

FOOD SECURITY MONITOR

AFRICA
FOOD TRADE
AND RESILIENCE
INITIATIVE



The monthly Food Security Monitor is a critical tool for stakeholders across the African agricultural landscape. This report equips policymakers, practitioners, and the wider community with vital insights to navigate challenges, prioritise interventions, and ultimately build a more food-secure future for all. This 70th 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 August 2026 Food Security Monitor edition:

Global Market Updates

- Global commodity market trends in August 2026 were characterized by rising food and agricultural commodity prices amid tightening global supply conditions, strong demand, weather-related production concerns, and trade disruptions. The FAO Food Price Index (FFPI) increased by 1.9% from July to 133.3 points, with gains across all major commodity groups, led by sugar (+11.9%), cereals (+2.2%), dairy (+2.3%), meat (+1.0%), and vegetable oils (+0.6%). Similarly, the IGC Grains and Oilseeds Index (GOI) rose sharply by 9.4% month-on-month and 21.7% year-on-year, driven primarily by strong increases in wheat (+9.6% m/m; +26.4% y/y) and soybeans (+11.0% m/m; +24.6% y/y), alongside gains in maize, barley, and rice. Global grain markets tightened further as forecasts for 2026/27 production were reduced due to adverse weather conditions, particularly in Europe, while disruptions to Black Sea exports added upward pressure on prices. In fertilizer markets, trends were mixed: phosphate fertilizers (DAP and MAP) remained firm and continued to rise modestly, potash prices were broadly stable, while urea prices declined for a third consecutive month as markets corrected after earlier record highs. Across Africa, fertilizer prices remained elevated in several countries, particularly in East and Southern Africa, although recent declines in countries such as Zambia, Ghana, and Nigeria suggest easing price pressures and improving market conditions in some markets amidst policy interventions.

Food Commodity Prices Updates

- Across **Eastern Africa**, staple food markets exhibited mixed trends in August 2026, reflecting improving supplies in some surplus-producing areas alongside localized market tightening elsewhere. **Maize** prices declined across most markets, particularly in Kenya (-10.1%), Ethiopia (-6.8%), Tanzania (-4.4%), and Rwanda (-4.3%), supported by harvest inflows and improved market availability, while Uganda (+2.7%) recorded an increase due to stronger regional demand and tightening domestic supplies. **Rice** prices remained largely stable across the region, although South Sudan (+5.2%) experienced a notable increase amid localized supply constraints. **Beans** prices were largely stable in Kenya, increased moderately in Rwanda and Tanzania, and surged in Uganda, although most markets remained below year-earlier levels except Rwanda, where prices were still higher than a year ago. **Wheat** prices softened in both Kenya (-3.6%) and Ethiopia (-1.1%). Overall, improved cereal availability helped moderate food price pressures across much of the region, although localized supply constraints and strong demand continued to support higher prices in selected markets.
- Southern Africa's** staple food markets exhibited mixed trends in August 2026, reflecting varying supply conditions, exchange-rate dynamics, and seasonal market adjustments. **Maize** prices declined in Zambia (-12.7%) and Mozambique (-2.0%) as harvest arrivals improved market availability, while Malawi (+3.5%) recorded an increase due to continued supply tightness despite favourable production prospects. **Rice** prices remained relatively stable, declining marginally in Zambia (-4.2%) and Malawi (-0.3%), while rising in Mozambique (+3.6%) due to localized supply pressures and import costs. **Bean** prices showed divergent trends, increasing in Malawi (+5.8%) amid tight supplies, but declining in Zambia (-5.9%) and Mozambique (-6.8%) as improved availability eased market pressures. **Fertilizer** markets remained broadly stable, with only modest month-on-month changes observed across major products.
- West Africa's** staple food markets exhibited mixed trends in August 2026, reflecting seasonal supply conditions, localized market pressures, and ongoing regional trade flows. **Maize** markets recorded the most notable movements, with prices increasing sharply in Togo (+8.7%) and Niger (+8.2%), while Mali (-5.4%) registered the largest decline; maize prices in Ghana and Nigeria changed only modestly, and Burkina Faso remained broadly stable. **Rice** markets were generally stable across the region, with only minor price fluctuations, although Ghana (-2.8%) recorded a moderate decline. Coarse grain markets strengthened in several countries, led by significant increases in Niger's millet (+22.5%) and sorghum (+12.5%) prices, reflecting tightening supplies and seasonal stock drawdowns. In contrast, Ghana's sorghum market (-4.2%) was the only one to record a decline, while most other markets experienced either modest gains or relative stability.

Food Security Updates

- Across **East Africa** food security continued to deteriorate driven by the combined impacts of climate shocks, conflict, displacement, high food prices, and weak household purchasing power. In **Ethiopia**, widespread Crisis (IPC Phase 3) outcomes persist, particularly among pastoralists, displaced populations, and conflict-affected communities, as poor rainfall performance, below-average harvest prospects, inflation, and limited humanitarian assistance constrain food access. In **Kenya**, food insecurity remains elevated in refugee settlements and pastoral counties, with Emergency (IPC Phase 4) conditions expected in Dadaab and Crisis (IPC Phase 3) outcomes persisting in several arid and semi-arid areas due to flooding risks, poor livestock production, reduced maize harvests, and constrained livelihood opportunities. **South Sudan continues to face one of the world's most severe food security crises, with widespread Emergency (IPC Phase 4) outcomes, localized risks of Catastrophe/Famine (IPC Phase 5), severe acute malnutrition**, and worsening conditions driven by conflict, economic decline, flooding, drought, and restricted humanitarian access. Meanwhile, **Uganda** faces persistent Crisis (IPC Phase 3) conditions in Karamoja and among refugee populations due to poor harvests, high food and fuel prices, limited income opportunities, and growing humanitarian needs. Across the region, anticipated El Niño-related weather extremes, including droughts and flooding, are expected to further undermine agricultural production, livelihoods, and market access, leaving millions vulnerable to acute food insecurity through early 2027.
- Key food security trends in **Southern Africa** point to a **generally deteriorating outlook in several countries despite relatively favourable harvest outcomes in some areas**. Malawi, Mozambique, and Zimbabwe are expected to experience increasing food insecurity during the October 2026 to January 2027 lean season, with Crisis (IPC Phase 3) outcomes emerging or expanding due to high food prices, weakened purchasing power, declining agricultural labour opportunities, and depleted household food stocks. In Mozambique, conflict continues to drive acute food insecurity in Cabo Delgado and northern Nampula, while Zimbabwe faces worsening conditions in deficit-producing areas despite an above-average national maize harvest, owing to limited market access and persistently high staple food prices. **In contrast, Zambia remains relatively food secure, with Minimal (IPC Phase 1) outcomes prevailing across most of the country** due to strong harvests and adequate food supplies, although vulnerable households in some western, southern, and eastern areas are expected to remain Stressed (IPC Phase 2). Across the region, the anticipated persistence of a strong El Niño poses a major threat, with forecasts of below-average rainfall, higher temperatures, reduced crop and livestock production, lower agricultural labour demand, and declining household incomes likely to increase food insecurity and place additional pressure on food markets during the 2026/27 agricultural season.
- In **West Africa**, conflict, insecurity, displacement, high food prices, and weather-related production challenges continue to drive acute food insecurity across the region, particularly in the Sahel and Lake Chad Basin. **Emergency (IPC Phase 4) outcomes persist in parts of Mali, Niger, and Nigeria, while Crisis (IPC Phase 3) conditions remain widespread in conflict-affected areas of Burkina Faso, northern Nigeria, Niger, and parts of Mali**, where insecurity continues to disrupt agricultural production, livelihoods, market access, and humanitarian assistance. Although the arrival of seasonal harvests and generally improved rainfall conditions are expected to enhance food availability and support some recovery in countries such as Mali, Togo, and Côte d'Ivoire, gains are being constrained by population displacement, trade disruptions, weakened purchasing power, and persistently high food and transport costs. In relatively more stable areas, including much of Côte d'Ivoire and Togo, Stressed (IPC Phase 2) outcomes are expected to persist as poor households struggle to meet essential non-food needs despite improved food access. Across the region, conflict remains the dominant driver of food insecurity, while erratic rainfall, localized flooding, reduced crop production prospects, disease outbreaks, and economic pressures continue to compound vulnerabilities and hinder household recovery through early 2027.

Update on El Niño conditions

A powerful El Niño event is developing in the Pacific Ocean and is projected to become one of the strongest on record during the 2026/27 season, with NOAA estimating a greater than 90% probability of its continuation and a 69% chance of surpassing all El Niño events recorded since 1950. This is significantly increasing climate-related risks across Africa. In Southern Africa, despite an above-average 2026 cereal harvest driven by strong maize production, forecasts indicate below-normal rainfall and above-average temperatures during the upcoming cropping season, threatening crop establishment, yields, food availability, and farmer incomes in 2027. **In East Africa, recurrent droughts, heatwaves, and erratic weather continue to undermine crop and livestock production**, while anticipated wetter conditions may increase flood risks and infrastructure damage rather than support recovery. Food security conditions remain particularly severe in conflict-affected countries such as Sudan, where millions face acute

food insecurity and heightened famine risk. In West and Central Africa, agricultural production has generally remained near average, but variable rainfall, localized moisture deficits, conflict, displacement, and market disruptions continue to threaten livelihoods and food access. Overall, the combination of El Niño-driven climate shocks, conflict, economic pressures, and displacement is expected to exacerbate food insecurity across the continent, underscoring the need for early preparedness, climate adaptation, and resilience-building measures.

Food Trade Updates

- On 6 August 2026, the African Development Bank Group approved a \$255 million loan and a \$10 million grant to support Zambia's participation in the Lobito Economic Corridor, a regional initiative linking Zambia, Angola, and the Democratic Republic of the Congo to boost trade, industrialisation, and economic growth. The project will fund the construction of 550 km of railway infrastructure, upgrade key roads, improve trade facilitation and institutional capacity, reduce logistics costs, attract investment, and create thousands of jobs while promoting skills development, youth employment, and climate-resilient infrastructure.
- Kenya and DRC are deepening regional digital integration through the launch of the 2,000 km Goma-to-Mombasa (G2M) fibre corridor and the integration of Kenya's Pesalink instant-payment platform with the Pan-African Payment and Settlement System (PAPSS), enabling faster connectivity and near real-time cross-border payments in local currencies. Together, these initiatives aim to boost trade, reduce transaction and connectivity costs, strengthen financial and digital inclusion, and support broader economic integration across East and Central Africa.
- The African Organization for Standardisation (ARSO) has launched the Africa Quality Mark in Mombasa, a continent-wide certification framework designed to support the African Continental Free Trade Area (AfCFTA) by eliminating duplicate product testing and quality inspections across borders. The initiative will allow goods certified in one African country to be accepted across participating markets, reducing trade costs, accelerating border clearance, improving market access and competitiveness, and helping address longstanding non-tariff barriers that have constrained intra-African trade, while also requiring investments in standard harmonisation, laboratory accreditation, enforcement capacity, and digital systems to ensure credibility and adoption across the continent.

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 AGRA: 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 (**Table 1**) and tracks average changes in food prices over the past year (**Table 2**) across 17 countries in Eastern, Southern, and Western Africa.

Based on the August 2026 IPC/CH Phase 3+ estimates (**Table 1**), the overall pattern of severe food insecurity remains broadly stable across the countries assessed, with most countries recording no change compared to July 2026. Nigeria continues to have by far the largest number of people facing Crisis or worse food insecurity, with 36.3 million people, significantly exceeding all other countries. South Sudan follows with 7.8 million people, while Kenya (4.1 million), Mozambique (3.5 million), Zimbabwe (2.5 million), and Niger (2.4 million) also report substantial numbers of food-insecure populations. At the lower end of the scale, the smallest numbers are recorded in Togo (0.33 million), Uganda (0.35 million), Tanzania (0.51 million), and Zambia (0.70 million).

In proportional terms, South Sudan remains the most severely affected country, with 55% of the population experiencing IPC/CH Phase 3+ food insecurity. This level remains considerably higher than that of all other countries in the analysis. Uganda (24%) records the second-highest share despite having a relatively small number of affected people. Kenya and Malawi (22% each) follow, highlighting significant population-level vulnerability. High proportions are also observed in Mozambique (18%), Zambia (17%), Nigeria (16.7%), and Zimbabwe (16%). At the opposite end of the spectrum, Ghana records the lowest proportional burden at 4%, while Côte d'Ivoire, Tanzania, and Togo (5% each) also maintain relatively low shares of their populations in Crisis or worse food insecurity.

Compared with July 2026, the August data indicate limited overall movement in food insecurity conditions, with most countries showing no change. However, a few notable improvements are evident. Malawi records the largest proportional decline, with a 52% reduction, while Zambia records a 59% reduction, suggesting significant improvements in food security outcomes in both countries. Despite these improvements, Malawi continues to have a relatively high proportion of its population in IPC/CH Phase 3+ (22%), indicating that food insecurity remains a major concern.

Table 2 presents maize price changes across selected African countries over the last six months and the last year, highlighting divergent market trends across the continent. Overall, maize prices have generally declined in much of West Africa and Southern Africa, reflecting improved market supplies and easing inflationary pressures. In contrast, several East African countries continue to experience strong price increases, indicating persistent supply constraints, market disruptions, and inflationary pressures.

In West Africa, maize prices mostly trended downward on both a six-month and annual basis. Togo recorded one of the largest declines, with prices falling by 16.8% over the last six months and 29.9% year-on-year. Burkina Faso also experienced substantial reductions of 4.2% and 31.8%, respectively, while Ghana registered declines of 8.9% over six months and 36.3% over the past year, the sharpest annual reduction among the countries reviewed. Despite the generally downward trend, some countries showed recent signs of tightening market conditions. Nigeria (+19.3%), Niger (+12.4%), and Mali (+6.1%) all recorded price increases over the last six months. However, maize prices in these countries remained below year-earlier levels, declining by 10.9%, 26.9%, and 18.0%, respectively, suggesting that recent increases have not fully reversed the longer-term downward trend.

In East Africa, maize market conditions were mixed, with several countries continuing to face upward price pressures. South Sudan recorded the most pronounced increases in the sample, with maize prices rising by 99.1% over the last six months and 48.7% year-on-year, highlighting severe supply challenges and continuing market disruptions. Ethiopia also experienced strong price growth, with maize prices increasing by 49.4% over six months and 59.8% over the last year, indicating persistent inflationary pressures in domestic grain markets. By contrast, Kenya (-6.8%) and Rwanda (-4.2%) recorded modest declines over the last six months. While Kenya's prices remained slightly below year-earlier levels (-2.8%), Rwanda's prices were 2.7% higher than a year ago, suggesting that recent supply

improvements have not fully offset earlier price increases. Uganda registered a 10.5% increase over six months, although prices remained 19.5% lower than a year earlier, pointing to a recent market recovery following earlier declines. Tanzania showed significant easing, with maize prices declining by 36.1% over six months and 20.7% year-on-year, reflecting improved production and market availability.

In Southern Africa, maize prices generally showed signs of stabilization and decline. Zambia recorded the largest reduction in the region, with prices falling by 38.5% over the last six months and 12.7% year-on-year. Malawi also experienced decreases of 7.3% over six months and 29.0% over the past year, indicating a substantial easing of prices compared with previous levels. Mozambique presents a contrasting pattern: although maize prices declined by 3.9% over the last six months, they remained 10.7% higher than a year ago. This suggests that while market conditions may have improved recently, prices continue to remain above historical levels.

Table 1: People in IPC/CH Phase 3+ or Equivalent

Country	IPC/CH Phase 3+ (Number) - August	IPC/CH Phase 3+ (%) - August	Change from July 2026
South Sudan	7,834,758	55	0
Uganda	352,285	24	0
Kenya	4,118,270	22	0
Malawi	1,935,075	22	-52
Mozambique	3,517,915	18	0
Zambia	697,809	17	-59
Nigeria	36,289,939	16.65	0
Zimbabwe	2,499,000	16	0
Niger	2,420,879	9	0
Mali	1,560,189	6	0
Cote d'Ivoire	1,326,912	5	0
Tanzania	507,498	5	0
Togo	332,147	5	0
Ghana	1,502,143	4	0

Source: Author's construction based on WFP data

Table 2: Changes in Average Maize Prices (Local Currency)

Country	Commodity Price Changes (%) in the last 6 months	Commodity Price Changes (%) in the last 1 year
Burkina Faso	-4.19 ↓	-31.83 ↓
Ethiopia	49.40 ↑	59.78 ↑
Ghana	-8.87 ↓	-36.32 ↓
Kenya	-6.82 ↓	-2.82 ↓
Malawi	-7.32 ↓	-28.99 ↓
Mali	6.14 ↑	-18.02 ↓
Mozambique	-3.90 ↓	10.72 ↑
Niger	12.35 ↑	-26.88 ↓
Nigeria	19.33 ↑	-10.85 ↓
Rwanda	-4.15 ↓	2.72 ↑
South Sudan	99.14 ↑	48.71 ↑
Tanzania	-36.11 ↓	-20.69 ↓
Togo	-16.78 ↓	-29.92 ↓
Uganda	10.53 ↑	-19.48 ↓
Zambia	-38.53 ↓	-12.72 ↓

Key: ● No Change ↑ Increase ↓ Decrease

Table 3 shows mixed cereal price (in USD) trends across monitored African markets between July and August 2026, with maize prices recording notable increases in several countries, while rice prices generally remained stable with moderate movements across most markets.

For maize, South Sudan remained by far the most expensive market at USD 1,469/MT, unchanged from July, followed by Zimbabwe at USD 819/MT, where prices also remained stable. Other relatively high-priced maize markets included Malawi (USD 518/MT) and Ethiopia (USD 442/MT). The lowest maize prices were recorded in Tanzania (USD 217/MT), Togo (USD 245/MT), Nigeria (USD 265/MT), and Mali (USD 265/MT). The largest month-on-month increase in maize prices was observed in Malawi (+16%), followed by Niger (+14%), Ghana (+13%), Ethiopia (+7%), and Nigeria (+7%). Moderate increases were also recorded in Burkina Faso (+4%), Uganda (+3%), and Mali (+1%). In contrast, maize prices declined most sharply in Zambia (-30%), followed by Kenya (-10%), Togo (-7%), Tanzania (-4%), Rwanda (-4%), and Mozambique (-4%). Prices remained unchanged in South Sudan and Zimbabwe.

For rice, Zambia continued to record the highest price at USD 2,065/MT, despite a 6% decline from July, followed closely by Zimbabwe (USD 2,060/MT), where prices remained unchanged, and Malawi (USD 1,984/MT), which registered a modest 2% increase. Other relatively high-priced rice markets included Kenya (USD 1,395/MT) and Rwanda (USD 1,324/MT). Nigeria remained the lowest-priced rice market at USD 460/MT, followed by Mozambique (USD 694/MT), South Sudan (USD 744/MT), and Togo (USD 772/MT). The largest increase in rice prices was recorded in Burkina Faso (+25%), followed by South Sudan (+5%), Ghana (+4%), Niger (+3%), and Togo (+3%). More modest increases were observed in Malawi (+2%), Mali (+1%), and Côte d'Ivoire (+1%). On the other hand, rice prices fell most sharply in Mozambique (-11%), followed by Zambia (-6%), Nigeria (-5%), Rwanda (-2%), Kenya (-1%), and Uganda (-1%), while prices remained unchanged in Tanzania and Zimbabwe.

Table 3: The Prices of Maize and Rice Across All Monitored Countries (USD/MT)

Maize	August	July	% Increase/ decrease
Ethiopia	442	414	7%
Kenya	402	447	-10%
Rwanda	398	416	-4%
Tanzania	217	227	-4%
Uganda	417	406	3%
South Sudan	1469	1473	0%
Malawi	518	448	16%
Zambia	313	447	-30%
Mozambique	258	268	-4%
Zimbabwe	819	819	0%
Burkina (O'dougou)	283	271	4%
Nigeria	265	248	7%
Togo (Centrale)	245	263	-7%
Ghana	281	247	13%
Niger (Niamey)	300	263	14%
Mali (Bamako)	265	263	1%

Rice	August	July	% Increase/ decrease
Kenya	1395	1403	-1%
Rwanda	1324	1348	-2%
Tanzania	794	795	0%
South Sudan	744	707	5%
Uganda	955	964	-1%
Malawi	1984	1946	2%
Mozambique	694	779	-11%
Zimbabwe (Epsworth)	2060	2060	0%
Zambia	2065	2198	-6%
BF (Ouagadougou)	812	648	25%
Mali (Bamako)	795	788	1%
Niger (Niamey)	795	771	3%
Nigeria	460	487	-5%
Togo (Centrale)	772	748	3%
Ghana	992	953	4%
Cote d'Ivoire (Abidjan)	1218	1208	1%

Global Food Commodity Price Trends

The FAO Food Price Index (FFPI) (**Figure 2**) averaged 133.3 points in August 2026, up 1.9% from July.¹ The FFPI increased across all major commodity groups, rising above July levels and standing 2.5% higher than a year earlier, although still well below its March 2022 peak. The strongest increase was recorded in the Sugar Price Index, which surged by 11.9% month-on-month due to concerns over tightening global supplies linked to adverse weather conditions in major producing regions and stronger import demand, particularly from India. The Cereal Price Index rose by 2.2%, supported by higher prices for wheat, maize, sorghum, barley, and rice amid strong demand, weather-related production concerns, and disruptions to Black Sea exports. The Dairy Price Index increased by 2.3%, driven by higher milk powder and cheese prices due to tightening milk supplies in the European Union, while the Meat Price Index rose by 1.0% as higher poultry, pig, and ovine meat prices offset weaker bovine meat prices. The Vegetable Oil Price Index posted a more modest increase of 0.6%, marking its third consecutive monthly increase, with stronger palm and soy oil prices outweighing declines in sunflower and rapeseed oil quotations.

Overall, the International Grains Council (IGC) Grains and Oilseeds Index (GOI) estimates point to a widespread surge in global grain and oilseed prices, as of 2nd September, with all major commodities recording positive monthly and annual growth (**Table 4**). While wheat and soybeans remain the primary drivers of the increase due to their particularly strong gains, maize, barley, and rice have also contributed to the upward movement in the overall index. The global grain and oilseed markets strengthened considerably, with the overall GOI rising to 260.09, reflecting a 9.4% month-on-month increase and a substantial 21.7% increase compared with the same period last year.

According to the IGC Global Market Report², global grain markets tightened further in August 2026 as the forecast for 2026/27 total grains production was cut by 5 million tonnes to 2.416 billion tonnes due to deteriorating wheat, maize and sorghum prospects, particularly in Europe following sustained heat stress. Although global grain consumption was also revised down, world stocks are expected to fall to 606 million tonnes, reflecting a tightening supply outlook. Grain trade was raised slightly on stronger EU maize import demand, despite significant disruptions to Black Sea exports from Russia and Ukraine. By contrast, soyabean production and trade remain on track to reach record highs, supported by strong demand from feed, food and biofuel sectors, while rice markets remain broadly stable, with record trade expected on robust African and Asian demand despite a slightly lower production outlook.

Among the commodities tracked, soybeans recorded the strongest monthly increase, rising by 11.0% compared with the previous month. Soybeans also posted a significant 24.6% year-on-year increase, highlighting continued strength in global oilseed markets and ranking among the largest annual gains observed across the commodities. This performance underscores sustained demand and firm market fundamentals in the soybean sector. Wheat prices also increased sharply, rising by 9.6% month-on-month, while recording the largest annual increase of all commodities at 26.4% year-on-year. The strong gains suggest significant tightening in global wheat markets relative to both the previous month and the same period last year.

Maize prices rose by 8.3% over the month and 14.2% year-on-year, indicating a robust upward trend, although less pronounced than the increases recorded for wheat and soybeans. The continued rise points to strengthening market conditions and sustained demand support. Barley prices also increased by 6.9% month-on-month and 12.4% year-on-year, reflecting steady gains in both the short and longer term. The increases suggest continued market support and broadly favourable price dynamics within the barley sector. Meanwhile, rice recorded the smallest monthly increase among the commodities tracked, rising by 3.8% compared with the previous month. Despite the relatively moderate month-on-month movement, rice prices remained significantly above year-earlier levels, increasing by 13.8% year-on-year, indicating that longer-term price strength persists.

¹ <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

² https://www.igc.int/en/gmr_summary.aspx

Figure 2: FAO Food Price Index (FFPI)³

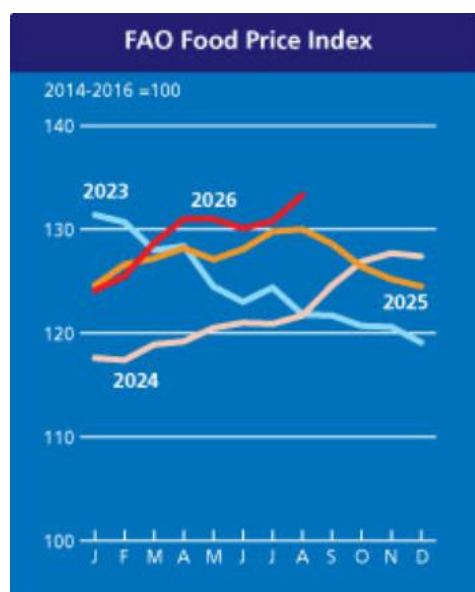


Table 4: IGC GOI Commodity Price Indices⁴

Jan 2000 = 100	02-Sep	% Change 1M	% Change 1Y
GOI	260.09	9.42	21.66
Wheat	241.47	9.57	26.42
Maize	248.72	8.30	14.20
Rice	181.99	3.75	13.79
Soyabeans	264.87	10.99	24.60
Barley	255.24	6.92	12.38

Fertiliser Prices Outlook

Global fertilizer markets continued to display mixed trends, with phosphate fertilizers remaining relatively firm, potash prices largely stable, and urea prices extending their recent decline (**Figure 3**)⁵. DAP prices increased to US\$918/MT, representing a 0.4% month-on-month increase and a 7.6% increase compared to August 2025, reflecting sustained strength in phosphate fertilizer markets despite slower price growth in recent months. Similarly, MAP prices rose marginally to US\$959/MT, posting a 0.1% monthly increase and a 5.4% annual increase, indicating continued market support and relatively stable demand conditions.

In contrast, potash prices edged down slightly to US\$493/MT, declining by 0.2% from the previous month. Despite this marginal decrease, potash prices remained 1.6% higher than a year earlier, suggesting generally balanced market conditions with limited supply or demand pressures. The stability observed in potash prices throughout the review period points to a relatively well-supplied market compared with other fertilizer categories.

Urea recorded the largest monthly decline among the fertilizers tracked, falling to US\$655/MT, a 4.5% decrease from July 2026. Nevertheless, urea prices remained 3.6% higher than a year earlier, indicating that current prices continue to be supported by gains accumulated earlier in the marketing year. The August decline extends the downward trend that began after prices peaked at US\$865/MT in May 2026, suggesting that global urea markets are continuing to correct following a period of exceptionally strong price growth.

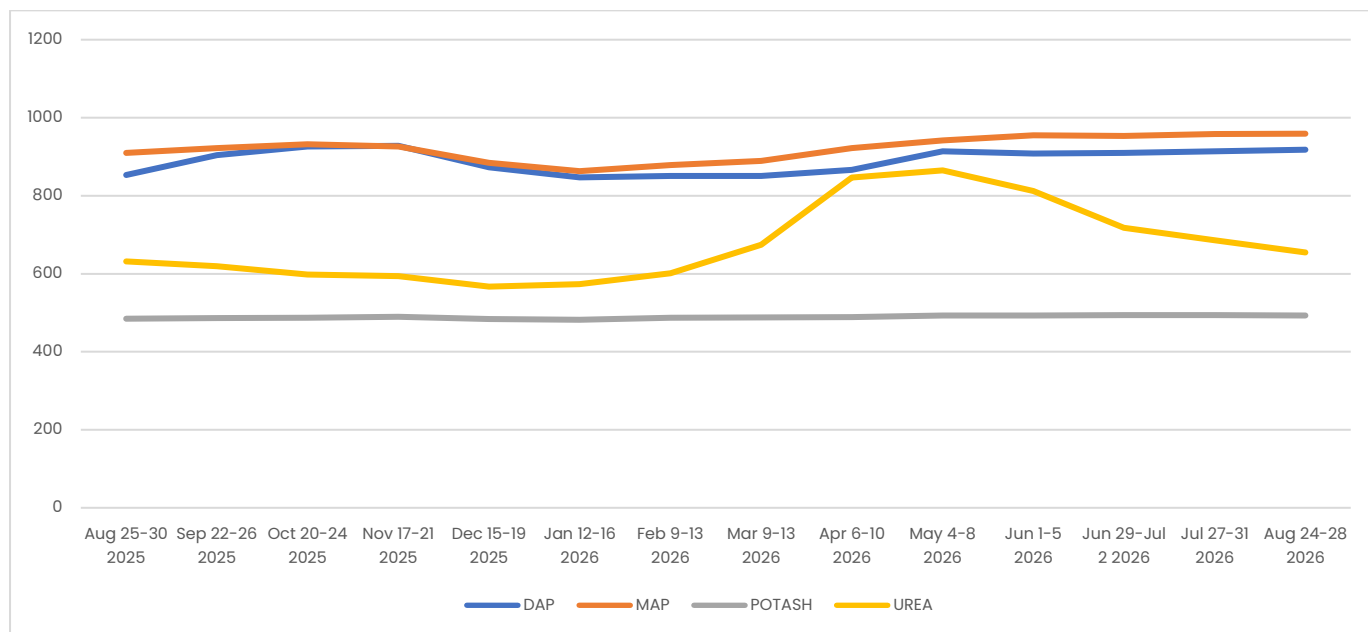
Overall, the August 2026 data indicate that phosphate fertilizer markets remain comparatively strong, as reflected in continued increases in DAP and MAP prices, while potash markets remain broadly stable. Meanwhile, urea prices continue to moderate after reaching record highs earlier in 2026, although they remain above year-earlier levels. The overall trend suggests improving market balance in nitrogen fertilizers alongside persistent firmness in phosphate fertilizer markets.

³ Ibid

⁴ <https://igc.int/en/public-site/markets/marketinfo-goi.aspx>

⁵ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2026/09/02/fertilizer-prices-fall-uan28-urea>

Figure 3: Dry Fertiliser Prices (\$/MT)



Source: Author's construction based on DTN ⁶

Table 5 presents fertilizer price changes across selected African countries over the last month, three months, six months, and one year, revealing considerable variation in fertilizer market dynamics across the region. Overall, fertilizer prices remain elevated in several East and Southern African countries despite some recent short-term declines, while countries such as Zambia and Nigeria show signs of market stabilization and easing price pressures.

In East Africa, fertilizer markets continue to experience some of the strongest annual price increases. Rwanda recorded substantial increases across both NPK and urea fertilizers. NPK prices rose by 7.1% over the last month, 26.1% over three months, 32.5% over six months, and 55.2% year-on-year. Similarly, urea prices increased by 6.6% over the past month, 29.0% over three months, 36.6% over six months, and 65.7% over the last year, indicating persistent upward pressure and sustained market tightness. The Government of Rwanda increased fertilizer prices for Season 2027A in response to higher global fertilizer costs, supply chain disruptions, rising energy prices, and geopolitical tensions, with Urea rising from RWF 1,190/kg to RWF 1,980/kg and NPK from RWF 1,369/kg to RWF 1,861/kg. Despite corresponding increases in subsidized farmer prices, government support continues to absorb a significant share of the cost burden.

In Uganda, fertilizer price trends were more mixed. DAP prices declined by 13.9% over the last month but remained 81.5% higher than six months ago and 6.0% above year-earlier levels, reflecting the legacy of earlier sharp price increases. Uganda's NPK prices declined by 18.4% month-on-month and 15.4% over three months, although they remained 7.9% higher than six months ago and 17.1% above last year's levels, suggesting recent market corrections following previous supply constraints.

In Southern Africa, fertilizer prices generally remained above year-earlier levels, although recent movements varied across countries. Malawi continued to experience moderate price growth. NPK prices increased by 2.0% over the last month, 13.1% over three months, and 11.4% over six months, while remaining 29.4% higher than a year ago. Urea prices rose by 2.6% month-on-month, 13.5% over three months, and 18.2% over six months, with annual growth reaching 29.4%, indicating sustained inflationary pressures in fertilizer markets. Mozambique showed a contrasting pattern, with fertilizer prices declining recently but remaining substantially above year-earlier levels. NPK prices fell by 10.6% over the last month but were still 26.3% higher than six months ago and 27.3% above year-earlier levels. Likewise, urea prices declined by 10.7% month-on-month but remained 21.2% higher over six months and 37.4% above levels recorded a year earlier, suggesting that recent easing has not fully reversed earlier increases. By contrast, Zambia experienced significant and broad-based declines in fertilizer prices. NPK prices fell by 17.3% over the last month, 23.7% over three months, and 30.3% over six months, while urea prices declined by 3.1%, 12.1%, and 29.2%, respectively, over the same periods. These trends point to a marked easing of fertilizer costs, likely reflecting improved supply availability and the effects of policy interventions, including fertilizer support programmes.

In West Africa, fertilizer price movements were generally more stable. In Ghana, DAP prices remained unchanged across all reported periods, indicating a highly stable market. NPK prices were also stable during the past month but

⁶ <https://www.dtnpf.com/agriculture/web/ag/crops/article/2026/05/27/fertilizer-prices-fall-first-time-14>

increased by 8.4% over three months, suggesting some recent upward pressure. By contrast, urea prices fell sharply by 28.6% over the last month and 44.4% over three months, pointing to a significant easing in market prices. In Nigeria, fertilizer prices showed only modest changes. NPK prices declined marginally by 0.8% over the last month and 3.4% over three months, while remaining 0.9% higher over six months and 2.9% lower than a year earlier. Urea prices decreased by 2.2% month-on-month and 9.2% over three months but were still 11.0% higher than six months ago and 2.7% above year-earlier levels, indicating a relatively stable fertilizer market compared with other countries in the sample.

Table 5: National Average Fertilizer Prices

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Rwanda	NPK	National Average USD/50kg	1,239.29	7.11 ↑	26.14 ☒	32.46 ☒	55.22 ☒
Rwanda	Urea	National Average USD/50kg	1,270.49	6.60 ↑	29.02 ☒	36.62 ☒	65.69 ☒
Uganda	DAP	National Average, Retail, UGX/Kg	6,727.27	-13.92 ↓	59.97 ☒	81.48 ☒	6.00 ↑
Uganda	NPK	National Average, Retail, UGX/Kg	3,837.16	-18.40 ↓	-15.37 ↓	7.90 ↑	17.13 ☒
Malawi	NPK	National Average, MWK/Kg	4,177.94	2.00 ▲	13.09 ↑	11.44 ↑	29.44 ☒
Malawi	Urea	National Average, MWK/Kg	4,055.52	2.64 ▲	13.48 ↑	18.16 ☒	29.43 ☒
Mozambique	NPK	National Average, MZN/Kg	88.33	-10.62 ↓	17.55 ☒	26.32 ☒	27.33 ☒
Mozambique	Urea	National Average, MZN/Kg	86.58	-10.67 ↓	16.22 ☒	21.17 ☒	37.35 ☒
Zambia	NPK	National Average, Retail, ZMW/KG	18.80	-17.30 ↓	-23.72 ↓	-30.28 ↓	
Zambia	Urea	National Average, Retail, ZMW/KG	18.76	-3.06 ▢	-12.11 ↓	-29.23 ↓	
Ghana	DAP	National Average, (GHS/50KG)	850.00	0.00 ●	0.00 ●		
Ghana	NPK 25-10-10	National Average, (GHS/50KG)	450.00	0.00 ●	8.43 ↑		
Ghana	Urea	National Average, (GHS/50KG)	400.00	-28.57 ↓	-44.44 ↓		
Nigeria	Fertiliser_NPK	National Average, NGN/50KG	969.93	-0.76 ▢	-3.40 ▢	0.89 ▲	-2.87 ▢
Nigeria	Fertiliser_Urea	National Average, NGN/50KG	886.93	-2.17 ▢	-9.19 ↓	11.01 ↑	2.66 ▲

Source: AGRA MIS data

Update on the Impacts of the US–Iran Crisis

Over the past month, the U.S.–Iran crisis has entered a renewed phase of escalation despite intermittent diplomatic engagement. Following a relative lull after the July confrontations, tensions reignited at the end of August when attacks on commercial shipping in and around the Strait of Hormuz prompted renewed U.S. military operations against Iranian targets. On 1 September 2026, the United States conducted air strikes against Islamic Revolutionary Guard Corps (IRGC) facilities after alleged Iranian attacks on commercial vessels and U.S. personnel in the region. Iran responded with strikes against U.S. military assets and regional partners, while both sides exchanged threats of further retaliation.⁷ The conflict subsequently expanded into a broader cycle of military exchanges involving Gulf shipping lanes, military bases, and energy infrastructure, underscoring the continued fragility of regional security arrangement.

The Strait of Hormuz remains the central flashpoint. Although diplomatic efforts involving Oman have continued, no comprehensive agreement has yet been reached on restoring normal maritime traffic. Iran has maintained restrictions on vessel movements and continued to blacklist vessels perceived as violating its navigation directives, while simultaneously linking any reopening of unrestricted shipping to broader demands such as sanctions relief, compensation, and reductions in the U.S. military presence in the Gulf.⁸ As a result, shipping disruptions have persisted, contributing to elevated operational and security risks for commercial operators.

The economic impact continues to be substantial. The Strait of Hormuz remains one of the world's most important energy corridors, accounting for approximately 25% of global seaborne crude oil and petroleum trade and around 19% of global liquefied natural gas (LNG) flows. Continued attacks on vessels and restrictions on navigation have increased war-risk premiums, insurance costs, and freight rates across the Gulf. Industry reports indicate that the cost of transiting the Strait under current security conditions has risen dramatically, with some very large crude carrier (VLCC) voyages reportedly costing up to US\$20 million when insurance and security surcharges are included.⁹

The conflict has also intensified economic pressure on the world. Global trade continues to face indirect impacts through higher energy, transportation, and insurance costs. Gulf states have accelerated efforts to diversify export

⁷ <https://virginiabusiness.com/us-launches-air-strikes-iran-strait-of-hormuz/>; West Asia conflict updates: Iran blacklists more ships trying to sail through Hormuz, govt. website shows – The Hindu

<https://www.cnn.com/2026/08/08/uae-ship-targeted-missile-us-iran-tensions-stay-high.html>; US Sanctions Intensify Pressure on Iran as Strait of Hormuz Tensions Persist

https://www.everycrsreport.com/files/2026-08-07_R45281_f0a6d43cfd16b2461049a1c77774974a288dadbdf.html;

<https://www.mightyshipping.com/en/blog/2026-07-01-hormuz-reopening-july-freight-outlook>

routes and reduce dependence on the Strait of Hormuz. Countries such as the United Arab Emirates, Saudi Arabia, Kuwait, and Qatar have expanded contingency measures, including strategic storage facilities, alternative pipeline routes, and export terminals outside the Gulf.¹⁰ These measures reflect growing concerns about the long-term reliability of the Strait as a global trade artery.

Agricultural commodity markets also remain sensitive to developments in the conflict. Higher energy prices continue to influence fertilizer production costs, transportation expenses, and biofuel demand, thereby affecting grain markets. Although weather conditions and crop prospects remain the primary drivers of agricultural prices, geopolitical uncertainty in the Gulf has contributed to increased volatility in wheat, corn, and soybean markets. Market analysts note that sustained energy price increases would likely support grain prices by raising production and logistics costs globally while also strengthening demand for biofuel feedstocks.¹¹

Energy markets remain highly sensitive to developments in the conflict. Following renewed hostilities in late August and early September, Brent crude prices rose sharply as traders priced in the risk of prolonged supply disruptions. Although prices remained below the July peak, the market experienced significant volatility, with Brent crude registering gains of approximately 4% during the initial September escalation.¹² Analysts continue to warn that any prolonged disruption of Gulf exports could trigger further price spikes and tighten global energy supplies, particularly for Asian and European importers that rely heavily on Gulf crude and LNG exports.¹³

Across Africa, fuel price trends between July and August showed a mix of stability and renewed increases, while prices remained above March levels in most countries (**Table 6**). Rwanda continued to record some of the largest cumulative increases, with petrol and diesel prices remaining 48% and 50% above March levels respectively in August. Prices were unchanged from July, indicating that elevated fuel costs have become entrenched despite the absence of further monthly increases. Tanzania also maintained significant fuel price inflation. Petrol and diesel prices remained broadly stable between July and August but were still 36% and 40% higher than March levels respectively. Similarly, Kenya's fuel prices showed little movement over the month. Petrol prices remained unchanged, while diesel prices declined slightly by 2%. Nevertheless, compared to March, petrol and diesel prices were still 21% and 32% higher, suggesting continued pressure on transport and production costs. Uganda recorded mixed movements in August. Petrol prices declined marginally by 1% compared to July, while diesel prices increased by 1%. Despite these relatively small monthly adjustments, fuel prices remained substantially above March levels, with petrol 27% higher and diesel 37% higher. This indicates that fuel-related cost pressures remain elevated across East Africa.

In Southern Africa, Mozambique continued to record the highest diesel inflation among the countries reviewed. Diesel prices remained 85% above March levels, while petrol prices were 14% higher. Both fuels were unchanged between July and August, suggesting that high prices have persisted rather than eased. Zambia also recorded no further monthly changes in August, with petrol prices remaining 5% below March levels while diesel prices were still 16% higher than in March, reflecting a relatively more moderate fuel inflation environment compared with neighbouring countries. Malawi registered the most notable monthly increase in diesel prices. While petrol prices remained unchanged, diesel prices rose sharply by 44% between July and August, leaving diesel prices 28% above March levels. Petrol prices remained 13% above March levels. This marks a significant reversal from the July decline and points to renewed fuel cost pressures in the country.

In West Africa, Ghana experienced further increases in fuel prices during August. Petrol prices rose by 3% and diesel prices by 1% compared with July. As a result, petrol and diesel prices stood 29% and 19% above March levels respectively, indicating sustained upward pressure in domestic fuel markets. Nigeria also recorded a modest increase in diesel prices of 2%, while petrol prices remained unchanged. Compared to March, petrol prices were 3% higher, whereas diesel prices remained 10% below March levels, making Nigeria one of the few countries where diesel costs remained below their March benchmark.

¹⁰ <https://www.tacticalreport.com/topics/strait-of-hormuz-crisis-2026>

¹¹ https://www.everycrsreport.com/files/2026-08-07_R45281_f0a6d43cfd16b2461049a1c77774974a288dadbf.html

¹² https://www.everycrsreport.com/files/2026-08-07_R45281_f0a6d43cfd16b2461049a1c77774974a288dadbf.html

¹³ <https://virginiabusiness.com/us-launches-air-strikes-iran-strait-of-hormuz/>

Table 6: Fuel Prices (in local currencies)

Country	March		July		August		Changes (%) July/August		Changes (%) March/August	
	Petrol	Diesel	Petrol	Diesel	Petrol	Diesel	Petrol	Diesel	Petrol	Diesel
Kenya	178.28	166.54	214	222.86	214.9	219.3	0%	-2%	21%	32%
Rwanda	1989	1948	2938	2927	2938	2927	0%	0%	48%	50%
Tanzania	2864	2858	3898	3978	3909	3990	0%	0%	36%	40%
Uganda	5158	4831	6600	6560	6550	6595	-1%	1%	27%	37%
Malawi	4965	4945	5619	4389	5619	6306	0%	44%	13%	28%
Mozambique	82.5	62.8	93.69	116.25	93.69	116.3	0%	0%	14%	85%
Zambia	26.61	23.25	25.29	26.89	25.29	26.89	0%	0%	-5%	16%
Ghana	11.57	14.35	14.45	16.94	14.94	17.11	3%	1%	29%	19%
Nigeria	1290	2010	1330	1770	1330	1800	0%	2%	3%	-10%

Update on El Niño conditions

A powerful El Niño event is developing in the Pacific Ocean and is projected to become one of the strongest on record during the 2026/27 season, with NOAA estimating a greater than 90% probability of its continuation and a 69% chance of surpassing all El Niño events recorded since 1950.¹⁴ For Africa, this raises significant concerns as the phenomenon is expected to intensify climate extremes across the continent, increasing the likelihood of severe droughts and heatwaves in Southern Africa while bringing excessive rainfall and flooding to parts of East Africa. These conditions threaten agricultural production, water security, livelihoods, public health, energy generation, and ecosystems. Smallholder farmers are particularly vulnerable, as drought-related crop failures can result in both food and income losses, while floods can damage infrastructure and increase disease outbreaks. Reduced rainfall may also constrain hydropower generation and water supplies, while prolonged droughts can degrade ecosystems, heighten wildfire risks, and weaken biodiversity. Although El Niño does not determine exact weather outcomes, it significantly raises the probability and severity of these climate-related impacts, underscoring the need for early preparedness, climate adaptation measures, and strengthened resilience across affected regions.

In **Southern Africa**, strong 2026 Harvests Mask Growing Risks for the 2026/27 Production Season. Southern Africa recorded an estimated 43.4 million tonnes of cereal production in 2026, representing approximately 10% above the five-year average, largely driven by favorable rainfall conditions and strong maize harvests in South Africa and Zambia.¹⁵ However, this positive production outcome is unlikely to guarantee food security in the coming season. Emerging climate forecasts indicate a high probability of a strengthening El Niño event, which is expected to bring below-average rainfall and above-average temperatures across much of the Southern African Development Community (SADC) region during the October 2026 to March 2027 cropping season. Countries most at risk include South Africa, Namibia, Botswana, Zimbabwe, Mozambique, Lesotho, Eswatini, and parts of Angola and Zambia.

The SADC Climate Services Centre and SARCOF-33 forecast indicate that large portions of Southern Africa are likely to experience below-normal rainfall during the critical planting window, increasing the risk of reduced crop establishment, moisture stress, and lower yields for staple crops such as maize. At the same time, above-normal temperatures are expected across most of the region, intensifying evapotranspiration and further reducing soil moisture availability.¹⁶ These conditions threaten to reverse the gains achieved during the 2026 harvest season and could significantly weaken regional food availability and farmer incomes during 2027.

Across **East Africa**, recurrent droughts, prolonged heatwaves, and increasingly erratic weather patterns continue to undermine agricultural production and pastoral livelihoods. Large areas of Sudan, South Sudan, Somalia, Ethiopia, and Eritrea have experienced severe rangeland degradation, crop losses, and declining livestock productivity. While forecasts suggest wetter-than-normal conditions in parts of the Greater Horn of Africa during the upcoming October

¹⁴ <https://www.sadc.int/latest-news/sadc-outlook-favours-drier-conditions-across-much-southern-africa-during-202627-rainy>

¹⁵ https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/el-nino-drives-crop-failure-central-america-and-east-africa-and-threatens-next-season-southern-2026-09-03_en?prefLang=it

¹⁶ <https://www.sadc.int/latest-news/sadc-outlook-favours-drier-conditions-across-much-southern-africa-during-202627-rainy>; [EN_FINAL SARCOF-33 STATEMENT-final-26Aug2100hrs.pdf](#)

to December rainy season, these rains are expected to increase the likelihood of flash floods and infrastructure damage rather than provide immediate recovery for drought-affected communities.¹⁷

The food security situation is particularly alarming in conflict-affected countries. In Sudan, nearly 19.5 million people, equivalent to 41% of the population, are experiencing acute food insecurity (IPC Phase 3 or above), while 14 areas across Darfur and South Kordofan are currently assessed as being at risk of famine if conflict intensifies and humanitarian access remains constrained. Additionally, approximately 825,000 children under five are projected to suffer severe acute malnutrition in 2026.¹⁸

Regionally, humanitarian agencies estimate that 39 million people across Eastern Africa are facing crisis-level food insecurity or worse, while more than 53 million people require humanitarian assistance due to the combined effects of conflict, climate shocks, displacement, disease outbreaks, and economic instability.¹⁹ The convergence of these challenges is pushing millions of households toward livelihood collapse and increasing the risk of acute hunger across several hotspots in the region.

In **West and Central Africa**, first-season maize production has generally remained near average, but agricultural conditions remain fragile across Nigeria's Middle Belt, Mali, Burkina Faso, Benin, Chad, and parts of the Sahel due to highly variable rainfall distribution and localized moisture deficits. Although seasonal forecasts suggest generally average rainfall conditions for much of the region, drier-than-normal conditions are anticipated in some coastal zones and central Nigeria, potentially affecting crop performance later in the season.²⁰

Nevertheless, conflict and insecurity continue to be the primary drivers of food insecurity. Armed violence across the Sahel, the Lake Chad Basin, and northern coastal states is disrupting agricultural activities, restricting market access, displacing populations, and limiting humanitarian assistance. According to regional food security assessments, an estimated 52.8 to 55 million people across West and Central Africa are expected to face acute food insecurity during the 2026 lean season, including more than 3 million people in Emergency (IPC Phase 4) conditions. The crisis is particularly severe in Nigeria, Chad, Niger, Cameroon, Mali, and Burkina Faso, where conflict, economic pressures, and climate shocks continue to reinforce one another.²¹

¹⁷https://hiiraan.com/op4/2026/Aug/206135/before_the_floodwaters_rise_turning_the_octoberdecember_2026_rainfall_forecast_into_early_action_across_the_horn_of_africa.aspx

¹⁸ <https://thesudantimes.com/sudan/un-14-sudanese-areas-in-darfur-south-kordofan-at-famine-risk/>; <https://www.ipcinfo.org/ipc-country-analysis/details-map/en/c/1163315/?iso3=SDN>

¹⁹ <https://reliefweb.int/report/south-sudan/south-sudan-food-security-outlook-update-conflict-and-poor-rains-sustain-emergency-and-risk-famine-through-harvest-june-2026-january-2027>

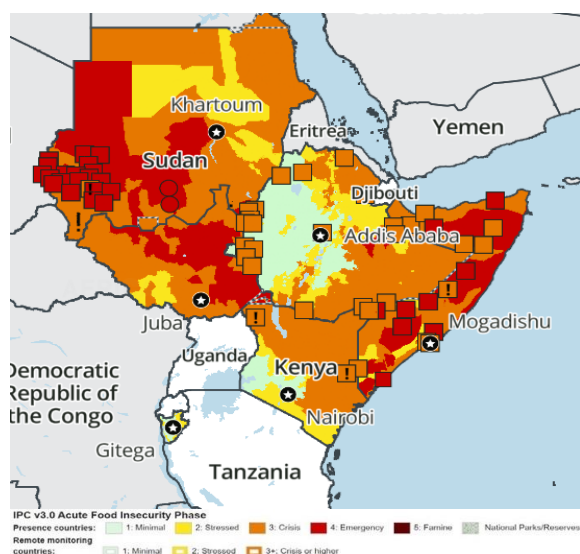
²⁰ https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/el-nino-drives-crop-failure-central-america-and-east-africa-and-threatens-next-season-southern-2026-09-03_en?prefLang=it

²¹ <https://www.reliefcenter.com/blog/latest-news-14/west-and-central-africa-on-the-brink-of-a-deepening-food-crisis-55-million-people-face-acute-food-insecurity-amid-converging-crises-and-a-narrowing-window-for-action-200>; <https://news.un.org/en/story/2026/01/1166776>

East Africa Food Insecurity Updates

Food Security Outlook

Figure 4: East African Countries Food Security Outlook, August 2026



Ethiopia's food security situation remains highly fragile, with millions of households facing difficulty meeting basic food needs during the peak June to August lean season due to high food prices, limited income opportunities, and heavy market dependence.²² Crisis (IPC Phase 3) outcomes are widespread, particularly among internally displaced persons, refugees, and pastoral communities in southern, southeastern, and northern areas, where poor livestock productivity, reduced herd sizes, and elevated food prices continue to constrain access to food. Although improved rainfall in late July supported planting and reduced the risk of widespread crop failure, El Niño-induced rainfall deficits, delayed seasonal onset, and poor rainfall distribution have significantly undermined agricultural production, especially in eastern Amhara, Tigray, Afar, and parts of Oromia. As a result, a below-average meher harvest is expected, following similarly poor belg harvests that reduced household food stocks and income. While the upcoming meher harvest may

improve outcomes to Stressed (IPC Phase 2) in some cropping areas from October, the recovery is expected to be limited by below-average production. At the same time, persistently high food prices, inflation, and inconsistent humanitarian assistance continue to weaken household purchasing power and exacerbate food insecurity, with pastoral areas expected to remain in Crisis through at least January 2027.

Food insecurity in **Kenya** is expected to remain elevated in several vulnerable areas through January. Crisis! (IPC Phase 3!) outcomes are projected to persist in Kakuma and Kalobeyi refugee settlements, while Emergency (IPC Phase 4) conditions are expected to emerge in Dadaab between October and January due to flooding, disease outbreaks, limited livelihood opportunities, and disruptions to humanitarian access. Crisis (IPC Phase 3) outcomes are also expected to continue across pastoral counties including Garissa, Mandera, Tana River, Wajir, and Turkana, where flooding, poor rainfall performance in some areas, livestock and crop production challenges, and constrained market activities are likely to undermine household recovery. In the marginal agricultural areas, Stressed (IPC Phase 2) outcomes are expected to persist, although above-average short rains are anticipated to improve agricultural labour opportunities and support green harvests from December; however, many households will continue relying on coping strategies to meet non-food needs. At the national level, food security concerns are compounded by an estimated 22–28% below-average long rains maize harvest, driven by prolonged dry spells and rainfall deficits in key production areas, which could reduce domestic food availability and exert upward pressure on food prices in the coming months. Anticipating the looming risk, the Kenya government plans to purchase 10.8 million bags of maize from Zambia to address a domestic grain shortage caused by poor harvests, while Zambia says it has sufficient maize stocks and is ready to support exports once trade terms are agreed.²³

South Sudan is expected to remain one of the world's most food-insecure countries through January 2027, driven by the combined impacts of conflict, El Niño-induced drought, seasonal flooding, economic deterioration, and declining household purchasing power. Emergency (IPC Phase 4) food insecurity remains widespread, with some populations in conflict-affected and hard-to-reach areas facing Catastrophe (IPC Phase 5) and a persistent risk of Famine (IPC Phase 5), particularly in Akobo, Nyirol, Nasir, and Ulang if conflict intensifies and restricts access to food and humanitarian assistance.²⁴ Although humanitarian aid is helping to reduce the severity of food insecurity in some areas, coverage remains fragile, and conditions are expected to worsen after assistance declines and despite the arrival of the main harvest, as drought and conflict have limited agricultural production in several regions. At the same time, South Sudan continues to face a severe nutrition crisis, with critical to extremely critical levels of acute malnutrition driven by displacement, poor water and sanitation conditions, limited health and nutrition services, disease outbreaks, and ongoing insecurity.

Uganda's food security outlook remains concerning, particularly in Karamoja and among refugee populations, where

²² <https://fews.net/east-africa/ethiopia>

²³ <https://www.openzambia.com/economics/2026/8/29/kenya-ready-to-buy-108-million-bags-of-maize-from-zambia>

²⁴ <https://fews.net/east-africa/south-sudan>

Crisis (IPC Phase 3) outcomes are expected to persist through January 2027 due to poor harvests, high food and fuel prices, limited incomes, and growing humanitarian needs. In Karamoja, below-average and poorly distributed rainfall has caused substantial crop losses estimated at 50–70%, weakened pasture conditions, reduced livestock productivity, and diminished household incomes, while ongoing El Niño conditions are likely to further constrain agricultural production.²⁵ Although the government has launched an emergency food assistance program that is expected to temporarily alleviate consumption gaps, food insecurity is projected to remain severe without sustained support. Meanwhile, refugee households are increasingly vulnerable as food stocks decline and assistance levels become insufficient, with needs expected to peak between October and November. Rising fuel costs and associated increases in living expenses, together with income losses linked to Ebola-related market and movement restrictions, continue to erode purchasing power and limit access to food for vulnerable households.

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 in 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 5: National average price spreads for maize across select East African Countries²⁶

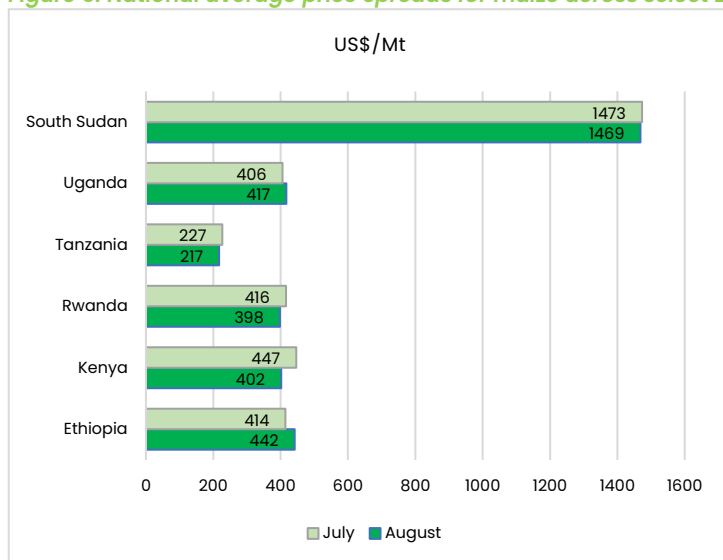


Figure 5 presents maize prices (USD/metric tonne) across selected East African countries, showing mixed movements between July and August. Kenya registered the most significant decline, with prices falling by 10.1% from USD 447/MT to USD 402/MT, likely reflecting improved cross-border inflows and increased market availability. Prices also declined in Rwanda by 4.3%, from USD 416/MT to USD 398/MT, while Tanzania recorded a 4.4% decrease from USD 227/MT to USD 217/MT, supported by favourable harvests and improved supplies. These conditions reinforced Tanzania's position as the region's most competitively priced maize market. South Sudan also recorded a marginal decline of 0.3%, with prices easing from USD 1,473/MT to USD 1,469/MT, although it remained by far the highest-priced maize market in the region,

reflecting persistent supply constraints, high transaction costs, and market inefficiencies underpinned by conflicts, weather related shocks, and macroeconomic difficulties.

In contrast, Ethiopia and Uganda were the only markets to record price increases. In Ethiopia, maize prices rose by 6.8%, increasing from USD 414/MT in July to USD 442/MT in August, suggesting tightening domestic supplies and continued inflationary pressures. Uganda recorded a more moderate increase of 2.7%, with prices rising from USD 406/MT to USD 417/MT, likely supported by stronger regional demand and trade flows. Despite the increase, Uganda's maize prices remained below those of Ethiopia and Kenya. Overall, the data indicate a generally stable to declining maize market across much of East Africa, with notable upward pressure evident only in Ethiopia and Uganda.

Table 7 summarises maize price trends across selected East African countries, revealing a mixed market situation characterized by substantial price increases in Ethiopia and South Sudan, while prices declined in Kenya, Rwanda, Tanzania, and Uganda. South Sudan recorded the strongest month-on-month increase, with white maize prices rising

²⁵ <https://fews.net/east-africa/uganda>

²⁶ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

by 10.8% to SSP 8,155.33/kg, while also posting the largest increases over the medium term, with prices up 57.1% over three months, 99.1% over six months, and 48.7% higher than a year earlier. These increases reflect severe market pressures linked to conflict, supply constraints, inflation, and high transport costs. In Ethiopia, maize prices also increased significantly, rising by 14.6% in Bahir Dar and 6.8% at the national level. Compared to six months ago, prices were 59.9% higher in Bahir Dar and 49.4% higher nationally, while annual increases exceeded 50% in both markets, indicating persistent inflationary pressures and tightening cereal supplies.

In contrast, maize prices declined across several regional markets. Kenya recorded the sharpest monthly decline among these countries, with prices falling by 10.0% to KES 51.61/kg, reflecting improved market availability and seasonal supply gains. Prices were also lower than three months ago (-8.1%), six months ago (-6.8%), and one year earlier (-2.8%). Similarly, Tanzania registered a 4.2% monthly decline, with maize prices falling to TZS 57,500/100kg. Tanzania also recorded the strongest medium- and long-term declines, with prices down 23.3% over three months, 36.1% over six months, and 20.7% year-on-year, reinforcing its position as one of the region's most competitive maize suppliers. Uganda and Rwanda recorded more moderate declines of 3.0% and 3.9%, respectively, reflecting improved supplies and stable market conditions. Overall, the data highlight widening price disparities across East Africa, with severe price inflation persisting in Ethiopia and South Sudan, while favourable harvests and improved market availability continue to exert downward pressure on maize prices in Kenya, Tanzania, Uganda, and Rwanda.

Table 7: Percentage changes in maize prices in East Africa²⁷

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Maize (Quintal)	Bahir Dar kebele, Retail, ETB/100kg	6,875.00	14.58 ↑	30.95 ×	59.88 ×	52.78 ×
Ethiopia	White Maize (Quintal)	National average, Retail, ETB/100kg	7,105.00	6.81 ↑	17.09 ×	49.40 ×	59.78 ×
Kenya	Maize	National Average, Retail, KES/KG	51.61	-10.03 ↓	-8.14 ↓	-6.82 ↓	-2.82 ↘
Rwanda	Maize	National Average, Retail, RWF/Kg	584.12	-3.94 ↘	-6.44 ↓	-4.15 ↘	2.72 ▲
South Sudan	Maize (white)	National Average, Retail, SSP/Kg*	8,155.33	10.78 ↑	57.06 ×	99.14 ×	48.71 ×
Tanzania	Maize (Mahindi)	National Average, Wholesale, TZS/100KG	57,500.00	-4.17 ↘	-23.33 ↓	-36.11 ↓	-20.69 ↓
Uganda	Maize	National Average, Retail, UGX/Kg	1,562.24	-3.04 ↘	-17.68 ↓	10.53 ↑	-19.48 ↓

Note: Latest price is for August 2026, * July 2026, and ** June 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 6: National average price spreads for rice across select East African Countries²⁸

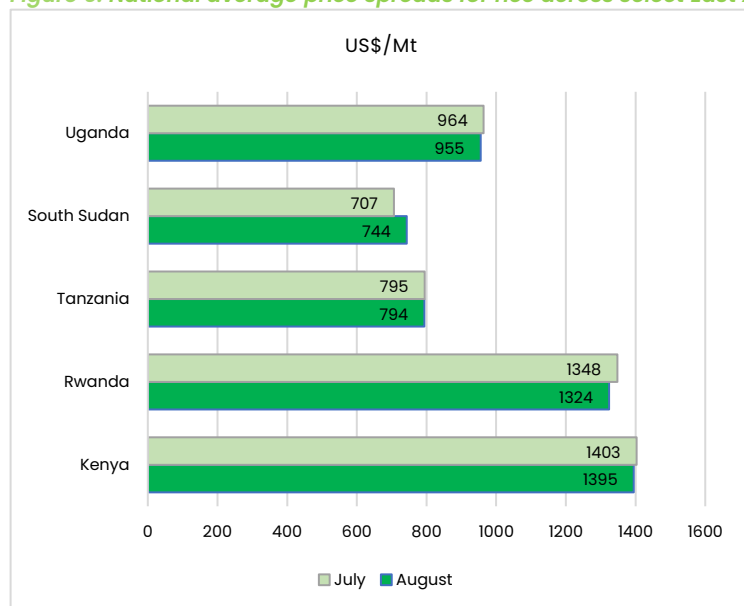


Figure 6 presents rice prices (USD per metric tonne) across selected East African countries, showing broadly stable conditions with modest declines in most markets. South Sudan was the only market to record a notable increase, while Kenya remained the highest-priced market.

Kenya remained the region's highest-priced rice market despite a slight 0.6% decline, with prices easing from USD 1,403/MT to USD 1,395/MT. The high price level reflects sustained demand and continued reliance on imported rice.

Rwanda's rice prices fell by 1.8%, from USD 1,348/MT to USD 1,324/MT, suggesting improved availability supported by trade flows and domestic supplies. Uganda also declined marginally by 0.9%, from USD 964/MT to USD 955/MT, while Tanzania remained almost unchanged at USD 794/MT, reflecting stable

supply conditions and continued price competitiveness. South Sudan recorded the only notable increase, with rice prices rising by 5.2%, from USD 707/MT to USD 744/MT. The increase likely reflects tighter supplies, higher transport costs, and persistent market access constraints, although South Sudan remained the lowest-priced monitored market.

²⁷ 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

²⁸ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

Table 8 presents rice price trends in local currencies across selected East African countries, showing mixed market conditions, with sharp price increases in some markets and more moderate declines in others. The most notable increase was recorded for Kenya's Komboka rice, where prices surged by 60.6% month-on-month to KES 192.40/kg. Prices were also substantially higher than three months ago (+56.5%), six months ago (+56.5%), and one year earlier (+51.1%), indicating significant market tightening and supply pressures. By contrast, Kenya's Pishori rice remained relatively stable, declining marginally by 0.6% to KES 179.19/kg. Despite the monthly decline, prices were slightly above levels recorded three months (+0.2%) and six months (+2.1%) earlier, although they remained 1.1% lower than a year ago. In South Sudan, rice prices increased sharply by 16.9% month-on-month to SSP 4,127.56/kg, the largest increase among the monitored markets after Kenyan Komboka rice. Strong price growth was also observed over longer periods, with prices rising by 28.5% over three months, 42.5% over six months, and 43.3% year-on-year, reflecting persistent inflationary pressures, high transaction costs, and tightening market supplies.

Conversely, Rwanda recorded a 1.4% decline in rice prices to RWF 1,940.63/kg, while prices remained 4.5% higher than six months ago and 26.8% above year-earlier levels, suggesting that underlying market conditions remain relatively firm despite recent easing.

In Tanzania, rice prices remained unchanged during the month at TZS 210,000 per 100kg, although they were significantly lower than three months ago (-8.7%), six months ago (-16.8%), and one year ago (-3.5%), reflecting adequate supplies from recent harvests and relatively stable market conditions. In Uganda, trends varied by rice variety. Kaiso rice prices declined by 3.9% to UGX 3,580.24/kg and remained below levels recorded three months ago (-3.6%), six months ago (-3.0%), and one year earlier (-1.0%), indicating sustained market stability. In contrast, Super rice prices increased by 1.8% to UGX 4,832.54/kg and were also higher than three months ago (+1.3%), six months ago (+2.7%), and one year earlier (+7.6%), suggesting stronger demand for higher-value rice varieties.

Table 8: Percentage changes in rice prices in East Africa²⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Rice_komboka	National Average, Retail, KES/KG	192.40	60.63 ⬆	56.46 ⬆	56.51 ⬆	51.14 ⬆
Kenya	Rice_pishori	National Average, Retail, KES/KG	179.19	-0.58 ⬇	0.21 ⬆	2.05 ⬆	-1.10 ⬇
Rwanda	Rice	National Average, Retail, RWF/Kg	1,940.63	-1.44 ⬇	-5.43 ⬇	4.48 ⬆	26.82 ⬆
South Sudan	Rice	National Average, Retail, SSP/Kg*	4,127.56	16.91 ⬆	28.52 ⬆	42.53 ⬆	43.31 ⬆
Tanzania	Rice (Mchele)	National Average, Wholesale, TZS/100KG	210,000.00	0.00 ●	-8.70 ⬇	-16.83 ⬇	-3.45 ⬇
Uganda	Rice_kaiso	National Average, Retail, UGX/Kg	3,580.24	-3.87 ⬇	-3.62 ⬇	-2.98 ⬇	-0.97 ⬇
Uganda	Rice_super	National Average, Retail, UGX/Kg	4,832.54	1.79 ⬆	1.25 ⬆	2.65 ⬆	7.57 ⬆

Note: Latest price is for August 2026, * July 2026, and ** June 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 7: National average price spreads for beans across select East African Countries³⁰

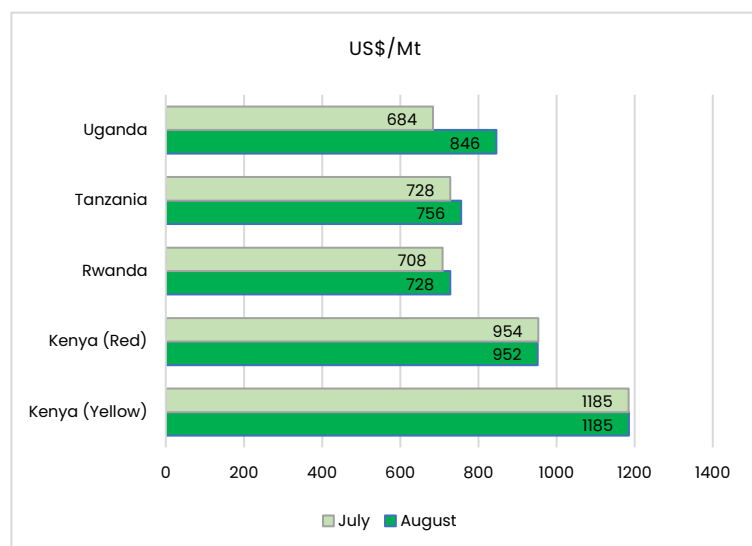


Figure 7 presents bean prices (USD per metric tonne) across selected East African markets, showing a generally upward trend between July and August, reflecting tightening supplies and sustained demand in several countries. Uganda recorded the largest increase, with prices rising from USD 684/MT to USD 846/MT, while Tanzania registered a 3.7% increase, from USD 728/MT to USD 756/MT, indicating strengthening market conditions despite continued regional competitiveness. Similarly, Rwanda posted a 2.7% increase, with prices rising from USD 708/MT to USD 728/MT, supported by tightening domestic supplies and active regional trade flows.

In Kenya, bean prices remained broadly stable. Yellow beans recorded no month-on-month

²⁹ 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

³⁰ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

change, remaining at USD 1,185/MT, indicating balanced market conditions and stable supply. Red bean prices increased marginally by 0.2%, rising from USD 952/MT to USD 954/MT, reflecting slight upward pressure from domestic demand. Despite the minimal increase, the market remained relatively stable compared to other countries in the region.

Table 9 presents bean prices across selected East African markets, showing mixed short-term movements and varying longer-term trends. In Kenya, bean prices remained largely stable during the reference month. Wairimu beans declined marginally by 0.2% month-on-month to KES 122.24/kg, while yellow beans increased slightly by 0.1% to KES 152.25/kg. Despite the relative stability in the short term, both varieties remained below their levels of three and six months earlier. On an annual basis, Wairimu and yellow bean prices were 4.7% and 5.9% lower, respectively, indicating continued easing in the Kenyan bean market compared to the previous year.

In Rwanda, bean prices rose by 3.2% month-on-month to RWF 1,067/kg, suggesting some tightening in market supplies during the month. However, prices were still 3.0% lower than three months ago. Compared to the same period last year, prices remained 4.7% higher, indicating that despite recent fluctuations, the market continues to trade above year-earlier levels. Similarly, Tanzania recorded a 3.9% monthly increase, with bean prices reaching TZS 200,000 per 100 kg. Nevertheless, the recent rise did not reverse the broader downward trend. Prices were 1.2% lower than three months ago, 9.1% lower than six months ago, and 13.0% below year-ago levels, reflecting sustained medium- and long-term market weakness despite the short-term recovery.

In Uganda, bean prices increased sharply by 24.8% month-on-month to UGX 3,171/kg, marking the strongest monthly gain among the monitored markets. Prices were also significantly higher than three and six months earlier, rising by 23.0% and 15.1%, respectively. However, despite these substantial medium-term gains, prices remained 0.8% below their level a year earlier, indicating that the recent surge has not yet fully offset the declines recorded over the past year.

Table 9: Percentage changes in bean prices in East Africa³¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Kenya	Beans_wairimu	National Average, Retail, KES/KG	122.24	-0.21 ↘	-1.45 ↘	-1.18 ↘	-4.65 ↘
Kenya	Beans_yellow	National Average, Retail, KES/KG	152.25	0.07 ↗	-0.35 ↘	-3.63 ↘	-5.93 ↘
Rwanda	Beans	National Average, Retail, RWF/Kg	1,067.35	3.18 ↗	-2.99 ↘	21.85 ⚡	4.66 ↗
Tanzania	Beans (Maharage)	National Average, Wholesale, TZS/100KG	200,000.00	3.90 ↗	-1.23 ↘	-9.09 ↘	-13.04 ↘
Uganda	Beans	National Average, Retail, UGX/Kg	3,170.83	24.75 ⚡	22.97 ⚡	15.09 ⚡	-0.77 ↘

Note: Latest price is for August 2026, * July 2026, and ** June 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 8: National average price spreads for wheat across select East African Countries

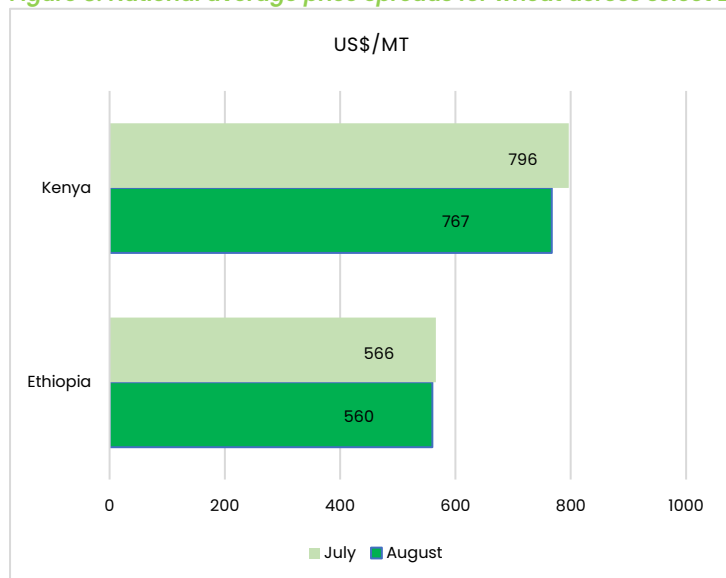


Figure 8 presents wheat prices (in USD per metric tonne) across Kenya and Ethiopia, showing modest declines between July and August in both countries, suggesting improved supply conditions and reduced market pressure. Kenya remained the highest-priced wheat market in the region despite a 3.6% month-on-month decline, with prices falling from USD 796/MT to USD 767/MT. The decrease likely reflects improved import availability and easing pressure from millers' demand, although prices remain elevated due to the country's continued dependence on imported wheat. Similarly, Ethiopia recorded a marginal 1.1% decline, with prices easing from USD 566/MT to USD 560/MT. The slight reduction suggests relatively stable domestic supplies, supported by local production and ongoing efforts to increase wheat self-sufficiency.

³¹ Author's construction based on 1) FAO data for Rwanda & Uganda, 2) National MIS Kenya & Tanzania

Table 10 shows wheat prices in local currencies for two selected East African countries, indicating broadly stable or declining short-term trends, with differing medium-term patterns. In Ethiopia, wheat prices in Bahir Dar Kebele remained unchanged over the past month, three months, six months, and year, reflecting highly stable market conditions. Nationally, prices declined slightly by 1.1% month-on-month to ETB 8,997.62 per 100 kg, but remained 1.2% higher over three months, 14.4% higher over six months, and 11.9% above year-earlier levels. This suggests that, despite recent easing, wheat prices remain elevated by historical standards, reflecting underlying inflationary pressures and sustained domestic demand.

In Kenya, the national average wheat price fell by 3.7% month-on-month to KES 98.55/kg, continuing a downward trend observed across longer time horizons. Prices declined by 5.2% over three months, 3.3% over six months, and 3.0% year-on-year, indicating gradual market easing, likely supported by improved import availability and stable domestic supply conditions.

Table 10: Percentage changes in wheat prices in East Africa³²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Ethiopia	White Wheat (Quintal)	Bahir Dar kebele, Retail, ETB/100kg	10,000.00	0.00	0.00	0.00	0.00
Ethiopia	White Wheat (Quintal)	National average, Retail, ETB/100kg	8,997.62	-1.12	1.22	14.35	11.90
Kenya	Wheat	National Average, Retail, KES/KG	98.55	-3.65	-5.16	-3.32	-3.02

Note: Latest price is for August 2026, * July 2026, and ** June 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 Conditions³³

In **Eastern Africa**, cereal production prospects remain mixed. Harvesting of main-season cereals is nearing completion in southern areas, while crops in northern areas are still developing. Below-average rainfall, prolonged dry spells, and high temperatures have adversely affected crop conditions in **Sudan, South Sudan, Ethiopia, Somalia, Kenya**, and northeastern Uganda, raising concerns over reduced yields. Particularly in **Ethiopia** and **Kenya**, rainfall deficits during critical growing periods are expected to negatively impact production outcomes.

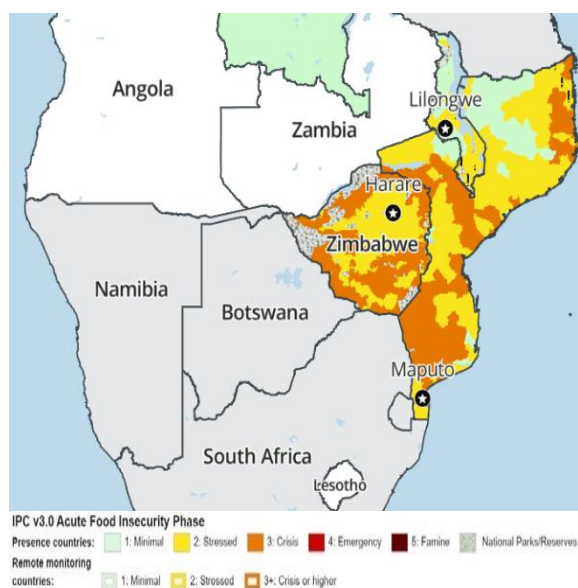
In contrast, some areas have experienced more favorable conditions. **Uganda's** central and southern bimodal regions recorded adequate crop development despite lower-than-normal rainfall, while **Tanzania's** Masika season harvest concluded under generally favorable conditions. However, severe drought conditions in Uganda's Karamoja region led to substantial crop losses, underscoring the continued vulnerability of the region's food production systems to climate variability and emerging El Niño conditions.

³² Author's construction based on 1) FAO data for Rwanda, South Sudan & Uganda, 2) National MIS Ethiopia, Kenya & Tanzania

³³ Crop Monitor No. 116 – June 2026: https://www.cropmonitor.org/s/EarlyWarning_CropMonitor_202606-x95c.pdf

Southern Africa Food Security Update

Figure 9: Southern Africa Countries Food Security Outlook, August 2026



Key food security trends in **Malawi** indicate a worsening outlook for vulnerable households, particularly in southern and parts of central Malawi, where Crisis (IPC Phase 3) outcomes are expected to emerge between October 2026 and January 2027 due to reduced purchasing power, limited agricultural labour opportunities, and persistently high food prices.³⁴ While much of the remaining southern and central regions are expected to remain Stressed (IPC Phase 2), many households will continue struggling to meet essential non-food needs. The anticipated persistence of strong El Niño conditions is likely to result in below-average and poorly distributed rainfall, reducing agricultural labour demand, crop production, pasture conditions, and water availability, especially in southern areas. At the same time, rising maize prices continue to constrain food access for market-dependent households, while a projected sharp decline in tobacco revenues, Malawi's main source of foreign exchange, is expected to worsen foreign currency shortages and limit the importation of essential commodities,

including fuel, medicines, and agricultural inputs

Mozambique's food security situation is expected to remain mixed through January 2027, with Crisis (IPC Phase 3) outcomes persisting in conflict-affected areas of Cabo Delgado and northern Nampula due to ongoing insurgent activity, displacement, market disruptions, and constrained access to food and livelihoods.³⁵ In contrast, most southern and central areas are expected to remain in Stressed (IPC Phase 2) conditions through September, supported by remaining household food stocks and ongoing second-season production, which has benefited from favourable rainfall and improved crop conditions. However, as the lean season begins and food stocks decline, some areas are likely to deteriorate to Crisis (IPC Phase 3) between October and January, driven by high staple food prices and weakened purchasing power. Looking ahead, a strong El Niño is expected to increase drought risks, particularly in southern and central regions, with delayed and below-average rainfall, higher temperatures, reduced crop and livestock production, and lower agricultural labour opportunities likely to further constrain household food and income access.

Zambia's food security situation is generally stable, with Minimal (IPC Phase 1) outcomes prevailing across most of the country due to adequate food stocks from the 2026 harvest and abundant maize supplies.³⁶ However, Stressed (IPC Phase 2) conditions are expected in parts of Western, Southern, and eastern Zambia through January 2027, where below-average harvests and restrictions related to Foot and Mouth Disease have reduced income from livestock sales and labour opportunities, weakening household purchasing power. Conditions are expected to deteriorate somewhat during the lean season (October to January) as household food stocks decline and poor households become increasingly reliant on markets, while below-average agricultural labour opportunities further constrain incomes. Although households are expected to meet their minimum food needs, many will struggle to afford essential non-food expenditures. Looking ahead, the strong El Niño is expected to bring delayed and below-average rainfall, particularly in southern and western Zambia, potentially reducing crop production, labour demand, and household incomes, while the Food Reserve Agency's maize procurement program is expected to help stabilize maize prices and support market availability.

Zimbabwe's food security conditions are expected to worsen through January 2027, with Crisis (IPC Phase 3) outcomes emerging in the most affected deficit-producing areas from around October as household food stocks become depleted and dependence on markets increases amid high staple food prices and below-average incomes.³⁷ While national maize production was above average in 2026, access to staple foods remains constrained in deficit areas due to limited grain movement from surplus-producing regions and persistently elevated maize prices. Stressed (IPC Phase 2) outcomes are expected to persist across other deficit-producing areas and expand into less productive parts of surplus-producing regions as household purchasing power continues to weaken. Food access is being further undermined by below-average remittance inflows, particularly in southern Zimbabwe, linked

³⁴ <https://fews.net/southern-africa/malawi>

³⁵ <https://fews.net/southern-africa/mozambique>

³⁶ <https://fews.net/southern-africa/zambia>

³⁷ <https://fews.net/southern-africa/zimbabwe>

to reduced employment opportunities and the return of migrants from South Africa. Looking ahead, strong El Niño conditions are expected to negatively affect agricultural labour opportunities, livestock production, water and pasture availability, and household incomes, increasing pressure on food markets and further exacerbating food insecurity.

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 10: National average price spreads for maize across select Southern African Countries³⁸

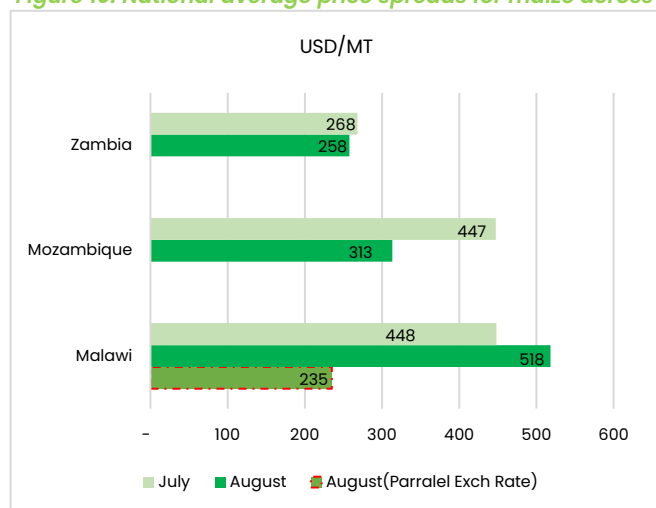


Figure 10 illustrates maize price movements (in USD per metric tonne) across selected Southern African markets, comparing July and August prices. The data show mixed market trends, with maize prices increasing in Malawi while declining in Zambia and Mozambique.

Malawi recorded the only increase among the monitored markets with maize prices rising by 15.6%, from USD 448/MT to USD 518/MT. This substantial increase reflects continued tight domestic supplies as the country enters its lean season and strong demand from households, traders, grain processors, and public grain procurement programmes. However, when adjusted using the parallel exchange rate, the August price is estimated at USD 235/MT, making Malawi the lowest-priced maize market in the region despite the

reported month-on-month increase based on the official exchange rate.

In contrast, Mozambique registered the steepest decline, with maize prices falling by 30.0%, from USD 447/MT to USD 313/MT. The significant reduction suggests improved market availability following harvest inflows, adequate supplies in key surplus-producing areas, and reduced pressure on consumer markets. Zambia also recorded a decline, although more moderate, with prices decreasing by 3.7% from USD 268/MT to USD 258/MT. The decline likely reflects increased market supplies from the recent harvest, seasonal stock replenishment, and continued availability of maize in major producing regions.

Despite the sharp decline in August, Mozambique remained one of the higher-priced maize markets in the region at USD 313/MT, while Zambia recorded the lowest nominal market price at USD 258/MT. However, when Malawi's August price is adjusted using the parallel exchange rate (USD 235/MT), Malawi becomes the lowest-priced maize market among the countries monitored.

Table 11 summarises maize price trends across selected Southern African countries, showing mixed short-term trends but a generally declining pattern over the medium to long term. Malawi is the only monitored country to record a month-on-month increase, while Mozambique and Zambia experience price declines. In Malawi, maize prices increased by 15.5% month-on-month to MWK 893.08/kg, reflecting continued tight domestic supplies and strong market demand. Despite the recent increase, prices remained 7.3% lower than six months ago and 29.0% below year-earlier levels, suggesting that market conditions have improved considerably compared to the previous year. However, prices were still 9.8% higher than three months ago, indicating some recent tightening in market availability.

By contrast, Mozambique recorded the sharpest monthly decline among the monitored countries, with white maize

³⁸ These price spreads are calculated based on online rates at: <https://www.oanda.com/currency-converter/en>

prices falling by 29.9% to MZN 19.81/kg. Prices were also slightly below levels recorded three months ago (-0.9%) and six months ago (-3.9%), pointing to improved market supplies and easing price pressures. Nevertheless, prices remained 10.7% above year-earlier levels, suggesting that maize markets have not yet fully recovered from the effects of earlier supply constraints and production challenges. In Zambia, white maize prices declined by 2.4% month-on-month to ZMW 4.87/kg. Prices were also substantially lower than three months ago (-23.1%), six months ago (-38.5%), and one year earlier (-12.7%). These declines reflect improved national maize supplies following the 2026 harvest and increased market availability. However, the Food Reserve Agency's (FRA) announced purchase price of ZMW 347 per 50kg bag (equivalent to ZMW 6.94/kg) remains well above prevailing market prices and may exert upward pressure on prices as public procurement activities expand.

Overall, maize markets across Southern Africa are generally benefiting from improved supply conditions and lower prices compared with previous periods. While Malawi continues to experience short-term price increases, both Mozambique and Zambia show evidence of easing market pressures, with Zambia recording the most pronounced medium- and long-term declines among the countries monitored.

Table 11: Percentage changes in maize prices in Southern Africa³⁹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Maize	National Average, MWK/Kg	893.08	15.53 ⬆	9.83 ⬆	-7.32 ⬆	-28.99 ⬆
Mozambique	Maize (white)	National Average, MZN/Kg	19.81	-29.92 ⬆	-0.86 ⬆	-3.90 ⬆	10.72 ⬆
Zambia	Maize (white)	National Average, Retail, ZMW/KG	4.87	-2.43 ⬆	-23.10 ⬆	-38.53 ⬆	-12.72 ⬆

Note: Latest price is for August 2026, * July 2026, and ** June 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 11: National average price spreads for rice across select Southern African Countries

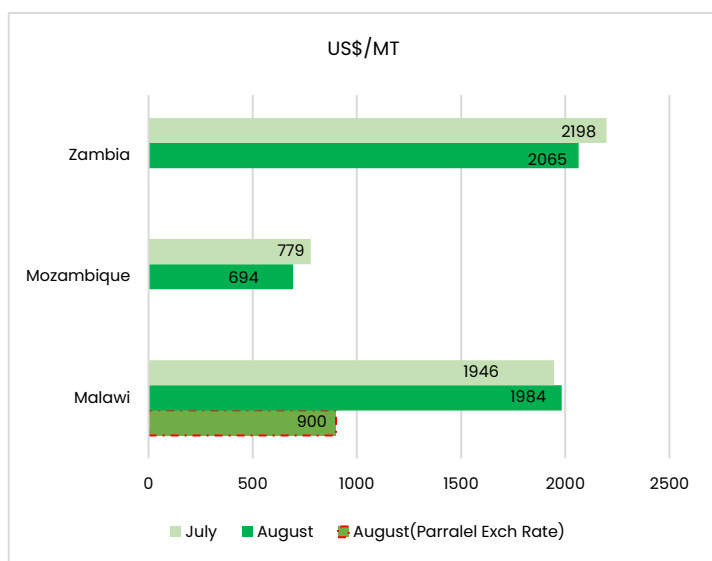


Figure 11 illustrates rice price movements (in USD per metric tonne) across Zambia, Mozambique, and Malawi, comparing July and August prices. The data show a mixed pattern, with rice prices increasing in Malawi while declining in Zambia and Mozambique. Malawi recorded the largest increase among the monitored countries, with rice prices rising by 2.0% from USD 1,946/MT in July to USD 1,984/MT in August. The increase suggests continued firm market demand and limited domestic rice supplies. However, when valued using the parallel exchange rate, the August price is estimated at USD 900/MT, significantly lower than the official exchange rate equivalent and making Malawi more competitively priced within the region.

In Zambia, rice prices declined by 6.1%, falling from USD 2,198/MT in July to USD 2,065/MT in August. The decrease

likely reflects improved market availability, increased trader stocks, and reduced seasonal pressure. Despite the decline, Zambia remained the highest-priced rice market among the countries monitored, with prices substantially above those observed in Malawi and Mozambique. Similarly, Mozambique recorded a decline of 10.9%, with prices falling from USD 779/MT to USD 694/MT between July and August. The decline suggests improved supply conditions and reduced import cost pressures compared to the previous month. Despite the reduction, Mozambique continued to maintain the lowest rice prices among the monitored countries.

Local currency rice prices across selected Southern African countries exhibited mixed short-term trends but generally lower prices over the medium to long term (**Table 12**). Malawi was the only monitored country to record a month-on-month increase, while Mozambique and Zambia experienced price declines. In Malawi, rice prices increased by 1.8% month-on-month to MWK 3,419.20/kg, suggesting some tightening in market supplies and sustained consumer demand. Despite the recent increase, prices remained below levels recorded three months ago (-3.6%), six months ago (-9.5%), and one year earlier (-13.2%), indicating that market conditions remain significantly improved compared

³⁹ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia and Zimbabwe

to previous periods.

In Mozambique, imported rice prices recorded the sharpest monthly decline among the monitored countries, falling by 10.8% to MZN 43.88/kg. Prices were also substantially lower than those observed three months ago (-22.2%), six months ago (-27.7%), and one year ago (-24.7%). The sustained declines suggest improved import availability, lower market pressures, and generally favourable supply conditions compared to earlier periods. Similarly, Zambia recorded a modest 1.1% month-on-month decline, with local rice prices decreasing to ZMW 40.94/kg. Prices were also lower than three months ago (-5.5%), six months ago (-1.1%), and one year earlier (-2.5%), reflecting relatively stable market conditions and adequate domestic supplies.

Table 12: Percentage changes in rice prices in Southern Africa⁴⁰

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Rice	National Average, MWK/Kg	3,419.20	1.84 ▲	-3.55 ▾	-9.50 ↓	-13.16 ↓
Mozambique	Rice (imported)	National Average, MZN/Kg	43.88	-10.81 ↓	-22.17 ↓	-27.65 ↓	-24.74 ↓
Zambia	Rice (Local)	National Average, Retail, ZMW/KG	40.94	-1.13 ▾	-5.54 ↓	-1.11 ▾	-2.52 ▾

Note: Latest price is for August 2026, * July 2026, and ** June 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

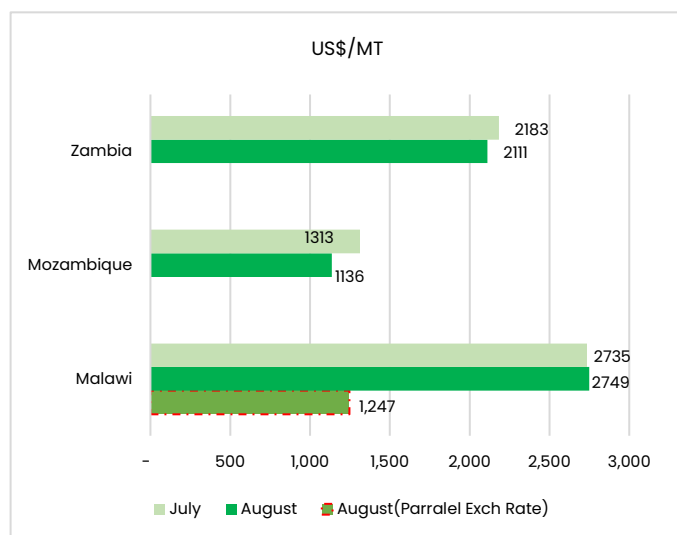


Figure 12: National average price spreads for beans across select Southern African Countries

Figure 12 presents national average bean prices (USD per metric tonne) for selected Southern African countries, showing mixed market movements. Malawi continued to record the highest bean prices in the region, with prices rising marginally by 0.5% from USD 2,735/MT to USD 2,749/MT. The increase suggests continued supply tightness and sustained consumer demand. However, when converted using the parallel exchange rate, the price falls significantly to approximately USD 1,247/MT, making Malawi the lowest-priced bean market among the monitored countries on a parallel exchange rate basis.

In contrast, Mozambique recorded the sharpest decline, with bean prices falling by 13.5% from USD 1,313/MT to USD 1,136/MT. This decline likely reflects improved domestic

supplies following harvests, stable market availability, and continued cross-border inflows that helped ease price pressures. Zambia also registered a modest decline of 3.3%, with prices decreasing from USD 2,183/MT to USD 2,111/MT. The reduction suggests improved market availability and increased supplies, contributing to weaker price pressure compared to the previous month. Despite the slight increase, Malawi remained the highest-priced bean market at the official exchange rate, with prices substantially above those recorded in Zambia and Mozambique. Conversely, Mozambique remained the lowest-priced market among the three countries when official exchange rates are applied, highlighting relatively better market availability and lower consumer prices within the region.

Table 13 presents bean and soybean prices in local currencies across selected Southern African countries, showing mixed short-term trends and varying patterns over the medium and long term. While some commodities recorded recent price increases, most remained below levels observed six months and one year earlier, reflecting improved market supplies and availability across the region. In Malawi, bean prices increased marginally by 0.4% month-on-month to MWK 4,738.52/kg, while soybean prices recorded a stronger increase of 7.7% to MWK 2,608.71/kg. The rise in soybean prices was the largest monthly increase among the monitored commodities and may reflect seasonal tightening of supplies and stronger demand from processors. Despite these recent gains, both commodities remained significantly below levels recorded six months earlier, with bean and soybean prices declining by 18.2% and 18.2%, respectively. Compared to the same period last year, bean prices were 29.8% lower, while soybean prices were only 1.8% lower, indicating that soybean prices have remained relatively resilient over the past year. However, both commodities were higher than three months ago, rising by 12.4% for beans and 14.3% for soybeans, suggesting some

⁴⁰ Author's construction based on AGRA MIS data for Malawi and Mozambique, and FAO data for Zambia

recent market tightening.

In Mozambique, bean prices declined sharply by 13.5% month-on-month to MZN 71.81/kg, representing the steepest monthly decline among the monitored markets. Prices were also lower than three months ago (-11.8%) and six months ago (-16.3%), indicating improved market availability and easing supply pressures. Despite these recent declines, bean prices remained 10.4% higher than a year earlier, suggesting that underlying market conditions are still firmer than during the same period last year. In Zambia, bean prices fell by 2.8% during the month to ZMW 40.65/kg, continuing a downward trend observed over the past three months (-15.8%) and six months (-11.1%). The persistent declines point to improved domestic supplies and favourable market conditions following recent production gains.

Table 13: Percentage changes in beans prices in Southern Africa⁴¹

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Malawi	Beans	National Average, MWK/Kg	4,738.52	0.43 ▲	12.36 ▲	-18.24 ▼	-29.80 ▼
Malawi	Soyabeans	National Average, MWK/Kg	2,608.71	7.67 ▲	14.29 ▲	-18.16 ▼	-1.76 ▬
Mozambique	Beans	National Average, MZN/Kg	71.81	-13.45 ▼	-11.83 ▼	-16.34 ▼	10.36 ▲
Zambia	Beans	National Average, Retail, ZMW/KG	40.65	-2.84 ▬	-15.80 ▼	-11.05 ▼	

Note: Latest price is for August 2026, * July 2026, and ** June 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 Conditions⁴²

In **Southern Africa**, harvesting of the 2025/26 main cereal season has concluded, and preparations for the 2026/27 season are underway, with planting expected to begin in October. Seasonal forecasts indicate an elevated likelihood of below-normal rainfall between October 2026 and January 2027, associated with ongoing El Niño conditions, raising concerns over delayed planting, reduced cropped area, and lower production prospects, particularly in the more drought-prone areas of Zambia, Zimbabwe, and southern Mozambique.

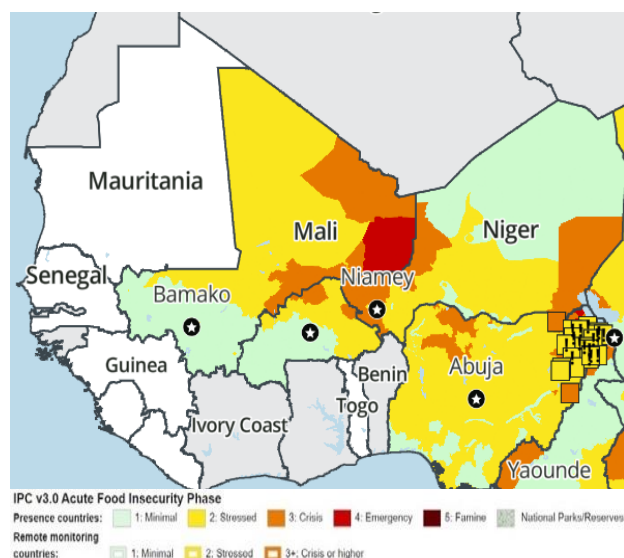
Despite these risks, crop production prospects remain favorable in parts of the region. Zambia and Zimbabwe are expected to benefit from strong residual soil moisture, adequate reservoir levels, and improved irrigation water availability following a favorable 2025/26 season. In Zambia, the absence of power-related irrigation disruptions and improved water levels in the Kariba Dam are expected to support production. Meanwhile, the greatest climate-related risks are concentrated in southern and central Mozambique, where below-average rainfall, prolonged dry spells, and high temperatures could constrain agricultural production, while northern areas are forecast to receive near-average rainfall. Overall, the region faces a mixed outlook, with favorable production potential in some areas offset by growing climate risks linked to El Niño.

⁴¹ Author's construction based on AGRA MIS data for Malawi and Mozambique, and Zambia Statistics Agency data for Zambia

⁴² Crop Monitor No. 119 – September 2026: [EarlyWarning_CropMonitor_202609.pdf](#)

West Africa Food Security Update

Figure 13: West African Countries Food Security Outlook, August 2026



Burkina Faso continues to face significant food security challenges, particularly in northern and eastern provinces affected by insecurity. Karo Peli province is expected to remain in Crisis (IPC Phase 3) through January, as limited harvests, reduced cultivated areas, and insufficient incomes leave households unable to meet food needs, forcing them to reduce meal quantity and frequency despite ongoing assistance.⁴³ In other insecure provinces, Stressed! (IPC Phase 2!) outcomes will persist, with humanitarian food distributions helping to offset food consumption gaps, although household livelihoods remain weak and domestic production will be insufficient to fully recover losses caused by insecurity. Nationally, delayed and irregular rainfall has extended the lean season, postponed the availability of green harvests, reduced planted cereal areas, and raised concerns that prolonged dry spells could further lower crop yields and production prospects, increasing the risk

of continued food insecurity.

Key food security trends in **Côte d'Ivoire** indicate that Stressed (IPC Phase 2) outcomes are expected to persist in the northern regions of Bounkani and Tchologo through January 2026, despite seasonal improvements from the August/September harvests of maize and tubers.⁴⁴ While increased food availability will support household access and allow some stock replenishment, the growing refugee population and pressure on host-community resources will continue to constrain recovery. At the same time, rising diesel prices, higher transport costs, cross-border trade restrictions, and the suspension of livestock exports from Burkina Faso are maintaining upward pressure on food and meat prices, reducing the purchasing power of poor households, particularly in the north. Supply chain disruptions are expected to prolong market pressures in both northern and southern urban centres. In contrast, the cocoa-producing western and southwestern areas are expected to maintain Minimal (IPC Phase 1) food insecurity outcomes, although household incomes and purchasing power will depend on cocoa prices and marketing volumes during the upcoming season.

Mali's food security situation remains highly uneven, with the most severe conditions concentrated in conflict-affected northern regions. Emergency (IPC Phase 4) outcomes persist in Kidal and Ménaka due to insecurity-driven disruptions to livelihoods, economic activity, and market access, although Ménaka is expected to improve to Crisis (IPC Phase 3) from October as harvests and wild foods become available, while Kidal is likely to remain in Emergency through January 2027.⁴⁵ Nationally, cereal and cotton planting areas are below last year's levels because of poor early-season rainfall, limited access to agricultural inputs, and insecurity, reducing production prospects and income opportunities in some areas. However, from October onward, the arrival of new harvests, in-kind payments, and seasonal food price declines is expected to improve food access, leading to more widespread Minimal (IPC Phase 1) outcomes in southern and western Mali and an improvement from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) in many conflict-affected areas, although weakened livelihoods and ongoing insecurity will continue to force households to rely on coping strategies.

Niger is expected to face persistent food security challenges through January 2027, particularly in the conflict-affected regions of Tillabéri, Diffa, and northwestern Tahoua, where Crisis (IPC Phase 3) outcomes will continue due to insecurity, population displacement, and the loss of agricultural land and livestock, limiting household access to food and income.⁴⁶ Poor households are likely to experience food consumption deficits and rely on negative coping strategies such as increased borrowing and reduced spending on healthcare, while some displaced households with severe asset losses are expected to face Emergency (IPC Phase 4) conditions and resort to extreme measures, including begging and migration. Food security risks have been further compounded by localized flooding in several regions, causing damage to homes, infrastructure, and livestock, and by delayed and erratic rainfall that has reduced planting coverage, slowed crop development, and delayed pasture regeneration. However, improved rainfall conditions since early August have enhanced prospects for cereal and fodder production, offering some potential for

⁴³ <https://fews.net/west-africa/burkina-faso>

⁴⁴ <https://fews.net/west-africa/cote-divoire>

⁴⁵ <https://fews.net/west-africa/mali>

⁴⁶ <https://fews.net/west-africa/niger>

recovery later in the season.

Food security in **Nigeria** remain a major concern, particularly in conflict-affected northern areas where Emergency (IPC Phase 4) outcomes persist in the most inaccessible parts of Borno State and Crisis (IPC Phase 3) conditions are widespread across much of the north and are expected to continue into early 2027.⁴⁷ Ongoing attacks by non-state armed groups have disrupted livelihoods, restricted access to farmland and markets, and reduced agricultural production through abductions, destruction of crops, levies, and cultivation bans. Although macroeconomic indicators have improved in 2026, including lower inflation and greater exchange-rate stability, these gains have not translated into improved household purchasing power, as high fuel, transport, and staple food costs continue to keep food prices well above average levels during the lean season. Poor households, having largely exhausted their food stocks, are increasingly reliant on market purchases and wild foods. At the same time, worsening health conditions, particularly the large cholera outbreak affecting more than 50,000 people, are further undermining food security by increasing healthcare expenses and reducing labour availability, thereby constraining household incomes and worsening nutrition outcomes among vulnerable populations.

In **Togo**, Stressed (IPC Phase 2) outcomes are expected to persist in the northern regions of Kpendjal and West Kpendjal through January 2027.⁴⁸ Although a gradual improvement in security conditions has supported the resumption of agricultural activities, income-generating opportunities, and market access, livelihoods remain constrained by residual insecurity, population displacement, trade disruptions, and weak maize marketing opportunities. The arrival of new harvests from September is expected to improve food availability and household incomes, while generally favourable rainfall conditions are likely to support above-average agricultural production prospects during the 2026/27 season. However, poor households are expected to continue facing difficulties meeting essential non-food needs due to limited incomes, and some very poor households, refugees, and internally displaced persons are likely to remain in Crisis (IPC Phase 3), particularly in Kpendjal and West Kpendjal.

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

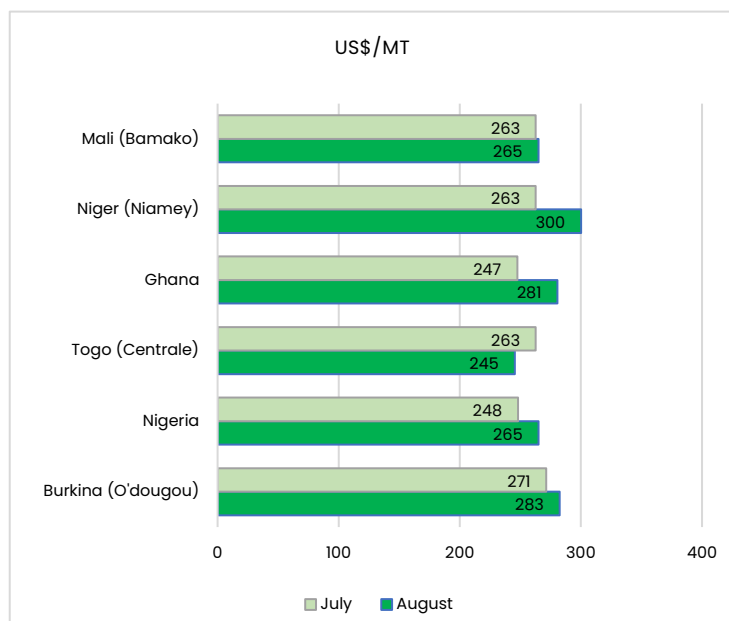
Figure 14 illustrates maize price movements (USD/metric tonne) across selected West African markets between July and August, showing predominantly increasing trends. Mali (Bamako) remained relatively stable, with prices increasing marginally by 0.8%, from USD 263/MT in July to USD 265/MT in August, indicating stable market conditions.

Price increases were observed in Niger (Niamey), Ghana, Nigeria, and Burkina Faso (Ouagadougou). The sharpest increase was recorded in Niger (Niamey), where prices rose by 14.1%, from USD 263/MT to USD 300/MT. Ghana followed with a 13.8% increase, with prices rising from USD 247/MT to USD 281/MT, reflecting tighter market supplies and seasonal pressures. Nigeria recorded a 6.9% increase, with prices rising from USD 248/MT to USD 265/MT, while Burkina Faso (Ouagadougou) posted a 4.4% increase, from USD 271/MT to USD 283/MT.

⁴⁷ <https://fews.net/west-africa/nigeria>

⁴⁸ <https://fews.net/west-africa/togo>

Figure 14: Price spreads for maize across select West African Countries⁴⁹



In contrast, Togo (Centrale) was the only monitored market to register a decline, with maize prices falling by 6.8% from USD 263/MT in July to USD 245/MT in August. The decline likely reflects improved local market supplies and increased availability following seasonal inflows.

Table 14 presents maize price trends in local currencies across selected West African countries, with mixed market conditions during the reporting period. In Burkina Faso, maize prices were generally stable to declining across monitored markets. Prices remained unchanged over the month in Bobo Dioulasso, Dori, and Kongoussi, while notable declines were recorded in Dédougou (-14.3%), Fada N'Gourma (-13.5%), and Nouna (-5.7%). Ouagadougou was the only market to register an increase, with prices rising by 3.2%. Despite these mixed monthly movements, all markets remained substantially below year-earlier

levels, with annual declines ranging from 20.0% to 40.0%, reflecting improved supplies and reduced market pressures compared to the previous year.

In Ghana, national average white maize prices increased by 8.9% month-on-month to GHS 3,141/MT. However, prices remained 8.9% lower than six months ago and 36.3% below year-earlier levels, suggesting that despite recent market tightening, overall supply conditions remain more favourable than a year ago. In Mali, maize prices exhibited mixed trends across monitored markets. Monthly increases were observed in Kayes (+10.0%) and Mopti (+2.6%), while prices remained stable in Bamako and Ségou. In contrast, Sikasso recorded a significant decline of 7.7%. Longer-term trends showed varying market conditions, with strong gains over six months in Kayes (+18.9%), Ségou (+16.7%), and Mopti (+8.3%), while most markets continued to register lower prices compared to the same period last year.

In Niger, imported maize prices showed mixed monthly movements across markets. Significant increases were recorded in Niamey (+13.3%), Tillabéri (+5.3%), and Agadez (+3.7%), while prices declined in Dosso (-5.6%) and Maradi (-2.9%). Strong upward trends were observed over the three- and six-month periods, particularly in Niamey (+21.4% and +13.3%), Maradi (+13.8% and +37.5%), and Agadez (+12.0% over three months), indicating tightening supplies and stronger market demand. Nevertheless, all monitored markets remained 25% to 35% lower than a year earlier, suggesting improved availability relative to the same period last year. In Nigeria, national average white maize prices increased by 5.2% month-on-month to NGN 355.29/kg. Prices were also 9.3% higher than three months ago and 19.3% above six-month levels, reflecting sustained upward market pressure. However, maize prices remained 10.9% lower than a year ago, indicating improved supplies compared to the previous year. In Togo, maize prices generally declined across monitored markets. Monthly decreases were recorded in Centrale (-7.7%), DAGL/Lomé Region (-8.6%), and Maritime (-8.4%), while Savanes registered a modest increase of 1.6%. Across all markets, prices remained substantially below year-earlier levels, with annual declines ranging from 16.8% to 36.5%, reflecting improved market availability and weaker price pressure compared to the same period last year.

Table 14: Percentage changes in maize prices in West Africa⁵⁰

⁴⁹ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

⁵⁰ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Togo

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Maize	Bobo Dioulasso, Wholesale, XOF/100 kg	15,500.00	0.00	0.00	3.33	-32.61
Burkina Faso	Maize	Dédougou, Wholesale, XOF/100 kg	15,000.00	-14.29	-9.09	-9.09	-40.00
Burkina Faso	Maize	Dori, Wholesale, XOF/100 kg	22,000.00	0.00	0.00	-12.00	-26.67
Burkina Faso	Maize	Fada N'gourma, Wholesale, XOF/100 kg	16,000.00	-13.51	-13.51	-13.51	-38.46
Burkina Faso	Maize	Kongoussi, Wholesale, XOF/100 kg	20,000.00	0.00	0.00	0.00	-20.00
Burkina Faso	Maize	Nouna, Wholesale, XOF/100 kg	16,500.00	-5.71	-5.71	-5.71	-26.67
Burkina Faso	Maize	Ouagadougou, Wholesale, XOF/100 kg	16,000.00	3.23	3.23	6.67	-23.81
Ghana	Maize (white)	National Average, (GHS/MT)	3,141.02	8.94	6.75	-8.87	-36.32
Mali	Maize	Bamako, Wholesale, XOF/100 kg	15,000.00	0.00	-6.25	-6.25	-25.00
Mali	Maize	Kayes, Wholesale, XOF/100 kg	22,000.00	10.00	22.22	18.92	-4.35
Mali	Maize	Mopti, Wholesale, XOF/100 kg	19,500.00	2.63	-2.50	8.33	-18.75
Mali	Maize	Ségou, Wholesale, XOF/100 kg	17,500.00	0.00	0.00	16.67	-12.50
Mali	Maize	Sikasso, Wholesale, XOF/100 kg	12,000.00	-7.69	-14.29	-11.11	-31.43
Niger	Maize (imported)	Agadez, Wholesale, XOF/100 kg	28,000.00	3.70	12.00	-6.67	-28.21
Niger	Maize (imported)	Dosso, Wholesale, XOF/100 kg	17,000.00	-5.56	13.33	-8.11	-34.62
Niger	Maize (imported)	Maradi, Wholesale, XOF/100 kg	16,500.00	-2.94	13.79	37.50	-25.00
Niger	Maize (imported)	Niamey, Wholesale, XOF/100 kg	17,000.00	13.33	21.43	13.33	-26.09
Niger	Maize (imported)	Tillabéri, Wholesale, XOF/100 kg	20,000.00	5.26	11.11	11.11	-25.93
Nigeria	Maize (white)	National Average, NGN/KG	355.29	5.21	9.28	19.33	-10.85
Togo	Maize (white), XOF/Kg	Centrale, Retail, XOF/Kg*	139.00	-7.33	-6.08	-15.24	-16.77
Togo	Maize (white), XOF/Kg	DAGL (Lomé) Region, Retail, XOF/Kg*	181.00	-8.59	-9.50	-16.59	-33.46
Togo	Maize (white), XOF/Kg	Maritime, Retail, XOF/Kg*	141.00	-8.44	-10.19	-17.06	-36.49
Togo	Maize (white), XOF/Kg	Savanes, Retail, XOF/Kg*	130.00	1.56	0.00	-18.24	-32.99

Note: Latest price is for August 2026, * July 2026, and ** June 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 15: Price spreads for rice across select West African Countries⁵¹

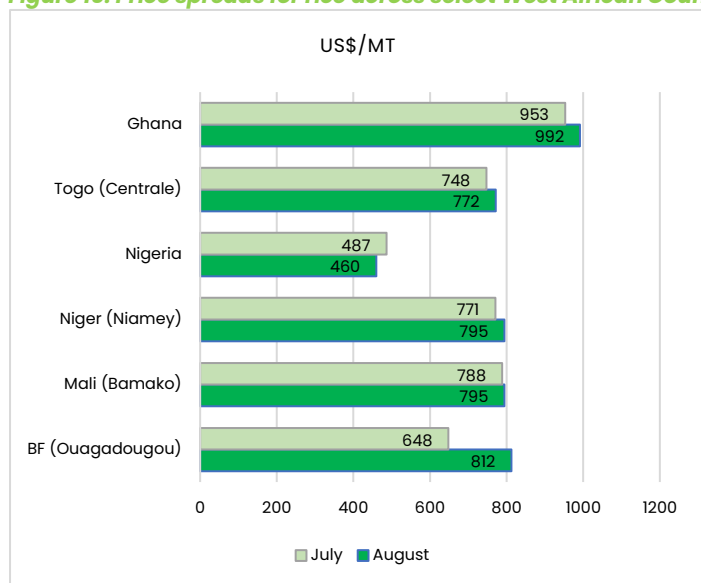


Figure 15 illustrates rice price movements (USD/metric tonne) across selected West African markets between July and August, showing broadly increasing trends across most monitored markets. Ghana remained the highest-priced rice market and recorded a 4.1% increase, with prices rising from USD 953/MT in July to USD 992/MT in August, reflecting stronger market demand and tightening supply conditions.

The most significant increase was observed in Burkina Faso (Ouagadougou), where prices surged by 25.3%, from USD 648/MT to USD 812/MT. This sharp rise may reflect tighter domestic supplies, increased marketing costs, or stronger regional demand. Togo (Centrale) also registered a notable increase of 3.2%, with prices rising from USD 748/MT to USD 772/MT, while Niger (Niamey) recorded a 3.1% increase, from USD 771/MT to USD 795/MT.

Meanwhile, Mali (Bamako) remained relatively stable, with prices increasing marginally by 0.9%, from USD 788/MT to USD 795/MT, indicating limited month-on-month market pressure.

In contrast, Nigeria was the only monitored market to record a decline, with rice prices falling by 5.5% from USD 487/MT in July to USD 460/MT in August. In addition, Nigeria remained the lowest-priced rice market among those monitored, suggesting improved market supply and availability.

Table 15 presents rice price trends in local currencies across selected West African markets. Generally, market conditions remain stable during the reporting month, although notable variations were observed across countries and markets. In Burkina Faso, imported rice prices remained unchanged in most monitored markets, including Bobo

⁵¹ These price spreads are calculated based on online rates on the last day of the month at <https://www.oanda.com/currency-converter/en>

Dioullasso, Dori, and Kongoussi. However, prices increased sharply in Ouagadougou (+24.3%) and Fada N'Gourma (+15.8%), indicating localized supply pressures. Despite these increases, longer-term trends were mixed. While Dori and Ouagadougou recorded increases relative to three and six months earlier, most markets remained below year-earlier levels, with annual declines ranging from 2.2% to 27.3%, suggesting generally improved market availability compared to the previous year.

In Ghana, the national average rice price remained stable at GHS 11,100/MT, showing no month-on-month change. Prices were slightly higher than three months earlier (+0.9%) but remained 10.1% below six-month levels and 16.4% lower than a year earlier, reflecting adequate domestic and imported rice supplies. In Mali, local rice prices were largely stable across the monitored markets. Kayes recorded a modest monthly increase of 1.9%, while prices in Bamako, Gao, Mopti, Ségou, and Sikasso remained unchanged from the previous month. Nevertheless, longer-term trends varied, with Gao posting significant increases of 20.0% over three months and 33.3% over six months. For imported rice, most markets remained stable during the month, although Bamako recorded a substantial monthly increase of 17.7%. On an annual basis, imported rice prices were generally lower than a year ago, with declines ranging from 4.8% to 22.0%, pointing to improved supply conditions.

In Niger, imported rice prices were mostly stable during the month. Niamey registered a moderate increase of 2.3%, while Agadez, Dosso, and Tillabéri remained unchanged month-on-month. Compared with three and six months earlier, prices increased by approximately 4.4% to 4.6% in several markets. Despite these gains, all monitored markets recorded annual declines of between 7.7% and 11.5%, indicating improved availability relative to the previous year. In Nigeria, the national average price of milled rice declined by 6.9% to NGN 616.94/kg. Prices were also lower than three months ago (-2.9%) and six months ago (-18.4%). On a year-on-year basis, rice prices were 31.8% below their level during the same period last year, suggesting improved supply conditions and reduced market pressure.

In Togo, imported rice prices showed generally upward monthly movements. Prices increased in Maritime (+5.8%), Savanes (+3.3%), Centrale (+2.3%), and DAGL (Lomé) (+0.3%). Longer-term trends were mixed, with Centrale and Maritime recording increases relative to six months earlier, while Savanes experienced slight declines. Annual trends remained mostly negative, with year-on-year declines ranging from 0.5% to 34.8% in most markets. However, Maritime was a notable exception, registering a 20.4% increase compared to the same period last year.

Table 15: Percentage changes in rice prices in West Africa⁵²

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Rice (imported)	Bobo Dioulasso, Wholesale, XOF/100 kg	32,500.00	0.00	0.00	0.00	-23.53
Burkina Faso	Rice (imported)	Dédougou, Wholesale, XOF/100 kg	37,000.00	-5.13	-7.50	-9.76	-26.00
Burkina Faso	Rice (imported)	Dori, Wholesale, XOF/100 kg	44,000.00	0.00	4.76	2.33	-8.33
Burkina Faso	Rice (imported)	Fada N'gourma, Wholesale, XOF/100 kg	44,000.00	15.79	15.79	15.79	-2.22
Burkina Faso	Rice (imported)	Kongoussi, Wholesale, XOF/100 kg	40,000.00	0.00	0.00	-5.88	-27.27
Burkina Faso	Rice (imported)	Ouagadougou, Wholesale, XOF/100 kg	46,000.00	24.32	24.32	29.58	15.00
Ghana	Rice	National Average, (GHS/MT)	11,100.00	0.00	0.91	-10.12	-16.38
Mali	Rice	Bamako, Wholesale, XOF/100 kg	45,000.00	0.00	0.00	7.14	0.00
Mali	Rice	Gao, Wholesale, XOF/100 kg	60,000.00	0.00	20.00	33.33	-7.69
Mali	Rice	Kayes, Wholesale, XOF/100 kg	53,000.00	1.92	1.92	1.92	1.92
Mali	Rice	Mopti, Wholesale, XOF/100 kg	41,000.00	0.00	-3.53	3.80	-16.33
Mali	Rice	Ségou, Wholesale, XOF/100 kg	40,000.00	0.00	-5.88	6.67	-5.88
Mali	Rice	Sikasso, Wholesale, XOF/100 kg	41,000.00	0.00	2.50	9.33	-8.89
Mali	Rice (imported)	Bamako, Wholesale, XOF/100 kg	40,000.00	17.65	17.65	3.90	-4.76
Mali	Rice (imported)	Gao, Wholesale, XOF/100 kg	48,000.00	0.00	-4.00	6.67	-14.29
Mali	Rice (imported)	Kayes, Wholesale, XOF/100 kg	29,500.00	0.00	0.00	-1.67	-10.61
Mali	Rice (imported)	Mopti, Wholesale, XOF/100 kg	39,000.00	0.00	-4.88	-7.14	-22.00
Mali	Rice (imported)	Ségou, Wholesale, XOF/100 kg	40,000.00	0.00	-5.88	-2.44	-4.76
Mali	Rice (imported)	Sikasso, Wholesale, XOF/100 kg	40,000.00	0.00	2.56	0.00	-16.67
Niger	Rice (imported)	Agadez, Wholesale, XOF/100 kg	48,000.00	0.00	4.35	4.35	-7.69
Niger	Rice (imported)	Dosso, Wholesale, XOF/100 kg	46,000.00	0.00	4.55	0.00	-11.54
Niger	Rice (imported)	Niamey, Wholesale, XOF/100 kg	45,000.00	2.27	2.27	2.27	-8.16
Niger	Rice (imported)	Tillabéri, Wholesale, XOF/100 kg	46,000.00	0.00	4.55	4.55	-8.00
Nigeria	Rice (milled)	National Average, NGN/KG	616.94	-6.86	-2.91	-18.37	-31.80
Togo	Rice (imported)	Centrale, Retail, XOF/Kg*	437.00	2.34	-1.35	6.59	-34.78
Togo	Rice (imported)	DAGL (Lomé) Region, Retail, XOF/Kg*	616.00	0.33	-4.79	5.12	-0.48
Togo	Rice (imported)	Maritime, Retail, XOF/Kg*	585.00	5.79	4.84	9.96	20.37
Togo	Rice (imported)	Savanes, Retail, XOF/Kg*	445.00	3.25	-0.45	-0.89	-4.30

Note: Latest price is for August 2026, * July 2026, and ** June 2026

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

⁵² Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

Millet

Figure 16: Price spreads for millet across select West African Countries⁵³

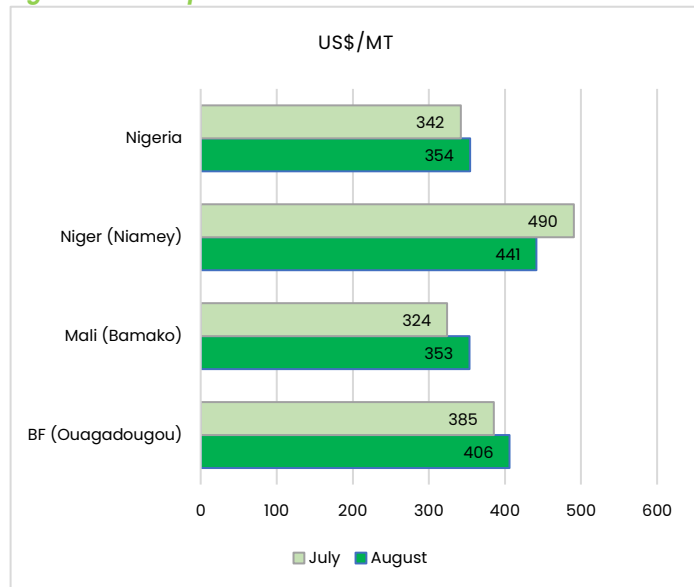


Figure 16 illustrates millet price movements (USD per metric tonne) across selected West African markets between July and August, indicating generally increasing trends, with the exception of Niger (Niamey). The strongest increase was recorded in Mali (Bamako), where millet prices rose by 9.0%, increasing from USD 324/MT in July to USD 353/MT in August. This increase suggests tightening market supplies and seasonal demand pressures.

Burkina Faso (Ouagadougou) also registered a notable increase of 5.5%, with prices rising from USD 385/MT to USD 406/MT, indicating firmer market conditions. Similarly, Nigeria recorded a moderate increase of 3.5%, with prices increasing from USD 342/MT to USD 354/MT, reflecting sustained market demand and relatively stable supply conditions.

In contrast, Niger (Niamey) was the only monitored market to record a decline during the reporting period. Millet prices fell by 10.0%, from USD 490/MT in July to USD 441/MT in August, suggesting improved market availability, replenished stocks, or reduced seasonal pressure. Despite the decline, Niger remained the highest-priced millet market among those monitored.

Table 16 presents millet price trends in local currencies across selected West African markets. Overall, prices displayed mixed short-term movements, but most markets continued to record prices below year-earlier levels, indicating relatively improved availability compared to the same period last year. In Burkina Faso, millet prices showed mixed month-on-month trends across the monitored markets. Price increases were recorded in Tenkodogo (+8.7%), Dédougou (+7.1%), and Ouagadougou (+4.6%), while declines were observed in Bobo Dioulasso (-20.6%), Fada N'Gourma (-14.3%), Nouna (-11.1%), and Dori (-1.7%). Prices remained unchanged in Kongoussi. Over the three- and six-month periods, trends were similarly varied, although most markets recorded lower prices than a year earlier. Annual declines ranged from 16.4% in Ouagadougou to 37.5% in Tenkodogo, reflecting generally favourable supply conditions and improved market availability.

In Mali, millet prices generally strengthened during the month. Significant month-on-month increases were recorded in Gao (+9.1%), Bamako (+8.1%), and Tombouctou (+7.7%), while prices remained stable in Kayes, Mopti, Ségou, and Sikasso. Longer-term trends were mixed. Gao registered substantial gains of 15.4% over three months and 20.0% over six months, while Kayes and Mopti also posted increases compared to previous periods. Despite these gains, most markets remained below year-earlier levels, with annual declines ranging from 14.3% to 33.3%, although Kayes was unchanged from the same period last year. These trends suggest localized tightening of supplies in several markets despite generally improved conditions compared to last year.

In Niger, millet prices exhibited mixed month-on-month movements but remained elevated relative to three and six months earlier in most markets. The strongest monthly increase was recorded in Agadez (+10.7%), while prices remained unchanged in Maradi and Zinder. In contrast, prices declined in Niamey (-10.7%), Dosso (-3.9%), and Tillabéri (-1.8%). However, medium-term trends indicate significant market tightening. Prices increased by 24.0% over three months in Agadez, 25.7% in Maradi, and 15.5% in Tillabéri, while six-month gains reached 37.5% in Maradi, 30.0% in Dosso and Zinder, and 25.0% in Tillabéri. On an annual basis, most markets remained below year-earlier levels, with declines ranging from 7.4% to 22.5%. Maradi was the only exception, recording a 4.8% year-on-year increase, indicating stronger upward price pressure than elsewhere in the country.

In Nigeria, the national average millet price increased by 2.1% month-on-month to NGN 474.88/kg. Prices were also substantially higher than three months ago (+15.5%) and six months ago (+19.7%), pointing to sustained domestic demand and tighter market supplies. Unlike most other monitored markets in the region, millet prices in Nigeria were

⁵³ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

2.5% higher than a year earlier, suggesting that market pressures remain stronger than in neighbouring countries.

Table 16: Percentage changes in millet prices in select West African Countries⁵⁴

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Millet	Bobo Dioulasso, Wholesale, XOF/100 kg	29,000.00	-20.55 ↓	-20.55 ↓	-23.68 ↓	-23.68 ↓
Burkina Faso	Millet	Dédougou, Wholesale, XOF/100 kg	22,500.00	7.14 ↑	0.00 ●	7.14 ↑	-25.00 ↓
Burkina Faso	Millet	Dori, Wholesale, XOF/100 kg	28,500.00	-1.72 ↘	0.00 ●	-5.00 ↓	-25.00 ↓
Burkina Faso	Millet	Fada N'gourma, Wholesale, XOF/100 kg	24,000.00	-14.29 ↓	-11.11 ↓	-4.00 ↘	-25.00 ↓
Burkina Faso	Millet	Kongoussi, Wholesale, XOF/100 kg	30,000.00	0.00 ●	-6.25 ↓	-6.25 ↓	-29.41 ↓
Burkina Faso	Millet	Nouna, Wholesale, XOF/100 kg	20,000.00	-11.11 ↓	-11.11 ↓	-11.11 ↓	-33.33 ↓
Burkina Faso	Millet	Ouagadougou, Wholesale, XOF/100 kg	23,000.00	4.55 ▲	2.22 ▲	4.55 ▲	-16.36 ↓
Burkina Faso	Millet	Tenkodogo, Wholesale, XOF/100 kg	25,000.00	8.70 ↑	8.70 ↑	8.70 ↑	-37.50 ↓
Mali	Millet	Bamako, Wholesale, XOF/100 kg	20,000.00	8.11 ↑	-11.11 ↓	0.00 ●	-20.00 ↓
Mali	Millet	Gao, Wholesale, XOF/100 kg	30,000.00	9.09 ↑	15.38 ×	20.00 ×	-14.29 ↓
Mali	Millet	Kayes, Wholesale, XOF/100 kg	28,000.00	0.00 ●	7.69 ↑	7.69 ↑	0.00 ●
Mali	Millet	Mopti, Wholesale, XOF/100 kg	24,000.00	0.00 ●	6.67 ↑	9.09 ↑	-14.29 ↓
Mali	Millet	Ségou, Wholesale, XOF/100 kg	15,000.00	0.00 ●	0.00 ●	-9.09 ↓	-33.33 ↓
Mali	Millet	Sikasso, Wholesale, XOF/100 kg	20,000.00	0.00 ●	-13.04 ↓	-16.67 ↓	-20.00 ↓
Mali	Millet	Tombouctou, Wholesale, XOF/100 kg	28,000.00	7.69 ↑	3.70 ▲	-1.75 ↘	-23.29 ↓
Niger	Millet	Agadez, Wholesale, XOF/100 kg	31,000.00	10.71 ↑	24.00 ×	-3.13 ↘	-22.50 ↓
Niger	Millet	Dosso, Wholesale, XOF/100 kg	25,000.00	-3.85 ↘	13.64 ↑	25.00 ×	-7.41 ↓
Niger	Millet	Maradi, Wholesale, XOF/100 kg	22,000.00	0.00 ●	25.71 ×	37.50 ×	4.76 ▲
Niger	Millet	Niamey, Wholesale, XOF/100 kg	25,000.00	-10.71 ↓	8.70 ↑	19.05 ×	-13.79 ↓
Niger	Millet	Tillabéri, Wholesale, XOF/100 kg	27,500.00	-1.79 ↘	14.58 ↑	25.00 ×	-8.33 ↓
Niger	Millet	Zinder, Wholesale, XOF/100 kg	26,000.00	0.00 ●	13.04 ↑	30.00 ×	-18.75 ↓
Nigeria	Millet	National Average, NGN/KG	474.88	2.07 ▲	15.51 ×	19.66 ×	2.54 ▲

Note: Latest price is for August 2026, * July 2026, and ** June 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 17: Price spreads for sorghum across select West African Countries⁵⁵

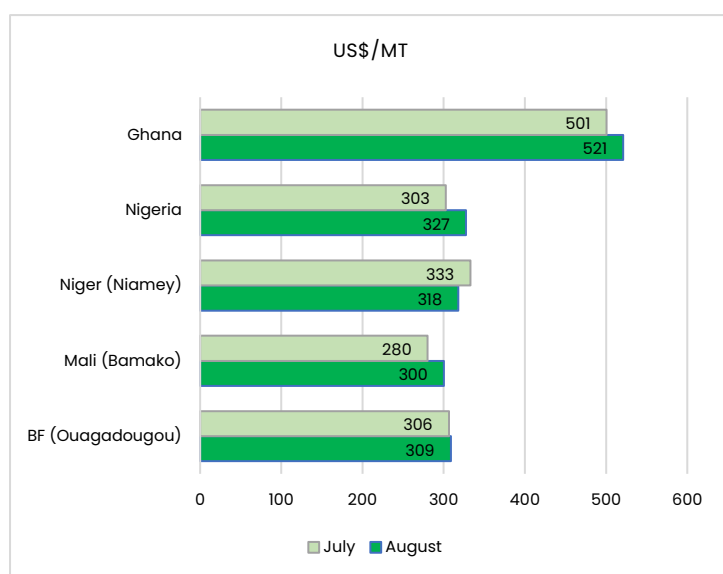


Figure 17 presents sorghum prices (USD per metric tonne) across selected West African markets, comparing July and August prices. Overall, sorghum prices increased in all monitored markets except Niger (Niamey), where prices declined. Nigeria recorded the strongest increase, with sorghum prices rising by 7.9% from USD 303/MT in July to USD 327/MT in August. Similarly, Mali (Bamako) registered a significant increase of 7.1%, with prices rising from USD 280/MT to USD 300/MT, suggesting tightening supplies and strengthening market demand.

A moderate increase was observed in Ghana, where prices rose by 4.0%, from USD 501/MT to USD 521/MT. Despite the increase, Ghana remained the highest-priced sorghum market among the countries monitored, reflecting relatively strong domestic

demand and higher cereal price levels compared to neighbouring markets. In Burkina Faso (Ouagadougou), prices increased marginally by 1.0%, from USD 306/MT to USD 309/MT, indicating generally stable market conditions with

⁵⁴ Author's construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

⁵⁵ These price spreads are calculated based on online rates at <https://www.oanda.com/currency-converter/en>

adequate supplies. In contrast, Niger (Niamey) was the only market to record a decline in sorghum prices, falling by 4.5% from USD 333/MT in July to USD 318/MT in August. The decline may reflect improved market supplies, increased trader stocks, or reduced demand pressure during the reporting period. Overall, Ghana remained the highest-priced market at USD 521/MT, while Mali remained the lowest-priced market at USD 300/MT in August, despite recording one of the largest monthly increases.

Table 17 presents sorghum prices across selected West African markets, revealing generally mixed but relatively stable market conditions, with notable variations across countries and markets. While some markets recorded price increases, particularly in Mali and Nigeria, several markets in Burkina Faso and Niger experienced declines during the month. Overall, annual price trends remained largely below year-earlier levels in most markets, suggesting improved supply conditions compared to the previous season.

In Burkina Faso, sorghum prices showed mixed monthly movements. Significant declines were recorded in Nouna (-17.5%), Fada N’Gourma (-13.5%), Bobo Dioulasso (-2.3%), and Dori (-2.1%), while prices remained unchanged in Kongoussi and Ouagadougou. In contrast, Dédougou (+6.3%) and Tenkodogo (+2.8%) registered moderate increases. Over the medium term, price movements were similarly mixed, although most markets recorded lower prices compared to a year earlier. Annual declines ranged from 6.7% in Bobo Dioulasso to 38.5% in Fada N’Gourma, reflecting improved domestic availability and weaker market pressures relative to the previous year.

In Ghana, sorghum prices remained stable during the month, with the national average unchanged at GHS 5,833/MT. Prices were slightly lower than three months ago (-1.2%) and significantly below six-month levels (-10.3%), indicating improved market supplies compared to earlier in the year. However, prices remained marginally higher than a year earlier (+2.9%), suggesting that domestic market conditions are still somewhat firmer than those prevailing during the same period last year.

In Mali, sorghum prices exhibited mixed trends across markets. Monthly increases were recorded in Tombouctou (+10.0%) and Bamako (+6.3%), while prices remained unchanged in Gao, Kayes, Mopti, Ségou, and Sikasso. Over the three- and six-month periods, several markets recorded gains, particularly Mopti (+14.3% over six months), Bamako (+13.3%), and Tombouctou (+12.2%), suggesting localized supply constraints and stronger demand. Despite these increases, year-on-year prices remained significantly lower across all monitored markets, declining by between 13.0% and 28.6%, indicating that overall market conditions remain more favourable than a year ago.

In Niger, market trends were mixed, although medium-term price increases remained evident in several key markets. Monthly increases were observed in Tillabéri (+9.1%), while prices remained unchanged in Dosso and Zinder. However, notable monthly declines occurred in Maradi (-12.8%), Niamey (-5.3%), and Agadez (-5.2%). Over the three- and six-month periods, strong gains were recorded in several markets, particularly Tillabéri (+29.7% and +33.3%), Maradi (+21.4% and +30.8%), and Niamey (+12.5% and +16.1%), pointing to tighter supplies and increasing market pressures over recent months. Nevertheless, prices in all monitored markets remained substantially below year-earlier levels, with annual declines ranging from 13.0% to 36.0%, reflecting improved conditions compared to the previous season.

In Nigeria, white sorghum prices continued to strengthen, with the national average rising by 6.6% month-on-month to NGN 439.10/kg. Prices were also 10.3% higher than three months ago and 32.6% above six-month levels, indicating sustained demand and tightening market availability. Unlike most neighbouring countries, Nigeria recorded a significant year-on-year increase of 13.8%, suggesting stronger domestic market pressures and relatively tighter supply conditions compared to the same period last year.

Table 17: Percentage changes in sorghum prices in select West African countries ⁵⁶

⁵⁶ Author’s construction based on 1) AGRA MIS for Ghana & Nigeria; and 2) FAO data for Burkina Faso, Mali, Niger, and Togo

Country	Crop	Market	Last Price	1 Month %	3 Months %	6 Months %	1 Year %
Burkina Faso	Sorghum	Bobo Dioulasso, Wholesale, XOF/100 kg	21,000.00	-2.33	-2.33	-6.67	-6.67
Burkina Faso	Sorghum	Dédougou, Wholesale, XOF/100 kg	17,000.00	6.25	-2.86	3.03	-32.00
Burkina Faso	Sorghum	Dori, Wholesale, XOF/100 kg	23,500.00	-2.08	-2.08	-6.00	-28.79
Burkina Faso	Sorghum	Fada N'gourma, Wholesale, XOF/100 kg	16,000.00	-13.51	-13.51	-13.51	-38.46
Burkina Faso	Sorghum	Kongoussi, Wholesale, XOF/100 kg	20,000.00	0.00	0.00	-11.11	-20.00
Burkina Faso	Sorghum	Nouna, Wholesale, XOF/100 kg	16,500.00	-17.50	-17.50	-17.50	-34.00
Burkina Faso	Sorghum	Ouagadougou, Wholesale, XOF/100 kg	17,500.00	0.00	0.00	9.38	-16.67
Burkina Faso	Sorghum	Tenkodogo, Wholesale, XOF/100 kg	18,500.00	2.78	5.71	0.00	-32.73
Ghana	Sorghum	National Average, (GHS/MT)	5,833.33	0.00	-1.21	-10.26	2.94
Mali	Sorghum	Bamako, Wholesale, XOF/100 kg	17,000.00	6.25	6.25	13.33	-15.00
Mali	Sorghum	Gao, Wholesale, XOF/100 kg	25,000.00	0.00	-3.85	8.70	-28.57
Mali	Sorghum	Kayes, Wholesale, XOF/100 kg	20,000.00	0.00	11.11	5.26	-20.00
Mali	Sorghum	Mopti, Wholesale, XOF/100 kg	20,000.00	0.00	0.00	14.29	-13.04
Mali	Sorghum	Ségou, Wholesale, XOF/100 kg	15,000.00	0.00	0.00	0.00	-25.00
Mali	Sorghum	Sikasso, Wholesale, XOF/100 kg	17,500.00	0.00	-2.78	-12.50	-12.50
Mali	Sorghum	Tombouctou, Wholesale, XOF/100 kg	27,500.00	10.00	1.85	12.24	-22.54
Niger	Sorghum	Agadez, Wholesale, XOF/100 kg	25,600.00	-5.19	2.40	-20.00	-36.00
Niger	Sorghum	Dosso, Wholesale, XOF/100 kg	19,000.00	0.00	5.56	-5.00	-24.00
Niger	Sorghum	Maradi, Wholesale, XOF/100 kg	17,000.00	-12.82	21.43	30.77	-15.00
Niger	Sorghum	Niamey, Wholesale, XOF/100 kg	18,000.00	-5.26	12.50	16.13	-21.74
Niger	Sorghum	Tillabéri, Wholesale, XOF/100 kg	24,000.00	9.09	29.73	33.33	-17.24
Niger	Sorghum	Zinder, Wholesale, XOF/100 kg	20,000.00	0.00	0.00	25.00	-13.04
Nigeria	Sorghum (white)	National Average, NGN/KG	439.10	6.58	10.26	32.61	13.83

Note: Latest price is for August 2026, * July 2026, and ** June 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 Conditions⁵⁷

West Africa's agro-climatic conditions remain generally favourable for ongoing agricultural activities, despite recent rainfall deficits across parts of the Sahelian belt. Main-season cereal harvesting is progressing across much of the southern bimodal rainfall zone, while planting and crop development for the second cereal season are underway in several areas benefiting from continued rainfall. Across the Sahelian zone, harvesting of main-season cereals has commenced in some locations, while planting and crop development continue elsewhere where seasonal rains remain supportive. Overall, current conditions are sustaining crop growth and harvest operations across much of the region, although localized rainfall shortfalls may warrant continued monitoring.

⁵⁷ Crop Monitor No. 116 – June 2026: https://www.cropmonitor.org/s/EarlyWarning_CropMonitor_202606-x95c.pdf

Food Trade Updates

Continental

The African Organization for Standardisation (ARSO) has launched the Africa Quality Mark in Mombasa, a continent-wide certification framework designed to support the African Continental Free Trade Area (AfCFTA) by eliminating duplicate product testing and quality inspections across borders.⁵⁸ The initiative will allow goods certified in one African country to be accepted across participating markets, reducing trade costs, accelerating border clearance, improving market access and competitiveness, and helping address longstanding non-tariff barriers that have constrained intra-African trade, while also requiring investments in standard harmonisation, laboratory accreditation, enforcement capacity, and digital systems to ensure credibility and adoption across the continent.

East and Southern Africa Region Food Trade Updates

Figure 18 provides an overview of the trade-related interventions and investments in August 2026 across various countries in East and Southern Africa over the past month and that are affecting the food trade in the region.

Figure 18: East and Southern Africa cross-border trade updates, August 2026



Zambia

On 6 August 2026, the African Development Bank Group approved a \$255 million loan and a \$10 million grant to support Zambia's participation in the Lobito Economic Corridor, a regional initiative linking Zambia, Angola, and the Democratic Republic of the Congo to boost trade, industrialisation, and economic growth. The project will fund the construction of 550 km of railway infrastructure, upgrade key roads, improve trade facilitation and institutional capacity, reduce logistics costs, attract investment, and create thousands of jobs while promoting skills development, youth employment, and climate-resilient infrastructure.

Kenya

Kenya and DRC are deepening regional digital integration through the launch of the 2,000 km Goma-to-Mombasa (G2M) fibre corridor and the integration of Kenya's Pesalink instant-payment platform with the Pan-African Payment and Settlement System (PAPSS), enabling faster connectivity and near real-time cross-border payments in local currencies. Together, these initiatives aim to boost trade, reduce transaction and connectivity costs, strengthen financial and digital inclusion, and support broader economic integration across East and Central Africa.

Tanzania

For the first time in the country's history, a digital white maize auction was successfully conducted, marking a significant milestone in the modernization of agricultural commodity trading in Tanzania. The auction, held in the Rukwa Region by the Cereals and Other Produce Regulatory Authority (COPRA) and Tanzania Cooperative Development Commission (TCDC), in collaboration with the Tanzania Mercantile Exchange (TMX), resulted in the trading of 335,238 kg of maize during its inaugural phase. This achievement demonstrates the growing potential of digital trading platforms to enhance market transparency, price discovery, efficiency, and market access for farmers and other value chain actors.

⁵⁸ <https://streamlinefeed.co.ke/news/arso-unveils-africa-quality-mark-afcfta-trade-barriers>



Value	Unrealized P/L	%Unre
1000.00		
6,700.00	-14,930.33	-0.22
1200.00	+5,309.28	+0.44
500.00	+13,022.92	+2.60

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

For more information,
please visit **www.rfbsa.com**.

<https://rfbsa.com/>

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