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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 57th edition overviews the food security situation and market prices across East, South, and West Africa.

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

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Summary

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

Food Commodity Prices Updates

In **East Africa,** Kenya reports the highest prices in USD across the four monitored commodities, with maize reaching USD 483/MT, reflecting a 7% month-on-month increase due to reduced domestic supply and increased demand from animal feed millers for the same maize[1]. As a result, the Kenyan Government approved importation of 5.5 million bags of yellow maize with 50% import duty waiver designated exclusively for animal feeds production[2] to ease the pressure. Ethiopia, on the other hand, recorded the lowest maize price among the five East African countries at USD 281/MT, while Tanzania saw a slight price decline of 4% to USD 307/MT, largely attributed to currency depreciation and the release of carryover stocks from the previous season. These price fluctuations were primarily driven by stock shortages resulting from seasonal variations and heightened demand for maize from the southern region. Additionally, concerns persist regarding future food crop commodity prices due to dry conditions affecting main season crops in parts of Uganda, Kenya, Somalia, Rwanda, and Burundi.

In **Southern Africa**, maize prices have declined across Zambia, Malawi, and Mozambique, primarily due to an influx of the newly harvested crop, which has increased market supply and driven price reductions. Malawi experienced a significant 44% month-on-month price drop in USD, marking a notable shift for a country that had previously encountered steep price increases. Likewise, Zambia and Mozambique recorded declines of 12% and 10%, bringing maize prices to USD 325/MT and USD 451/MT, respectively. Despite this overall downward trend, Malawi continues to report the highest maize price among the three countries, standing at USD 543/MT.

In **West Africa**, maize and rice prices in USD rose in general, largely driven by currency depreciation. Despite a cereal export ban, Ghana recorded the highest rice price at USD 1,012/MT, up from USD 948/MT in March 2025. Nigeria posted the lowest rice and maize prices at USD 715/MT and USD 319/MT, respectively. Conversely, Togo has the highest maize price at USD 521/MT, up from USD 495/Mt. The decline in maize prices in Nigeria in USD is also reflective of the trends seen in local currencies, with prices falling by 4.15%, 21.95% and 30.55% over the past one, three and six months, respectively. Nigeria's price decrease is attributable to the Government's issuance of a tariff moratorium on the crop, resulting in an increase in supply from imports. The rising cost of cereals in most parts of the region is driven by multiple factors, such as a weakened national currency, elevated transportation expenses, shortages in cereal production, and market disruptions caused by conflicts in various regions.

Food Security Updates

In **East Africa**, nearly 12.3 million people across Kenya, South Sudan, Tanzania, and Uganda are experiencing Crisis (IPC Phase 3) or worse outcomes, according to the April 2025 report from the East and Central Africa Food Security and Nutrition Working Group (FSNWG). This represents an increase of nearly 2.3 million people over March 2025, driven by the ongoing conflicts, the ongoing influx of returnees from Sudan, and the shifting funding landscape caused by USAID funding cuts, which is impacting the food and nutrition security situation in the country. Meanwhile, the number of people facing an insufficient food consumption (IFC) situation across Kenya, Rwanda, South Sudan, Tanzania, and Uganda remain unchanged for the past three consecutive months, at 45.3 million people. Similarly, in **Southern Africa**, the number of people facing IFC situation across Malawi, Mozambique, Zambia, and Zimbabwe has remained unchanged at 22.2 million in April. The current state of insufficient food consumption, however, remains below what was recorded in April 2024.

In **West Africa**, the number of people facing IFC across seven countries -Burkina Faso, Ghana, Côte d'Ivoire, Mali, Niger, Nigeria, and Togo- has significantly dropped by 16.1 million people, mainly driven by 16.28% reduction in Nigeria. As a result, the current level of IFC across the seven West African countries is lower than the 158.5 million reported in April 2024. Nonetheless, the Cadre Harmonisé (CH) latest assessment for the March–May 2025 period indicates that 36.8 million people are facing food insecurity at CH Phase 3 or above (Crisis and worse), including 1.6 million in Phase 4 (Emergency) - the highest level ever recorded for this time of year. Notable increases in food insecurity were observed in Ghana (+106%), Guinea (+84%), and Côte d'Ivoire (+34%). The CH analysis attributes this worsening situation to a combination of conflict and displacement, economic vulnerability, persistently high food prices, and recent severe flooding. It underscores the urgent need for sustained action, adequate funding, and stronger structural responses to address the growing crisis.

Food Trade Updates

- The African Export-Import Bank (Afreximbank) and Zep Re (PTA Reinsurance company) have launched a new platform, called the Trans-Africa Bond Alliance (TABA) which offers a unified bond system for cross-border traders. The platform aims to enhance the continent's insurance capacity and enable more African businesses to participate in regional trade. With TABA, traders can transport goods using a single transit bond, effectively reducing delays and cutting costs linked to multiple bonds.
- The United States of America, under the administration of President Donald Trump, intends to terminate America's funding for the African Development Fund, the concessional branch of the African Development Bank. This decision, revealed just days before the bank's annual meeting in Abidjan, could lead to significant repercussions.
- Kenya and Ethiopia have signed a groundbreaking agreement to facilitate cross-border trade under the African Continental Free Trade Area (AfCFTA) framework. The deal establishes designated border trade zones—extending 100 kilometres into Kenya and 50 kilometres into Ethiopia, where traders can conduct transactions of up to USD 1,000 per trip, with a limit of four trips per month. Trade within these zones will be restricted to a jointly approved list of goods.
- Malawi and Tanzania have lifted reciprocal trade restrictions that had affected the flow of agricultural goods between the two countries. In March, Malawi imposed bans on several Tanzanian agricultural products, including rice, flour, ginger, bananas, and maize. In retaliation, Tanzania halted all agricultural imports including restrictions on transit goods. However, following a bilateral diplomatic meeting on 2nd May, Malawi and Tanzania agreed to remove the restrictions, restoring the free movement of goods across their borders.
- Nigeria has formally gazetted and submitted its ECOWAS Schedule of Tariff Offers for Trade in Goods under the African Continental Free Trade Area (AfCFTA) to the AfCFTA Secretariat. This gazetted schedule lays the groundwork for implementing zero tariffs on 90% of tariff lines, enhancing the competitiveness and market access of Nigerian goods across the African continent.

[1] See https://www.businessdailyafrica.com/bd/markets/commodities/kagwe-allows-imports-as-unga-prices-hit-13-month-high
[2] https://farmersreviewafrica.com/kenya-approves-5-5m-bags-of-yellow-maize-imports-with-50-duty-waiver-to-ease-pressure-on-white-maize/

Introduction

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

Food Security Dashboard

The Food Security Dashboard (**Table 1** and **Figure 1**) offers a summary of the fluctuations in the number of people experiencing Insufficient Food Consumption (IFC)[3], highlights hunger hotspots and tracks average changes in food prices over the past year. **Figure 1** illustrates the prevalence of IFC in April 2025 across 17 countries in Eastern, Southern, and Western Africa.

Over the past twelve consecutive months, Burkina Faso (56.6%), Mali (69.1%), and Niger (82.6%) have consistently remained among the most food-insecure countries in the region, with more than half of their populations experiencing insufficient food consumption (IFC). Meanwhile, South Sudan (44.5%), Uganda (42.2%), and Nigeria (46.6%) are approaching this critical threshold, highlighting the widespread nature of food insecurity across parts of Africa. Nigeria, however, has shown encouraging signs of improvement. For four consecutive months, the country has recorded a steady decline in IFC levels. In April 2025, the number of people facing food insecurity fell by 16.28%, from 94.6 million in March to 79.2 million in April. Compared to the same period last year, this represents a 21.12% year-on-year decrease. Similarly, Zimbabwe experienced a notable reduction in IFC, with an 18.18% decline over the past year. In contrast, several countries have experienced worsening conditions. Ghana, Rwanda, South Sudan, Togo, and Uganda all reported increases in IFC. Uganda recorded the most dramatic rise, with IFC levels surging by 116.87% compared to a year ago. South Sudan, Togo, and Rwanda followed with a 53%, 42% and 38% increase respectively. These deteriorations are largely attributed to ongoing conflicts and insecurity, the influx of returnees from Sudan, economic instability, rising food prices, and reduced humanitarian assistance, particularly as a result of USAID funding cuts.

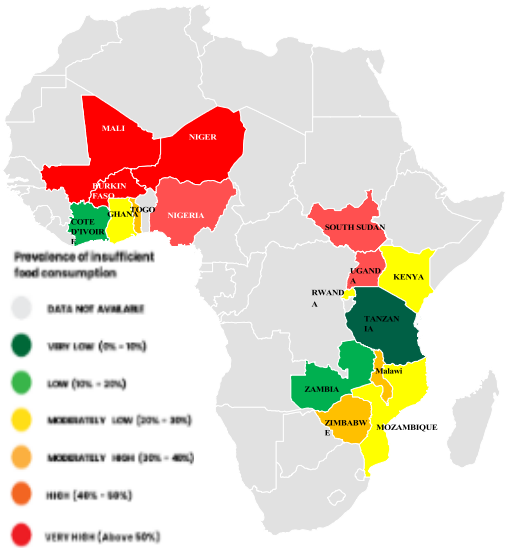
Commodity price trends across the region have been mixed. Countries such as Ethiopia, Ghana, Malawi, Nigeria, and Togo have seen declines in the national average price of maize (in local currencies), while Mali and Niger recorded lower average rice prices compared to six months ago. Compared to last month, Nigeria experienced 30.5% drop in maize price. Year-on-year, Ethiopia experienced a 2.14% drop in maize prices, and Niger saw an 8.21% decrease in rice prices. On the other hand, some countries have faced sharp price increases. South Sudan recorded the most significant surge in maize prices, with a 319% rise compared to a year ago. Tanzania and Rwanda also experienced substantial increases, at 65% and 57.9%, respectively. These price hikes further strain household food access and contribute to worsening food and nutrition security across the region, underscoring the urgent need for strengthened regional trade facilitation and increased aid, particularly in conflict-affected countries.

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

Country	Change (%) in people with insufficient food consumption from last 1 Month		Change (%) in people with insufficient food consumption from last 1 year		Commodity Price Changes (%) in the last 6 months		Commodity Price Changes (%) in the last 1 year	
Burkina Faso	0.00	○	0.00	○	6.30	↑	6.89	↑
Ethiopia					-10.92	↓	-2.14	↓
Ghana	0.00	○	58.49	↑	-3.61	↓		
Kenya	0.00	○	0.00	○	24.39	↑	24.46	↑
Malawi	0.00	○	0.00	○	-24.15	↓		
Mali	0.00	○	0.00	○	-5.91	↓	1.76	↑
Mozambique	0.00	○	0.00	○				
Niger	0.00	○	0.00	○	-11.00	↓	-8.21	↓
Nigeria	-16.28	↓	-21.12	↓	-30.55	↓		
Rwanda	0.00	○	38.46	↑	7.93	↑	57.90	↑
South Sudan	0.00	○	53.13	↑	73.61	↑	319.01	↑
Tanzania	0.00	○	0.00	○	37.50	↑	65.00	↑
Togo	0.00	○	42.11	↑	-0.89	↓	10.23	↑
Uganda	0.00	○	116.87	↑	27.36	↑	25.98	↑
Zambia	0.00	○	0.00	○	6.01	↑	0.13	↑
Zimbabwe	0.00	○	-18.18	↓				

Key: ○ No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, April 2025



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

Global Market Update

The FAO Food Price Index (FFPI) increased by 1% in April compared to March 2025 (**Figure 2**), driven by rises in the cereal, dairy and meat price indices despite declines in those of sugar and vegetable oils. The rise in cereal prices was attributed to tightening exportable supplies in the Russian Federation, steady export activity from some major exporters, and currency movements linked to a weaker United States dollar, amid trade policy developments and macroeconomic uncertainties.[4] On the other hand, the International Grain Council's (IGC) Grain and Oil Index (GOI) recorded a 4.18% decline in April compared to the same period last year.. On month-on-month basis, the sub-indices of maize and barley increased by of 3.15% and 1.02% respectively, while those for rice and soyabeans fell by 1.47% and 0.9% respectively.

Figure 2: FAO Food Price Index (FFPI)[5]

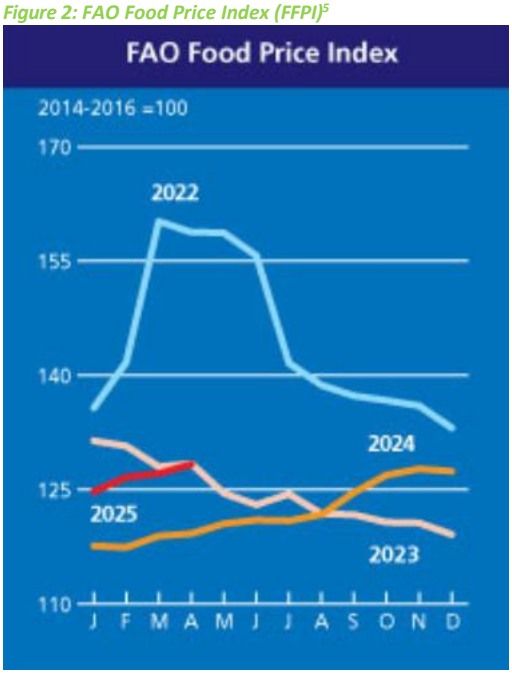


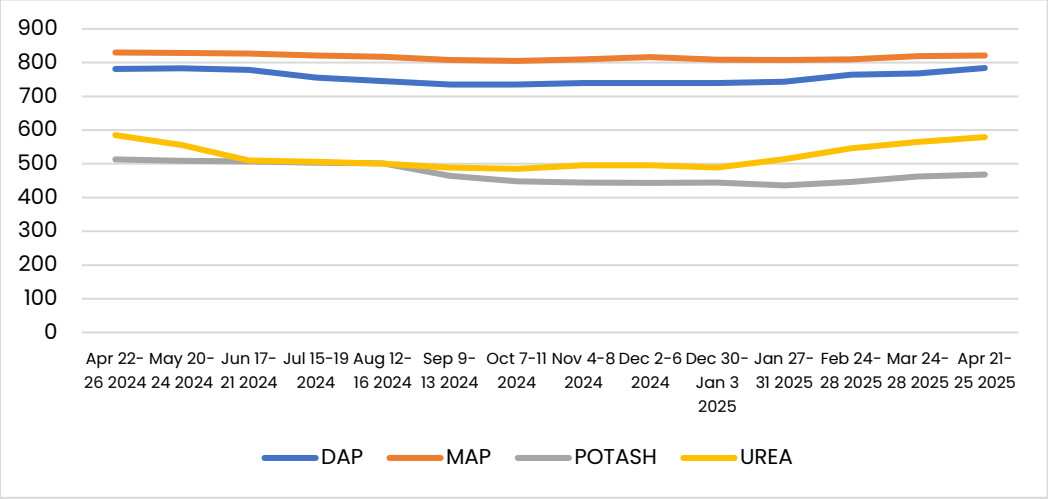
Table 2: IGC GOI Commodity Price Indices[6]

Jan 2000 = 100	30-Apr	% Change 1M	% Change 1Y
GOI	217.44	-	*-4.81*
Wheat	198.62	-	*-4.74*
Maize	237.50	*3.15*	*15.11*
Rice	176.19	*-1.47*	*-28.34*
Soyabeans	203.76	*-0.90*	*-6.51*
Barley	232.24	*1.02*	*8.77*

Global Fertiliser Prices

Over the past month, all fertiliser types have experienced price increases, with DAP and urea recording the highest gains at 2.1% and 2.5%, respectively. However, when compared to the same period last year, most fertilisers have seen moderate price declines. The exception is DAP, which posted a slight year-on-year increase of 0.4%. Potash recorded the most significant annual drop, falling by 8.8%.

Figure 3: Dry Fertiliser Prices ($/MT)



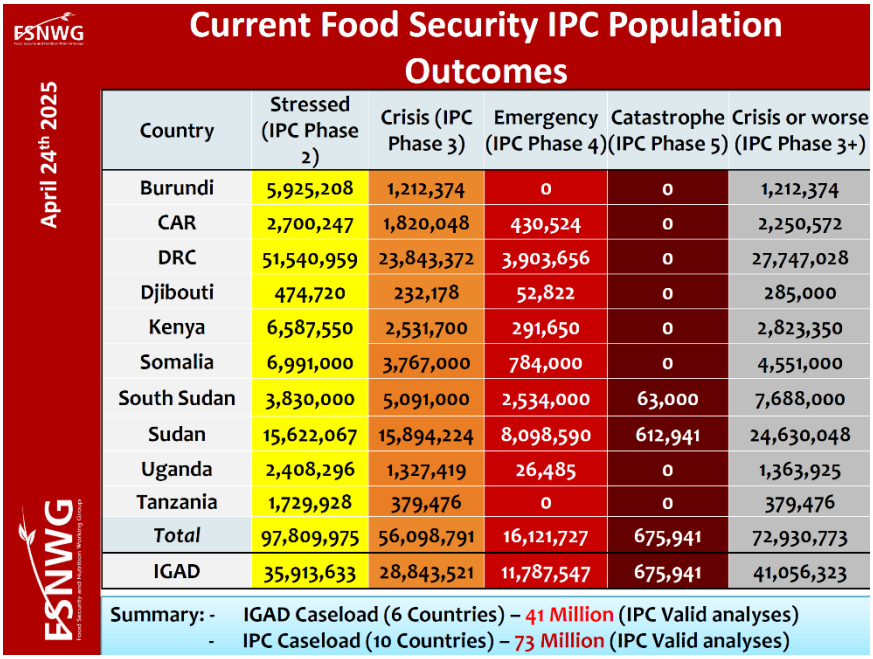
***Source**: Author's construction based on DTN[7]*

[4] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[5] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[6] https://www.igc.int/en/markets/marketinfo-goi.aspx
[7] https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/02/05/urea-uan32-lead-fertilizer-prices

East Africa Food Insecurity Updates

Food Security Outlook

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



As of the end of April 2025, nearly 12.3 million people across Kenya, South Sudan, Tanzania, and Uganda are experiencing Crisis (IPC Phase 3) or worse outcomes, according to the April 2025 report from the East and Central Africa Food Security and Nutrition Working Group (FSNWG). This represents an increase of approximately 2.3 million people over March 2025, driven by rises in Kenya (672,750), South Sudan (1,609,000), and Uganda (10,021).). As a result, South Sudan's share of the affected population has increased from 61% to nearly 63%. In addition, the number of people facing Catastrophic (IPC Phase 5) conditions in South Sudan has increased from 31,000 to 63,000. These deteriorating conditions are largely due to ongoing conflict, the continued influx of returnees from Sudan, and a shifting funding landscape, particularly the impact of USAID funding cuts, which are severely affecting food and nutrition security in the country.

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

Prevalence of Insufficient Food Consumption

The number of people facing food insecurity in five selected East African countries has remained unchanged over the past three consecutive months, standing at 45.3 million (Table 3). Nonetheless, this represents a worsening situation compared to April 2024, when 32.9 million people were affected, and April 2023, when the figure stood at 42.9 million people were affected. Over the past year all selected East African countries, except Kenya and Tanzania, have experienced a deterioration in food security. Rwanda, South Sudan, and Uganda been the most significant contributors at 38.4%, 53.1%, and 116.8%, respectively.

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Kenya	51.40	13.60	13.60	26.46	0.00 ●	0.00 ●	11.48 ↑
Rwanda	12.30	3.60	3.60	29.27	0.00 ●	38.46 ↑	20.00 ↑
South Sudan	11.00	4.90	4.90	44.55	0.00 ●	53.13 ↑	-23.44 ↓
Tanzania	56.30	5.20	5.20	9.24	0.00 ●	0.00 ●	-5.45 ↘
Uganda	42.70	18.00	18.00	42.15	0.00 ●	116.87 ↑	13.92 ↑

**Current month and **Previous month*

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

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

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

Commodity Prices

Key drivers of commodity prices in EA

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

Maize

Figure 5: National average price spreads for maize across select East African Countries[9]

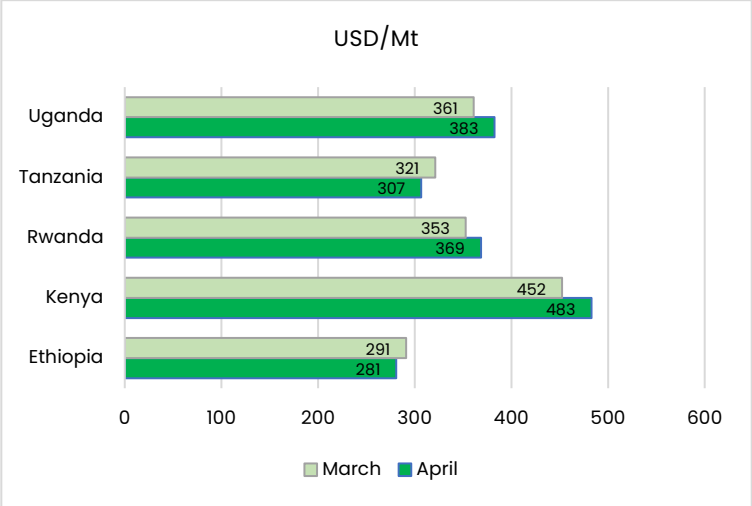


Figure 5 illustrates the price spread for maize (in USD) across five East African countries. Ethiopia has the lowest price in the region at USD 281/MT, reflecting a 4% month-on-month decrease. Kenya's maize prices have surged by 7% month-on-month, reaching USD 483 per metric ton, the highest in the region. This increase is driven by a reduced domestic supply and rising demand from animal feed millers[10]. In response, the Kenyan Government approved importation of 5.5 million bags of yellow maize with 50% import duty waiver designated exclusively for animal feeds production[11] to ease the pressure. Uganda and Rwanda have also recorded price increases of 6% and 4% month-on-month reaching USD 383/MT and USD 369/MT respectively, ranking as the second and third highest maize prices in the region. The price surges are attributed to sustained export demand by neighbouring countries and Southern Africa. In Tanzania, prices have slightly decreased by 4% to USD 307/MT due to currency depreciation and release of carryover stocks from previous season.

Overall, maize prices in local currency across the East African region remain elevated compared to the past 1-12 months (**Table 4**). South Sudan recorded the most significant price surges among the five East African countries, with prices standing at 101% and 319% higher than one month and twelve months ago respectively. Kenya and Uganda have continued to experience rising prices over the past year, with Kenya's increases ranging from 6.75% to 24.46% and Uganda's from 6% to 27.36%. Rwanda has also seen a 57.90% price surge compared to the previous year, yet prices have decreased by 11.91% since January 2025, though they remain 4.34% higher than the previous month.

These price movements reflect ongoing macroeconomic challenges and the depletion of maize stocks, largely driven by heightened demand in South Sudan, Kenya, and Southern Africa. In Ethiopia, however, prices are lower than they were in the past 1-12 months, having declined by 0.93% and 10.92% compared to the past one and six months respectively, owing to increased stock availability following a successful main season harvest. Tanzania has also recorded a 2.94% price drop over the last month, although prices remain significantly high, up by 37.50% and 65% compared to the past six to twelve months—primarily due to increasing demand from neighbouring Southern African countries.

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	3,738.13	-0.93 ↘	-1.72 ↘	-10.92 ↓	-2.14 ↘
Kenya	Maize	National Average, Retail, KES/KG	62.02	6.75 ↑	12.95 ↑	24.39 ⊗	24.46 ⊗
Rwanda	Maize	National Average, Retail, RWF/Kg	517.08	4.34 ▲	-11.91 ↓	7.93 ↑	57.90 ⊗
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	3,939.65	101.09 ⊗	106.95 ⊗	73.61 ⊗	319.01 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	82,500.00	-2.94 ↘	23.75 ⊗	37.50 ⊗	65.00 ⊗
Uganda	Maize (flour)	National Average, Retail, UGX/Kg*	2,386.61	2.26 ▲	7.78 ↑	-10.36 ↓	-1.67 ↘
Uganda	Maize (white)	National Average, Retail, UGX/Kg*	1,392.90	6.00 ↑	8.33 ↑	27.36 ⊗	25.98 ⊗

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

[10] See https://www.businessdailyafrica.com/bd/markets/commodities/kagwe-allows-imports-as-unga-prices-hit-13-month-high

[11] https://farmersreviewafrica.com/kenya-approves-5-5m-bags-of-yellow-maize-imports-with-50-duty-waiver-to-ease-pressure-on-white-maize/

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

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

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

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

Rice

Figure 6: National average price spreads for rice across select East African Countries[13]

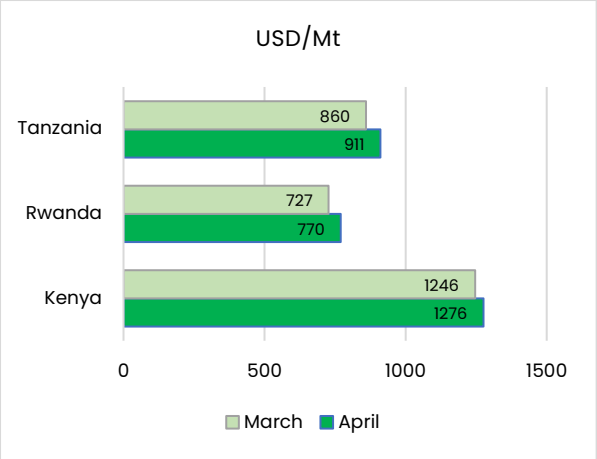


Figure 6 illustrates the rice price spread in USD across Tanzania, Rwanda, and Kenya, with all three countries experiencing price surges. Both Tanzania and Rwanda recorded a 5.6% month-on-month increase to USD 911/MT and USD 770/MT respectively. Kenya saw a modest 2.3% increase, reaching USD 1,276/MT, making it the country with the highest rice price in the region, despite a recent agreement to lower the customs valuation of Pakistani rice from USD 615 to USD 460 per metric ton. The price increases are attributed to increased demand and stock depletion from the previous month.

Overall, the local currency price trends (**Table 5**) indicate a rising trend in the region. In Tanzania prices have risen by 7.69%, 26.72%, 22.50%, and 16.67% compared to the past one, three, six, and twelve months, respectively. In Kenya, prices are currently 5.31% and 15.50% higher than they were in the past 6 and 12 months, respectively. Similarly, Rwanda has seen a moderate uptick in its rice prices, which are 2.79% higher compared to past month and 9.12% higher compared to the past year.

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	163.81	2.36 ▲	1.05 ▲	5.31 ↑	15.50 ⊗
Rwanda	Rice	National Average, Retail, RWF/Kg	887.86	2.79 ▲	-3.38 ↘	9.77 ↑	9.12 ↑
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	245,000.00	7.69 ↑	26.72 ⊗	22.50 ⊗	16.67 ⊗

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

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

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

Beans

Figure 7: National average price spreads for beans across select East African Countries[15]

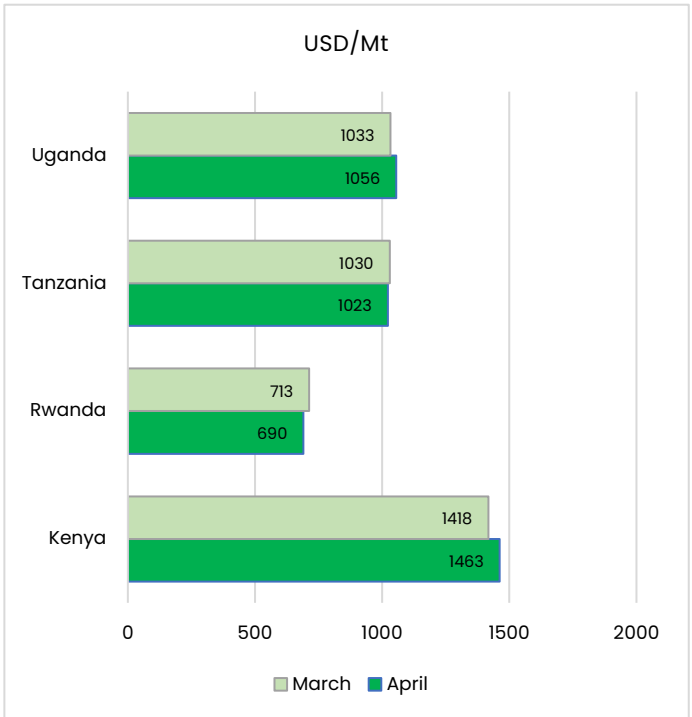


Figure 7 illustrates the price trends of beans in USD across four selected East African countries. Owing to favourable green harvests and effective stock maintenance earlier in the year, prices in Tanzania and Rwanda have remained stable or slightly lower by 1% and 3% respectively, with prices reaching at USD 1,023/MT and USD 690/MT. In contrast, Uganda and Kenya have recorded month-on-month increases of 2.2% and 3.1% with prices rising to USD 1,056/MT and USD 1,463/MT respectively. Kenya now has the highest bean prices in the region, driven by increased export demand from East and Southern African countries. Despite this, Rwanda maintains the lowest price in the region, followed by Tanzania and Uganda.

In local currencies, as shown in **Table 6**, the prices of beans in the region have experienced low to moderate increases. In Rwanda prices are up by 7.45% and 68.18% compared to the past 3 and 12 months, respectively, due to rising demand from countries in East and Southern Africa regions. The prices of Kenya's red haricot beans and Uganda's beans have also registered low (0-5%) to moderate (5-15%) increases compared to the past 1-6 months. However, Kenya's red haricot beans are priced 24.88% lower compared to the same period last year. Meanwhile, Kenya's yellow-green beans have seen a consistent low to moderate price increase over the past 1-12 months, ranging from 1.08% to 14.86%, owing to stock depletion from recent green harvests. Similarly, bean prices in Tanzania have experienced a slight increase compared to the past 1-12 months, ranging from 0.92% to 10%.

[13] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[14] Author's construction based on 1) FAO data for Rwanda, 2) National MIS Kenya & Tanzania
[15] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	187.82	3.13 ▲	1.08 ▲	1.39 ▲	14.86 ↑
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	142.13	-1.92 ↘	2.15 ▲	1.91 ▲	-24.88 ↓
Rwanda	Beans	National Average, Retail, RWF/Kg	968.55	-3.24 ↘	7.45 ↑	0.20 ▲	68.18 ⊗
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	275,000.00	0.92 ▲	1.85 ▲	1.85 ▲	10.00 ↑
Uganda	Beans	National Average, Retail, UGX/Kg*	3,843.61	2.25 ▲	0.02 ▲	7.46 ↑	4.91 ▲

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

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

Wheat

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

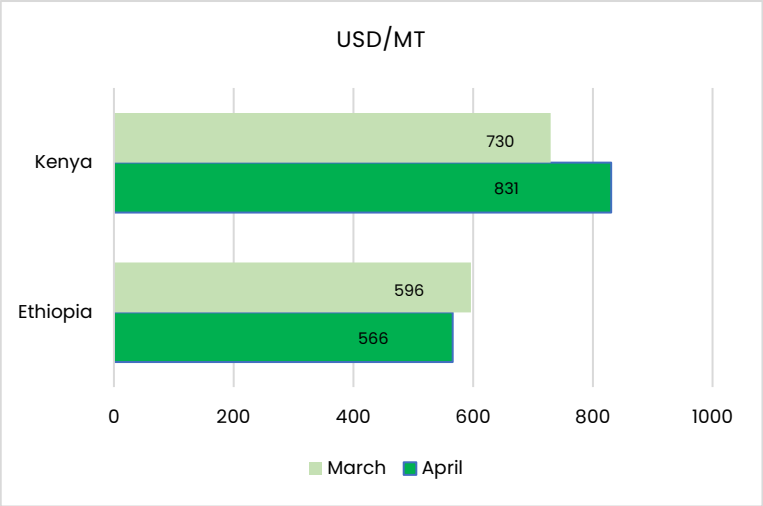


Figure 8 illustrates wheat prices in USD for two selected East African countries: Kenya and Ethiopia. Kenya recorded a 12% price increase reaching USD 831/MT, while the Ethiopia recorded a 5% decrease, prices falling to USD 566/MT owing to currency depreciation. Kenya's price increase is attributed to high production costs, low yields, and limited mechanisation.

Similar trends are observed in local currency prices **(Table 7),** where Kenya's wheat prices have increased by 13.8% and 31.1% compared to the 1-month and 12-month's levels. Despite wheat prices in Ethiopia dropping by 2.5% over the previous month, it remains generally elevated above what they were over the past 3-12 months. Rising demand and stock depletion in Ethiopia continue to drive upward pressure on price trends.

Table 7: Percentage changes in wheat prices in East Africa[17]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	7,530.35	-2.59 ↘	8.49 ↑	2.54 ▲	12.12 ↑
Kenya	Wheat	National Average, Retail, KES/KG	106.67	13.84 ↑	23.61 ⊗	11.89 ↑	31.18 ⊗

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

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

Fertiliser

Fertiliser prices show mixed trends across Kenya and Rwanda. In Kenya, the prices of all monitored fertilisers have declined over the past month. Calcium Ammonium Nitrate (CAN), Diammonium Phosphate (DAP), and NPK fertilisers dropped by 24.6%, 19.1%, and 13.6%, respectively. Also, the prices of CAN, DAP, and NPK fertilisers are significantly lower by 33.8%, 56.6%, and 22.1% compared to a year ago. This downward trend is largely attributed to the release of one million bags of fertiliser, which helped ease supply shortages and drive prices down.

In contrast, Rwanda has experienced moderate increases in urea prices. Compared to one, three, and six months ago, prices have risen by 5.7%, 8%, and 11.8%, respectively. Despite these short-term increases, the current prices of all monitored fertilisers in Rwanda remain 8.8% lower than the year-on-year benchmark.

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

[17] 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[18]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	70.58	-24.69	-12.39	-22.80	-33.85
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	100.81	-19.13	1.74	-16.42	-56.65
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	90.86	-13.68	0.84	-5.02	-22.18
Rwanda	Urea	National Average USD/50KG*	1,080.00	5.77	8.00	11.86	-8.86

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

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

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

Seasonal Monitor and Cropping Conditions

In **East Africa**, main season cereals are currently in the planting, vegetative or reproductive stages. Forecasts indicate a high likelihood of wetter than usual conditions across most parts of the region during the May to July season, while drier than average conditions are expected in western South Sudan, northern Ethiopia, and north-eastern Tanzania in May. Temperatures during this period are expected to be warmer than usual.[19]

In Ethiopia, delayed and insufficient rainfall is affecting the onset of the Belg season planting in the northern and central regions. Meanwhile, dry conditions are impacting main season crops in parts of Uganda, Kenya, Somalia, Rwanda, and Burundi. Despite these challenges, western areas of the region are expected to receive average to above-average rainfall through July 2025, which could provide relief for agricultural activities in those areas.

In Tanzania, Masika season cereal crops are progressing through the vegetative to reproductive stages, with harvesting expected in July. In unimodal regions, Msimu season cereals are in comparable growth phases and are expected to be harvested in May. Overall, agronomic conditions remain favourable, despite localised dry spells in central areas. Additionally, crops along the northern coast have largely recovered from previous drought concerns. However, prolonged heavy rainfall in late March, crop yields and food stocks in the Morogoro region have been adversely affected, raising concerns over future food stock supply in the market.

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

[19] ICPAC

Southern Africa Food Security Update

Prevalence of Insufficient Food Consumption

As of the end of April 2025, the number of people facing insufficient food consumption situation in four selected Southern African countries, remained unchanged at 22.2 million from March 2025 (see Table 9). Despite this stability, the current level is lower than April 2024, when 23.2 million people were affected, but higher than April 2023, which recorded 20.6 million. Compared to a year ago, Zimbabwe saw an 18.18% improvement in the number of people affected; however, the current figure remains 45% higher than it was two years ago.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (April 2025)[20]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Malawi	18.10	6.80	6.80	37.57	0.00	0.00	21.43
Mozambique	29.50	7.60	7.60	25.76	0.00	0.00	-7.32
Zambia	17.40	3.30	3.30	18.97	0.00	0.00	-10.81
Zimbabwe	15.20	4.50	4.50	29.61	0.00	-18.18	45.16

**Current month and **Previous month*

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

Commodity Prices

Key drivers of prices in the Southern Africa region

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

Figure 9: National average price spreads for maize across select Southern African Countries[21]

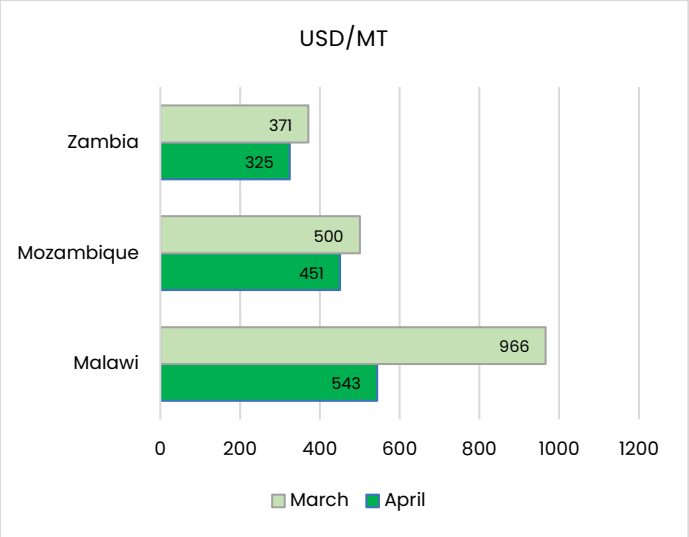


Figure 9 illustrates maize prices in USD for Zambia, Malawi, and Mozambique, all of which recorded month-on-month price declines. This downward trend is largely attributed to the influx of newly harvested maize into the market, boosting supply and driving price reductions. Malawi experienced a substantial 44% drop in maize prices in USD, marking a major shift for a country that had previously faced significant price increases. Similarly, Zambia and Mozambique have recorded 12% and 10% declines, bringing prices to USD 325/MT and USD 451/MT, respectively. Despite the overall decline, Malawi continues to hold the highest maize price among the three selected countries at USD 543/MT.

As shown in **Table 10**, the selected Southern African countries have generally experienced declining food prices in local currency, largely due to the arrival of newly harvested crops in the market. Similarly, in local prices, Malawi recorded the steepest month-on-month drop at 34.36%, followed by Zambia at 14.24% and Mozambique at 9.91%, compared to March. Also, in Malawi, maize and rice prices remain 24.1% and 38.5% lower than their six-month averages. However, bean

[20] Author's construction based on HungerMap
[21] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en

and rice prices in Malawi are still elevated relative to the three-month average, standing 6.3% and 43.1% higher, respectively. Similarly, in Mozambique, prices for grain maize and imported rice remain significantly above their three-month levels, by 11% and 115%, respectively, despite the broader regional trend of price easing.

Table 10: Percentage changes in select commodity prices in Southern Africa[22]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	4,820.00	-16.26 ↓	6.35 ↑	25.60 ⊗	
Malawi	Maize	National Average, MWK/Kg	937.19	-34.36 ↓	-20.18 ↓	-24.15 ↓	
Malawi	NPK	National Average, MWK/Kg	2,533.33	1.88 ▲	-34.47 ↓	-19.27 ↓	
Malawi	Rice	National Average, MWK/Kg	3,948.15	-3.15 ↘	43.12 ⊗	-38.55 ↓	
Malawi	Urea	National Average, MWK/Kg	2,441.67	-2.63 ↘	-33.99 ↓	-55.84 ↓	
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	28.48	-9.91 ↓	11.05 ↑		
Mozambique	Rice (imported)	National Average, Maize (white), MZN/Kg	68.22	-2.40 ↘	115.44 ⊗		
Mozambique	Wheat (Flour)	National Average, Maize (white), MZN/Kg	53.87	-15.47 ↓			
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	9.06	-14.24 ↓	-5.57 ↓	6.01 ↑	0.13 ▲

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

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

Seasonal Monitor and Cropping Conditions

In **Southern Africa**, the harvesting of main-season cereals is approaching completion, with projected sufficient harvests. However, localised dry conditions in parts of Zambia and Malawi may affect production levels. Additionally, parts of Mozambique have been impacted by Cyclone Jude and ongoing conflict, further disrupting agricultural activities.

According to AKADEMIYA2063's Africa Agriculture Watch (AAgWa), maize production in Zimbabwe is projected to reach 1,280,839 MT in 2025, marking an 8% increase from 2024. In Mozambique, rice production is expected to rise by 4% reaching 234,957 MT. Conversely, Zambia's sorghum production is anticipated to decline by 3%, resulting in an estimated annual output of 19,400 MT.

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

West Africa Food Security Update

Prevalence of Insufficient Food Consumption

As of April 30, 2025, the number of people facing insufficient food consumption in seven selected West African countries has declined to 141.2 million people, marking a notable improvement from March 2025, when the figure stood at 157.3 million (see Table 11). This significant reduction of 16.1 million people is primarily attributed to Nigeria. Consequently, the current level of insufficient food consumption across the seven West African countries is lower than the 158.5 million reported in April 2024 but higher than the 119.2 million in April 2023.

Compared to a year ago, Ghana and Togo have recorded the most significant increases in the number of people facing food insecurity at 58.4% and 42.1% respectively. The Cadre Harmonisé (CH)[23] analysis further confirms the deteriorating food security situation across West and Central Africa. The latest assessment for the March–May 2025 period indicates that 36.8 million people are facing food insecurity at CH Phase 3 or above (Crisis and worse), including 1.6 million in Phase 4 (Emergency) - the highest level ever recorded for this time of year. Notably sharp increases in food insecurity were observed in Ghana (+106%), Guinea (+84%), and Côte d'Ivoire (+34%)[24]. The CH analysis attributes this worsening situation to a combination of conflict and displacement, economic vulnerability, persistently high food prices, and recent severe flooding. It underscores the urgent need for sustained action, adequate funding, and stronger structural responses to address the growing crisis.

Table 11: Prevalence of Insufficient Food Consumption in selected West African countries (April 2025)[25]

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Burkina Faso	19.80	11.20	11.20	56.57	0.00 ●	0.00 ●	2.75 ↗
Cote d'Ivoire	29.40	5.10	5.10	17.35	0.00 ●	0.00 ●	37.84 ↑
Ghana	29.80	8.40	8.40	28.19	0.00 ●	58.49 ↑	10.53 ↑
Mali	19.10	13.20	13.20	69.11	0.00 ●	0.00 ●	0.00 ●
Niger	25.90	21.40	21.40	82.63	0.00 ●	0.00 ●	40.79 ↑
Nigeria	202.80	79.20	94.60	46.65	-16.28 ↓	-21.12 ↓	20.18 ↑
Togo	7.90	2.70	2.70	34.18	0.00 ●	42.11 ↑	0.00 ●

**Current month and **Previous month*

● = *no change;* ↗ = *low increase (0-5%),* ↑ = *moderate increase (5-15%),* ↑ = *high increase (>15%),*

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

Commodity Prices

Key drivers of the price movements in West Africa include

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

[23] The CH is similar to the Integrated Food Security Phase Classification (IPC) and it is a consensus-based tool developed by the Permanent Interstate Committee for Drought Control in the Sahel (CILSS), in collaboration with partners like FAO, WFP, and others.

[24] https://www.linkedin.com/posts/ollo-sib-87080041_foodsecurity-westafrica-cadreharmonisaez-activity-7319693251697913856-H6wI?utm_medium=ios_app&rcm=ACoAAAhSBrkBPEsNXy5jQuHRkEEMrqfLaNXQ5s8&utm_source=social_share_send&utm_campaign=whatsapp

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

Maize

Figure 10: Price spreads for maize across select West African Countries[26]

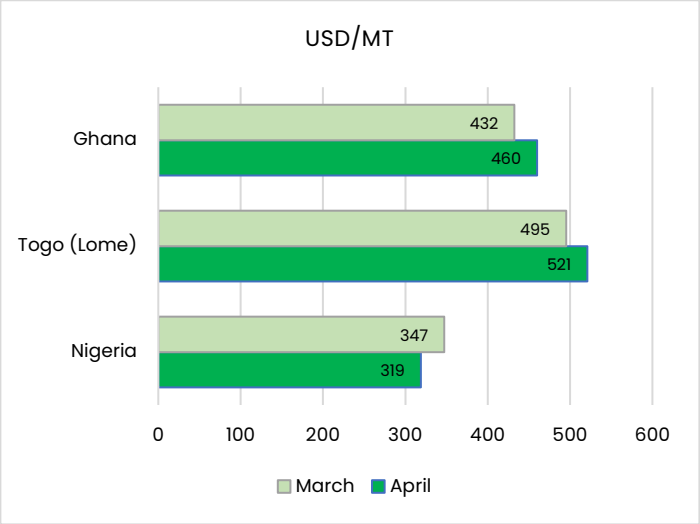


Figure 10 illustrates the maize price distribution in USD across three West African countries: Ghana, Togo, and Nigeria. Among these, Nigeria recorded the lowest price at USD 319/MT, down from USD 347/MT. In contrast, Togo recorded the highest price at USD 521/MT, up from USD 495/MT. The decrease in maize prices in Nigeria both USD and local currency reflects a sustained downward trend, with prices dropping by 4.15%, 21.95%, and 30.55% over the past 1, 3, and 6 months, respectively **(refer to Table 12).**

Similarly, in Togo, maize prices in local currency have remained relatively stable or experienced marginal increases ranging between (0-5%), over the past one and six months. However, current prices in some markets, such as Amegnran, are still up to 18% higher than they were a year ago. The overall increase in cereal prices is driven by several factors, including currency depreciation, rising transportation costs, reduced cereal production, and market disruptions caused by regional conflicts.

Table 12: Percentage changes in maize prices in West Africa[27]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	6,662.04	-0.26 ↘	1.14 ▲	-3.61 ↘	
Nigeria	Maize (white)	National Average, NGN/KG	511.00	-4.15 ↘	-21.95 ↓	-30.55 ↓	
Togo	Maize (white)	Amegnran, XOF/Kg*	295.00	1.72 ▲	1.72 ▲	5.36 ↑	18.00 ⊗
Togo	Maize (white)	Anie, XOF/Kg*	270.00	1.89 ▲	1.89 ▲	-3.57 ↘	8.00 ↑
Togo	Maize (white)	Cinkassé, XOF/Kg*	270.00	1.89 ▲	1.89 ▲	-1.82 ↘	8.00 ↑
Togo	Maize (white)	Kara, XOF/Kg*	280.00	-1.75 ↘	0.00 ●	-3.45 ↘	7.69 ↑
Togo	Maize (white)	Korbongou, XOF/Kg*	265.00	1.92 ▲	1.92 ▲	-1.85 ↘	8.16 ↑
Togo	Maize (white)	Lomé, XOF/Kg*	300.00	0.00 ●	0.00 ●	0.00 ●	11.52 ↑

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

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

Rice

Figure 11: Price spreads for rice across select West African Countries[28]

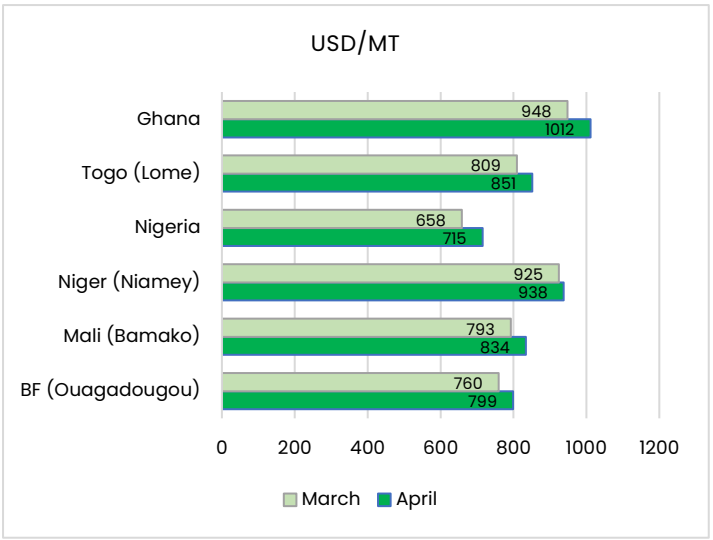


Figure 11 illustrates the rice price spread in USD across six West African markets, all of which recorded month-on-month price increases, largely driven by currency depreciation. Despite a cereal export ban, Ghana recorded the highest rice price at USD 1,012/MT, up from USD 948/MT in March 2025. Nigeria posted the lowest price at USD 715/MT, rising from USD 658/MT over the same period.

In local currency terms, rice prices across most selected West African markets have generally remained stable, declined or recorded low to moderate increases over the past one to six months **(see Table 13).** Generally, the current rice price level remains low to moderately higher than those observed a year ago, except in Fada Ngouma and Kongoussi in Burkina Faso, where prices are higher by 19% and 20%, respectively compared to the same period last year. Inflationary pressures, coupled with rising fuel and electricity costs, continue to intensify the financial burden on households. Additionally, violence in key food-producing regions has severely disrupted supply chains, further straining food availability and affordability.

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

Table 13: Percentage changes in rice prices in West Africa[29]

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	6.25	1.19	1.19	1.19
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	50,000.00	0.00	-9.09	-9.09	4.17
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	56,000.00	0.00	1.82	7.69	1.82
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	11.11	19.05
Burkina Faso	Rice (imported)	Kongoussi, Wholeslae, XOF/100 kg	60,000.00	0.00	9.09	20.00	20.00
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	46,000.00	0.00	-3.16	-8.00	-1.08
Ghana	Rice	National Average, (GHS/MT)	15,571.43	-0.03	-12.69	-6.91	
Mali	Rice	Bamako, Wholesale, XOF/100 KG	48,000.00	0.00	4.35	-14.29	6.67
Mali	Rice	Kayes, Wholesale, XOF/100 KG	54,000.00	0.00	0.00	-10.00	3.85
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	-5.26	5.88	-18.18	-4.26
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG	49,000.00	2.08	8.89	-18.33	16.67
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	48,000.00	0.00	9.09	-5.88	9.09
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	38,000.00	-1.30	-3.80	-12.64	-15.56
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	50,000.00	-3.85	11.11	0.00	4.17
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	620.00	-6.06	-3.13	-3.13	3.33
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	560.00	-6.67	-12.50	-12.50	-9.68
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	540.00	-3.57	-6.90	-12.90	-10.00
Nigeria	Rice (milled)	National Average, NGN/KG	1,146.00	13.35	-5.66	-14.33	
Togo	Rice (imported)	Amegnran, XOF/Kg*	500.00	0.00	0.00	0.00	2.04
Togo	Rice (imported)	Anie, XOF/Kg*	500.00	0.00	0.00	0.00	5.26
Togo	Rice (imported)	Cinkassé, XOF/Kg*	490.00	2.08	2.08	2.08	4.26
Togo	Rice (imported)	Korbongou, XOF/Kg*	500.00	0.00	0.00	0.00	2.04
Togo	Rice (imported)	Lomé, XOF/Kg*	485.00	-1.02	-1.02	-1.02	1.04

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

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

Millet

Figure 12: Price spreads for millet across select West African Countries[30]

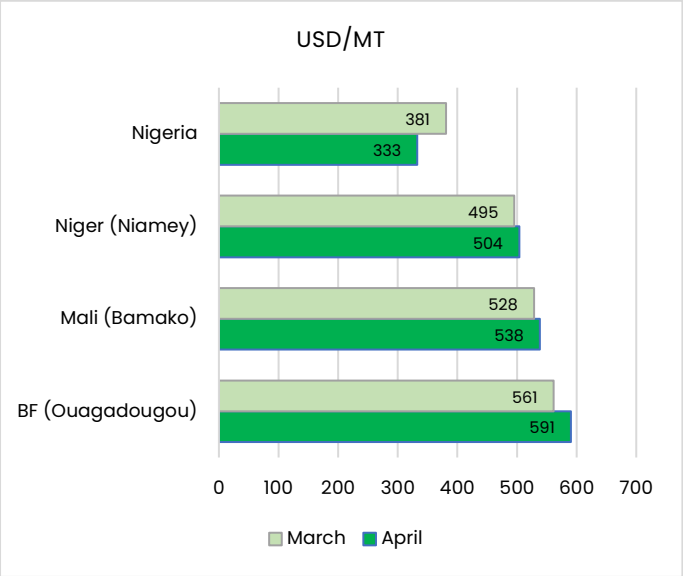


Figure 12 illustrates millet prices in USD across selected West African countries. As of April, the highest prices were recorded in Ouagadougou, Burkina Faso, while Nigeria had the lowest, following a 13% month-on-month decline. The price drop in Nigeria is largely attributed to the government's tariff moratorium on millet, which boosted supply through increased imports. In contrast, Burkina Faso continues to experience the effects of a poor 2024 harvest, with millet prices rising by 5% month-on-month, reaching USD 591/MT.

Overall, millet prices in local currency remained stable or declined month-on-month across all selected markets, except Tenkodogo, Mopti, Tillaberi, and Zinder (see **Table 14**). Nigeria saw significant price drops of 8.95%, 18.86%, and 27.36% over the past one, three, and six months, respectively. However, on a year-over-year basis, millet prices remain notably high across most markets in Burkina Faso, Mali, and Niger, except in Dosso, Maradi, Niamey, Tillaberi, and Zinder. This sustained surge in millet prices in some markets is driven by production shortfalls in 2024, rising fuel prices—which have inflated transportation costs—and market disruptions caused by ongoing regional conflicts.

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

Table 14: Percentage changes in millet prices in select West African Countries[31]

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	5.56	0.00	16.92
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	32,500.00	0.00	8.33	-18.75	18.18
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	40,000.00	-2.44	5.26	-15.79	14.29
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	33,000.00	0.00	1.54	10.00	17.86
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00	0.00	0.00	60.38
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	35,000.00	0.00	0.00	16.67	48.94
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	34,000.00	0.00	13.33	-11.69	19.30
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg	42,500.00	6.25	18.06	-2.30	30.77
Mali	Millet	Bamako, Wholesale, XOF/100 KG	31,000.00	-3.13	3.33	-20.51	24.00
Mali	Millet	Gao, Wholesale, XOF/100 KG	37,500.00	0.00	-12.79	-21.05	15.38
Mali	Millet	Kayes, Wholesale, XOF/100 KG	35,000.00	0.00	6.06	-12.50	29.63
Mali	Millet	Mopti, Wholesale, XOF/100 KG	33,000.00	3.13	26.92	-15.38	20.00
Mali	Millet	Ségou, Wholesale, XOF/100 KG	26,000.00	-13.33	4.00	-25.71	23.81
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	32,500.00	0.00	44.44	-18.75	30.00
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	38,000.00	0.00	8.57	-8.43	26.67
Niger	Millet	Agadez, Wholesale, XOF/Kg	400.00	0.00	37.93	-23.08	37.93
Niger	Millet	Dosso, Wholesale, XOF/Kg	285.00	0.00	11.76	-28.75	-5.00
Niger	Millet	Maradi, Wholesale, XOF/Kg	270.00	-1.82	1.89	5.88	-1.82
Niger	Millet	Niamey, Wholesale, XOF/Kg	290.00	-3.33	-3.33	-9.38	-7.94
Niger	Millet	Tillaberi, Wholesale, XOF/Kg	310.00	3.33	3.33	-8.82	-11.43
Niger	Millet	Zinder, Wholesale, XOF/Kg	340.00	3.03	13.33	36.00	0.00
Nigeria	Millet	National Average, NGN/KG	533.00	-8.95	-18.86	-27.36	

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

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

Sorghum

Figure 13: Price spreads for sorghum across select West African Countries[32]

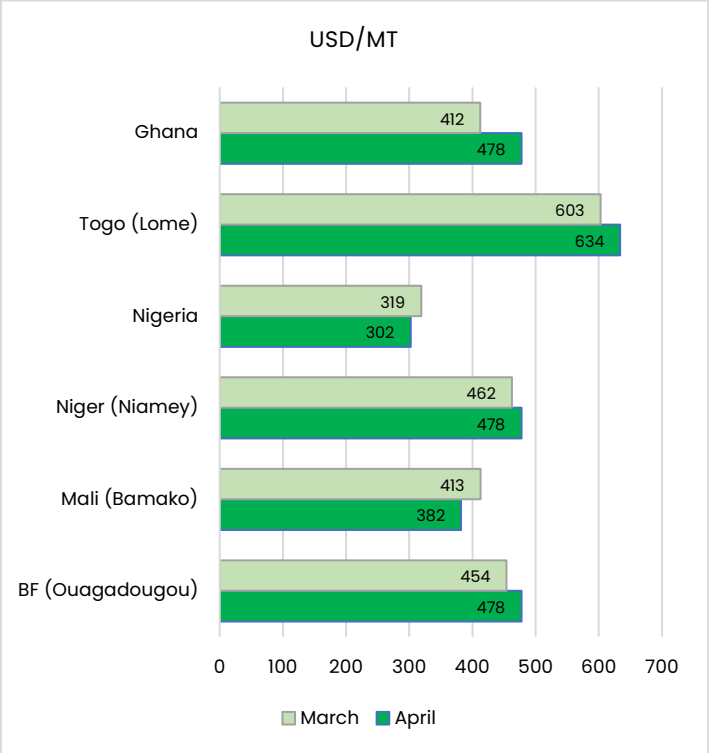


Figure 13 highlights the USD price spread of sorghum across major markets in selected West African countries. The highest price was recorded in Lomé, Togo, at USD 634/MT, reflecting a 5% month-on-month increase, while Nigeria posted the lowest price at USD 302/MT, down 5.3% from the previous month.

In local currency terms (see **Table 15**), sorghum prices remained stable or saw slight declines across markets. However, notable exceptions include moderate month-on-month increases observed prices in Burkina Faso's Dedougou, Fada N'Gourma, and Kongoussi markets, Ghana's national average, and Togo's Cinkasse and Korbongou. Over a 12-month period, Burkina Faso's markets have seen significantly elevated prices, ranging from 2.17% to 10%. In Ghana, after a slight dip in January 2025, prices rose by 8.54% this month, though they remain below October 2024 levels. Mali's prices have been largely stable, except in Sikasso, where prices are 7.14% higher year-on-year. As previously noted, Togo's Cinkasse and Korbongou markets recorded slight increases over the past 1, 3, and 12 months, by 3.51% and 3.45%, respectively.

These mixed price trends are driven by a combination of factors, including elevated transportation costs, strong local demand, conflict-related market disruptions, and localised production shortfalls from the 2024 cereal harvest[33].

[31] Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo
[32] These price spreads are calculated based on online rates at https://www.oanda.com/currency-converter/en
[33] FPMA March 2025 https://www.fao.org/giews/food-prices/regional-roundups/detail/en/c/1733197/

Table 15: Percentage changes in sorghum prices in select West African countries [34]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	23,500.00	0.00	4.44	-6.00	2.17
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	27,500.00	7.84	10.00	-8.33	10.00
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	35,000.00	0.00	9.38	-6.67	9.38
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	27,000.00	3.85	8.00	-8.47	3.85
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	27,500.00	10.00	10.00	-8.33	10.00
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	27,500.00	0.00	14.58	-1.79	7.84
Ghana	Sorghum	National Average, (GHS/MT)	7,066.67	8.54	-6.74	-15.65	
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	22,000.00	-12.00	4.76	-32.31	-8.33
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00	-1.96	-28.57	0.00
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	22,500.00	0.00	0.00	-25.00	7.14
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	34,000.00	0.00	3.03	-2.86	4.62
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	360.00	0.00	24.14	-33.33	24.14
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	275.00	-1.79	10.00	-26.67	-19.12
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	275.00	-1.79	-1.79	-36.05	-1.79
Nigeria	Sorghum (white)	National Average, NGN/KG	484.00	-1.18	-14.64	-37.12	
Togo	Sorghum	Anie, XOF/Kg*	315.00	-1.56	-1.56	-1.56	5.00
Togo	Sorghum	Cinkassé, XOF/Kg*	295.00	3.51	3.51	-4.84	3.51
Togo	Sorghum	Korbongou, XOF/Kg*	300.00	3.45	3.45	-4.76	3.45
Togo	Sorghum	Lomé, XOF/Kg*	365.00	0.00	0.00	0.00	4.29

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

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

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

Fertiliser

Table 16 highlights the price fluctuations of various monitored fertiliser types in Nigeria. NPK fertiliser prices remain relatively low compared to the past 1 to 12 months, with declines ranging from 2.27% to 8.87%. In contrast, Urea fertiliser has experienced price increases of 10.92% and 7.88% over the past 1 and 3 months, respectively. This surge is partially linked to a 13% global rise in urea prices during the first quarter of 2025, with further volatility driven by fluctuating exchange rates and the devaluation of the Nigerian currency, making higher fertiliser costs increasingly burdensome for farmers.

Table 16: Percentage changes in fertiliser prices in West Africa[35]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Nigeria	Fertiliser_NPK	National Average, NGN/50KG	827.89	-7.60	-2.27	-8.87	
Nigeria	Fertiliser_Urea	National Average, NGN/50KG	740.17	10.92	7.88	-4.08	

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

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

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

Seasonal Monitor and Cropping Conditions

In **West Africa**, planting is ramping up under generally favourable conditions, although some areas face localised rainfall deficits. In Nigeria, the ongoing conflict in the northern region continues to disrupt agricultural operations. The Nigerian Meteorological Agency forecasts average to above-average rainfall this season, but potential delays in its onset in parts of central and northern Nigeria could pose challenges for planting. Meanwhile, second-season rice harvesting has concluded in Mali, while southwestern Ghana is experiencing a slight precipitation shortfall, and southwestern Côte d'Ivoire is facing a moderate to severe rainfall deficit. Despite these localised challenges, agro-climatic conditions remain conducive to continued cropping activities throughout the region.

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

[35] Author's construction based on AfricaFertiliser.org

Food Trade Updates

Continental

- The African Export-Import Bank (Afreximbank) and Zep Re (PTA Reinsurance company) have launched a new platform called the Trans-Africa Bond Alliance (TABA), which offers a unified bond system for cross-border traders. The platform aims to enhance the continent's insurance capacity and enable more African businesses to participate in regional trade. With TABA, traders can transport goods using a single transit bond, effectively reducing delays and cutting costs linked to multiple bonds.
- The United States of America, under the administration of President Donald Trump, intends to terminate America's funding for the African Development Fund, the concessional branch of the African Development Bank. This decision, revealed just days before the bank's annual meeting in Abidjan, could lead to significant repercussions.

East Africa

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

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

Kenya & Ethiopia

Kenya and Ethiopia have signed a groundbreaking agreement to facilitate cross-border trade under the African Continental Free Trade Area (AfCFTA) framework. The deal establishes designated border trade zones—extending 100 kilometres into Kenya and 50 kilometres into Ethiopia, where traders can conduct transactions of up to USD 1,000 per trip, with a limit of four trips per month. Trade within these zones will be restricted to a jointly approved list of goods.

Southern Africa

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

Figure 15: Southern Africa Food Trade updates for March 2025

Malawi and Tanzania

Malawi and Tanzania have lifted reciprocal trade restrictions that had affected the flow of agricultural goods between the two countries. In March, Malawi and South Africa imposed bans on several Tanzanian agricultural products, including rice, flour, ginger, bananas, and maize. In retaliation, Tanzania halted all agricultural imports from both countries. However, following a bilateral diplomatic meeting on 2nd May, Malawi and Tanzania agreed to remove the restrictions, restoring the free movement of goods across their borders.

West Africa

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

Figure 16: West Africa Cross Border Trade Updates March 2025

Nigeria

Nigeria has formally gazetted and submitted its ECOWAS Schedule of Tariff Offers for Trade in Goods under the African Continental Free Trade Area (AfCFTA) to the AfCFTA Secretariat. This gazetted schedule lays the groundwork for implementing zero tariffs on 90% of tariff lines, enhancing the competitiveness and market access of Nigerian goods across the African continent.

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

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

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