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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 68th 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 April 2026 Food Security Monitor edition:

Developments in Global Food and Fertilizer Markets

- Global food commodity prices are edging higher, with the FAO Food Price Index up 1.6% to 130.7 in April 2026, its third consecutive monthly rise, driven by higher vegetable oil, meat, and cereal prices amid rising energy and transport costs linked to Middle East tensions. This trend is reinforced by strengthening grain and oilseed markets, as the IGC GOI rose nearly 5% month-on-month and 7% year-on-year to 232.9, with notable gains in maize, wheat, and soyabeans, signalling mounting short-term price pressure despite continued divergence across commodities.
- Fertiliser, fuel, and transport markets across Africa are showing mounting pressure from the crisis, translating into rising production and food security risks, particularly in import-dependent countries. As the U.S.–Israel–Iran conflict intensifies, global fertilizer markets are reflecting upward pressure, with urea prices up by 49.6%, followed by DAP (14.9%), MAP (14.4%), and potash (5.1%), underscoring the cumulative impact of prolonged supply risks and elevated energy costs.
- The impact of the crisis has already begun to impact fertiliser, fuel, and transport costs across sub-Saharan Africa. Fertiliser prices have increased sharply in Rwanda, Malawi, Mozambique, and Nigeria compared to the past 1–12 months, with Rwanda's NPK up 7.9% month-on-month and 33.5% year-on-year, and urea 26.3% higher than a year ago, while Malawi and Mozambique face the steepest escalation, as urea prices jumped 36–58% in one month and remain 88–90% above last year, alongside large NPK increases. Nigeria has seen more moderate but sustained fertiliser inflation, with NPK up 17% year-on-year and urea up 12.6% month-on-month and 23.5% year-on-year, whereas Uganda stands out as an exception, recording sharp fertiliser price declines, suggesting easing supply conditions.
- At the same time, conflict-related disruptions in the Gulf are driving up fuel and transport costs across the region: fuel prices surged sharply between March and April in countries such as Mozambique (diesel +46%), Rwanda (petrol +38%), Tanzania (diesel +22%, Petrol +25%), Kenya (diesel +19%), and Malawi (+26% for both petrol and diesel). These combined shocks—higher fertiliser, fuel, and logistics costs—are raising the landed cost of food and other essentials, with Mozambique among the most exposed due to its dependence on fertiliser imports via the Strait of Hormuz, and are likely to be passed through to consumers, intensifying food price pressures across East, Southern, and West Africa.

Food Commodity Prices Updates

- Across **Eastern Africa**, staple food commodity prices, particularly maize and rice, show heightened volatility and generally elevated levels, driven by a mix of seasonal supply changes, strong demand, and structural and macroeconomic pressures. Maize prices recorded sharp month-on-month increases in several deficit markets, rising by about 15% in Ethiopia and 8% in Uganda, while South Sudan, already the highest-priced market, saw a further 7% increase, reflecting persistent supply constraints and high transaction costs. In contrast, surplus markets such as Tanzania experienced notable declines (–9%), supported by improved availability following recent harvests, while Kenya remained relatively stable (–2%). Despite these short-term movements, maize prices remain significantly higher year-on-year across much of the region, with increases exceeding 60% in Ethiopia and around 35% in both South Sudan and Uganda. Rice prices also exhibited mixed trends, increasing sharply in Uganda (+13%) and Rwanda (+4%), remaining high and relatively stable in Kenya (+0.4%), and declining in Tanzania (–5%) due to improved supply. Overall, while some markets benefit from seasonal inflows that ease prices temporarily, staple food prices across East Africa remain elevated over the medium to long term, underscoring ongoing structural deficits, high costs, and continued vulnerability to market shocks.
- Across **Southern Africa**, staple food commodity prices show mixed but generally easing trends as harvest inflows improve market supply, although country-specific shocks and structural factors continue to drive divergence. Maize prices declined sharply in several markets, notably in Malawi (–17% month-on-month) and Zimbabwe (–8%), reflecting improved availability and seasonal supply recovery, while Zambia also posted a moderate decrease (–5%). In contrast, Mozambique recorded a month-on-month maize price increase of about 5%, linked to lingering flood-related supply disruptions. Despite recent declines, medium-term pressures persist in some countries, such as Zambia, where maize prices remain 23.5% higher over six months, although still 17% lower year-on-year. Rice

prices followed similarly mixed patterns: Mozambique and Malawi saw notable declines (–9% and –3%, respectively), indicating easing supply conditions, while Zambia registered a modest increase of 2% due to firm demand. Overall, both maize and rice prices across the region point to gradual market normalization supported by strong harvests, though localized supply disruptions, currency effects, and structural constraints continue to generate uneven price movements.

- Across **West Africa**, staple food commodity prices are exhibiting mixed but generally easing trends, reflecting post-harvest supply improvements alongside localized market pressures. Maize prices showed divergent month-on-month movements between March and April, with increases of about 5% in Bamako, Mali, and Ouagadougou, Burkina Faso, contrasted by sharp declines in Ghana (–16%) and a moderate decrease in Niger (–4%), indicating improved availability. Rice prices followed a similar pattern: Nigeria and Ghana recorded substantial month-on-month declines of around 16–20%, while Togo experienced localized increases of about 8%, pointing to tightening supply in specific areas. Overall, maize and rice prices in most monitored markets remain below last year's levels, although short-term price increases, such as maize prices 11–18% above recent averages in Mopti, Mali, and rice prices up 14.2% year-on-year in Togo's Maritime region, highlight continued localized volatility driven by market-specific dynamics.

Food Security Updates

- Food security across **East Africa** remains fragile and uneven, with conflict, displacement, high prices, and supply-side shocks sustaining widespread Crisis (IPC Phase 3) and localized Emergency (IPC Phase 4) outcomes. Ethiopia continues to face the most acute pressures, with Emergency conditions in parts of East Hararghe and among newly arrived South Sudanese refugees in Gambela, while large areas of northern and pastoral regions remain in Crisis, driven by conflict, fuel shortages linked to Middle East developments, elevated food prices, rainfall deficits, and weak livestock productivity. In Kenya, the long rains are expected to bring gradual improvement, but Crisis outcomes persist in pastoral, marginal agricultural, and refugee-hosting areas due to low herd sizes, depleted food stocks, and high staple prices, with some households slipping into Emergency. South Sudan's food security situation is deteriorating sharply, with 7.8 million people projected to face acute food insecurity (IPC 3+) between April and July 2026—including Catastrophe—amid conflict, displacement, access constraints, and funding shortfalls. In Uganda, severe food insecurity persists in Karamoja and among refugees and host communities, where poor harvests, reduced assistance, and limited livelihoods are expected to keep Crisis and Emergency conditions in place through early 2026.
- Across **Southern Africa**, food security conditions are showing seasonal improvement but remain fragile, with Stressed (IPC Phase 2) and Crisis (IPC Phase 3) outcomes persisting among vulnerable households due to climate shocks, high prices, and weak purchasing power. In Malawi, the start of the 2026 harvest has improved access to food and income in central and northern regions, but southern areas remain Stressed following consecutive climate shocks and localized flooding that affected over 300,000 people, while rising fuel and fertilizer costs continue to constrain recovery. Mozambique remains the most severely affected, with Crisis outcomes prevailing across flood-, drought-, and conflict-affected areas, where repeated cyclones, poor harvests, above-average food prices, and ongoing insecurity continue to erode livelihoods despite the onset of the main harvest. In Zimbabwe, food security is gradually improving with harvests supporting Minimal outcomes in surplus areas and Stressed conditions elsewhere, though below-average production, rising food and input prices, and weak incomes are expected to increase market dependence later in the year, partially offset by favourable livestock conditions and non-farm livelihood activities.
- Food security conditions across **West Africa** remain severely constrained and are expected to deteriorate in mid-2026, despite generally improved food supplies and prices, driven primarily by insecurity, displacement, market disruptions, and rising living costs. Crisis (IPC Phase 3) outcomes persist across large parts of Burkina Faso, Mali, Niger, and northern Nigeria, with Emergency (IPC Phase 4) present or emerging in the most insecure and inaccessible areas, particularly Ménaka in Mali and parts of northeast Nigeria. Armed conflict, road blockades, and attacks continue to disrupt trade flows, livestock movements, and livelihoods, while high food prices, well above five-year averages in many conflict-affected markets, are sharply eroding household purchasing power and forcing negative coping strategies such as meal reduction and borrowing. Seasonal pressures, displacement, and flooding risks are expected to further expand Crisis and Emergency conditions from June onward, compounded by rising fuel and fertiliser costs linked to global supply disruptions, suggesting that acute food insecurity will remain widespread through at least September 2026 without a significant improvement in security and humanitarian access.

Food Trade and Crisis Response Updates

Highlights of African Governments' Responses to the Crisis

- **Regional (ECOWAS) response:** ECOWAS Ministers agreed on immediate actions including mapping fertilizer stocks, suspending customs duties, regional procurement with subsidies, and mobilizing financing, alongside medium- and long-term strategies such as fertilizer reserves, emergency funds, farmer training, and development of a regional fertilizer industry using green ammonia and local phosphates.
- **West Africa country actions:** Burkina Faso is continuing large-scale fertilizer subsidies (60,000 MT for 2026–27) but faces a remaining supply gap of about 115,000 MT, prompting calls for urgent public–private coordination; Ghana plans limited free fertilizer distribution (20,000 MT), creating uncertainty for private suppliers; Mali has fixed subsidized prices for mineral and organic fertilizers to support ambitious 2026 production targets.
- **East Africa focus on alternatives:** Ethiopia, Kenya, and Malawi are emphasizing organic, organomineral, and regenerative approaches, such as compost, biochar blends, biological nitrogen fixation, and soil health trials, while also relying on existing inorganic fertilizer stocks and exploring local fertilizer production.
- **Large market stabilization efforts:** Nigeria is prioritizing market stabilization by boosting domestic production of fuel and fertilizers, while Kenya is scaling regenerative agriculture practices and supporting local production of organic and blended fertilizers through research institutions and private firms.
- **Southern Africa emergency and resilience measures:** Mozambique is implementing short-term emergency actions to address disaster impacts and rising energy costs (fuel subsidies and tax reductions), while investing in longer-term projects such as the AfDB-funded USD 22.8 million Rice Value Chain and Climate Resilience Project to reduce import dependence and strengthen food security.

Food Trade Updates

- Tanzania has secured a \$2.33 billion syndicated loan arranged by Standard Chartered to advance its flagship Standard Gauge Railway, helping finance key sections of the planned 1,219-km line linking Dar es Salaam to Mwanza and strengthening trade corridors between the coast and inland regions. Once completed, the railway is expected to cut logistics costs, position Dar es Salaam as a regional trade gateway, and boost trade with landlocked neighbours including Rwanda, Uganda, Burundi and the DR Congo, reflecting Africa's broader push to modernise transport networks under AfCFTA.
- The government of Burkina Faso has suspended the import of rice to support the sale of domestically produced rice. The measure takes effect immediately and will remain in force until further notice.
- Nigeria has banned imports of 17 categories of goods from non-ECOWAS countries effective April 1, 2026, under revised fiscal and tariff measures that also introduce an Import Adjustment Tax on 192 tariff lines, a green tax on vehicles from July 1, 2026, and phased tariff reductions aligned with AfCFTA commitments through 2036. The policy also includes a 90-day grace period for existing contracts and reduced duties on 127 critical items. The Nigerian government has also reduced rice import tariffs on bulk rice above 5 kg to 47.5% from 70% and reduced broken rice duty to 30% from 70%. This is a new measure under its 2026 fiscal policy document as trade routes face pressure in the midst of the US–Iran war.

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 summarises trends in the number of people experiencing IPC/CH Phase 3+ or Equivalent (Figure 1) and tracks average changes in food prices over the past year (Table 1 and Figure 2) in April 2026 across 17 countries in Eastern, Southern, and Western Africa.

In April 2026, the number of people experiencing IPC/CH Phase 3+ or Equivalent is highest in Nigeria (34.8 million), followed by the DRC (26.3 million) and Sudan (19.1 million).¹ On the flip side, it is lowest in Benin (201.9k), Tanzania (241.6k), Togo (332.1k), and Namibia (407.9k).

Table 1 below shows diverging commodity price trends across regions over the past six and twelve months, with broad and sustained maize price declines across West Africa contrasting with sharper and more persistent increases in parts of East Africa. Countries such as Ghana (-31.2% over six months; -54.3% year-on-year), Nigeria (-20.6%; -40.8%), Niger (-13.9%; -41.7%) and Burkina Faso (-13.3%; -32.4%) recorded steep and continued declines, indicating easing domestic markets linked to improved supplies. In contrast, Ethiopia (+38.9%; +60.4%), Uganda (+35.1% over six months) and South Sudan (+18.8%; +35.9%) experienced pronounced and sustained price increases, reflecting persistent supply constraints and macroeconomic pressures. Southern Africa shows mixed dynamics: Malawi (-26.6%; -1.6%) and Zimbabwe (-3.7%; -15.5%) continued to see falling prices, while Zambia (+23.5% over six months despite a -17.3% annual decline) and Mozambique (+3.5% but -8.6% year-on-year) point to recent upward momentum after longer-term easing. Overall, the data highlight improving price conditions in most West African markets, while East Africa remains the main hotspot of sustained commodity price pressure, with South Sudan standing out for high inflation persistence despite some earlier volatility.

Table 1: Changes in Commodity Prices (Local Currency)

Country	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	-13.31 ↓	-32.41 ↓
Ethiopia	38.86 ↑	60.36 ↑
Ghana	-31.16 ↓	-54.33 ↓
Kenya	2.84 ↑	5.05 ↑
Malawi	-26.56 ↓	-1.61 ↓
Mali	-7.49 ↓	-25.96 ↓
Mozambique	3.47 ↑	-8.58 ↓
Niger	-13.89 ↓	-41.74 ↓
Nigeria	-20.62 ↓	-40.75 ↓
Rwanda	-1.58 ↓	16.50 ↑
South Sudan	18.78 ↑	35.93 ↑
Tanzania	14.29 ↑	-3.03 ↓
Togo	-6.75 ↓	-29.75 ↓
Uganda	35.10 ↑	
Zambia	23.53 ↑	-17.26 ↓
Zimbabwe	-3.66 ↓	-15.53 ↓

Key: ● No Change ↑ Increase ↓ Decrease

Figure 1: People in IPC/CH Phase 3+ or Equivalent (millions)

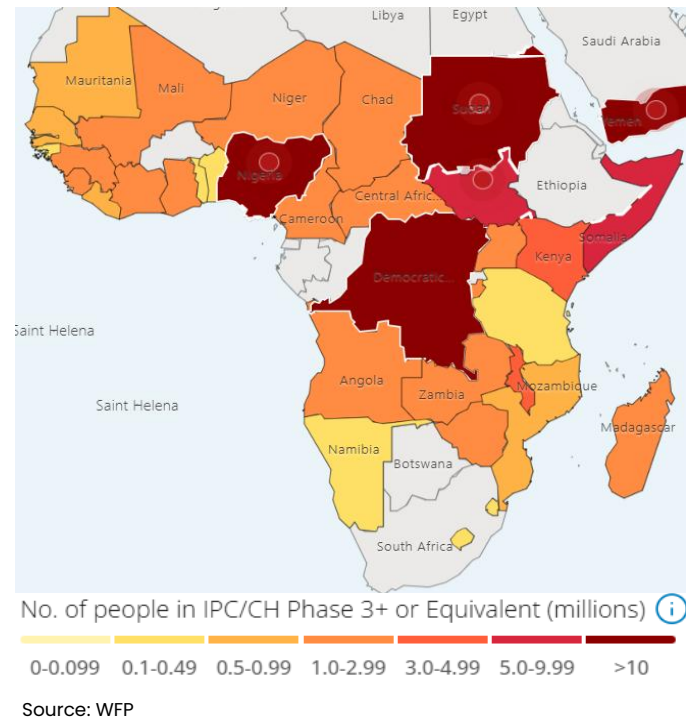


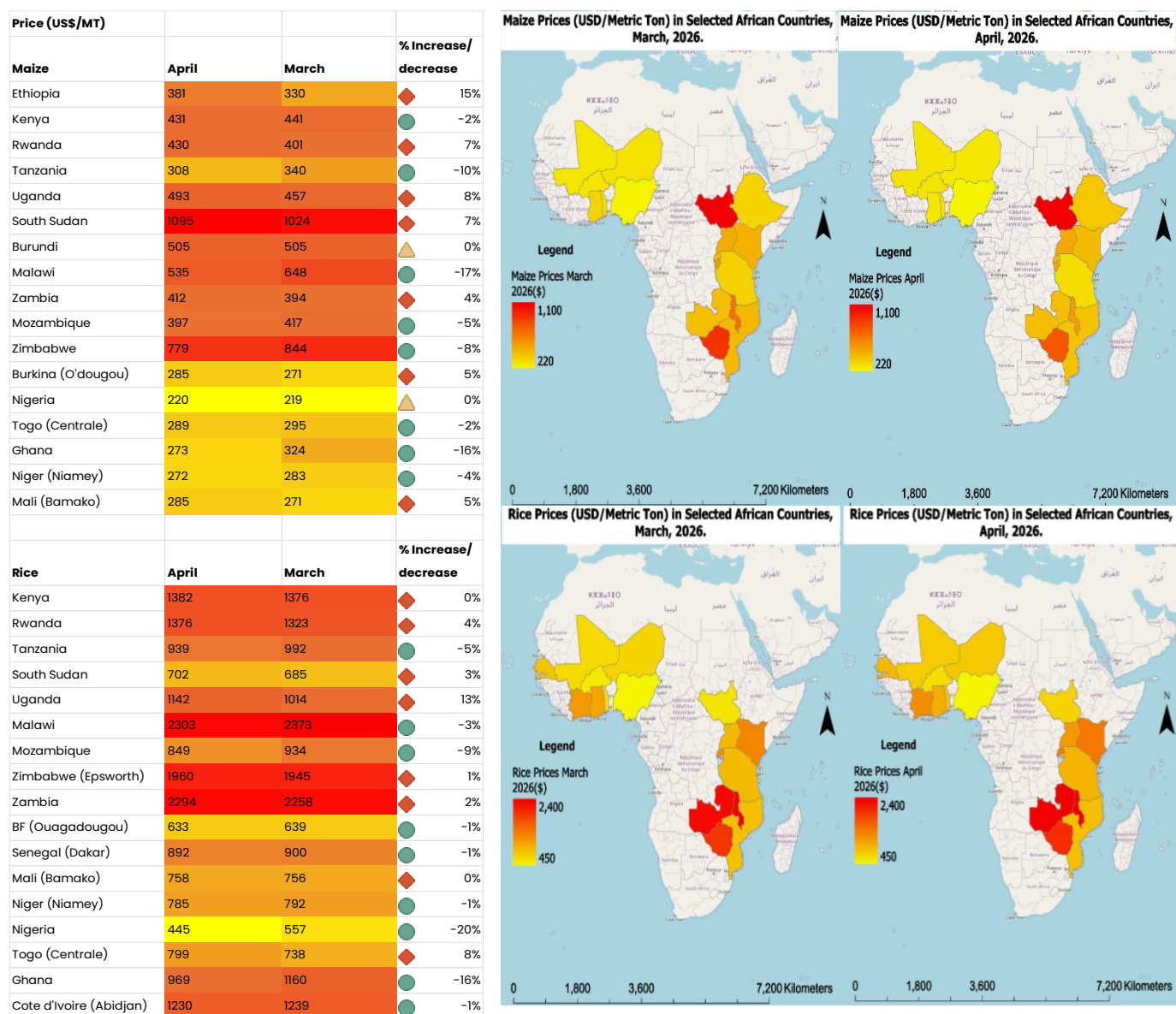
Figure 2 presents maize and rice prices in United States Dollar for March and April 2026, showing notable variations across monitored countries. In April, maize prices across the region showed mixed movements, with the highest levels recorded in South Sudan at USD 1,095/MT, reflecting continued market tightness and a 7% increase from March. This

¹ WFP Hunger Map Live Most Recent Estimation of Population in Crisis or above

was followed by Zimbabwe (USD 779/MT) and Malawi (USD 535/MT), although both countries registered notable month-on-month declines of 8% and 17% respectively, indicating easing supply pressures. In contrast, the lowest maize prices were observed in Nigeria (USD 220/MT), Ghana (USD 273/MT), and Niger (USD 272/MT), with Ghana experiencing one of the sharpest monthly drops at 16%, likely reflecting improved availability. Elsewhere, prices rose moderately in Ethiopia (+15%), Uganda (+8%), and Rwanda (+7%), while stability was evident in Burundi and Nigeria (0%).

Rice markets also displayed wide regional disparities in April. Malawi recorded the highest rice price at USD 2,303/MT, followed by Zambia (USD 2,294/MT) and Epsworth, Zimbabwe (USD 1,960/MT), underscoring persistent structural tightness despite modest month-on-month changes of -3%, +2%, and +1%, respectively. At the lower end, Nigeria had the lowest rice price at USD 445/MT, posting a steep 20% decline from March, followed by Ouagadougou, Burkina Faso (USD 633/MT) and South Sudan (USD 702/MT). Significant decreases were also recorded in Ghana (-16%), Mozambique (-9%), and Tanzania (-5%), while prices remained broadly stable in Kenya, Mali, and Niger, suggesting localized improvements in supply or reduced import pressures.

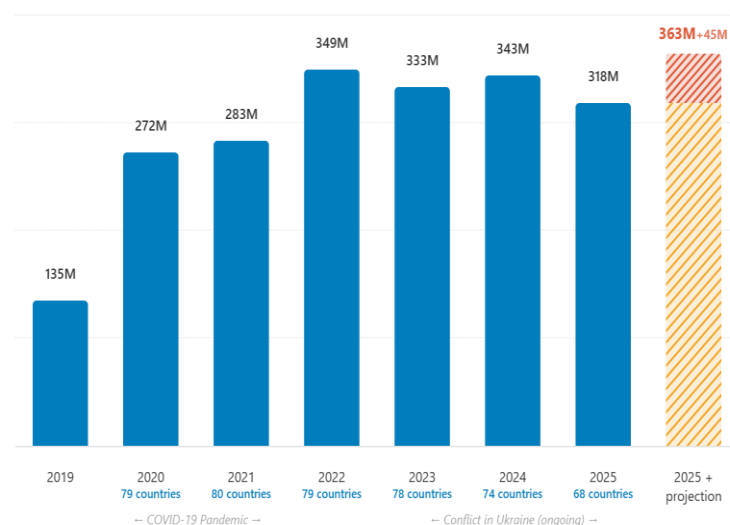
Figure 2: The Prices of Maize and Rice Across All Monitored Countries (USD/MT)



Global Market Update

Global Food Security Outlook

Figure 3: Most Recent Estimation of Population in Crisis or above



Source: WFP

Global food insecurity remains persistently high, with acute hunger concentrated in conflict-affected and climate-vulnerable regions.² Millions of people across Sub-Saharan Africa, the Middle East, and parts of South Asia continue to face severe food consumption gaps, driven primarily by armed conflict, economic instability, and displacement. Countries experiencing active conflict such as Sudan, Yemen, and parts of the Sahel consistently rank among the most food-insecure, underscoring conflict as the leading driver of acute hunger worldwide. This is further compounded by the growing role of climate shocks. Increasing frequency and intensity of droughts, floods, and erratic rainfall are undermining agricultural production, particularly in fragile and low-income settings. WFP estimates that additional 45 million

people can no longer afford a basic food basket due to inflation, adding to the 318 million already acutely food insecure before the conflict.

Sub-Saharan Africa faces some of the most severe food insecurity risks globally, with the largest numbers of acutely food-insecure people concentrated in Sudan (21–25 million), the Democratic Republic of the Congo (around 25 million), Nigeria (20–26 million), and Ethiopia (16–20 million).³ Nigeria has the largest number of people classified in IPC/CH Phase 3+ or equivalent phase. In these countries, prolonged conflict, large-scale displacement, high food prices, and repeated climate shocks have sharply eroded livelihoods and access to food, pushing millions into Crisis or worse levels of hunger. Smaller but extremely severe crises persist in South Sudan (7–9 million people), Somalia (6–7 million), Burkina Faso (around 5 million), and Mali (3–4 million), where a combination of insecurity, climate stress, and limited humanitarian access continues to drive acute hunger. Overall, while absolute needs are highest in the largest countries, the intensity of food insecurity relative to population size is greatest in fragile, conflict-affected states, underscoring the central role of conflict, climate extremes, and economic fragility in shaping hunger risks across the region.

Global Food Commodity Price Trends

The FAO Food Price Index (FFPI) rose by 1.6% to an average of 130.7 points in April 2026, marking the third consecutive monthly increase, as higher prices for vegetable oils, meat and cereals more than offset declines in sugar and dairy products. The uptick reflects a mix of underlying supply-demand pressures and rising energy-related costs linked to the escalating conflict in the Middle East, which are pushing up production and transport expenses across global food markets.

As of 1st May, the International Grains Council (IGC) Grains and Oilseeds Index (GOI) indicate broadly strengthening price conditions across grain and oilseed markets. The index stands at 232.9, up nearly 5% month-on-month and 7% year-on-year, pointing to rising pressure on overall commodity prices. Maize recorded one of the strongest monthly gains (+5.5%), though its 2.4% annual increase remains modest. Wheat continued to firm, rising 3.8% on the month and 7% over the year, while barley was relatively stable short-term (+0.6%) but still 5.4% higher year-on-year. In oilseeds, soyabeans posted a sharp 5.9% monthly rise and led annual gains at +12.4%, indicating sustained demand or tighter supply. Rice remained the weakest performer annually, down 8.2% year-on-year, despite a 3% monthly increase.

Overall, the data points to short-term upward price pressure across global grain and oilseed markets, with divergence persisting across individual commodities as geopolitical effects become more pronounced.

² WFP, 2026. <https://hungermap.wfp.org/>

³ Ibid

Figure 4: FAO Food Price Index (FFPI)⁴

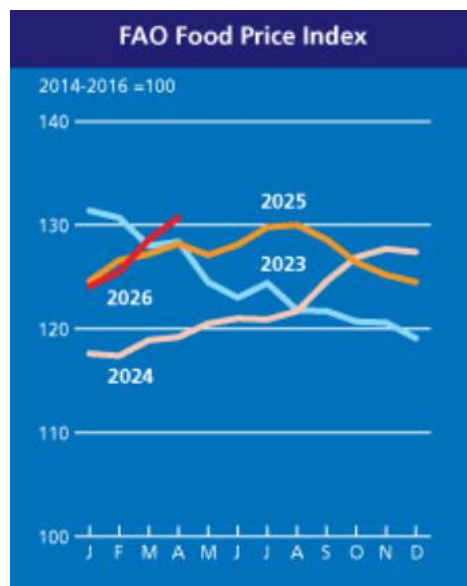


Table 2: IGC GOI Commodity Price Indices⁵

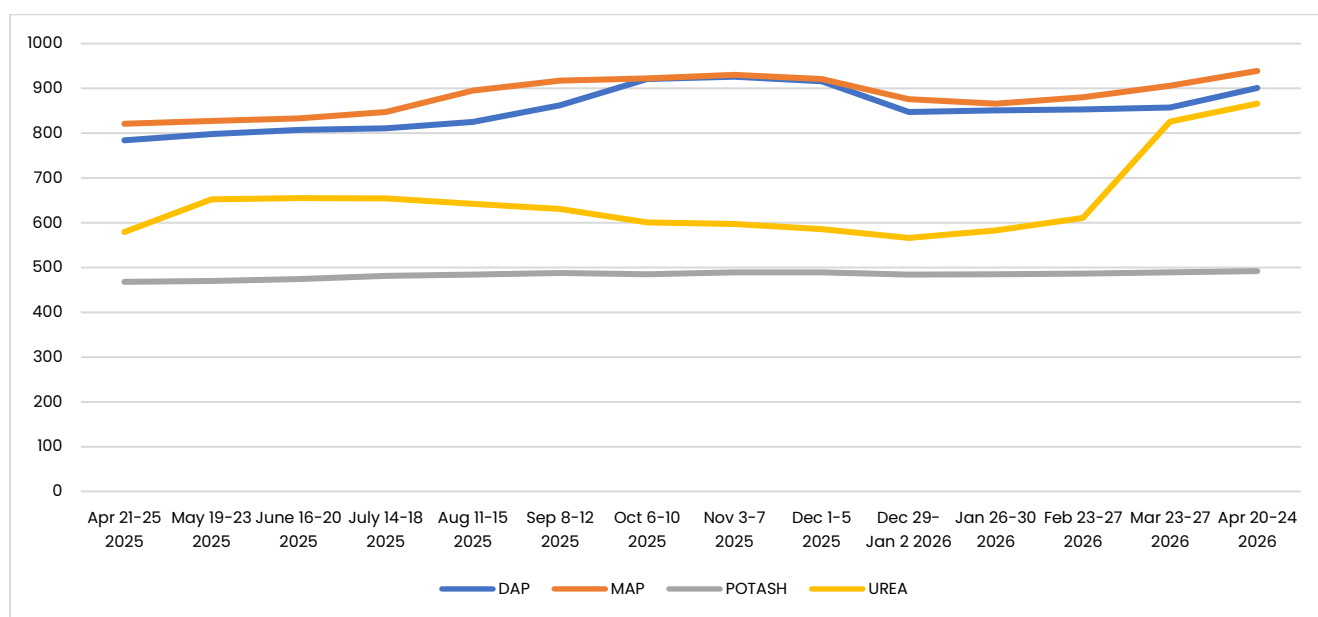
Jan 2000 = 100	01-May	% Change 1M	% Change 1Y
GOI	232.93	4.97	7.08
Wheat	216.56	3.75	6.98
Maize	239.25	5.48	2.37
Rice	162.17	3.07	-8.24
Soyabeans	228.57	5.85	12.42
Barley	246.16	0.60	5.44

Fertiliser Prices Outlook

As the U.S.–Israel–Iran conflict intensifies, global fertilizer markets are reflecting upward pressure, driven by a combination of supply disruptions, energy price shocks, and logistical constraints. Since the escalation of hostilities in late February 2026, shipping traffic through the Strait of Hormuz has dropped sharply, constraining exports from major producers such as Iran, Qatar, and Saudi Arabia and tightening global supply. At the same time, surging oil and natural gas prices, a direct consequence of the conflict, have raised production costs for nitrogen fertilizers, which rely heavily on natural gas as a feedstock. Higher insurance premiums and freight costs have further amplified price pressures.

Against this backdrop, all monitored global fertilizer prices are rising. Compared with March 2026, prices of DAP, urea, and MAP in April increased by 5.1%, 4.8%, and 3.6%, respectively. Year-on-year, gains are far more pronounced: urea prices are up the most by 49.6%, followed by DAP (14.9%), MAP (14.4%), and potash (5.1%), underscoring the cumulative impact of prolonged supply risks and elevated energy costs. Overall, the data reflects a fertilizer market increasingly shaped by geopolitical risk, with implications for farm input costs and global food price inflation if disruptions persist.

Figure 5: Dry Fertiliser Prices (\$/MT)



Source: Author's construction based on DTN⁶

⁴ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

⁵ <https://www.igc.int/en/markets/marketinfo-goi.aspx>

⁶ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2025/10/29/anhydrous-8-price-spike-one-month>

The crisis is increasingly being reflected in fertiliser markets across Africa, with prices rising in most countries where data are available. As shown in **Table 3**, fertiliser prices in Rwanda, Malawi, Mozambique and Nigeria are notably higher than levels recorded over the past 1–12 months, highlighting uneven but generally upward pressure across East, Southern and West Africa. Rwanda continues to face sustained increases, with NPK prices up 7.9% month-on-month and 33.5% year-on-year, while urea is 26.3% higher than a year ago, pointing to persistent input cost stress for farmers. Malawi and Mozambique show the sharpest escalation, particularly for urea, where prices rose by 36–58% in one month and are now about 88–90% above year-earlier levels, reflecting severe supply disruptions and high import dependence; NPK prices in the same countries increased by 2% and 118% month-on-month, and by 36% and 161% year-on-year, respectively. In Nigeria, fertiliser inflation is more moderate but still significant, with NPK prices about 17% higher than a year ago, and urea up 12.6% month-on-month and 23.5% year-on-year.

By contrast, Uganda stands out for sharp recent price declines, with DAP prices falling by 46.5% month-on-month and 43.1% over six months, alongside steep drops in NPK prices, suggesting easing domestic supply conditions or the impact of policy interventions.

Table 3: National Average Fertilizer Prices

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Rwanda	NPK	National Average USD/50kg	998.00	7.94 ↑	8.70 ↑	4.35 ▲	33.53 ✖
Rwanda	Urea	National Average USD/50kg	936.56	0.72 ▲	0.71 ▲	15.89 ✖	26.29 ✖
Uganda	DAP	National Average, Retail, UGX/Kg	4,205.38	-46.54 ↓	-45.98 ↓	-43.07 ↓	
Uganda	NPK	National Average, Retail, UGX/Kg	4,504.26	-15.42 ↓	-50.26 ↓	-11.53 ↓	
Malawi	NPK	National Average, MWK/Kg	3,449.94	1.45 ▲	-3.21 ▯	3.87 ▲	36.18 ✖
Malawi	Urea	National Average, MWK/Kg	4,598.67	36.48 ✖	31.90 ✖	41.20 ✖	88.34 ✖
Mozambique	NPK	National Average, MZN/Kg	152.39	118.10 ✖	100.91 ✖	117.81 ✖	161.24 ✖
Mozambique	Urea	National Average, MZN/Kg	110.75	58.37 ✖	74.72 ✖	74.10 ✖	89.85 ✖
Nigeria	Fertiliser_NPK	National Average, NGN/50KG	968.18	1.94 ▲	8.86 ↑	-0.10 ▯	16.94 ✖
Nigeria	Fertiliser_Urea	National Average, NGN/50KG	914.01	12.63 ↑	25.81 ✖	9.85 ↑	23.49 ✖

The Impacts of the US–Israel–Iran War on Global and African Commodity Markets

UN Trade and Development (UNCTAD) warns that the near-closure of the Strait of Hormuz since late February 2026 has rapidly escalated into a broad global economic shock, after ship transits through the vital energy corridor collapsed by about 95%, from roughly 130 vessels per day in February to just 6 in April, sharply disrupting oil and gas supplies and driving up fuel, transport and insurance costs worldwide.⁷ The resulting energy shock is slowing trade and growth, with global merchandise trade projected to decelerate from around 4.7% growth in 2025 to just 1.5–2.5% in 2026, while global GDP growth is expected to ease from 2.9% to 2.6% assuming the crisis does not worsen. Inflationary pressures are rising as higher energy and logistics costs filter through supply chains, while financial stress is intensifying as investors pull capital from developing economies, weakening currencies and raising borrowing costs. Developing countries are the most exposed, particularly those dependent on Middle East energy imports, and the shock compounds existing vulnerabilities, with about 3.4 billion people living in countries that already spend more on debt servicing than on health or education, sharply limiting their capacity to absorb further economic strain.

IFPRI and FAO identify fertiliser as the main channel through which the Iran–US conflict is transmitting shocks to global food systems, given the central role of the Strait of Hormuz, which handles an estimated 20–30% of globally traded fertilisers (including urea, ammonia and phosphates) and around 20% of liquefied natural gas (LNG). Severe shipping disruptions through the strait have driven sharp increases in nitrogen and phosphate prices, with IFPRI estimating urea prices rose by about 40% within weeks of the early-2026 escalation, while FAO projects average global fertiliser prices 15–20% higher in the first half of 2026 if disruptions persist. These pressures are compounded by elevated natural gas prices, which raise nitrogen fertiliser production costs and weaken affordability, particularly for fertilizer-import-dependent countries in Africa (Glauber et al., 2026; Torero, 2026; World Bank, 2024).

Despite these input shocks, IFPRI notes that conditions for an immediate global food price spike, such as depleted stocks, major weather shocks or widespread export bans, are largely absent, helping initially to contain grain prices. FAO data show only modest cereal price increases even as the FAO Food Price Index rose 2.4% in March 2026, largely driven by higher energy costs; however, analysts warn that persistently high fertiliser and fuel prices will feed through

⁷ <https://unctad.org/news/hormuz-disruption-deepens-global-economic-strain-across-trade-prices-and-finance>

with a lag as farmers cut application rates or shift crops, affecting yields and future supply. IMF and UNCTAD caution that if oil prices average around US\$100 per barrel or higher, transport and processing costs will rise further, increasing the risk of broader food inflation and weaker global growth in 2026–2027, with Sub-Saharan Africa particularly exposed due to heavy import dependence, currency constraints and limited fiscal space (Arita & Glauber, 2026; FAO, 2026; IMF, 2026; UNCTAD, 2026; IFPRI, 2026; WFP, 2026).

East African importers are set to face higher costs as conflict-linked disruptions in the Gulf push up fuel prices and transport charges in a region where logistics are already expensive. Ferrying a container in East Africa currently costs about \$1.8 per kilometre, nearly double the global average of \$1, and this could rise to \$2.1 per kilometre as higher fuel costs are passed on, according to the Shippers Council of Eastern Africa. In Kenya, transporters have already announced rate increases of up to 14%, while Kenya Railways has introduced a fuel price adjuster that could raise rail tariffs by up to 12% if diesel prices climb beyond set thresholds. These increases, compounded by longer shipping routes and rising insurance premiums due to disruptions around the Strait of Hormuz, are expected to raise the landed cost of imported fuel, food and manufactured goods, with higher prices ultimately passed on to consumers across the region. Mozambique is also among the countries most exposed to rising food prices and living costs due to disruptions to fertiliser imports following the closure of the Strait of Hormuz, according to UN Trade and Development (UNCTAD).⁸

Several countries in East, Southern, and West Africa have experienced significant surge in fuel prices between March and April, including Mozambique (petrol 12%; diesel 46%), Rwanda (petrol 38%; diesel 12%), Tanzania (petrol 25%; diesel 22%), Kenya (petrol 14%; diesel 19%) and Malawi (petrol 26%; diesel 26%), while diesel prices are up by 22% in Zambia (Table 4). Uganda experienced the least surge in fuel prices in the region, by between 5–7%. In West Africa, Nigeria experienced 7% and 1% increases in petrol and diesel prices respectively, while Ghana experienced 13% and 20% increase in petrol and diesel prices respectively.

Table 4: Fuel Prices (in local currencies)

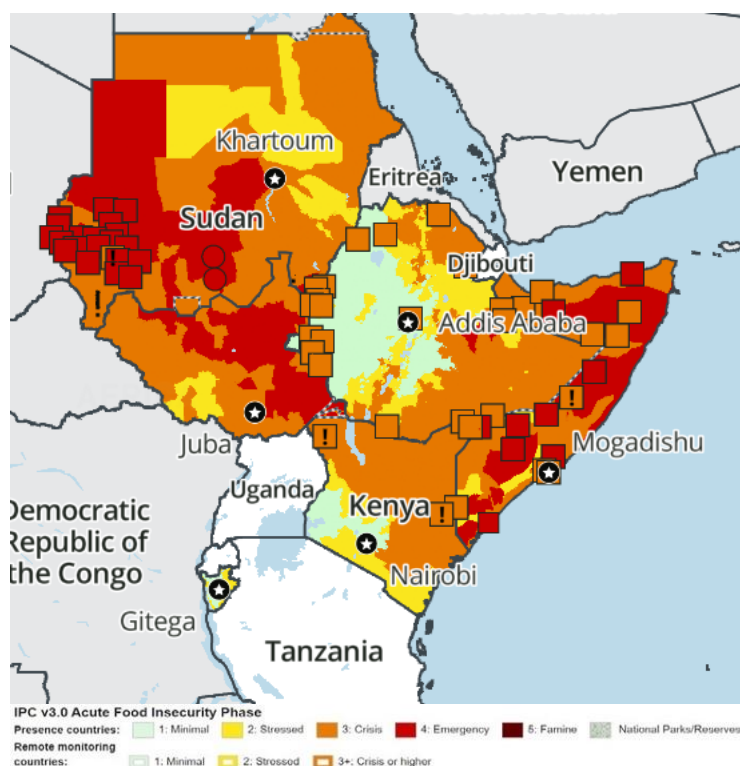
Country	March		April		Changes (%)	
	Petrol	Diesel	Petrol	Diesel	Petrol	Diesel
Kenya	178.28	166.54	206.97	206.84	14	19
Rwanda	1989	1948	2938	2205	32	12
Tanzania	2864	2858	3820	3684	25	22
Uganda	5158	4831	5428	5222	5	7
Malawi	4965	4945	6672	6687	26	26
Mozambique	82.50	62.77	93.86	116.25	12	46
Zambia	26.61	23.25	27.15	29.78	2	22
Ghana	11.57	14.35	13.3	17.85	13	20
Nigeria	1290	2010	1383	2024	7	1

⁸ <https://clubofmozambique.com/news/mozambique-among-countries-hardest-hit-by-fertiliser-import-disruption-via-strait-of-hormuz/>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 6: East African Countries Food Security Outlook, April 2026



In **Ethiopia**, food security conditions remain critical, with Emergency (IPC Phase 4) outcomes persisting in several areas due to conflict, displacement, high prices, and weak livelihoods.⁹ In East Hararghe lowlands, Emergency conditions are expected to continue through May, easing to Crisis (IPC Phase 3) after the June belg harvest, though serious food consumption gaps and acute malnutrition will remain, while assistance in Babile woreda is currently preventing worse outcomes. Newly arrived South Sudanese refugees in Gambela face ongoing Emergency conditions marked by critical malnutrition and limited access to aid, as insecurity, fuel shortages, and likely pipeline breaks increasingly disrupt assistance delivery. At the same time, widespread Crisis outcomes are expected to persist across eastern Tigray, northeastern Amhara, northern Afar, and the pastoral south and southeast, with some households deteriorating to Emergency, driven by conflict-related disruptions, fuel shortages linked to Middle East developments, elevated food prices, rainfall deficits in parts of Somali Region, and weak

livestock productivity sustaining food consumption gaps and malnutrition risks.

In **Kenya**, the long rains are expected to bring gradual improvement in the food security situation despite Crisis (IPC Phase 3) outcomes persisting across pastoral, marginal agricultural, and refugee-hosting areas.¹⁰ In pastoral areas, low herd sizes, limited forage regeneration, and sustained high food prices continued to suppress livestock productivity, milk availability, incomes, and purchasing power, pushing some worst-affected households into Emergency (IPC Phase 4). In marginal agricultural zones, depleted food stocks after successive poor seasons and elevated staple prices sustained Crisis outcomes in areas such as Lamu, Kitui, Makueni, and Meru North, while Stressed (IPC Phase 2) conditions prevailed elsewhere despite seasonal farm labour income. Refugee populations in Kakuma, Dadaab, and Kalobeyei remained largely in Crisis (IPC Phase 3!), with reliance on food assistance constrained by limited coverage of non-food needs. Nationwide, high staple food prices, constrained incomes, and emerging risks from Middle East conflict—through higher fertilizer, fuel, and import costs—continued to undermine food access, suggesting that widespread food insecurity would persist through the early part of the long rains season.

According to the latest East and Central Africa Food and Nutrition Working Group (FNSWG) report, on 30th April, the food security situation in **South Sudan** has deteriorated beyond September 2025 IPC projections, with 7.8 million people facing acute food insecurity (IPC Phase 3+) between April and July 2026, an increase of 280,000 people. This includes 73,000 in IPC Phase 5 (Catastrophe) and 2.5 million in IPC Phase 4 (Emergency). The nutrition situation is equally critical, with 2.2 million children aged 6–59 months requiring treatment, 90,000 more than previously estimated. Conflict, displacement, access constraints, high food prices, disease outbreaks, poor WASH conditions, and funding shortfalls are driving the crisis, which is expected to worsen without additional resources and sustained access.

In **Uganda**, food insecurity remains severe in Karamoja, refugee settlements, and host communities, driven by poor harvests, reduced humanitarian assistance, and limited livelihood opportunities. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) conditions are expected to persist through early 2026 unless assistance is scaled up and livelihood support significantly expanded.¹¹

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

¹⁰ <https://fews.net/east-africa/kenya>

¹¹ East and Central Africa Food Security & Nutrition Working Group April Report

Commodity Prices

Key drivers of commodity prices in EA

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

Maize

Figure 7: National average price spreads for maize across select East African Countries¹²

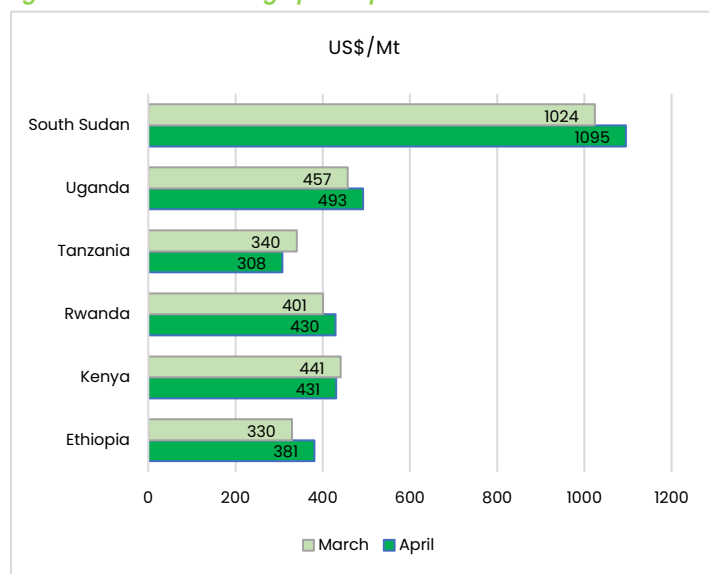


Figure 7 presents maize prices (USD/metric tonne) across six Eastern African countries, highlighting month-on-month changes between March and April and revealing pronounced volatility in several markets. The most significant upward movements were recorded in **Ethiopia**, where prices surged from USD 330/MT to USD 381/MT (+15%), and **Uganda**, which rose from USD 457/MT to USD 493/MT (+8%), reflecting exchange-rate pressures, tightening seasonal availability, and strong regional demand. **South Sudan**, already the highest-priced market, also experienced a notable increase from USD 1,024/MT to USD 1,095/MT (+7%), underscoring persistent structural supply constraints and high transaction costs.

On the downside, **Tanzania** exhibited the sharpest decline, with prices falling from USD 340/MT to USD

308/MT (-9%), reflecting improved market supply following the completion of the *Vuli* secondary season harvests. **Rwanda** also recorded a sizeable increase (USD 401/MT to USD 430/MT, +7%), pointing to localized post-harvest tightening, while **Kenya's** market remained relatively stable, registering only a modest decline from USD 441/MT to USD 431/MT (-2%) amid expectations of improved domestic production.

Table 5 summarizes maize prices in local currencies across East African countries, highlighting significant divergence across short-, medium-, and long-term horizons. Month-on-month, sharp increases were observed in Ethiopia (+16.6 percent), Uganda (+7.1 percent), South Sudan (+7.0 percent), and **Rwanda** (+7.4 percent), indicating tightening market conditions driven by post-harvest supply constraints, sustained regional demand, and underlying structural inefficiencies. In contrast, Kenya (-2.9 percent) and Tanzania (-8.6 percent) recorded notable declines, reflecting improved short-term availability and easing market pressures.

Despite these short-term fluctuations, maize prices remain elevated year-on-year across most markets, with particularly sharp increases in **Ethiopia** (+60.4 percent), **South Sudan** (+35.9 percent), and **Uganda** (+35.1 percent), reflecting persistent structural and macroeconomic pressures, including currency depreciation, high transport costs, and chronic supply deficits. Over the past three months, prices increased markedly in Uganda (+33.7 percent), Ethiopia (+30.4 percent), and South Sudan (+16.1 percent), while Tanzania (-11.1 percent) and Rwanda (-3.0 percent) recorded declines, indicating relatively improved supply conditions in the latter markets. In contrast, **Kenya** (-2.9 percent) and **Tanzania** (-8.6 percent) recorded notable declines, reflecting improved short-term availability and easing market pressures.

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

Table 5: Percentage changes in maize prices in East Africa¹³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	5,974.29	16.60 ⬇	30.35 ⬇	38.86 ⬇	60.36 ⬇
Kenya	Maize	National Average, Retail, KES/KG	55.29	-2.94 ⬇	-5.52 ⬇	2.84 ⬆	5.05 ⬆
Rwanda	Maize	National Average, Retail, RWF/Kg	626.16	7.39 ⬆	-2.96 ⬇	-1.58 ⬇	16.50 ⬇
South Sudan	Maize (white)	National Average, Retail, SSP/Kg	4,977.09	6.96 ⬆	16.05 ⬇	18.78 ⬇	35.93 ⬇
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	80,000.00	-8.57 ⬇	-11.11 ⬇	14.29 ⬆	-3.03 ⬇
Uganda	Maize	National Average, Retail, UGX/Kg	1,824.27	7.10 ⬆	33.72 ⬇	35.10 ⬇	

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 8: National average price spreads for rice across select East African Countries¹⁴

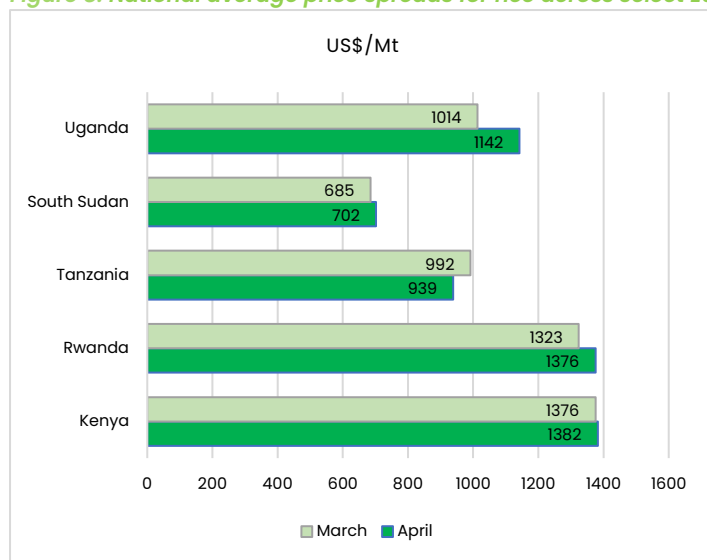


Figure 8 presents rice prices (in USD per metric tonne) across five Eastern African countries, with Kenya and Rwanda remaining the highest month-on-month priced rice markets in the region. **Kenya** recorded a marginal increase, with prices edging up from USD 1,376/MT to USD 1,382/MT (+0.4%), reflecting continued reliance on imports and firm domestic demand. **Rwanda** also posted an increase, rising from USD 1,323/MT to USD 1,376/MT (+4%), suggesting localized supply tightening and sustained consumer demand.

Similarly, **Uganda** experienced one of the most notable increases, with rice prices climbing from USD 1,014/MT to USD 1,142/MT (+13%), underscoring increasing domestic demand and active regional pressure. **South Sudan** recorded a moderate increase, with prices rising from USD 685/MT to USD 702/MT (+2%), consistent with high

transaction costs and continued dependence on cross-border inflows. In contrast, **Tanzania** registered a clear price decline, with rice prices falling from USD 992/MT to USD 939/MT (-5%), indicating improved market availability and easing supply pressures following recent inflows.

Table 6 shows mixed short-term movements in local-currency rice prices across East Africa, reflecting varying supply conditions and market structures. Month-on-month, the largest increases were observed in Uganda (Kaiso +12.0 percent), **South Sudan** (+7.4 percent), and Rwanda (+4.1 percent), reflecting tightening supply conditions and strong demand in structurally deficit markets. In contrast, Tanzania (-4.3 percent) and **Kenya** (Pishori -0.2 percent) recorded declines, while Kenya's Komboka variety remained broadly stable (+0.1 percent), indicating relatively balanced short-term availability.

Despite these short-term movements, rice prices remain elevated across several markets over longer horizons. **Rwanda** stands out with sustained increases of +9.5 percent (three months), +25.5 percent (six months), and +33.7 percent year-on-year, reflecting persistent market structural constraints and high transaction costs. **Uganda** also recorded notable medium-term increases, particularly for Kaiso rice (+14.6 percent over three months and +21.3 percent over six months), indicating strong demand for specific quality segments. **Tanzania** shows moderate medium-term pressure (+8.4 percent over six months) despite recent monthly declines, while Kenya remains relatively stable year-on-year (Komboka +4.1 percent; Pishori -2.9 percent), suggesting contained inflationary pressures.

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

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

Table 6: Percentage changes in rice prices in East Africa¹⁵

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice_komboka	National Average, Retail, KES/KG	125.08	0.05 ▲	1.23 ▲	-1.05 ▾	4.07 ▲
Kenya	Rice_pishori	National Average, Retail, KES/KG	177.25	-0.21 ▾	-1.65 ▾	-0.52 ▾	-2.93 ▾
Rwanda	Rice	National Average, Retail, RWF/Kg	2,005.05	4.11 ▲	9.52 ▲	25.52 ☒	33.67 ☒
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	244,000.00	-4.31 ▾	-4.31 ▾	8.44 ▲	-0.41 ▾
Uganda	Rice_kaiso	National Average, Retail, UGX/Kg	4,229.17	12.01 ▲	14.60 ▲	21.31 ☒	
Uganda	Rice_super	National Average, Retail, UGX/Kg	4,772.98	1.15 ▲	1.39 ▲	-0.91 ▾	

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 9: National average price spreads for beans across select East African Countries¹⁶

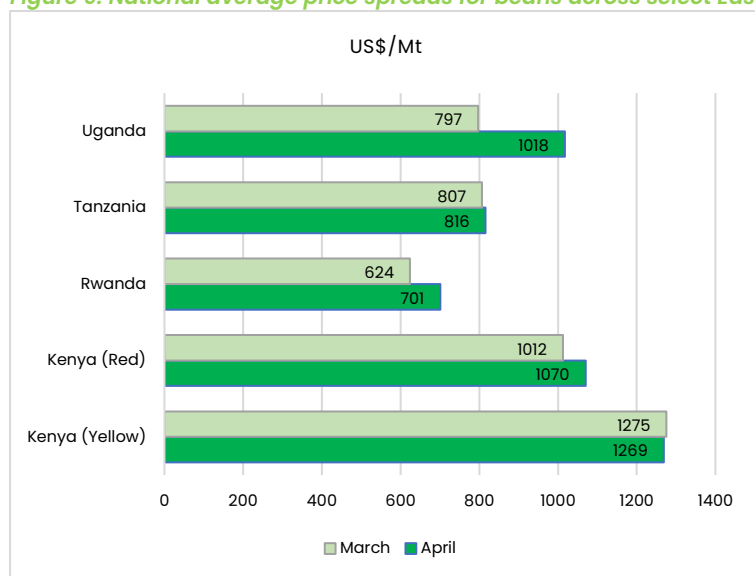


Figure 9 presents beans prices (in USD per metric tonne) across selected Eastern African markets, with all countries experiencing upward price pressures month-on-month. **Kenya** maintains the highest-priced market for beans, particularly for yellow beans, despite a slight decline from USD 1,275/MT to USD 1,269/MT (-0.5%). In contrast, the country's red beans recorded a notable increase, rising from USD 1,012/MT to USD 1,070/MT (+6%), suggesting increased market preference.

Uganda experienced the sharpest price increase among the monitored markets, with bean prices climbing from USD 797/MT to USD 1,018/MT (+28%), reflecting tightening domestic supplies and possibly heightened regional demand following the conclusion of seasonal green harvests. **Tanzania**

recorded a modest increase, with prices edging up from USD 807/MT to USD 816/MT (+1%), pointing to broadly stable supply conditions with slight upward pressure. **Rwanda**, while remaining the lowest-priced market, experienced a notable price surge—from USD 624/MT to USD 701/MT (+12 percent)—consistent with seasonal supply tightening and increased market demand.

Table 7 illustrates local-currency bean prices across East African markets, highlighting significant price divergence across the markets. Month-on-month, the largest increases were observed in Uganda (+26.9 percent), Rwanda (+12.5 percent), and Kenya (Wairimu +5.0 percent), reflecting tightening supply conditions and strong demand pressures. Tanzania (+2.2 percent) recorded a modest increase, while Kenya (Yellow -1.2 percent) posted a slight decline, indicating relatively stable short-term availability.

Despite these short-term movements, bean prices show pronounced divergence over longer horizons. **Uganda** stands out with sustained and significant increases (+30.1 percent over three months and +37.6 percent over six months), reflecting persistent supply constraints and strong demand. **Rwanda** also recorded notable volatility, with a sharp rise over three months (+16.6 percent) followed by a decline over six months (-2.9 percent). Year-on-Year, **Kenya** (Wairimu +15.3 percent) continues to show upward pressure, while **Tanzania** (-22.9 percent), Rwanda (-5.7 percent), and Kenya (Yellow -4.8 percent) recorded notable year-on-year declines, indicating relatively improved supply conditions compared to the previous year.

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

¹⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 7: Percentage changes in bean prices in East Africa¹⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans_wairimu	National Average, Retail, KES/KG	137.21	4.98 ▲	6.93 ↑	8.88 ↑	15.34 ⊗
Kenya	Beans_yellow	National Average, Retail, KES/KG	162.73	-1.19 ▾	-1.14 ▾	-1.60 ▾	-4.83 ▾
Rwanda	Beans	National Average, Retail, RWF/Kg	1,021.52	12.53 ↑	16.57 ⊗	-2.94 ▾	-5.65 ↓
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	212,000.00	2.17 ▲	-7.83 ↓	-2.53 ▾	-22.91 ↓
Uganda	Beans	National Average, Retail, UGX/Kg	3,768.06	26.88 ⊗	30.07 ⊗	37.63 ⊗	

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%)

Wheat

Figure 10: National average price spreads for wheat across select East African Countries

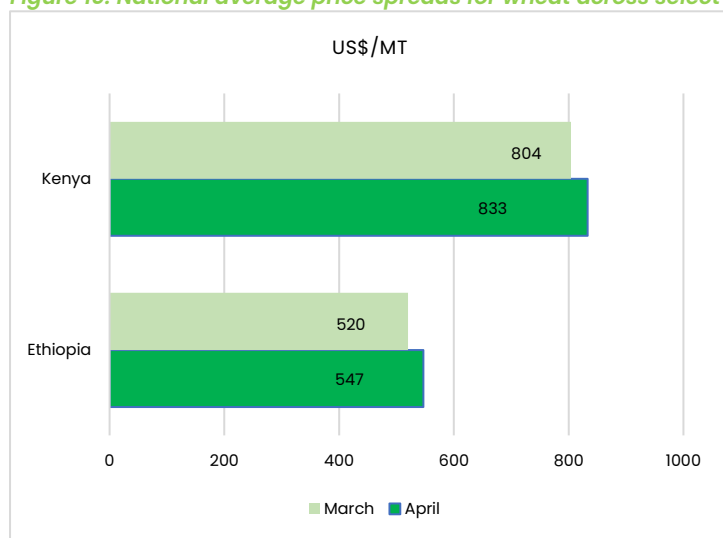


Figure 10 presents wheat prices (in USD per metric tonne) across Kenya and Ethiopia, highlighting month-on-month changes between March and April. **Kenya** remained the higher-priced wheat market, with prices increasing from USD 804/MT to USD 833/MT (+4%), reflecting continued reliance on imports, firm miller demand, and elevated international prices. **Ethiopia** also recorded a notable increase, with wheat prices rising from USD 520/MT to USD 547/MT (+5%), likely driven by seasonal market tightening and currency pressures, rising fuel costs and continued insecurity in the north.

Table 8 summarises wheat prices in local currencies across two select East African countries, indicating a clear upward bias across most time horizons, with

stronger inflationary pressure in Ethiopia and more moderate but persistent firming in Kenya. In **Ethiopia**, wheat prices recorded a notable month-on-month increase of 6.1%, reflecting firm consumer demand and ongoing inflationary pressures. Prices also rose strongly over the three-month period (+9.9%) and continued to increase over six months (+3.0%), suggesting sustained upward momentum. On a year-on-year basis, prices are 13.9% higher, underscoring persistent structural and macroeconomic pressures, including currency effects and rising production and marketing costs. In **Kenya**, wheat prices also trended upward, though at a more moderate pace. Prices increased by 2.9% month-on-month and rose 5.1% over three months, indicating continued upward pressure linked to import dependence and exposure to international price movements. Over six months, prices increased by 2.4%, while year-on-year prices are up 6.2%, pointing to steady but contained inflationary pressure relative to Ethiopia.

Table 8: Percentage changes in wheat prices in East Africa¹⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,578.57	6.13 ↑	9.88 ↑	3.01 ▲	13.92 ↑
Kenya	Wheat	National Average, Retail, KES/KG	106.85	2.91 ▲	5.09 ↑	2.42 ▲	6.18 ↑

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%)

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

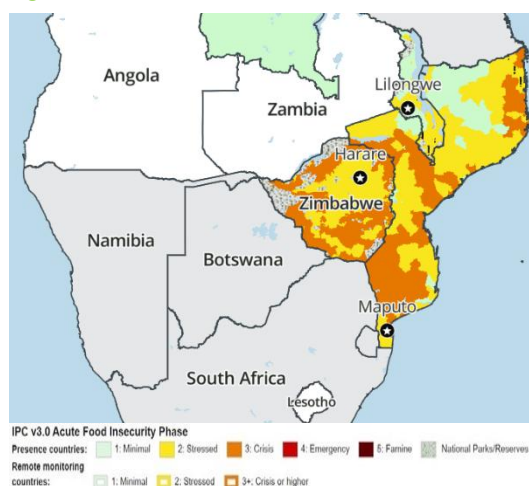
¹⁸ Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

Seasonal Monitor and Cropping Conditions¹⁹

In **Eastern Africa**, the planting and development of *Belg* and main-season cereals are progressing under generally favorable conditions, supported by earlier forecasts of average to above-average rainfall through June, which are expected to further enhance crop performance. In **Ethiopia**, *Belg*-season maize is currently in the vegetative to reproductive stages, with harvesting expected from June. Overall crop conditions remain favorable, supported by above-average cumulative rainfall across key *Belg*-growing areas. In **Kenya**, rice and long-rains cereal crops are developing under generally favorable conditions, supported by an early onset of above-average March–May rainfall. However, a potential shift to El Niño conditions may reduce rainfall performance between June and September, particularly in key western production areas. In **Uganda**, planting and development of main-season cereals is ongoing, with some central and western areas facing dry-condition constraints; however, expected average March–May rains are likely to support overall crop development. In **Rwanda** and Burundi, Season B maize crops are at vegetative to reproductive stages, with conditions placed under watch following recent below-normal rainfall, though impacts remain mixed. In **Burundi**, Season B rice planting continues under favorable conditions. Finally, **Tanzania**, *Masika* and *Msimu* crops are currently in the vegetative to reproductive stages, with overall crop conditions remaining favorable across the country.

Southern Africa Food Security Update

Figure 11: Southern Africa Countries Food Security Outlook, April 2026



In April, **Malawi's** food security situation showed seasonal improvement but lingering vulnerability, particularly in the southern region. The start of the 2026 harvest increased access to own-produced food, farm labour income, and crop sales, supporting Minimal (IPC Phase 1) outcomes across much of the central and northern regions. However, Stressed (IPC Phase 2 and Phase 2!) conditions persisted in southern and parts of central Malawi, reflecting weak household purchasing power, recovery constraints after consecutive climate shocks, and continued reliance on coping strategies, even where food assistance is mitigating consumption gaps. Although generally favourable rainfall supported good maize production and prices stabilized ahead of harvest, localized flood damage affected livelihoods for over 300,000 people, while persistently high food prices, elevated inflation, and emerging risks from rising fuel and fertilizer costs linked to Middle East conflict continue to constrain household resilience and non-food spending.

Mozambique's food security situation remained severely constrained, with Crisis (IPC Phase 3) outcomes prevailing across flood- and drought-affected areas in the south and center, as well as in conflict-affected districts of Cabo Delgado and northern Nampula. While the onset of the main harvest in April–May is expected to provide some temporary relief, improvements are limited by successive climate shocks—floods, prolonged dry spells, and cyclones that have caused extensive crop and livestock losses, reduced household food stocks, and curtailed income-earning opportunities. Poor households continue to rely heavily on markets despite weak purchasing power and above-average staple food prices, particularly in the south, and are employing consumption-based coping strategies such as reducing meal size and frequency. Ongoing insecurity in the north, limited access to agricultural inputs, slow recovery in flood-affected areas, and constrained humanitarian capacity further undermine food access, suggesting that Crisis conditions will persist for many vulnerable households despite localized improvements elsewhere.

In April, **Zimbabwe's** food security situation began to improve with the start of the 2026 harvest, leading to Stressed (IPC Phase 2) outcomes in deficit-producing areas and Minimal (IPC Phase 1) outcomes in typical surplus zones. However, below-average harvests in areas affected by excessive rainfall and prolonged dry spells during the 2025/26 season mean some households are expected to deplete their food stocks early and rely more heavily on markets. Rising prices for food, fuel, and fertilizer, driven by higher production and transport costs, are constraining household purchasing power in both rural and urban areas, while key income sources such as crop sales, tobacco earnings, and casual labour remain below average. These pressures are partially offset by favourable water and pasture conditions, which are supporting good livestock productivity and related incomes, as well as other livelihood activities such as horticulture and construction.

¹⁹ Crop Monitor No. 115 – May 2026: [EarlyWarning_CropMonitor_202605.pdf](#)

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 12: National average price spreads for maize across select Southern African Countries²⁰

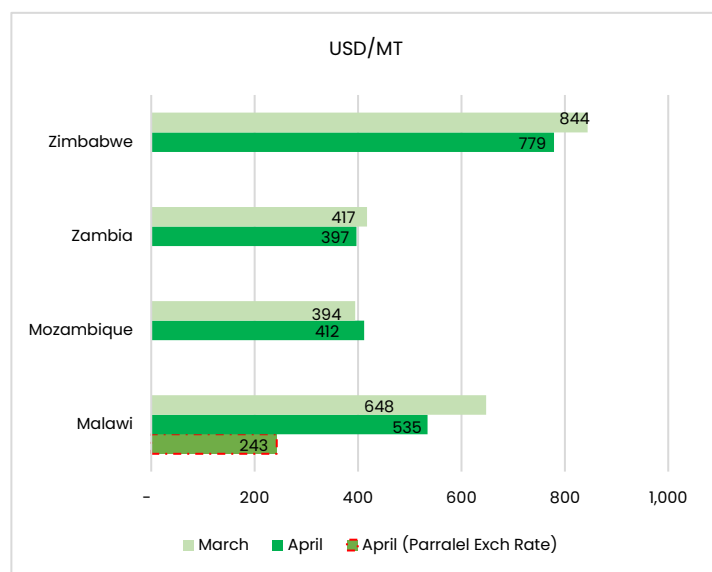


Figure 12 illustrates maize price movements (in USD per metric tonne) across Zambia, Mozambique, and Malawi, illustrating divergent price movements as harvest inflows begin to influence market dynamics. **Zimbabwe** remained the highest-priced market, despite a decline from USD 844/MT to USD 779/MT (-8 percent), indicating supply pressures easing but continued structural constraints. **Malawi** recorded the sharpest adjustment, with prices falling from USD 648/MT to USD 535/MT (-17 percent), while parallel exchange rate²¹ estimates place prices at USD 243/MT, placing Malawi, under real market condition, as the lowest-priced market in the region. **Zambia** also posted a moderate decline from USD 417/MT to USD 397/MT (-5 percent), reflecting improved supply conditions, whereas **Mozambique** diverged from the regional trend, with prices increasing from USD

394/MT to USD 412/MT (+5 percent), suggesting lingering supply disruptions from effects of the floods early in the year.

Table 9 summarises maize price trends across selected Southern African markets, displaying pronounced divergence across short-, medium-, and longer-term horizons, shaped by differences in harvest timing, market integration, currency conditions, and localized supply dynamics. In **Malawi**, maize prices recorded a sharp month-on-month decline (-17.7%), reflecting improving availability as harvest inflows entered markets. This easing persisted over the three-month (-20.1%) and six-month (-26.6%) periods, confirming a sustained correction from earlier peaks. On a year-on-year basis, prices were marginally lower (-1.6%), indicating that despite recent declines, prices remain close to last year's elevated levels. **Mozambique** exhibited contrasting short- and medium-term movements. Prices increased modestly month-on-month (+4.4%), pointing to localized tightening or higher transaction costs. However, prices fell sharply over three months (-45.2%), suggesting a strong post-harvest supply response, before stabilizing over six months (+3.5%). On an annual basis, prices were significantly lower (-8.6%), reflecting improved supply conditions compared with last year.

Zambia displayed a mixed pattern, with a month-on-month decline (-5.0%) but notable increases over three (+2.7%) and six months (+23.5%), indicating underlying medium-term supply constraints and inflationary pressures. Despite this, prices remain lower year-on-year (-17.3%), reflecting strong base effects from previously elevated levels. Looking ahead, a projected second consecutive bumper harvest in 2026, supported by significant carryover stocks and a strengthening currency, is expected to keep domestic supply well above average, placing downward pressure on prices and easing inflationary pressures. In **Zimbabwe**, maize meal prices show significant spatial variation, with sharp month-on-month declines in Gweru and Bulawayo alongside modest increases in Epworth and Mutare, reflecting uneven supply conditions. Over the medium term, most markets recorded declines over three months, while six-month trends remained mixed, indicating varied supply adjustments. Despite short-term volatility, prices are

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

²¹ Parallel Exchange rate as reported from the ground is 1USD: 3,800MWK compared to Official rate of 1USD: 1724.81 MWK as of 30 April 2026

substantially lower year-on-year (-15% to -27%), signaling broad market normalization.

Table 9: Percentage changes in maize prices in Southern Africa²²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	922.06	-17.68 ↓	-20.12 ↓	-26.56 ↓	-1.61 ↘
Mozambique	Maize (white)	National Average, MZN/Kg	26.03	4.43 ▲	-45.16 ↓	3.47 ▲	-8.58 ↓
Zambia	Maize (white)	National Average, Retail, Kwacha/KG	7.50	-4.99 ↘	2.73 ▲	23.53 ✖	-17.26 ↓
Zimbabwe	Maize meal	Bulawayo, Retail, USD/Kg	0.69	-8.04 ↓	-16.24 ↓	-18.43 ↓	-27.25 ↓
Zimbabwe	Maize meal	Epworth, Retail, USD/Kg	1.02	0.49 ▲	2.41 ▲	4.62 ▲	4.62 ▲
Zimbabwe	Maize meal	Gweru, Retail, USD/Kg	0.67	-14.61 ↓	-16.21 ↓	-6.80 ↓	-17.55 ↓
Zimbabwe	Maize meal	Masvingo, Retail, USD/Kg	0.72	-2.58 ↘	-8.77 ↓	-4.39 ↘	-20.04 ↓
Zimbabwe	Maize meal	Mutare, Retail, USD/Kg	0.80	2.18 ▲	2.05 ▲	5.84 ↑	-18.49 ↓
Zimbabwe	Maize meal	National Average, USD/kg*	0.78	-4.23 ↘	-6.98 ↓	-3.66 ↘	-15.53 ↓

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

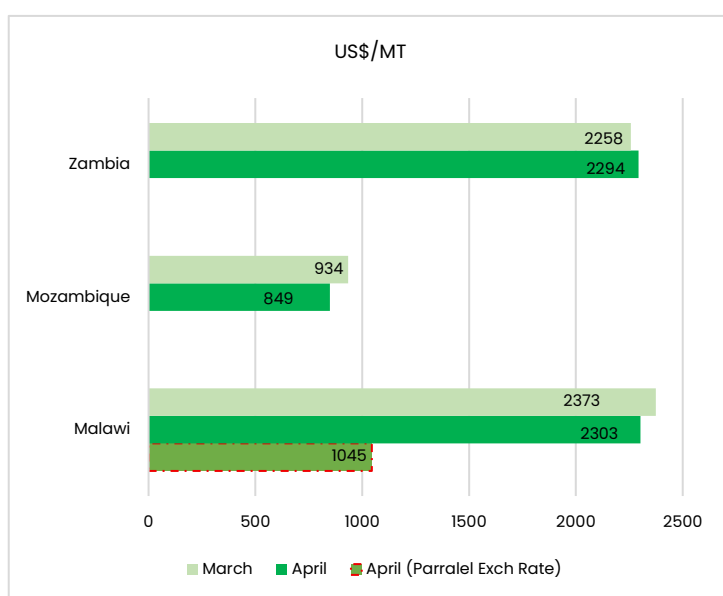


Figure 13 illustrates rice price movements (in USD per metric tonne) across Zambia, Mozambique, and Malawi, indicating mixed trends between March and April, driven by localized supply conditions. Overall, prices declined in Mozambique and Malawi, while Zambia recorded a modest increase.

Zambia's rice prices rose slightly from USD 2,258/MT to USD 2,294/MT (+2 percent), reflecting sustained import reliance and firm domestic demand amid limited local production. Conversely, **Mozambique** recorded a notable decline—from USD 934/MT to USD 849/MT (-9 percent)—suggesting improved market availability and easing import cost pressures following recent domestic supply inflows. Similarly, **Malawi** registered a moderate decrease, with prices falling from USD 2,373/MT to USD 2,303/MT (-3 percent) under the

official exchange rate, indicating some relief from earlier supply constraints. However, under the parallel exchange rate, prices drop sharply to USD 1,045/MT, positioning Malawi as relatively lower-priced market under real market valuation.

As illustrated in **Table 10**, rice prices in local currency terms across selected Southern African markets show mixed short-term movements alongside largely easing trends over the medium term, with notable country-specific differences. **Malawi** recorded short-term price easing (-3.2 percent month-on-month) following recent market inflows but remain moderately high over three (+1.8 percent) and six months (+5.2 percent) reflecting long-term constraints linked to seasonal supply shifts. **Mozambique** exhibited the most pronounced and sustained price decline across all timeframes (-9.1 percent month-on-month; -18.1 percent over three months; -21.4 percent year-on-year), driven by improved stock availability.

Zambia showed mild price increases in the short to medium term (+1.5 percent month-on-month; +4.7 percent over three months), reflecting localized tightening in domestic markets, though stable six-month and annual trends suggest balanced supply conditions and limited inflationary pressure. In contrast, **Zimbabwe** displayed mixed dynamics, with slight short-term increases but notable declines over six months (-12.9 percent) and year-on-year (-6.7 percent), indicating improved supply conditions, currency effects in USD terms, and continued market normalization following earlier price spikes.

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

Table 10: Percentage changes in rice prices in Southern Africa²³

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	3,971.85	-3.21 ▾	1.84 ▲	5.21 ▲	0.60 ▲
Mozambique	Rice (imported)	National Average, MZN/Kg	53.65	-9.06 ▾	-18.09 ▾	-9.12 ▾	-21.35 ▾
Zambia	Rice (Local)	National Average, Retail, Kwacha/KG	43.34	1.48 ▲	4.69 ▲	1.67 ▲	0.53 ▲
Zimbabwe	Rice	Epworth, Retail, USD/Kg	1.96	0.51 ▲	2.35 ▲	-12.89 ▾	-6.67 ▾

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

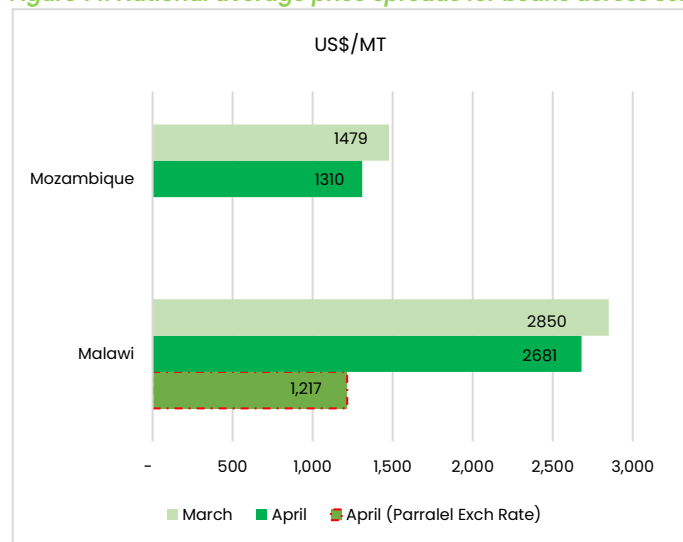


Figure 14 illustrates national average bean price trends for Mozambique and Malawi, underscoring the influence of harvest inflows on price movements. Overall, prices declined across all monitored markets, though the magnitude of adjustment varied significantly. **Malawi** recorded the highest bean prices in the region, despite a noticeable decline from USD 2,850/MT in March to USD 2,681/MT in April (–6%), reflecting easing supply pressures following harvest inflows; however, under the parallel exchange rate, prices drop to USD 1,217/MT, positioning Malawi among the lowest-priced markets. **Mozambique** also experienced price decline, with bean prices dropping from USD 1,479/MT to USD 1,310/MT (–11%), indicating improved market availability and easing supply constraints as seasonal production enters markets.

Table 11 summarises bean price movements across Malawi, Mozambique and Zimbabwe revealing contrasting dynamics driven by differences in harvest outcomes, market balance, and demand conditions. In **Malawi**, bean prices declined across all time horizons, driven by strong harvest inflows, improved availability, and sustained post-harvest supply surpluses, resulting in broadly softer market conditions. The sharp contraction over three months (–31.9 percent) and six months (–23.5 percent) underscores significant market adjustment following peak harvest periods. In contrast, soybean prices showed a divergent trend, with steep short-term declines reflecting recent supply easing but remaining substantially elevated year-on-year (+46.9 percent), indicating strong structural demand and constrained domestic production. In **Mozambique**, bean prices recorded broad easing in the short and medium term. Prices fell sharply month-on-month (–11.40%) and continued to decline over three months (–4.06%), indicating improved domestic availability. Over six months, prices edged slightly higher (+1.55%), suggesting stabilization following earlier declines. On a year-on-year basis, prices remained lower (–6.01%), pointing to softer conditions relative to last year. **Zimbabwe** displayed relatively stable but mildly inflationary dynamics. Bean prices increased modestly month-on-month (+0.64%) and continued to rise over the three-month (+2.61%) and six-month (+4.67%) periods, indicating gradual tightening within a relatively balanced market. On an annual basis, prices were also higher (+4.67%), underscoring overall stability with mild inflation in USD-denominated terms.

Table 11: Percentage changes in beans prices in Southern Africa²⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	4,624.11	-6.15 ▾	-31.89 ▾	-23.51 ▾	-4.06 ▾
Malawi	Soyabeans	National Average, MWK/Kg	2,533.10	-11.78 ▾	-31.58 ▾	-10.39 ▾	46.95 ✖
Mozambique	Beans	National Average, MZN/Kg	82.81	-11.40 ▾	-4.06 ▾	1.55 ▲	-6.01 ▾
Zimbabwe	Beans	Epworth, Retail, USD/Kg	3.14	0.64 ▲	2.61 ▲	4.67 ▲	4.67 ▲

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%)

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

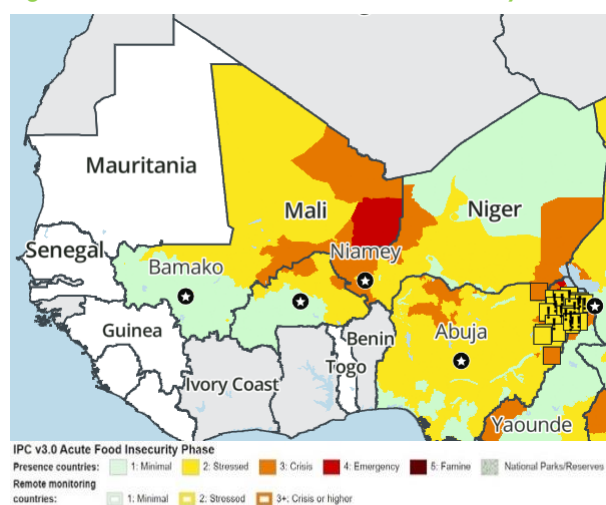
²⁴ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

Seasonal Monitor and Cropping Conditions

In **Southern Africa**, harvesting of main-season cereals is ongoing under mixed conditions, with continued concerns over the impacts of tropical cyclones and flooding, dry spells, and conflict in affected areas. In **Malawi**, recorded above-average rainfall with localized dry spells and flooding, but national harvests are expected to be average. In **Mozambique**, successive climatic shocks—including flooding, prolonged dry spells, and renewed heavy rainfall—have caused significant crop and livestock losses, affecting approximately 449,000 hectares (4.9 percent of planted area), particularly in the southern and central regions. Despite these disruptions, the 2025/26 harvest is projected to be near average overall, although outcomes are expected to vary across regions, with continued constraints from persistent dry conditions and ongoing conflict.

West Africa Food Security Update

Figure 15: West African Countries Food Security Outlook, April 2026



In April, **Burkina Faso** continued to face serious food security challenges, with Crisis (IPC Phase 3) conditions persisting in highly insecure areas such as Karo-Peli province, where poor households lack adequate income to meet basic food needs despite the availability of subsidized cereals and ongoing assistance. In Djelgodji and Yagha, Stressed (IPC Phase 2) outcomes prevailed, sustained largely by humanitarian support as household food stocks are depleted and purchasing power remains weak. High and rising food prices, well above five-year averages in key markets affected by insecurity, continue to constrain access to food, forcing households to reduce both meal size and frequency. While assistance has so far helped to prevent severe consumption gaps, household food consumption is expected to deteriorate rapidly in the coming months, with expanding Crisis and Emergency (IPC Phase 4) risks from June

onward amid persistent insecurity, low incomes, and emerging pressures from global supply disruptions linked to the Middle East conflict.

In **Mali**, food security conditions remain severe and are expected to deteriorate through September 2026, driven by conflict, displacement, market disruptions, and rising living costs.²⁵ Emergency (IPC Phase 4) food insecurity persists in Ménaka due to extreme livelihood erosion and high displacement, while Crisis (IPC Phase 3) conditions continue in Kidal and other insecure areas, where poor households face sharply reduced purchasing power. Renewed clashes between the army and armed groups, including coordinated attacks by JNIM and ALF and an announced blockade of Bamako, are disrupting trade flows and could worsen urban food insecurity if road blockades persist. At the same time, disrupted transhumance is degrading livestock conditions in northern areas, cutting pastoral incomes, while ongoing fuel supply constraints, linked to Middle East developments and insecurity along the Dakar and Abidjan corridors, are raising transport costs and food prices, forcing poor households to rely on coping strategies such as borrowing, assistance from relatives, and reducing both non-food and food consumption.

Niger continues to face significant food insecurity, with Crisis (IPC Phase 3) conditions persisting in conflict-affected regions of Tillabéry, Diffa, and northwestern Tahoua, driven by ongoing insecurity, population displacement, disrupted livelihoods, and very high food prices that limit market access for poor and displaced households.²⁶ Many affected households have exhausted food stocks and are reducing consumption to one or two meals per day, with the number of households in Crisis expected to increase from June and a small share projected to deteriorate to Emergency (IPC Phase 4) due to the combined effects of conflict and seasonal flooding. In relatively stable agricultural, agropastoral, and pastoral areas, Stressed (IPC Phase 2) outcomes prevail as households rely increasingly on expensive markets amid dwindling stocks and weak purchasing power. Although global disruptions linked to the Middle East conflict have not yet significantly affected domestic markets, the deteriorating security situation, particularly in Tillabéry, Diffa, Tahoua, and Dosso, continues to undermine food access and sustain high levels of vulnerability.

²⁵ <https://fews.net/west-africa/mali>

²⁶ <https://fews.net/west-africa/niger>

In **Nigeria** widespread acute food insecurity, with Crisis (IPC Phase 3) conditions persist across much of northern Nigeria and Emergency (IPC Phase 4) outcomes expected in inaccessible areas of the North East due to sustained conflict, displacement, and limited humanitarian access. Escalating insecurity, including attacks and abductions, has disrupted livelihoods, markets, and dry-season farming, resulting in below-average harvests and increased reliance on market purchases amid constrained incomes. As preparation for the main season begins, rising fuel and fertilizer costs, insecurity limiting access to farmland, and weak incentives from low staple prices are restricting farmers' capacity to expand production. Despite some macroeconomic stabilization, elevated inflation, surging energy and transport costs, and spillover effects from the Middle East conflict such as sharply higher fuel and fertilizer prices are eroding household purchasing power and sustaining high food prices, reinforcing severe food access constraints through at least September.

Commodity Prices

Key drivers of the price movements in West Africa include.

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

Maize

Figure 16: Price spreads for maize across select West African Countries²⁷

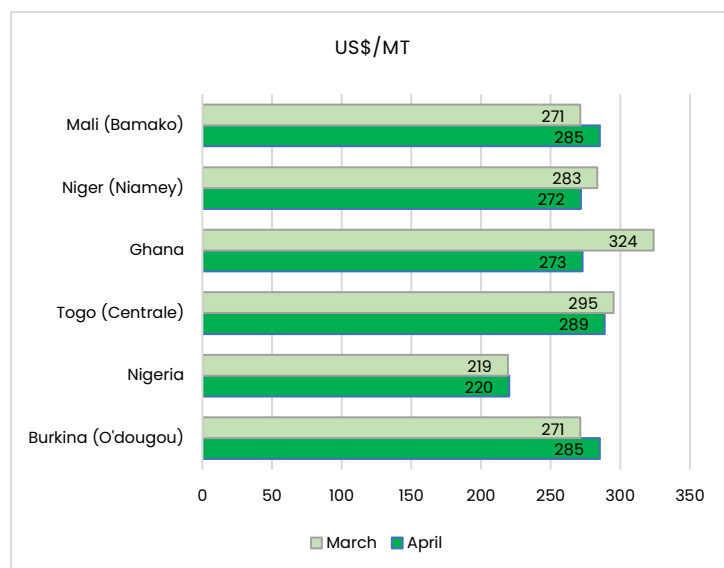


Figure 16 illustrates maize price movements (USD/metric tonne) across selected West African markets, showing mixed month-on-month trends between March and April driven by varying post-harvest supply conditions and localized market dynamics.

Mali (Bamako) and **Burkina Faso** (Ouagadougou) recorded similar increases, with prices rising from USD 271/MT to USD 285/MT (+5%), reflecting localized supply constraint and sustained demand. In contrast, **Ghana** registered the sharpest decline—from USD 324/MT to USD 273/MT (-16%) — attributed to amongst other reasons currency depreciation—while **Niger** also recorded a moderate decrease from USD 283/MT to USD 272/MT (-4%); both indicating improved availability following good harvest inflows.

Togo (Centrale) posted a marginal decrease from USD 295/MT to USD 289/MT (-2 percent), suggesting relatively stable conditions, while **Nigeria's** prices remained broadly unchanged, edging up slightly from USD 219/MT to USD 220/MT (+0.5 percent), indicating balanced short-term supply associated with the import waiver policy and macroeconomic stabilization.

Table 12 presents maize price trends in local currencies across select West African countries. Overall, maize prices across the region are largely stable or trending downward, with a few localized increases. Notable rises are observed in Mopti, Mali, where prices are 11–18% higher than their 1–6-month averages. Month-on-month comparisons from March to April show additional increases in Sikasso (7.7%) and Bamako (3.2%), as well as in Dédougou, Burkina Faso

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

(2.9%), and the Central (4.5%) and Savanes (2%) regions of Togo. Despite these upticks, maize prices are consistently lower than their levels from the same period last year across all monitored markets in the region.

Table 12: Percentage changes in maize prices in West Africa²⁸

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Maize	Bobo Dioulasso, Wholesale, XOF/100 kg	15,000.00	0.00	0.00	-16.67	-40.00
Burkina Faso	Maize	Dédougou, Wholesale, XOF/100 kg	17,500.00	2.94	2.94	-2.78	-30.00
Burkina Faso	Maize	Dori, Wholesale, XOF/100 kg	24,000.00	0.00	-4.00	-4.00	-23.81
Burkina Faso	Maize	Fada N'gourma, Wholesale, XOF/100 kg	18,500.00	0.00	0.00	-26.00	-28.85
Burkina Faso	Maize	Kongoussi, Wholesale, XOF/100 kg	20,000.00	0.00	0.00	-18.37	-27.27
Burkina Faso	Maize	Nouna, Wholesale, XOF/100 kg	17,500.00	0.00	-12.50	-10.26	-30.00
Burkina Faso	Maize	Ouagadougou, Wholesale, XOF/100 kg	16,000.00	3.23	0.00	-5.88	-34.69
Burkina Faso	Maize	Tenkodogo, Wholesale, XOF/100 kg	15,500.00	0.00	-3.13	-22.50	-44.64
Ghana	Maize (white)	National Average, (GHS/MT)	3,042.49	-0.53	-14.22	-31.16	-54.33
Mali	Maize	Bamako, Wholesale, XOF/100 kg	16,000.00	3.23	3.23	0.00	-30.43
Mali	Maize	Gao, Wholesale, XOF/100 kg	27,500.00	1.85	-8.33	-12.70	
Mali	Maize	Kayes, Wholesale, XOF/100 kg	18,000.00	0.00	0.00	-10.00	-21.74
Mali	Maize	Mopti, Wholesale, XOF/100 kg	20,000.00	11.11	17.65	17.65	-11.11
Mali	Maize	Ségou, Wholesale, XOF/100 kg	15,000.00	0.00	0.00	-11.76	-31.82
Mali	Maize	Sikasso, Wholesale, XOF/100 kg	14,000.00	7.69	3.70	-6.67	-37.78
Mali	Maize	Tombouctou, Wholesale, XOF/100 kg	27,000.00	0.00	12.50	-28.95	-22.86
Niger	Maize (imported)	Agadez, Wholesale, XOF/100 kg	28,000.00	0.00	-6.67	7.69	-30.00
Niger	Maize (imported)	Dosso, Wholesale, XOF/100 kg	13,500.00	-6.90	-27.03	-28.95	-50.91
Niger	Maize (imported)	Maradi, Wholesale, XOF/100 kg	13,000.00	-7.14	8.33	-27.78	-49.02
Niger	Maize (imported)	Niamey, Wholesale, XOF/100 kg	15,238.00	-5.88	-10.36	-7.65	-41.39
Niger	Maize (imported)	Tillabéri, Wholesale, XOF/100 kg	18,000.00	0.00	-5.26	-10.00	-37.93
Niger	Maize (imported)	Zinder, Wholesale, XOF/100 kg	15,000.00	0.00	7.14	-16.67	-41.18
Nigeria	Maize (white)	National Average, NGN/KG	302.75	-1.42	-8.06	-20.62	-40.75
Togo	Maize (white), XOF/Kg	Centrale,Retail, XOF/Kg*	162.00	4.52	-10.99	-15.18	-31.93
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	200.00	-13.42	-11.89	24.22	-23.08
Togo	Maize (white), XOF/Kg	Maritime,Retail, XOF/Kg*	165.00	-1.20	-2.94	-30.38	-29.79
Togo	Maize (white), XOF/Kg	Savanes,Retail, XOF/Kg*	150.00	2.04	-2.60	-5.66	-34.21

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 17: Price spreads for rice across select West African Countries²⁹

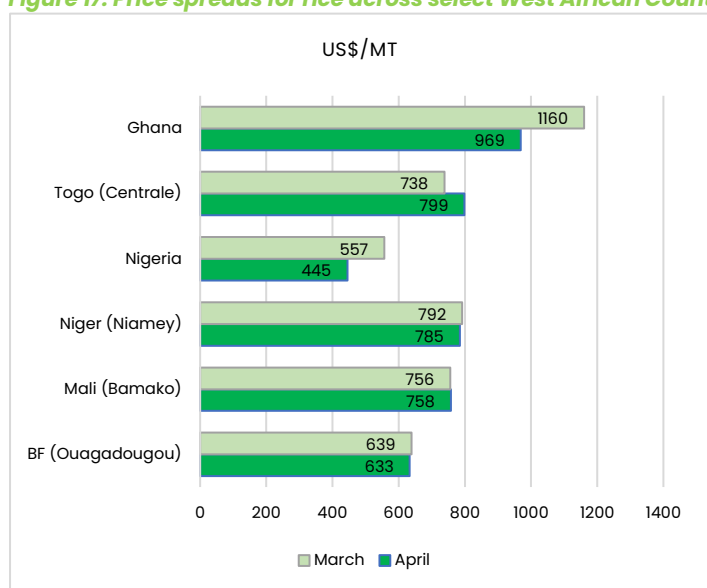


Figure 17 illustrates rice price movements (USD/metric tonne) across selected West African markets, showing mixed trends between March and April driven by varying supply conditions and import dynamics. **Nigeria** and **Ghana** recorded the sharpest declines to USD445/Mt (-20%) and USD969/Mt (-16%) respectively, reflecting improved domestic availability and easing import costs. In contrast, **Togo** posted a notable 8 percent increase to USD799/Mt month-on-month, indicating localized supply tightening. **Mali**, **Niger**, and **Burkina Faso** exhibited broadly stable prices, with only marginal movements, suggesting relatively balanced market conditions.

Similar to maize, rice prices across all monitored markets are generally lower than their levels over the past 1-12 months, with only a few localized increases (Table 13).

Compared with the same period last year, rice prices were higher only in Togo's Maritime region, recording a 14.2% increase. On a month-on-month basis, price increases were observed exclusively in Ghana (1.9%), Bamako (1.2%), Gao

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

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

(8.7–11.1%), Maradi (2.3%), and in Togo's Central (7.2%) and Maritime (19.3%) regions.

Table 13: Percentage changes in rice prices in West Africa³⁰

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	-23.53	-23.53	-23.53
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	40,000.00	-2.44	-5.88	-5.88	-20.00
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	40,000.00	0.00	-4.76	-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)	Ouagadougou, Wholesale, XOF/100 kg	35,500.00	0.00	0.00	-11.25	-22.83
Côte d'Ivoire	Rice	Abidjan, Retail, XOF/Kg*	695.00	0.00	0.72	1.46	-0.71
Ghana	Rice	National Average, (GHS/MT)	10,800.00	1.89	-14.29	-13.92	-26.26
Mali	Rice	Bamako, Wholesale, XOF/100 kg	42,500.00	1.19	-5.56	-5.56	-11.46
Mali	Rice	Gao, Wholesale, XOF/100 kg	50,000.00	11.11	11.11	-23.08	-23.08
Mali	Rice	Kayes, Wholesale, XOF/100 kg	52,000.00	0.00	0.00	0.00	-3.70
Mali	Rice	Ségou, Wholesale, XOF/100 kg	40,000.00	0.00	0.00	0.00	-13.04
Mali	Rice	Sikasso, Wholesale, XOF/100 kg	40,000.00	0.00	6.67	-5.88	-11.11
Mali	Rice	Tombouctou, Wholesale, XOF/100 kg	35,000.00	0.00	0.00	-22.22	-28.57
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 kg	37,000.00	-3.90	-5.13	-9.76	-22.92
Mali	Rice (imported)	Gao, Wholesale, XOF/100 kg	50,000.00	8.70	4.17	-10.71	-16.67
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 kg	30,000.00	0.00	-1.64	-7.69	-21.05
Mali	Rice (imported)	Ségou, Wholesale, XOF/100 kg	0.00	-100.00	-100.00	-100.00	-100.00
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 kg	39,000.00	0.00	-7.14	-13.33	-22.00
Niger	Rice (imported)	Agadez, Wholesale, XOF/100 kg	46,000.00	0.00	0.00	-4.17	-25.81
Niger	Rice (imported)	Dosso, Wholesale, XOF/100 kg	44,000.00	-4.35	0.00	-8.33	-21.43
Niger	Rice (imported)	Maradi, Wholesale, XOF/100 kg	44,000.00	2.33	4.76	4.76	-21.43
Niger	Rice (imported)	Niamey, Wholesale, XOF/100 kg	44,000.00	0.00	4.76	-4.35	-18.52
Niger	Rice (imported)	Zinder, Wholesale, XOF/100 kg	44,000.00	0.00	-4.35	-4.35	-21.43
Nigeria	Rice (milled)	National Average, NGN/KG	611.59	-21.59	-8.79	-27.96	-46.63
Togo	Rice (imported)	Centrale, Retail, XOF/Kg*	448.00	7.18	-0.88	-12.67	-9.68
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	619.00	-2.67	-5.35	36.34	-11.57
Togo	Rice (imported)	Maritime, Retail, XOF/Kg*	611.00	19.34	17.95	-2.24	14.21
Togo	Rice (imported)	Savanes, Retail, XOF/Kg*	440.00	-4.35	-3.72	-17.76	-17.91

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 18: Price spreads for millet across select West African Countries³¹

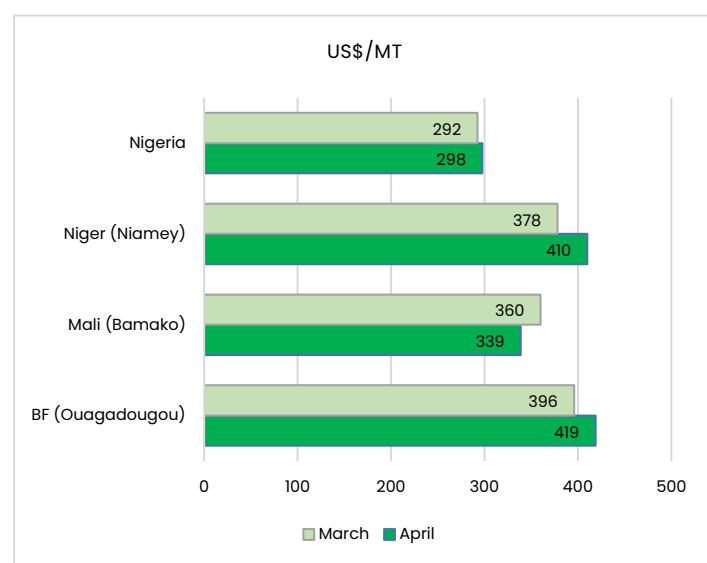


Figure 18 illustrates millet price movements (in USD per metric tonne) across selected West African markets, showing mixed trends between March and April driven by localized supply conditions and post-harvest dynamics. **Niger** and **Burkina Faso** recorded notable 8 percent and 6 percent increases, respectively, reflecting tightening supplies and increased domestic demand. Furthermore, **Nigeria** posted a modest increase of 2 percent, indicating relatively stable market conditions with slight upward pressure. In contrast, **Mali** recorded a decline of 6 percent, suggesting improved availability following harvest inflows.

Table 14 indicates that millet prices, denominated in local currencies, were lower than their levels a year ago in selected markets across West Africa. However, prices were notably higher in Maradi, Niger, compared with the

past 1–6 months, increasing by 15–36%. Millet prices also rose above recent averages in other markets, including Fada N'Gourma, Burkina Faso, where they were 8% higher than 1–3-month levels, and in Niger's Agadez (7.7%), Maradi

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

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

(15.2%), and Niamey (4.6%). Additionally, millet prices in Nigeria were approximately 20% higher than they were three months earlier.

Table 14: Percentage changes in millet prices in select West African Countries³²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	37,500.00	-1.32 ↘	-1.32 ↘	-1.32 ↘	-1.32 ↘
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	21,500.00	0.00 ●	2.38 ▲	-4.44 ↘	-33.85 ↓
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	29,000.00	0.00 ●	-3.33 ↘	-7.94 ↓	-27.50 ↓
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	27,000.00	8.00 ↑	8.00 ↑	-6.90 ↓	-18.18 ↓
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	23,500.00	0.00 ●	4.44 ▲	-4.08 ↘	-30.88 ↓
Mali	Millet	Bamako, Wholesale, XOF/100 kg	19,000.00	-5.00 ↓	-13.64 ↓	-13.64 ↓	-38.71 ↓
Mali	Millet	Gao, Wholesale, XOF/100 kg	27,500.00	0.00 ●	10.00 ↑	-15.38 ↓	-26.67 ↓
Mali	Millet	Kayes, Wholesale, XOF/100 kg	26,000.00	0.00 ●	-3.70 ↘	-7.14 ↓	-25.71 ↓
Mali	Millet	Ségou, Wholesale, XOF/100 kg	15,000.00	0.00 ●	-9.09 ↓	-14.29 ↓	-42.31 ↓
Mali	Millet	Sikasso, Wholesale, XOF/100 kg	23,000.00	-4.17 ↘	2.22 ▲	-16.36 ↓	-29.23 ↓
Mali	Millet	Tombouctou, Wholesale, XOF/100 kg	28,000.00	-12.50 ↓	0.00 ●	-30.00 ↓	-26.32 ↓
Niger	Millet	Agadez, Wholesale, XOF/100 kg	28,000.00	7.69 ↑	-9.09 ↓	-2.78 ↘	-30.00 ↓
Niger	Millet	Dosso, Wholesale, XOF/100 kg	20,500.00	0.00 ●	2.50 ▲	-10.87 ↓	-28.07 ↓
Niger	Millet	Maradi, Wholesale, XOF/100 kg	19,000.00	15.15 ×	31.03 ×	35.71 ×	-29.63 ↓
Niger	Millet	Niamey, Wholesale, XOF/100 kg	23,000.00	4.55 ▲	9.52 ↑	0.00 ●	-20.69 ↓
Niger	Millet	Zinder, Wholesale, XOF/100 kg	22,000.00	0.00 ●	10.00 ↑	-18.52 ↓	-35.29 ↓
Nigeria	Millet	National Average, NGN/KG	409.07	-9.28 ↓	19.79 ×	0.24 ▲	-23.25 ↓

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 19: Price spreads for sorghum across select West African Countries³³

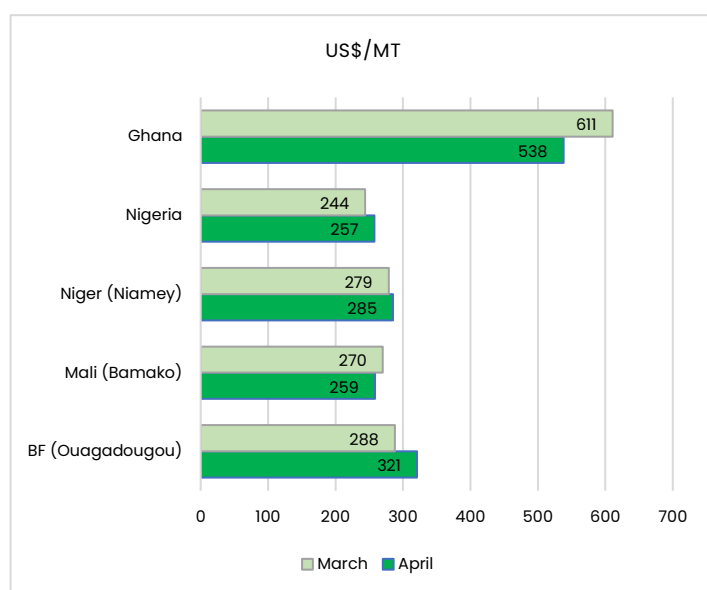


Figure 19 presents sorghum prices (in USD per metric tonne) across selected West African markets, reflecting a combination of localized supply dynamics, post-harvest market adjustments, and demand pressures. The sharp increase in **Burkina Faso** (Ouagadougou) recorded the sharpest increase, with prices rising by 11 percent to USD 321/MT, while **Nigeria** and **Niger** posted moderate gains of 5 percent and 2 percent to USD 257/MT and USD 285/MT, respectively—likely driven by localized supply constraints, strong domestic demand, and active cross-border trade within the Sahel. In contrast, **Ghana** registered a notable decline of 12 percent to USD 538/MT—despite remaining the highest-priced market—while **Mali** recorded a 4 percent decrease to USD 259/MT, both reflecting improved post-harvest availability and smoother market inflows following the main harvest period.

Overall, sorghum prices across selected West African markets are generally declining, with only a few localized increases (**Table 15**). Compared with the same period last year, all monitored markets recorded price decreases ranging from 8% to 42%. In contrast, Nigeria experienced higher prices relative to recent months, with increases of 9.5% and 34.6% compared to the past one and three months, respectively. On a month-on-month basis, sorghum prices rose modestly in Bobo-Dioulasso (2.4%) and Ouagadougou (5.9%) in Burkina Faso. Additional notable increases, relative to three months earlier, were observed in Dédougou (6%), Gao (10%), and Tombouctou (12.5%).

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

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

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

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	21,500.00	2.38 ▲	-4.44 ▾	-6.52 ↓	-8.51 ↓
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	17,500.00	0.00 ●	6.06 ↑	0.00 ●	-36.36 ↓
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	24,000.00	0.00 ●	-4.00 ▾	-7.69 ↓	-31.43 ↓
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	18,500.00	0.00 ●	0.00 ●	-26.00 ↓	-31.48 ↓
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	18,000.00	5.88 ↑	2.86 ▲	-5.26 ↓	-34.55 ↓
Ghana	Sorghum	National Average, (GHS/MT)	6,000.00	0.00 ●	-10.00 ↓	5.88 ↑	-13.25 ↓
Mali	Sorghum	Bamako, Wholesale, XOF/100 kg	14,500.00	-3.33 ▾	-6.45 ↓	-19.44 ↓	-34.09 ↓
Mali	Sorghum	Gao, Wholesale, XOF/100 kg	27,500.00	0.00 ●	10.00 ↑	-21.43 ↓	
Mali	Sorghum	Kayes, Wholesale, XOF/100 kg	18,000.00	-5.26 ↓	-5.26 ↓	-25.00 ↓	-28.00 ↓
Mali	Sorghum	Ségou, Wholesale, XOF/100 kg	14,000.00	0.00 ●	-6.67 ↓	-20.00 ↓	-36.36 ↓
Mali	Sorghum	Sikasso, Wholesale, XOF/100 kg	18,000.00	-5.26 ↓	-10.00 ↓	-10.00 ↓	-20.00 ↓
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 kg	27,000.00	0.00 ●	12.50 ↑	-32.50 ↓	-20.59 ↓
Niger	Sorghum	Agadez, Wholesale, XOF/100 kg	26,000.00	-7.14 ↓	-7.14 ↓	0.00 ●	-27.78 ↓
Niger	Sorghum	Dosso, Wholesale, XOF/100 kg	17,500.00	0.00 ●	-12.50 ↓	-25.53 ↓	-36.36 ↓
Niger	Sorghum	Maradi, Wholesale, XOF/100 kg	13,000.00	0.00 ●	0.00 ●	-7.14 ↓	-31.58 ↓
Niger	Sorghum	Niamey, Wholesale, XOF/100 kg	16,000.00	-5.88 ↓	-3.03 ▾	-20.00 ↓	-41.82 ↓
Niger	Sorghum	Zinder, Wholesale, XOF/100 kg	18,000.00	0.00 ●	0.00 ●	-10.00 ↓	-25.00 ↓
Nigeria	Sorghum (white)	National Average, NGN/KG	353.88	9.45 ↑	34.64 ☒	7.01 ↑	-26.88 ↓

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 Conditions³⁵

In **West Africa**, planting of main-season maize and rice is underway across the Gulf of Guinea under generally favorable agro-climatic conditions for the 2026/27 season, although conflict continues to pose risks to agricultural activities in affected areas. 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.

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

³⁵ Crop Monitor No. 115 – May 2026: [EarlyWarning_CropMonitor_202605.pdf](#)

Food Trade and Crisis Response Updates

Highlights of African Governments' Responses to the Crisis

- **Regional (ECOWAS) response:** ECOWAS Ministers agreed on immediate actions including mapping fertilizer stocks, suspending customs duties, regional procurement with subsidies, and mobilizing financing, alongside medium- and long-term strategies such as fertilizer reserves, emergency funds, farmer training, and development of a regional fertilizer industry using green ammonia and local phosphates.
- **West Africa country actions:** Burkina Faso is continuing large-scale fertilizer subsidies (60,000 MT for 2026–27) but faces a remaining supply gap of about 115,000 MT, prompting calls for urgent public–private coordination; Ghana plans limited free fertilizer distribution (20,000 MT), creating uncertainty for private suppliers; Mali has fixed subsidized prices for mineral and organic fertilizers to support ambitious 2026 production targets.
- **East Africa focus on alternatives:** Ethiopia, Kenya, and Malawi are emphasizing organic, organomineral, and regenerative approaches—such as compost, biochar blends, biological nitrogen fixation, and soil health trials—while also relying on existing inorganic fertilizer stocks and exploring local fertilizer production.
- **Large market stabilization efforts:** Nigeria is prioritizing market stabilization by boosting domestic production of fuel and fertilizers, while Kenya is scaling regenerative agriculture practices and supporting local production of organic and blended fertilizers through research institutions and private firms.
- **Southern Africa emergency and resilience measures:** Mozambique is implementing short-term emergency actions to address disaster impacts and rising energy costs (fuel subsidies and tax reductions), while investing in longer-term projects such as the AfDB-funded USD 22.8 million Rice Value Chain and Climate Resilience Project to reduce import dependence and strengthen food security.

East and Southern Africa Region Food Trade Updates

- Global shipping firm A.P. Moller–Maersk has temporarily suspended new cargo bookings to and from Somaliland's Port of Berbera due to scheduling changes, disrupting a rapidly expanding trade corridor that serves Ethiopia's import-dependent economy.³⁶ While existing shipments will continue, the halt is expected to raise freight costs, extend transit times, and divert cargo back to congested regional ports such as Djibouti and Mombasa, undermining Berbera's growing role as an alternative logistics hub for both Somaliland and Ethiopia.

Figure 20 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 20: East and Southern Africa cross-border trade updates, April 2026



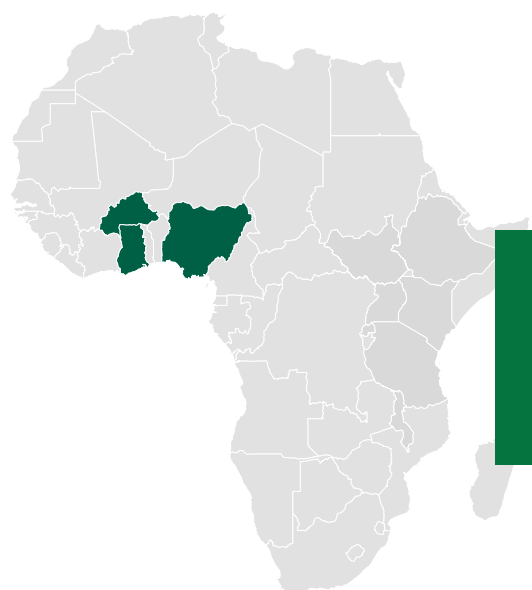
Tanzania

Tanzania has secured a \$2.33 billion syndicated loan arranged by Standard Chartered to advance its flagship Standard Gauge Railway, helping finance key sections of the planned 1,219-km line linking Dar es Salaam to Mwanza and strengthening trade corridors between the coast and inland regions. Once completed, the railway is expected to cut logistics costs, position Dar es Salaam as a regional trade gateway, and boost trade with landlocked neighbours including Rwanda, Uganda, Burundi and the DR Congo, reflecting Africa's broader push to modernise transport networks under AfCFTA.

³⁶ <https://africa.businessinsider.com/local/markets/global-container-shipping-giant-maersk-suspends-shipments-disrupting-key-horn-of-ptfzlpm>

West Africa Region Food Trade Updates

Figure 21: West Africa cross-border trade updates, April 2026



Burkina Faso

In a communiqué signed on Wednesday, April 29, 2026, the government of Burkina Faso has suspended the import of rice to support the sale of domestically produced rice. The measure takes effect immediately and will remain in force until further notice.

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Ghana-Mali

The Ghana Shippers' Authority and the Mali Shippers' Council have signed a new MoU to deepen long-standing cooperation by improving trade facilitation, logistics coordination, information sharing and harmonised transit procedures, with a Joint Technical Committee to oversee implementation. The agreement supports Ghana's ambition to become a preferred Sahelian transit corridor, backed by reforms such as the Ghana Shippers' Authority Act, 2024 and the Boankra Integrated Logistics Terminal, which is expected to cut transport costs by up to 14% via Tema Port and 48% via Takoradi Port.

Nigeria

- The Nigerian government has reduced rice import tariffs on bulk rice above 5 kg to 47.5% from 70% and reduced broken rice duty to 30% from 70%. This is a new measure under its 2026 fiscal policy document as trade routes face pressure in the midst of the US-Iran war.
- Nigeria has banned imports of 17 categories of goods from non-ECOWAS countries effective April 1, 2026, under revised fiscal and tariff measures that also introduce an Import Adjustment Tax on 192 tariff lines, a green tax on vehicles from July 1, 2026, and phased tariff reductions aligned with AfCFTA commitments through 2036. The policy also includes a 90-day grace period for existing contracts and reduced duties on 127 critical items.



Value	Unrealized P/L	%Unre
000.00		
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.

For more information,
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