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FOOD SECURITY MONITOR

EDITION 59 • JUNE 2025

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 59th edition provides an overview of the food security situation and market prices across East, South, and West Africa.

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

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Summary

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

Food Commodity Prices Updates

Food prices across **East Africa** exhibited a general upward trend, influenced by persistent conflict, macroeconomic instability, seasonal variability, and currency fluctuations. Maize prices increased in all monitored countries, with **South Sudan** recording the highest at USD 850/MT, largely due to currency depreciation and disrupted oil revenues. **Kenya, Tanzania, Uganda, and Rwanda** also experienced price hikes, with Rwanda's increase attributed to rising fuel and transport costs. Rice prices followed a similar pattern, with Kenya registering the highest at USD 1,261/MT, while South Sudan maintained the lowest despite broader economic challenges. Bean prices showed mixed dynamics: Kenya and Rwanda experienced slight declines due to seasonal harvests, whereas Uganda saw a modest increase linked to constrained supply. Wheat prices diverged, decreasing in Kenya due to global supply surpluses, while Ethiopia experienced a marginal rise driven by regional demand. Overall, food prices remain elevated, particularly in South Sudan, Kenya, and Uganda, reflecting ongoing structural and economic pressures across the region.

In **Southern Africa**, food prices showed mixed trends, with notable increases in maize and rice prices in **Malawi, Zambia,** and **Zimbabwe**, driven by currency fluctuations, seasonal harvest dynamics, and supply constraints. Maize prices surged most sharply in **Mozambique** (46.6%) and Zambia (31.8%), while Zimbabwe's remained stable. Rice prices rose in Zimbabwe and Malawi but declined in Mozambique due to improved imports. Bean prices were stable in Zimbabwe, fell in Mozambique, and rose in Malawi, reflecting varied supply conditions. Despite recent harvests, elevated prices in several countries highlight ongoing market pressures and concerns over food access.

In **West Africa**, food prices across West Africa showed mixed trends across key staples. Maize prices declined in Ghana, Nigeria, and Togo, driven by improved supply, favourable harvests, and currency appreciation. **Ghana** saw a 6.6% drop to USD 612/MT, while **Nigeria** and **Togo** recorded sharper declines of 15.8% and 17.7%, respectively. Rice prices exhibited regional variation: Ghana and Togo experienced moderate increases due to rising demand and currency effects, while Nigeria, Niger, Mali, and Burkina Faso saw price declines, reflecting improved local supply and trade conditions. Millet prices rose modestly in Nigeria, Niger, and Mali, but declined in Burkina Faso, indicating localised supply dynamics. Sorghum prices decreased in Ghana, Nigeria, and Niger, while increasing in Mali and Burkina Faso, with localised market pressures evident in Burkina Faso's Kongoussi and Tenkodogo markets. Overall, the data reflects a combination of seasonal, economic, and regional factors influencing food price movements across West Africa.

Food Security Updates

East Africa is facing worsening food insecurity from June to September 2025, driven by conflict, climate shocks, and the lean season. South Sudan is in crisis, with escalating conflict, displacement, and limited humanitarian access fuelling hunger, malnutrition, and mortality. Famine (IPC Phase 5) is a risk in Nasir and Ulang counties due to conflict, disrupted supply routes, and expected flooding. Ethiopia remains a major concern, especially for rural communities, IDPs, and refugees in conflict-and drought-affected areas.

Food security across **Southern Africa** presents a mixed picture. While recently concluded harvests in Malawi, Mozambique, and Zimbabwe are generally improving food availability and driving down prices, boosting overall food security, the situation is less positive in specific areas. Southern Malawi and northern Mozambique are experiencing tempered improvements due to weather-affected crop yields.

Humanitarian food assistance needs remain atypically high across **West Africa** due to conflict, localised flooding, and displacement. In the Sahel, these shocks are expected to lead to a further increase in needs during the lean season, with affected households depleting food stocks early and facing high food prices. Needs are expected to stabilise in parts of the Gulf of Guinea with the start of seasonal harvests. **Burkina Faso, Mali, Niger and Nigeria** are areas of high concern.

Food Trade Updates

- The East African Community (EAC) has endorsed a groundbreaking Cross-border Payment System Masterplan, a bold five-year strategy designed to enhance the speed, affordability, and security of regional transactions. Approved during the 28th Ordinary Meeting of the EAC Monetary Affairs Committee (MAC) in May 2025, the initiative aims to tackle one of the most persistent barriers to intra-regional trade: inefficient and expensive cross-border payment systems.
- Starting next financial year, the Ugandan government will require all grain traded within or outside the country to carry a Quality Mark (Q-mark). The move aims to restore confidence in Uganda's grain exports following concerns from regional markets over substandard grain quality.
- Mozambique has officially dispatched its first shipment of goods under the African Continental Free Trade Area (AfCFTA), marking a significant step toward strengthening intra-African trade and deepening regional economic integration. The shipment, destined for Kenya, represents a major milestone in Mozambique's engagement with the AfCFTA framework and underscores its commitment to the continent's unified trade agenda.
- Nigeria and Benin have signed a new bilateral agreement aimed at strengthening their partnership and advancing regional integration in West Africa. The agreement was formalised on 21 June during the inaugural West Africa Economic Summit (WAES 2025). It focuses on facilitating trade, enhancing infrastructure development, and promoting greater regional cohesion.
- Nigeria and the Republic of Rwanda have signed a bilateral agreement to eliminate double taxation and prevent tax evasion. Described as a vital instrument for fostering cross-border investment, the agreement aims to provide tax certainty and protect individuals and businesses from being taxed twice on the same income.

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**) provides a summary trend in the fluctuations 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 June 2025 across 17 countries in Eastern, Southern, and Western Africa.

Burkina Faso, Mali, and Niger continue to be the most critical hunger hotspots in the region, with 56.6%, 69.1%, and 82.6% of their populations, respectively, experiencing insufficient food consumption (IFC) over the past 13 months. South Sudan and Uganda also remain significantly affected, with 44.5% and 42.2% of their populations facing IFC. In contrast, Nigeria has shown notable improvement. IFC levels in the country declined by 6.6% over the past month and by 43.8% compared to the same period last year. However, this positive trend is not uniform across the monitored countries. Uganda, Ghana, Togo, Rwanda, and South Sudan have all recorded substantial year-on-year increases in IFC levels.

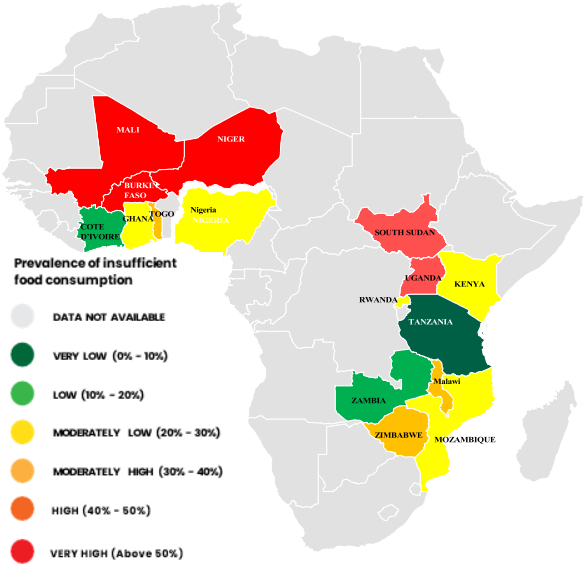
Average maize price trends over the past six and twelve months have been mixed. Significant price increases were observed in Uganda (41.5%), South Sudan (37.8%), Kenya (30.8%), and Zambia (28.2%), largely driven by seasonal supply declines and growing macroeconomic pressures. While most countries have experienced higher maize prices compared to a year ago, Ethiopia and Togo saw declines in average maize prices. Similarly, Mali and Niger recorded decreases in the average prices of imported rice.

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	●	-1.36	↓	7.54	↑
Ethiopia					3.70	↑	-3.17	↓
Ghana	0.00	●	61.54	↑	-0.45	↓		
Kenya	0.00	●	0.00	●	30.82	↑	36.27	↑
Malawi	0.00	●	0.00	●	12.22	↑	43.94	↑
Mali	0.00	●	0.00	●	-2.60	↓	-5.35	↓
Mozambique	0.00	●	0.00	●				
Niger	0.00	●	0.00	●	-19.14	↓	-23.81	↓
Nigeria	-6.62	↓	-43.82	↓	-6.50	↓		
Rwanda	0.00	●	38.46	↑	-6.98	↓		
South Sudan	0.00	●	36.11	↑	37.86	↑	107.07	↑
Tanzania	0.00	●	0.00	●	9.09	↑	60.00	↑
Togo	0.00	●	42.11	↑	-12.84	↓	-8.72	↓
Uganda	0.00	●	125.00	↑	41.51	↑	40.14	↑
Zambia	0.00	●	0.00	●	28.27	↑	5.25	↑
Zimbabwe	0.00	●	-18.18	↓	-13.63	↓	8.20	↑

Key: ● No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, June 2025

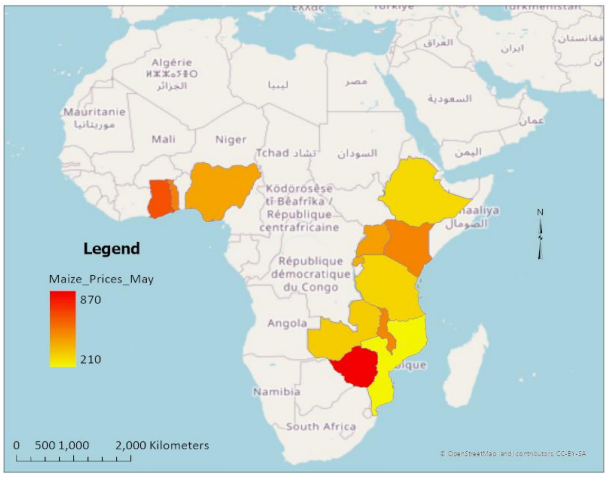


[1] People with Insufficient Food Consumption (IFC) refers to those with poor or borderline food consumption, according to the Food Consumption Score (FCS). The Food Consumption Score (FCS) is a proxy indicator for food security that measures the diversity of household diets and how frequently food is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

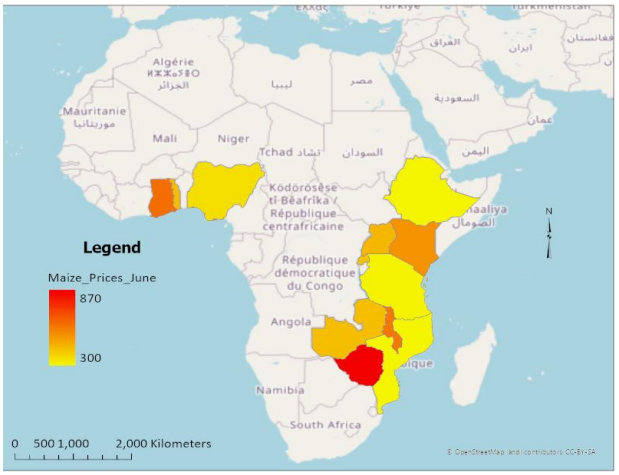
Figure 2 presents maize and rice prices across the monitored countries as of June 2025. Maize prices (in USD per metric tonne) were highest in Zimbabwe at USD 872/MT, followed by Ghana (USD 612/MT), Malawi (USD 594/MT), and Kenya (USD 525/MT). In contrast, the lowest maize prices were observed in Ethiopia, Tanzania, and Mozambique, each averaging around USD 300/MT. A similar pattern is evident for rice prices. Zimbabwe and Malawi recorded the highest rice prices at USD 2,235/MT and USD 2,133/MT, respectively, followed by Ghana (USD 1,522/MT) and Kenya (USD 1,261/MT). At the lower end, Nigeria and Burkina Faso reported the lowest rice prices at USD 712/MT and USD 733/MT respectively, with Mali and Niger also among the countries with relatively low prices.

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

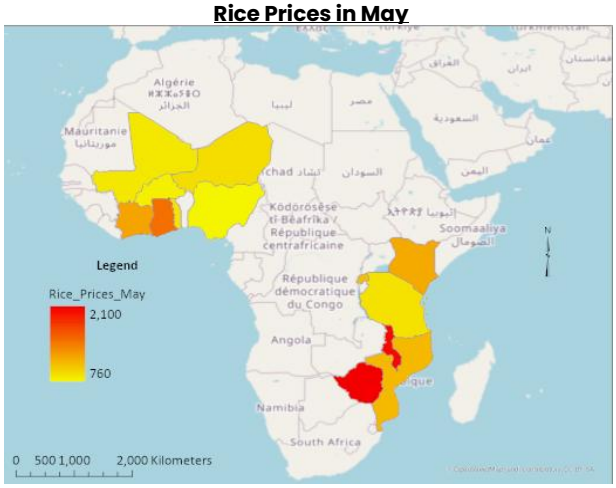
Maize Prices in May



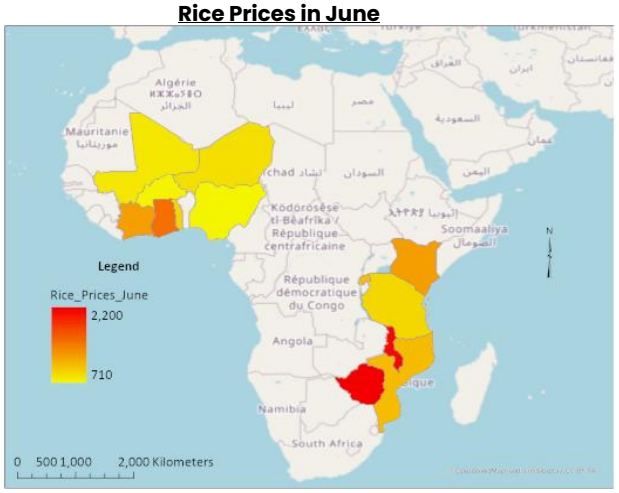
Maize Prices in June



Rice Prices in May



Rice Prices in June



Global Market Update

The FAO Food Price Index (FFPI) (**Figure 2**) rose slightly by 0.5% in June, driven by higher prices for dairy, meat, and vegetable oils, which offset declines in cereals and sugar. Global maize prices dropped sharply for a second month due to increased supplies from Argentina and Brazil. Sorghum and barley prices also fell. In contrast, wheat prices edged up despite harvest season pressures, amid weather concerns in key producers like Russia, the EU, and the US. The International Grains Council (IGC) Grain and Oilseeds Index (GOI) declined by 6.6% year-on-year in June 2025. This overall drop was driven by decreases across all sub-indices, except for maize and barley, which rose by 11.8% and 2.1% respectively. Rice recorded the steepest annual decline, falling by 32.5%. On a month-on-month basis, most sub-indices posted marginal declines compared to May 2025, with the only exception was soybeans, which saw a slight increase of 2.3%. The IGC has raised its forecast for global wheat production in the 2025/26 season by 2 million metric tons, bringing the total to 808 million.[2] The upward revision is mainly due to improved crop prospects in India and Romania. Conversely, the IGC has lowered its global maize production estimate for the same season by 1 million tons to 1.276 billion, citing a downgrade in Ukraine's output from 30 million to 28.6 million tonnes.

Figure 3: FAO Food Price Index (FFPI)3

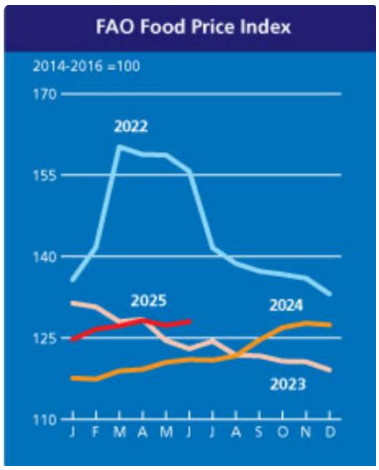


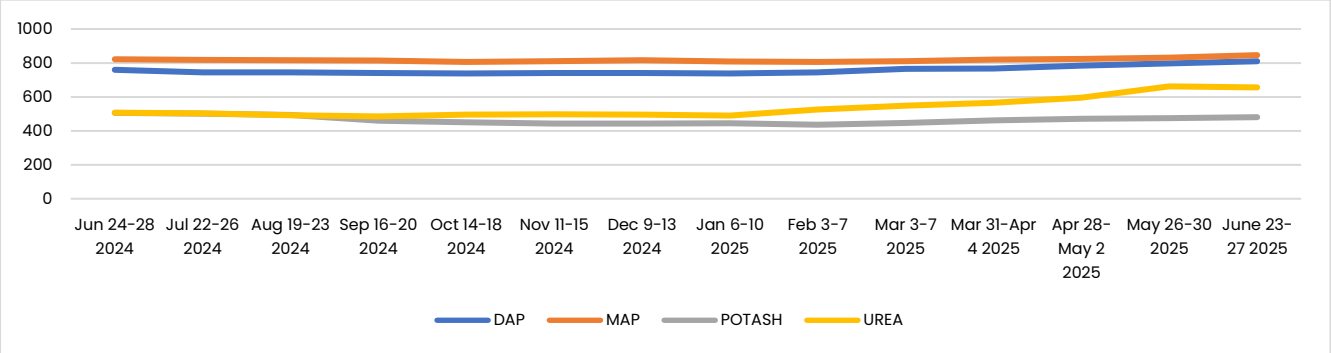
Table 2: IGC GOI Commodity Price Indices 4

Jan 2000 = 100	30-Jun	% Change 1M	% Change 1Y
GOI	213.67	-	*-6.62*
Wheat	196.49	*-2.00*	*-3.97*
Maize	218.44	*-2.56*	*11.79*
Rice	169.18	*-2.87*	*-32.56*
Soybeans	205.95	*2.33*	*-7.58*
Barley	219.37	*-1.41*	*2.13*

Global Fertiliser Prices

Over the past month, prices for most monitored fertilisers experienced slight increases, except for urea, which recorded a marginal decline of 0.9%. On a year-on-year basis, prices for all tracked fertilisers remain higher, except for potash, which is currently 4.9% lower than the same period last year. Urea registered the most significant annual increase at 29.6%, followed by DAP with a 6.6% rise.

Figure 4: Dry Fertiliser Prices ($/MT)



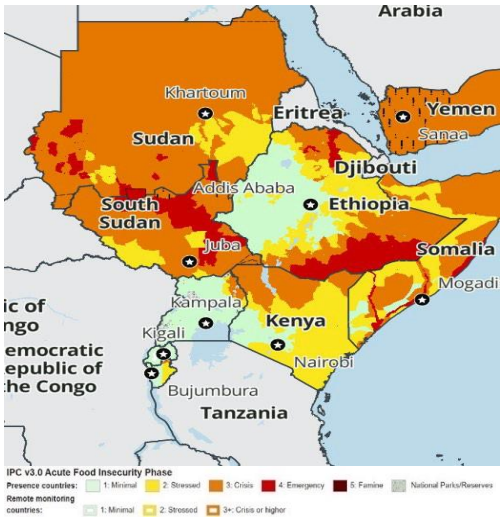
***Source**: Author's construction based on DTN* [5]

[2] IGC raises wheat crop outlook on India, Romania upgrades
[3] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[4] https://www.igc.int/en/markets/marketinfo-goi.aspx
[5] https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/05/28/urea-leads-major-fertilizer-prices

East Africa Food Insecurity Updates

Food Security Outlook

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



East Africa is facing worsening food insecurity from June to September 2025, driven by conflict, climate shocks, and the lean season. **South Sudan** is in crisis, with escalating conflict, displacement, and limited humanitarian access fuelling hunger, malnutrition, and mortality. Famine (IPC Phase 5) remains a risk in Nasir and Ulang counties due to conflict, disrupted supply routes, and expected flooding. **Ethiopia** remains a major concern, especially for rural communities, IDPs, and refugees in conflict-and drought-affected areas. Tensions and insurgency continue to drive acute food insecurity in Tigray, Amhara, and Oromia. Refugees from the DRC are also straining resources in Uganda and Burundi. Consequently, an estimated 15.8 million people are in need of food assistance, according to the latest East and Central Africa Region Food Security and Nutrition Working Group report.

Kenya shows mixed conditions. Southern regions benefit from good rains, improving food access. However, insecurity and flooding in northern and eastern areas have displaced communities and disrupted agriculture. Erratic rains in central Kenya have reduced crop yields and income for smallholders. **Uganda** also faces mixed outcomes. While harvests have begun in equatorial areas, delayed rains in central regions have hurt planting and crop maturity. The country is hosting over 1.9 million refugees, including 66,000 recent arrivals from eastern DRC, overwhelming services and infrastructure. Urgent and scaled-up humanitarian aid is needed, along with improved access to affected areas. Prioritising multisectoral support and protecting humanitarian corridors is critical to prevent rising malnutrition, disease, and mortality.

Prevalence of Insufficient Food Consumption

Since October 2024, the number of people facing insufficient food consumption has remained unchanged across the five selected East African countries (Table 3). However, compared to the same period last year, the current levels have increased significantly by 12.3 million people. Uganda has seen the largest increase from 8 million people in June 2024 to 18 million people in June 2025 (125%). This is followed by Rwanda (38.5%) and South Sudan (36.1%). In contrast, the number of people facing insufficient food consumption has remained unchanged in Kenya and Tanzania year-on-year basis.

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Kenya	51.40	13.60	13.60	26.46	0.00	0.00	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	36.11	-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	125.00	13.92

**Current month and **Previous month*

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

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

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

Commodity Prices

Key drivers of commodity prices in EA

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

Maize

Figure 6: National average price spreads for maize across select East African Countries[7]

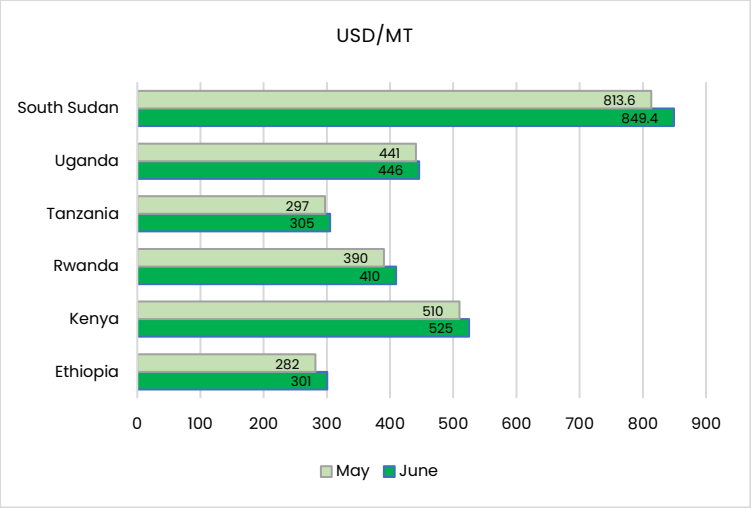


Figure 6 highlights the maize price distribution (in USD) across six Eastern African countries, all of which are currently experiencing month-on-month increases from May to June 2025. Based on data from the World Food Program (WFP), **South Sudan** is reporting the highest maize prices in the Eastern African region, with a 4.4% month-on-month increase, reaching USD 850/MT. This upward trend is indicative of persistent macroeconomic instability, notably driven by a significant depreciation of the national currency. The currency's decline is largely attributed to a reduction in oil export revenues, resulting from damage to key pipeline infrastructure traversing Sudan and disruptions in maritime shipments through the Red Sea[8].

Kenya continues to see rising maize prices for the fourth consecutive month, reaching USD 525/MT, a 3% increase from the previous month. This trend is attributed to reduced domestic supply and growing competition between human consumption and animal feed demand. In **Tanzania**, maize prices are increasing modestly by 2.8% month-on-month, reaching USD 305/MT. This is partly due to currency appreciation; however, Kenya's rising demand is likely exerting upward pressure on Tanzanian prices, prompting stakeholders to urge close monitoring of maize outflows and internal stock levels.

Similarly, **Uganda** is experiencing a slight uptick in maize prices, rising by 1.2% to USD 446/MT following recent currency appreciation. Conversely, **Rwanda** is seeing a more pronounced increase for the second consecutive month, with prices rising 5% month-on-month to USD 410/MT. This is driven by a combination of a weakening national currency, rising fuel prices, and increasing transportation costs.

Overall, maize prices in local currency across the East African region remain elevated compared to the past 1-12 months (**Table 4**), except for Tanzania, where the price compared to May 2025 has

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

[8] GIEWS https://www.fao.org/giews/countrybrief/country.jsp?code=SSD

remained stable. South Sudan records the most significant price surges among the five East African countries, standing at 5.11% and 285% higher than 1-12 months ago, respectively.

Kenya and Uganda have continued to experience upward trends in maize prices over the past year, with Kenya recording increases ranging from 3.15% to 36.27%, and Uganda from 14.41% to 41.51%. In contrast, Rwanda registered moderate price increases of 6.65% and 14.33% compared to the past one and three months, respectively, although prices remain 6.98% lower compared to six months ago. These prices reflect ongoing macroeconomic challenges and the depletion of maize stocks, largely driven by heightened demand in the region.

Table 4: Percentage changes in maize prices in East Africa[9]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,074.17	7.16 ↑	7.98 ↑	3.70 ▲	-3.17 ↘
Kenya	Maize	National Average, Retail, KES/KG	67.52	3.15 ▲	16.21 ⊗	30.82 ⊗	36.27 ⊗
Rwanda	Maize	National Average, Retail, RWF/Kg	585.56	6.65 ↑	14.33 ↑	-6.98 ↓	
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	3,848.49	5.11 ↑	60.32 ⊗	37.86 ⊗	107.07 ⊗
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	80,000.00	0.00 ●	-5.88 ↓	9.09 ↑	60.00 ⊗
Uganda	Maize (flour)	National Average, Retail, UGX/Kg**	2,451.68	2.73 ▲	4.93 ▲	7.67 ↑	-13.16 ↓
Uganda	Maize (white)	National Average, Retail, UGX/Kg**	1,593.68	14.41 ↑	22.78 ⊗	41.51 ⊗	40.14 ⊗

Note: Last price is for June 2025, * May 2025, and ** April 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[10]

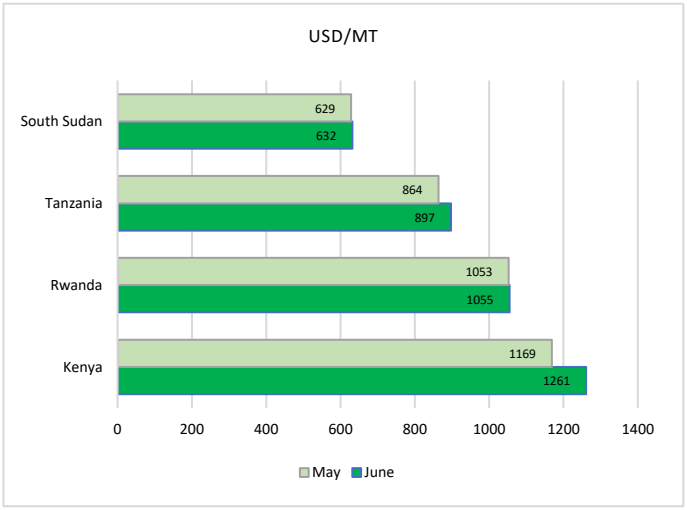


Figure 7 illustrates the rice price spread in USD across four select Eastern Africa countries, with all countries experiencing price increases compared to previous month. Following an 8.39% price decrease in May, **Kenya's** price has spiked by 7.3% month-on-month to USD 1261/MT making it the highest in the region. Similarly, **Tanzania's** rice has increased by 3% partly attributed to currency appreciation and rising demand from the region.

Conversely, **Rwanda's** prices remained moderate with negligible price increases like South Sudan at USD 1055/MT and USD632/MT respectively. It is worth noting that despite the ongoing macroeconomic instabilities, **South Sudan** has the lowest-priced rice in the region, even lower than Tanzania.

The local currency price trends (**Table 5**) mirror these patterns, with all countries recording slight to moderate month-on-month price increases. Notably, Kenya's rice price rose by 7.96%, 1.29% and 3.0% compared to the past one, three and 12 months respectively but remains slightly lower than 6 months ago by 0.82%. Rwanda's rice price is consistently high compared to the past one, three, and six months by 1.88%, 6.48% and 12.02% respectively due to increased domestic demand and limited local supply. Conversely, although South Sudan and Tanzania offer the lowest prices in USD, their domestic local retail prices remain considerably compared to the past 1-year by 105.08% and 17.50% respectively. Such price volatility is attributed to macroeconomic challenges, seasonal variabilities, and increasing demand.

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

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

Table 5: Percentage changes in rice prices in East Africa[11]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	162.09	7.96 ↑	1.29 ▲	-0.82 ↘	3.00 ▲
Rwanda	Rice	National Average, Retail, RWF/Kg	1,508.21	1.88 ▲	6.48 ↑	12.02 ↑	
South Sudan	Rice	National Average, Retail, SSP/Kg*	2,863.59	1.07 ▲	13.72 ↑	8.36 ↑	105.08 ⊗
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	235,000.00	1.08 ▲	3.30 ▲	17.50 ⊗	17.50 ⊗

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

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

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

Beans

Figure 8: National average price spreads for beans across select East African Countries[12]

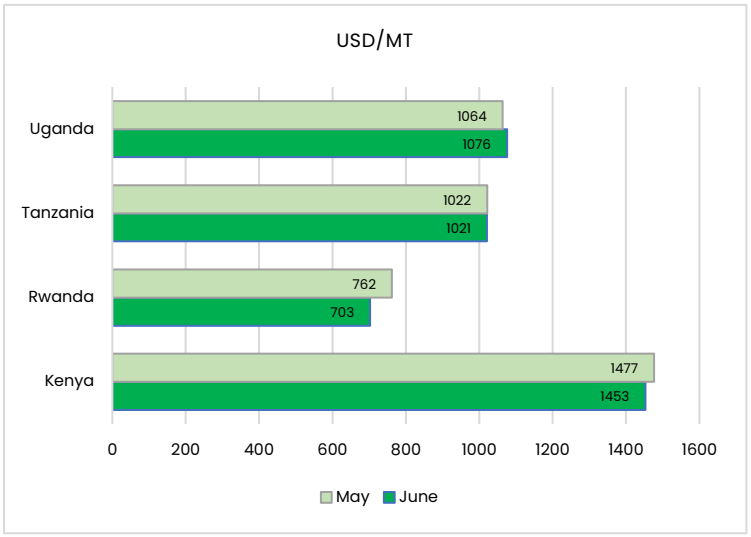


Figure 8 illustrates the price trends of beans in USD across four selected East African countries. Owing to favourable green harvests and effective stock maintenance earlier in the year, prices in **Tanzania** and **Rwanda** have remained stable or moderately lower by 0.1% and 7.8% respectively, with prices reaching USD 1,021/MT and USD 703/MT, with the latter being the lowest prices in the region by far. Similarly, **Kenya** recorded a modest month-on-month decrease by 1.7% to USD 1,453/MT, though it still holds the highest bean price in the region, attributed to both domestic and export demand in the region.

In contrast, **Uganda** recorded a modest 1% increase in bean prices month-on-month, partly attributed to currency appreciation, but also to limited domestic supply. In local currencies, as shown in **Table 6**, the bean prices in the region show mixed trends compared to the past month. Notably, compared to the past month, Rwanda, Tanzania, and Kenya's *Yellow* beans have experienced low to moderate price decreases of 6.24%, 0.93% and 1.53% respectively, likely influenced by the seasonal abundance of the commodity during the green harvest season. Conversely, Kenya's Red Beans (Haricot Wairimu) price has shown consistent increases compared to the past one to 12 months ranging from an 18.69% rise to 25.87%. In contrast, seasonal shifts and constrained supply in Uganda have continued to affect the price of beans over the past one to 12 months, with price surges ranging from 5.5% to 20.08%[13].

Table 6: Percentage changes in bean prices in East Africa[14]

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

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

[13] See https://nilepost.co.ug/business/262147

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	186.71	-1.53 ↘	2.52 ▲	0.31 ▲	2.67 ▲
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	172.00	23.83 ⊗	18.69 ⊗	21.96 ⊗	25.87 ⊗
Rwanda	Beans	National Average, Retail, RWF/Kg	1,004.37	-6.24 ↓	1.18 ▲	-13.02 ↓	
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	267,500.00	-0.93 ↘	-1.83 ↘	-5.59 ↓	2.88 ▲
Uganda	Beans	National Average, Retail, UGX/Kg**	4,098.17	6.62 ↑	13.05 ↑	5.50 ↑	20.08 ⊗

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

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

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

Wheat

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

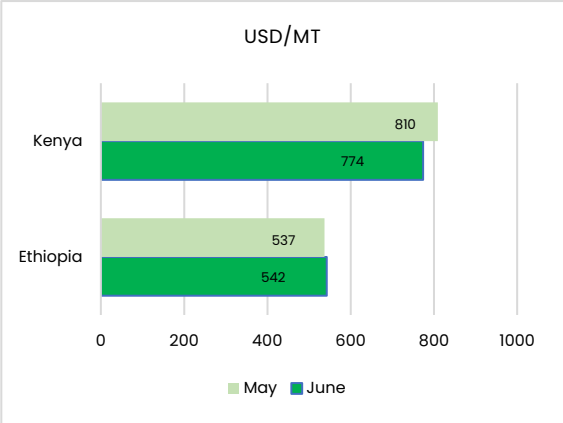


Figure 9 presents wheat price trends in USD for two selected East African countries Kenya and Ethiopia, highlighting contrasting market dynamics. In **Kenya,** wheat prices declined by 5%, reaching USD 774/MT, primarily due to a drop in global wheat prices driven by strong harvests in the Black Sea region and substantial exports from Russia.[15]. In contrast **Ethiopia** experienced a 1% increase in wheat prices, reaching USD 542/MT, largely attributed to rising regional demand and the impact of the lean season. However, the global price decline likely tempered what could have been a more significant price increase.

Similar patterns are reflected in local currency terms (**Table 7),** where Kenya's wheat prices fell by 4.28% month-on-month, yet remain elevated ranging between 3.34% and 9.59% compared to levels observed over the past 3 to 12 months. In Ethiopia, prices rose 1% month-on-month and remain higher than 6- and 12-month levels by 6% and 2.7%, respectively. However, compared to March 2025 (the start of the Belg *season*[16]), prices are 4.92% lower. Looking ahead, rising demand and stock depletion in Ethiopia are expected to continue exerting upward pressure on wheat prices through September, coinciding with the harvest period.

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	7,349.92	1.09 ▲	-4.92 ↘	6.06 ↑	2.72 ▲
Kenya	Wheat	National Average, Retail, KES/KG	99.54	-4.28 ↘	6.24 ↑	3.34 ▲	9.59 ↑

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

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

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

Fertiliser

The fertiliser markets in Kenya and Rwanda present a stark contrast in terms of price volatility and market stability, reflecting differing economic dynamics, policy frameworks, and possibly supply chain structures. In **Kenya**, prices are highly volatile Calcium Ammonium Nitrate (CAN) surged by 40.16% in the past month and 82.03% over the year, indicating market instability. In contrast, DAP and NPK prices declined over the past 1 and 3 months (DAP: -1.80%, -9.62%; NPK: -3.09%, -3.64%), though they remain significantly higher

[15] Relief Web Food Security Update (June) https://reliefweb.int/report/world/food-security-update-june-13

[16] Belg season Is the short rain season In Ethiopia starting from March-May

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

year-on-year (+33.75% and +14%, respectively). These shifts may reflect global price corrections, import costs, or policy changes. Meanwhile, **Rwanda**'s market remains stable. NPK prices rose only 1% month-on-month and 8% over six months, with no annual change. Urea declined 4% in the past month, with a modest 7% annual increase, suggesting a controlled and gradually adjusting market.

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	101.85	40.16 ⊗	8.67 ↑	12.00 ↑	82.03 ⊗
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	112.67	-1.80 ↘	-9.62 ↓	-7.78 ↓	33.75 ⊗
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	101.43	-3.09 ↘	-3.64 ↘	25.28 ⊗	14.01 ↑
Rwanda	NPK	National Average USD/50kg	741.00	1.61 △	-0.06 ↘	8.37 ↑	
Rwanda	Urea	National Average USD/50kg	705.71	-4.76 ↘	-4.74 ↘	7.39 ↑	

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**, seasonal rainfall has been marked by irregular spatial and temporal patterns, with some regions experiencing intense rainfall punctuated by dry spells. Agricultural fields across the area show crops at varying stages of development, from early vegetative growth to full maturity. Climate forecasts for June to August suggest a shift in rainfall distribution toward the north and west, moving away from the traditionally bimodal equatorial zones.

In **Kenya**, the planting and development of long rains cereals is ongoing. Western regions, including Central, Rift Valley, and Western provinces, experienced a timely onset of rains with significantly above-average rainfall up to 40% higher in the south-western maize belt supporting strong crop growth. In contrast, eastern bimodal and marginal areas also received above-average rains, but late planting, dry spells, and early cessation of rains have hindered crop development. Forecasts suggest continued above-average rainfall through September, except for the eastern and southeastern coast, where below-average rains are expected.

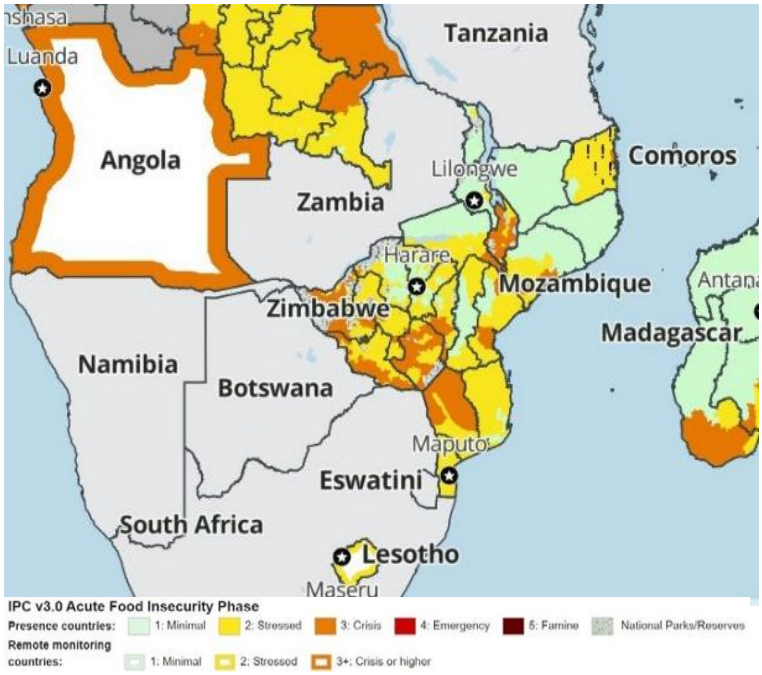
In **Uganda**, the first season cereal harvesting is underway in bimodal areas, while crops are still developing in the unimodal northeast. Although recent rains improved conditions in the west, limited rainfall in the northwest has affected crops, though recovery is possible with expected above-average rains. **Rwanda** has begun harvesting season B maize, but dry conditions from February to May, may reduce yields.

In **Burundi**, season B maize harvesting is starting, and season B rice is progressing well with near-normal vegetation. In **Tanzania**, the Msimu cereal harvest has concluded under mostly favourable conditions despite erratic rainfall and February dryness, with some concerns in Morogoro over reduced crop biomass. In the bimodal north and coastal areas, Masika cereals are developing for a July harvest, and Vuli sorghum harvesting has just begun under favourable conditions.

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

Southern Africa Food Security Update

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



Food security across **Southern Africa** presents a mixed picture. While the just concluded harvests in Malawi, Mozambique, and Zimbabwe are generally improving food availability and driving down prices, boosting overall food security, the situation is less positive in specific areas. Southern **Malawi** and northern **Mozambique** are experiencing tempered improvements due to weather-affected cereal crop yields. Conflict continues to disrupt food security in parts of Cabo Delgado, Mozambique, causing displacement and hindering agricultural and market activities. While the overall harvest is favourable, some subnational deficits are expected in Malawi, requiring close monitoring.

Prevalence of Insufficient Food Consumption

For the fifth consecutive month, there has been no change in the number of people experiencing insufficient food consumption across the four monitored Southern African countries (Malawi, Mozambique, Zambia, and Zimbabwe) (**Table 9**). However, compared to the same period in 2024, the region has seen a 4.7% decrease, equivalent to 1.1 million fewer people facing food insecurity. This improvement is entirely attributed to Zimbabwe, which recorded an 18.2% year-on-year decline in the number of people with insufficient food consumption as of June 2025.

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

Country	Total Population (millions)	People with insufficient food consumption (millions)*	People with insufficient food consumption (millions)**	Percentage of total population with insufficient food for consumption (%)	Change in people with insufficient food consumption from previous month (%)	Change in people with insufficient food consumption from 1yr ago (%)	Change in people with insufficient food consumption from 2yrs ago (%)
Malawi	18.10	6.80	6.80	37.57	0.00 ●	0.00 ●	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%)*

[19] Author's construction based on HungerMap

Commodity Prices

Key drivers of prices in the Southern Africa region

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

Maize

Figure 11: National average price spreads for maize across select Southern African Countries[20]

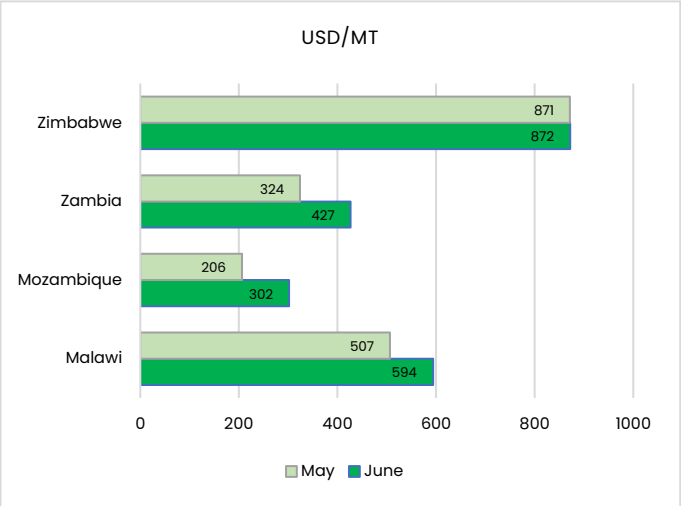


Figure 11 illustrates maize prices in USD across three Southern African countries: **Zimbabwe, Zambia, Mozambique,** and **Malawi**. The illustration shows a general price increase across four countries, except for Zimbabwe where prices have remained largely stable at around USD 872/MT. In contrast, Zambia s experienced a significant surge of 31.79%, with prices climbing to USD 427/MT. per Mozambique recorded the highest soar by 46.60%, as prices jumped to USD302/MT with Malawi experiencing a subtle 17.2% increase to USD 594/MT month-on-month respectively. These mixed trends are largely due to currency fluctuations, seasonal harvest variations.

As shown in **Table 10**, maize prices in local currency have generally increased over the past month in Malawi, Mozambique, and Zambia, rising by 18.79%, 46.08%, and 31.74%, respectively. This upward trend is particularly concerning given that these countries have only recently concluded their harvest season. However, it is important to note that current prices remain significantly lower compared to levels observed three months ago, just before the harvest, declining by 28.33%, 39.70%, and 12.58% in Malawi, Mozambique, and Zambia, respectively. Maize and maize meal prices in Zimbabwe have remained relatively low and stable over the past one to six months, with maize prices fluctuating between 0.21% and 27.54%, and maize meal prices ranging from 7.89% to 16.92%; however, both commodities are currently priced significantly higher than they were a year ago.

Table 10: Percentage changes in maize prices in Southern Africa[21]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,023.33	16.79 ⊗	-28.33 ↓	12.22 ↑	43.94 ⊗
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	19.06	46.08 ⊗	-39.70 ↓		
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	11.89	31.74 ⊗	12.58 ↑	28.27 ⊗	5.25 ↑
Zimbabwe	Maize	Epworth, USD/kg*	0.97	-0.21 ↘	-7.72 ↓	-27.54 ↓	47.79 ⊗
Zimbabwe	Maize meal	Bulawayo, USD/kg*	0.81	-7.89 ↓	-16.92 ↓	-13.63 ↓	8.20 ↑

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

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

[21] 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

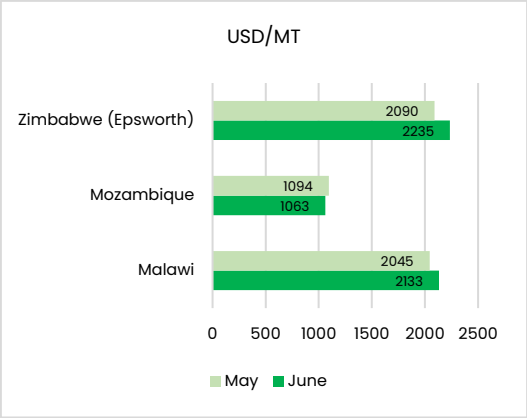


Figure 12 presents rice prices in USD for Zimbabwe, Mozambique, and Malawi, with the former recording the highest prices at USD 2,235/MT, representing a 6.9% spike month-on-month. A similar trend can be observed in Malawi, where prices have surged by 4.3% over the same period to USD 2,133/MT, with both countries affected by increased demand and supply limitations. In contrast, Mozambique has seen a slight decline in prices, dropping to USD 1,063/MT, a 2.83% decrease month-on-month, suggesting improved supply conditions due to the heightened importation of rice observed early this year following poor harvests[22].

Similar trends can be seen in Table 11, where local rice prices have shown upward momentum in Malawi and Zimbabwe, increasing by 4.3% and 6.94% respectively, on a month-on-month basis. In contrast, Mozambique has experienced a decline, with rice prices falling by 2.89% and 3.91% compared to one and three months ago, respectively.

Table 11: Percentage changes in rice prices in Southern Africa[23]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	3,675.56	4.30 ▲	-9.84 ↓	59.62 ⊗	
Mozambique	Rice (imported)	National Average, MZN/Kg	67.17	-2.89 ↘	-3.91 ↘		
Zimbabwe	Rice	Epworth, USD/kg*	2.24	6.94 ↑	6.43 ↑	27.35 ⊗	77.38 ⊗

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

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

Beans

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

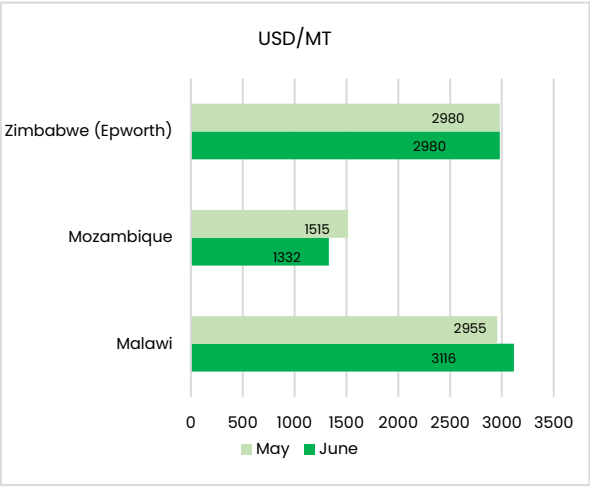


Figure 13 presents bean prices in USD across selected Southern African countries showing divergent trends. In Zimbabwe, prices remained unchanged at USD 2,980/MT, indicating a stable market with no month-on-month variation. In contrast, Mozambique experienced a notable price decline, with values falling by 12% month-on-month to USD 1,332/MT due to improved supply conditions on the crop. Meanwhile, Malawi saw a moderate price increase, with prices rising to USD 3,116/MT, a 5.46% gain, reflecting supply constraints. These contrasting movements highlight varying market pressures across the region, with stability in Zimbabwe, declining prices in Mozambique, and rising costs in Malawi.

Similarly, **Table 12** further demonstrates the local bean prices in these countries, with Malawi showing high prices compared to the previous month on beans and soybeans up by 5.43% and 3.75% respectively. However, when compared to three months ago, prices remained lower by 6.38% and 15.99%, respectively, suggesting a partial recovery from earlier declines. In contrast, Mozambique has maintained consistently low prices, with reductions of 12% and 24.75% over the past one to three months, indicating a more stable

[22] https://southernafricantimes.com/mozambiques-rice-import-bill-reaches-historic-high-following-agricultural-decline

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

or oversupplied market. Similarly, Zimbabwe has seen stable or declining prices over the past one to six months, with changes ranging from 0.67% to 41.80%, reflecting a downward trend in the short to medium term. However, a year-on-year comparison reveals a stark contrast: bean prices in Zimbabwe remain 47% higher than the same period last year, underscoring the lingering impact of previous drought conditions and the slow pace of market recovery.

Table 12: Percentage changes in bean prices in Southern Africa[24]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	5,388.89	5.43	-6.38	33.10	
Malawi	Soyabeans	National Average, MWK/Kg	2,075.00	3.75	-15.99	0.11	
Mozambique	Beans	National Average, MZN/Kg	84.17	-12.10	-24.75		
Zimbabwe	Beans	Epworth, USD/kg*	2.98	0.00	-0.67	-41.80	47.52

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

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

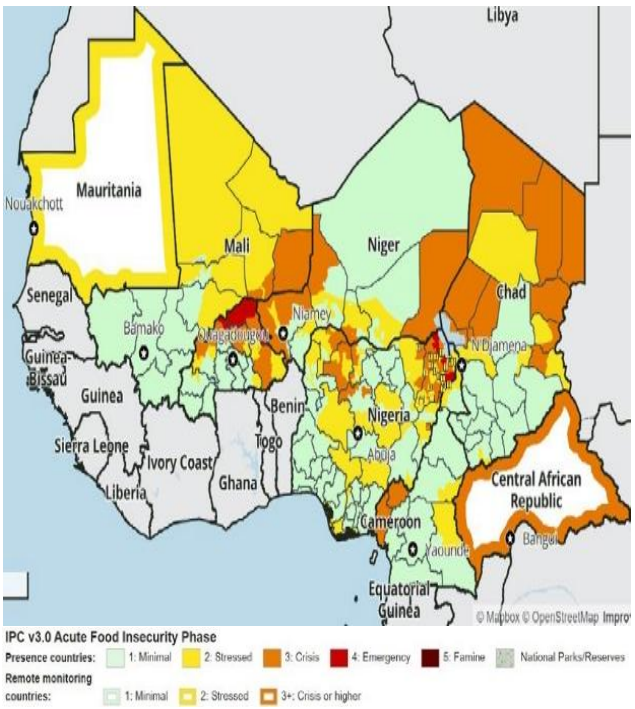
Seasonal Monitor and Cropping Conditions

In **Malawi**, maize production in 2025 is projected to increase by 10 % compared to 2024. However, localised deficits are anticipated in the southern and northern regions due to irregular rainfall and dry spells.[25] In **Mozambique**, the 2025 harvest is expected to be mixed. While the southern regions are likely to see favourable yields thanks to good rainfall, the northern areas face challenges from dry conditions, tropical cyclones, and ongoing conflict, which are expected to negatively impact production. Meanwhile, in **Zimbabwe**, winter wheat and second-season planting are underway under generally favourable conditions.

[24] Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia
[25] FEWSNET, June 2025

West Africa Food Security Update

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



Humanitarian food assistance needs remain high across **West Africa** due to conflict, localised flooding, and displacement. In the Sahel, these shocks are expected to lead to a further increase in needs during the lean season, with affected households having depleted food stocks early and facing high food prices. Needs are expected to stabilise in parts of the Gulf of Guinea with the start of seasonal harvests. **Burkina Faso, Mali, Niger and Nigeria** are areas of high concern. Conflict restricts household movements and impedes access to markets, farmland, and labour opportunities. These impacts are particularly severe in areas controlled or contested by VEOs in the Liptako-Gourma regions of Burkina Faso, Mali, and Niger, and Northeast Nigeria. Economic conditions remain precarious across much of West Africa due to conflict-related disruptions, political instability, and broader macroeconomic pressures.

Prevalence of Insufficient Food Consumption

The number of people facing insufficient food consumption across seven selected West African countries declined from 122.4 million in May 2025 to 118.4 million in June 2025 (**Table 13**). This improvement is entirely driven by Nigeria, which has shown a marked recovery in food security since October 2024. The number of food-insecure individuals in Nigeria dropped significantly from 108.4 million in September 2024 to 56.4 million in June 2025. This regional improvement also reflects a positive trend compared to previous years, with lower figures than June 2024 (158.4 million) and June 2023 (119.2 million). However, not all countries followed this trend. Ghana and Togo recorded sharp year-on-year increases in food insecurity, rising by 61.5% and 42.1%, respectively.

Table 13: Prevalence of Insufficient Food Consumption in selected West African countries (June 2025)[26]

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 ●	61.54 ↑	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	56.40	60.40	29.78	-6.62 ↘	-43.82 ↓	-14.42 ↓
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%)

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

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.

Maize

Figure 15: Price spreads for maize across select West African Countries[27]

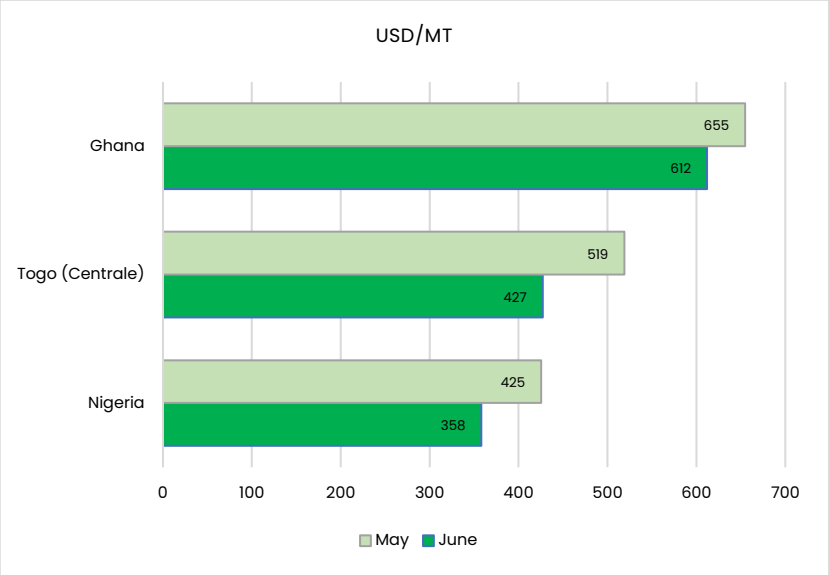


Figure 15 presents the distribution of maize prices across Ghana, Togo (Centrale), and Nigeria, showing a consistent downward trend month-on-month. In Ghana, prices declined by 6.56 % to USD 612/MT, reflecting improved supply conditions in the country. In Togo's Centrale region, a more pronounced drop is experienced, with prices falling by 17.73% to USD 427/MT, which is a result of currency appreciation of the US Dollar. Similarly, Nigeria saw a 15.76% price decrease to USD 358/MT, attributed to favourable harvests. Overall, the data indicates a regional softening in prices, likely driven by improved availability of food supplies across West Africa.

Table 14 further highlights varied trends in white maize prices in local currencies across Ghana, Nigeria, and Togo, reflecting localised supply-demand dynamics and broader regional influences. In Ghana, prices have steadily declined over the past six months, with reductions of 6.09% month-on-month, 5.49% over three months, and 0.45% over six months, suggesting easing market pressures likely due to improved supply or lower demand. Nigeria has experienced greater volatility. Prices fell sharply by 18.26% in the last month, despite a 3.57% rise over three months, and declined 6.50% over six months, indicating a recent correction following earlier increases. In Togo, regional variations are evident in the Centrale region, prices increased by 3.02% month-on-month and 4.37% over three months but declined by 15.85% over six months. In the Maritime region, a 1.73% decrease was felt in the past month, although prices rose by 5.58% over three months, reflecting short-term fluctuations. Finally, in the Savanes region, prices have consistently declined across all timeframes 4.52% month-on-month, 9.05% over three months, and 11.34% over six months—suggesting ongoing supply surpluses.

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

Table 14: Percentage changes in maize prices in West Africa[28]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	6,312.30	-6.09	-5.49	-0.45	
Nigeria	Maize (white)	National Average, NGN/KG	552.16	-18.26	3.57	-6.50	
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg	239.00	3.02	4.37	-15.85	-3.63
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg	227.00	-1.73	5.58	-11.33	-17.15
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg	211.00	-4.52	-9.05	-11.34	-5.38

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

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

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

Rice

Figure 16: Price spreads for rice across select West African Countries[29]

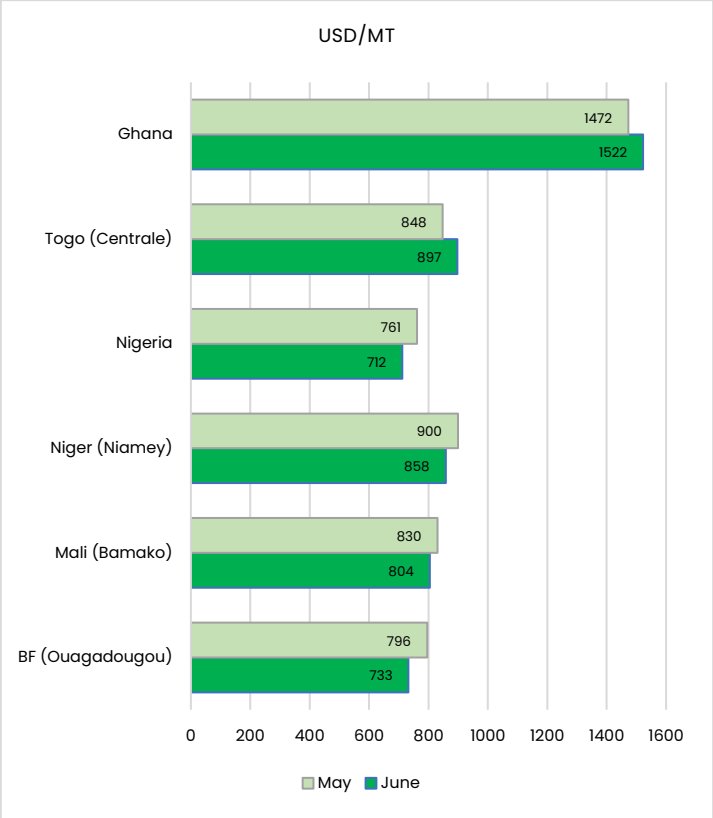


Figure 16 illustrates rice price movements across six West African countries—Ghana, Togo (Centrale), Nigeria, Niger (Niamey), Mali (Bamako), and Burkina Faso (Ouagadougou) comparing prices in May and June. The data reveal mixed trends across the region. Ghana and Togo (Centrale) recorded increases of 3.4% and 5.78%, reaching 1,522 USD/MT and 897 USD/MT, respectively, likely due to rising demand and currency effects. In contrast, Nigeria, Niger (Niamey), Mali (Bamako), and Burkina Faso (Ouagadougou) experienced declines ranging from 3.13% to 7.91%, with June prices falling to USD 712/MT, USD 858/MT, USD 804/MT, and USD 733/MT, respectively. These shifts reflect diverse market conditions influenced by local supply, trade, and economic factors.

Table 15 further illustrates that, in local currency terms, rice prices have rather stabilised or declined compared to the past 1-12 months in the majority of the markets across these countries, with very few exceptions. For instance, Burkina Faso's Bobo market has recorded higher prices compared to the past 1-12 months, ranging from 1.19% to 14.86%. Similarly, Ghana has also seen higher rice prices compared to past 1-3 months, rising by 3.91% and 7.19% respectively, though it remains lower than six months ago by 2.9%.

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

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

Table 15: Percentage changes in rice prices in West Africa[30]

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	14.86	6.25	1.19	1.19
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	-9.09	3.09
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	56,000.00	0.00	0.00	0.00	-1.75
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	50,000.00	0.00	0.00	0.00	19.05
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	41,000.00	-10.87	-10.87	-15.46	-11.83
Cote d'Ivoire	Rice	Abidjan, Retail, XOF/Kg**					
Ghana	Rice	National Average, (GHS/MT)	15,703.57	3.91	7.19	-2.91	
Mali	Rice	Bamako, Wholesale, XOF/100 KG	45,000.00	-6.25	-6.25	-2.17	-5.26
Mali	Rice	Gao, Wholesale, XOF/100 KG	65,000.00	0.00	0.00	0.00	0.00
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	-3.70	-3.70	-3.70	0.00
Mali	Rice	Mopti, Wholesale, XOF/100 KG	48,000.00	-2.04	-2.04	-4.00	9.09
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	45,000.00	-2.17	-5.26	0.00	-6.25
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	45,000.00	-6.25	-6.25	2.27	0.00
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	60,000.00	0.00	0.00	0.00	0.00
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	38,000.00	0.00	-1.30	-5.00	-16.48
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	48,000.00	-4.00	-4.00	-4.00	-4.00
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	45,000.00	-6.25	-13.46	-6.25	-6.25
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	520.00	-13.33	-21.21	-18.75	-25.71
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	470.00	-12.96	-21.67	-26.56	-26.56
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	480.00	0.00	-7.69	-22.58	-25.00
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	480.00	-7.69	-14.29	-19.46	-27.27
Nigeria	Rice (milled)	National Average, NGN/KG	1,097.59	-9.18	8.56	-12.02	
Togo	Rice (imported)	Centrale,Retail, XOF/Kg	502.00	2.87	-0.20	-2.90	-1.18
Togo	Rice (imported)	Maritime,Retail, XOF/Kg	512.00	-6.23	-2.29	-21.95	-18.73
Togo	Rice (imported)	Savanes,Retail, XOF/Kg	504.00	-11.73	-6.49	-21.50	-32.44

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

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

Millet

Figure 17: Price spreads for millet across select West African Countries[31]

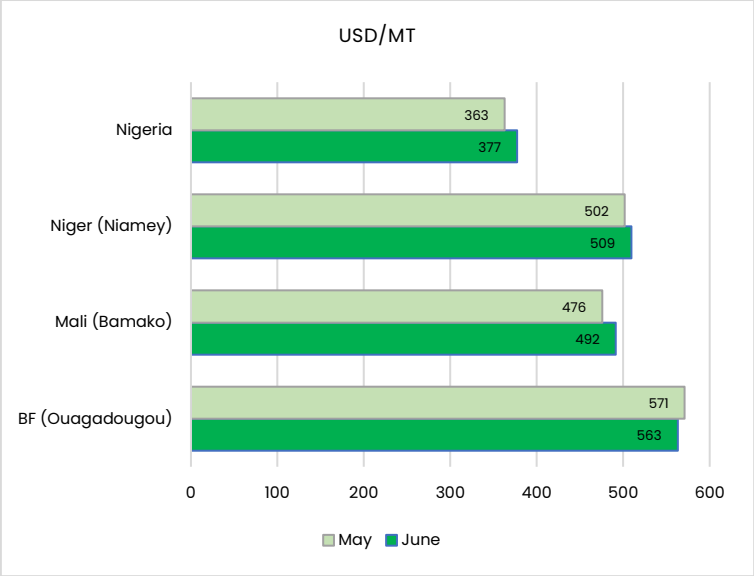


Figure 17 displays millet prices in USD across selected West African countries. In Nigeria, prices increased by 3.86%, to USD 377/MT, reflecting increased demand and supply constraints. Niger (Niamey) saw a 1.39% uptick, with prices moving to USD 509/MT, indicating stable but slightly rising market conditions. Similarly, Mali (Bamako) recorded a 3.36% increase, with prices climbing from USD 476/MT to USD492/MT, suggesting upward pressure due to seasonal factors and trade dynamics. In contrast, Burkina Faso (Ouagadougou) experienced a 1.4% decline, with prices falling to USD 563/MT, potentially due to improved local supply.

Furthermore, Table 16 shows that millet prices in local currency have stabilised or declined compared to the past 1-12 months in the majority of the markets in these countries, with very few exceptions. For instance, Burkina Faso's Tenkodogo market has recorded high prices compared to the past 1-12 months,

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

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

ranging from 2.35% to 33.85%. Mali's Sikasso market also sees price spikes of 20% and 15.38% compared to the past 1 and 12 months. Overall, the data reflect mild, stable, or upward trends in millet prices across most countries, with Burkina Faso being the exception, highlighting localised market variations.

Table 16: Percentage changes in millet prices in select West African Countries[32]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	38,000.00	0.00	0.00	5.56	16.92
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	30,000.00	-7.69	-7.69	-14.29	3.45
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	40,000.00	0.00	-2.44	-9.09	14.29
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	33,000.00	0.00	0.00	3.13	17.86
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00	0.00	0.00	13.33
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	32,500.00	0.00	-7.14	-7.14	30.00
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	31,500.00	-4.55	-7.35	-7.35	0.00
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg	43,500.00	2.35	8.75	16.00	33.85
Mali	Millet	Bamako, Wholesale, XOF/100 KG	27,500.00	0.00	-14.06	-16.67	5.77
Mali	Millet	Gao, Wholesale, XOF/100 KG	37,500.00	0.00	0.00	-12.79	7.14
Mali	Millet	Kayes, Wholesale, XOF/100 KG	30,000.00	3.45	-14.29	-21.05	7.14
Mali	Millet	Mopti, Wholesale, XOF/100 KG	29,000.00	-7.94	-9.38	-1.69	0.00
Mali	Millet	Ségou, Wholesale, XOF/100 KG	25,000.00	-3.85	-16.67	0.00	-1.96
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	30,000.00	20.00	-7.69	0.00	15.38
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	35,000.00	6.06	-7.89	0.00	2.94
Niger	Millet	Agadez, Wholesale, XOF/Kg	400.00	0.00	0.00	33.33	5.26
Niger	Millet	Dosso, Wholesale, XOF/Kg	250.00	-7.41	-12.28	0.00	-30.56
Niger	Millet	Maradi, Wholesale, XOF/Kg	255.00	2.00	-7.27	-3.77	-17.74
Niger	Millet	Niamey, Wholesale, XOF/Kg	285.00	-1.72	-5.00	-3.39	-18.57
Niger	Millet	Tillaberi, Wholesale, XOF/Kg	300.00	-3.23	0.00	0.00	-21.05
Niger	Millet	Zinder, Wholesale, XOF/Kg	320.00	6.67	-3.03	6.67	3.23
Nigeria	Millet	National Average, NGN/KG	581.28	0.90	-0.70	-13.55	

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

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

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries[33]

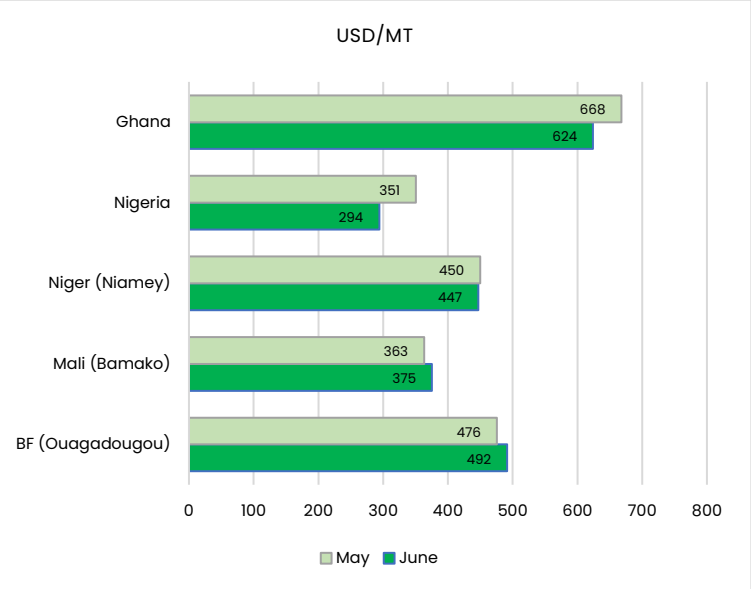


Figure 18 highlights the USD price spread of sorghum across five selected West African countries. Ghana recorded a 6.59% decrease, with prices reaching USD 624/MT. Nigeria saw the steepest decline at 16.24%, dropping to USD 294/MT, while Niger (Niamey) experienced a slight 0.67% decrease, settling at USD 447/MT. In contrast, Mali (Bamako) registered a 3.31% increase, with prices rising to USD 375/MT, and Burkina Faso (Ouagadougou) saw a 3.36% increase, reaching USD 492/MT.

Table 17 indicates that sorghum prices in local currencies have generally remained stable or declined across most of the selected markets over the past 1 to 6 months. However, notable exceptions are observed in Kongoussi and Tenkodogo markets in Burkina Faso, where prices have shown moderate to significant increases over the past 1 to 12 months. In Tenkodogo, prices are elevated by 5.56%

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

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

to 50%, while in Kongoussi, increases range from 9% to 20%, highlighting localised upward pressure in these markets.

Table 17: 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	22,000.00	-2.22	-6.38	2.33	-2.22
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	25,000.00	-33.33	-1.96	0.00	0.00
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	34,000.00	-2.86	-2.86	0.00	4.62
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	27,000.00	0.00	3.85	8.00	3.85
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	30,000.00	9.09	20.00	20.00	20.00
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	25,000.00	0.00	0.00	-9.09	11.11
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	25,500.00	-7.27	-7.27	15.91	-7.27
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	28,500.00	5.56	1.79	50.00	18.75
Ghana	Sorghum	National Average, (GHS/MT)	6,438.10	-6.09	1.03	-16.39	
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	21,000.00	0.00	-16.00	-8.70	-14.29
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	25,000.00	0.00	0.00	-7.41	-3.85
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	24,000.00	0.00	0.00	-14.29	-11.11
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	22,000.00	0.00	0.00	10.00	-2.22
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	22,000.00	4.76	-2.22	-12.00	4.76
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	35,000.00	9.38	2.94	6.06	7.69
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	400.00	0.00	11.11	23.08	29.03
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	250.00	-7.41	-10.71	0.00	-28.57
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	220.00	-2.22	-6.38	-4.35	-33.33
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	250.00	-3.85	-10.71	-10.71	-28.57
Niger	Sorghum	Tillaberi, Wholesale, XOF/Kg	300.00	0.00	0.00	9.09	-14.29
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	230.00	4.55	-4.17	-16.36	-30.30
Nigeria	Sorghum (white)	National Average, NGN/KG	453.10	-18.59	-7.49	-39.80	

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

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

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

Seasonal Monitor and Cropping Conditions

According to Archive — GEOGLAM Crop Monitor, in West Africa, the planting and early growth stages of main season cereals are ongoing, including in both coastal and Sahelian countries. Second season rice planting is also underway in northern Nigeria. Overall, agro-climatic conditions are favourable, though some areas face challenges due to rainfall deficits and delayed onset of rains, particularly in parts of the Sahel and northern Togo. Rainfall data from March to early June show significant variation, with southern regions receiving up to 600 mm, while northern Sahel areas received less than 75 mm. Guinea-Bissau has seen improved conditions due to recent rains.

Conflict continues to disrupt agriculture in several countries, including Mali, Burkina Faso, Niger, Nigeria, Cameroon, and the Central African Republic. Inter-communal violence in north-western Nigeria adds to socio-economic pressures. Desert locusts remain present in parts of Niger, Chad, and Mauritania, with potential for swarm movement into the Sahel in the coming months. In Cape Verde, maize planting is expected to begin in July, with favourable rainfall forecasts. In Benin and Togo, the rainy season began on time, but localised deficits have affected some areas, especially in northern Togo's Savanes region, where a prolonged dry spell threatens early millet crops.

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

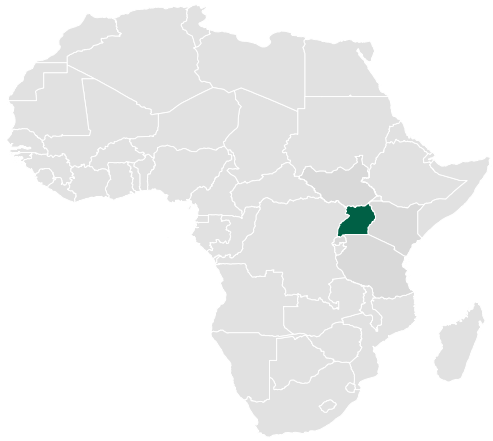
Food Trade Updates

East Africa

East African Community (EAC) has endorsed a groundbreaking Cross-border Payment System Masterplan, a bold five-year strategy designed to enhance the speed, affordability, and security of regional transactions.[35] Approved during the 28th Ordinary Meeting of the EAC Monetary Affairs Committee (MAC) in May 2025, the initiative aims to tackle one of the most persistent barriers to intra-regional trade: inefficient and expensive cross-border payment systems. The Masterplan is anchored on four strategic pillars: (i) Policy and regulatory harmonisation, (ii) Infrastructure development, (iii) Financial market deepening, (iv) Capacity building. Together, these focus areas target critical structural challenges that have long impeded the seamless flow of funds across EAC borders.

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, June 2025



Uganda

Starting next financial year, the Ugandan government, through the Uganda National Bureau of Standards (UNBS), will require all grain traded within or outside the country to carry a Quality Mark (Q-mark). This move aims to restore confidence in Uganda's grain exports following concerns from regional markets over substandard grain quality.

Southern Africa

Figure 20 below summarises some key activities and events recorded across Southern Africa that impact food trade activities.

Figure 20: Southern Africa Food Trade updates for June 2025

[35] https://www.thecitizen.co.tz/tanzania/news/national/how-eac-plans-to-cut-regional-transaction-costs-by-half-5069154

Mozambique

- Mozambique has officially dispatched its first shipment of goods under the African Continental Free Trade Area (AfCFTA), marking a significant step toward strengthening intra-African trade and deepening regional economic integration. The shipment, destined for Kenya, represents a major milestone in Mozambique's engagement with the AfCFTA framework and underscores its commitment to the continent's unified trade agenda. Mozambique became a signatory to the AfCFTA in 2018 and submitted its tariff offer in 2024, paving the way for this inaugural trade move under the agreement.

West Africa

Figure 21 provides an update on the issues and events reported in West African countries that impact the region's food trade and food security.

Figure 21: West Africa Cross Border Trade Updates June 2025

Nigeria

- Nigeria and Benin have signed a new bilateral agreement aimed at strengthening their partnership and advancing regional integration in West Africa. The agreement was formalized on June 21 during the inaugural West Africa Economic Summit (WAES 2025). It focuses on facilitating trade, enhancing infrastructure development, and promoting greater regional cohesion.
- Nigeria and the Republic of Rwanda have signed a bilateral agreement to eliminate double taxation and prevent tax evasion. Described as a vital instrument for fostering cross-border investment, the agreement aims to provide tax certainty and protect individuals and businesses from being taxed twice on the same income. The deal aligns with Nigeria's broader strategy to unlock private sector capital, boost intra-African trade, and position the country as a competitive investment destination under the African Continental Free Trade Area (AfCFTA).

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/

FOOD SECURITY MONITOR

EDITION 59 • June 2025

AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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