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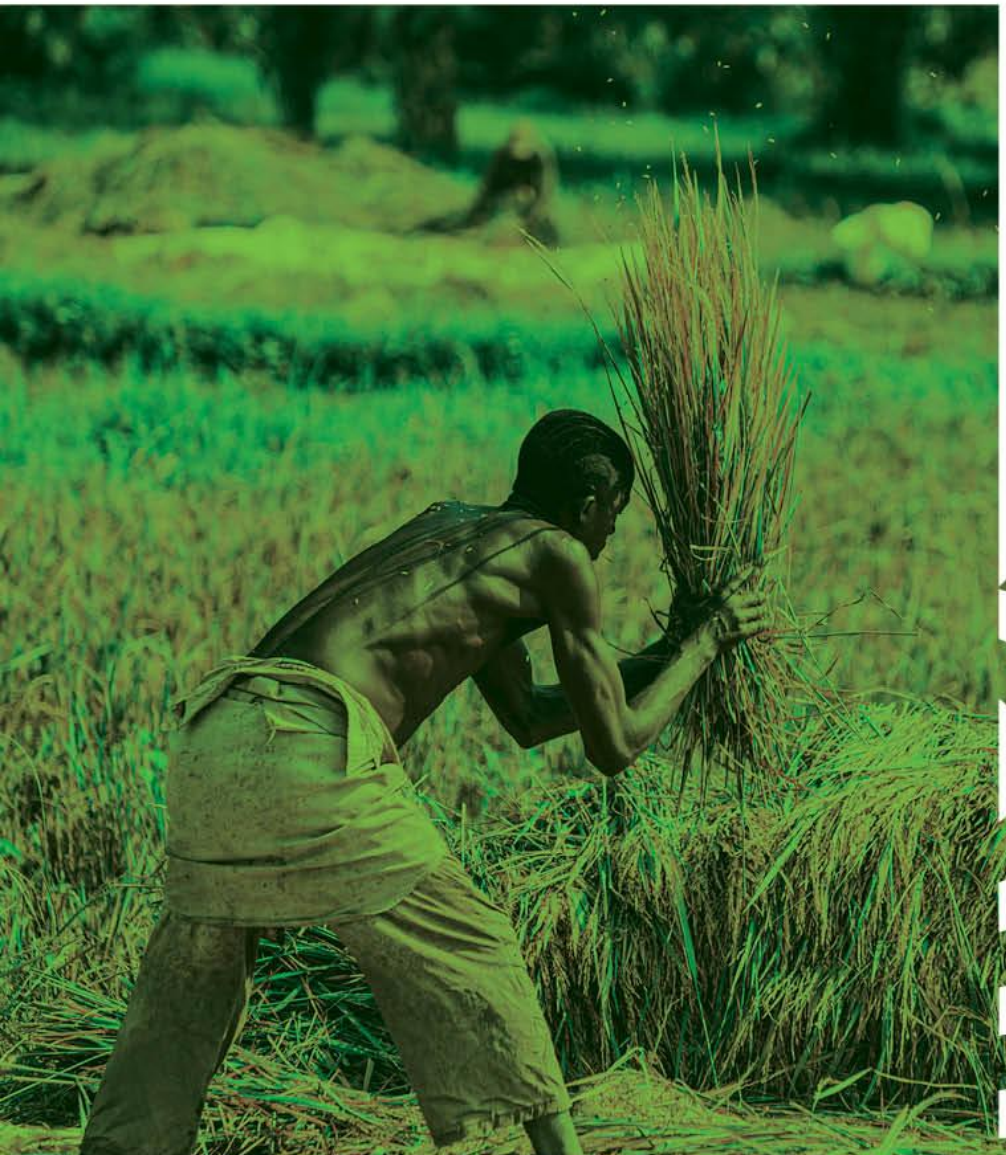
AFRICA FOOD TRADE AND RESILIENCE INITIATIVE



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 64th edition provides an overview of the food security situation and market prices across East, South, and West Africa.

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Summary

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

Food Commodity Prices Updates

Staple food and input markets across **East Africa** showed mixed month-on-month trends, shaped by seasonal supply, currency fluctuations, and import costs. Maize prices rose in Tanzania (US$285 → US$306, up 7.4%) due to tight stocks and strong regional demand, while Uganda fell (US$411 → US$381, down 7.3%) as new harvests boosted supply easing pressure on markets. Other maize markets saw smaller gains from moderate stock depletion. Rice recorded the steepest increase in Rwanda (US$1,104 → US$1,222, up 10.7%) on import delays and currency weakness, and Tanzania rose 5.8% on strong demand, while Kenya, Uganda, and South Sudan posted modest declines due to improved availability. Beans surged in Tanzania (up 8.3%) and Uganda (up 6.2%) on reduced supply and export demand, while Rwanda and Kenya saw minor gains reflecting steady supply conditions. Wheat prices eased slightly in Kenya and Ethiopia on stable global supply and lower import costs. Fertilizer markets were most volatile, with Rwanda's NPK spiking 19.95% on higher import costs, while Uganda saw dramatic decline: DAP plunged 51.95% and NPK fell 22.95% as new shipments entered the market. Kenya posted moderate declines across all fertilizer types, reflecting improved supply and easing global prices.

Southern Africa's staple food markets show mixed month-on-month trends as well, driven by seasonal supply dynamics, currency fluctuations, and import costs. Maize prices fell sharply in Malawi (US$729 → US$660, down 9.5%) due to improved supply, while Zambia rose moderately (US$276 → US$284, up 2.9%) on seasonal demand, and Mozambique remained stable with a slight uptick. Rice prices surged across the region, led by Malawi (US$2,190 → US$2,432, up 11%) on seasonal pressures and currency weakness, and Mozambique (US$934 → US$1,036, up 10.9%), while Zambia climbed 8.4% to US$3,033, reinforcing its premium market status. Beans showed contrasting movements, with Mozambique plunging 21% to US$1,017 on improved availability, while Malawi edged up 2.8% to US$3,608, maintaining the region's highest price. Fertilizer markets were relatively stable, with Malawi's NPK and Urea posting minor monthly gains (under 2%), though medium-term trends remain elevated, while Mozambique saw slight declines in NPK and moderate increases in Urea. Seasonal conditions are broadly favorable, supporting planting across most countries, though risks persist from low water levels at Kariba Dam affecting irrigation in Zambia and Zimbabwe, and conflict in northern Mozambique disrupting agricultural activities.

West Africa's staple food markets show broad price easing with isolated volatility driven by improved supply from harvests and seasonal inflows. Maize prices fell sharply in Togo (US$338 → US$304, down 10%) and Ghana (US$407 → US$374, down 8.1%), signaling regional normalization. Rice prices softened across most markets, led by Nigeria's steep drop (US$586 → US$508, down 13.3%), followed by Ghana (down 9.2%), Togo (down 7.7%), and Burkina Faso (down 7.5%), while Mali remained stable. Millet recorded the largest decline in Niger (US$407 → US$327, down 19.7%), with Burkina Faso also falling 8.1%, while Nigeria edged up 2.2% on localized demand. Sorghum prices decreased broadly, with Niger down 9.9% and Burkina Faso down 7.7%. Overall, these downward adjustments reflect improved availability and harvest inflows, though isolated volatility persists in some markets. Seasonal conditions remain favourable, supporting strong regional cereal output projected at 82.9 million tonnes (+10.4% above the five-year average), despite localized insecurity and socio-economic challenges.

Food Security Updates

Southern Africa faces widespread food insecurity through early 2026, with Crisis (IPC Phase 3) outcomes prevalent in Malawi, Mozambique, Zambia, and Zimbabwe. Malawi has the highest proportion of people facing Insufficient Food for Consumption (IFC) at 30.6% (6.8M), up 47.8% over two years with no recent change. Zimbabwe follows at 26.6% (4.5M), rising 5.8% year-on-year. Mozambique stands at 21.3% (7.6M), up 7.6% from last year but down 9.5% over two years, indicating long-term progress despite recent deterioration. Zambia is lowest at 15.1% (3.3M), with a 3.3% annual rise but a 17.5% two-year decline, showing relative resilience. Key drivers include depleted household food stocks from below-average harvests, high staple food prices, inflation, and limited income opportunities. In Malawi and Mozambique, conditions are further strained by lean season pressures, conflict-related displacement, and disease outbreaks, while Zambia struggles with lingering drought impacts, pest infestations, and localised flooding despite some recovery from 2024. Zimbabwe is entering the lean season with expanding Crisis outcomes in deficit-producing areas, although favourable rains and an improved harvest expected in April/May 2026 may help ease conditions.

Across the region, poor households are increasingly resorting to negative coping strategies, underscoring the urgent need for targeted assistance and resilience measures.

East Africa faces a mixed but largely concerning food security outlook through mid-2026. Ethiopia and Kenya are experiencing severe deterioration, with Emergency (IPC Phase 4) projected in parts of Ethiopia and widespread Crisis (IPC Phase 3) in pastoral and marginal agricultural zones of both countries due to drought, crop failures, and conflict. South Sudan remains the most critical hotspot, with Crisis and Emergency outcomes and some populations in Catastrophe (IPC Phase 5) amid flooding, insecurity, and economic collapse, sustaining a credible risk of famine. Uganda and Tanzania show relative stability but still have significant vulnerable populations—Uganda's Karamoja and refugee settlements face Crisis and Emergency, while Tanzania has localised Crisis despite overall improvements. Rwanda remains largely Minimal or Stressed, though drought-affected eastern areas risk sliding into Crisis during the lean season. Across the region, climate shocks, insecurity, high food prices, and displacement continue to drive acute food insecurity, leaving millions dependent on humanitarian assistance.

In general, food security situation has deteriorated compared to a year ago, with the total number of people facing IFC across five East African countries above their one-year levels. Uganda has the largest number affected—18 million people (35% of its population), up 18% year-on-year and 116.9% over two years. South Sudan shows the highest proportion at 40.2%, with increases of 4.9% and 48.5% over one and two years respectively. Rwanda stands at 29.3%, up 3.6% from last year, while Kenya has 23.6%, rising 23.6% year-on-year but slightly down over two years. Tanzania remains the least affected at 7.4%, though this reflects increases of 5.2% and 10.6% over one and two years.

West Africa faces persistent and severe food insecurity, primarily driven by conflict, displacement, and market disruptions. **Crisis (IPC Phase 3)** outcomes dominate in Burkina Faso, Mali, Niger, and northern Nigeria, with pockets of **Emergency (IPC Phase 4)** in Ménaka (Mali) and inaccessible LGAs of Borno State (Nigeria), where households have minimal food access and no humanitarian assistance. Niger faces the most severe crisis with 76.6% (21.4M) of its population facing IFC, up 21.4% compared to a year ago. Mali follows at 52.4% (13.2M), showing persistent vulnerability with no major change. Burkina Faso has 46.5% (11.2M), up 11.2% year-on-year. Nigeria has the largest absolute number, 56.4M (23.7%), with volatile trends, up +101% from last year but -37.5% over two years. Côte d'Ivoire has the lowest IFC at 15.6%, although up 5.1% year-on-year. Overall, Niger and Mali show the highest proportional vulnerability, while Nigeria dominates in absolute numbers. Insecurity, flooding, and fuel blockades are eroding livelihoods and purchasing power, while humanitarian response remains limited due to funding shortfalls and access constraints. Although some areas are benefiting from ongoing harvests and improved market supplies, high prices and reduced incomes continue to strain poor households. Southern Nigeria and select zones in Burkina Faso and Mali show **Stressed (IPC Phase 2)** conditions, but overall, the region faces escalating needs and heightened vulnerability through mid-2026.Food Trade Updates.

Food Trade Updates

- Kenya and Uganda join Malawi and Zambia in signing the second Mutual Recognition Agreement (MRA) in goods trade, the first of its kind on the continent. The MRA is key instrument for supporting a more predictable environment for regional food trade and provides some flexibility by reducing the time and costs of trading through the elimination of redundant or repeated testing and certification.
- The Government of Kenya has launched a new digital platform, eCustoms App designed to simplify trade, accelerate goods clearance and modernise Kenya's border operations. The system will allow KRA to process customs declarations faster, be paperless, and be more efficient for traders, transporters, and passengers.
- Vodacom Tanzania has launched M-Pesa Global Payment to facilitate cross-border transactions and enhance digital financial inclusion. In partnership with VISA, Alipay, Network International, Magnati, and MTN Uganda, customers can now make global Tap & Pay transactions using the M-Pesa Visa tokenised card; pay merchants in China via Alipay, enabled by Thunes, transact in Dubai through TerraPay-supported merchants, and pay merchants in Uganda directly into MTN MoMo wallets, powered by Thunes, all from the M-Pesa menu or the M-Pesa Super App.

Introduction

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

Food Security Dashboard

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

The number of people facing insufficient food consumption (IFC) has worsened across all monitored countries compared to last year, with the steepest increases recorded in Nigeria (+101.4%), Niger (+21.4%), and Uganda (+18%). Burkina Faso, Kenya, and Mali also registered notable rises, while smaller increases were observed in Rwanda, Togo, and Zimbabwe. On the price front, all monitored West African countries have experienced drastic drops in their commodity prices over the past six months and one year due to increased supplies from recent harvests. Over the past six months imported rice prices fell sharply in Burkina Faso (92.8%), Mali (62.9%), and Niger (84.2%), while maize prices declined significantly in Ghana (37.1%), Nigeria (44.2%), and Togo (98.2%). Zambia and Zimbabwe also saw declines in their maize prices over the past six months. On the other hand, Ethiopia, Malawi, Rwanda, and South Sudan have experienced price hikes over the past six months by 16.7%, 29.9%, 18.4%, and 8.7% respectively, signalling localised market pressures. Similarly, except Rwanda and Zambia, all monitored East and Southern African countries have experienced year-on-year price increases.

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	●	11.20	↑	-92.82	↓	-88.20	↓
Ethiopia					16.71	↑	13.99	↑
Ghana	0.00	●	8.40	↑	-37.13	↓	-32.69	↓
Kenya	0.00	●	13.60	↑	-9.43	↓	18.04	↑
Malawi	0.00	●	6.80	↑	29.85	↑	20.42	↑
Mali	0.00	●	13.20	↑	-62.94	↓	-77.43	↓
Mozambique	0.00	●	7.60	↑	93.52	↑		
Niger	0.00	●	21.40	↑	-84.18	↓	-165.19	↓
Nigeria	0.00	●	101.40	↑	-44.23	↓	-48.80	↓
Rwanda	0.00	●	3.60	↑	18.37	↑	-8.43	↓
South Sudan	0.00	●	4.90	↑	8.65	↑	76.16	↑
Tanzania	0.00	●	5.20	↑	-6.25	↓	7.14	↑
Togo	0.00	●	2.70	↑	-98.27	↓	-104.90	↓
Uganda	0.00	●	18.00	↑				
Zambia	0.00	●	3.30	↑	-28.19	↓	-25.62	↓
Zimbabwe	0.00	●	5.80	↑	0.00	↓	18.61	↑

Key: ● No Change ↑ Increase ↓ Decrease

Figure 1: Hunger Hotspots Snapshot, November 2025

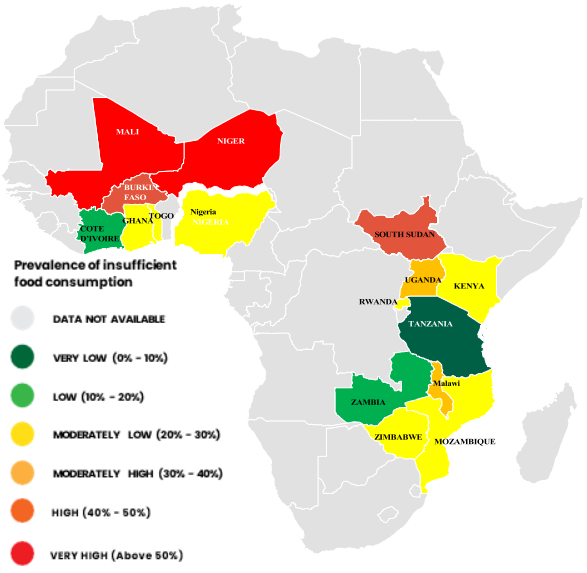


Figure 2 and Table 1b shows maize and rice prices across monitored countries for October and November 2025. Maize

[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).

prices remain highest in South Sudan at USD 915/MT, followed by Zimbabwe (USD 808/MT) and Malawi (USD 660/MT) in November, despite they have all experienced declines compared to October. The lowest maize prices were recorded in Nigeria (USD 260/MT), Mozambique (USD 284/MT), Ethiopia (USD 290/MT), and Tanzania (USD 285/MT). Similarly, rice prices were highest in Zambia (USD 3,033/MT), Malawi (USD 2,432/MT), and Zimbabwe (USD 2,250/MT) in November, reflecting increases of USD 240/MT) and USD 124/MT in Malawi and Zambia respectively. In November, Nigeria, Burkina Faso, and, and South Sudan recorded the lowest rice prices at USD 508/MT, USD 654/MT, and USD 663/MT respectively.

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

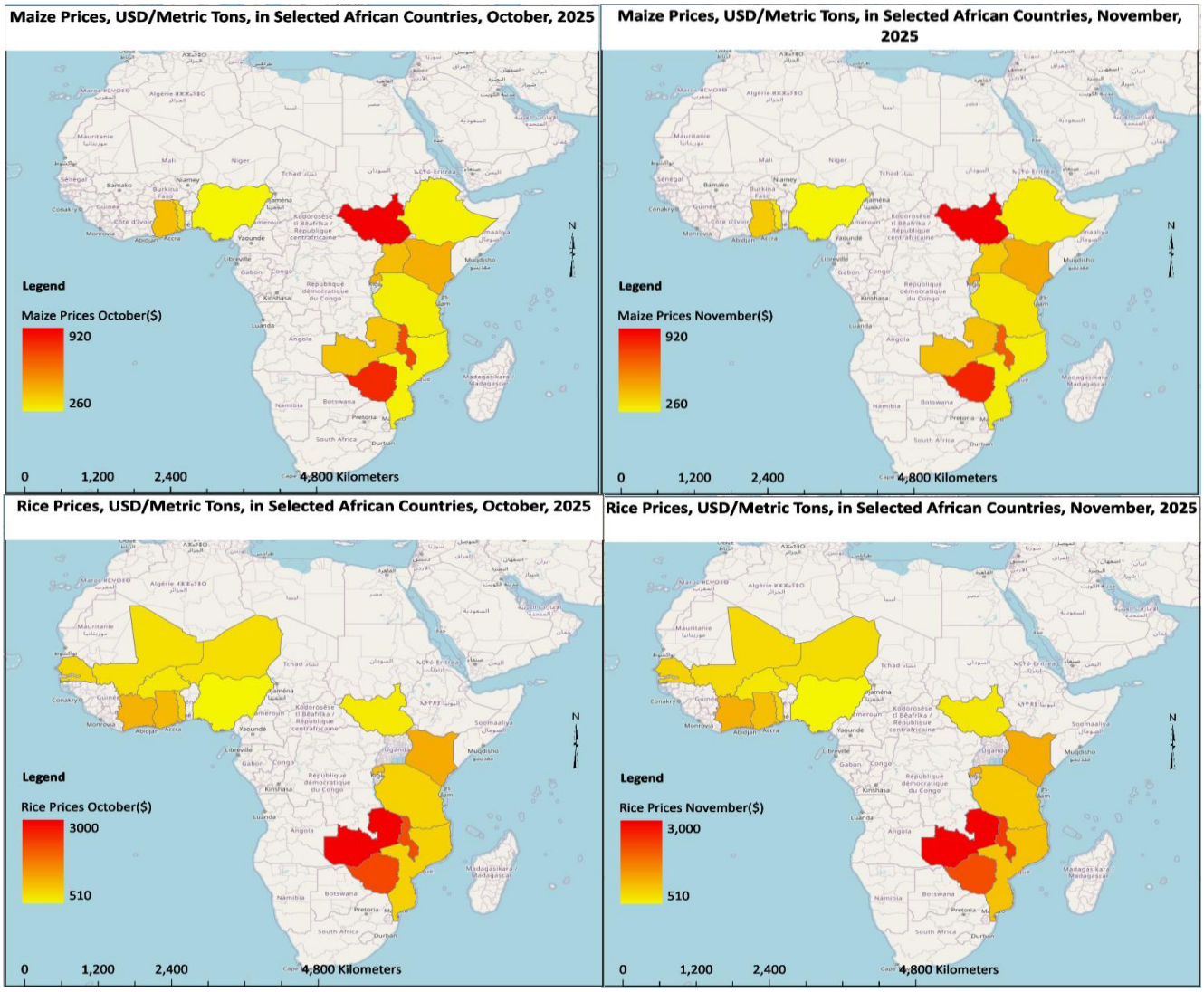


Table 1b: Average Maize and Rice Prices (USD/MT)

Price (US$/MT)

Maize	November	October	Price Change
Ethiopia	290	282	9
Kenya	460	451	10
Rwanda	450	440	10
Tanzania	306	285	21
Uganda	381	411	-29
South Sudan	915	923	-8
Malawi	660	729	-69
Zambia	400	398	1
Mozambique	284	276	8
Zimbabwe	808	808	0
Nigeria	260	263	-3
Togo (Lome)	304	338	-33
Ghana	374	407	-33

Rice	November	October	Price Cha
Kenya	1,271	1,288	-17
Rwanda	1,222	1,104	118
Tanzania	970	917	53
South Sudan	663	695	-32
Malawi	2,432	2,192	240
Mozambique	1,036	934	102
Zimbabwe (Epsworth)	2,250	2,250	0
Zambia	3,033	2,909	124
BF (Ouagadougou)	654	707	-53
Senegal (Dakar)	884	884	1
Mali (Bamako)	796	795	1
Niger (Niamey)	778	813	-35
Nigeria	508	586	-78
Togo (Centrale)	837	907	-70
Ghana	1,051	1,157	-106
Cote d'Ivoire (Abidjan)	1,220	1,220	1

Global Market Update

In November 2025, the FAO Food Price Index (FFPI) averaged 125.1 points, 1.2% lower than in October 2025, marking the third consecutive monthly decline. This was driven by falling prices of dairy products, meat, sugar and vegetable oils which outweighed an increase in the cereal index. As of 28 November, the International Grains Council (IGC) Grain and Oilseeds Index (GOI) stood at 223.38, reflecting a 1.62% increase over the past month and a modest 0.96% rise year-on-year, indicating overall price stability with slight upward momentum. Month-on-month, all monitored commodities posted gains: maize rose the most at 2.58%, followed by barley (2.47%), while wheat (1.02%), rice (1.52%), and soybeans (1.59%) recorded smaller increases. On an annual basis, trends were mixed. Rice prices fell sharply by 27.3%, signalling significant market weakness, while soybeans (+8.48%) and barley (+8.08%) posted strong gains, and maize (+2.97%) showed moderate growth. Conversely, wheat declined by 1.79% year-on-year, underscoring uneven performance across grain markets.

Figure 3: FAO Food Price Index (FFPI)2

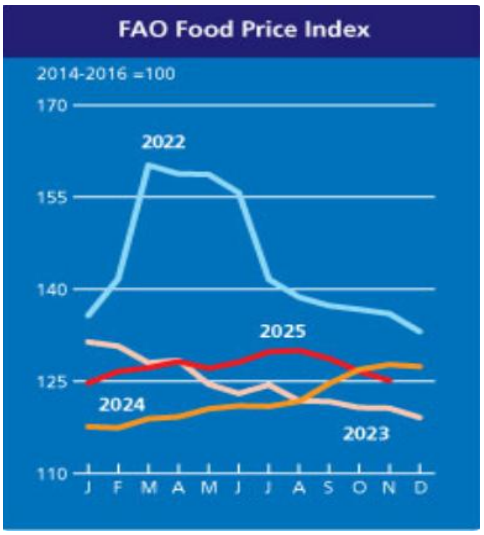


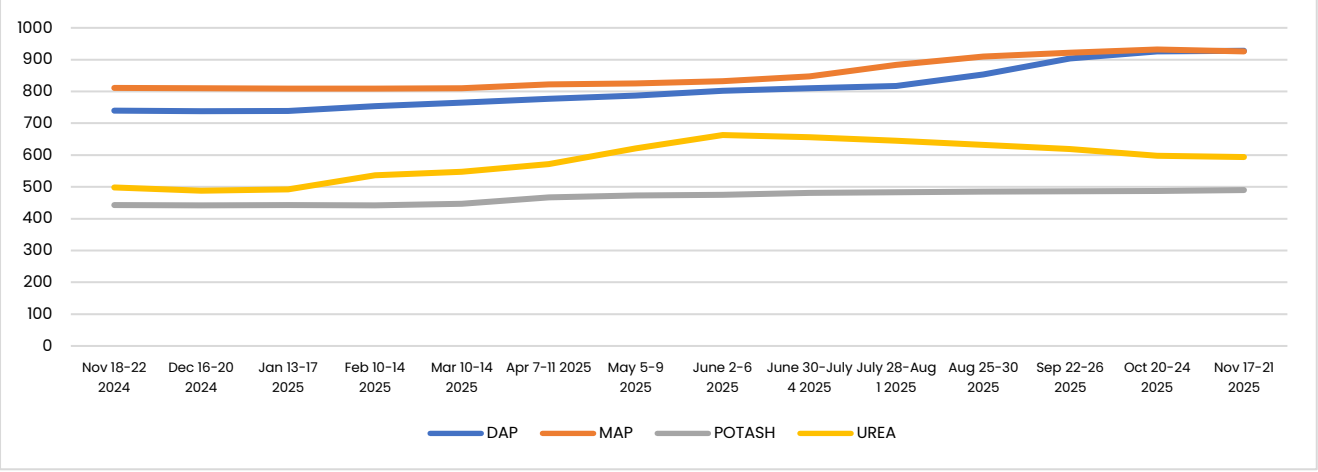
Table 2: IGC GOI Commodity Price Indices3

Jan 2000 = 100	28-Nov	% Change 1M	% Change 1Y
GOI	223.38	*1.62*	*0.96*
Wheat	195.54	*1.02*	*-1.79*
Maize	227.85	*2.58*	*2.97*
Rice	154.27	*1.52*	*-27.30*
Soyabeans	228.24	*1.59*	*8.48*
Barley	232.16	*2.47*	*8.08*

Global Fertiliser Prices

In November 2025, fertiliser prices remained largely stable compared with the previous month, with DAP increasing slightly by 0.2%, and potash rising by0.6%, while MAP declined marginally by 0.6% and urea fell by 0.7%. However, year-on-year changes reveal a strong upward trend across all products: DAP surged by 25.4%, urea by 19.3%, MAP by 14.2%, and potash by 10.6%. This indicates that while short-term fluctuations are minimal, long-term fertiliser costs have risen significantly, particularly for DAP and Urea, which could increase production costs for farmers and impact food prices.

Figure 4: Dry Fertiliser Prices ($/MT)



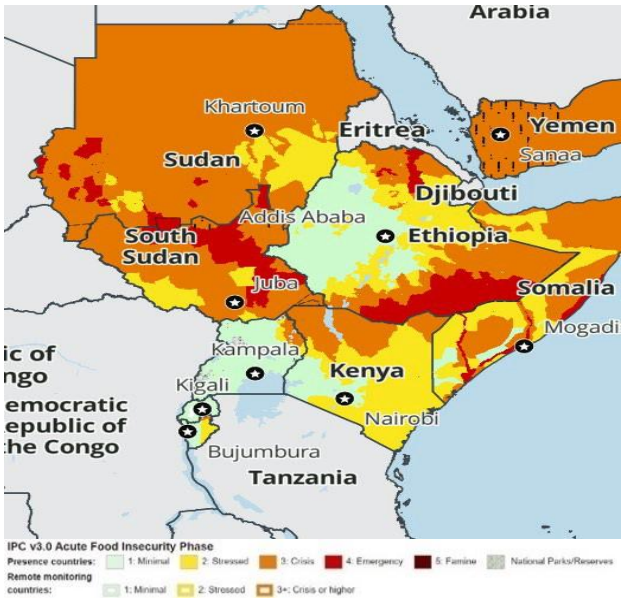
***Source**: Author's construction based on DTN [4]*

[2] https://www.fao.org/worldfoodsituation/foodpricesindex/en/
[3] https://www.igc.int/en/markets/marketinfo-goi.aspx
[4] https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/10/29/anhydrous-8-price-spike-one-month

East Africa Food Insecurity Updates

Food Security Outlook

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



Food security in **Ethiopia** is deteriorating sharply due to severe crop losses, drought, and conflict. Emergency (IPC Phase 4) conditions are projected in East Hararghe by early 2026 after a 54% Meher crop failure, with rising severe acute malnutrition and mortality. Widespread Crisis (IPC Phase 3) outcomes persist in southern and south-eastern pastoral zones, where near-record low rainfall, extreme heat, and water scarcity continue to erode livestock health and incomes.[5] In Tigray and Amhara, despite ongoing harvests, low yields and early stock depletion will drive food gaps by the lean season, compounded by surging malnutrition admissions. Overall, localised emergencies and widespread crises reflect compounding shocks, climate extremes, production deficits, and insecurity - *conditions that are expected to place millions at risk of acute food insecurity through mid-2026.*

Kenya is facing worsening food security due to one of the driest short rains seasons on record, with rainfall at only 30–60% of average and temperatures 1–2°C above normal, accelerating evaporation and rangeland depletion.[6] Pastoral counties such as Turkana, Marsabit, Wajir, Mandera, Garissa, and Tana River are projected to be in Crisis (IPC Phase 3) by early 2026, as poor forage and water availability continue to suppress livestock health, milk production, and incomes, forcing atypical migrations and raising conflict risks. Marginal agricultural areas remain Stressed (IPC Phase 2), but consecutive poor harvests, high food prices, and limited labour opportunities are expected to push many households into Crisis between February and May. Coping strategies such as asset sales and charcoal production fail to close widening food and income gaps.

Rwanda is expected to maintain relatively stable food security conditions from November 2025 onwards, with most areas classified in Minimal (IPC Phase 1) or Stressed (IPC Phase 2).[7] However, localised pockets of vulnerability persist, particularly in drought-affected eastern regions and among poor households reliant on rain-fed agriculture. Below-average rainfall during the September–December season, combined with rising food prices is likely to constrain household food access, while limited income opportunities and high dependency on markets could push some households into Crisis (IPC Phase 3) during the lean season in early 2026. Overall, while widespread emergency outcomes are not anticipated, continued monitoring is essential as climatic variability and economic pressures remain key risk factors.

South Sudan South Sudan faces severe and escalating food insecurity, with widespread Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes expected to persist through early 2026 due to conflict, flooding, economic collapse, and high levels of displacement.[8] Hard-to-reach areas in Upper Nile and Jonglei, such as Nasir and Fangak, already have populations in Catastrophe (IPC Phase 5), where acute malnutrition and mortality are rising amid cholera outbreaks and restricted humanitarian access. Violence, cattle raids, and territorial disputes continue to disrupt livelihoods and impede aid delivery, while prolonged flooding restricts movement and trade. A deteriorating macroeconomic environment marked by currency depreciation of up to 50%, high inflation, and oil revenue disruptions further erodes household purchasing power. Although humanitarian assistance is ongoing, access constraints and escalating insecurity sustain a credible risk of Famine (IPC Phase 5) in Nasir if aid is obstructed and isolation persists through May 2026.

From November 2025 onwards, **Tanzania's** food security outlook is expected to remain relatively stable but with localised vulnerabilities. Following improvements in mid-2025 due to good seasonal rains and harvests, the number of people in Crisis (IPC Phase 3) is projected to decline to about 242,000 (5% of the analysed population), while nearly

[5] https://fews.net/east-africa/ethiopia
[6] https://fews.net/east-africa/kenya
[7] https://www.ipcinfo.org/ch/
[8] https://fews.net/east-africa/south-sudan

1 million people will remain Stressed (IPC Phase 2).[9] Most areas are anticipated to benefit from normal-to-above-normal rainfall, supporting crop and livestock production and improving household food access. However, low-income households reliant on agricultural labour and pastoral livelihoods will continue to face challenges from previous dry spells, high food prices, and limited income opportunities, leaving them vulnerable during the lean season.

Uganda's food security situation shows some improvement but remains concerning in key areas. An estimated 1.42 million people are projected to face Crisis (IPC Phase 3) or worse until February 2026, down from 2.46 million earlier in the year, largely due to expected strong harvests.[10] However, severe food insecurity persists in Karamoja, where up to 45% of the population in districts like Kotido, Kaabong, Napak, and Moroto remain in IPC Phase 3 or above. Refugee settlements also face significant challenges, with around 712,000 refugees, including 16,000 in Emergency (IPC Phase 4) expected to experience acute food insecurity during the same period. Key drivers include poor rainfall in some areas, high food prices, limited income opportunities, and the strain of hosting 1.9 million refugees, Africa's largest refugee population. Acute malnutrition remains a concern, with over 428,000 children and 84,000 pregnant or breastfeeding women requiring urgent nutrition support.

Prevalence of Insufficient Food Consumption

In November, the total number of people facing Insufficient Food Consumption (IFC) across five East African countries remained unchanged from October at 45.3 million. However, disparities across countries are stark. Uganda recorded the highest number of affected individuals at 18 million, representing 35% of its population, a moderate 18% increase compared with last year and a significant 116.9% over two years. South Sudan, despite its smaller population, has the highest proportion affected at 40.2%, reflecting chronic vulnerability and an increase of 4.9% year-on-year and 48.5% over two years. Rwanda also shows deteriorating conditions, with 29.3% of its population affected, up 3.6% from last year and 2.9% over two years. Kenya has 23.6% of its population facing IFC, up by 23.6% compared to last year but down by 4.2% compared with two years ago. Tanzania remains relatively stable with the lowest proportion at 7.4%, though this represents increases of 5.2% and 10.6% compared with last year and two years ago respectively. These trends highlight worsening food insecurity in Uganda and South Sudan, moderate deterioration in Rwanda and Kenya, and relative stability in Tanzania.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (November 2025)[11]

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	23.64	0.00	13.60	-4.23
Rwanda	12.30	3.60	3.60	29.27	0.00	3.60	2.86
South Sudan	11.00	4.90	4.90	40.20	0.00	4.90	48.48
Tanzania	56.30	5.20	5.20	7.37	0.00	5.20	10.64
Uganda	42.70	18.00	18.00	35.03	0.00	18.00	116.87

**Current month and **Previous month*

Commodity Prices

Key drivers of commodity prices in EA

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

[9] https://www.ipcinfo.org/ch/
[10] https://www.ipcinfo.org/ch/
[11] Author's construction based on WFP HungerMap Live

Maize

Figure 6: National average price spreads for maize across select East African Countries[12]

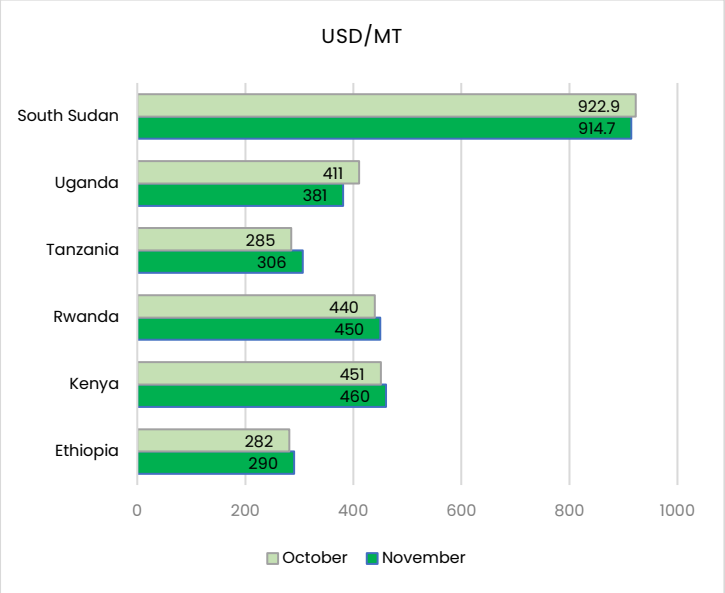


Figure 6 presents maize prices (in USD per metric tonne) across six Eastern African countries, highlighting notable month-on-month changes between October and November. **South Sudan** continued to record the highest prices market, despite a slight decline to USD 914.7/MT (-0.9%). **Uganda** recorded the most significant drop (-7.3%) to USD 381/MT, while **Tanzania** saw the sharpest increase, rising by 7.4% to USD 306/MT signaling a decline in local supply. Other markets—**Kenya, Rwanda,** and **Ethiopia**—recorded modest gains of 2–3%, reflecting localised supply and demand adjustments rather than a region-wide shock. Converted into retail terms, these prices translate to approximately USD 82 per 90-kg bag in South Sudan, compared with USD 26–28 per 90kg bag in Ethiopia and Tanzania, highlighting stark cost disparities.

Table 4 summarises maize prices in local currencies across East African countries, broadly reflecting the trends observed in USD-denominated prices. Most markets recorded month-on-month increases, apart from **South Sudan**, where prices remained largely stable, declining marginally by 0.21%. Despite this short-term stability, South Sudan's prices are down 23.76% compared with three months ago yet remain 8.65% higher over six months and an extraordinary 76.16% year-on-year. These figures highlight persistent structural challenges—logistics, security risks, and currency depreciation—that continue to make South Sudan the most expensive maize market in the region.

In **Kenya**, average retail maize prices stood at KES 59.28/kg, rising 2.44% in the past month but falling 5.22% over three months and 9.43% over six months, indicating some recent relief after mid-year highs. However, year-on-year prices are up 18.04%, pointing to sustained inflationary pressure. **Rwanda** recorded the strongest monthly increase, with prices averaging RWF 636.24/kg, up 10.55% month-on-month and maintaining gains of 11.03% over three months and 18.37% over six months. Yet, prices are 8.43% lower year-on-year, suggesting last year's high base. The current upward trend likely reflects tightening supply amid growing regional demand.

In **Ethiopia**, white maize prices averaged ETB 4,437.50 per 100 kg, increasing 3.14% month-on-month but declining slightly over three months (-0.21%). Over six months, prices surged by 16.71%, and year-on-year they remain 13.99% higher, signaling persistent inflationary pressure despite short-term stability. **Tanzania**'s wholesale maize prices averaged TZS 75,000 per 100 kg, rising 7.14% month-on-month and 3.45% over three months, but down 6.25% over six months. Year-on-year, prices are up 7.14%, indicating moderate inflation. The recent uptick suggests seasonal tightening, but Tanzania's relatively lower price base positions it as a key supply source for neighbouring high-price markets.

Uganda recorded a modest 1.59% month-on-month increase, though prices remain 3% lower compared with three months ago, reflecting emerging supply constraints as the lean season begins. Overall, these trends highlight mixed short-term dynamics, persistent inflationary pressures in several markets, and structural challenges in South Sudan, reinforcing the need for regional trade facilitation and aggregation strategies to stabilise supply and improve affordability.

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

Table 4: Percentage changes in maize prices in East Africa[13]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	4,437.50	3.14	-0.21	16.71	13.99
Kenya	Maize	National Average, Retail, KES/KG	59.28	2.44	-5.22	-9.43	18.04
Rwanda	Maize	National Average, Retail, RWF/Kg	636.24	10.55	11.03	18.37	-8.43
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	4,181.21	-0.21	-23.76	8.65	76.16
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	75,000.00	7.14	3.45	-6.25	7.14
Uganda	Maize	National Average, Retail, UGX/Kg	1,371.70	1.59	-3.08		

Note: Last price is for October 2025, * September 2025, and ** August 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[14]

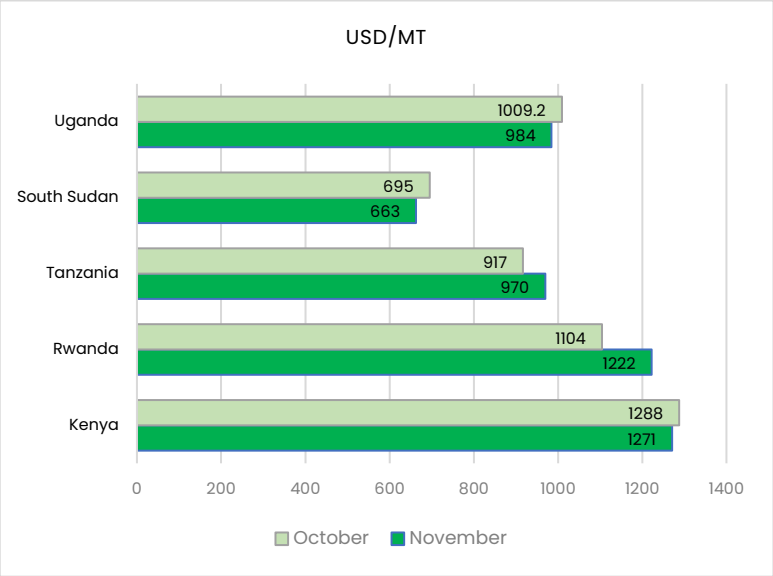


Figure 7 illustrates mixed month-on-month rice price trends (in USD) across five Eastern African countries with notable cross-country divergence. **Kenya** remains the highest-priced market, easing slightly to USD 1,271/Mt (-1.3%), while **Rwanda** recorded the sharpest increase, rising by 10.7% month-on-month to USD 1,222/MT signaling tightening supply and stronger demand. **Tanzania** prices also advanced to USD 970/MT (+5.8%), reinforcing its role as a competitive origin that is nonetheless experiencing seasonal firming. In contrast, **Uganda** declined by 2.5% to USD 984/MT and **South Sudan**, the lowest-priced in the region fell to USD 663/MT (-4.6%).

Table 5 summarises rice prices in local currencies across East African countries, broadly reflecting mixed short-term movements and persistent inflationary trends over longer horizons. Most markets recorded month-on-month increases, except Kenya (-1.04%), South Sudan (-4.01%), and Uganda's premium rice segment (-4.79%), which experienced declines. South Sudan's short-term easing contrasts with a sharp year-on-year surge of 45.26%, alongside rises in Rwanda (+36.46%) and Tanzania (+25.00%), highlighting structural challenges such as logistics, security risks, and currency volatility that keep these markets elevated.

In **Kenya**, retail rice prices averaged KES 163.59/kg, down 1.04% month-on-month but slightly higher over three months (+0.72%) and six months (+8.96%). Year-on-year prices rose 3.62%, reflecting mild but persistent inflationary pressure despite recent relief. **Rwanda** recorded steady gains, with prices averaging RWF 1,597.33/kg, up 1.08% month-on-month and maintaining increases of 6.83% over three months and 6.49% over six months. Year-on-year, prices remain significantly high at 36.46%, reflecting sustained supply constraints and strong demand. In **South Sudan**, retail rice prices averaged SSP 3,029.54/kg, falling 4.01% month-on-month but still up 5.19% and 5.80% over three and six months respectively. The year-on-year increase of 45.26% highlights chronic structural issues that keep South Sudan among the most expensive rice markets in the region. **Tanzania's** wholesale rice prices averaged TZS 2,375/kg, rising 5.56% month-on-month and 9.20% over three months, with a moderate 2.15% increase over six months. Year-on-year prices are up 25%, confirming supply and demand constraints despite the country's relatively competitive base.

Finally, **Uganda** shows grade-specific dynamics. Rice (kaiso) averaged UGX 3,541.27/kg, up 1.57% month-on-month and 3.53% over three months, while Rice (super) fell sharply by 4.79% month-on-month and 5.33% over three months, suggesting supply improvements or consumer down-trading in premium segments. Overall, these trends reveal mixed short-term movements, strong inflationary pressures in Rwanda, South Sudan, and Tanzania, and structural challenges that reinforce the need for regional trade facilitation and adaptive sourcing strategies.

[13] Author's construction based on 1) AGRA MIS data for Rwanda and Uganda; 2) FAO data for South Sudan, 3) National MIS Ethiopia, Kenya & Tanzania

[14] 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[15]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	163.59	-1.04	0.72	8.96	3.62
Rwanda	Rice	National Average, Retail, RWF/Kg	1,597.33	1.08	6.83	6.49	36.46
South Sudan	Rice	National Average, Retail, SSP/Kg	3,029.54	-4.01	5.19	5.80	45.26
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	237,500.00	5.56	9.20	2.15	25.00
Uganda	Rice_kaiso	National Average, Retail, UGX/Kg	3,541.27	1.57	3.53		
Uganda	Rice_super	National Average, Retail, UGX/Kg	4,586.23	-4.79	-5.33		

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

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

Beans

Figure 8: National average price spreads for beans across select East African Countries[16]

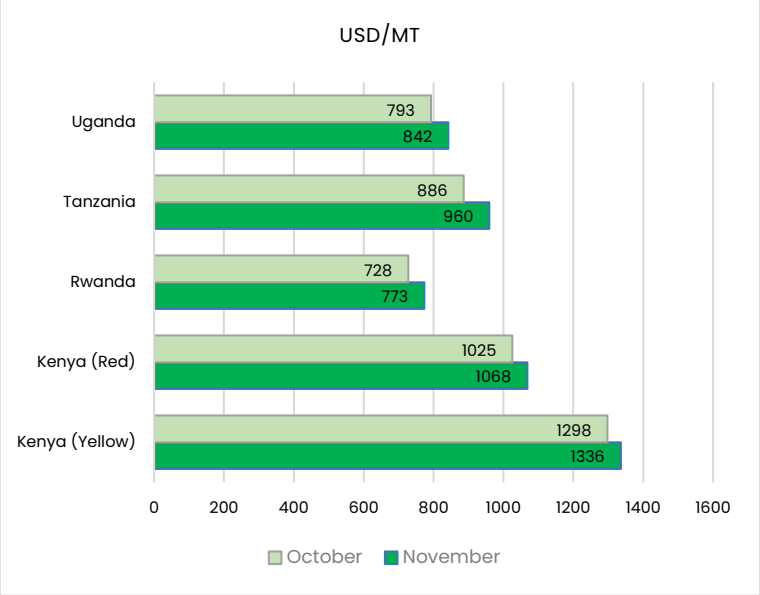


Figure 8 shows beans price trends in USD/MT across five Eastern Africa countries, with prices exhibiting upward movements. **Uganda** recorded a notable 6.3% month-on-month increase to USD 842/MT, signaling firming regional and domestic demand. **Tanzania** posted a strong 8.3% uptick to USD 960/MT, reinforcing its role as a competitive origin experiencing upward pressure. **Rwanda's** bean prices also advanced moderately (6.2%), rising to USD 773/Mt, reflecting steady demand and possible supply constraints. In **Kenya**, both bean varieties saw gains: red beans increased by 4.2% to USD 1,068/Mt, while yellow beans rose to USD 1,336/MT, 3% month-on-month increase, maintaining Kenya as the highest-priced market for beans in the region. Collectively, these trends indicate broad-based price firming across the region, with Kenya continuing to lead in price levels and Tanzania showing the sharpest month-on-month increase, underscoring the need for adaptive sourcing strategies and regional trade facilitation to manage tightening supply conditions.

Table 6 illustrate beans prices in local currencies across five markets, showing broad-based month-on-month firming with varying medium and long-term trends. **Kenya** recorded price increases across both retail bean varieties. Yellow Green rose to KES 172.04/kg, reflecting a 3.28% month-on-month (MoM) gain and 6.52% growth over three months, though still 9.27% lower than six months ago and 6.92% below last year's level. Meanwhile, Red Haricot (Wairimu) rose to KES 137.51/kg (+4.49% MoM; +7.68% over three months), remaining 1.00% lower over six months but slightly higher year-on-year (+0.90%), signaling mild annual inflation in the premium grade despite mid-year price relief.

Rwanda's retail bean prices strengthened to RWF 1,118.34/kg, marking an uptick of 6.26% month-on-month, 9.66% over three months, and 4.39% over six months, though still 5.44% lower year-on-year (YoY), reflecting recent market tightness against last year's high base. Tanzania's wholesale prices climbed to TZS 2,350/kg (+8.05% MoM; +2.17% over three months) but remain down by 12.96% compared with six months ago and 10.75% YoY, signalling short-term price uptick due to depleting stocks. Uganda posted a sharp rise to UGX 3,030.30/kg (+10.68% MoM), though still 5.17% lower over three months (six-month and YoY data not reported), indicating short-term tightening amid volatility. Overall, the data suggest near-term firmness across all markets, with mixed medium-term trajectories and generally softer YoY outcomes outside Kenya's Red Haricot.

[15] Author's construction based on 1) AGRA MIS data for Rwanda and Uganda; 2) FAO data for South Sudan, 3) National MIS Ethiopia, Kenya & Tanzania

[16] 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[17]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	172.04	3.28 ▲	6.52 ↑	-9.27 ↓	-6.92 ↓
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	137.51	4.49 ▲	7.68 ↑	-1.00 ↘	0.90 ▲
Rwanda	Beans	National Average, Retail, RWF/Kg	1,118.34	6.26 ↑	9.66 ↑	4.39 ▲	-5.44 ↓
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	235,000.00	8.05 ↑	2.17 ▲	-12.96 ↓	-10.75 ↓
Uganda	Beans	National Average, Retail, UGX/Kg	3,030.30	10.68 ↑	-5.17 ↓		

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

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

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

Wheat

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

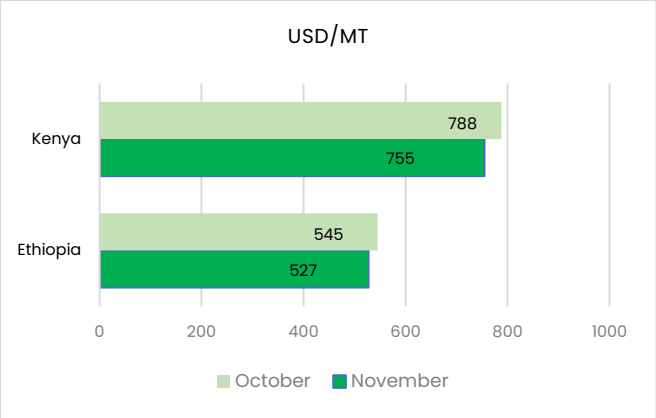


Figure 9 presents wheat price trends (in USD) for Ethiopia and Kenya showing a month-on-month decline, indicating short-term easing across the two markets. In **Kenya**, prices fell to USD 755/MT (-4.2%), suggesting improved supply conditions. Similarly, **Ethiopia** prices dropped by 3.3% to USD527/Mt, reflecting similar dynamics of short-term relief. Overall, the downward trend in both countries points to seasonal supply improvements though Kenya's price level remains significantly above Ethiopia's, maintaining its position as the costlier wheat market in the region.

Table 7 highlights short-term easing in both markets. **Ethiopia**'s national retail wheat price stood at ETB 8,060 per 100 kg, falling 3.22% month-on-month, yet showing marginal strengthening over three months (+0.24%) and a notable upsurge over six months (+10.86%) and year-on-year (+9.39%), reflecting temporary relief amid medium-to-long-term cost pressures. **Kenya**'s national retail price averaged KES 97.19/kg declining -3.94% month-on-month and remaining lower over three months (-5.97%) and six months (-6.55%), suggesting sustained mid-year softening. However, the year-on-year increase (+1.69%) points to mild underlying inflation.

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,060.00	-3.22 ↘	0.24 ▲	10.86 ↑	9.39 ↑
Kenya	Wheat	National Average, Retail, KES/KG	97.19	-3.94 ↘	-5.97 ↓	-6.55 ↓	1.69 ▲

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

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

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

Fertiliser

Table 8 reveals divergent short-term dynamics in fertiliser markets across Kenya, Rwanda, and Uganda. **Kenya** shows broad near-term easing, with retail prices for CAN (KES 68.70/kg), DAP (KES 112.53/kg), and NPK (KES 93.67/kg) declining month-on-month by 10.96%, 7.30%, and 11.93%, respectively. Medium term signals are mixed, while year-on-year trends indicate partial correction of earlier spikes. CAN remains lower (-13.39%), whereas DAP (+8.11%) and NPK (+8.64%) are still above last year's levels. In contrast, **Rwanda** faces persistent upward pressure, with NPK at USD 956.37 per 50 kg (+19.95% MoM; +34.88% YoY) and urea at USD 808.13 (+2.13% MoM; +40.00% YoY), reflecting tightness in imported nutrient markets. **Uganda** recorded sharp short-term corrections, with DAP falling 51.95% MoM and NPK down 22.95%, though three-month trends remain mixed. Overall, the region exhibits strong cost pressure in Rwanda, broad relief in Kenya, and abrupt resets in Uganda. This trend profile calling for adaptive procurement strategies, close monitoring

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

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

of import costs and policy shifts, and targeted distribution to cushion farmers against volatility.

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	68.70	-10.96 ↓	-6.08 ↓	-5.46 ↓	-13.39 ↓
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	112.53	-7.30 ↓	1.63 ▲	-1.92 ↘	8.11 ↑
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	93.67	-11.93 ↓	-2.43 ↘	-10.51 ↓	8.64 ↑
Rwanda	NPK	National Average USD/50kg	956.37	19.95 ⊗	28.10 ⊗	27.96 ⊗	34.88 ⊗
Rwanda	Urea	National Average USD/50kg	808.13	2.13 ▲	8.14 ↑	8.97 ↑	40.00 ⊗
Uganda	DAP	National Average, Retail, UGX/Kg	3,549.56	-51.95 ↓	-3.73 ↘		
Uganda	NPK	National Average, Retail, UGX/Kg	3,922.90	-22.95 ↓	8.32 ↑		

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

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

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

Seasonal Monitor and Cropping Conditions[20]

In East Africa, harvesting of main-season cereals has been completed in most countries, while **Ethiopia** continues with the Meher season harvest. Planting and crop development for second-season cereals are underway across the region; however, concerns persist due to a delayed and dry start to the season, which may affect growth and yield potential.

In **Kenya,** harvesting of long-rains cereals is nearing completion under generally favourable conditions. Rice crops are progressing well in the central and western regions, also under favourable conditions. Meanwhile, planting of short-rains maize has just begun, with concerns emerging in bimodal areas of the eastern half of the country due to a delayed and drier-than-normal start to the season, a trend forecast to persist through December. In **Uganda**, first-season cereal harvesting is nearly complete in the unimodal north under favourable conditions, while concerns remain for second-season maize crops due to a drier-than-normal start, particularly in the northwest where poor outcomes are anticipated.

In **Burundi**, La Niña-induced delays and below-average rainfall since September have hindered crop development. Season A crops, which account for roughly 35% of annual cereal production, are currently in the vegetative to reproductive stages, with harvest outcomes projected to be below average. Similarly in **Rwanda**, the poor onset of short rains from September to November adversely affected the establishment and early development of Season A crops.

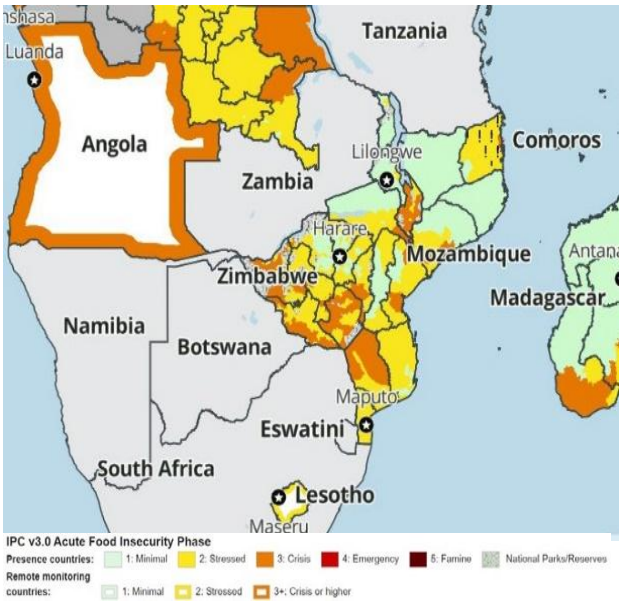
In **Tanzania**, *Vuli* season crops are in the vegetative to reproductive stages across the country, while planting of *Msimu* season cereals has just begun in unimodal areas of the central and southern regions. However, concerns persist in most areas due to a delayed and drier-than-normal start to the season, except in the southeast where rainfall has been adequate to support crop development.

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

[20] Crop Monitor No. 110 – November 2025: EarlyWarning_CropMonitor_202511.pdf

Southern Africa Food Security Update

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



Malawi is expected to face Crisis (IPC Phase 3) food security outcomes through March 2026 in southern districts such as Neno, Mwanza, Phalombe, Blantyre, Mulanje, Thyolo, Nsanje, and Chikwawa, as well as parts of the central region.[21] These conditions are driven by depleted household food stocks following below-average 2025 harvests, combined with high staple food prices and limited agricultural labour opportunities that restrict market access for poor households. Although maize prices declined slightly in October following government import announcements and trader stock reductions, they remain 53% above last year and 176% above the five-year average, continuing to constrain purchasing power. Inflation remains high at 29.1%, with food inflation at 32.4%, further eroding household access to food. In contrast, most northern and some central districts maintain Stressed (IPC Phase 2) or Minimal (IPC Phase 1) outcomes, supported by own-produced stocks and typical income sources.

In **Mozambique**, food insecurity is expected to remain severe through May 2026, with Crisis (IPC Phase 3) outcomes persisting in conflict-affected northern provinces like Cabo Delgado and Nampula due to escalating violence, displacement, depleted food stocks, and rising staple prices. Cholera outbreaks and the onset of the lean season are compounding vulnerabilities in these areas. Although humanitarian assistance in Cabo Delgado is helping to mitigate conditions to Stressed (IPC Phase 2), access remains limited. In southern and central semi-arid regions, Crisis outcomes are expected to continue until at least March 2026, driven by consecutive poor harvests, high food prices, and limited income opportunities. Households are increasingly relying on negative coping strategies, including reducing meal frequency, consuming wild foods, and selling non-productive assets, as income from agricultural labour and charcoal sales fails to offset the gap. Households are increasingly relying on negative coping strategies, including reducing meal frequency, consuming wild foods, and selling non-productive assets, as income from agricultural labour and charcoal sales fails to close the gap.

Zambia's food security situation shows improvement compared to 2024 but remains concerning in many areas. Around 1.7 million people (17% of the analysed population) are projected to face Crisis (IPC Phase 3) or worse between October 2025 and March 2026, including nearly 9,900 people in Emergency (IPC Phase 4), mainly in Western Province districts such as Mitete, Shang'ombo, and Sikongo. This represents an increase from 1.2 million in mid-2025 but remains significantly lower than the 4.9 million affected in 2024, reflecting recovery from last year's severe drought. Key drivers include prolonged dry spells, pest infestations (Fall Armyworm), localised flash floods, and high food and input prices, which continue to strain rural livelihoods and force negative coping strategies. Despite improved rainfall prospects, urgent assistance is required in 43 hotspot districts to address food gaps, protect livelihoods, and prevent acute malnutrition.

Zimbabwe is experiencing emerging Crisis (IPC Phase 3) outcomes in typical deficit-producing areas such as Matabeleland North and South, Masvingo, Midlands, Manicaland, and parts of Mashonaland as the lean season begins. These conditions are driven by depleted household food stocks, below-average incomes, and rising food prices. Surplus-producing areas in Mashonaland have shifted from Minimal (IPC Phase 1) to Stressed (IPC Phase 2) as poor households' stocks run low, although some continue to meet minimum food needs through limited casual labour. By early 2026, Crisis conditions are expected to expand as more households' exhaust their stocks and face constrained market access. However, forecasted favourable rains and above-average cropped areas point to an improved harvest in April/May 2026, likely easing food insecurity and returning most areas to Minimal or Stressed outcomes.

[21] https://fews.net/southern-africa/malawi

Prevalence of Insufficient Food Consumption

In November, Malawi recorded the highest proportion of people facing Insufficient Food Consumption (IFC) among the four Southern African countries, with 30.6% of its population (6.8 million people) affected (**Table 9)**. This represents a 47.8% increase compared to two years ago, signalling worsening food insecurity despite no month-to-month change. Zimbabwe follows with 26.6% of its population (4.5 million) affected, up 5.8% year-on-year, though slightly improved compared with two years ago (-11.8%). Mozambique has 21.3% of its population (7.6 million) facing IFC, reflecting a 7.6% increase from last year but a 9.5% decline over two years, suggesting some long-term improvement despite recent deterioration. Zambia has the lowest proportion at 15.1% (3.3 million), with a 3.3% rise year-on-year but a notable 17.5% decrease over two years, indicating relatively better progress compared to its neighbours. Overall, Malawi stands out as the most vulnerable, while Zambia shows signs of resilience over the longer term.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (November 2025)[22]

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	30.60	0.00	6.80	47.83
Mozambique	29.50	7.60	7.60	21.33	0.00	7.60	-9.52
Zambia	17.40	3.30	3.30	15.06	0.00	3.30	-17.50
Zimbabwe	15.20	4.50	4.50	26.55	0.00	5.80	-11.76

*Current month and **Previous month

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

Commodity Prices

Key drivers of prices in the Southern Africa region

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

Maize

Figure 11: National average price spreads for maize across select Southern African Countries[23]

[22] Author's construction based on HungerMap

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

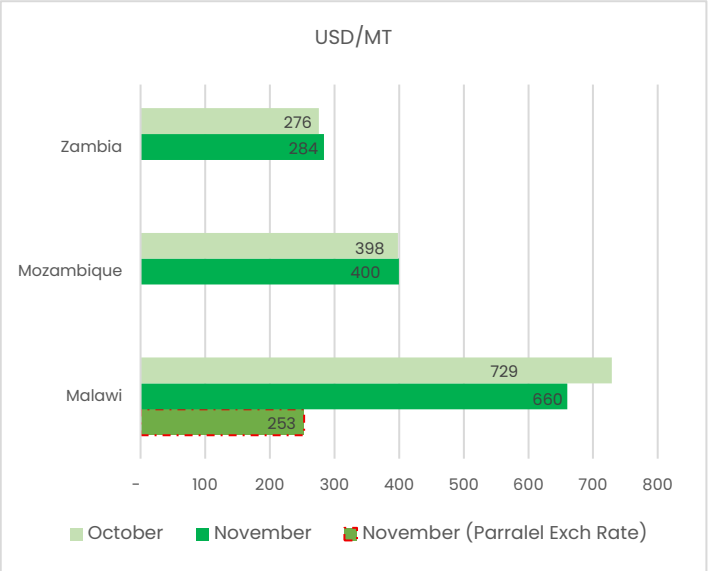


Figure 11 illustrates mixed price movements (in USD) for maize across Zambia, Mozambique, and Malawi between October and November. **Zambia** recorded a modest 2.9% increase to USD 284/MT, suggesting slight tightening or seasonal demand. **Mozambique** remained relatively stable, edging up to USD 400/MT (+0.5%), indicating minimal market pressure. In contrast, **Malawi** experienced a significant 9.5% decline to USD 660/MT, reflecting improved supply conditions.

When adjusted for the parallel market rate, the price falls further to USD 253/MT, making it the cheapest among the three countries.

Table 10 summarises maize price trends across selected Southern African markets, revealing mixed short-term dynamics and divergent medium-term patterns. **Malawi** recorded a sharp MoM decline (-9.4%) and is down 9.5% over three months yet remains significantly higher compared to six months ago (+29.9%) and 20.4% YoY, indicating persistent underlying pressure despite recent easing. **Mozambique** (white maize) was broadly stable MoM (+0.4%) but shows strong cumulative gains over three months (+41.2%) and six months (+93.5%), pointing to tightening domestic supply. **Zambia** (white maize, retail) rose MoM (+6.8%) and over three months (+16.2%) but remains well below mid-year and last year levels (-28.2% over six months; -25.6% YoY), consistent with post-harvest easing earlier in the period. In **Zimbabwe** (USD-denominated markets), maize grain (Epworth) spiked by 32.3% MoM and 18.6% YoY, while maize meal (Bulawayo) increased +7.7% MoM but fell over six months (-10.8%), suggesting processed product prices adjust more gradually and have softened on a medium-term basis.

Table 10: Percentage changes in maize prices in Southern Africa[24]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,137.73	-9.38 ↓	-9.54 ↓	29.85 ⊗	20.42 ⊗
Mozambique	Maize (white)	National Average, Maize (white), MZN/Kg	25.25	0.36 ▲	41.15 ⊗	93.52 ⊗	
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	6.48	6.82 ↑	16.19 ⊗	-28.19 ↓	-25.62 ↓
Zimbabwe	Maize	Epworth, USD/kg*	0.98	32.29 ⊗	1.14 ▲	0.00 ●	18.61 ⊗
Zimbabwe	Maize meal	Bulawayo, USD/kg*	0.84	7.68 ↑	0.60 ▲	-10.82 ↓	1.69 ▲

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

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

Rice

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

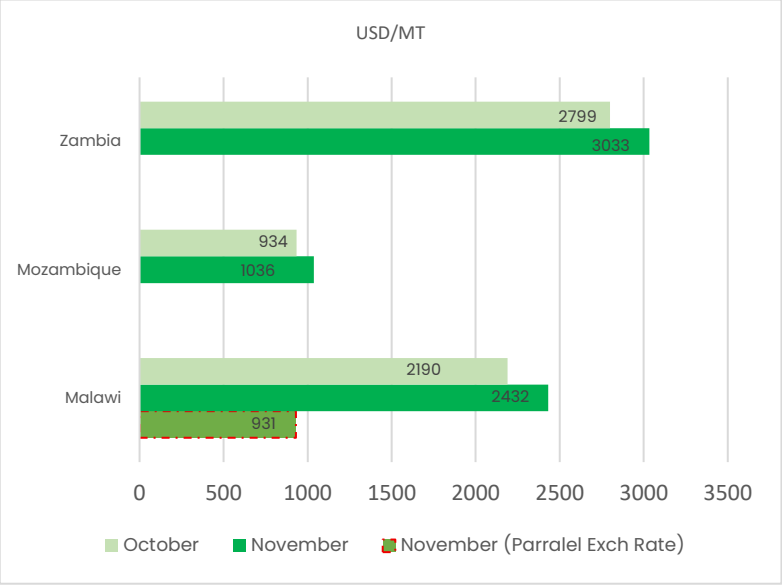


Figure 12 highlights national average rice prices across Zambia, Mozambique, and Malawi, showing broad-based increases between October and November, signalling tightening supply across the region. **Zambia** recorded the highest price level, increasing by 8.4% to USD 3,033/MT, reinforcing its position as a premium market. **Malawi** saw a notable month-on-month increase of 11%, reaching USD 2,432/MT, likely reflecting seasonal supply pressures. However, when adjusted for the parallel market exchange rate, the effective price falls to USD 931/MT, making Malawi the most affordable among the three countries. **Mozambique**, while comparatively lower-priced, saw a sharp 10.9% increase to USD 1,036/MT, indicating similar upward momentum.

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

As illustrated in **Table 11**, rice prices in local currency terms show strong MoM increases across all reporting markets, alongside divergent medium-term trends. **Malawi** recorded a substantial MoM increase of 11.0%, with prices being modest to significantly high over the past three months (6.4%) and six months (18.9%). Year-on-year rice prices are severely elevated by 91.5%, highlighting persistent structural tightness despite seasonal adjustments. **Mozambique** posted a 10.9% month-on-month increase and a three-month gain of 12.3%, but prices are 5.3% lower than six months ago, suggesting earlier easing or improved supply. **Zambia** saw prices climb 8.4% MoM and 6.3% over three months, yet remain 7.9% below six-month levels, pointing to post-harvest normalisation, although YoY prices are still higher by 22.0%. **Zimbabwe** experienced an exceptional 110.3% MoM spike, signalling a sharp, recent shock. However, three-month gains are modest (1.1%) and six-month trends moderately higher (7.1%), with YoY inflation at 79.3%, underscoring sustained cost pressures in USD-quoted markets.

Table 11: Percentage changes in rice prices in Southern Africa[25]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	4,190.74	11.01 ↑	6.43 ↑	18.92 ⊗	91.51 ⊗
Mozambique	Rice (imported)	National Average, MZN/Kg	65.50	10.94 ↑	12.34 ↑	-5.30 ↓	
Zambia	Rice (imported)	National Average, Retail, Kwacha/KG	69.35	8.36 ↑	6.30 ↑	-7.85 ↓	22.01 ⊗
Zimbabwe	Rice	Epworth, USD/kg*	2.25	110.28 ⊗	1.12 ▲	7.14 ↑	79.28 ⊗

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

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

Beans

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

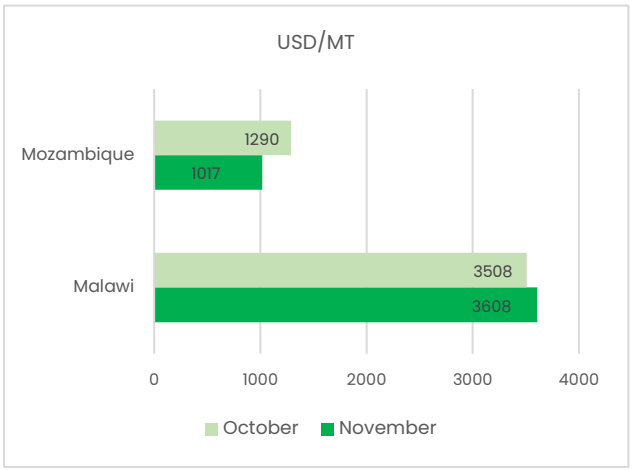


Figure 13 illustrates bean price trends for Mozambique and Malawi, showing contrasting movements between October and November. **Mozambique** recorded a sharp 21% decline month-on-month to USD 1,017/MT, indicating improved supply. In contrast, **Malawi** experienced a slight increase of 2.8% to USD 3,608/MT, maintaining its position as the highest-priced market in the region. In contrast, Malawi experienced a modest increase of 2.8% to USD 3,608/Mt, maintaining its position as the highest-priced market in the region.

Table 12 summarises beans and soybeans price movements across Malawi, Mozambique and Zimbabwe showing mixed short-term dynamics and divergent medium-term trends. In **Malawi,** bean, prices increased month-on-month by 2.87% but declined over three months by 7.87%. However, they remain significantly higher over six months at 21.7% and year-on-year at 39.3%, indicating persistent pressure despite the recent modest uptick. Soybean prices in Malawi show broader strength, with prices rising 7.1% month-on-month, 14.0% over three months, 51.4% over six months, and 56.7 percent year-on-year, reflecting tight oilseed supply and sustained demand from processors. In **Mozambique,** bean prices fell sharply month-on-month by 21.2%, are slightly lower over three months by 1.2%, and notably below mid-year by 32.9%, suggesting improved availability or import inflows. Year-on-year data is not reported. In **Zimbabwe,** beans recorded a steep month-on-month decline of 27.9%, yet prices are marginally higher over three months at 1.4%, flat over six months, and significantly higher year-on-year at 50.0%, implying a recent correction from elevated levels but persistent annual inflation.

Table 12: Percentage changes in beans prices in Southern Africa[26]

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	6,218.52	2.87	-7.87	21.67	39.32
Malawi	Soyabeans	National Average, MWK/Kg	3,028.13	7.12	14.03	51.41	56.71
Mozambique	Beans	National Average, MZN/Kg	64.28	-21.18	-1.22	-32.87	
Zimbabwe	Beans	Epworth, USD/kg*	3.00	-27.88	1.35	0.00	50.00

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

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

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

Fertiliser

Table 13 illustrates price trends for NPK and urea in Malawi and Mozambique, showing muted month-on-month changes but divergent medium-term patterns. In **Malawi**, NPK remained virtually unchanged month-on-month, increased by 2.9% over three months, and rose significantly by 23.8% over six months, though it is still 13.4% lower year-on-year. Urea strengthened slightly month-on-month by 1.2%, gained 5.2% over three months, and surged 30.8% over six months, yet remains 11.0% below last year's level—indicating recent recovery from mid-year lows despite annual moderation. In **Mozambique**, NPK declined marginally month-on-month by 0.4%, edged up 0.5% over three months, and rose 14.9% over six months; year-on-year data is not available. Urea increased 5.8% month-on-month and 6.8% over three months but fell 3.7% compared to six months ago, also with no year-on-year comparator. These price trends pose significant risks to farmers' cash flow during critical periods such as planting and top-dressing. Rising input costs increase overall production expenses, heightening the likelihood of under-application of fertilisers and, consequently, potential yield losses.

Table 13: Percentage changes in fertiliser prices in Southern Africa[27]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	NPK	National Average, MWK/Kg	3,320.73	-0.02	2.88	23.81	-13.37
Malawi	Urea	National Average, MWK/Kg	3,294.56	1.16	5.15	30.79	-11.04
Mozambique	NPK	National Average, MZN/Kg	69.69	-0.40	0.45	14.87	
Mozambique	Urea	National Average, MZN/Kg	67.32	5.83	6.79	-3.72	

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

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

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

Seasonal Monitor and Cropping Conditions

Across **Southern Africa**, planting for the 2025/26 main summer cropping season has commenced under generally favorable conditions. Most regions have received adequate moisture, supported the establishment of newly planted crops and signalling a positive start to the season. In **Malawi**, following the state of catastrophe declaration[28] by the President, development partners such as WFP and World Vision[29] have joined forces to support strengthening food security by providing agricultural inputs to more than 1,000 households in preparation of the planting season. In **Zambia** and **Zimbabwe**, wheat harvesting is nearing completion, with outcomes expected to range from mostly favourable to exceptional. However, critically low water levels at the Kariba Dam[30] pose a significant risk to power generation in both countries. This situation is likely to disrupt irrigation and other electricity-dependent agricultural activities, as dam levels may approach minimum operating thresholds by year-end.

In **Mozambique**, the main summer cropping season has begun under generally favourable conditions. However, persistent conflict in the northeast continues to disrupt agricultural activities, restricting access to farmland and essential inputs in Cabo Delgado province. The situation has further deteriorated as violence intensifies and spills into previously secure districts of Nampula province, exacerbating production challenges and undermining market stability.

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

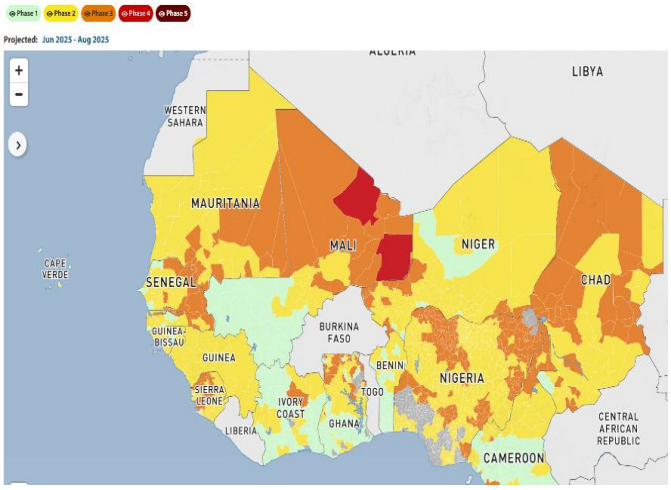
[28] Malawi Declares National Disaster Amid Chronic Food Insecurity Crisis - Ecofin Agency

[29] World Vision and WFP Join Forces to Strengthen Food Security For 1000 Households in Phalombe District | Malawi | World Vision International

[30] Agromet Update Issue 05 - 2012-2013 Season

West Africa Food Security Update

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



In **Burkina Faso**, food insecurity remains severe in conflict-affected communes. Crisis (IPC Phase 3) outcomes persist in Arbinda and Djibo, where markets have been largely unsupplied for months, harvests are exhausted, and humanitarian assistance remains insufficient and irregular reaching less than 20% of the population in Arbinda.[31] Households are relying on gathered foods and drastically reducing meal frequency, with some adults going entire days without eating. In Djibo, poor households face similar shortages, often consuming only one meal per day. In contrast, Sebba (Yagha province) has improved to Stressed (IPC Phase 2) following recent food assistance and market replenishment, which temporarily eased consumption deficits and reduced pressure on local stocks.

Mali's food security outlook remains fragile, with Crisis (IPC Phase 3) conditions persisting in Kidal and Ménaka due to soaring food prices, reduced incomes, and insecurity. Emergency (IPC Phase 4) will likely be in Ménaka by April 2026.[32] Gao, Mopti, Timbuktu, and northern Ségouare experiencing Stressed (IPC Phase 2) outcomes, while most other areas currently maintain Minimal (IPC Phase 1) thanks to ongoing harvests. However, insecurity, displacement, and a fuel blockade disrupting trade and transport are eroding livelihoods and purchasing power. Inflation and reduced irrigation capacity expected to worsen conditions. From April onward, food insecurity is likely to deteriorate further, with an early lean season anticipated in Bandiagara, Nara, Mopti, Macina, and parts of Niono. Many areas are projected to shift from Stressed to Crisis as households resort to negative coping strategies amid constrained market access and declining incomes.

In **Niger**, Crisis (IPC Phase 3**)** food insecurity persists in Tillabéry, Diffa, and northwestern Tahoua due to conflict-driven market disruptions, displacement, and flooding that have reduced agricultural production and income opportunities.[33] While national cereal output is near average and pastoral conditions are favourable, poor households in the affected areas continue to face severe consumption gaps. Markets outside conflict zones are well supplied, with staple food prices declining by up to 33% compared to the five-year average; however, access remains limited in insecure regions. Humanitarian assistance needs are high, yet response plans are only around 30% implemented due to funding shortfalls and security constraints, leaving many vulnerable households reliant on negative coping strategies.

Northern **Nigeria** faces severe food insecurity driven by persistent conflict, displacement, and disrupted harvests. In inaccessible LGAs of Borno State such as Guzamala, Abadam, Marte, and Bama households have minimal access to food and income sources ,with humanitarian assistance largely absent , resulting in Emergency (IPC Phase 4) outcomes through May 2026.[34] Across the broader North East, North West, and North Central regions, widespread Crisis (IPC Phase 3) conditions are expected as insecurity, below-average harvests, and high inflation erode purchasing power. Although inflation has eased slightly to around 16%, food prices and living costs remain high, compounding access challenges. In contrast, southern regions and the Federal Capital Territory are experiencing modest improvements from seasonal harvests and import waivers; however poor households still face high transport costs and limited incomes, maintaining Stressed (IPC Phase 2) outcomes through mid-2026.

Prevalence of Insufficient Food Consumption

In November, Niger recorded the highest proportion of people facing Insufficient Food Consumption (IFC) at 76.6% of its population (21.4 million) affected, highlighting an extreme food security crisis despite a slight improvement compared to two years ago (-2.7%). Mali follows, with 52.4% of the population (13.2 million) affected, reflecting persistent vulnerability with no significant change over two years. Burkina Faso also shows severe food insecurity, with 46.5% of its population (11.2 million) affected, marking an 11.2% increase year-on-year. Nigeria, while having the largest

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

absolute number of affected individuals at56.4 million, although the proportion is lower at 23.7%. Trends in Nigeria are volatile showing a of 101% increase from last year, but a 37.5% decline compared to two years ago. Ghana has 23.9% affected (8.4 million), marking a sharp 55.6% rise over two years, while Togo faces 27.8% affected (2.7 million), up 42.1% over two years. Côte d'Ivoire has the lowest proportion of affected people at 15.6%, though this remains 5.1% year-on-year. Overall, Niger and Mali exhibit the most severe proportional crises, while Nigeria's dominates regional totals in absolute numbers, highlighting a mix of chronic and emerging vulnerabilities across West Africa.

Table 14: Prevalence of Insufficient Food Consumption in selected West African countries (November 2025)[35]

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	46.53	0.00	11.20	1.82
Cote d'Ivoire	29.40	5.10	5.10	15.59	0.00	5.10	6.25
Ghana	29.80	8.40	8.40	23.96	0.00	8.40	55.56
Mali	19.10	13.20	13.20	52.40	0.00	13.20	0.00
Niger	25.90	21.40	21.40	76.65	0.00	21.40	-2.73
Nigeria	202.80	56.40	56.40	23.74	0.00	101.40	-37.47
Togo	7.90	2.70	2.70	27.78	0.00	2.70	42.11

**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.

Maize

Figure 15: Price spreads for maize across select West African Countries[36]

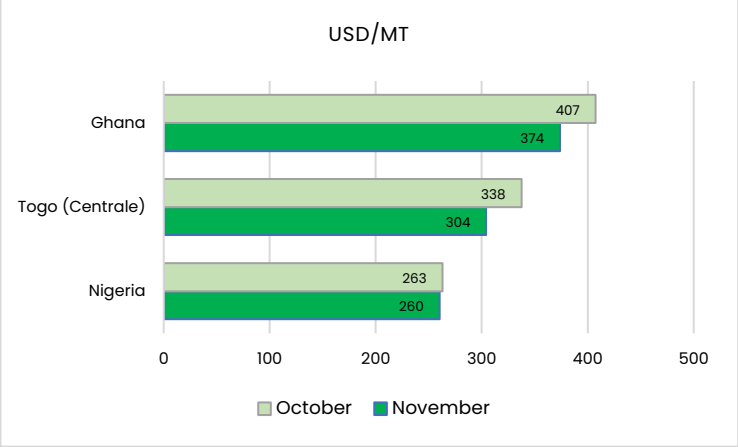


Figure 15 illustrates maize price trends in USD across selected West African countries, showing broad-based declines between October and November, indicating short-term easing across West African markets. **Ghana** recorded an abrupt drop, falling by 8.1% to USD 374/MT in November, likely reflecting improved supply from recently concluded harvests. **Togo** experienced a sharp 10% price decline month-on-month to USD 304/MT, indicating similar relief in market conditions. In **Nigeria**, prices fell marginally by 1% to USD 260/MT, indicating relative stability compared to neighbouring countries.

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

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

Table 15 presents white maize price trends across Ghana, Nigeria, and Togo, highlighting a general downward trajectory with isolated short-term spikes. Month-on-month, prices declined in Ghana (4.4%), Nigeria (1.2%), and Togo's regions—Centrale (10.0%), Maritime (33.3%), and Savanes (3.8%)—while Lomé (DAGL) recorded a sharp 44.7% increase, indicating a localised supply or logistics disruption. Over the past three months, most markets generally trended lower: Ghana (14.3%), Nigeria (5.5%), Lomé (14.3%), Maritime (28.8%), and Savanes (21.1%), with Centrale as the exception, posting a modest rise of 3.0%. Six-month comparisons reveal broad declines across all markets, led by Nigeria (44.2%) and Ghana (37.1%), followed by Togo's Maritime (31.6%), Savanes (30.8%), Centrale (25.9%), and Lomé (10.0%). Year-on-year prices remain significantly below last year's levels—Nigeria (48.8%), Ghana (32.7%), and Togo ranging between 30% and 40%—reflecting substantial medium-term easing likely driven by improved availability and seasonal inflows. Overall, these trends suggest regional price normalisation with isolated short-term volatility, notably in Lomé.

Table 15: Percentage changes in maize prices in West Africa[37]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	4,225.53	-4.39	-14.33	-37.13	-32.69
Nigeria	Maize (white)	National Average, NGN/KG	376.74	-1.22	-5.47	-44.23	-48.80
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg*	172.00	-9.95	2.99	-25.86	-30.36
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	233.00	44.72	-14.34	-10.04	
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg*	158.00	-33.33	-28.83	-31.60	-39.92
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg*	153.00	-3.77	-21.13	-30.77	-34.62

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

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

Rice

Figure 16: Price spreads for rice across select West African Countries[38]

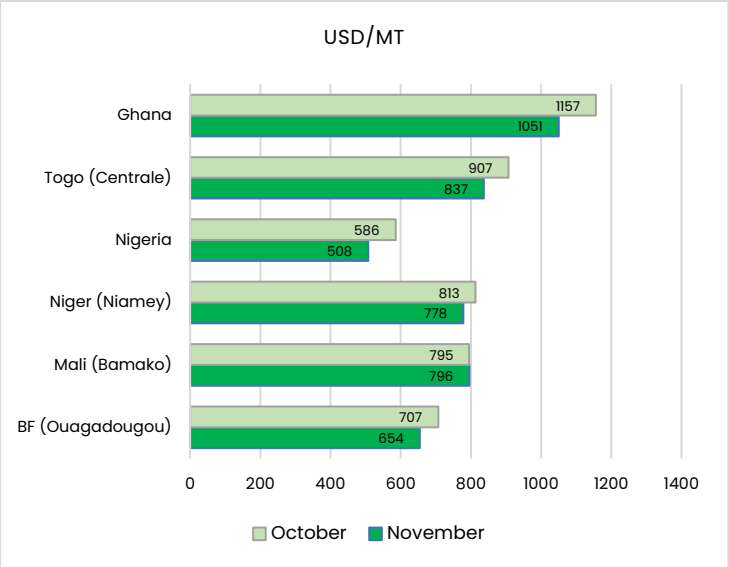


Figure 16 illustrates rice price movements in USD across six West African countries between October and November, showing broad softening in most markets and relative stability in Mali. **Ghana** recorded the highest price at USD 1,157/MT in October, before declining 9.2% to USD 1,051/MT in November, indicating improved supply conditions. Togo (Centrale) also eased by 7.7% to USD 837/MT, while Nigeria experienced the sharpest month-on-month drop, — down by 13.3% to USD 508/MT, reflecting seasonal new crop inflows and adjustments in import channels. Niger (Niamey) fell 4.3% to USD 778/MT, Burkina Faso (Ouagadougou) decreased 7.5% to USD 654/MT and Mali (Bamako) was effectively flat at USD 796/MT (+0.1%). Overall, these trends suggest improved local availability and early harvest inflows, with Ghana maintaining the highest-priced market despite the month-on-month correction.

Table 16 shows that rice prices in local currencies broadly softened month-on-month across regional wholesale and retail markets, while medium-term trends indicate general normalisation from mid-year highs and with a few pockets of resilience. **Burkina Faso** recorded the sharpest short-term declines, particularly in Bobo Dioulasso and Dédougou (around 23.5% lower), while Ouagadougou fell 7.5%. These decreases persisted over three and six months and remain 16–26% below year-on-year.

In **Mali**, most markets eased month-on-month, led by Sikasso, Kayes, and Mopti (8.9–10.7%), while Bamako was stable; longer-term trends show high single to low double-digit declines. **Niger** experienced gentler month-on-month movements of 2–3% across major markets, but deeper softening emerged over six months and year-on-year, with prices down 20–30%. **Nigeria**'s national average was largely flat month-on-month, yet fell 6% over three months, 19% over six months, and 22% year-on-year. Togo diverged from the regional pattern: Savanes dropped sharply (15.1%

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

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

month-on-month and 29% year-on-year), whereas coastal and central retail markets—Centrale, Lomé, and Maritime—recorded sustained gains over three and six months and remain 16–19% higher year-on-year, making them notable outliers. Overall, West Africa exhibits widespread price, with isolated resilience in Togo's coastal and central markets.

Table 16: Percentage changes in rice prices in West Africa[39]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg	32,500.00	-23.53	-23.53	-12.16	-22.62
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	43,500.00	2.35	-13.00	-13.00	-27.50
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	44,000.00	-2.22	-8.33	-21.43	-21.43
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	45,000.00	0.00	0.00	-10.00	0.00
Burkina Faso	Rice (imported)	Kongoussi, Wholeslae, XOF/100 kg	50,000.00	0.00	-9.09	-16.67	25.00
Burkina Faso	Rice (imported)	Nouna, Wholesale, XOF/100 kg	55,000.00	0.00	0.00	0.00	-8.33
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	37,000.00	-7.50	-7.50	-19.57	-26.00
Burkina Faso	Rice (imported)	Tenkodogo, Wholesale, XOF/100 kg	47,500.00	5.56	-5.00	0.00	-7.32
Mali	Rice (imported)	Bamako,Wholesale, XOF/100 KG	41,000.00	0.00	-2.38	-14.58	-14.58
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	56,000.00	0.00	0.00	-6.67	-9.68
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	31,500.00	-3.08	-4.55	-17.11	-23.17
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	45,000.00	0.00	-10.00	-10.00	-10.00
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	41,000.00	-8.89	-14.58	-14.58	-20.00
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	480.00	0.00	-7.69	-20.00	-31.43
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	480.00	0.00	-7.69	-11.11	-20.00
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	420.00	0.00	-12.50	-12.50	-32.26
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	440.00	-4.35	-10.20	-15.38	-26.67
Niger	Rice (imported)	Tillaberi, Wholesale, XOF/Kg	440.00	-8.33	-12.00	-15.38	-29.03
Niger	Rice (imported)	Zinder, Wholesale, XOF/Kg	460.00	0.00	-8.00	-9.80	-25.81
Nigeria	Rice (milled)	National Average, NGN/KG	735.00	-13.42	-18.75	-39.18	-45.05
Togo	Rice (imported)	Centrale,Retail, XOF/Kg*	473.00	-7.80	-29.40	-3.07	-4.64
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	649.00	42.95	4.85	0.31	
Togo	Rice (imported)	Maritime,Retail, XOF/Kg*	537.00	-14.08	10.49	-1.65	-18.64
Togo	Rice (imported)	Savanes,Retail, XOF/Kg*	454.00	-15.14	-2.37	-20.49	-28.73

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

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

Millet

Figure 17: Price spreads for millet across select West African Countries[40]

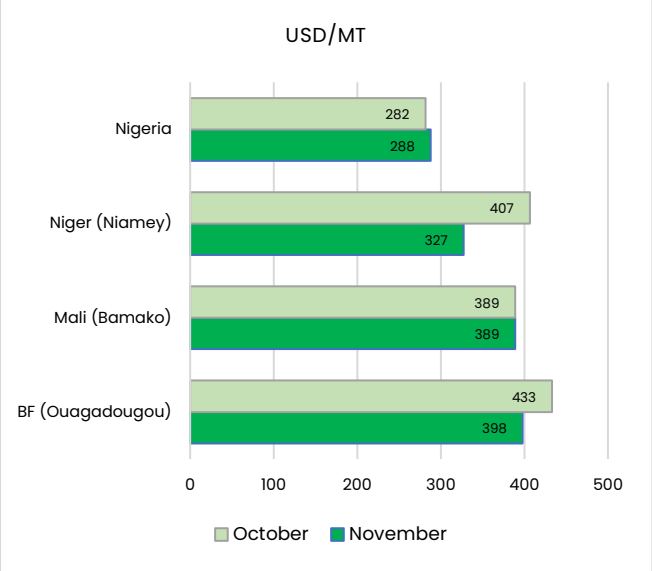


Figure 17 illustrates millet price movements in USD across four West African countries between October and November, showing mixed trends. **Nigeria** recorded a modest increase of 2.2%, rising to USD 288/MT, indicating localised demand pressure. Conversely, **Niger (Niamey)** experienced the sharpest decline, dropping by 19.7% month-on-month to USD 327/MT, likely due to improved supply from early harvest inflows. **Burkina Faso (Ouagadougou)** also experienced a significant decrease of 8.1%, moving to USD 398/MT, while **Mali (Bamako)** remained stable at USD 389/MT, indicating balanced supply-demand conditions. Overall, the declines in Niger and Burkina Faso point to seasonal availability improvements, while Nigeria's slight uptick signals persistent localised constraints.

Table 17 shows that millet prices across Burkina Faso, Mali, Niger, and Nigeria were mostly stable to softer month-on-month, with some localised variations. In **Burkina Faso**, several wholesale markets were flat month-on-month (e.g., Bobo Dioulasso, Nouna, Ouagadougou, Tenkodogo), while Fada Ngourma registered a sharp short-term decline of 13.8 %and Dori eased by 4.8%; over three to six months. In **Mali**, month-on-month changes are

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

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

minimal overall, with Ségou showing a moderate uptick of about 14.29%. Over three to six months, prices broadly softened in the high single digits to around 20%, while year-on-year levels fell markedly by 41–43%, reflecting medium-term easing.

Niger presents mixed short-term signals. Prices rose in Dosso and Maradi increased by 2.17% and 28.57% month-on-month respectively, whereas other markets including Niamey, declined by up to 19.57%. Longer-term trajectories indicate widespread easing, with year-on-year levels down by roughly 40%. **Nigeria**'s national average rose 2.05 % month-on-month but remains lower over three months (about 10%), six months (about 27.7%), and year-on-year (about 43.2%). Overall, the medium-term pattern reflects regional price normalisation from earlier highs, with pockets of short-term firmness (Dosso, Maradi) and some markets remained unchanged potentially reflecting thin trading or data stability. Broadly lower year-on-year levels point to improved availability in the medium term, while localised volatility and market-specific dynamics continue to shape short-term price movements.

Table 17: Percentage changes in millet prices in select West African Countries[41]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	38,000.00	0.00	0.00	0.00	0.00
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	22,500.00	0.00	-25.00	-30.77	-43.75
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	30,000.00	-4.76	-21.05	-25.00	-33.33
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	25,000.00	-13.79	-21.88	-24.24	-13.79
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	37,500.00	0.00	-11.76	-11.76	-17.58
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	22,500.00	-11.76	-25.00	-30.77	-35.71
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	22,500.00	-8.16	-18.18	-31.82	-43.75
Burkina Faso	Millet	Tenkodogo, Wholsale, XOF/100 kg	30,000.00	-7.69	-25.00	-29.41	-32.20
Mali	Millet	Bamako, Wholesale, XOF/100 KG	22,000.00	0.00	-12.00	-20.00	-41.33
Mali	Millet	Gao, Wholesale, XOF/100 KG	33,500.00	3.08	-4.29	-10.67	-22.09
Mali	Millet	Kayes, Wholesale, XOF/100 KG	28,000.00	0.00	0.00	-3.45	-31.71
Mali	Millet	Mopti, Wholesale, XOF/100 KG	23,000.00	0.00	-17.86	-26.98	-36.99
Mali	Millet	Ségou, Wholesale, XOF/100 KG	20,000.00	14.29	-11.11	-23.08	-33.33
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	22,500.00	-18.18	-10.00	-10.00	-43.04
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	35,000.00	-12.50	-4.11	6.06	-14.11
Niger	Millet	Agadez, Wholesale, XOF/Kg	270.00	-6.25	-32.50	-32.50	-20.59
Niger	Millet	Dosso, Wholesale, XOF/Kg	235.00	2.17	-12.96	-12.96	-6.00
Niger	Millet	Maradi, Wholesale, XOF/Kg	180.00	28.57	-14.29	-28.00	-28.00
Niger	Millet	Niamey, Wholesale, XOF/Kg	185.00	-19.57	-36.21	-36.21	-33.93
Niger	Millet	Tillaberi, Wholesale, XOF/Kg	240.00	-7.69	-20.00	-22.58	-20.00
Niger	Millet	Zinder, Wholesale, XOF/Kg	240.00	-11.11	-25.00	-20.00	-20.00
Nigeria	Millet	National Average, NGN/KG	416.48	2.05	-10.07	-27.70	-43.24

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

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

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

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

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries[42]

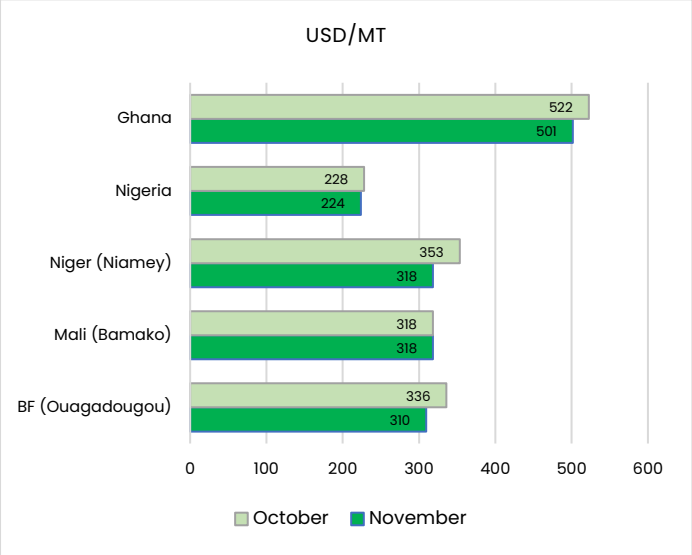


Figure 18 illustrates sorghum price movements in USD across five West African countries between October and November, showing a general downward trend with minor exceptions. **Ghana** retained the highest price level, though it declined by 4.0% to USD 501/MT, reflecting improved supply conditions. **Nigeria** recorded a slight decrease of 1.8%, moving to USD 224/MT, while **Niger (Niamey)** saw a sharper drop of 9.9%to USD 318/MT, likely driven by seasonal harvest inflows. **Burkina Faso (**Ouagadougou**)** experienced a notable decline of 7.7%, falling to USD 310/MT, whereas **Mali (**Bamako**)** remained unchanged at USD 318/MT, indicating balanced supply-demand dynamics. Overall, the price corrections across most markets suggest improved availability and easing pressure on sorghum prices, with Ghana continuing to trade at a premium compared to other countries.

Table 18 mirrors USD price trends in local currencies, showing prices were mostly stable to softer month-on-month, with a few localised moves. In **Burkina Faso**, several wholesale markets were flat over the month, while Ouagadougou saw a 7.89% decline and Fada saw the highest month-on-month decline of 24% signifying improved supply from recent harvests. Over three to six months most markets have declined by roughly the mid-twenties to mid-thirties percent, with year-on-year levels generally down from the tens to about one-third.

Ghana's national average was broadly unchanged month-on-month, with medium-term comparisons indicating material easing from earlier highs. In **Mali**, most markets were steady on the month, although Gao dropped by about 14%; three- and six-month trends point to broad softening from high single-digit to low-twenties percent, and year-on-year levels are markedly lower, often around thirty to forty percent.

Niger presents mixed short-term signals: Agadez, Maradi and Tillaberi markets recording price increases of 7.69%, 7.14% and 4.76 % month-on-month respectively, while Tombouctou fell by 12.50% but remains 9.38% above six months ago, suggesting some easing from previous inflationary pressure. **Nigeria**'s national average eased by about 2.1% month-on-month and is lower by around 16% over three months, 42% over six months, and 58% year-on-year. Overall, the medium-term pattern signals regional price normalisation from earlier peaks, with isolated short-term volatility and a few pockets of firmness amid broadly lower year-on-year levels.

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

Table 18: Percentage changes in sorghum prices in select West African countries [43]

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	21,500.00	-6.52	-4.44	-4.44	-8.51
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	16,500.00	-5.71	-34.00	-56.00	-45.00
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	25,000.00	-3.85	-24.24	-28.57	-27.54
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	19,000.00	-24.00	-26.92	-29.63	-29.63
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	25,000.00	0.00	0.00	-9.09	-16.67
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	19,000.00	0.00	-24.00	-24.00	-30.91
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	17,500.00	-7.89	-16.67	-36.36	-37.50
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	17,000.00	-8.11	-38.18	-37.04	-39.29
Ghana	Sorghum	National Average, (GHS/MT)	5,666.67	0.00	0.00	-17.34	-34.36
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	18,000.00	0.00	-10.00	-14.29	-18.18
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	30,000.00	-14.29	-14.29		
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	24,000.00	0.00	-4.00	-4.00	-29.41
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	19,000.00	0.00	-17.39	-20.83	-40.63
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	17,500.00	0.00	-12.50	-20.45	-41.67
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	19,000.00	-5.00	-5.00	-9.52	-33.91
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	35,000.00	-12.50	-1.41	9.38	-6.67
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	280.00	7.69	-30.00	-30.00	-22.22
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	230.00	-2.13	-8.00	-14.81	-16.36
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	150.00	7.14	-25.00	-33.33	-48.28
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	180.00	-10.00	-21.74	-30.77	-48.57
Niger	Sorghum	Tillaberi, Wholesale, XOF/Kg	220.00	4.76	-24.14	-26.67	-29.03
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	200.00	0.00	-13.04	-9.09	-35.48
Nigeria	Sorghum (white)	National Average, NGN/KG	323.92	-2.05	-16.03	-41.80	-57.92

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

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

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

Seasonal Monitor and Cropping Conditions[44]

In **West Africa**, harvesting of main-season cereals is nearly complete under generally favourable conditions, supported by average to above-average rainfall and adequate distribution throughout most of the season. While some areas experienced localised impacts from rainfall deficits and flooding, overall weather patterns were conducive to crop development. However, production outcomes remain constrained in regions affected by persistent insecurity and socio-economic challenges. Aggregate cereal output for the subregion is projected at 82.9 million tonnes[45], representing a 10.4% increase over the five-year average and 7.3% above last year's campaign, signaling strong regional performance despite localised constraints.

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

[44] EarlyWarning_CropMonitor_202510.pdf

[45] Opinion of the PREGEC Welcome to the website of the Regional Climate Centre for West Africa and the Sahel – AGRHYMET CCR-AOS Opinion of the Regional Consultation of the Food Crisis Prevention and Management Mechanism (PREGEC), November 2025 - Welcome to the website of the Regional Climate Centre for West Africa and the Sahel - AGRHYMET CCR-AOS

Food Trade Updates

East Africa Region

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, November 2025

Tanzania

Vodacom Tanzania launches M-Pesa Global Payment to enable cross-border transactions. Vodacom Tanzania is revolutionising cross-border trade and digital financial inclusion with the launch of M-Pesa Global Payment. In partnership with VISA, Alipay, Network International, Magnati, and MTN Uganda, customers can now make global Tap&Pay transactions using the M-Pesa Visa tokenized card, pay merchants in China via Alipay, enabled by Thunes, transact in Dubai through TerraPay-supported merchants, and pay merchants in Uganda directly into MTN MoMo wallets, powered by Thunes, all from the M-Pesa menu or the M-Pesa Super App.

Kenya & Uganda

- Kenya and Uganda have joined Malawi and Zambia in signing the second Mutual Recognition Agreement (MRA) in goods trade, the first of its kind on the continent. The MRA is key instrument to support a more predictable environment for regional food trade and provide some flexibility in reducing the time and costs of trading by eliminating the need for redundant and repeated testing and/or certification.
- The Government of Kenya has launched a new digital platform, eCustoms App, designed to simplifying trade, speeding up goods clearance, and modernising Kenya's border operations. The system will allow KRA to process customs declarations faster, be paperless, and be more efficient, benefitting traders, transporters, and passengers.

Monitoring Food Policy and Trade Developments

Southern and West Africa

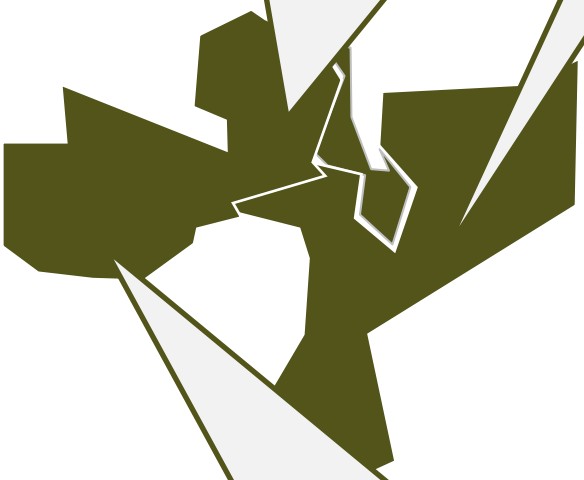
Monthly Summary

November 2025

Country snapshot – Southern Africa

Zambia: Almost half of the FRA payments to farmers for maize deposits remain outstanding, forcing the government to agree a financing package from local banks. This issue, plus struggles distributing fertiliser as part of the FSP, has negatively impacted farmers preparations for the incumbent planting season. The issue stems from Zambia's bumper harvest, which has also highlighted insufficient storage infrastructure for excess maize. Unsecured maize is now at risk of spoilage as the rainy season has now begun – albeit positively from a climate perspective. Exacerbating the issue, Zambia's export deal with Malawi has stalled, meaning that some of the surplus maize remains in unsecured locations.

Malawi: The Malawian government is struggling to finance the import of 200,000 tonnes of maize from Zambia, which has put the deal on hold for now, although the government is in advanced talks with the IMF for a credit facility to fund the trade. There is a shortage of certified seed and fertiliser for the incumbent growing season, which is likely to have a negative impact on next year's yield. Despite the deficit, the government has begun distributing fertiliser as part of the revamped FISP, which is seeking to provide inputs to 1.1 million farmers, more than double the coverage of the previous programme.



Mozambique: Food trade along the Mozambique-Tanzania has declined due to rising insecurity and a tighter border control on the Tanzania side, negatively affecting food security of communities in northern Mozambique, who rely on food trade with Tanzania. One of the reasons for the deteriorating relations between Tanzania and Mozambique is a perceived strengthening of the relationship between Mozambique and Rwanda following the signing of the SOFA agreement in August. According to sources, Rwandan companies are now seeking to enter Mozambique's agriculture sector. To address food insecurity, the government has increased grain production targets for next year, although it has not outlined tangible measures to achieve this goal.

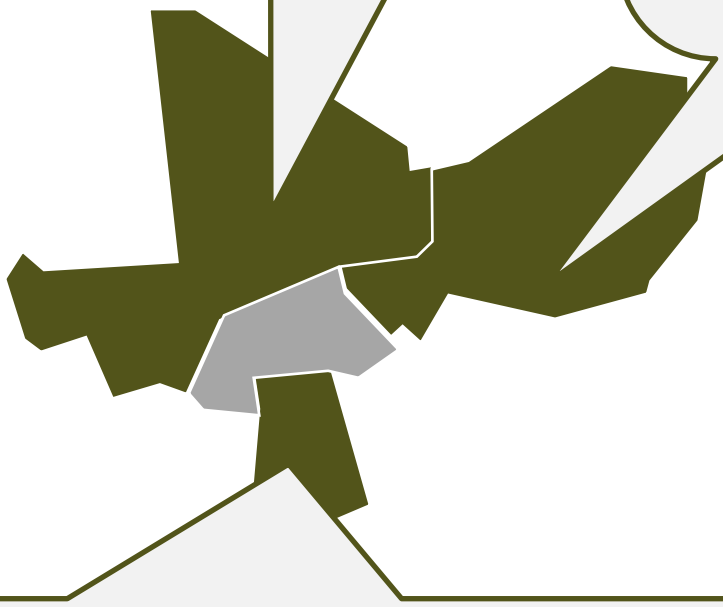
Food security and trade developments

Country	Headline summary
Malawi	• **Input distribution under the national subsidy scheme has begun**, with lower prices for farmers and more households targeted. However, rollout delays have constrained early uptake, with only **8,000 farmers** redeeming inputs so far. • **The maize deal with Zambia remains on hold, as Malawi has been unable to meet the required 40% down payment**. The agriculture minister has confirmed that distribution plans for high-risk areas are in and can proceed once the maize is imported. Sources within the Malawian government told us that the government is in advanced talks with the IMF for a credit facility to finance the deal, while there is no indication that the private sector is positioning itself to participate in the deal. • **Spot checks at market sites indicate maize prices remain high**, MWK 75,000 (USD 43) per 50kg bag in Blantyre); input prices on the commercial market (outside FISP) are also high. • **A shortage of certified seed is likely to have a negative impact on yields next year**, while processors are projecting shortages in milled rice and other processed products due to competition from foreign buyers for rice paddy and green coffee beans.
Mozambique	• **Food security remains at crisis levels (IPC Phase 3) in northern Mozambique.** The region is reliant on informal cross-border trade from Tanzania, which has been interrupted by border restrictions between Mozambique and Mtwara in Tanzania. • **Many Tanzanian farmers have abandoned their farms on the Mozambique side due to the worsening risk posed by insurgents.** Looting and stealing of food is putting further strain on remaining supplies. • **The government announced targets to increase grain production by 7% on 2025 levels in the 2026 harvest season**. However, tangible measures to achieve these goals have not been announced.
Zambia	• **Zambia's maize export deal with Malawi has stalled:** The Malawian government is struggling to raise the initial downpayment for the deal. Despite political will to build trade relations between the two countries, the Zambian government is unwilling to export maize on credit, while no private sector actors have shown any intertest in providing financing for the deal. The logistics are in place in Zambia to deliver the maize, should Malawi follow through with payment. • **Many farmers yet to receive payment for maize deposited with the FRA:** Almost half of the ZMW 11.3 billion (USD 494.5 million) owed to farmers remains unpaid, which, according to sources within the Zambia Farmers Union, is causing discontent among Zambian farmers and negatively impacting their preparations for the current planting season. • **With the onset of the rainy season, maize that is not adequately stored is at high risk of spoilage:** According to sources, there is insufficient storage infrastructure to house the maize, especially given the above-average harvest. There is little appetite from the private sector to invest in new storage infrastructure due to the low potential returns. • **The rainy season has started positively:** There has been rain in main parts of the country, with forecasts suggesting that there will be above-average rainfall throughout the rainy season. • **EIB Global and ZICB sign €30 million financing package:** The loan facility is designed to support agri-food SMEs in Zambia, and includes a gender-inclusive component, with at least 30% of the funds intended for women-led or women-owned agribusinesses.

Country Snapshot – West Africa

Mali: Fuel blockades and escalating militant activity continue to severely disrupt the movement of agricultural goods, contributing to acute food insecurity in Bamako and other urban centres. In response, both smallholder and large-scale commercial farmers have undertaken informal adaptation strategies such as local bartering networks and working with trusted religious leaders. Malian authorities are yet to establish emergency measures to support agricultural producers and trade affected by the conflict. While IFC-BNDA financing support has the potential to expand credit to agricultural SMEs, scepticism over BNDA's institutional capacity and compliance with producers raises doubt over the efficacy of the new agreement.

Niger: Cereal prices remain below 2024 levels following strong harvests, but insecurity has severed distribution networks in northern conflict zones. As a result, producers in Tillabéry and Dosso are selling millet at 10,000-15,000 FCFA (USD16-USD25) per 100kg, below production costs. Adding to food insecurity in these regions, armed groups and military forces have been requisitioning village stocks. The export ban remains in force with limited AES exemptions, although informal cross-border trade continues through Nigeria. Storage capacity remains critically low at just 28% of what is required in Diffa, leaving conflict-affected regions vulnerable ahead of the lean season despite the national surplus.



Ghana: Over 1.2 million tonnes of rice, maize, and soybeans remain unsold, with farmers unable to cover production costs. NAFCO's additional GHS 200 million (USD 18 million) in procurement funding has proven insufficient to absorb the surplus. The government is maintaining the grain export ban to keep food prices low, with no timeline for lifting restrictions. Regional informal trade channels that previously absorbed surplus have been disrupted by military rule in Burkina Faso and policy changes in Nigeria. Farmers and processors are planning to reduce production or change crops for next season in response to sustained losses.

Food security and trade developments

Country	Headline summary
Ghana	• Over 1.3 million tonnes of paddy rice remains unsold in the Northern and Volta regions alongside substantial maize stocks. NAFCO's GHS 100 million (USD 6.2 million) emergency procurement programme is offering floor prices below production costs. • The grain export ban continues despite farmer calls to open access to Nigeria and Sahel countries where demand exists. Meanwhile, markets are flooded with smuggled rice entering through Togo and Côte d'Ivoire borders, with politically connected traders and institutional buyers sourcing mixed supplies. • With insufficient profitable offtake channels, farmers across grain sectors indicated they will reduce acreage next season, while rice producer associations are planning unprecedented protests across the country.
Mali	• Widespread insecurity has begun to alter food trade patterns in recent months, forcing farmers to undertake localised adaptive strategies, and driven mass displacement in key agricultural regions. • Deteriorating fuel shortages due to recent blockades have severely constrained agricultural production and trade, with farmers suffering significant income losses. • Private sector stakeholders in the agriculture sector face increasing operational difficulty due to worsening insecurity. • BNDA and IFC announce financing deal to support agricultural SMEs in Mali.
Niger	• Year-on-year declines of 24-28% reflect strong harvests, but distribution networks in northern conflict zones have collapsed. Producers in Tillabéry and Dosso sell millet at 10,000-15,000 FCFA (USD16-USD25) per 100kg, below production costs, as armed groups and military forces requisition stocks. • The Nigerian border has emerged as a more popular route for informal trade than the border with Benin. • Diffa registered only 28% storage rate as of mid-November. Weak harvests and informal storage in residential compounds leave conflict zones vulnerable, with stocks expected to deplete by February despite national surplus.
Regional	• Closer strategic partnership between Sahelian states and Russia will primarily focus on mining, with no indication there will be significant collaboration on agriculture. • In November, Burkina Faso hosted the first forum for Sahelian seed producers with the aim of promoting regional food sovereignty.

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

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AFRICA FOOD TRADE AND RESILIENCE INITIATIVE

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