○	-21.05	↓				

Key: ○ No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, September 2025

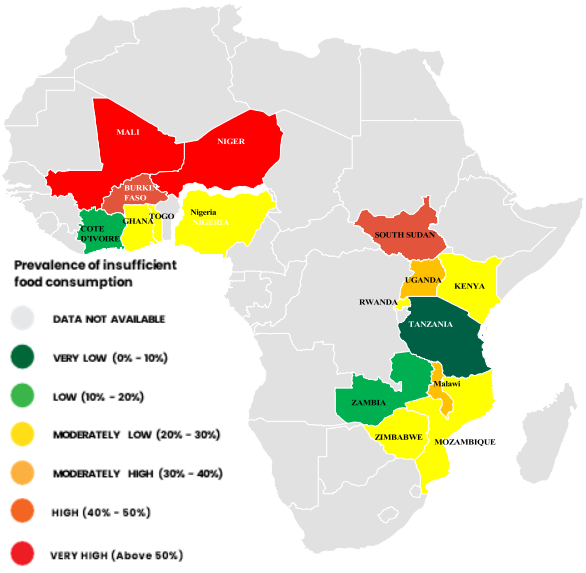
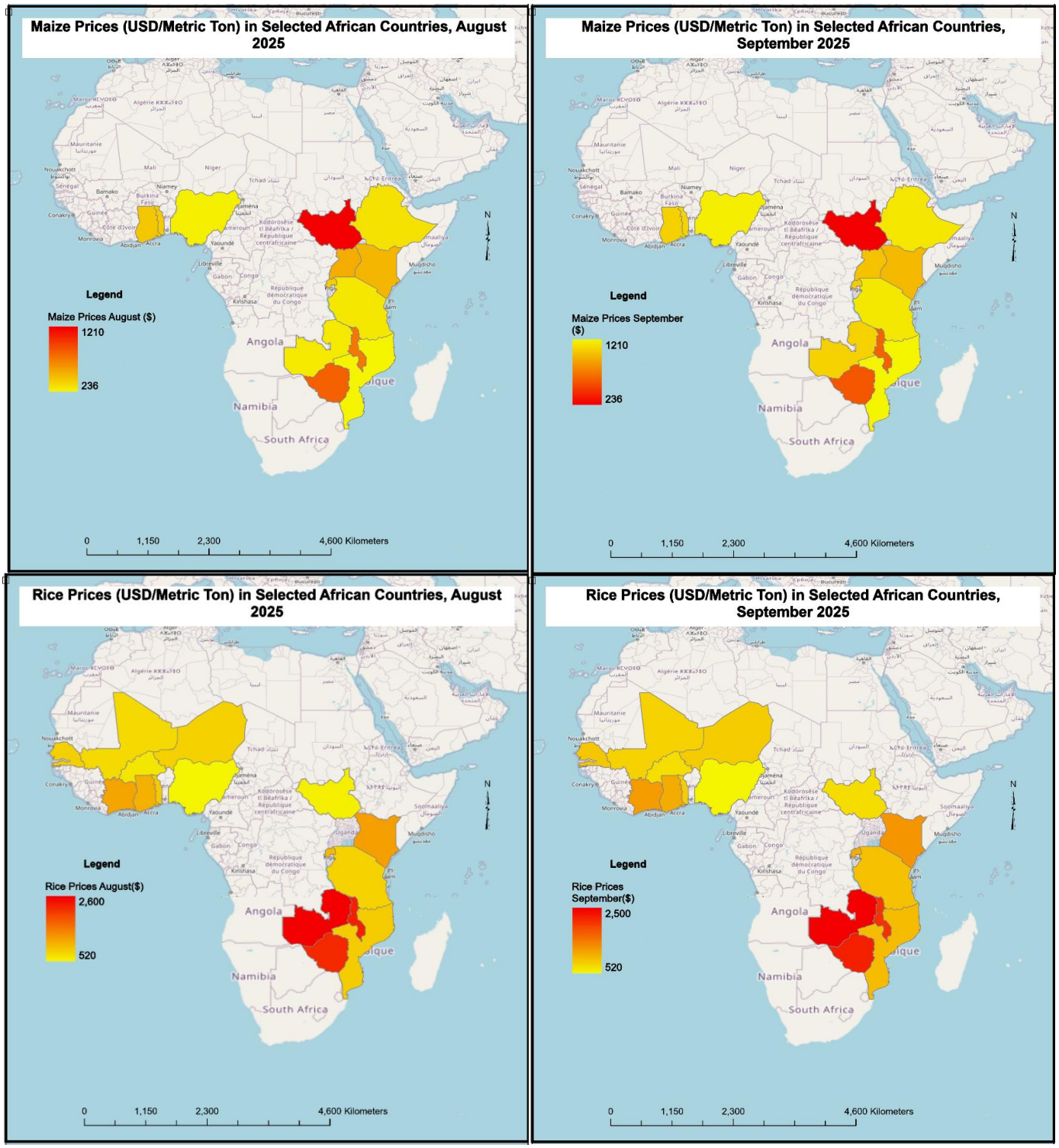


Figure 2 presents maize and rice prices across the monitored countries as of September 2025. Maize prices (in USD per metric tonne) were highest in South Sudan (USD 1,113/MT), followed by Zimbabwe USD 825/MT, and Malawi USD 778/MT. Mozambique and Nigeria recorded the lowest maize prices at USD 252/MT and USD278/MT respectively – although this is about 7% increment over August for both countries. On the other hand, rice prices remained highest in Zambia (USD 2,502/MT) and Zimbabwe (Epsworth) (USD 2,225/MT), while they were lowest in Nigeria (USD 524/MT)

[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).

and South Sudan (USD 727/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 128.8 points in September 2025, down from 129.7 points in August. The fall was driven by declines in the cereals, dairy, sugar, and vegetable oil sub-indices, which outweighed a modest rise in the meat index. Compared with September 2024, the FFPI was up by 3.4%, but it remained 19.6% below its March 2022 peak. This reflects a continued moderation in global food prices despite some year-on-year increases. In September 2025, the International Grains Council (IGC) Grain and Oilseeds Index (GOI) stood at 210.07, a 2.5 % month-on-month and 8.9%. year-on-year decline. Most major grains experienced price declines both month-on-month and year-on-year. Wheat fell by 2% in September and 9.9% compared to the previous year, while maize dropped by 3.2% monthly but 2.4% annually. Rice saw the steepest annual decline at 31.4%, despite a modest 1.8% monthly decrease. Soybeans declined by 2.5% in September and 5.7% year-on-year. Barley was the only commodity to show a positive monthly change, rising by 2.9%. These trends suggest continued pressure on global grain markets, with food prices generally trending downward, except for barley, which showed some resilience.

Figure 3: FAO Food Price Index (FFPI)2

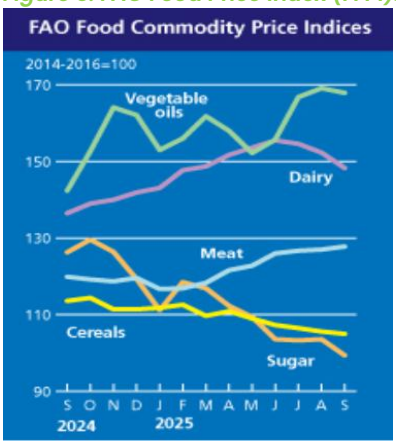


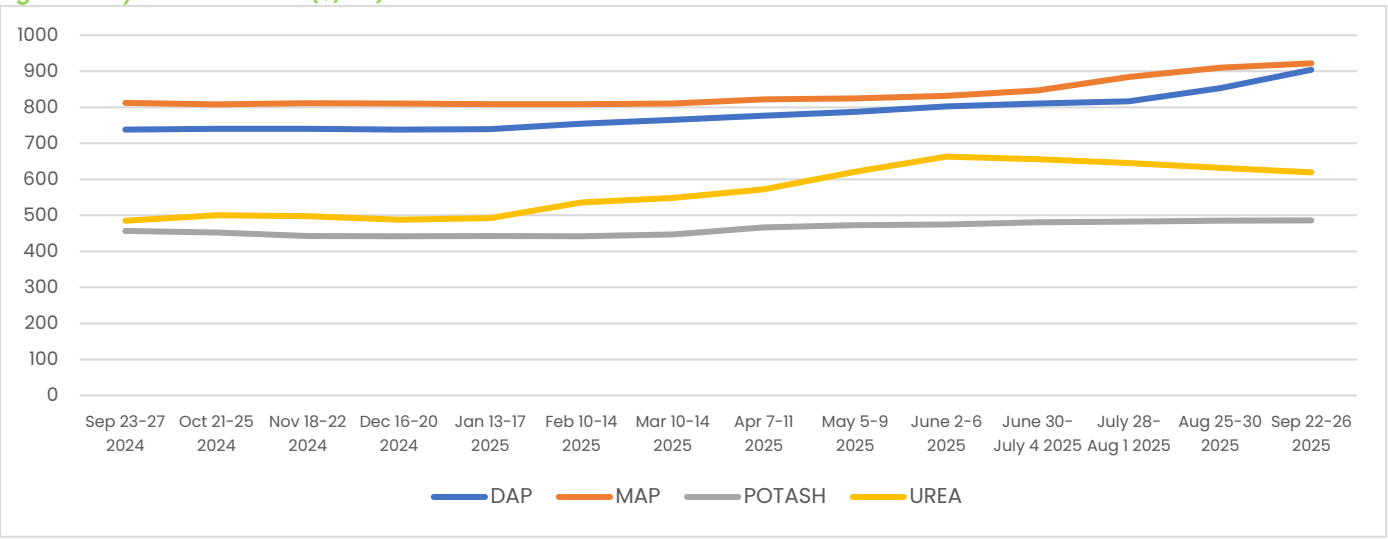
Table 2: IGC GOI Commodity Price Indices 3

Jan 2000 = 100	30-Sep	*% Change*	*% Change*
GOI	210.07	*-2.55*	*-8.99*
Wheat	190.00	*-2.08*	*-9.98*
Maize	216.02	*-3.25*	*-2.48*
Rice	158.33	*-1.80*	*-31.44*
Soyabeans	206.63	*-2.52*	*-5.79*
Barley	226.11	-	*2.95*

Global Fertiliser Prices

In September 2025, fertiliser prices showed mixed trends across key types. Diammonium phosphate (DAP) and monoammonium phosphate (MAP) rose by 6.0% and 1.3% respectively compared to August, while potash saw a marginal increase of 0.2%. In contrast, urea prices declined by 2.1% month-on-month. On a year-on-year basis, all fertilisers recorded notable increases, with urea rising sharply by 27.6%, DAP by 22.5%, MAP by 13.5%, and potash by 6.3%. These annual gains reflect strong seasonal demand, although the recent monthly dip in urea suggests some easing in short-term demand or supply adjustments.

Figure 4: Dry Fertiliser Prices ($/MT)



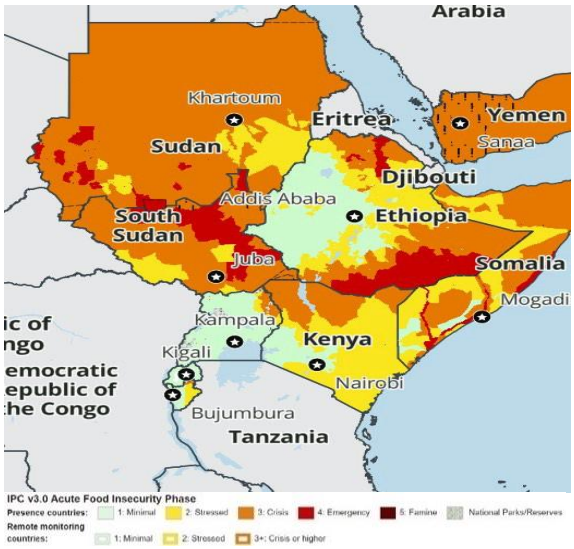
Source: *Author's construction based on DTN* [4]

[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, September 2025



As of September 2025, the food and nutrition security situation in East and Central Africa remains critical. In Sudan and South Sudan alone, approximately 721,000 people are facing IPC Phase 5 (Famine/Catastrophe) conditions.[5] In the IGD region overall, 11.5 million are in IPC Phase 4 (Emergency) and 28 million in IPC AFI Phase 3 (Crisis). Across the 10 countries[6] covered by the IPC analysis, the total number of people affected has reached 71 million. Alarmingly, more than six million children in the IGAD region are suffering from acute malnutrition, underscoring the urgent need for coordinated humanitarian and policy responses.

In **South Sudan**, persistent conflict, widespread flooding, economic decline, impact of the lean season, and large numbers of returnees and refugees are driving the acute food insecurity and malnutrition.[7] Counties in Upper Nile and northern Jonglei such as Nasir, Ulang, Panyikang, Longochuk, Fangak, and Canal/Pigi are experiencing widespread IPC Phase 4 (Emergency) conditions, with pockets of IPC Phase 5 (Catastrophe) expected through January due to poor harvest prospects. There is a credible risk of famine (IPC Phase 5) if conflict and floods further isolate communities and worsen disease outbreaks like cholera. Other affected areas, including parts of Unity, Greater Pibor, Warrap, and Greater Equatoria are also projected to remain in Emergency or Catastrophe phases. In less affected regions, food security may improve slightly with seasonal harvests and access to livestock, fish, and wild foods.

In **Ethiopia**, acute food insecurity remains severe, particularly in conflict-affected regions such as Tigray, Amhara, and Afar. According to the most recent IPC analysis, over 8.5 million people are facing Crisis or worse (IPC Phase 3 or above), including approximately 400,000 people in Catastrophe (IPC Phase 5), the highest number recorded since the 2011 Somalia famine. The crisis is driven by conflict, displacement, restricted humanitarian access, and loss of livelihoods.

In **Kenya**, Crisis (IPC Phase 3) food insecurity is expected to persist in pastoral areas (Turkana, Marsabit, and Mandera) through September, and expand to Wajir, Tana River, and Garissa between October and January 2026, driven by below-average short rains that will inadequately replenish rangeland and water resources.[8] Livestock conditions are likely to deteriorate, and high food prices coupled with limited income will restrict access to food, forcing households to adopt negative coping strategies. In marginal agricultural areas, Stressed (IPC Phase 2) outcomes will continue through January due to poor crop production from consecutive below-average rainy seasons, elevated market reliance, and limited labour income. If the short rains perform significantly below average, Crisis (IPC Phase 3) outcomes could extend to all pastoral regions and parts of Kitui, Makueni, Taita Taveta, and Lamu, driven by worsening livestock conditions, poor crop yields, and constrained food access.

Prevalence of Insufficient Food Consumption

In September 2025, the proportion of the total population experiencing insufficient food consumption (IFC) across five East African countries varied widely, with no change reported from the previous month (**Table 3**). The total number affected is estimated at **45.3 million**. Compared with the same period last year, the overall trend shows mixed progress, with some countries experiencing sharp increases in food insecurity. Uganda recorded the highest number of affected individuals at 18 million, representing 35% of its population, a dramatic 127.9% increase from the previous year and an 81.8% rise over two years, indicating a significant deterioration in food security.

South Sudan followed, with 40.2% of its population affected, an 11.4% increase from last year and 25.6% over two years, highlighting persistent vulnerability. Rwanda also saw worsening conditions, with 29.3% of its population facing IFC, up

[5] Food Security & Nutrition Working Group, East and Central Africa Region. 25th September 2025
[6] Burundi, CAR, DRC, Djibouti, Kenya, South Sudan, Sudan, Uganda, and Tanzania.
[7] https://fews.net/east-africa/south-sudan
[8] https://fews.net/east-africa/kenya

38.5% from last year and 16.1% over two years. Kenya reported 23.6% of its population affected, with a 12.4% increase compared to two years ago, though no change from last year. Tanzania had the lowest proportion at 7.4%, with only a 4% increase over two years and stable conditions year-on-year.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (September 2025)[9]

Country	Total Population (millions)	People with IFC (millions)*	People with IFC (millions)**	% of total population with IFC	Change in people with IFC from previous month (%)	Change in people with IFC 1 year ago	Change in people with IFC from 2 years ago
Kenya	51.4	13.60	13.60	23.6	0.00	0.00	12.40
Rwanda	12.3	3.60	3.60	29.3	0.00	38.46	16.13
South Sudan	11	4.90	4.90	40.2	0.00	11.36	25.64
Tanzania	56.3	5.20	5.20	7.4	0.00	0.00	4.00
Uganda	42.7	18.00	18.00	35.0	0.00	127.85	81.82

**Current month and **Previous month*

Commodity Prices

Key drivers of commodity prices in EA

	**Conflicts**	Conflicts and insecurity persist, particularly in South Sudan and Ethiopia, hindering effective price stability and trade flows.
	**Seasonal Dynamics**	Above average rainfall in some areas such as Uganda resulted to rising of Nile River water levels affecting crops in 13 counties across four states hence affecting prices.
	**Macroeconomic Shocks**	South Sudan continues to experience high prices due to poor macroeconomic conditions, currency depreciation and trade disruptions.

Maize

Figure 6: National average price spreads for maize across select East African Countries[10]

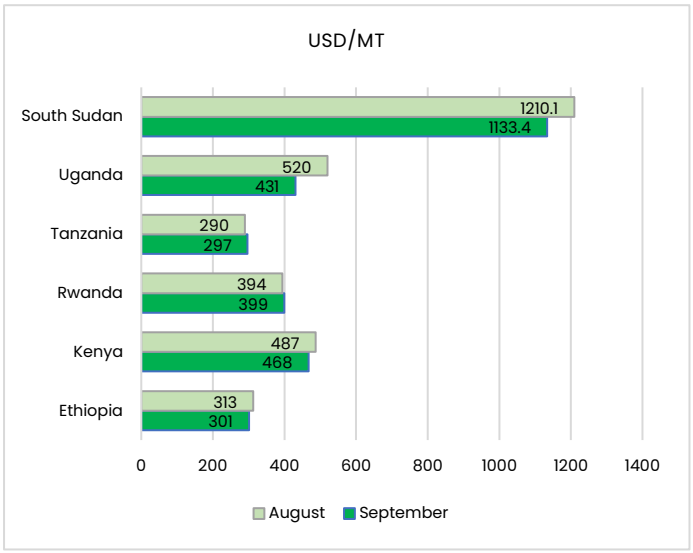


Figure 6 shows maize prices (in USD) across six Eastern African countries, with most markets recording month-on-month declines from August to September 2025. **South Sudan** posted the region's highest maize prices despite a modest 6% month-on-month decrease to USD 1,133/MT as captured by the World Food Programme (WFP). **Kenya** followed by afar, with prices easing to USD 468/MT in September—a 4% month-on-month decline, according to data from the Ministry of Agriculture and Livestock Development (KAMIS). The price drop was supported by improved supply from the ongoing major harvest season. **Tanzania** recorded the lowest prices in the region at USD 297/MT, despite a 3% month-on-month increase driven by the appreciation of the Tanzanian shilling against the US dollar, coupled with tightening supply from neighbouring countries in the Southern region. Conversely, **Ethiopia** continued to post declines, reaching USD 301/MT, the second lowest in the region, driven by improved supply following the recent harvests. **Uganda** recorded recorded a sharp month-on-month decrease of **17%** to **USD 431/MT**, largely attributed to higher domestic availability from the delayed first-season harvest.[11] Conversely, **Rwanda** recorded a modest 1% month-on-month price increase to USD 399/MT, primarily driven by

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

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

[11] September FPMA Report Food Price Monitoring and Analysis (FPMA) Bulletin #7, 11 September 2025

currency fluctuations inflating fuel prices and transport costs. These constraints stemmed from poor on-farm production, largely due to a sharp rise in input costs that limited farmers' ability to apply adequate inputs and boost productivity[12].

Table 4 summarises maize prices in local currency across East Africa. **Ethiopia** recorded a slight 2.5% month-on-month decline, but remain 6.4% higher over three months and 14.9% over six months, indicating a longer-term upward trend driven by weak national currency, inflating fuel prices and transport costs[13]. In **Kenya**, maize prices saw a 4% monthly decline and an 11% drop over three months, reflecting improved supply from the ongoing harvest. However, the 20.6% year-on-year increase suggests seasonal price variations and persistent structural challenges in the market. In contrast, **South Sudan** maize price declined by 5.5% month-on-month owing to the arrival of local harvests and Ugandan imports in the market. However, the prices remain elevated compared to previous periods, being 17% higher than three months ago, 49.6% higher than six months, and a 106.3% year-on-year surge. This sharp upward trend points to significant macroeconomic challenges, supply constraints and exacerbated by conflict, logistical challenges and currency depreciation.

Table 4: Percentage changes in maize prices in East Africa[14]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,336.46	-2.48 ↘	6.44 ↑	14.93 ↑	6.24 ↑
Kenya	Maize	National Average, Retail, KES/KG	60.05	-3.99 ↘	-11.06 ↓	3.36 ▲	20.56 ⊗
Rwanda	Maize	National Average, Retail, RWF/Kg	575.51	1.21 ▲	-1.72 ↘	12.37 ↑	
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	5,179.59	-5.55 ↓	17.09 ⊗	49.62 ⊗	106.27 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	72,500.00	0.00 ●	-9.38 ↓	-14.71 ↓	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 September 2025, * August 2025, and ** July 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[15]

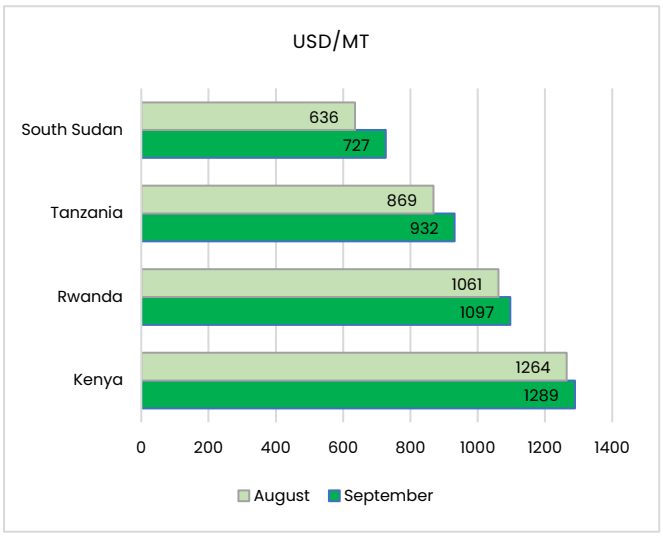


Figure 7 illustrates month-on-month increases in rice price trends (in USD) across four Eastern African countries highlighting a regional trend of rising rice prices. This upward trend reflects varying degrees of market pressure, supply dynamics, and possibly currency fluctuations. **South Sudan** experienced the sharpest increase, with prices rising to USD 727/MT, marking a 14.3% jump. This significant rise is attributed to severe and persistent macroeconomic challenges. **Tanzania** followed with a 7.3% increase to USD 932/MT, likely driven by seasonal demand, regional trade factors and currency appreciation. **Rwanda** saw a more modest increase of 3.4%, moving to USD 1097/MT, suggesting relatively stable market conditions with mild inflation. **Kenya** maintained the highest rice prices in the region, increasing to USD 1289/MT, a 2% rise. This reflects a mature market, possibly influenced by import dependency and higher consumer demand. These movements underscore the need for close monitoring of supply chains and regional coordination to manage food price inflation and ensure affordability.

The local currency price movements (**Table 5**) broadly aligned with USD-denominated trends, reflecting a general rise in rice prices, though with varying intensities across markets and timeframes. **South Sudan** recorded the steepest increases, with rice prices surging by 15.4% month-on-month and 34% year-on-year driven by acute supply constraints, currency depreciation, and inflationary pressures. Rwanda and Kenya also showed consistent increases. **Rwanda**'s rice prices rose by 3.3% month-on-month and 11.6% over six months, indicating a firm price momentum.

[12] Rwanda's Maize Output Ambitions at Risk as Input Prices Surge - Farmers Review Africa

[13] September FPMA Report Food Price Monitoring and Analysis (FPMA) Bulletin #7, 11 September 2025

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

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

Kenya recorded a more moderate but steady increase, up 1.9% month-on-month and 6.9% year-on-year, suggesting relatively stable market conditions supported by balanced supply and demand. In **Tanzania**, prices have begun to rise following the end of the main season harvests, with a 4.6% month-on-month increase and a 22.97% year-on-year rise, pointing to emerging upward pressure on market prices. Overall, rice prices across the region are trending upwards, driven by a mix of supply constraints, macroeconomic pressures, and seasonal factors

Table 5: Percentage changes in rice prices in East Africa[16]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	165.48	1.88 ▲	2.09 ▲	3.40 ▲	6.91 ↑
Rwanda	Rice	National Average, Retail, RWF/Kg	1,580.25	3.27 ▲	4.78 ▲	11.56 ↑	
South Sudan	Rice	National Average, Retail, SSP/Kg	3,323.20	15.39 ⊗	17.10 ⊗	23.67 ⊗	34.00 ⊗
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	227,500.00	4.60 ▲	-3.19 ↘	0.00 ●	22.97 ⊗

Note: Last price is for September 2025, * August 2025, and ** July 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[17]

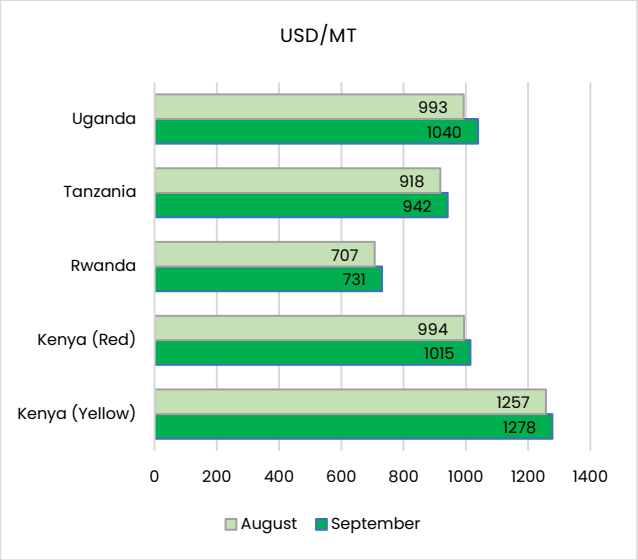


Figure 8 highlights a consistent upward trend in bean prices across four East African countries, signaling emerging market pressures. **Uganda** recorded the sharpest increase (4.7% to USD 1,040/MT), likely driven by tightening supply and rising regional demand. **Rwanda**, despite having the lowest price levels, saw a notable 3.4% rise, suggesting growing market pressure. **Tanzania** experienced a moderate 2.6% increase, potentially linked to seasonal factors. **Kenya**'s bean market exhibits a dual pricing structure with distinct dynamics for red and yellow-green bean varieties. In September, red beans were priced at USD 1,015/MT, reflecting a 2.1% month-on-month increase, while yellow beans reached USD 1,278/MT, rising by 1.7%. The uniform price increases across markets point to shared regional drivers such as reduced harvest volumes, inflation, and shifting trade flows.

Table 6 shows mixed trends in bean prices across selected East African markets, with notable differences in price movements. In **Kenya**, both yellow-green and red haricot beans recorded modest month-on-month increases of 1.56% and 2.01%, respectively. However, when viewed over longer timeframes, both varieties show notable declines. Yellow-green beans are down 13.45% year-on-year, while red haricot beans have dropped by 24.26% over three months. The short-term uptick reflects seasonal fluctuations, but the broader decline points to a stabilisation in the market driven by improved supply. Tanzania and Uganda both show declines across multiple timeframes, though with differing short-term dynamics. **Uganda** recorded the sharpest one-month drop at 13%, with continued downward movement ranging between 2.98% and 14.17% across longer periods. **Tanzania**, while stable in the short term, records decline of 14.02% over three months, 15.6% over six months and 11.54% year-on-year, indicating a sustained softening of market conditions. In contrast, **Rwanda** recorded consistent price increases across all periods, including a 3.22% rise over one month and 6% over six months, indicating tightening supply or rising demand. These divergent trends reflect varying market conditions and may influence regional trade flows, with Rwanda potentially increasing import demand while Uganda and Tanzania offering favourable prices for exports to the region.

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

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

Table 6: Percentage changes in bean prices in East Africa[18]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	164.03	1.56 ▲	-12.15 ↓	-9.93 ↓	-13.45 ↓
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	130.28	2.01 ▲	-24.26 ↓	-10.10 ↓	-8.50 ↓
Rwanda	Beans	National Average, Retail, RWF/Kg	1,052.67	3.22 ▲	4.81 ▲	6.05 ↑	
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	230,000.00	0.00 ●	-14.02 ↓	-15.60 ↓	-11.54 ↓
Uganda	Beans	National Average, Retail, UGX/Kg*	3,517.31	-13.72 ↓	-14.17 ↓	-2.98 ↘	-6.81 ↓

Note: Last price is for September 2025, * August 2025, and ** July 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

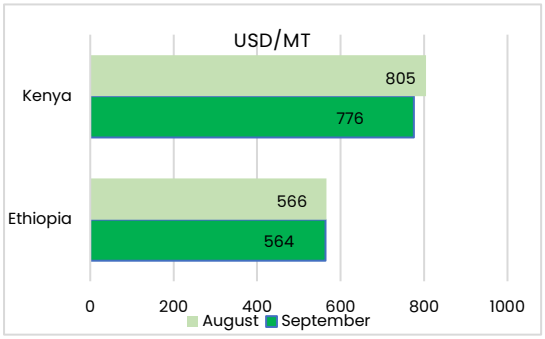


Figure 9 presents wheat price trends (in USD) for, Ethiopia and Kenya, with both recording slight month-on-month declines, indicating softening market conditions and currency fluctuations. Kenya saw a 3.6% to USD 776/MT, while Ethiopia experienced a marginal 0.4% decrease to USD 564/MT. Similar patterns are reflected in local currency terms (**Table 7**). In **Ethiopia**, prices rose steadily across all timeframes—1.07% month-on-month, 10.57% over three months, 5.13% over six months, and 11.91% year-on-year—indicating sustained upward pressure likely driven by supply constraints and inflation. In **Kenya**, the trend is more mixed: prices declined 3.66% month-on-month, remained nearly flat over three months (+0.03%), but increased 6.27% over six months and 2.61% year-on-year, suggesting short-term easing possibly due to improved supply or lower import costs, while longer-term movements reflect moderate inflationary effects. Meanwhile, international wheat prices have declined for the third consecutive month, which the FAO[19] attributes to subdued global demand and confirmation of large harvests in major producing countries. This has enabled importers to delay purchases, further easing pressure on global markets.

Table 7: Percentage changes in wheat prices in East Africa[20]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,126.96	1.07 ▲	10.57 ↑	5.13 ↑	11.91 ↑
Kenya	Wheat	National Average, Retail, KES/KG	99.57	-3.66 ↘	0.03 ▲	6.27 ↑	2.61 ▲

Note: Last price is for September 2025, * August 2025, and ** July 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 prices in Kenya and Rwanda show mixed patterns across the different fertiliser products. In **Kenya**, CAN prices show a consistent decline compared to previous periods, dropping by -7.68% over the past month and -44.08% year-on-year, indicating sustained downward pressure. DAP and NPK show short-term price increases (+6.57% and +4.81% respectively over one month), but both have diminished prices compared to the previous 3-12 months, with DAP down -7.00% and NPK down -6.04% year-on-year. These prices indicate a reduction in input costs that would encourage increased application of inputs by farmers in the coming agricultural season. Conversely, in **Rwanda**, prices are generally high: urea increased by +3.20% in one month and +12.13% compared to three months ago, while NPK remained stable in the short term (-0.14%) but rose by +7.60% compared to three months and +7.54% over six months. These high prices are likely to impact farmers' uptake of inputs due to the likelihood of an increase in production costs. Therefore, timely policy interventions may be needed to ensure fertiliser access remains stable and affordable.

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

[19] See Global cereal prices ease in September as wheat, maize decline: FAO - Milling Middle East & Africa Magazine - No.1 Grains Industry Magazine & Website for Africa & the Middle East

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

Table 8: Percentage changes in fertiliser prices in East Africa[21]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	67.53	-7.68	-33.70	-27.95	-44.08
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	118.00	6.57	4.73	-5.34	-7.00
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	100.62	4.81	-0.80	-4.41	-6.04
Rwanda	NPK	National Average USD/50kg	797.28	-0.14	7.60	7.54	
Rwanda	Urea	National Average USD/50kg	791.31	3.20	12.13	6.81	

Note: Last price is for September 2025, * August 2025, and ** July 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[22]

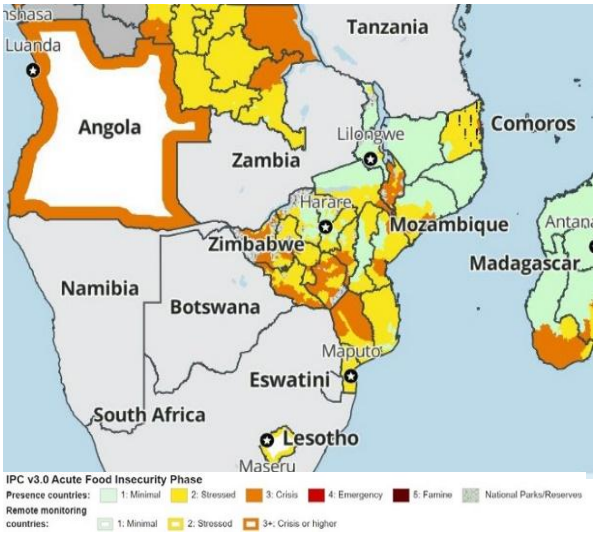
Cereal crop conditions across **East Africa** are mixed, shaped by varied rainfall performance and seasonal dynamics. In **Kenya**, long rains maize harvesting has concluded under mixed conditions in the eastern bimodal and marginal areas, while coastal counties recorded above-average yields due to well-distributed rainfall. In contrast, western unimodal regions are still planting and developing long rains cereals under favourable conditions. In **Ethiopia**, Meher season cereal harvesting has begun, but concerns persist due to erratic rainfall and flooding, despite generally near to above-average *Kiremt* rains. In **Uganda**, first season cereal harvesting is nearly complete, and second season planting is underway under favourable conditions, although abnormal dryness in the northwest—caused by below-average rainfall since mid-April may impact crop performance. In **Tanzania**, planting of *Vuli* season maize and sorghum has just begun, but delayed rainfall onset is a growing concern. This delay may affect germination and early crop development, potentially impacting overall seasonal performance if the rains do not normalise soon. Lastly, in **Rwanda** and Burundi, planting of Season A crops has just commenced, though rains have yet to fully establish. In **Burundi**, forecast La Niña conditions are expected to result in below-average rainfall through December, raising concerns about potential impacts on crop establishment and early development.

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

[22] Crop Monitor No. 109 – October 2025: EarlyWarning_CropMonitor_202510.pdf

Southern Africa Food Security Update

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



Crisis (IPC Phase 3) food insecurity persists in several southern **Malawi** districts, particularly Neno, Mwanza, Blantyre, Thyolo, Mulanje, and Phalombe, due to poor harvests, high maize prices, and low incomes, with the lean season expected to begin two months early in October.[23] Households in these areas face limited labour opportunities and rising costs, reducing purchasing power and access to adequate food. Meanwhile, central and northern surplus-producing regions currently experience Minimal (IPC Phase 1) outcomes, supported by own-produced stocks from the 2025 harvest. However, as these stocks deplete and market reliance grows amid below-average incomes, parts of the central region are expected to shift to Stressed (IPC Phase 2) conditions.

In **Mozambique**, Crisis (IPC Phase 3) food insecurity continues in northern Mozambique due to escalating attacks by non-state armed groups in Cabo Delgado, displacing thousands and disrupting agriculture, mining, and infrastructure, most recently in Balama district. Displaced households face urgent needs for food, shelter, and protection.[24] In southern and central semi-arid districts, poor households are also experiencing Crisis outcomes, struggling to recover from consecutive droughts, depleted food stocks, and limited income opportunities. While those near trade corridors engage in charcoal production to earn income, remote households face greater challenges accessing markets and alternative livelihoods, leading to food consumption gaps and negative coping strategies such as reducing meal sizes and prioritising children's food needs.

Most households in **Zimbabwe** continue to rely on own-produced food following a favourable 2025 harvest, but poor households in deficit-producing areas, particularly in the south, east, west, and far north, are beginning to deplete their stocks, increasing dependence on markets amid constrained purchasing power.[25] As a result, food assistance needs are expected to rise moderately through at least February 2026. Improved water availability from the above-average 2024/25 rainy season is supporting seasonal livelihoods and boosting incomes, with national dam levels at 80% and Lake Kariba holding 16% of usable live storage for hydropower. However, food insecurity remains a concern, according to the latest IPC analysis, 45% of Zimbabwe's rural population is in Crisis or Emergency (IPC Phase 3 or 4), and 29% in Stressed (IPC Phase 2), highlighting the need for continued support in vulnerable areas.[26]

Prevalence of Insufficient Food Consumption

In September 2025, the total population experiencing insufficient food consumption (IFC) in Malawi, Mozambique, Zambia, and Zimbabwe remained approximately below 30%, with no change from the previous month. The total number of affected individuals was 22.2 million. Compared with the same period last year, this marks a modest improvement, with 1.2 million fewer people facing food insecurity, primarily due to a 21% decline in Zimbabwe. However, longer-term trends show mixed progress. Malawi has seen a sharp 51% increase in food-insecure individuals over the past two years, indicating worsening conditions. In contrast, Zambia recorded a significant 23.2% reduction, reflecting notable improvement. Mozambique experienced a slight decline in food insecurity, while Zimbabwe's two-year trend shows a 12.5% increase despite recent gains. These patterns highlight the need for sustained and targeted interventions, especially in Malawi and Zimbabwe, where food insecurity remains high or has deteriorated over time.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (September 2025)[27]

Country	Total Population (millions)	People with IFC (millions)*	People with IFC (millions)**	% of total population with IFC	Change in people with IFC from previous month (%)	Change in people with IFC 1 year ago	Change in people with IFC from 2 years ago
Malawi	18.1	6.80	6.80	30.6	0.00	0.00	51.11

[23] https://fews.net/southern-africa/malawi
[24] https://fews.net/southern-africa/mozambique
[25] https://fews.net/southern-africa/zimbabwe
[26] https://www.ipcinfo.org/ipcinfo-website/ipc-dashboard/
[27] Author's construction based on HungerMap

Mozambique	29.5	7.60	7.60	21.3	0.00	0.00	-8.43
Zambia	17.4	3.30	3.30	15.1	0.00	0.00	-23.26
Zimbabwe	15.2	4.50	4.50	26.5	0.00	-21.05	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 and stability in grain prices as the harvest season concludes 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, power 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[28]

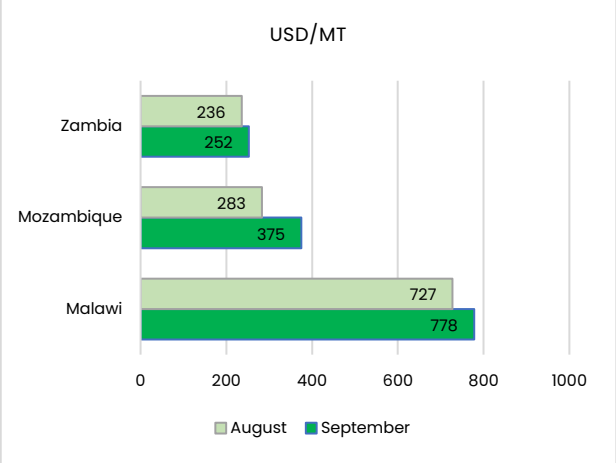


Figure 11 illustrates maize price movements (in USD) across Zambia, Mozambique, and Malawi between August and September, with all three countries recording increases. **Zambia**'s price rose by 6.8% to USD 252/MT, driven by depleting stocks and strong seasonal demand, as the Zambia Food Reserve Agency reportedly purchased over 40% (1.6 million MT) of maize from farmers. **Mozambique** saw the sharpest increase of 32.5%, to USD 375/MT, while **Malawi** maintained the highest price levels, rising by 7% to USD 778/MT. In both Mozambique and Malawi, the increases were primarily attributed to supply constraints resulting from limited harvests, signalling tightening market conditions across the region.

Table 10 highlights notable short-term volatility and contrasting longer-term trends in maize prices across Malawi, Mozambique, and Zambia. In **Malawi**, prices rose sharply by 6.65% month-on-month and 31.07% over three months to 1,341.33 MWK/kg, despite being 6.05% and 14.7% lower over six months and year-on-year, respectively, indicating a recent rebound following an earlier decline. **Mozambique** recorded the steepest one-month increase at 32.35%, with a 24.22% rise over three months. However, prices remain 25.1% below levels seen six months and a year ago, likely reflecting earlier supply improvements. **Zambia** showed a modest 7.23% monthly increase, but this remains significantly declined by nearly 50% over the past three to six months and a 28.9% year-on-year drop, suggesting a significant market correction driven by a bumper harvest.

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	1,341.33	6.65	31.07	-6.05	-14.70
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	23.68	32.35	24.22	-25.10	
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	5.98	7.23	-49.70	-43.37	-28.90

Note: Last price is for September 2025, * August 2025, and ** July 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%)

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

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

Rice

Figure 12: National average price spreads for Rice across select Southern African Countries

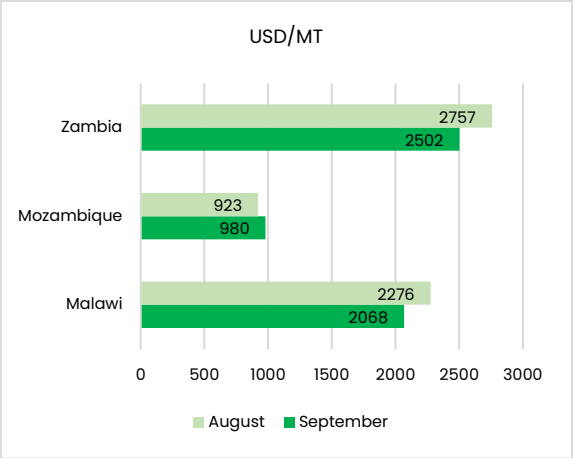


Figure 12 shows the rice price graph in USD, highlighting month-on-month changes across select Southern African countries for September. **Zambia** and **Malawi** recorded rice price declines of 9.25% and 9.13%, respectively, falling to USD 2,502/MT and USD 2,068/MT indicating easing market pressure. In contrast, Mozambique saw a modest 6.17% month-on-month increase to USD 980/MT, suggesting supply constraints. Overall, the data reflect mixed price movements, with regional variations likely influenced by domestic market dynamics and trade flows.

As illustrated in **Table 11**, rice prices in local currency terms show a mixed trend across timeframes. In Malawi, current prices are consistently lower compared with one, three, and six months ago down by 9.42%, 2.96%, and 12.51%, respectively indicating recent market softening. However, prices remain moderately higher year-on-year, up by 5.31%, suggesting underlying inflationary pressures. Similarly, in Zambia prices are consistently lower compared with one, three, and six months ago- declined by 9%, 12% and 3.78% respectively- a clear sign of market softening due to favourable recently concluded seasonal harvest. Conversely, in Mozambique, prices are moderately high month-on-month by 6.24% respectively, although they remain 7.78% and 11.38% lower than three and six months ago, indicating early signs of supply constraints in the market.

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	3,566.67	-9.42 ↓	-2.96 ↘	-12.51 ↓	5.31 ↑
Mozambique	Rice (imported)	National Average, MZN/Kg	61.94	6.24 ↑	-7.78 ↓	-11.38 ↓	
Zambia	Rice (imported)	National Average, Retail, Kwacha/KG	59.32	-9.07 ↓	-12.04 ↓	-3.78 ↘	10.04 ↑

Note: Last price is for September 2025, * August 2025, and ** July 2025

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

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

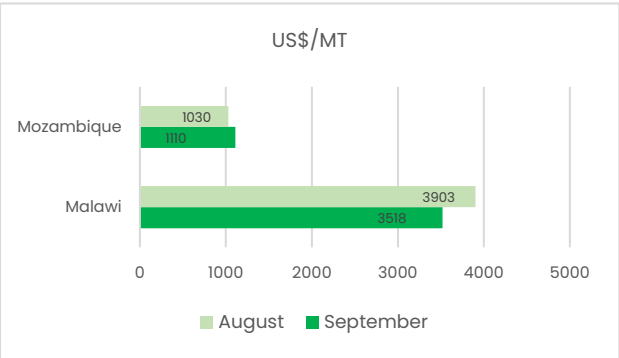

Figure 13 illustrates bean prices in USD/MT across selected Southern African countries. In **Mozambique**, prices rose to USD 1,110/MT in September, a 7.77% increase driven by supply constraints. In contrast, **Malawi** recorded a notable price decline to USD 3,518/MT, a 9.86% decrease, which indicates improved domestic availability. These divergent movements underscore localised market dynamics and have implications for food affordability in the region.

Similarly, **Table 12** further illustrates the local bean prices in these countries. In **Malawi**, month-on-month, prices for beans and soybeans declined by 10.12% and 8.37%, respectively, indicating short-term market softening. However, over longer timeframes, prices remain elevated: local beans increased by 5.4% over six months and 54.07% year-on-year, while soybeans rose by 1.48% and 17.27% over the same periods. In contrast, **Mozambique** bean prices rose 7.77% over the past month, but remain 16.68% lower than three months and 37.30% over the past six months. These movements highlight varying market dynamics and potential implications for regional food trade and price stability.

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

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	6,066.67	-10.12 ↓	12.58 ↑	5.40 ↑	54.07 ⊗
Malawi	Soyabeans	National Average, MWK/Kg	2,433.33	-8.37 ↓	17.27 ⊗	-1.48 ↘	6.57 ↑
Mozambique	Beans	National Average, MZN/Kg	70.13	7.77 ↑	-16.68 ↓	-37.30 ↓	

Note: Last price is for September 2025, * August 2025, and ** July 2025

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Fertiliser

Fertiliser price trends in Malawi and Mozambique suggest diverging market conditions with important implications for agricultural planning. In **Malawi**, both NPK and urea have risen sharply over the past 1 - 6 months, with NPK rising by +24.23%, +27.17%, and +61.26% while urea rose by +22.34%, +36.01%, and +52.86% compared with the past one, three and six months respectively. Notably, urea prices have more than doubled year-on-year (+104.36%) indicating rising input costs that could strain smallholder farmers and reduce fertiliser uptake, whereas NPK shows a dramatic 14.9% drop over the same period. In **Mozambique**, NPK prices have increased modestly across all timeframes, with a +15.17% rise over three months and +13.04% over six months. These trends imply that while Mozambique may maintain steady input access, Malawi could face challenges in affordability and distribution, potentially affecting crop yields and food security during the upcoming agricultural season.

Table 13: Percentage changes in fertiliser prices in Southern Africa[32]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	NPK	National Average, MWK/Kg	4,010.00	24.23 ⊗	27.17 ⊗	61.26 ⊗	-14.93 ↓
Malawi	Urea	National Average, MWK/Kg	3,833.33	22.34 ⊗	36.01 ⊗	52.86 ⊗	104.36 ⊗
Mozambique	NPK	National Average, MZN/Kg	71.21	2.65 ▲	15.17 ⊗	13.04 ↑	
Mozambique	Urea	National Average, MZN/Kg	62.97	-0.10 ↘	28.74 ⊗	-0.04 ↘	

Note: Last price is for September 2025, * August 2025, and ** July 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%)

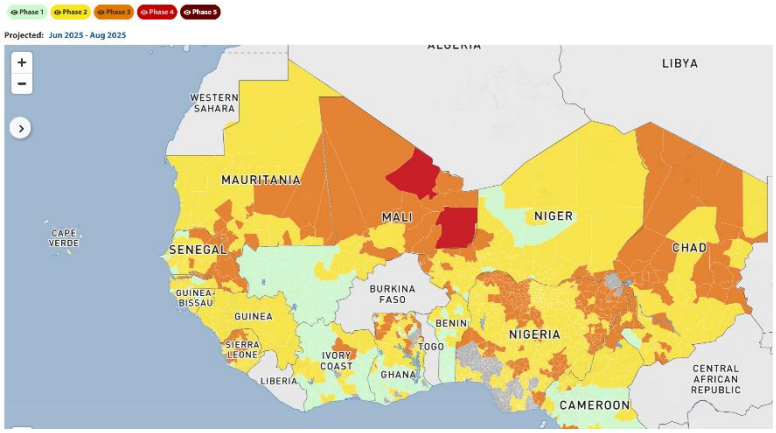
Seasonal Monitor and Cropping Conditions

Across **Southern Africa**, the 2025/26 agricultural season is beginning under atypical conditions, marked by an early onset of the lean season. Land preparation for main season cereals is currently underway, with planting expected to commence in October. Forecasts indicate above-average precipitation through March 2026, particularly in central and southern areas, driven by a likely *La Niña* event. In **Zambia**, production prospects have increased compared to initial estimates, but reduced planted area, ongoing electrical challenges, and reduced water availability may result in some production declines. In **Zimbabwe**, wheat harvesting is underway, with the La Niña event expected to support above-average maize yields in the country. In **Malawi**, above-average rainfall is forecasted in the southern region between October 2025 and March 2026, supporting a timely onset of the 2025/26 agricultural season. This favourable outlook is expected to stimulate typical agricultural labour demand and improve planting conditions. As a result, crop performance and overall food availability in the region are likely to benefit, contributing positively to seasonal agricultural outcomes.

[31] Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia
[32] Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

West Africa Food Security Update

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



In **Burkina Faso,** poor households in conflict-affected areas such as Sebba and Arbinda continue to face severe food consumption deficits due to market disruptions and limited humanitarian assistance.[33] In Sebba, many resort to negative coping strategies like begging and crop theft. In contrast, areas like Diapaga, Djibo, Titao, Markoye, and Gorom-Gorom experience relatively better food access through market availability, subsidised cereal sales, food aid, and local harvests. However, low incomes from informal activities such as selling water and firewood, gold panning, and remittances still limit food access, forcing households to reduce meal frequency and portion sizes. Nationally, food consumption is expected to improve between October 2025 and January 2026 due to increased household production, but in insecure municipalities, harvests will remain below normal, leading to early depletion of stocks and harmful coping mechanisms.

In **Mali,** rising insecurity across southern and western regions, including Gao, Kidal, Ménaka, San, and northern Ségou and Koulikoro, is disrupting economic activities, market supply chains, and forcing population displacement.[34] Households are losing property and income sources, reducing their ability to meet basic needs. Since early September, JNIM-imposed blockades on key fuel and food corridors have led to transport destruction, likely driving up commodity prices and weakening the national economy. The influx of Burkinabe refugees, especially in Koro, where numbers have nearly doubled since April 2025, is straining already limited resources. Despite these challenges, seasonal improvements in food access are emerging in southern agricultural zones due to green harvests of maize, legumes, fonio, and wild products. From October, harvests and falling food prices will support average household access to food, reducing humanitarian needs except in insecure areas where assistance remains critical. The agricultural season is generally average, but reduced cultivated areas, input shortages, and pest damage are expected to lower yields in key production zones and insecure regions. Market supplies are adequate in most areas, but blockades in Ménaka and Kidal limit access and drive-up prices - grain costs are up 92% in Kidal and 47% in Ménaka.

In **Niger** acute food insecurity remains concentrated in conflict-affected regions of Tillabéry, Diffa, Tahoua, Maradi, and Dosso, where displacement and reduced access to food and income persist.[35] Abandonment of fields in 126 farming villages has lowered agricultural production and demand for labour, limiting household income. While seasonal improvements in food availability and income from harvests are expected from October, insecurity continues to drive critical food needs in these areas. Flooding in September worsened the situation, affecting over 268,000 people, damaging 6,500 hectares of crops, and causing livestock losses. Despite localised crop damage, overall yields are expected to be satisfactory due to favourable rainfall, with crops reaching maturity in major agricultural zones. New harvests of millet, sorghum, cowpeas, and peanuts are boosting market supply and easing consumer demand. Food prices have dropped by 10–15% since July and by 20–30% compared with the five-year average, improving access for households. The start of cash crop harvesting is also generating income and increasing demand for agricultural labour. However, in flood- and conflict-affected areas, acute food insecurity remains high due to disrupted livelihoods and limited recovery capacity.

In **Nigeria**, food insecurity remains a major concern, with approximately 30.6 million people classified in Crisis or worse (IPC Phase 3 or above).[36] This includes large populations in the north-east and north-west regions facing acute malnutrition, driven by poor food consumption, inadequate health services, and ongoing conflict-related displacement. In **Ghana**, around two million people are experiencing Crisis-level food insecurity (IPC Phase 3 or above), reflecting persistent vulnerabilities despite relatively stable conditions in other parts of the country.[37] Both

[33] https://fews.net/west-africa/burkina-faso
[34] https://fews.net/west-africa/mali
[35] https://fews.net/west-africa/niger
[36] https://www.ipcinfo.org/ipcinfo-website/ipc-dashboard/
[37] Ibid

countries continue to require targeted interventions to address food access, nutrition, and livelihood recovery.

Prevalence of Insufficient Food Consumption

In September 2025, the number of people experiencing insufficient food consumption (IFC) across seven West African countries varied significantly, with no change reported from the previous month. The total number affected was approximately 118 million, reflecting a complex and uneven food security landscape across West Africa. Niger recorded the highest proportion of its population facing IFC, at 76.6%, with 21.4 million people affected. This marks a 25.9% increase compared with two years ago, highlighting deepening vulnerability. Mali and Burkina Faso also reported alarmingly high rates, with 52.4% and 46.5% of their populations affected, respectively, although both showed only modest increases over two years. Ghana experienced a sharp deterioration, with 24% of its population affected, an increase of 64.7% from last year and 68% over two years. Togo followed a similar trend, with 27.8% of its population facing IFC, up 42.1% from last year and 80% over two years.

In contrast, Nigeria, despite having the largest affected population at 56.4 million, showed notable improvement. The proportion of people facing IFC declined by 46.2% from last year and 24.9% over two years, suggesting positive developments in food access. Côte d'Ivoire had the lowest proportion among the group at 15.6%, though it experienced a 41.7% increase over two years. These trends underscore the urgent need for targeted and sustained interventions, particularly in Niger, Mali, Burkina Faso, Ghana, and Togo, where food insecurity remains high or has sharply worsened. At the same time, the improvements seen in Nigeria offer valuable lessons for regional efforts to strengthen food systems and resilience.

Table 14: Prevalence of Insufficient Food Consumption in selected West African countries (September 2025)[38]

Country	Total Population (millions)	People with IFC (millions)*	People with IFC (millions)**	% of total population with IFC	Change in people with IFC from previous month (%)	Change in people with IFC 1 year ago	Change in people with IFC from 2 years ago
Burkina Faso	19.8	11.20	11.20	46.5	0.00	0.00	3.70
Cote d'Ivoire	29.4	5.10	5.10	15.6	0.00	0.00	41.67
Ghana	29.8	8.40	8.40	24.0	0.00	64.71	68.00
Mali	19.1	13.20	13.20	52.4	0.00	0.00	3.94
Niger	25.9	21.40	21.40	76.6	0.00	0.00	25.88
Nigeria	202.8	56.40	56.40	23.7	0.00	-46.23	-24.90
Togo	7.9	2.70	2.70	27.8	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.

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

	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.

Maize

Figure 15: Price spreads for maize across select West African Countries[39]

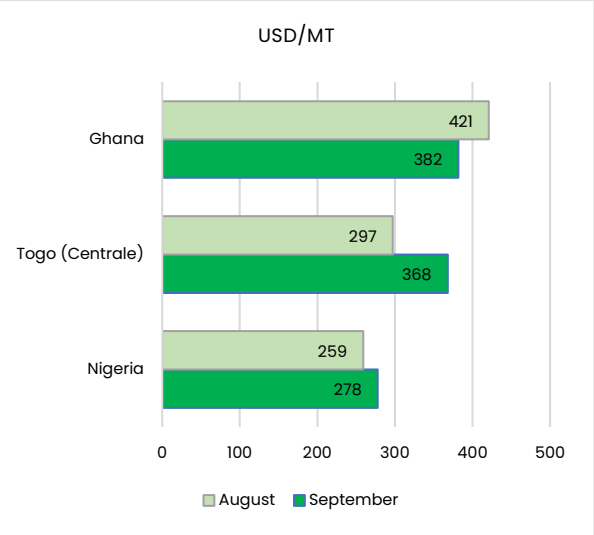


Figure 15 illustrates maize price trends in USD across selected West African countries, showing varied month-on-month movements. In Ghana, prices fell to USD 382/MT in September, a 9.26% decline. In contrast, Togo (Centrale) saw a 24% surge to USD 368 /MT, suggesting localised market pressure or tightening supply. Similarly, Nigeria recorded a 7.34% increase to USD 278/MT, indicating localised market pressure and supply constraints.

Table 15 further highlights varied trends in maize prices in local currencies across three selected West African countries. In **Ghana**, prices have steadily declined, falling by 4.37% month-on-month, 25.28% over three months, and 29.38% over six months, indicating easing market pressures likely driven by improved domestic supply. Ghana's prices show a moderate to significant decline compared to the previous 1-6months, with prices dropping by 4.37% month-on-month to 29.38% over six months. These low prices are direct implications of the country's favourable seasonal harvests, with the Government, through the Ministry of Food and Agriculture, providing sufficient resources to the National Food Buffer Stock Company (NAFCO) to purchase surplus produce for storage as the country anticipates a bumper grain harvest in the 2025 season. In **Nigeria,** maize prices in USD show a mixed pattern—3.46% higher month-on-month, but significantly lower than previous quarters (down 25.32% over three months and 22.66% over six months), suggesting a short-term price shock amid broader market stabilisation. **Togo**'s maize market reveals regional disparities: Maritime maintains consistently low prices, down 46.86% year-on-year, while Savanes shows a slight 0.52% monthly uptick despite long-term declines. Meanwhile, Centrale exhibits erratic pricing, with current levels up 9% compared to six months ago, pointing to heightened market instability. These variations underscore localised supply-demand dynamics and the need for targeted market monitoring to inform trade and food security interventions.

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	4,716.79	-4.37 ↘	-25.28 ↓	-29.38 ↓	
Nigeria	Maize (white)	National Average, NGN/KG	412.33	3.46 ▲	-25.32 ↓	-22.66 ↓	
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg*	206.00	23.35 ⊗	-13.81 ↓	-10.04 ↓	-29.69 ↓
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	276.00	1.47 ▲	3.37 ▲	9.09 ↑	
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg*	161.00	-27.48 ↓	-29.07 ↓	-25.12 ↓	-46.86 ↓
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg*	195.00	0.52 ▲	-7.58 ↓	-15.95 ↓	-14.10 ↓

Note: Last price is for September 2025, * August 2025, and ** July 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%)

[39] These price spreads are calculated based on online rates 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 Togo

Rice

Figure 16: Price spreads for rice across select West African Countries[41]

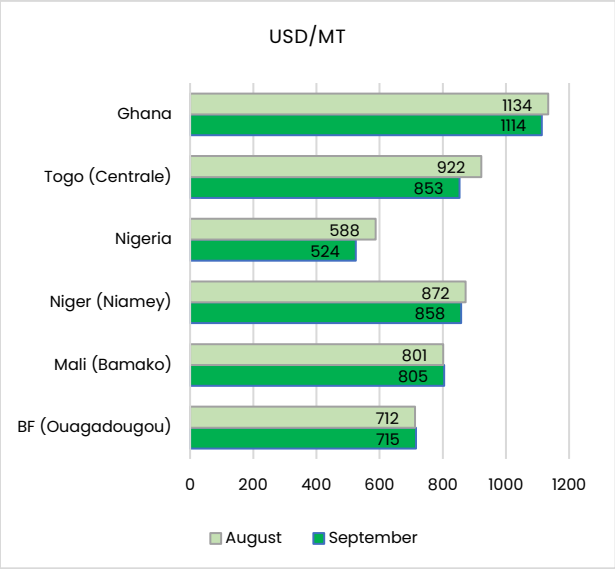


Figure 16 illustrates rice price movements in USD across six West African countries, showing a general downward price trend month-on-month, with one exception. **Ghana** saw a modest decline of 1.76% to USD 1,114/MT, while **Togo** (Centrale) recorded a sharper drop of 7.48% to USD 853/MT. **Nigeria** experienced the steepest decline, falling by 10.88% to USD 524/MT, reflecting improved supply in the market. **Niger** (Niamey) had a slight decrease of 1.60%, while **Mali** (Bamako) and **Burkina Faso** (Ouagadougou) were the only countries to register a slight price increase, of 0.4% to USD 805/MT and USD 715/MT due to currency appreciation.

Table 16 further reveals a general trend of stabilising or declining rice prices in local currency terms across most observed markets, with very few exceptions. In **Ghana**, current prices are 3.7% higher month-on-month but remain 6–12% lower compared to the past three to six months, indicating recent supply constraints amid longer-term easing. In **Burkina Faso**, imported rice prices declined across major wholesale markets by approximately 2–3% month-on-month, 4–6% over three months, 5–7% over six months, and 7–9% year-on-year, reflecting improved supply conditions or reduced demand. Similarly, in **Mali**, wholesale prices fell across regions such as Kayes, Mopti, and Sikasso, with declines reaching up to 14.75% year-on-year in Kayes. **Togo**'s markets a relatively down and stable, except Maritime, where the current retail price is relatively high by 17.7% month-on-month, 9- 12% over three months. These widespread reductions suggest a broader regional trend of softening rice prices, driven by favourable import conditions, seasonal availability, or subdued consumer demand.

Table 16: Percentage changes in rice prices in West Africa[42]

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	6.25	1.19
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	0.00	-9.09
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	45,000.00	-6.25	-19.64	-19.64	-16.67
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	0.00	-10.00	-10.00	7.14
Burkina Faso	Rice (imported)	Kongoussi, Wholeslae, XOF/100 kg	50,000.00	-9.09	-16.67	-16.67	0.00
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	40,000.00	0.00	-2.44	-13.04	-20.00
Ghana	Rice	National Average, (GHS/MT)	13,765.63	3.70	-12.34	-6.04	
Mali	Rice	Bamako, Wholesale, XOF/100 KG	45,000.00	0.00	0.00	-6.25	-10.00
Mali	Rice	Gao, Wholesale, XOF/100 KG	65,000.00	0.00	0.00	0.00	-7.14
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	0.00	0.00	-3.70	19.54
Mali	Rice	Mopti, Wholesale, XOF/100 KG	48,000.00	-2.04	0.00	-2.04	-4.00
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	42,500.00	-5.56	-5.56	-10.53	-17.48
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	41,000.00	-2.38	-8.89	-14.58	-21.15
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	56,000.00	0.00	-6.67	-6.67	-15.15
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	32,500.00	-1.52	-14.47	-15.58	-39.81
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	45,000.00	-10.00	-6.25	-10.00	-14.29
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	45,000.00	-6.25	0.00	-13.46	-14.29
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	520.00	0.00	0.00	-21.21	-18.75
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	520.00	0.00	10.64	-13.33	-21.21
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	460.00	-4.17	-4.17	-11.54	-28.13
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	480.00	-2.04	0.00	-14.29	-25.00
Nigeria	Rice (milled)	National Average, NGN/KG	777.82	-14.02	-29.13	-23.06	
Togo	Rice (imported)	Centrale,Retail, XOF/Kg*	477.00	-28.81	-4.98	-5.17	-6.10
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	625.00	0.97	-5.02	-5.73	
Togo	Rice (imported)	Maritime,Retail, XOF/Kg*	572.00	17.70	11.72	9.16	-6.84
Togo	Rice (imported)	Savanes,Retail, XOF/Kg*	458.00	-1.51	-9.13	-15.03	-32.55

Note: Last price is for September 2025, * August 2025, and ** July 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 on the last day of the month 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

Millet

Figure 17: Price spreads for millet across select West African Countries[43]

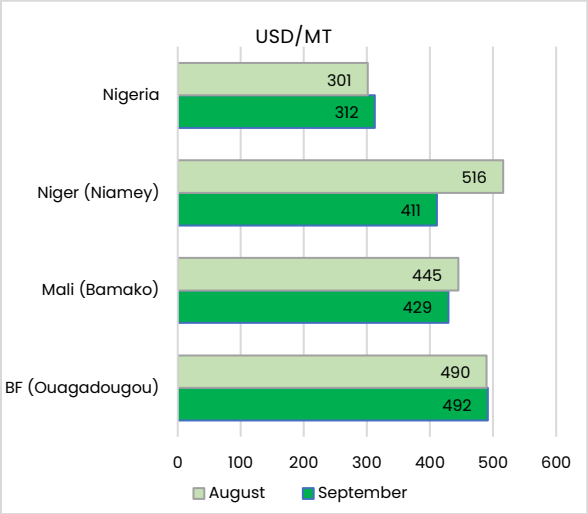


Figure 17 shows mixed month-on-month movements of millet prices in USD across selected West African countries. **Nigeria** recorded a modest increase of 3.65%, with prices rising to USD 312/MT, suggesting an increase in localised demand resulting in supply constraints. In contrast, **Niger** (Niamey) experienced a sharp decline of 20.35%, dropping to USD 411/MT, reflecting improved supply and reduced market pressure. **Mali** (Bamako) saw a slight decrease of 3.6%, to USD 429/MT, while **Burkina Faso** (Ouagadougou) stabilised with a marginal increase of 0.41%, to USD 492/MT, due to currency appreciation.

Furthermore, **Table 17** shows that prices across Burkina Faso, Mali, Nigeria, and Niger show varied trends. **Burkina Faso** markets like Dédougou and Dori have seen steep year-on-year declines, while Bobo Dioulasso remains stable, indicating localised resilience. **Mali** presents a mixed picture, with Kayes and Sikasso showing month-on-month price spikes by 7% and 10% respectively, amid broader declines. **Nigeria**'s national average price is relatively stable in the short term but has dropped by 20% compared to the past six months. In contrast, **Niger**'s current prices in all wholesale markets are significantly lower across all timeframes, with Maradi, Tahoua, and Niamey recording dramatic year-on-year declines of up to 56%. These price trends highlight diverging millet price trajectories across West Africa, with Burkina Faso and Niger facing pronounced declines, while Mali and Nigeria show mixed or localised resilience.

Table 17: Percentage changes in millet prices in select West African Countries[44]

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	0.00	0.00
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	25,000.00	-16.67	-16.67	-23.08	-37.50
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	37,000.00	-2.63	-7.50	-9.76	-22.11
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	29,000.00	-9.38	-12.12	-12.12	-13.43
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	37,500.00	-11.76	-11.76	-11.76	-11.76
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	27,500.00	0.00	-12.70	-19.12	-27.63
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg	37,500.00	-6.25	-13.79	-6.25	-16.67
Mali	Millet	Bamako, Wholesale, XOF/100 KG	24,000.00	-4.00	-12.73	-25.00	-33.33
Mali	Millet	Gao, Wholesale, XOF/100 KG	32,500.00	-7.14	-13.33	-13.33	-31.58
Mali	Millet	Kayes, Wholesale, XOF/100 KG	30,000.00	7.14	0.00	-14.29	-25.00
Mali	Millet	Mopti, Wholesale, XOF/100 KG	27,000.00	-3.57	-6.90	-15.63	-32.50
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	27,500.00	10.00	-8.33	-15.38	-29.49
Niger	Millet	Agadez, Wholesale, XOF/Kg	327.50	-18.13	-18.13	-18.13	-34.50
Niger	Millet	Dosso, Wholesale, XOF/Kg	220.00	-18.52	-12.00	-22.81	-50.00
Niger	Millet	Maradi, Wholesale, XOF/Kg	190.00	-9.52	-25.49	-30.91	-56.32
Niger	Millet	Niamey, Wholesale, XOF/Kg	230.00	-20.69	-19.30	-23.33	-46.51
Nigeria	Millet	National Average, NGN/KG	463.35	0.06	-20.29	-20.85	

Note: Last price is for September 2025, * August 2025, and ** July 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

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries[45]

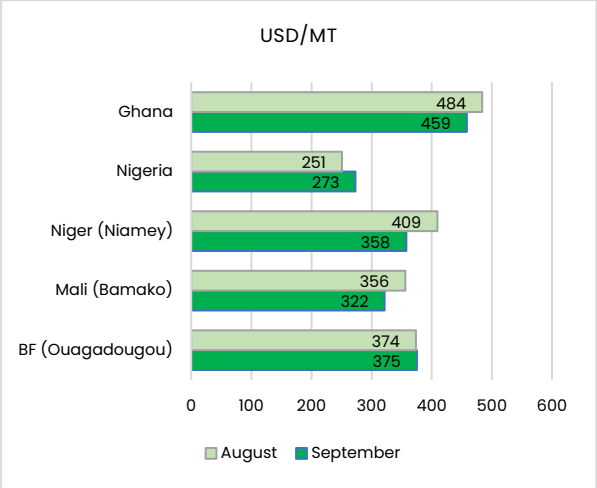


Figure 18 illustrates sorghum price movements in USD/MT across five West African markets for September, with all but one market showing declines and stability month-on-month. **Ghana** recorded a 5.17% decrease to USD 459/MT, while **Niger** (Niamey) and **Mali** (Bamako) saw sharper declines of 12.47% and 9.55% to USD 358/MT and USD 322/MT, respectively. In contrast, **Nigeria** experienced an 8.76% increase to USD 273/MT due to supply constraints and currency depreciation, while **Burkina Faso** (Ouagadougou) remained stable with a marginal 0.27% increase. These price movements reflect mixed market dynamics, with most countries showing downward trends, while Nigeria and Burkina Faso exhibit signs of resilience and strengthening market demand.

Table 18 mirrors USD price trends in local currencies, with the majority of the markets showing price declines and stability, except Nigeria, which showed a positive short-term trend, with a +5.05% month-on-month increase. In **Burkina Faso**, most markets experienced declines, with Dédougou dropping sharply by -16.00% month-on-month and Ouagadougou by -8.70%, while Bobo Dioulasso saw a slight three month increase of +2.27%. **Ghana**'s national average remained unchanged over the past month but fell by -11.98% over three months. **Mali** presents a mixed picture, with Gao recording a strong price increase of +12.90% contrasting with Bamako's -14.29% decline over three months. In **Niger**, Agadez experienced a sharp monthly decline of 18.50%, reflecting heightened market volatility influenced by recent trader destocking and government-subsidised sorghum sales[46]. These developments point to softening market conditions across the region, with most areas maintaining price stability due to increased supply. This supply boost is largely attributed to active destocking by traders and producers, supported by the generally favourable progress of the 2025 agricultural season.

Table 18: Percentage changes in sorghum prices in select West African countries [47]

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	2.27	-4.26	-10.00
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	21,000.00	-16.00	-16.00	-17.65	-30.00
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	29,000.00	-12.12	-14.71	-17.14	-22.67
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	25,000.00	-3.85	-7.41	-3.85	-24.24
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	0.00	-16.67	0.00	-16.67
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	21,000.00	0.00	-17.65	-23.64	-26.32
Ghana	Sorghum	National Average, (GHS/MT)	5,666.67	0.00	-11.98	-11.07	
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	18,000.00	-10.00	-14.29	-28.00	-50.00
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	35,000.00	0.00	12.90		
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	24,000.00	-4.00	-4.00	-4.00	-31.43
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	22,000.00	-4.35	-8.33	-8.33	-31.25
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	20,000.00	0.00	-9.09	-11.11	-27.27
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	326.00	-18.50	-18.50	-9.44	-30.64
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	240.00	-4.00	-4.00	-14.29	-40.00
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	175.00	-12.50	-20.45	-25.53	-53.95
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	200.00	-13.04	-20.00	-28.57	-57.45
Nigeria	Sorghum (white)	National Average, NGN/KG	405.22	5.05	-10.57	-17.26	

Note: Last price is for September 2025, * August 2025, and ** July 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%)

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

[46] See Food Price Monitoring and Analysis (FPMA) Bulletin #7, 11 September 2025

[47] 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[48]

Harvesting of main season cereals is either complete or nearing completion across much of **West Africa**, with agro-climatic conditions generally favourable and near-average yields expected in most areas. However, conflict-affected regions continue to face challenges, and localised areas are experiencing either below-average rainfall or excessive rains and flooding. In **Nigeria**, flooding has caused extensive damage, particularly along the Niger, Benue, Sokoto, and Komadugu rivers, affecting an estimated 48,447 hectares of farmland. Similarly, in central **Mali**, northern **Burkina Faso**, and western **Niger**, yields are projected to remain below pre-conflict levels, with elevated rainfall increasing flood risks. In **Ghana**, flooding in the north-eastern regions is displacing communities and threatening standing crops, posing risks to the current agricultural season. These developments underscore the uneven impact of climatic conditions across the region, with flooding emerging as a key threat to agricultural productivity in several areas.

[48] EarlyWarning_CropMonitor_202510.pdf

Food Trade Updates

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, September 2025

Kenya

Kenya has officially joined Tanzania in implementing a container guarantee system, effectively eliminating the long-standing requirement for cash deposit guarantees on cargo containers. This marks a significant step towards streamlining trade across the region. With the adoption of the container guarantee service at the ports of Mombasa and Lamu, importers can expect a smoother and more cost-effective process. Major cargo handlers have already embraced the new system, replacing traditional cash deposits and paving the way for more efficient port operations.

West 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, September 2025

Nigeria

The Nigeria Customs Service (NCS) has rolled out a new policy exempting imports valued at US$300 or less from duties and taxes. This initiative is designed to streamline trade processes, encourage cross-border e-commerce, and reduce operational costs for businesses. Effective from 8 September 2025, the US$300 de minimis Threshold applies to goods arriving through express delivery services or as part of passenger baggage. However, the exemption does not cover items that are prohibited or restricted under Nigerian import regulations.

Ghana

The Ministry of Food and Agriculture projects a bumper grain harvest for the 2025 season, coupled with unsold carry-over stocks from the 2024 yield. To manage the anticipated surplus and prevent market oversupply, the Government of Ghana has, for the first time since the establishment of the National Food Buffer Stock Company (NAFCO), allocated substantial resources to support the purchase and storage of excess produce. This proactive intervention is expected to minimise post-harvest losses while ensuring the availability of strategic food reserves. It also strengthens national food security by providing a buffer against future shortages and emergencies.

Special Feature

Monitoring Food Policy and Trade Developments

Southern and West Africa

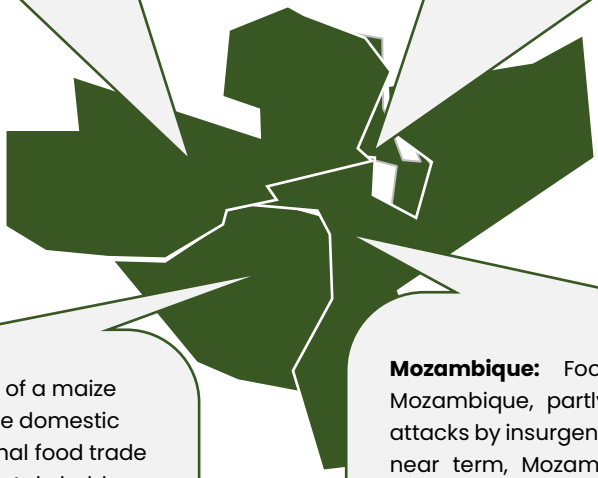
Monthly Summary

August 2025

Executive summary of monthly findings
Southern Africa Snapshot

Zambia: Plans to export surplus maize is a positive step for regional food security, although new food production partnerships with Gulf countries may complicate efforts to deepen regional trade integration over the medium term. AGRA can help push for permanent trade mechanisms that ensure consistent cross-border flow of staple crops across multiple agricultural cycles.

Malawi: Malawi continues to suffer from food shortages, as the harvest season closed with lower-than-average yields, and undersupply in the market (combined with bulk purchasing by politicians) is compounding the existing food price inflation crisis. The election continues to drive decision- and policymaking on food security. this This trend is illustrated by the government's refusal to release the 2025 MVAC report, which is typically used by donor partners to determine support needed to stock the food reserve. While not unusual in an election year, government's reticence to make accurate food supply data available underscores how maize politicization impedes food security.



Zimbabwe: The reimposition of a maize import ban is likely to stabilise domestic food prices but disrupt regional food trade systems. AGRA can facilitate stakeholder discussions to support the development of consistent policies that private stakeholders and regional partners can rely on, thus, facilitating increased engagement in the sector.

Mozambique: Food insecurity is worsening in Mozambique, partly due to an increase in armed attacks by insurgents in the north of the country. In the near term, Mozambique will be heavily reliant on donor support to meet food needs. However, there is a reluctance from donors to commit funds over ongoing concerns over government's response to political protests. Beyond this, food and agriculture policies such as the PESAN 2024-2030 strategy and National Nutrition Strategy are progressing slower than expected.

Key findings

Country	Food trade	Food Security	Government Response	Stakeholder Initiatives
Malawi	Grain prices are higher in Malawi than elsewhere in the region, with imports required to meet domestic deficits. While there is no formal export ban, the government continues to use export permits to restrict formal trade flows in maize. Traders continue to show a preference for unregulated trading routes due to better forex exchange rates on the black market.	The harvest season is coming to an end with below average yields, particularly affecting those in the Southern Region, further driving food price inflation. The upcoming post-harvest season is projected to experience food shortages sooner than usual.	Preoccupied with the upcoming general elections, the government is not prioritising sustainable food sector policymaking. The failure to release the MVAC report has delayed donor funding for food security initiatives. Neither the incumbent government nor opposition candidates have put forward a clear plan to address the current maize deficit.	Donors are playing an important role, both in the immediate supply of food aid (through the WFP) and by funding the research and development of climate resilient and sustainable farming solutions to support future food security in Malawi.
Mozambique	Mozambique's attempt to strengthen a trade partnership with Zimbabwe is experiencing limited success due to negative perceptions among local population. Underdeveloped food trade infrastructure is highlighted as a major issue.	Two million people are currently classified as food insecure. This figure is likely to worsen in the post-harvest season.	The government is reliant on donor funding for flagship initiatives such as the nutrition programme, which constrains its potential to scale. Agriculture financing policies are not politically feasible in the near term due to a lack of government prioritisation and disagreements within the ministry of agriculture. However, the government is demonstrating a proactive stance on rice value chain development.	International donors have been withholding funds since the post-election protests and violence beginning October 2024. Private sector investors are not currently incentivised to invest in the country.
Zambia	Zambia's decision to export surplus maize will likely strengthen regional trade, particularly with the DRC, while agriculture deals with several Middle Eastern countries may affect food	Surplus maize indicates adequate domestic availability, although inefficiencies in FRA's post-harvest crop collection could undermine food security.	Plan to export surplus maize reflects desire to receive foreign currency liquidity, but government will likely be cautious in implementation given public concerns over food security.	Private stakeholders seek to establish a common voice in response to unpredictability of state agriculture policies, which is inhibiting private sector engagement.

	trade in the long term.			
Zimbabwe	Reimposition of maize import ban will likely disrupt efficiency of regional food trade system, with exporters South Africa and Zambia most likely to be affected.	Increased maize output of 1.3 million MT this campaign along with GMB reserves will be sufficient to cover national consumption.	Unpredictable policies adversely impact long-term planning of private sector who could be vital in the encouraging the growth of Zimbabwe's agriculture sector.	Private associations have limited influence in relation to development of agricultural policies. Little stakeholder developments in the sector over the past month.

Executive summary of monthly findings
West Africa Snapshot

Mali: Food insecurity remains severe, exacerbated by intensifying floods and ongoing conflict that continues to disrupt agricultural production and trade. The government's food insecurity response plan, alongside NGO initiatives, will be inadequate to comprehensively address the crisis due to limited funding and the exclusion of conflict-affected areas from food assistance programs. At the same time, the government's drive to promote economic sovereignty – evidenced by its assumption of full control over a domestic agricultural bank – is likely to impact the flow of finance within the agriculture sector, due to reduced external investment and increased exposure to corruption risks.

Niger: Niger faces compounding shocks from escalating conflict and severe flooding driving acute displacement across key agricultural zones. The military government has launched ambitious interventions to address the food crisis, including national food reserve destocking and large-scale irrigation programs, but implementation gaps persist due to inadequate supervision capacity and insecurity limiting remote area access. At the same time, international assistance is severely constrained due to systematic barriers. AGRA can support conflict-sensitive programming and local capacity building while maintaining relationships during this challenging period.

Ghana: Grain export restrictions remain in place (to the benefit of agro-processors), whilst new institutional frameworks show policy ambition but reveal misalignment between commercial priorities and immediate food security needs. Plus, implementation delays on key programmes like Farmer Service Centres raise questions over delivery capacity. Donor initiatives, including GSS-WFP mapping and World Bank financing, are creating opportunities for AGRA to support evidence-based policy reform and address fundamental constraints.

Key findings

Country	Food trade	Food Security	Government Response	Stakeholder Initiatives
Ghana	Export ban remains in place with government officials indicating potential removal by November 2025, contingent on harvest outcomes, though comprehensive production data remains unavailable.	Food availability outcomes remain unclear due to limited official production data following export restrictions. Food affordability impacts on vulnerable populations are uncertain despite increased local grain supply.	New institutional frameworks show ambition but reveal misalignment between commercial priorities and immediate food security needs. Limited targeted support for food-insecure households affected by broader agricultural policy changes, with institutional focus remaining on commercial crop financing rather than nutrition-specific interventions.	GSS-WFP comprehensive food security mapping should lead to evidence-based policy reform. World Bank's US$125 million Food System Resilience Programme provides substantial financing. International development organisations facilitate regional trade coordination discussions through AfCFTA framework.
Mali	Attacks from insurgents, military operations and curfews continue to constrain food trade activity, even in southern regions such as Kayes and Sikasso, which had thus far remained relatively unaffected.	Food insecurity, compounded by increasing impacts from conflict and nationwide flooding, continues to be severe (1.4 million people require emergency food assistance).	Government's response plan is inadequate in addressing the food crisis in Mali, with the state continuing to neglect conflict-affected zones by channelling food assistance into secure, urban areas in the south.	A pilot scheme, undertaken by NGO partners, aims to rehabilitate and develop critical agricultural infrastructure that will have long-term food security benefits.
Niger	Market access severely disrupted by conflict in key farming corridors (Tillabéri, Diffa) and flood damage to transport infrastructure. While overall markets remain "well-supplied," these issues create constraints on flows to western markets, making supply unreliable despite adequate national stocks.	Food access at lowest levels due to compounding shocks of conflict and flooding. Over 110,000 people are affected by floods alone, with 2,051 hectares of crops destroyed. Conflict prevents farming in 149 villages, while displacement and market disruptions affect millions during peak hunger season.	CNSP launches ambitious 60,000 MT OPVN destocking program with fixed pricing and dual distribution channels. However, implementation faces significant gaps due to inadequate supervision capacity, cultural resistance to oversight, and persistent insecurity limiting access to remote areas where most farmers are located.	Operating environment severely constrained with no new donor or NGO interventions announced despite escalating needs. Target population for humanitarian assistance reduced from 1.1 million to 347,525 due to funding constraints. Government suspicion has led to the expulsion of multiple NGOs, with remaining organisations facing tight controls and surveillance, creating systematic barriers to international assistance.

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

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