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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 67th edition provides an overview of the food security situation and market prices across East, Southern, 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 March 2026 Food Security Monitor edition:

Food Commodity Prices Updates

Eastern Africa's staple food markets show mixed month-on-month movements, reflecting post-harvest supply shifts and steady cross-border trade, but prices remain above annual averages due to high fuel costs, currency depreciation, and broader economic pressures. Maize prices are the most volatile, rising sharply in Uganda (+22%), South Sudan (+14%), and Ethiopia (+7.7%) amid tight supplies, while Kenya, Rwanda, and Tanzania record moderate declines from temporary easing. Rice markets diverge, with increases in South Sudan (+6.9%), Uganda, and Rwanda due to tightening conditions, contrasted by slight declines in Kenya and Tanzania on stable availability. Bean prices generally soften, notably in Tanzania (-4.4%) and Uganda (-4.9%), reflecting improved seasonal supply, though Kenya sees modest firming. Fertilizer prices adjust sharply downward in Uganda—NPK (-59.7%) and DAP (-22.8%)—following improved availability, easing earlier geopolitical supply fears, even as year-on-year staple prices remain elevated across the region. However, staple food prices across much of East Africa are expected to trend upward in the coming months, driven by tightening local supplies and sustained regional demand, with additional upward pressure stemming from rising fuel and freight costs linked to the escalation of conflict in the Middle East.

West Africa's staple food markets are easing month-on-month, supported by post-harvest supply recovery, import inflows, and seasonal normalization, though localized volatility persists. Maize prices fall sharply in Ghana (-13.8%) and Togo (-8.1%), remain broadly stable in Nigeria (+1.2%), and are substantially lower year-on-year, particularly in Ghana (-54.2%), reflecting a strong adjustment from last year's elevated levels. Rice prices also soften widely, led by Ghana (-17%), with modest declines across Sahelian markets due to improved availability and steady trade flows. Millet prices show mixed short-term movements, rising in Nigeria (+12%) and Burkina Faso (+3%), but remain well below last year's levels, while sorghum prices are stable to lower, declining in Ghana (-10%), Nigeria (-4%), and Mali (-3%). Overall, despite pockets of pressure linked to insecurity and early lean-season dynamics, year-on-year price declines underscore improved supply conditions and partial market normalization across the region.

Southern Africa staple food markets continue to reflect generally abundant supply conditions and favourable harvest prospects, with prices easing across major producing countries over the medium to long term. This broad moderation is being driven by harvest progress, currency dynamics, and localized supply adjustments. In the short term, maize prices increased month on month in Malawi (+16%) and Mozambique (+6%) amid localized supply tightness, while Zambia remained broadly stable (-1%). Nevertheless, year-on-year prices are lower across all markets (-21% to -25%), indicating substantial normalization from last year's elevated levels, including in Zimbabwe, despite isolated market-specific spikes. Fertilizer markets recorded the sharpest adjustments, most notably in Mozambique, where NPK prices declined by 53%, improving input affordability, although year-on-year fertilizer prices remain elevated in Malawi, reflecting ongoing macroeconomic pressures. With the onset of green harvests in parts of the region and the main harvest season expected from May, maize prices are projected to ease further. In the interim, lean-season tightening is likely to persist in structurally deficit areas, though sizeable carryover stocks in Zambia and Tanzania should help limit upward price pressure. These supply-driven gains may, however, be partially offset by rising fuel costs, which are expected to increase transport and marketing expenses in the near term.

Food Security Updates

- The escalation of the **US-Iran conflict** and its spillover across the Gulf has triggered a major systemic shock to global food systems, with Africa among the hardest-hit regions. The effects on African agriculture are transmitted rapidly through globally interconnected supply chains, particularly energy, fertilizer, trade, and logistics networks. Sharp increases in global oil prices have pushed fuel costs upward across many African countries, raising the price of transportation, logistics, and agricultural production. Producers in South Africa report that diesel shortages are threatening the movement of goods, while Nigeria is experiencing fuel-driven inflation. Similar spikes are evident across East and Southern Africa: Tanzania's fuel price rose by 12%, Zambia's by 10%, Mozambique's by 13%, and Ethiopia's by 16%. These surges directly raise costs for land preparation, irrigation, processing, and distribution, core activities that underpin agricultural productivity. In contrast, some governments, e.g. Kenya, have intervened to reduce fuel prices over the period. With the Middle East supplying roughly 30% of global nitrogen fertilizers, disruptions to production and shipping have led to tighter fertilizer supplies, steep price increases, and delays. Fertilizer prices have risen by 30–45% in many African markets since the conflict began, with Nigeria and Ghana reporting jumps of nearly 40% and 35% respectively. Shortages and shipment delays are now widespread, from Senegal and Côte d'Ivoire to Malawi, Zambia, and Mozambique, threatening critical planting seasons, especially for smallholder farmers who depend on timely, affordable

input access. Without adequate fertilizer, farmers risk reducing application rates, switching to lower-input crops, or missing entire planting windows, with projected yield declines of 12–20% in countries such as Kenya, Nigeria, and Ghana.

- Acute food insecurity across **East Africa** remains exceptionally severe and is projected to worsen in several areas, driven by a convergence of conflict, climatic shocks, displacement, high food prices, and constrained livelihoods. As of March 2026, tens of millions of people across the sub-region are facing Crisis or worse (IPC Phase 3+), with pockets of Emergency (IPC Phase 4) and famine risk (IPC Phase 5), particularly in conflict-affected and flood-prone areas. In Ethiopia and Kenya, limited and uneven seasonal improvements from rainfall and planting are being offset by persistent market disruptions, high fuel and food prices, low livestock productivity, and elevated malnutrition, while conflict continues to constrain access in northern Ethiopia. South Sudan remains one of the most concerning contexts, where protracted conflict, flooding, macroeconomic collapse, and restricted humanitarian access are sustaining widespread Crisis and Emergency conditions, with some areas at risk of famine. In Uganda, severe food insecurity persists in Karamoja and refugee-hosting areas amid poor harvests, declining assistance, and limited income opportunities. Overall, despite localized seasonal gains, the scale and severity of acute food insecurity in East Africa underscore deep structural vulnerabilities and the urgent need for sustained humanitarian assistance alongside measures to stabilize markets, support livelihoods, and improve conflict and shock resilience.
- Food security conditions across **Southern Africa** remain uneven, characterized by improving outcomes in some areas alongside persistent stress and crisis in others. In Malawi, food security has improved markedly compared to last year, with Minimal (IPC Phase 1) outcomes prevalent across much of the central and northern regions, supported by relatively typical livelihood activities, grain imports, humanitarian assistance, and an anticipated near-average main harvest, although Stressed (IPC Phase 2) outcomes persist in parts of the south due to high prices and constrained purchasing power. In contrast, Mozambique continues to face Crisis (IPC Phase 3) outcomes in flood-, drought-, and conflict-affected areas, where repeated climatic shocks and insecurity have significantly reduced food production, incomes, and household food stocks, with only modest, short-lived gains expected from the forthcoming harvest. Similarly, Zimbabwe remains under strain, with Crisis (IPC Phase 3) outcomes persisting in deficit-producing zones after a harsh lean season, though gradual improvements are anticipated following the April/May harvest. Across the region, persistently high staple food prices, weather-related production shocks, and rising fuel and input costs linked to global market pressures, particularly from the Middle East conflict, continue to erode purchasing power and pose risks to livelihoods and future agricultural production, leaving poor households vulnerable despite seasonal improvements.
- Across **West Africa**, acute food insecurity remains widespread and is increasingly driven by insecurity, displacement, and high food prices, with Crisis (IPC Phase 3) outcomes persisting across large parts of the central Sahel and northern Nigeria and localized Emergency (IPC Phase 4) conditions in the most conflict-affected and inaccessible areas. In Burkina Faso, Mali, and Niger, insecurity continues to disrupt livelihoods, markets, and agricultural activities, constraining food access for poor households despite generally average national cereal availability in more secure zones and seasonal income from off-season or vegetable production; humanitarian assistance is preventing worse outcomes in some areas but needs are expected to peak during the June–September lean season. In Mali and Niger, displacement and erosion of livelihoods are intensifying consumption gaps, with Emergency conditions emerging or expected in highly insecure areas. In Nigeria, escalating violence in the North East, North West, and North Central is undermining land preparation and income generation at the start of the main agricultural season, while persistently high food, fuel, and transport costs continue to erode purchasing power despite macroeconomic improvements. Across the region, spillover effects from the Middle East conflict, including higher fuel and transport costs, add further inflationary pressure, heightening risks of seasonal deterioration for vulnerable households.

Food Trade Updates

- The Kenya Revenue Authority (KRA) has announced the implementation of the East African Community (EAC) Customs Bond, effective 23 March 2026. The new system enables traders and clearing agents to use a single, region-wide guarantee recognized by all EAC Partner States when transporting goods across borders. This marks a significant shift from the current arrangement, under which each member state requires its own national bond. With the introduction of a unified customs bond, cross-border trade is expected to become more efficient, less costly, and easier to administer across the entire EAC region.

Introduction

The AGRA Food Security Monitor reviews and discusses changes in selected variables and their implications for 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 March 2026 across 17 countries in Eastern, Southern, and Western Africa.

In March 2026, Mali and Niger followed by Burkina Faso and South Sudan, remained the hunger hotspots. On the flip side, Tanzania, Zambia, and Côte d’Ivoire continued to be the least vulnerable among those monitored. Across monitored countries, IFC levels showed no monthly or annual change, except in Nigeria, where IFC declined sharply by 40.4% compared to the same period last year.

With regards to commodity price trends, table 1 below shows a broad decline in staple commodity prices over the past six and twelve months across West Africa, where maize and imported rice prices fell in all monitored countries, alongside Malawi, which recorded declines of 16.5% over six months and 21.6% over one year. In contrast, price trends across East and Southern Africa were more mixed. Ethiopia, Kenya, Rwanda, and Tanzania registered increases in national average maize prices over both the six- and twelve-month periods, signalling sustained price pressure. Mozambique, Zambia, and Zimbabwe experienced price increases compared to six months ago, despite year-on-year declines, indicating recent upward momentum. South Sudan was an exception, recording a 10.2% decline in maize prices over the past six months, although prices remained markedly elevated at 34.4% above last year’s levels, reflecting continued structural price pressures.

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

Country	Change (%) in people with insufficient food consumption from last 1 Month	Change (%) in people with insufficient food consumption from last 1 year	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	0.00	0.00	-13.19	-19.64
Ethiopia	0.00	0.00	18.16	35.80
Ghana	0.00	0.00	-35.15	-54.21
Kenya	0.00	0.00	7.38	10.99
Malawi	0.00	0.00	-16.50	-21.55
Mali	0.00	0.00	-10.11	-21.04
Mozambique	0.00	0.00	5.29	-21.14
Niger	0.00	0.00	-9.10	-23.44
Nigeria	0.00	-40.38	-25.52	-42.40
Rwanda	0.00	0.00	1.31	13.84
South Sudan	0.00	0.00	-10.17	34.41
Tanzania	0.00	0.00	20.69	2.94
Togo	0.00	0.00	-15.49	-24.99
Uganda	0.00	0.00	12.98	-25.31
Zambia	0.00	0.00	31.89	-24.01
Zimbabwe	0.00	0.00	3.56	-24.01

Change ↑ Increase ↓ Decrease

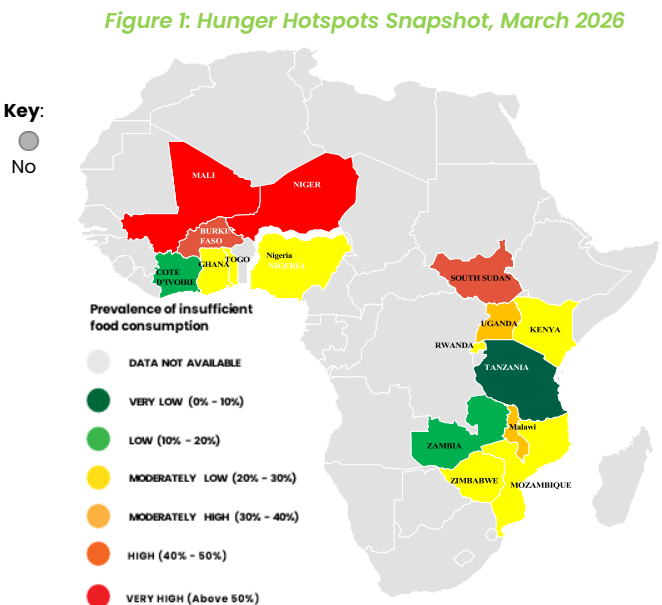
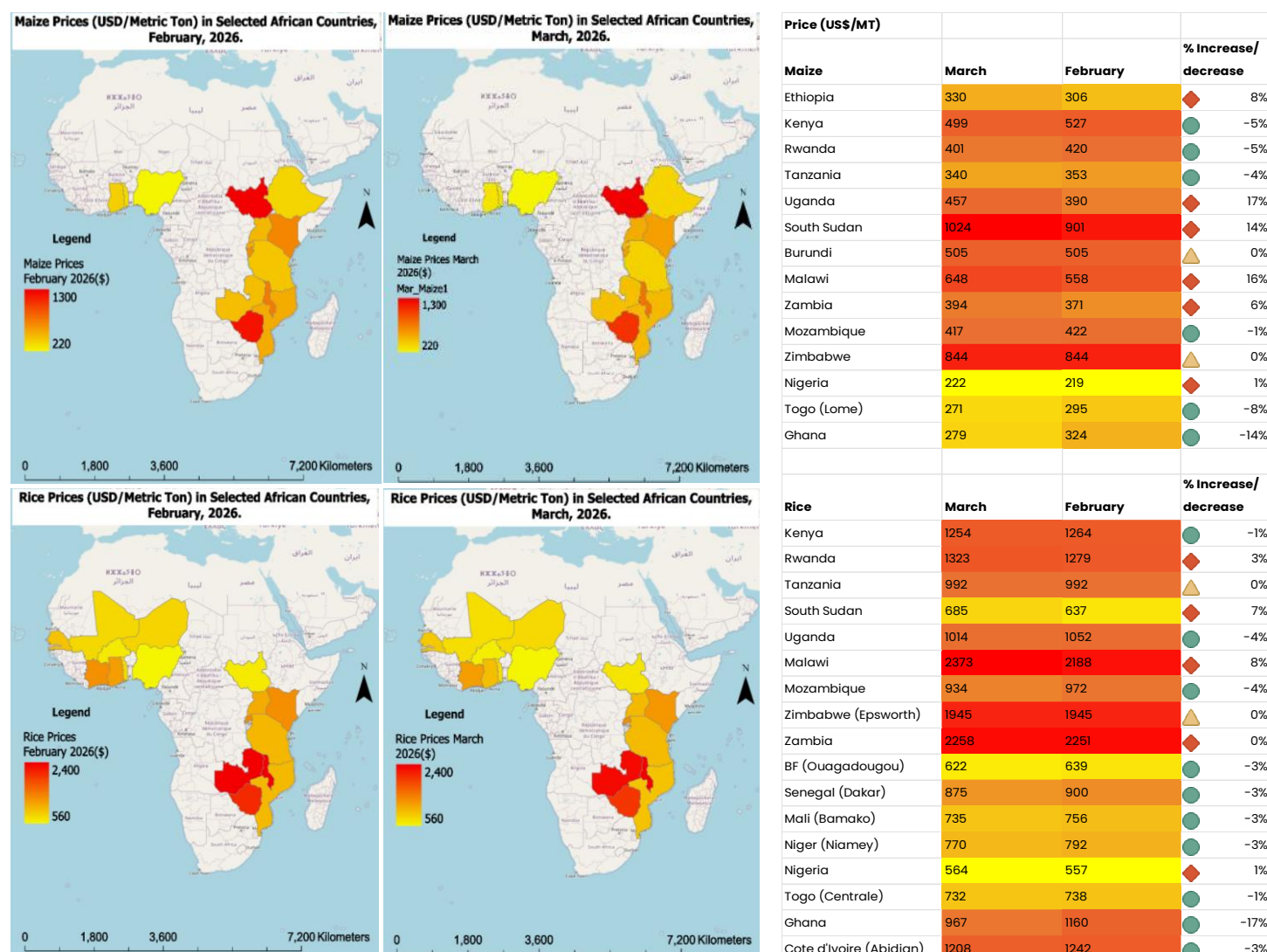


Figure 2 presents maize and rice prices in United States Dollar for February and March 2026, showing notable variations across monitored countries. In March, maize prices were highest in South Sudan at USD 1,024 per metric ton (MT), reflecting a 14 percent increase from February, followed by Zimbabwe (USD 844/MT) and Malawi (USD 648/MT).

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

In contrast, the lowest maize prices were recorded in Nigeria (USD 222/MT), Togo (USD 271/MT), and Ghana (USD 279/MT). For rice, prices were lowest in Nigeria (USD 564/MT), followed by Ouagadougou in Burkina Faso (USD 622/MT) and South Sudan (USD 685/MT). Conversely, the highest rice prices were observed in Malawi (USD 2,373/MT), Zambia (USD 2,258/MT), and Epsworth in Zimbabwe (USD 1,945/MT). Notably, rice prices in Zambia and Zimbabwe declined significantly, by 26% and 14% respectively, compared to their December 2025 levels.

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



Global Market Update

The FAO Food Price Index (FFPI) averaged 128.5 points in March 2026, rising by 2.4% from its revised February level and extending the upward trend for a second consecutive month. This increase is supported by varying increases in all major commodity groups, i.e. cereals (1.5%), meat (1%), dairy (1.2%), vegetable oils (5.1%), and sugar (7.2), and reflects a combination of underlying market dynamics and heightened energy costs associated with the escalating conflict in the Middle East. On a year-on-year basis, the FFPI stood 1% higher than its level in March 2025.

As of 31 March, the International Grains Council (IGC) Grains and Oilseeds Index (GOI) present a mixed outlook across major grains and oilseeds. The GOI stands at 225.16, showing no reported monthly change but a modest 4.29% increase over the year, indicating some firming in broader commodity conditions. Wheat posted a positive monthly gain of 3.23% and a 4.59% annual rise, suggesting relatively strong performance compared with other cereals. In contrast, rice and soyabeans both declined month-on-month by 1.07% and 1.72% respectively, though soyabeans still recorded a notable 9.07% annual increase. Barley showed slight monthly softening at -1.31% but remained up 5.96% year-on-year, making it, alongside soyabeans, one of the few commodities with clear annual increase. Overall, the data reflects a diverging pattern: some commodities showing upward pressure in price while others face continuing downward pressure.

Figure 3: FAO Food Price Index (FFPI)²

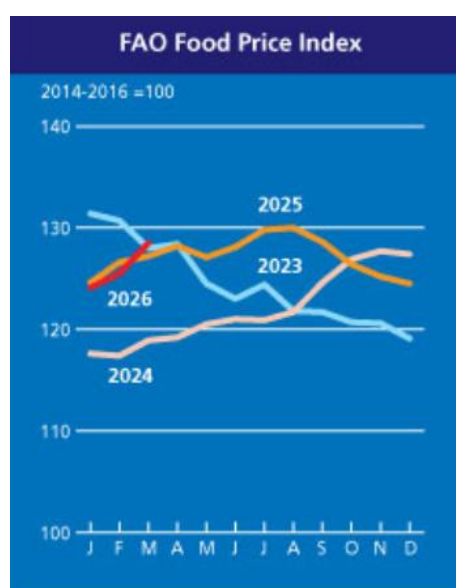


Table 2: IGC GOI Commodity Price Indices³

	Jan 2000 = 100	31-Mar	% Change 1M	% Change 1Y
GOI		225.16	-	4.29
Wheat		209.13	3.23	4.59
Maize		231.10	-	-
Rice		156.72	-1.07	-11.96
Soyabeans		221.31	-1.72	9.07
Barley		244.47	-1.31	5.96

Global Fertiliser Outlook

Global fertilizer markets are under acute stress following disruptions tied to the U.S.–Israel–Iran conflict and related regional shocks: about one-third of global fertilizer trade passes through the Strait of Hormuz and nearly half of traded supply originates in the Persian Gulf, so production halts (e.g., in Qatar), plant outages, export restrictions, and gas shortages have tightened supply and driven sharp price spikes (urea rising roughly from \$490 to \$780/MT in a month).⁴ These simultaneous supply, energy, and logistics shocks mean availability and affordability are contracting at a critical moment in many planting calendars, turning a supply shock into a concrete food-security risk if not addressed promptly.

Africa is especially exposed because many countries depend on imported mineral fertilizers and cannot easily substitute or delay applications during planting; delayed or reduced fertilizer access now will translate to lower yields. IFDC and partners therefore call for immediate, coordinated responses to protect farmer access (prioritizing fertilizer in national responses, regional coordination, safeguarding logistics) while accelerating investment in regional production and input security to reduce future vulnerability.

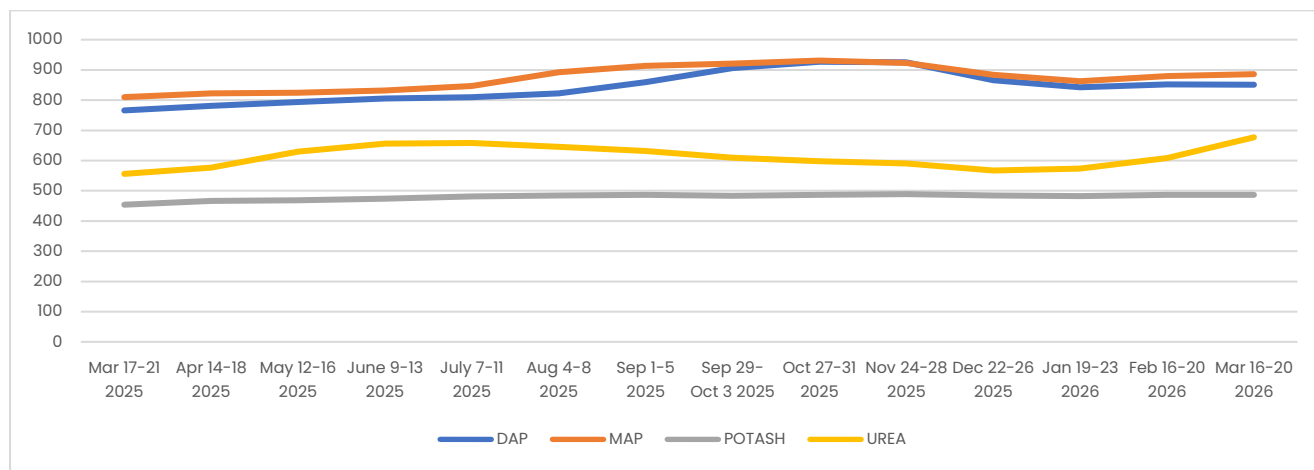
All monitored global fertilizer prices up compared to a year ago, with urea rising the most at 21.8%, followed by DAP (11.1%), MAP (9.4%), and Potash (7.3%). Compared to February, urea and MAP has risen by 11.1% and 0.7%, while DAP declined by 1% and potash remain unchanged.

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

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

⁴ Ifdc.org

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



Source: Author's construction based on DTN ⁵

Implications of the Iran War on Global and African Commodity Markets

The escalation of conflict involving Iran and its spillover across the Gulf has triggered a major systemic shock to global food systems, with Africa among the hardest-hit regions. The effects on African agriculture are transmitted rapidly through globally interconnected supply chains, particularly energy, fertilizer, trade, and logistics networks. The Strait of Hormuz, a critical chokepoint for global oil, LNG, and fertilizer exports, has experienced near-total disruption, causing cascading impacts on commodity prices, transport systems, and food import pathways. This crisis mirrors, and may potentially exceed, the food price shocks of 2022, placing severe pressure on African economies already grappling with high import dependence, climate vulnerability, and constrained fiscal space.

Sharp increases in global oil prices have pushed fuel costs upward across many African countries, raising the price of transportation, logistics, and agricultural production. Producers in South Africa report that diesel shortages are threatening the movement of goods, while Nigeria is experiencing fuel-driven inflation. Similar spikes are evident across East and Southern Africa: Tanzania's fuel prices rose by 12%, Zambia's by 10%, Mozambique's by 13%, and Ethiopia's by 16%. These surges directly raise costs for land preparation, irrigation, processing, and distribution, core activities that underpin agricultural productivity. In contrast, some governments such as Kenya have intervened to reduce fuel prices over the period. For instance, Kenya's Super Petrol prices declined by KSh 4.24, Diesel by KSh 3.93, and Kerosene by KSh 1.00 per litre and remained the same up to the time of publishing this report.⁶

With the Middle East supplying roughly 30% of global nitrogen fertilizers, disruptions to production and shipping have led to tighter fertilizer supplies, steep price increases, and delays. Fertilizer prices have risen by 30–45% in many African markets since the conflict began, with Nigeria and Ghana reporting jumps of nearly 40% and 35% respectively. Shortages and shipment delays are now widespread, from Senegal and Côte d'Ivoire to Malawi, Zambia, and Mozambique, threatening critical planting seasons, especially for smallholder farmers who depend on timely, affordable input access. Without adequate fertilizer, farmers risk reducing application rates, switching to lower-input crops, or missing entire planting windows, with projected yield declines of 12–20% in countries such as Kenya, Nigeria, and Ghana.

Disrupted maritime routes have increased freight costs, insurance premiums, and delivery times, straining both food imports and agricultural exports. Shipping rerouted from the Suez Canal to the Cape of Good Hope adds up to 10 extra days to delivery schedules, inflating costs for cereals, cooking oils, and other essentials. Meanwhile, heightened global competition, especially from large Asian importers, has intensified demand pressures. Asia's dominant share of rice, wheat, and soybean imports enables it to outbid African countries, diverting shipments and raising global prices. As West, East, and Southern Africa continue to rely heavily on imported staples, weakened currencies and higher logistical costs are deepening food inflation and threatening household food access.

Collectively, these pressures converge to undermine agricultural production, trade stability, and food consumption across the continent. Rising input and transport costs are pushing farmers to scale back cultivation, while more expensive and delayed imports are worsening food inflation and widening trade deficits. At the same time, intensifying global competition for limited food and fertilizer supplies is reinforcing structural inequalities, leaving Africa increasingly priced out of essential markets. In this environment, the conflict serves as both an acute emergency and

⁵ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/10/29/anhydrous-8-price-spike-one-month>

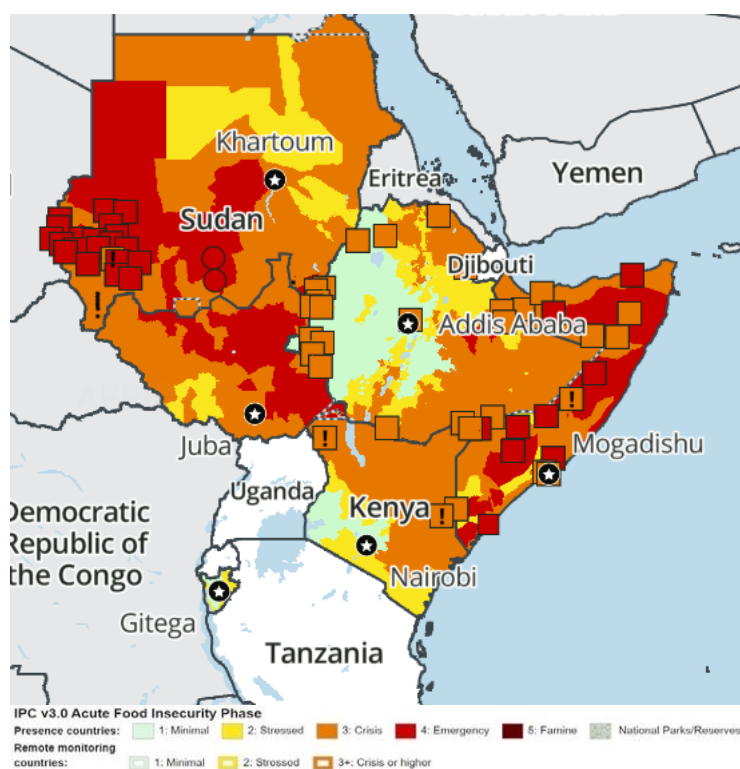
⁶ FINAL SIGNED PRESS RELEASE- FEBRUARY 2026.pdf; PRESS RELEASE 14TH MARCH 2026.pdf; FINAL SIGNED PRESS RELEASE- FEBRUARY 2026.pdf

a long-term stress test for Africa's food systems, highlighting the urgent need for enhanced resilience, coordinated regional responses, and reduced dependence on vulnerable external supply chains.

East Africa Food Insecurity Updates

Food Security Outlook

Figure 5: East African Countries Food Security Outlook, March 2026



Acute food insecurity remains extremely high across East and Central Africa and is projected to deteriorate further in many areas. As of March 2026, an estimated 38 million people in IGAD member states are classified in Crisis or worse (IPC Phase 3+).⁷ This includes 235,000 people facing IPC Phase 5 (Famine/Catastrophe), 9 million in IPC Phase 4 (Emergency), and 28 million in IPC AFI Phase 3 (Crisis). Across Kenya, South Sudan, Tanzania, and Uganda alone, close to 12 million people are expected to face Crisis or worse (IPC Phase 3+), underscoring the severity and scale of the unfolding humanitarian situation.

Food security conditions in **Ethiopia** remain fragile, with Emergency (IPC Phase 4) outcomes persisting in parts of East Hararghe's lowlands but expected to ease to Crisis (IPC Phase 3) from June as the belg harvest improves food access, supported by above-average rainfall forecasts that are enhancing crop development, pasture regeneration, and agricultural labour income.⁸ Crisis (IPC Phase 3)

outcomes remain widespread across the pastoral south and southeast, where poor households face persistent food consumption gaps, rising reliance on unsustainable coping strategies, and elevated malnutrition, despite the onset of generally average gu/genna rains that are expected to bring only gradual improvements. Conflict-affected areas of Tigray, Amhara, and Afar are also likely to remain in Crisis due to ongoing insecurity, market disruptions, delayed belg benefits, and sharply elevated therapeutic feeding admissions, indicating sustained acute malnutrition. Nationally, fuel shortages and transport constraints linked to Middle East conflict are disrupting markets, increasing food prices, and eroding household purchasing power, compounding localized climatic and conflict-related shocks.

Kenyan's food security conditions remain strained, with Crisis (IPC Phase 3) outcomes persisting across pastoral and marginal agricultural areas and some worst-affected households facing Emergency (IPC Phase 4), driven by low livestock herd sizes, limited pasture regeneration despite recent rains, sustained high food prices, and constrained household incomes.⁹ In pastoral areas, below-average livestock productivity, atypically low milk availability, and reduced livestock sales as households prioritize herd recovery during the long rains are limiting purchasing power and sustaining reliance on negative coping strategies. In marginal agricultural areas, depleted food stocks after successive poor seasons and high market dependence continue to restrict food access, although early land preparation and planting for the long rains are providing modest income that remains insufficient to offset large deficits and debts. In refugee settings, Crisis (IPC Phase 3) outcomes persist despite scaled-up WFP assistance, as limited livelihood opportunities and inadequate non-food support compel households to divert food assistance to meet essential needs, undermining consumption. In addition, elevated staple food prices linked to low domestic stocks and compounded by risks from Middle East conflict disrupting trade and increasing input costs continue to erode household food access.

In **South Sudan**, protracted conflict including recent fighting in Jonglei, Upper Nile, and Western Equatoria combined with localized flooding, widespread displacement, returning populations, and worsening macroeconomic conditions,

⁷ East and Central Africa Food Security & Nutrition Working Group report; 26 March 2026

⁸ <https://fews.net/east-africa/ethiopia>

⁹ <https://fews.net/east-africa/kenya>

continues to drive Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes, with some areas facing a potential Risk of Famine (IPC Phase 5).¹⁰ Market disruptions, limited supplies, and damaged infrastructure are severely constraining food access; while flooding and insecurity are impeding humanitarian operations, leaving many households without adequate assistance and increasingly vulnerable.

Food security conditions in **Uganda** remain concerning, with an estimated 1.0–2.49 million people expected to require food assistance, peaking during the April–June lean season, particularly among refugees and poor households in Karamoja, where food stocks are depleted following below-average production.¹¹ Across Karamoja, refugee settlements, and surrounding host communities, the situation is severe, driven by poor harvests, declining humanitarian assistance, and limited livelihood opportunities.¹² As a result, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) conditions persist and are expected to continue into early 2026 without expanded support and strengthened livelihood interventions. Refugees, nearly 2 million people, primarily from South Sudan and the Democratic Republic of Congo, face worsening food access due to limited land and income opportunities, declining humanitarian assistance, and reduced ration levels amid significant funding shortfalls. Staple food prices are near or above five-year averages and are expected to rise further through September due to strong regional demand and higher fuel costs, despite anticipated seasonal harvests. While domestic fuel supplies remain stable for now, global supply disruptions linked to the Middle East conflict are likely to push up transport and import costs, further constraining household purchasing power and complicating humanitarian delivery in the months ahead.

Prevalence of Insufficient Food Consumption

Just as previous month, no changes were recorded in the number of people facing Insufficient Food Consumption (IFC) over the past one month and one year across the five Eastern African countries assessed. However, compared to two years ago, only Kenya and Tanzania recorded no changes. Uganda recorded about 117% increase, while South Sudan and Rwanda recorded 53% and 38% respectively. South Sudan remains the most proportionally affected at 40.2%, followed by Uganda at 35% of its total population. Tanzania remains the least affected proportionately at 7.4%.

Table 3: Prevalence of Insufficient Food Consumption across selected East African countries (March 2026)¹³

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	0.00	0.00
Rwanda	12.30	3.60	3.60	29.27	0.00	0.00	38.46
South Sudan	11.00	4.90	4.90	40.20	0.00	0.00	53.13
Tanzania	56.30	5.20	5.20	7.37	0.00	0.00	0.00
Uganda	42.70	18.00	18.00	35.03	0.00	0.00	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.

¹⁰ East and Central Africa Food Security & Nutrition Working Group report; 26 March 2026

¹¹ <https://fews.net/east-africa/uganda>

¹² East and Central Africa Food Security & Nutrition Working Group report; 26 March 2026

¹³ Author's construction based on WFP HungerMap Live

Maize

Figure 6: National average price spreads for maize across select East African Countries¹⁴

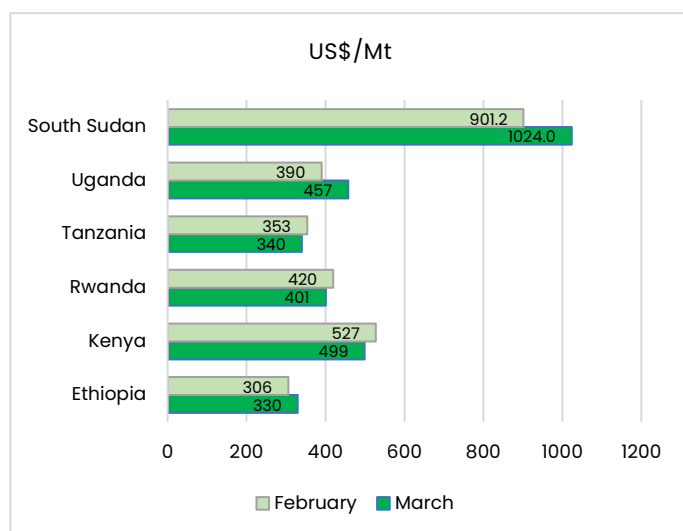


Figure 6 presents maize prices (in USD per metric tonne) across six Eastern African countries, highlighting month-on-month changes between February and March. **South Sudan** remained the highest-priced market in the region, with maize prices increasing sharply from USD 901.2/MT to USD 1,024/MT (approximately +14%), underscoring continued supply constraints and high marketing costs. **Uganda** recorded the second-largest increase, rising from USD 390/MT to USD 457/MT (+17%), reflecting strengthening domestic demand and active regional trade flows.

In contrast, **Kenya** registered a moderate decline in maize prices, falling from USD 527/MT in February to USD 499/MT in March (-5%), potentially linked to improved market arrivals and easing import pressures. Already this year,

Kenya is anticipated to harvest a record 70 million bags of Maize, sending alarms to farmers who were hoarding stocks in anticipation for better prices this year¹⁵. Similar downward trends were observed in **Rwanda**, where prices declined by 5% to USD 401/MT, and **Tanzania**, where prices edged down slightly to USD 340/MT (-4%), suggesting relatively stable supply conditions. **Ethiopia** continued to record the lowest maize prices in the region despite a month-on-month increase from USD 306/MT to USD 330/MT (+8%), which may be associated with currency movements and seasonal marketing dynamics. Overall, the figure underscores significant price disparities across Eastern Africa, with persistent upward pressures in structural deficit markets and relative stability in surplus-producing countries.

Table 4 summarizes maize prices in local currencies across East African countries, demonstrating divergent trends across time horizons. Month on month, sharp increases were recorded in Uganda (+22%), South Sudan (+14%), and Ethiopia (+7.74%), signaling acute supply pressures and tightening market conditions. In contrast, **Kenya** (-4.68%), **Rwanda** (-4.33%), and Tanzania (-2.78%) registered modest declines, pointing to temporary supply easing and improved short-term availability.

Despite these mixed short-term movements, maize prices remain significantly higher on a year-on-year basis across all markets, with especially steep increases in **Ethiopia** (+36%) and **South Sudan** (+34%), underscoring persistent structural and macroeconomic pressures such as currency depreciation, high fuel and transport costs and market disruptions¹⁶. Over the three-month period, prices rose strongly in South Sudan (+42%), **Uganda** (+17%), Ethiopia (+12%), and Tanzania (+9.4%), reflecting sustained supply constraints and firm demand, while Rwanda recorded a notable decline (-8%), suggesting comparatively better recent supply conditions. Over the six-month horizon, maize prices generally trended upward across most markets—particularly in **Tanzania** (+21%) and Ethiopia (+18%)—pointing to gradual inflationary pressure despite short-term easing in some countries. Overall, the table highlights strong spatial and temporal divergence in maize price dynamics, with acute short-term pressure in deficit markets, partial easing in others, and consistently high annual price levels across the region.

Table 4: Percentage changes in maize prices in East Africa¹⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	5,123.81	7.74 ↑	12.36 ↑	18.16 ⓧ	35.80 ⓧ
Kenya	Maize	National Average, Retail, KES/KG	64.48	-4.68 ↘	4.57 ▲	7.38 ↑	10.99 ↑
Rwanda	Maize	National Average, Retail, RWF/Kg	583.05	-4.33 ↘	-7.55 ↓	1.31 ▲	13.84 ↑
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	4,653.06	13.62 ↑	42.30 ⓧ	-10.17 ↓	34.41 ⓧ
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	87,500.00	-2.78 ↘	9.38 ↑	20.69 ⓧ	2.94 ▲
Uganda	Maize	National Average, Retail, UGX/Kg	1,703.39	21.89 ⓧ	16.52 ⓧ	12.98 ↑	

Note: Latest price is for March 2026, * February 2026, and ** January 2026

¹⁴ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁵ See [Maize Prices Kenya 2026 Crash to Below Sh2,200 as Record 70 Million Bag Harvest Sparks Farmer Distress - Farmers Trend Ltd.](#)

¹⁶ [Global Price Watch March 2026](#)

¹⁷ 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

● = 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 Countries¹⁸

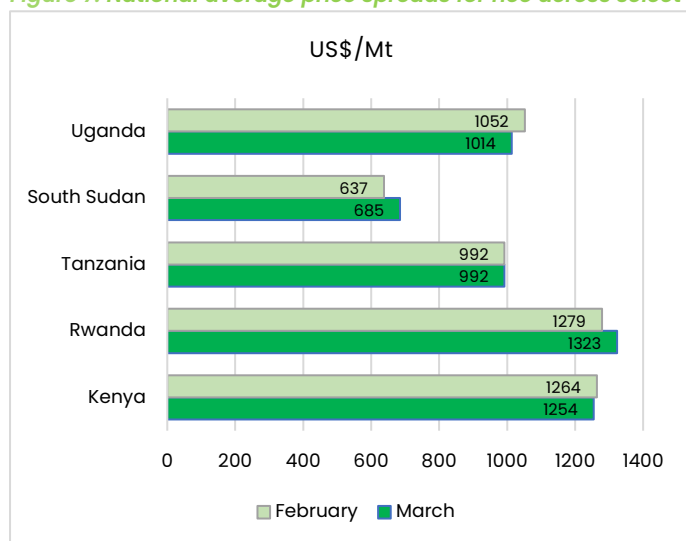


Figure 7 presents rice prices (in USD per metric tonne) across five Eastern African countries, showing month-on-month changes between February and March. Rwanda recorded the highest rice prices in the region, with prices rising from USD 1,279/MT to USD 1,323/MT (+3%), reflecting sustained demand and reliance on imported supplies. Kenya followed closely, with prices edging down slightly by 1% to USD 1,254/MT, suggesting relatively stable import flows and market availability.

Uganda registered a modest decline from USD 1,052/MT to USD 1,014/MT (-4%), indicating improved domestic supply conditions. In contrast, South Sudan experienced a notable month-on-month increase, with rice prices rising from USD 637/MT to USD 685/MT (+8%), pointing to supply constraints and higher transaction costs. Tanzania

recorded stable prices at USD 992/MT across both months, reflecting balanced market conditions and adequate supply.

Table 5 shows mixed short-term movements in local-currency rice prices across East Africa, reflecting varying supply conditions and market structures. Month on month, **South Sudan** recorded the largest increase (+6.90%), followed by Uganda's rice varieties—Kaiso (+2.09%) and Super (+1.20%)—and Rwanda (+1.46%), pointing to emerging short-term supply pressure. In contrast, Kenya and Tanzania registered declines of 3.48% and 0.98%, respectively, reflecting relatively stable availability and easing conditions in those markets.

In **Kenya**, retail prices fell to KES 162.21/kg and remained broadly stable over the three- and six-month periods, with a modest year-on-year increase of 2.36%, suggesting limited inflationary pressure. Rwanda's prices edged up to RWF 1,857.35/kg month on month but continue to face significant medium- and long-term inflation, with prices up 21.38% over six months and 34.70% year on year.

Tanzania's wholesale prices remained elevated relative to historical averages, rising 6.32% over three months, 16.0% over six months, and 18.8% year on year, driven by stock depletion amid strong domestic consumption and sustained regional demand. In **Uganda**, both rice varieties posted moderate monthly increases, with Kaiso recording stronger medium-term gains (+6.38% over three months and +10.14% over six months), pointing to tightening supply conditions or rising domestic and cross-border demand.

Table 5: Percentage changes in rice prices in East Africa¹⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice	National Average, Retail, KES/KG	161.96	-0.16 ▾	-2.82 ▾	-2.13 ▾	1.20 ▲
Rwanda	Rice	National Average, Retail, RWF/Kg	1,925.98	3.69 ▲	7.58 ↑	21.88 ✖	35.97 ✖
South Sudan	Rice	National Average, Retail, SSP/Kg	3,111.43	7.44 ↑	9.81 ↑	-6.37 ▽	15.79 ✖
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	255,000.00	0.99 ▲	6.25 ↑	12.09 ↑	12.09 ↑
Uganda	Rice_kaiso	National Average, Retail, UGX/Kg	3,775.83	0.23 ▲	1.72 ▲	5.41 ↑	
Uganda	Rice_super	National Average, Retail, UGX/Kg	4,718.94	-0.94 ▾	-5.38 ▽	3.77 ▲	

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = no change, ▲ = low increase (0-5%), ↑ = moderate increase (5-15%), ✖ = high increase (>15%),
 ▾ = low decrease (0-5%), ▽ = moderate decrease (5-15%), ▼ = high decrease (>15%)

¹⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

¹⁹ 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

Beans

Figure 8: National average price spreads for beans across select East African Countries²⁰

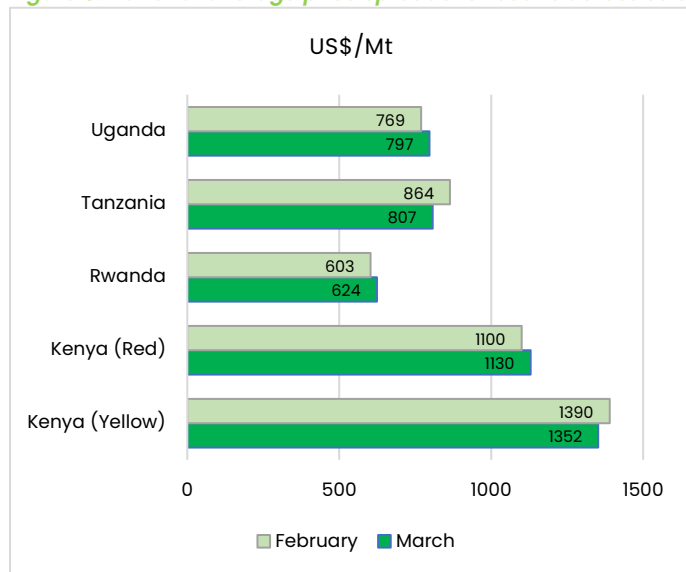


Figure 8 presents beans prices (in USD per metric tonne) across selected Eastern African markets, highlighting month-on-month changes between February and March. Kenya (yellow beans) recorded the highest prices in the region despite a modest decline from USD 1,390/MT to USD 1,352/MT (-3%), reflecting continued strong consumer demand alongside slight improvement in availability. Similarly, **Kenya** (red beans) prices increased from USD 1,100/MT to USD 1,130/MT (+3%), indicating sustained market demand and varietal-specific supply constraints.

Among neighboring markets, **Uganda** experienced a moderate increase in beans prices, rising from USD 769/MT to USD 797/MT (+4%), suggesting firm demand and tightening seasonal supplies. In contrast, **Tanzania** recorded a notable decline from USD 864/MT to USD 807/MT (-7%), pointing to improved supply conditions and

market easing. **Rwanda** saw a moderate price increase from USD 603/MT to USD 624/MT (+3%), though it remained the lowest-priced beans market in the region.

Table 6 illustrates local-currency bean prices across East African markets, reflecting differences in seasonal supply, market structure, and demand. In **Kenya**, retail bean prices averaged KES 178.38/kg for Yellow-Green beans and KES 141.20/kg for Red Haricot beans, with both varieties recording modest month-on-month increases (+1.44% and +2.43%), indicating short-term firming. Over the six-month period, prices rose more strongly (+10.44% and +10.57%, respectively), pointing to medium-term tightening. On a year-on-year basis, however, price trends diverged: Yellow-Green beans declined (-4.93%), while Red Haricot beans edged up slightly (+0.22%), suggesting relatively contained long-term inflation and clear varietal differences. In **Rwanda**, retail bean prices remained broadly unchanged at RWF 875.98/kg on a month-on-month basis, indicating short-term stability. However, medium-term trends show substantial easing, with prices declining by 21.67% over three months and 14.10% over six months. Prices were also 9.85% lower year on year, pointing to improved domestic supply conditions compared to last year.

Tanzania recorded a notable month-on-month decline (-4.35%), with prices falling to TZS 220,000 per 100 kg. This decline is consistent with broader medium-term softening, including a 6.38% drop over three months and a sharp year-on-year decrease (-19.27%), indicative of strengthened domestic availability and reduced market pressure. In **Uganda**, retail bean prices declined by 4.90% month on month to UGX 2,755.13/kg. Prices also fell over the three-month (-9.08%) and six-month (-13.78%) periods, reflecting continued supply recovery following harvest inflows and easing regional demand pressures.

Table 6: Percentage changes in bean prices in East Africa²¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans (Yellow-Green)	National Average, Retail, KES/KG	174.64	-2.10 ▾	-2.90 ▾	6.46 ↑	-4.11 ▾
Kenya	Beans Red Haricot (Wairimu)	National Average, Retail, KES/KG	145.85	3.29 ▲	2.06 ▲	11.96 ↑	0.65 ▲
Rwanda	Beans	National Average, Retail, RWF/Kg	907.75	3.63 ▲	-14.03 ▾	-13.77 ▾	-8.55 ▾
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	207,500.00	-5.68 ▾	-8.79 ▾	-9.78 ▾	-23.85 ▾
Uganda	Beans	National Average, Retail, UGX/Kg	2,969.70	7.79 ↑	1.96 ▲	-2.39 ▾	

Note: Latest price is for March 2026, * February 2026, and ** January 2026

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

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

²¹ Author's construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

Wheat

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

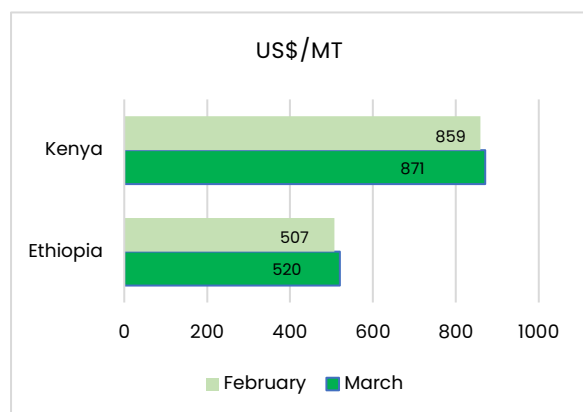


Figure 9 presents wheat prices (in USD per metric tonne) across Kenya and Ethiopia, highlighting month-on-month changes between February and March. **Kenya** recorded the highest wheat prices in the comparison, with prices increasing marginally from USD 859/MT to USD 871/MT (+1%), reflecting continued reliance on imports and firm domestic demand amid elevated international wheat prices.

Similarly, **Ethiopia** experienced a modest month-on-month increase, with wheat prices rising from USD 507/MT to USD 520/MT (+3%). This upward movement is likely linked to currency pressures and seasonal market dynamics rather than acute supply shortages. Overall, the figure indicates sustained upward pressure

on wheat prices in both markets, underscoring the influence of import dependence and macroeconomic factors on domestic wheat markets in the region.

Table 7 summarises wheat prices in local currencies across two select East African countries, showing a clear upward bias, particularly in import-dependent Kenya, while movements in Ethiopia remain more moderate. **Ethiopia** recorded a modest month-on-month increase (+3%), reflecting firm demand and inflationary pressures. Prices also rose on a three-month basis (+3%) but showed slight decrease over six months (-1%), suggesting some recent stability. Nevertheless, year-on-year prices remained higher (+5%), indicating underlying structural inflation. **Kenya**, by contrast, experienced continued price firming across most horizons. Wheat prices increased by 2% month-on-month and rose sharply over the three-month (+13%) and six-month (+13%) periods, reflecting sustained upward pressure linked to import dependence, exchange-rate exposure, and tighter market conditions. On a year-on-year basis, prices were significantly higher (+20%), underscoring Kenya's greater sensitivity to global wheat markets.

Table 7: Percentage changes in wheat prices in East Africa²²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,083.33	2.73 ▲	2.68 ▲	-0.54 ▾	4.57 ▲
Kenya	Wheat	National Average, Retail, KES/KG	112.46	2.00 ▲	13.24 ▲	12.95 ▲	20.03 ✖

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 summarizes fertilizer prices across Kenya, Rwanda, and Uganda, showing divergent and highly uneven trends across countries and fertilizer types. Relative to one month ago, prices in Kenya and Rwanda are broadly stable to slightly lower (about -0.5% to -2%), while Uganda records sharp increases (DAP +31%, NPK +46%). Compared to three months ago, Kenya shows moderate increases in DAP and CAN (+4-6%) but a steep decline in NPK (-32%), Rwanda posts modest rises (+1-2%), and Uganda experiences extreme escalation (DAP +113%, NPK +48%). Against six months ago, Rwanda shows strong fertilizer inflation (+16-18%), Kenya remains stable to declining (NPK -12%), and Uganda remains volatile with DAP still very high (+111%) but NPK correcting downward (-27%). Year-on-year, current prices are substantially lower in Kenya (-5% to -29%), significantly higher in Rwanda (+25%), and highly unstable in Uganda, highlighting severe market stress there compared to relative normalization in Kenya and sustained cost pressure in Rwanda.

²² Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Table 8: Percentage changes in fertiliser prices in East Africa²³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Fertilizer (CAN)	National Average, Retail, KES/KG	66.85	-0.47 ↘	4.22 ▲	-1.01 ↘	-28.68 ↓
Kenya	Fertilizer (DAP)	National Average, Retail, KES/KG	117.96	-1.53 ↘	5.57 ↑	-0.03 ↘	-5.37 ↓
Kenya	Fertilizer (NPK)	National Average, Retail, KES/KG	88.07	-1.79 ↘	-31.81 ↓	-12.46 ↓	-16.33 ↓
Rwanda	NPK	National Average USD/50kg	924.59	-1.18 ↘	2.03 ▲	15.97 ✖	24.71 ✖
Rwanda	Urea	National Average USD/50kg	929.88	-0.01 ↘	0.84 ▲	17.51 ✖	25.52 ✖
Uganda	DAP	National Average, Retail, UGX/Kg	7,866.67	30.89 ✖	112.82 ✖	111.29 ✖	
Uganda	NPK	National Average, Retail, UGX/Kg	5,325.27	46.04 ✖	48.42 ✖	-26.74 ↓	

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 Conditions²⁴

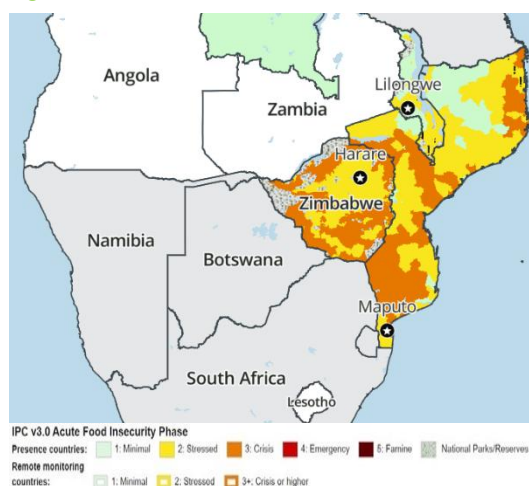
Planting of Belg and main-season cereals across **Eastern Africa** is progressing well, supported by recently improved rainfall that has eased earlier dryness, with forecasts of average to above-average rains through June benefiting crop development. In **Ethiopia**, Belg planting is underway with improved moisture, though localized flooding, landslides, and insecurity in Amhara are disrupting activities, and concerns remain about potential El Niño impacts on the upcoming Meher season. Across **Uganda, Rwanda, Burundi**, and **Kenya**, early and timely rains—some arriving ahead of schedule—have broadly supported planting of cereals and rice, despite isolated flood damage in parts of Ethiopia and Kenya’s Rift Valley. Production outcomes from recent short-rains seasons are mixed, with Kenya expecting poor maize harvests in eastern and central areas due to earlier dryness, contrasted by better prospects in western regions. In **Tanzania** development of *Masika* crops in bimodal northern areas has improved with recent rains, while erratic rainfall earlier in the season negatively affected *Msimu* crops in central and southern unimodal zones, though rainfall recovery in March and forecasts of abundant rains through April are expected to partially mitigate earlier losses. Overall, cropping conditions are broadly favorable, but risks from flooding, landslides, rainfall variability, and localized conflict continue to pose challenges in parts of the region.

²³ Author’s construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

²⁴ Crop Monitor No. 113 – March 2026: [EarlyWarning_CropMonitor_202603.pdf](#)

Southern Africa Food Security Update

Figure 10: Southern Africa Countries Food Security Outlook, March 2026



Food security conditions in **Malawi** have improved markedly compared to last year, with Minimal (IPC Phase 1) outcomes prevailing across much of the central and northern regions.²⁵ These improvements are supported by relatively typical livelihood activities, increased availability of grain imports from Zambia, and ongoing humanitarian assistance, which together are helping to mitigate food consumption gaps among a substantial proportion of poor households. Nonetheless, Stressed (IPC Phase 2) outcomes persist in parts of the southern and central regions where below-average purchasing power and high market dependence continue to constrain food access.

Food access is expected to improve seasonally from April with the 2026 main harvest anticipated to be near average at the national level despite localized flood- and dry spell-related losses boosting access to own-produced foods, crop sales, and agricultural labour, particularly as

green harvests are already underway in the south. However, recovery in flood-affected areas has been slower than expected due to successive shocks, constrained income-earning opportunities, and persistently high maize prices, which, despite recent stability and being well below last year's levels, remain substantially above the five-year average and continue to erode purchasing power. Looking ahead, elevated fuel and input costs linked to global market pressures may pose additional risks to livelihoods and agricultural production, underscoring continued vulnerability among poor households despite seasonal improvements.

In **Mozambique**, Crisis (IPC Phase 3) outcomes will persist through much of 2026 in flood-, drought-, and conflict-affected areas, particularly in the south, central regions, and insurgency-affected Cabo Delgado and northern Nampula.²⁶ Repeated climatic shocks during the 2025/26 season, i.e. severe floods, prolonged dry spells, and cyclones, have caused extensive crop and livestock losses, slowed recovery, reduced household food stocks and incomes, and increased reliance on markets amid persistently high staple food prices, especially in the south. Although the main harvest beginning in April–May is expected to provide only modest and temporary relief, many poor households will continue to face constrained food access and rely on coping strategies, while recovery is hindered by limited inputs, degraded soils, and weak income opportunities. Conditions are expected to remain most severe through the June–September period in the hardest-hit and conflict-affected districts, while more favourable outcomes (Stressed or Minimal) are likely in parts of the center and north where harvests are better. Rising global fuel and input costs linked to Middle East conflict pose additional, though gradual, risks to food prices, transport costs, and access to agricultural inputs later in the year.

Food security conditions in **Zimbabwe** remain strained following the peak of the 2025/26 lean season, with Crisis (IPC Phase 3) outcomes persisting in deficit-producing areas across the south, east, west, and extreme north due to depleted food stocks, high market prices, and below-average incomes, while surplus-producing areas remain Stressed (IPC Phase 2).²⁷ Although green harvests and the revival of some crops after March rains have marginally improved dietary diversity, weather shocks including earlier dry spells and subsequent excessive rainfall have reduced yield potential in several areas and disrupted transport. Near-average harvests expected in April/May are likely to drive gradual improvements, with many deficit areas shifting to Stressed (IPC Phase 2) and surplus areas to Minimal (IPC Phase 1), though below-average harvests in some zones will result in earlier market dependence. Income prospects from the tobacco marketing season are providing some relief, but prices remain significantly lower than last year, limiting gains. At the same time, rising fuel prices linked to global supply disruptions from the Middle East conflict are driving higher transport, production, and food costs, contributing to renewed inflationary pressures and further eroding purchasing power, particularly for low-income households, while also posing risks to future agricultural production through higher fertilizer prices.

Prevalence of Insufficient Food Consumption

As of 30th March 2026, the number of people experiencing Insufficient Food Consumption (IFC) across the four Southern African countries remains unchanged compared to one month and one year ago. With the exception of Zimbabwe, IFC levels are also unchanged from two years prior. Zimbabwe is the only country showing improvement,

²⁵ <https://fews.net/southern-africa/malawi>

²⁶ <https://fews.net/southern-africa/mozambique>

²⁷ <https://fews.net/southern-africa/zimbabwe>

with its current IFC level 18.2% lower than it was two years ago.

Despite this progress, Malawi continues to face the most severe food insecurity, with 30.6% of its population, about 6.8 million people, affected. Mozambique and Zimbabwe follow, with 21.3% (7.6 million people) and 26.6% (4.5 million people) of their populations affected, respectively. Zambia remains the least affected, with IFC impacting just 15.1% of its population, or roughly 3.3 million people. These trends underscore Malawi's ongoing vulnerability, Zimbabwe's partial recovery, Mozambique's recent challenges, and Zambia's relative resilience, reflecting a region marked by varied yet interconnected food security pressures.

Table 9: Prevalence of insufficient food consumption in selected Southern African Countries (March 2026)²⁸

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	0.00	0.00
Mozambique	29.50	7.60	7.60	21.33	0.00	0.00	0.00
Zambia	17.40	3.30	3.30	15.06	0.00	0.00	0.00
Zimbabwe	15.20	4.50	4.50	26.55	0.00	0.00	-18.18

*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 Countries²⁹

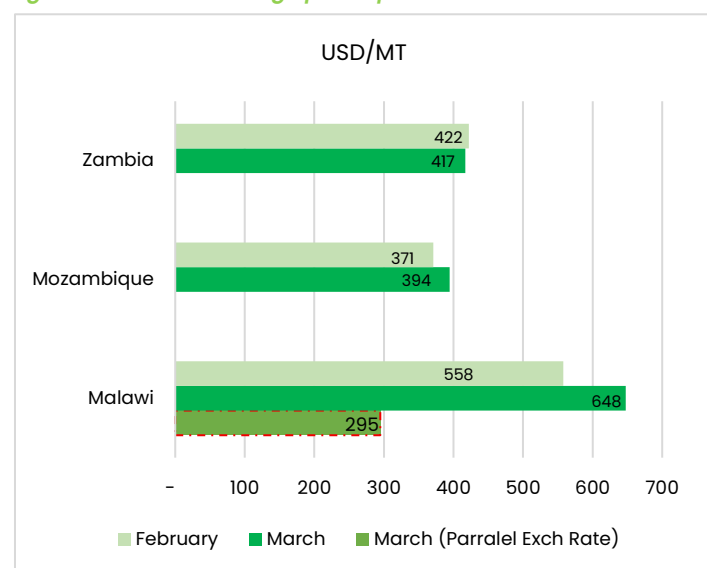


Figure 11 illustrates maize price movements (in USD per metric tonne) across Zambia, Mozambique, and Malawi, highlighting month-on-month changes between February and March. **Zambia** recorded a marginal price decline, with maize prices easing slightly from USD 422/MT in February to USD 417/MT in March (-1%), suggesting relatively stable supply conditions supported by ongoing market inflows.

In contrast, **Mozambique** experienced a notable price increase, with maize prices rising from USD 371/MT to USD 394/MT (+6%). This upward movement points to emerging supply pressures, potentially linked to delayed local availability and increased cross-border demand. **Malawi** displayed the widest divergence in price signals. Based on the official exchange rate, maize prices increased sharply from USD 558/MT in February to USD

648/MT in March (+16%), reflecting constrained domestic supplies and continued reliance on imports. However, when valued using the parallel exchange rate, March prices fall to USD 295/MT, positioning Malawi as the lowest-priced

²⁸ Author's construction based on WFP HungerMap Live

²⁹ These price spreads are calculated based on online rates at: <https://www.oanda.com/currency-converter/en>

market in the comparison and underscoring the significant role of exchange rate distortions in shaping observed price dynamics.

Table 10 summarises maize price trends across selected Southern African markets, displaying highly divergent short- and medium-term movements driven by differences in harvest timing, trade policies, currency conditions, and localized supply constraints. **Malawi** recorded a sharp month-on-month increase (+16%), reflecting tight market conditions linked to production shortfalls, delayed informal imports, and elevated transport and marketing costs. However, relative to three months ago, prices declined (-12%), indicating some easing following post-harvest inflows and improved availability. This downward adjustment persisted over the six-month period (-17%), confirming a correction from earlier peaks. On a year-on-year basis, prices were lower (-22%), largely due to strong base effects from last year's exceptionally high levels.

In **Mozambique**, maize prices also increased in the short term (+6% month-on-month), pointing to emerging supply pressure and higher transaction costs. However, prices declined markedly over the three-month period (-11%), suggesting improved availability supported by seasonal inflows and trade. Over six months, prices recorded a modest increase (+5%), indicating gradual market normalization rather than acute tightening. On an annual basis, prices were significantly lower (-21%), reflecting improved supply conditions compared to last year.

Zambia displayed a contrasting pattern, with prices remaining broadly stable in the short term, supported by relatively better national availability and ongoing market interventions. However, compared to three months ago, prices rose sharply (+14%), signaling tightening conditions linked to stock drawdowns and increasing demand from deficit areas. This upward trend intensified over the six-month horizon (+32%), marking the strongest medium-term increase among the monitored markets. Despite these increases, prices were lower on a year-on-year basis (-25%), again reflecting base effects and improved regional supply compared to last year.

Finally in **Zimbabwe**, maize meal prices showed pronounced intra-country variation. In the short term, prices increased sharply in Gweru (+9%), likely reflecting localized supply bottlenecks and distribution challenges, while prices declined in Bulawayo, Masvingo, and Mutare, pointing to relatively adequate stocks and cross-border inflows. Over the three-month period, prices rose strongly in Gweru (+17%), while other markets continued to register declines, underscoring uneven market conditions. Against six months ago, several markets recorded easing prices, reflecting improved supply flows and correction from earlier highs. On a year-on-year basis, maize prices were substantially lower across all markets (-22% to -36%), driven by strong base effects and partial market stabilization despite recent volatility.

Table 10: Percentage changes in maize prices in Southern Africa³⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	1,120.07	16.24	-12.00	-16.50	-21.55
Mozambique	Maize (white)	National Average, MZN/Kg	24.93	6.38	-11.14	5.29	-21.14
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	7.89	-0.39	13.66	31.89	-25.31
Zimbabwe	Maize meal	Bulawayo, Retail, USD/Kg	0.80	-1.95	-9.06	1.01	-22.04
Zimbabwe	Maize meal	Epworth, Retail, USD/Kg	1.01	1.71	3.58	4.54	-5.33
Zimbabwe	Maize meal	Gweru, Retail, USD/Kg	0.88	9.10	17.29	11.46	-22.63
Zimbabwe	Maize meal	Masvingo, Retail, USD/Kg	0.77	-2.29	-7.57	-3.27	-32.25
Zimbabwe	Maize meal	Mutare, Retail, USD/Kg	0.76	-2.56	-9.18	3.96	-35.97
Zimbabwe	Maize meal	National Average, USD/kg*	0.84	0.86	-1.31	3.56	-24.01

Note: Latest price is for March 2026, * February 2026, and ** January 2026

= 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

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

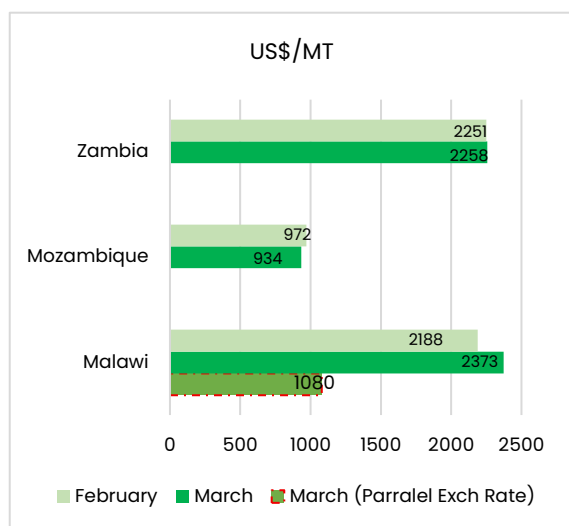


Figure 12 illustrates rice price movements (in USD per metric tonne) across Zambia, Mozambique, and Malawi, highlighting month-on-month changes between February and March. **Zambia** recorded a marginal month-on-month increase, with rice prices edging up from USD 2,251/MT in February to USD 2,258/MT in March (+0.3%), indicating broadly stable market conditions and steady supply.

In contrast, **Mozambique** experienced a moderate price decline, with rice prices falling from USD 972/MT to USD 934/MT (-4%). This downward movement suggests easing market pressure, likely supported by improved availability and sustained import inflows.

Malawi once again exhibited the widest divergence in price signals. Based on the official exchange rate, rice prices increased from USD 2,188/MT in February to USD 2,373/MT in March (+8%), reflecting constrained domestic availability and high dependence on imports.

However, when assessed using the parallel exchange rate, March prices fall sharply to USD 1,080/MT, highlighting the substantial influence of exchange rate distortions on observed price levels and reinforcing the uncertainty faced by market participants.

As illustrated in **Table 11**, rice prices in local currency terms showing mixed short-term movements and largely easing trends over the medium term, with notable country-specific differences. **Malawi** recorded a moderate month-on-month increase (+8.61%), indicating short-term supply pressure or seasonal demand effects. However, prices declined over the three-month period (-9.87%), suggesting easing market conditions following earlier peaks. In contrast, prices rose sharply over the six-month horizon (+15.06%), highlighting sustained upward pressure over the medium term. On a year-on-year basis, prices were broadly stable (+0.67%), indicating that recent volatility has not yet translated into significant annual inflation. **Mozambique** posted a month-on-month decline (-3.91%), pointing to easing conditions in imported rice markets. This downward trend intensified over the three-month period (-21.76%), reflecting improved availability and stronger import inflows. Prices also remained lower over six months (-4.75%) and declined markedly on a year-on-year basis (-15.59%), confirming broad and sustained easing relative to last year's levels.

Zambia registered a mild month-on-month increase (+1.04%), along with a modest three-month rise (+3.29%), suggesting short-term firming in locally produced rice markets. However, prices edged down slightly over six months (-1.04%) and were broadly stable on a year-on-year basis (-0.49%), pointing to a relatively balanced market with limited long-term inflationary pressure. **Zimbabwe**, by comparison, recorded a small month-on-month increase (+1.57%), while prices declined over the three-month (-7.60%) and six-month (-12.98%) periods, indicating sustained easing in the medium term. On a year-on-year basis, prices were marginally higher (+1.83%), suggesting emerging short-term firming but overall stable market conditions in USD-denominated terms.

Table 11: Percentage changes in rice prices in Southern Africa³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	4,103.79	8.61 ↑	-9.87 ↓	15.06 ×	0.67 ▲
Mozambique	Rice (imported)	National Average, MZN/Kg	59.00	-3.91 ▮	-21.76 ↓	-4.75 ▮	-15.59 ↓
Zambia	Rice (Local)	National Average, Retail, Kwacha/KG	42.71	1.04 ▲	3.29 ▲	-1.04 ▮	-0.49 ▮
Zimbabwe	Rice	Epworth, Retail, USD/Kg	1.95	1.57 ▲	-7.60 ↓	-12.98 ↓	1.83 ▲

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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

³¹ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

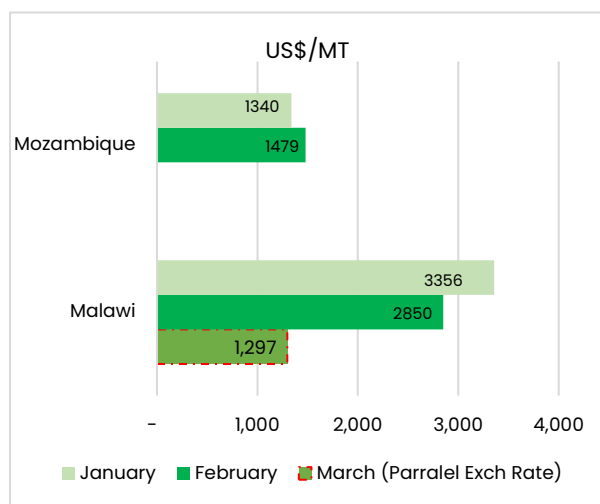


Figure 13 illustrates national average bean price trends for Mozambique and Malawi, highlighting changes between January and February. **Mozambique** recorded a month-on-month increase in beans prices, rising from USD 1,340/MT in January to USD 1,479/MT in February (+10%). This upward trend reflects tightening seasonal supplies and sustained domestic demand.

Malawi exhibited pronounced volatility in beans prices. Based on the official exchange rate, prices declined from USD 3,356/MT in January to USD 2,850/MT in February (-15%), suggesting improved availability following harvest inflows and market adjustments. However, when prices are assessed using the parallel exchange rate, March beans prices fall sharply to USD 1,297/MT, positioning Malawi well below its official price levels and underscoring the

significant role of exchange rate distortions in shaping observed market prices. Overall, the figure highlights stark cross-country differences and the strong influence of macroeconomic factors on beans price formation, particularly in Malawi.

Table 12 summarises bean price movements across Malawi, Mozambique and Zimbabwe displaying contrasting dynamics between countries, reflecting differences in supply conditions and market balance. In **Malawi**, bean prices exhibited a consistent downward trajectory across all time horizons. Prices fell sharply in the short term (-15% month-on-month), signalling strong easing, likely driven by harvest inflows and improved market availability. This decline deepened over the three-month period (-27%), pointing to sustained supply surpluses and pronounced market easing. Over the six-month horizon, prices continued to decline (-19%), reinforcing the presence of excess supply or subdued demand. On a year-on-year basis, prices were also lower (-14%), confirming generally softer market conditions compared to last year.

In contrast, **Mozambique** recorded a mixed but largely inflationary pattern in the short to medium term. Bean prices increased notably in the short term (+10% month-on-month), reflecting emerging supply pressure or strengthening demand. This upward momentum persisted over three months (+8%), suggesting delayed supply response. Over the six-month period, Mozambique stood out with a substantial price increase (+33%), indicating persistent supply constraints and strong demand pressures. However, despite these increases, prices declined on a year-on-year basis (-16%), pointing to softer conditions relative to last year's levels.

Zimbabwe displayed relatively stable but firm price dynamics. Prices rose modestly in the short term (+2% month-on-month) and continued to increase over the three-month period (+4%), indicating moderate tightening. Over the six-month horizon, prices increased further (+5%), reflecting gradual upward pressure within a relatively balanced market. On an annual basis, prices recorded a marginal increase (+2% year-on-year), underscoring overall stability with mild inflation.

Table 12: Percentage changes in beans prices in Southern Africa³²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	4,927.27	-14.98 ↓	-27.03 ↓	-18.78 ↓	-14.40 ↓
Mozambique	Beans	National Average, MZN/Kg	93.47	10.34 ↑	8.05 ↑	33.28 ×	-16.43 ↓
Zimbabwe	Beans	Epworth, Retail, USD/Kg	3.12	1.96 ▲	4.00 ▲	4.70 ▲	1.96 ▲

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 summarises NPK and Urea price movements across Malawi and Mozambique, showing sharp contrasts between the countries and fertilizer types, reflecting differing import exposure, currency effects, and market adjustments. In the short term (1-month), prices declined across all products in Malawi (-2% to -9%), indicating easing

³² Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

retail pressure, while Mozambique recorded a very steep drop in NPK prices (-53%), suggesting a significant price adjustment, possibly linked to improved import availability or price normalization. Urea prices in Mozambique declined more modestly (-4%).

Over the 3-month period, movements were mixed. Malawi's NPK and urea prices rose slightly (+2%), pointing to tentative recovery after earlier declines. In contrast, Mozambique continued to record declines in both NPK (-6%) and urea (-3%), reinforcing evidence of sustained easing in fertilizer markets. Looking at the 6-month horizon, fertilizer prices fell further in Malawi (-12% to -15%), suggesting improved affordability relative to earlier peaks. Mozambique showed divergent signals, with NPK largely stable (-2%) but urea increasing (+11%), indicating product-specific supply pressures.

On a year-on-year basis, trends diverged sharply. Malawi experienced very strong fertilizer inflation, with prices rising by 34–37%, highlighting persistent structural and macroeconomic pressures despite recent declines. By contrast, Mozambique recorded moderate annual increases (around +11%), suggesting relative stabilization compared to Malawi. It is worth noting that, Fertilizer markets are now shaped by compounded geopolitical risk: a structurally tighter market after the Russia–Ukraine war, combined with fresh energy and shipping disruptions linked to Iran.

Table 13: Percentage changes in fertiliser prices in Southern Africa³³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	NPK	National Average, MWK/Kg	3,400.79	-9.29 ↓	2.46 ▲	-15.19 ↓	36.76 ×
Malawi	Urea	National Average, MWK/Kg	3,369.44	-1.83 ▾	2.21 ▲	-12.10 ↓	34.36 ×
Mozambique	NPK	National Average, MZN/Kg	69.87	-52.70 ↓	-6.45 ↓	-1.89 ▾	10.90 ↑
Mozambique	Urea	National Average, MZN/Kg	69.93	-4.31 ▾	-2.66 ▾	11.05 ↑	11.00 ↑

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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

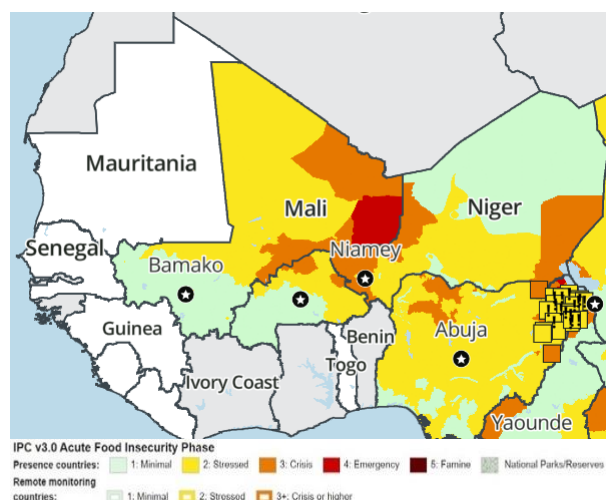
Harvesting of main-season cereals in **Southern Africa** is commencing or imminent, supported by generally average to above-average seasonal rainfall, with crops reaching maturity or late vegetative stages. Mid-March rainfall improved conditions, particularly in **Zimbabwe**, though earlier moisture deficits continue to affect parts of north-western Angola, Zimbabwe, and Madagascar. Heavy rains and tropical cyclones since December, especially in Mozambique and Madagascar, caused localized flooding, crop damage, and infrastructure losses. Regional harvest prospects for 2026 remain broadly favorable, with a second consecutive above-average cereal output expected despite the mixed weather shocks.

Nonetheless, localized shocks remain a significant risk to food security across Southern Africa. Flooding has washed away more than 29,300 hectares of crops in **Zambia** and damaged crops in parts of **Malawi** and Zimbabwe, while Mozambique has suffered substantial losses of farmland and livestock following intense rainfall and flooding, particularly in its southern and central provinces. Although these severely affected areas contribute a relatively small share of national cereal output, household income losses—especially from cash crops—combined with ongoing conflict-related disruptions in **Mozambique's** Cabo Delgado region, are likely to exacerbate food security challenges in localized hotspots despite generally favourable regional production prospects.

³³ Author's construction based on 1) AfricaFertiliser.org for Ethiopia & Rwanda, 2) National MIS for Kenya

West Africa Food Security Update

Figure 14: West African Countries Food Security Outlook, March 2026



In **Burkina Faso**, food security conditions remain fragile, with Crisis! (IPC Phase 3!) outcomes persisting in Karo Peli province through May, as the absence of own-produced food stocks, limited vegetable availability, and low incomes constrain market access, while humanitarian assistance covering at least half of food needs is preventing more severe consumption gaps; without continued assistance, households would likely deteriorate to Emergency (IPC Phase 4) during the June–September lean period. Stressed (IPC Phase 2) outcomes prevail in Djelgodji and Yagha provinces between March and May, supported by food assistance, market supplies, and income from gardening and small-scale activities, though high prices and marginal stocks continue to limit adequate food access, with conditions expected to worsen to Crisis (IPC Phase 3) later in the lean season as vegetable availability declines and reliance on

wild foods increases. Nationally, cereal markets are relatively well supplied and average prices remain below last year average, but insecurity-related supply constraints and high transport costs are driving localized price spikes, particularly in northern markets. Meanwhile, above-average vegetable harvests, especially onions and tomatoes, are supporting producer incomes, though gains remain insufficient to offset cereal needs for vulnerable households.

Food security conditions in **Mali** remain severely constrained, particularly in conflict-affected central and northern regions, where Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes are expected to persist through at least September 2026 due to very high food prices, reduced household incomes, and ongoing insecurity that disrupts markets, livelihoods, and population mobility.³⁴ A deterioration to Emergency (IPC Phase 4) is anticipated from April 2026 in Ménaka, driven by a sharp erosion of livelihoods, large food consumption gaps, and high levels of displacement amid intensified attacks by armed groups. Although national cereal availability is generally near average and staple prices remain near or below the five-year average in more secure agricultural zones, supply disruptions and insecurity in the center and north are keeping prices atypically high and limiting food access for poor households in those areas. The number of people in need of food assistance is expected to peak between August and September 2026 at 2–2.49 million, with needs elevated above seasonal norms due to the combined effects of conflict, fuel and electricity constraints, and declining incomes.

In **Niger**, Crisis (IPC Phase 3) outcomes persist in conflict-affected regions of Tillabéry, Diffa, and northwestern Tahoua due to insecurity, flooding impacts, rising food prices, and deteriorating livelihoods, with food needs expected to peak during the July–September 2026 lean season as household stocks are depleted and market reliance increases.³⁵ Displaced people and very poor host households are the most affected, while smaller populations face Emergency (IPC Phase 4) conditions following flood-related crop and asset losses compounded by food inflation. Escalating insecurity, marked by rising attacks, widespread displacement, disrupted transhumance, and reduced market and livelihood access, remains the primary driver of acute food insecurity, placing additional pressure on host communities and undermining both pastoral and agricultural productivity. Economic conditions further constrain food access, as limited employment opportunities in insecure areas reduce purchasing power and localized food prices remain significantly above national averages despite an overall decline in inflation. While off-season irrigated crop production is supporting limited food availability and income through agricultural labour, insecurity has reduced cultivated areas and labour demand, keeping wages below average. Meanwhile, global spillover effects from the Middle East conflict are expected to raise fuel, transport, and input costs, posing additional risks to food access and livelihoods.

Food security conditions in **Nigeria** remain severely constrained, with Crisis (IPC Phase 3) outcomes widespread across conflict-affected areas and pockets of Emergency (IPC Phase 4) in highly inaccessible zones of the North East, driven by intensified insurgent attacks, displacement, market disruptions, and sharply rising essential commodity costs. Ongoing violence in Borno and Yobe States is disrupting land preparation, trade routes, and market functioning at the onset of the main agricultural season, while restricted mobility continues to limit livelihood and food access. In

³⁴ <https://fews.net/west-africa/mali>

³⁵ <https://fews.net/west-africa/niger>

the North West and North Central regions, deteriorating security marked by banditry, kidnappings, farmer–herder clashes, and attacks on transport corridors is eroding coping capacity and is expected to push Stressed (IPC Phase 2) areas into Crisis during the June–September lean season by constraining agricultural activities and income generation. Although macroeconomic indicators have improved, including stronger external reserves, greater exchange rate stability, and easing headline inflation, persistently high food, energy, and transportation costs—exacerbated by global price pressures linked to the Middle East conflict—continue to undermine household purchasing power and prevent these gains from translating into improved food security for most Nigerians.

Prevalence of Insufficient Food Consumption

Across the monitored West African countries (Table 14), Nigeria is the only one to record a decline in the number of people facing Insufficient Food Consumption (IFC), with a 40.4% reduction over both the past month and past year. Despite this improvement, Nigeria still has the largest absolute caseload, with 56.4 million people affected. In proportional terms, however, Niger and Mali remain the most impacted, with 76.6% and 52.4% of their populations facing IFC, followed by Burkina Faso at 46.5%.

Looking back two years, Ghana and Togo show significant long-term deterioration, with IFC levels rising by 58.5% and 42.1% respectively. Nigeria, in contrast, has seen a 40.8% decline over the same period. Overall, the region reflects signs of recovery, though this progress is tempered by ongoing volatility driven by persistent conflict, climate-related shocks, and macroeconomic pressures.

Table 14: Prevalence of Insufficient Food Consumption in selected West African countries (March 2026)³⁶

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	●	0.00	●	0.00	●
Cote d'Ivoire	29.40	5.10	5.10	15.59	0.00	●	0.00	●	0.00	●
Ghana	29.80	8.40	8.40	23.96	0.00	●	0.00	●	58.49	↑
Mali	19.10	13.20	13.20	52.40	0.00	●	0.00	●	0.00	●
Niger	25.90	21.40	21.40	76.65	0.00	●	0.00	●	0.00	●
Nigeria	202.80	56.40	56.40	23.74	0.00	●	-40.38	↓	-43.82	↓
Togo	7.90	2.70	2.70	27.78	0.00	●	0.00	●	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.

³⁶ Author's construction based on WFP HungerMap Live

Maize

Figure 15: Price spreads for maize across select West African Countries³⁷

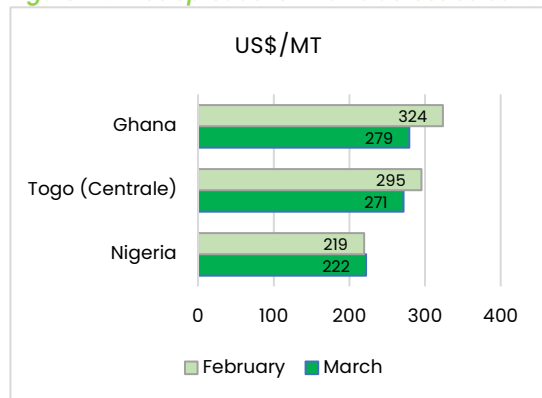


Figure 15 illustrates maize price movements in USD across selected West African markets. The result shows a decline in maize prices in Ghana and Togo by 13.8% and 8.1% respectively, while Nigeria experienced a minor (1.2%) increase, over the past one month.

Table 15 presents white maize price trends in local currencies across Ghana, Nigeria, and Togo. The data indicates an overall decline in maize price across Ghana, Nigeria, and most markets in Togo, though short-term volatility persists in selected locations. Ghana recorded a pronounced decline in its national average maize price, falling by 11.3% month-on-month and continuing a strong downward trend compared to three months (-18.5%), six months (-35.2%), and one year (-54.2%),

reflecting significantly improved supply conditions and easing market pressure compared to last year. In Nigeria, prices showed a slight month-on-month uptick of 3.1%, likely reflecting short-term market adjustments; however, medium- and long-term trends remain decisively downward, with prices lower by 42.4% year-on-year, signalling substantial normalization from previously elevated levels. Togo displayed more mixed sub-national dynamics: prices declined month-on-month in Centrale (-5.5%), Maritime (-1.8%), and Savanes (-7.6%), reinforcing the broader regional easing, while Lomé (DAGL) recorded a notable month-on-month increase of 6.5%. Nevertheless, all Togolese markets remain lower over six months and one year, confirming that, despite localized and short-term price upticks, the underlying regional maize market trend remains downward, supported by improved availability and relatively subdued demand pressures.

Table 15: Percentage changes in maize prices in West Africa³⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ghana	Maize (white)	National Average, (GHS/MT)	3,058.70	-11.25 ↓	-18.52 ↓	-35.15 ↓	-54.21 ↓
Nigeria	Maize (white)	National Average, NGN/KG	307.09	3.14 ▲	-9.59 ↓	-25.52 ↓	-42.40 ↓
Togo	Maize (white), XOF/Kg	Centrale, Retail, XOF/Kg*	155.00	-5.49 ↓	-3.73 ▬	-24.76 ↓	-32.31 ↓
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	231.00	6.45 ↑	3.13 ▲	-16.30 ↓	-8.70 ↓
Togo	Maize (white), XOF/Kg	Maritime, Retail, XOF/Kg*	167.00	-1.76 ▬	-1.76 ▬	3.73 ▲	-22.33 ↓
Togo	Maize (white), XOF/Kg	Savanes, Retail, XOF/Kg*	147.00	-7.55 ↓	0.00 ●	-24.62 ↓	-36.64 ↓

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 Countries³⁹

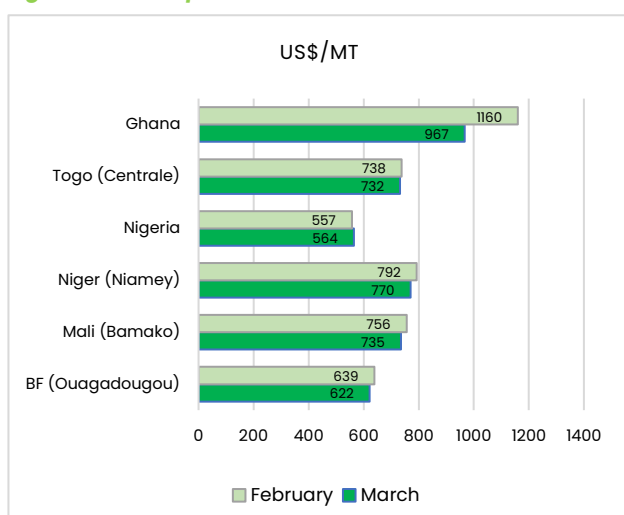


Figure 16 presents rice prices (in USD per metric tonne) across selected West African markets, highlighting month-on-month changes between February and March. Ghana recorded the highest rice prices in the comparison, though prices declined markedly from USD 1,160/MT in February to USD 967/MT in March (-17%). This reduction suggests easing market pressure, likely driven by improved import arrivals and seasonal supply replenishment.

Across the Sahelian and coastal markets, price movements were generally moderate. Togo (Centrale) recorded a marginal decline from USD 738/MT to USD 732/MT (-1%), while Nigeria saw prices edge down slightly from USD 557/MT to USD 554/MT (-1%), indicating relatively stable market conditions. Similarly, Niger (Niamey) and Mali (Bamako) experienced

³⁷ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

³⁸ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Togo

³⁹ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

modest price decreases of 3%, falling to USD 770/MT and USD 735/MT, respectively, reflecting steady supply availability. Burkina Faso (Ouagadougou) continued to record the lowest rice prices among the monitored markets, declining from USD 639/MT to USD 622/MT (-3%). Overall, the figure points to broadly easing rice prices across West Africa in March, underpinned by improved supply conditions and stable import flows, despite persistent cross-country price differentials linked to market structure and logistics.

Table 16 points to a broadly easing rice-price environment in local currencies across much of West Africa, characterized by widespread month-on-month stability or declines, alongside varied medium-term dynamics across countries and markets. In **Burkina Faso**, most wholesale markets recorded stable or declining prices month-on-month, with pronounced reductions over three, six, and twelve months, most notably in Bobo-Dioulasso and Dori, indicating improved supply conditions and a strong correction from last year's elevated price levels. **Mali** similarly exhibits an overall downward trend, as key markets including Bamako, Gao, Kayes, and Timbuktu continued to post sustained medium- and long-term declines; this is despite isolated month-on-month increases in Mopti (11.4%) and Sikasso (6.7%), which suggest localized and short-term price pressures amid generally adequate domestic availability. **Ghana** also recorded lower rice prices relative to the past 1–12 months, with current prices approximately 23 % and 27.7% below their six- and twelve-month levels, respectively.

In contrast, **Côte d'Ivoire** experienced rising rice prices compared to the past year, with prices about 13% higher year-on-year, reflecting tighter market conditions. **Niger** presents a more mixed picture: while short-term price increases were observed in Dosso and Maradi, most markets remain lower over six months and on an annual basis, signalling a gradual easing trend despite localized volatility. **Nigeria** stands out with a strong month-on-month increase in milled rice prices (3.2%) and a sharp three-month rise of 21.6%. Nevertheless, prices remain significantly lower than one year ago, reflecting the continued influence of improved harvests, foreign-exchange stability, and supportive policy measures. In **Togo**, most regions recorded relatively low-price increases (0–5%) over the past one to six months, with the DAGL (Lomé) market posting a notable 8.5% increase in March compared to February. However, rice prices across all regions remain below their year-on-year levels, pointing to improved availability and a generally softer market environment overall.

Table 16: Percentage changes in rice prices in West Africa⁴⁰

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	0.00	0.00	-23.53	-18.75
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	41,000.00	0.00	-4.65	-18.00	-18.00
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	40,000.00	-6.98	-9.09	-11.11	-28.57
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	38,000.00	0.00	-15.56	-15.56	-24.00
Burkina Faso	Rice (imported)	Kongoussi, Wholesale, XOF/100 kg	42,500.00	0.00	-15.00	-15.00	-29.17
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	35,500.00	0.00	-4.05	-11.25	-22.83
Côte d'Ivoire	Rice	Abidjan, Retail, XOF/Kg*	695.00	0.72	0.72	0.72	13.01
Ghana	Rice	National Average, (GHS/MT)	10,600.00	-14.17	-11.67	-23.00	-27.65
Mali	Rice	Bamako, Wholesale, XOF/100 KG	42,000.00	0.00	-6.67	-6.67	-12.50
Mali	Rice	Gao, Wholesale, XOF/100 KG	45,000.00	0.00	-10.00	-30.77	-30.77
Mali	Rice	Kayes, Wholesale, XOF/100 KG	52,000.00	0.00	0.00	0.00	-3.70
Mali	Rice	Mopti, Wholesale, XOF/100 KG	44,000.00	11.39	-10.20	-8.33	-10.20
Mali	Rice	Ségou, Wholesale, XOF/100 KG	40,000.00	-2.44	-5.88	-5.88	-13.04
Mali	Rice	Sikasso, Wholesale, XOF/100 KG	40,000.00	6.67	0.00	-5.88	-15.79
Mali	Rice	Tombouctou, Wholesale, XOF/100 KG	35,000.00	0.00	-12.50	-28.57	-27.08
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 KG	38,500.00	0.00	-1.28	-6.10	-19.79
Mali	Rice (imported)	Gao, Wholesale, XOF/100 KG	46,000.00	2.22	-8.00	-17.86	-23.33
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 KG	30,000.00	0.00	-4.76	-7.69	-22.08
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 KG	42,500.00	1.19	-5.56	-5.56	-15.00
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 KG	39,000.00	-2.50	-7.14	-13.33	-25.00
Niger	Rice (imported)	Agadez, Wholesale, XOF/Kg	460.00	0.00	0.00	-11.54	-30.30
Niger	Rice (imported)	Dosso, Wholesale, XOF/Kg	460.00	0.00	4.55	-11.54	-23.33
Niger	Rice (imported)	Maradi, Wholesale, XOF/Kg	430.00	2.38	2.38	-6.52	-17.31
Niger	Rice (imported)	Niamey, Wholesale, XOF/Kg	440.00	0.00	0.00	-8.33	-21.43
Nigeria	Rice (milled)	National Average, NGN/KG	780.03	3.20	21.59	0.28	-22.85
Togo	Rice (imported)	Centrale, Retail, XOF/Kg*	418.00	1.95	-3.69	-12.37	-16.90
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	636.00	8.53	1.76	1.76	-4.07
Togo	Rice (imported)	Maritime, Retail, XOF/Kg*	512.00	-3.76	2.61	-10.49	-2.29
Togo	Rice (imported)	Savanes, Retail, XOF/Kg*	460.00	2.45	1.10	0.44	-14.66

⁴⁰ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 Countries⁴¹

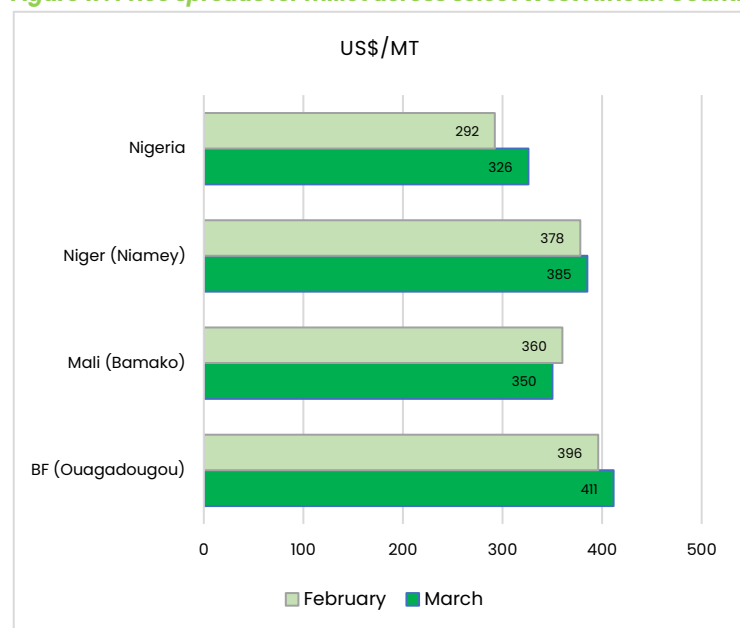


Figure 17 illustrates millet price movements (in USD per metric tonne) across selected West African markets, highlighting month-on-month changes between February and March. Burkina Faso (Ouagadougou) recorded the highest millet prices in the comparison, with prices increasing from USD 398/MT to USD 411/MT (+3%), indicating firm demand and constrained market supply.

Similarly, Nigeria experienced a notable price increase, with millet prices rising from USD 292/MT to USD 326/MT (+12%), suggesting tightening availability and sustained consumption demand. Niger (Niamey) also registered a modest price increase from USD 378/MT to USD 385/MT (+2%), reflecting stable but slightly tightening market conditions.

In contrast, Mali (Bamako) recorded a marginal price decline, with millet prices easing from USD 360/MT to USD 350/MT (–3%), pointing to relatively better local availability and subdued demand pressures.

Overall, the figure indicates mixed millet price trends across the region, shaped by localized supply dynamics, demand conditions, and intra-regional trade flows.

Table 17 shows that millet prices in local currency across West Africa continue to display mixed short-term movements alongside a clear pattern of medium- to long-term softening from earlier seasonal peaks. In **Burkina Faso**, month-on-month prices were largely stable across key wholesale markets, with only modest movements recorded; declines in Dori (–3.3%) and Kongoussi (–3%) and an increase in Dedougou (2.4%) and Ouagadougou (+6.8%). In **Mali**, short-term changes were generally mixed, with Gao, Mopti, and Tombouctou recording 10%, 4.6%, and 12.3% respective month-on-month increase, while Segou experienced a decline (–9.1%). Despite these localized movements, prices remain firmly lower over three to twelve months, typically declining by 15–38%, consistent with improved post-harvest availability.

Niger generally presents a month-on-month price increase: Dosso (+2.50%), Maradi (+3.13%), Niamey (+4.76%), Tillaberi (+4.55%), and Zinder (+10.0%), contrasted by a sharp decline in Agadez (–18.75%). Nevertheless, medium- and long-term trends are broadly lower across all markets, with six-month declines of 13–45% and year-on-year reductions of 27–41%, indicating sustained easing relative to last year. **Nigeria** diverges from the regional pattern in the short term, with the national average millet price rising sharply month-on-month (+13.6%) and over three months (+23.2%), although prices remain significantly below last year's level (–23%), underscoring that recent tightening follows earlier price normalization linked to improved domestic supply conditions.

Table 17: Percentage changes in millet prices in select West African Countries⁴²

⁴¹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁴² Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

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	21,500.00	2.38	0.00	-14.00	-33.85
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	29,000.00	-3.33	-3.33	-21.62	-29.27
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	25,000.00	0.00	0.00	-13.79	-24.24
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	32,000.00	0.00	-3.03	-14.67	-24.71
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	22,500.00	0.00	0.00	-19.64	-35.71
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	23,500.00	6.82	0.00	-14.55	-30.88
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	23,000.00	0.00	-23.33	-38.67	-42.50
Mali	Millet	Bamako, Wholesale, XOF/100 KG	20,000.00	0.00	-9.09	-16.67	-37.50
Mali	Millet	Gao, Wholesale, XOF/100 KG	27,500.00	10.00	0.00	-15.38	-26.67
Mali	Millet	Kayes, Wholesale, XOF/100 KG	26,000.00	0.00	-7.14	-13.33	-25.71
Mali	Millet	Mopti, Wholesale, XOF/100 KG	23,000.00	4.55	2.22	-14.81	-28.13
Mali	Millet	Ségou, Wholesale, XOF/100 KG	15,000.00	-9.09	-16.67	-21.05	-50.00
Mali	Millet	Sikasso, Wholesale, XOF/100 KG	24,000.00	0.00	-4.00	-12.73	-26.15
Mali	Millet	Tombouctou, Wholesale, XOF/100 KG	32,000.00	12.28	-8.57	-12.33	-15.79
Niger	Millet	Agadez, Wholesale, XOF/Kg	260.00	-18.75	-9.72	-20.61	-35.00
Niger	Millet	Dosso, Wholesale, XOF/Kg	205.00	2.50	-6.82	-6.82	-28.07
Niger	Millet	Maradi, Wholesale, XOF/Kg	165.00	3.13	0.00	-13.16	-40.00
Niger	Millet	Niamey, Wholesale, XOF/Kg	220.00	4.76	0.00	-4.35	-26.67
Niger	Millet	Tillabéri, Wholesale, XOF/Kg	230.00	4.55	-17.86	-14.81	-23.33
Niger	Millet	Zinder, Wholesale, XOF/Kg	220.00	10.00	4.76	-15.38	-33.33
Nigeria	Millet	National Average, NGN/KG	450.93	13.63	23.23	-2.68	-22.97
Nigeria	Rice (milled)	National Average, NGN/KG	780.03	3.20	21.59	0.28	-22.85

Note: Latest price is for March 2026, * February 2026, and ** January 2026

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

Sorghum

Figure 18: Price spreads for sorghum across select West African Countries⁴³

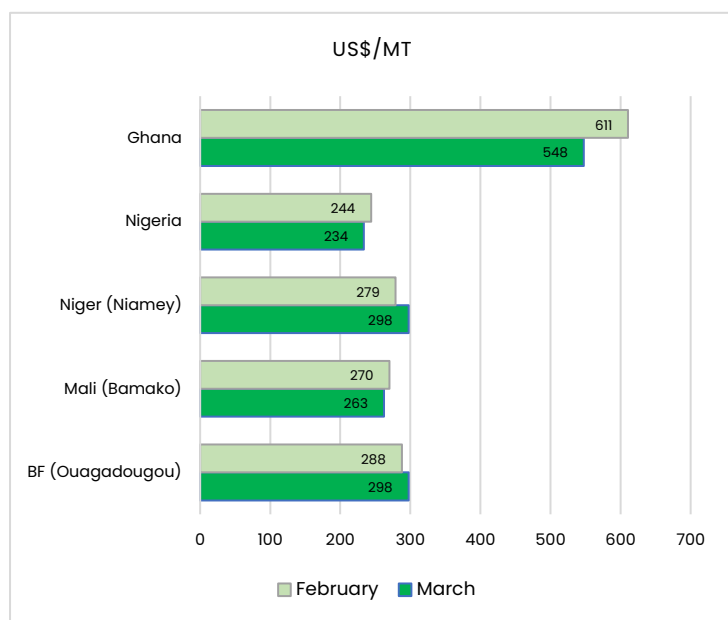


Figure 18 presents sorghum prices (in USD per metric tonne) across selected West African markets, highlighting month-on-month changes between February and March. Ghana recorded the highest sorghum prices in the comparison, though prices declined from USD 611/MT to USD 548/MT (-10%), suggesting easing market pressure, likely reflecting improved availability and market adjustments.

Elsewhere in the region, price movements were mixed but relatively moderate. Nigeria experienced a slight month-on-month decline, with prices falling from USD 244/MT to USD 234/MT (-4%), while Mali (Bamako) also recorded a marginal decrease to USD 263/MT (-3%), pointing to stable local supply conditions. In contrast, Niger (Niamey) and Burkina Faso (Ouagadougou) registered modest price increases of 7% and 3%, rising to USD 298/MT in both markets. These increases likely

reflect localized tightening of supplies and firm demand. Overall, the figure indicates generally stable sorghum markets across West Africa, with localized variations driven by country-specific supply and demand dynamics.

Table 18 shows sorghum prices in local currencies across West Africa, which exhibits mixed short-term movements alongside a broadly easing medium- to long-term trend. Overall, sorghum prices are lower than they were 6-12 months ago across all monitored markets, except in Ghana where it is 5.9% higher than the six-month level. In Burkina Faso, month-on-month changes were generally limited, with most wholesale markets remaining stable or registering small declines, including Bobo-Dioulasso (-6.7%) and Dori (-4%). However, notable increases were observed in Dédougou (+6.1%) and Ouagadougou (+6.3%), while three-, six-, and twelve-month trends point to sustained price declines across

⁴³ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

most markets.

In **Mali**, prices were largely stable or declining across the one- to twelve-month horizon, with only localized month-on-month increases in Gao (+19.6%), Mopti (+8.6%), and Tombouctou (+10.2%). Despite these short-term upticks, medium- and longer-term trends remain lower, with year-on-year declines ranging from roughly 15% to 40%, reflecting improved availability and softened demand. **Niger** similarly recorded predominantly stable-to-lower prices across markets, although short-term increases were evident in Niamey (+9.7%) and Zinder (+12.5%), while Agadez prices remained elevated over the past three months (+7.7%). **Nigeria** diverges from this pattern, with the national average sorghum price declining modestly month-on-month (-2.4%) but rising sharply over three months (+15.6%), indicating that recent volatility is occurring within a broader context of medium- to long-term price normalization.

Table 18: Percentage changes in sorghum prices in select West African countries ⁴⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	21,000.00	-6.67 ↓	-2.33 ↘	-6.67 ↓	-10.64 ↓
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	17,500.00	6.06 ↑	9.38 ↑	-16.67 ↓	-31.37 ↓
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	24,000.00	-4.00 ↘	-4.00 ↘	-17.24 ↓	-31.43 ↓
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	18,500.00	0.00 ●	-2.63 ↘	-26.00 ↓	-28.85 ↓
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	22,500.00	0.00 ●	-6.25 ↓	-10.00 ↓	-10.00 ↓
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	20,000.00	0.00 ●	5.26 ↑	-14.89 ↓	-20.00 ↓
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	17,000.00	6.25 ↑	-10.53 ↓	-19.05 ↓	-38.18 ↓
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	18,000.00	-2.70 ↘	-2.70 ↘	-21.74 ↓	-35.71 ↓
Ghana	Sorghum	National Average, (GHS/MT)	6,000.00	-7.69 ↓	-5.26 ↓	5.88 ↑	-5.84 ↓
Mali	Sorghum	Bamako, Wholesale, XOF/100 KG	15,000.00	0.00 ●	-6.25 ↓	-16.67 ↓	-40.00 ↓
Mali	Sorghum	Gao, Wholesale, XOF/100 KG	27,500.00	19.57 ⬆	-8.33 ↓	-21.43 ↓	
Mali	Sorghum	Kayes, Wholesale, XOF/100 KG	19,000.00	0.00 ●	-5.00 ↓	-20.83 ↓	-24.00 ↓
Mali	Sorghum	Mopti, Wholesale, XOF/100 KG	19,000.00	8.57 ↑	0.00 ●	-13.64 ↓	-20.83 ↓
Mali	Sorghum	Ségou, Wholesale, XOF/100 KG	14,000.00	-6.67 ↓	-15.15 ↓	-30.00 ↓	-36.36 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 KG	19,000.00	-5.00	-5.00 ↓	-5.00 ↓	-15.56 ↓
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 KG	27,000.00	10.20 ↑	-22.86 ↓	-23.94 ↓	-20.59 ↓
Niger	Sorghum	Agadez, Wholesale, XOF/Kg	280.00	-12.50 ↓	7.69 ↑	-14.11 ↓	-22.22 ↓
Niger	Sorghum	Dosso, Wholesale, XOF/Kg	175.00	-12.50 ↓	-20.45 ↓	-27.08 ↓	-37.50 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/Kg	130.00	0.00 ●	-13.33 ↓	-25.71 ↓	-44.68 ↓
Niger	Sorghum	Niamey, Wholesale, XOF/Kg	170.00	9.68 ↑	-10.53 ↓	-15.00 ↓	-39.29 ↓
Niger	Sorghum	Tillabéri, Wholesale, XOF/Kg	180.00	0.00 ●	-10.00 ↓	-21.74 ↓	-40.00 ↓
Niger	Sorghum	Zinder, Wholesale, XOF/Kg	180.00	12.50 ↑	0.00 ●	-10.00 ↓	-25.00 ↓
Nigeria	Sorghum (white)	National Average, NGN/KG	323.33	-2.35 ↘	15.56 ⬆	-20.21 ↓	-33.98 ↓

Note: Latest price is for March 2026, * February 2026, and ** January 2026

● = 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 Conditions⁴⁵

In **West Africa**, land preparation and planting for the 2026 main agricultural season are progressing under generally favourable conditions across the region, supported by substantial and continuing rainfall in southern areas, though insecurity continues to constrain activities in conflict-affected zones. Planting of main-season cereals is now underway across southern West Africa, including Liberia, Côte d'Ivoire, Ghana, Togo, Benin, Nigeria, Cameroon, and the Central African Republic, while main-season rice planting has begun in southern Nigeria and Cameroon's Adamaoua region. Along the Sahelian belt, harvesting of second-season rice is ongoing in Mauritania and Mali. Overall, vegetation conditions are favourable at the start of the season, but persistent conflict, particularly in central Mali, remains a key risk to agricultural activities and local food security.

⁴⁴ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

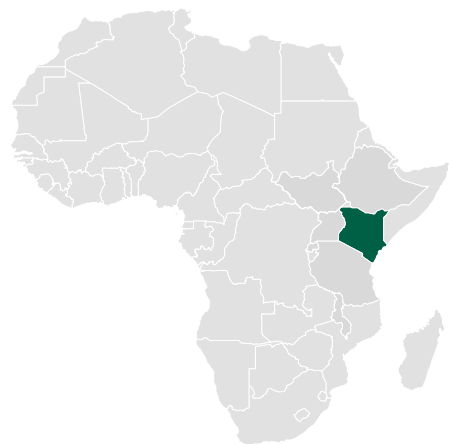
⁴⁵ [EarlyWarning_CropMonitor_202602.pdf](#)

Food Trade Updates

East and Southern Africa Region

Figure 19 provides an overview of the events and activities that have taken place across various countries in East Africa over the past month and that are affecting the food trade in the region.

Figure 19: East and Southern Africa cross-border trade updates, March 2026



Kenya

The Kenya Revenue Authority (KRA) has announced the implementation of the East African Community (EAC) Customs Bond, effective 23 March 2026. The new system enables traders and clearing agents to use a single, region-wide guarantee recognized by all EAC Partner States when transporting goods across borders. This marks a significant shift from the current arrangement, under which each member state requires its own national bond. With the introduction of a unified customs bond, cross-border trade is expected to become more efficient, less costly, and easier to administer across the entire EAC region.

Figure 20: West Africa cross-border trade updates, March 2026



Burkina Faso

Burkina Faso imposed a nationwide ban on fresh tomato exports in mid-March 2026 as part of a policy to protect domestic processing industries and secure raw material supplies, immediately disrupting regional trade and tightening supplies in neighbouring countries, particularly Ghana, which relies heavily on Burkinabe tomato imports during seasonal production gaps. The restriction, announced on March 16 and enforced from March 19, led to shipment delays, rising market prices, and concern among traders and processors across West Africa. Following diplomatic engagements on the margins of the WTO Ministerial Conference (MC14) in Yaoundé, Burkina Faso reversed the decision on April 2, 2026, lifting the export ban to ease regional supply pressures while signalling continued commitment to strengthening domestic agro-processing capacity through longer-term industrial policy measures.

Monitoring Food Policy and Trade Developments

Southern and West Africa Monthly Summary

March 2026

Zambia: Zambia has benefited from a bumper harvest, but its impact has been constrained by an unclear export strategy, protectionist pressures, delayed payments, and inadequate storage, limiting both domestic and regional gains. While food security is currently stable, it remains fragile due to weather risks and structural weaknesses, particularly in post-harvest management. With elections approaching in 2026, government responses are likely to prioritise short-term, visible interventions over deeper reforms, reinforcing policy uncertainty and deterring private investment. Going forward, strengthening storage, processing, and supply chains will be critical to sustaining stability. There is also a key role for stakeholders to support more reliable regional trade, while helping donors anticipate election-year disruptions and build more adaptive, resilient intervention frameworks.

Malawi: Malawi's food system remains fragile, with stabilisation uneven and delayed due to structural constraints, misaligned interventions, political pressures, and forex shortages limiting trade. Food security continues to depend heavily on external support, with recurring climate shocks reinforcing instability and recent flooding expected to delay domestically processed grain supplies. The country's limited capacity to absorb shocks means that the timing of interventions is critical to recovery. Government response has been shaped by election dynamics, with slow import implementation and unclear policy direction exacerbating uncertainty. Looking ahead, strengthening local production, diversifying trade channels, and improving supply chain resilience will be key. Donors and stakeholders can play a central role, particularly through timely import financing, emergency support, and investment in domestic input production and more efficient trade systems.

Mozambique: Mozambique's food system is under strain, with trade policies aimed at managing forex shortages and tightening import controls increasingly constraining formal markets and risking greater informality, price pressures, and inefficiencies. Food security is fragile, shaped by climate vulnerability, market inefficiencies, and restricted trade flows that limit effective distribution. While the government's push for self-sufficiency reflects longer-term ambitions, current measures are placing pressure on SMEs and risk short-term supply disruptions, particularly if the ICM lacks capacity to manage imports. At the same time, an unclear agricultural strategy continues to deter private investment. Strengthening input supply, climate resilience, and supply chains will be critical, while opportunities such as the Nacala logistics corridor offer potential to improve regional trade and support longer-term market stability.

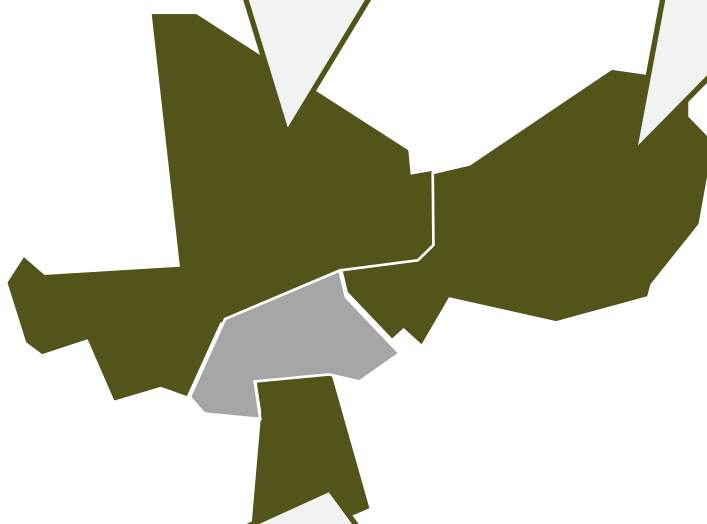
Country	Headline summary
Malawi	Trade - Food system stabilisation has been uneven and delayed due to structural constraints, misaligned interventions, political priorities, and forex shortages limiting both imports and exports. Future interventions should focus on boosting local production and supply chain resilience to reduce reliance on forex-constrained imports. Also, diversifying trade channels beyond large, centralised imports will improve efficiency and reduce dependency on slow cross-border shipments. Food Security - Malawi's food security remains fragile and heavily dependent on external support, with recurring climate shocks and structural forex shortages perpetuating instability. Flooding is expected to delay the availability of domestically processed grains by at least four weeks due to damaged infrastructure and equipment. Plus, Malawi's limited capacity to absorb shocks makes stability fragile, so well-timed interventions can have outsized impacts on recovery and resilience. Government Response - Malawi's food crisis was worsened by election timing, slow implementation of imports, and unclear post-election agricultural policy. Interventions should be designed to withstand political cycles and policy uncertainty by strengthening trade implementation, market communication, and contingency strategies. Stakeholder Initiatives - Donor support is essential for stabilising food security and markets, particularly through timely import financing and emergency response. Import financing windows are crucial, and AGRA can help donors design earlier, more predictable windows to prevent price spikes and worsening food insecurity, while stakeholders have an opportunity to support Malawi's domestic input production and import arrangements to address capacity and forex constraints.
Mozambique	Trade - Mozambique's food trade policies are designed to manage its forex shortage and tighten control over a poorly regulated import system, but are restricting market trade, which risks boosting informal trade, undermining market regulation, and creating lasting inefficiencies in the supply chain. Tighter import controls risk higher prices and market distortions, while restoring open trade will require reliable supply, strong regulation, and safeguards for government concerns. Food Security - Mozambique's food security remains fragile, as climate vulnerability, restrictive trade controls, and market inefficiencies limit effective food distribution. Interventions should strengthen input supply, support climate-resilient farming, and improve distribution while remaining adaptable to policy and security disruptions. Government Response - Mozambique's import restrictions aim for self-sufficiency but pressure SMEs and risk short-term food insecurity, despite government recognition of the need for balanced trade and production. Mozambique faces supply and price risks if the ICM cannot handle imports, so strengthening supply chain resilience is essential to maintain production and market stability. Stakeholder Initiatives - Mozambique's unclear agricultural strategy deters private investment, limiting growth and leaving food supply vulnerable to shocks. Nacala Port and its logistics corridor offer strategic opportunities for investors and donors to boost regional agricultural trade, connecting Mozambique's breadbasket to multiple foreign markets.

Zambia	Trade • Zambia's bumper harvest was undermined by unclear export strategy, protectionist pressures, delayed payments, and poor storage, limiting its impact on local and regional food security. Zambia's export plans will need cautious implementation, requiring flexible planning and risk management to respond to changing trade restrictions and political pressures. AGRA can help donors strengthen Zambia-linked supply for deficit markets by addressing reserve management, payment reliability, trade intelligence, and cross-border execution challenges. Food Security • Zambia's food security is stable after the bumper harvest but remains fragile due to weather risks and inadequate storage limiting sustained supply. Long-term stability in Zambia requires investing in storage, processing, resilient supply chains, and climate-smart practices to reduce losses and market vulnerability. Government Response • Ahead of the 2026 elections, Zambia's government is likely to focus on visible, short-term interventions rather than substantive agricultural reforms, risking long-term sector vulnerability. Pre-election engagement in Zambia should focus on aligning food system strengthening with political incentives and building adaptive strategies to navigate policy delays and uncertainty. Stakeholder Initiatives • Zambia's policy uncertainty and election-year pressures continue to deter private investment, slowing long-term agricultural development. AGRA can help donors pre-plan for election-year shocks by anticipating capacity gaps and supporting systems that operate with minimal approvals.
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Food security and trade developments – West Africa

Mali: Mali's food system is under severe strain from insecurity, climate shocks, and flooding, which disrupt production, trade, and access, driving price volatility and localised shortages, particularly in conflict-affected areas, which are spreading. The early lean season calls for rapid, targeted interventions, such as pre-positioned supplies, flexible programming, and market-based approaches, especially where state access is limited. With government capacity constrained, programs must strategically support the new agriculture minister, prioritise regions with weakest government action, and balance security and oversight while delivering context-specific, effective aid to vulnerable populations.

Niger: Informal trade has been playing an increasingly important role in the movement of food in Niger, with conflict, restricted routes, and a cereal export ban limiting formal networks. Interventions should prioritise market access and secure trade channels, while targeted support, improved inputs, and strengthened monitoring are needed to address gaps in the underfunded irrigated farming campaign. Effective engagement requires balancing government compliance with local needs through flexible programming, stakeholder mapping, and ongoing dialogue to ensure impactful, politically acceptable initiatives.



Ghana: Ghana's grain surplus has exposed structural weaknesses in its food trade system, including weak domestic absorption, ineffective procurement, poor distribution, and limited price competitiveness, leaving regional food insecurity unresolved and undermining farmer incentives and future production. The continued export ban, prioritising price stability over trade and producer welfare, further distorts markets but creates space to test managed trade models. To address this, interventions must shift beyond production towards commercial market development, while donors prioritise risk management to better align output with reliable demand and support long-term sector stability.

Country	Headline summary
Ghana	Food Trade • Ghana's grain surplus has highlighted structural weaknesses in its food trade system, revealing inadequate domestic absorption capacity, ineffective state procurement, and poor price competitiveness against imports even under export restrictions. Initiatives should be centred on commercial market development, supporting value chain actors and policymakers with evidence on competitiveness and market access while shifting the focus beyond production alone. Food Security Despite a national grain surplus, Ghana faces persistent regional food insecurity due to weak distribution and market access, undermining prices, farmer incentives, and ultimately future production. The expected production cuts point to a structural reduction, and without stronger demand stabilisation and improved links between market access and financing, supported by tools like warehouse receipts, aggregators, and multinational buyers, Ghana risks continued cycles of surplus and deficit. Government Response Ghana's grain export ban prioritises domestic price control over regional trade and farmer concerns, which distorts supply flows, weakening producer incentives, and exacerbating oversupply and reduced investment. The export ban appears unlikely to be lifted soon, as the government appears willing to absorb farmer losses for macroeconomic stability despite rising pressure, creating an opportunity for AGRA to pilot managed trade alternatives. Stakeholder Initiatives Upstream production investments risk being undermined by weak domestic and regional market absorption, as a focus on productivity and resilience has not addressed surplus and demand constraints. Donors and investors should prioritise producer risk management to curb recurring deficit-oversupply cycles, with AGRA helping align production with reliable demand and support long-term sector stability.
Mali	Food Trade • Mali's food trade system is increasingly constrained by insecurity, causing disruptions, fragmenting trade networks, raising transport costs, limiting market access, and driving supply chain tightening, price volatility, and risks of localised shortages. The spread of insecurity along key trade corridors necessitates shifting from centralised routes to flexible, decentralised supply systems that strengthen local markets, investing in storage near production, developing contingency logistics, and engaging the private sector to maintain food flows and curb urban price spikes. Food Security Mali's food security remains highly fragile, with climate shocks, flooding, and persistent insecurity disrupting production, trade, and access, leaving conflict-affected regions particularly vulnerable despite uneven agricultural gains. The early lean season calls for rapid, targeted interventions to maintain food access through pre-positioned supplies, flexible programming amid insecurity, and market-based approaches like buyer aggregation and reserve purchasing to ensure dependable offtake where state access is limited. Government Response Mali's government has struggled to address food insecurity due to resource constraints, underinvestment, and competing priorities, though the appointment of a new agriculture minister offers potential for more targeted and coordinated interventions. Inadequate government interventions highlight the need for programs that work around capacity

	constraints, strategically support the new agriculture minister, and target regions where government action is weakest to strengthen Mali's food security. Stakeholder Initiatives A challenging operating environment in Mali, shaped by conflict, government control, funding constraints, and restricted access, has limited stakeholder activity, which has hindered food delivery, and left displaced populations especially vulnerable. As such, interventions in Mali must balance security risks and government oversight while using flexible, context-specific approaches to deliver targeted support amid resource and access constraints.
Niger	Food Trade • Informal trade is playing an increasing role in the movement of food in Niger and cross-border flows, with conflict, restricted routes, and a cereal export ban limiting formal networks and market access, making Nigeria the primary trading partner. Initiatives could stabilise supply and reduce reliance on informal networks by focusing on a few commercially viable cross-border corridors with existing buyer demand, workable logistics, and political space to operate. Food Security Despite national food sufficiency, insecurity and a fragmented distribution system in Niger prevent supplies from reaching conflict-affected areas, leaving local deficits, stranded surpluses, and forcing farmers to sell at a loss, though production remains resilient. Interventions should prioritise improving market access and secure trade channels to connect surplus in conflict-affected areas to demand centres, enabling fair prices and stabilising food availability. Government Response Niger's government has struggled to translate food and agricultural policy into effective action, with regionalised efforts falling short, tight information control limiting transparency, and an implementation gap hindering evidence-based decision-making. The underfunded and poorly implemented irrigated farming campaign underscores the need for organisations to provide targeted support, improve access to inputs, and strengthen monitoring to fill gaps and reach priority areas. Stakeholder Initiatives Stakeholders in Niger face operational and compliance constraints under government oversight, requiring alignment with priorities such as job creation, though the country remains relatively accessible, compared with other Sahel states, and offers guidance for programming. Effective engagement in Niger requires balancing government compliance with local needs through flexible programming, stakeholder mapping, and ongoing dialogue to ensure politically acceptable and impactful interventions.



Value	Unrealized P/L	%Unre
1000.00		
6,700.00	-14,930.33	-0.22
200.00	+5,309.28	+1.25
500.00	+13,022.92	+1.75

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

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