



WFP/Michael Tewelde



World Food
Programme

SAVING
LIVES
CHANGING
LIVES

WFP Eastern and Southern Africa Office Market and Trade Update 2025 Q1 - Eastern Africa

Joint VAM and Procurement
May 2025

Highlights

- International cereal prices fell in March 2025, supported by good crop conditions in some major producing countries and ample supply from seasonal harvests vis-à-vis reduced demand. The benchmark United States of America (U.S. No. 2, Hard Red Winter) wheat and the United States of America (U.S. No.2, Yellow) maize declined by 3.3 and 6.2 percent respectively on a month-on-month (m-o-m) basis. Similarly, the FAO All Rice price index also posted a decline of about 1.7 percent in March.
- While global crude oil prices declined for two consecutive months in February and March 2025, local fuel prices remained significantly elevated particularly in **Burundi**, **South Sudan** and **Sudan**. Brent crude oil price stood at 71 USD/bbl in March – down 3.4 percent on m-o-m basis and 16.1 percent lower than March 2024 level. In South Sudan and Sudan, average pump prices were at approximately 2.8 USD/l, 309 and 138 percent respectively higher than year earlier levels. Although the official fuel price at the pump has remained unchanged in Burundi since March 2024 (4,000 BIF, or approximately USD 1.40), fuel is scarce. This ongoing shortage has led to the emergence of a parallel market, where the price per litre exceeds the official rate by more than four times.
- Macroeconomic challenges persisted through to the first quarter of 2025, with some local currencies recording severe currency depreciation against the U.S. dollar. By March 2025, **Ethiopia** and **South Sudan** recorded the highest currency depreciation in official rates (56.2 percent and 24.7 percent respectively) primarily driven by low foreign reserves versus high demand. Conversely, the **Kenyan** and **Ugandan** shilling strengthened by 5.4 percent and 6.0 percents respectively, supported by foreign currency inflows and monetary policies.
- Regional inflation averaged 34.0 percent in March 2025 (excluding **Somalia** and **South Sudan**). **Sudan** posted an annual inflation of 173.7 percent in March. While data was not available for **South Sudan**, inflation is estimated to be at triple digits given the high prices for both goods and services.
- The per capita cost of food basket either eased or remained stable in most countries across the region. In **Rwanda** and **Burundi**, m-o-m decline of 4 percent was recorded in March, supported by significant decline in cereal prices. In **Sudan** and **South Sudan**, the cost of food basket remained relatively stable on m-o-m basis while remaining significantly higher than same time previous year (105.8 and 229.5 percent respectively). In **Djibouti**, **Kenya** and **Somalia**, the per capita cost of food basket was lower than March 2024 levels by 7-12 percent.
- As of March 2025, cereal prices in WFP-monitored markets showed mixed trends compared to the 5-year average, with prices mostly stable or lower in **Djibouti** and **Uganda**. However, **Sudan** and **South Sudan** saw exceptionally high prices—over 500 percent above the 5-year average, driven by prolonged conflict and macroeconomic challenges.



1. International Commodity Price Outlook¹

The FAO Food Price Index (FFPI) remained stable on m-o-m basis averaging at 127.1 points in March 2025. Increases in meat and vegetable oil price indices were offset by considerable decline in cereal and sugar indices whereas dairy products indices remained unchanged. Noteworthy, the FFPI Index was 6.9 percent higher than level recorded same time in 2024¹.

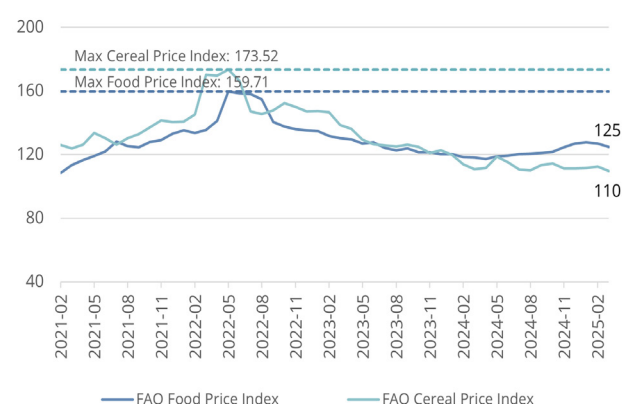
International cereal prices generally declined in March 2025 on a m-o-m basis with the FAO Cereal Price Index averaging at 109.7 points, 2.7 percent lower than February level. Global wheat prices eased as earlier concerns over crop conditions in some major Northern Hemisphere exporters waned off. According to FAO, tight supplies in Russia and removal of wheat import quota in Turkey moderated the decline in March. As of March 2025, the benchmark United States of America (US No. 2, Hard Red Winter) was at 256 USD/tonne, having declined by 3.3 percent on a m-o-m basis while remaining about 7 percent lower than price level recorded in March 2024.

Global maize prices also declined in March 2025 after consecutive months of sustained increase supported by good crop conditions in Brazil, start of harvest season in Argentina, a weaker demand from China and concerns over trade policies. As of March 2025, the United States of America (U.S. No.2, Yellow) maize price quotations were at 208 USD/tonne, having recorded a 6.2 percent m-o-m decline while remaining 8.9 percent higher than a year ago.

The FAO All Rice index also declined in March

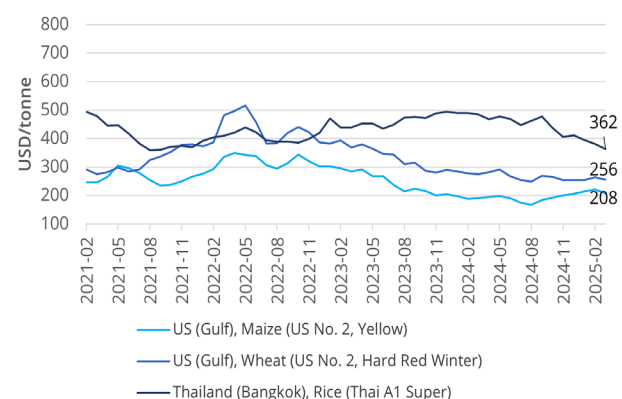
2025 averaging 104.1 points, 1.7 percent lower than February level. Weak demand coupled with ample supplies as new harvests from the second season production in India and Thailand reached markets supported declines for the Indica rice. As of March 2025, quotations for the benchmark Thai A1 Super were at 362 USD/ton, reflecting a 4.7 percent m-o-m decline and a 25.1 percent decline compared to level recorded same time last year.

FIG 1. FAO FOOD AND CEREAL PRICE INDEXES



SOURCE: FAO

FIG 2. INTERNATIONAL GRAIN PRICES



SOURCE: FAO FPMA

TABLE 1. AVERAGE INTERNATIONAL CEREAL PRICE CHANGE

Commodity	Price (USD/tonne)	Price change		
	Mar-25	m-o-m	y-o-y	5-year average
US (Gulf), Maize (US No. 2, Yellow)	208	-6.2%	8.9%	-14.8%
US (Gulf), Wheat (US No. 2, Hard Red Winter)	256	-3.3%	-6.9%	-19.0%
Thailand (Bangkok), Rice (Thai A1 Super)*	362	-4.7%	-25.1%	-19.2%

SOURCE: FAO FPMA

2. Regional Crossborder Trade Dynamics³

MAIZE

As of late February, **Tanzania** posted the lowest maize price in the region at USD 289/MT, while **Kenya** posted the highest for both January and February at USD 428/MT and USD 421/MT respectively. Low prices in **Tanzania** are linked to ample availabilities following record level maize production in 2024/2025 seasons⁴. Prices in **Kenya**, **Uganda**, and **Ethiopia** remained stable, fluctuating within ± 1 percent m-o-m. **Rwanda** recorded significant decrease of 12 percent on m-o-m basis due to increased supply from the main Season A harvests.

By quarter-end, maize in **Tanzania** traded at USD 321–340/MT, though with slightly high moisture content (15–18 percent), exceeding the Eastern Africa Standards (EAS) limit of 13.5 percent. In Southern Africa, recent rainfall improved 2025 cereal production prospects, easing some pressure. However, tight supplies and weak currencies are keeping maize prices high, with record levels in **Malawi** and **Zambia**.

FIG 3. NATIONAL AVERAGE MAIZE PRICES ACROSS EAST AFRICA



SOURCE: [AGRA Food Security Monitor February 2025](#)

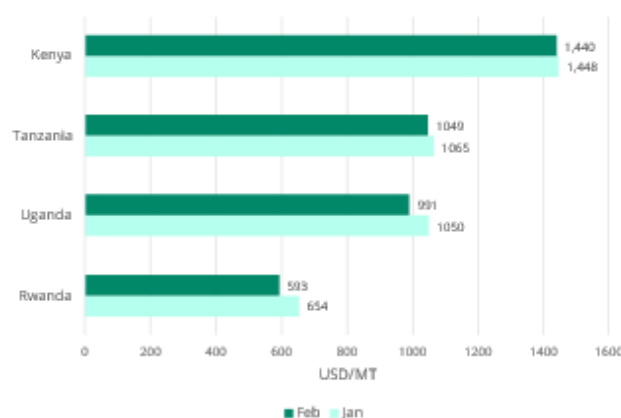
PULSES - BEANS MIXED AND SINGLE VARIETY

Following favourable green harvests and effective stock maintenance, prices remained stable or slightly eased for the first two months with **Rwanda** recording the lowest retail price at approximately USD 593/MT as at end February. However, at the end of the quarter, marking a close to the harvest

seasons, higher prices were noted with **Rwanda** reporting USD 715/MT and **Uganda** at a high of USD 1,108/MT for mixed beans. **Kenya** recorded the highest dry beans price at USD 1,440/MT in February, almost at same level recorded in January following below average production in recent seasons.

The single variety reported a higher price in **Uganda** at approximately USD 1,238/MT recording moisture contents of 16-18 percent slightly higher than WFP and EAS acceptable limits of 14 percent

FIG 4. NATIONAL AVERAGE BEANS PRICES ACROSS EAST AFRICA SELECTED MARKETS



SOURCE: [AGRA Food Security Monitor February 2025](#)

SORGHUM

The ongoing conflict in **Sudan** continues to disrupt supply of sorghum particularly to **South Sudan** increasing the reliance of sorghum from **Tanzania** as well as from international markets to supplement the local sourcing to satisfy the **South Sudan** demand. The **Ethiopia** sorghum production has this year experienced a surge in the harvests with good volume offerings expected to remain available until June. These sustained volumes make **Ethiopia** a viable market to satisfy the Eastern African demand, logistics permitting. As at the end of the quarter, **Ethiopia** red and white sorghum prices were recorded at USD 374/MT whereas **Tanzania** closed the season at USD 436 /MT for white sorghum. The prices in **Sudan** were steady, with offerings in Gedaref market at USD 419/MT⁵.

3. Exchange Rates and Costs of Living³

Local currencies throughout the Eastern Africa region continued to weaken against the U.S. dollar through to the first quarter of 2025, except for **Kenya**, **Djibouti**, **Somalia** and **Uganda**, where currencies either strengthened or remained relatively stable.

TABLE 2: TRENDS IN EXCHANGE RATES

Trends in exchange rates					
Country	Currency	Type	Mar-25	m-o-m	y-o-y
Burundi	BIF/USD	Official	2,953	-0.3%	-2.1%
		Parallel	7,600	0.0%	-27.6%
Djibouti	DJF/USD	Official	178	0.0%	-0.2%
Ethiopia	ETB/USD	Official	129	-1.9%	-56.2%
		Parallel	154	-5.8%	-24.7%
Kenya	KES/USD	Official	129	0.0%	5.4%
Rwanda	RWF/USD	Official	1,418	-0.9%	-10.2%
Somalia	SOS/USD	Official	30,837	0.1%	-0.7%
	SLS/USD	Official	10,000	0.0%	-11.5%
South Sudan	SSP/USD	Reference	4,453	4.5%	-64.5%
		Parallel	5,562	-4.3%	-68.6%
Sudan	SDG/USD	Commercial Banks	1,997	0.0%	-43.5%
		Parallel	2,528	2.3%	-50.2%
Uganda	UGX/USD	Official	3,669	0.3%	6.0%

SOURCE: National Central Banks and WFP COs

Prolonged conflict in **Sudan** continues to severely affect the economies of both **Sudan** and **South Sudan**. As of March 2025, **South Sudan** recorded the highest currency depreciation in the region – 64.5 percent in the official reference market and 68.6 percent in the parallel market. **Sudan** recorded significant depreciation of the Sudanese Pound (SDG), losing approximately 43.5 percent in the commercial bank rate and 50.2 percent in the parallel market.

The **Ethiopian** Birr (ETB) also depreciated significantly between March 2024 and March 2025 – by 56.2 percent in the official market and 24.7 percent in the parallel market. The depreciation of the Birr in the official exchange market is due to the shift from managed floating to a market-based system since July 29, 2024. Notably, the gap between the official and parallel rates reduced compared to before the shift to market-based exchange system.

Kenya's and **Uganda's** local currencies strengthened against the U.S. dollar by 5.4 and 6 percent on a year-on-year (y-o-y) basis in March

2025. The Central Bank of **Kenya's** decision to lower the Central Bank Rate in August 2024, aimed at reducing inflation, has been the primary driver of this recovery⁶ over the past six months. Increased foreign inflows late last year and tight monetary policies helped stabilize Uganda's currency⁷.

Annual inflation remained high in selected countries throughout the first quarter of 2025. As of March 2025, the regional average inflation rate was at 34.0 percent (excluding **Somalia** and **South Sudan**). In **Sudan**, the annual inflation rate was at 173.7 percent in March. Whereas data was not available for **South Sudan**, inflation rates is estimated to be at triple digits given the high prices of goods and services. **Burundi** and **Ethiopia** continued to record double digit inflation rates of 40.9 and 13.6 percent, respectively in March.

Food inflation exhibited similar patterns across the region over the reference period. **South Sudan** is estimated to have the highest food inflation in the region given the surge in food prices across the country. **Burundi** and **Ethiopia** maintained double digit food inflation throughout the first quarter. High food inflation in **Burundi** is primarily linked to high production and transportation costs and depreciation of local currency against the U.S. dollar.

TABLE 3: TRENDS IN ANNUAL AND FOOD INFLATION RATES

Country	Annual Inflation		Food Inflation	
	Mar-25	Mar 25/24	Mar-25	Mar 25/24
Burundi	40.9%		40.0%	
Djibouti	-1.8%		-2.9%	
Ethiopia	13.6%		11.9%	
Kenya	3.6%		6.6%	
Rwanda	4.9%		3.5%	
Somalia				
South Sudan				
Sudan	173.7%		117.3%	
Uganda	3.4%		2.0%	
RBN	34.0%		25.5%	

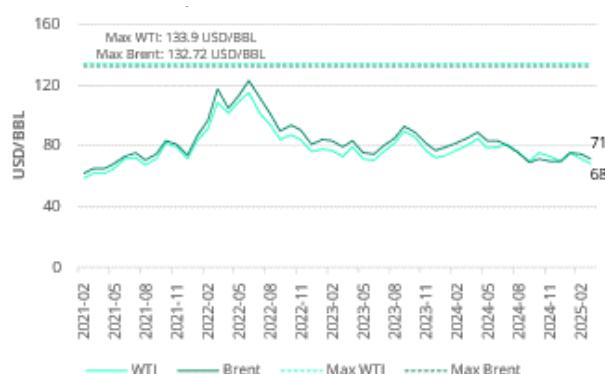
SOURCE: National Institutes of Statistics

4. Fuel Prices

Crude oil prices fell for two consecutive months following a decline in oil futures markets and easing of supply risk premiums. Western Texas Intermediate (WTI) crude oil's average spot price as of March 2025 was 68 USD/bbl, reflecting a m-o-m decline of 3.22 percent. Brent crude oil price stood at 71 USD/bbl in March (down 3.4 percent compared to February 2025 and 16.1 percent lower than March 2024 price level)⁸.

Except for **Sudan** and **South Sudan**, the average pump prices remained stable on a m-o-m basis over the first quarter of 2025. As of March 2025, the regional average petrol price was at 1.4 USD/L, approximately 4 and 37 percent higher compared to February 2025 and March 2024 respectively

FIGURE 5: TRENDS IN BRENT AND WTI



SOURCE: OPEC

The average pump price remains atypically high in **South Sudan** with significant regional price variation. This is mainly linked to challenging macroeconomic environment, supply routes disruptions due to localized conflicts and increased demand. By March 2025, the national average price was at 2.8 USD/L, reflecting a m-o-m increase of 30 percent and over 300 percent up year earlier level.

In **Sudan**, the average commercial fuel prices recorded an increase for two consecutive months – February and March while in parallel markets, price slightly eased in February as demand in the agricultural sector declined. However, March

2025 saw a m-o-m increase of 2 and 18 percent in commercial and parallel markets respectively mainly due to supply chain instability⁹.

TABLE 4: PETROL PRICES PER LITRE (LOCAL CURRENCIES AND USD) AND VARIATIONS

Country	Fuel price		Variations	
	USD/L	LCU/L	m-o-m Feb-25	y-o-y Mar-24
Burundi	2.2	16,548.9	▼ -2.3%	▲ 141.3%
Djibouti	1.2	205.0	▼ 0.0%	▼ 0.0%
Ethiopia	0.7	101.5	▼ 0.0%	▲ 27.2%
Kenya	1.4	177.3	▼ 0.0%	▼ -11.3%
Rwanda	1.2	1,633.0	▼ 0.0%	▼ -0.2%
Somalia (SoS)	1.1	32,760.2	▼ -1.7%	▼ -8.3%
South Sudan	2.8	15,340.0	▲ 30.0%	▲ 309.1%
Sudan	2.6	6,492.0	▲ 0.0%	▲ 138.4%
Uganda	1.5	5,417.0	▼ 8.7%	▼ -0.3%

SOURCE: National Bureaux of Statistics and WFP COs

Fuel prices in **Burundi** remained atypically high during the first quarter, despite significant decline recorded in March. This is primarily driven by the high exchange rates that inflates the cost of imports and the widespread scarcity witnessed across the country leading to emergence of parallel markets where fuel prices are higher. By March 2025, price levels were at least 140 percent higher than they were a year earlier, at 2.2 USD/L.

Significant y-o-y ease in prices was recorded in **Kenya** (11.3 percent) and **Somalia** (8.3 percent) while remaining stable in **Djibouti**, **Rwanda** and **Uganda**. This was mainly supported by local currencies stability against the U.S. dollar and favourable global crude oil price.



5. Economic Access to food

The per capita cost of food basket either eased or remained stable in most countries across the region. In **Rwanda** and **Burundi**, m-o-m decline of 6 percent was recorded in March, supported by significant decline in cereal prices. In **Sudan** and **South Sudan**, the cost of food basket remained relatively stable on m-o-m basis while remaining significantly higher than same time previous year (105.8 and 229.5 percent respectively). In **Djibouti**, **Kenya** and **Somalia**, the per capita cost of food basket was lower than March 2024 levels by 7-12 percent.

The recent main season harvests in Sudan greatly improved availabilities and market supply supporting the downward trend observed over the first quarter. For instance, sorghum recorded m-o-m decline of about 6.5 percent in March, however still more than double year earlier level. Similarly, vegetable oil prices also declined by 3.1 percent compared to February price levels while at nearly double previous year level. On the contrary, milk prices increased by 3.3 percent on a m-o-m basis.

Severe currency depreciation, high cost of transportation, high import duties and supply chain constraints linked to localized conflict

continue to impact on food prices across **South Sudan**. As of March 2025, sorghum prices were more than triple a year ago while vegetable oil and dry beans prices were more than 280 percent up the previous year levels.

Mixed price trends were observed elsewhere in the region. **Rwanda** and **Burundi** recorded significant m-o-m decline in March on cereal prices of 11.2 and 17.4 percent respectively supported by ample availabilities from Season A harvests. **Uganda** on the other hand saw significant increase (8.6 percent) in maize prices in March, up 29 percent compared to levels recorded a year ago.

TABLE 5: TRENDS IN THE MONTHLY PER CAPITA COST OF THE FOOD BASKET

Country	Mar-25		Variations	
	LCU	USD	m-o-m	y-o-y
Burundi	45,820	15.5	-6.7%	24.1%
Djibouti	2,093	11.8	1.4%	-8.5%
Ethiopia	1,700	11.0	1.6%	10.0%
Kenya	2,083	16.1	0.6%	-6.9%
Rwanda	11,369	8.0	-4.6%	43.6%
Somalia	565,659	18.3	0.2%	-11.6%
South Sudan	88,366	19.8	2.1%	229.5%
Sudan	56,669	22.5	0.0%	105.8%
Uganda	62,594	17.1	1.5%	9.5%
RBN		15.6	-0.4%	43.9%

TABLE 6. TRENDS IN SELECTED COMPONENTS OF LOCAL FOOD BASKET

Country	Cereals		Vegetable oil		Beans		Milk	
	Mar/Feb	Mar	Mar/Feb	Mar	Mar/Feb	Mar	Mar/Feb	Mar
	2025	2025/2024	2025	2025/2024	2025	2025/2024	2025	2025/2024
Burundi	-17.4%	8.6%	5.7%	72.4%	5.0%	18.3%		
Djibouti	3.6%	-5.7%	1.5%	-17.5%	0.0%	20.2%		
Ethiopia	1.0%	7.2%	10.6%	62.1%	-0.2%	7.0%		
Kenya	0.4%	-9.3%	-0.4%	6.7%	2.0%	-17.6%		
Rwanda	-11.2%	40.4%	-6.6%	20.9%	3.3%	58.1%		
Somalia	-1.0%	-12.7%	5.3%	12.3%			4.0%	-18.5%
South Sudan	0.0%	196.6%	4.7%	317.2%	6.8%	284.7%		
Sudan	-6.5%	116.5%	-3.1%	71.0%			3.3%	124.2%
Uganda	8.6%	29.0%	1.1%	8.3%	-4.6%	-2.2%	-37.2%	-32.7%
RBN	-2.5%	41.2%	2.1%	61.5%	1.7%	52.6%		

SOURCE: WFP COS

Vegetable oil prices remained stable on m-o-m basis in most countries. Compared to same time last year, vegetable oil prices were up 6-21 percent

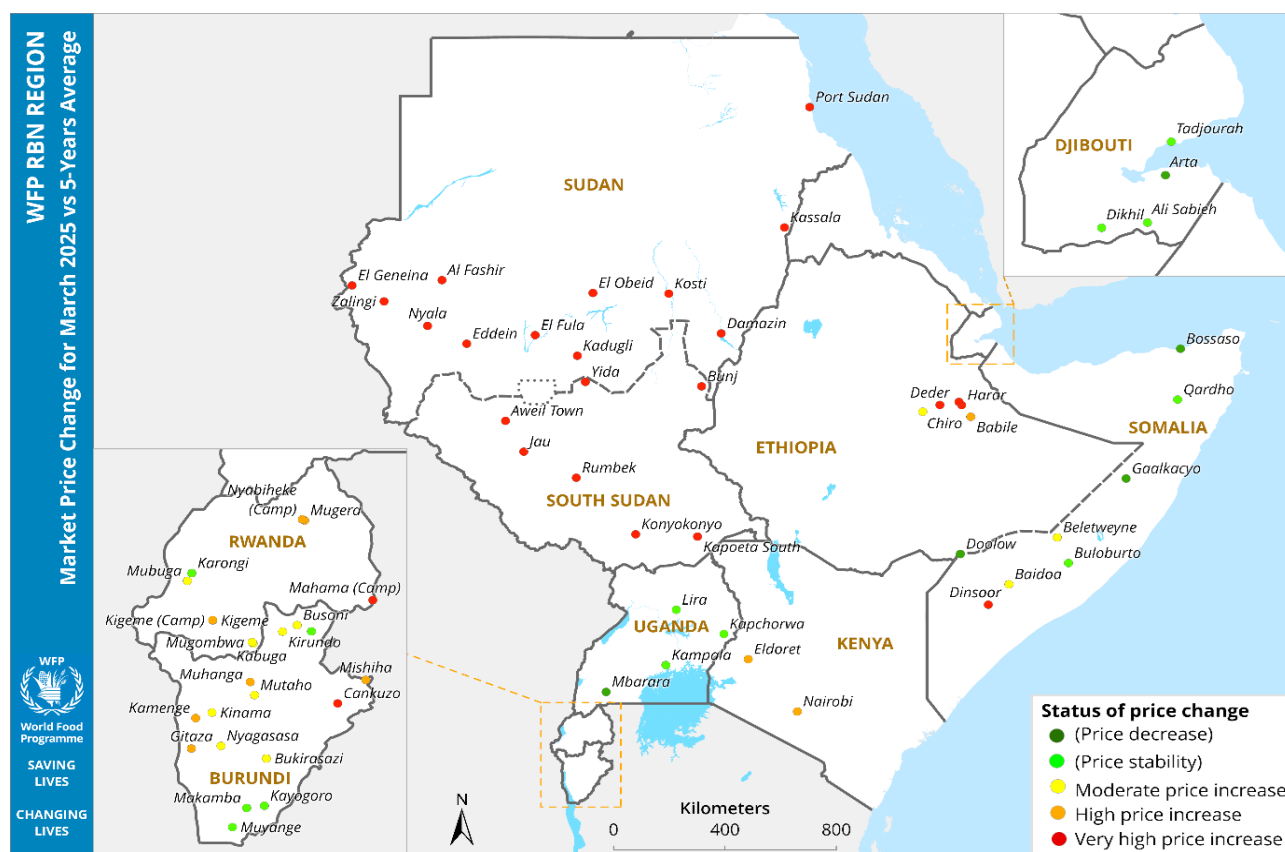
in Kenya, Rwanda, Somalia and Uganda while Djibouti, significant decline of 17.5 was recorded.

6. Mixed Price Trends across the Eastern Africa Region

Except for Sudan and South Sudan, cereal prices in WFP monitored markets across the region recorded mixed trends compared to the corresponding 5-year average levels. As of March 2025, staple cereal prices in most markets in Djibouti and Uganda either decreased or remained stable compared to the 5-year average.

In Sudan and South Sudan, food prices remain exceptionally high compared to the 5-year average. This is primarily driven by macroeconomic fallout exacerbated by the ongoing conflict in Sudan, which has lasted more than two years amongst other factors. In most markets prices remain more than 500 percent up the long-term average.

MAP 1: CEREAL PRICE CHANGE: DECEMBER 2024 VS. 5-YEAR AVERAGE



SOURCE: WFP COs



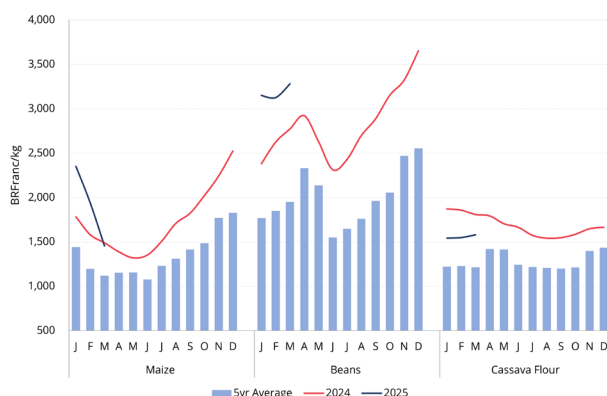
7. Country Updates

The following section Country Updates provides a more detailed description of cereal price trends across each of the countries falling under the WFP Eastern Africa Region. For each country, the 2025 monthly price trends of main staple foods consumed are compared against the five-year average.

BURUNDI

Cereal prices trended seasonably during the first quarter of the year while recording considerable decline compared to the previous quarter. After several months of sustained m-o-m increase, maize price declined significantly over 2025Q1 and by March 2025, the national average price was at 1,454 BIF per kg, 2 percent and 25 percent below year earlier and February 2025 levels respectively. Conversely, cassava flour price increased seasonably over the reference period while remaining 13-18 percent lower than previous year levels. Similar price patterns were observed for dry beans, retailing at 3,280 BRF per kg, 18 and 68 percent higher than previous year and the 5-year average levels as of March 2025. The ease in maize prices is mainly attributed to improved market supply from season A harvests, estimated to be average to above average. Additionally, declining fuel prices over the reference period could have also helped ease food prices in the country during the first quarter.

FIG 6. BURUNDI - NATIONAL AVERAGE OF KEY STAPLES



SOURCE: WFP CO

DJIBOUTI

Djibouti heavily relies on food imports to meet local consumption needs making the country highly vulnerable to international trade dynamics however, food prices have remained relatively stable in recent times, supported by stable macro-economic conditions and price controls. The country has the most stable food prices in the Eastern Africa region, though at high levels. The national average price of key food items remained stable during the first quarter of 2024, reflecting favourable international prices and stable macroeconomic conditions in the country. Prices of vegetable oil and wheat flour retailed on average 5-18 percent below levels recorded in the past year and the corresponding long-term averages. Imported rice and pasta prices remained stable throughout the reference period at slightly higher levels than previous year.

FIG 7. DJIBOUTI - NATIONAL AVERAGE PRICE OF KEY STAPLES



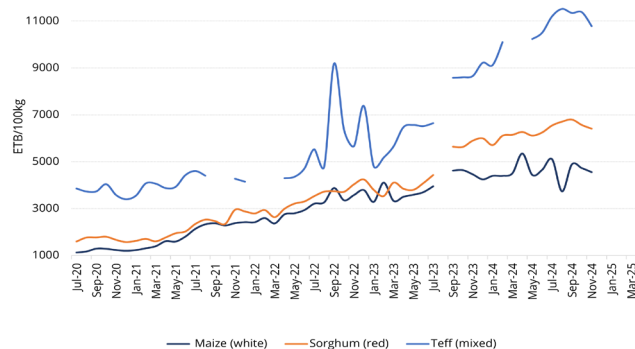
SOURCE: WFP CO

ETHIOPIA

Prices of key staples exhibited mixed trends during the first quarter of 2025, remaining relatively stable in most markets while either slightly increasing or declining in a few others. As of March 2025, the national average prices of sorghum and maize were 35-50 percent higher than corresponding 2024 levels, with significant variation across

markets. The average price of teff (which is widely consumed in urban areas) was at almost same levels as last year and about 65 percent higher than the 5-year average. Whereas Meher harvests concluded in December in major surplus producing regions greatly improved market supply, the gains were counterbalanced by effects of deteriorating macroeconomic conditions, localized conflict and high production and transportation costs¹¹.

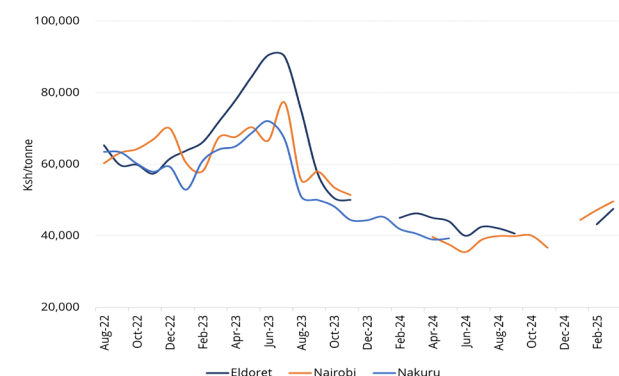
FIG 8. ETHIOPIA - CEREAL PRICE TRENDS IN



ADDIS ABABA
SOURCE: WFP CO

KENYA

FIG 9. KENYA - WHOLESALE MAIZE PRICES IN



SELECTED MARKETS

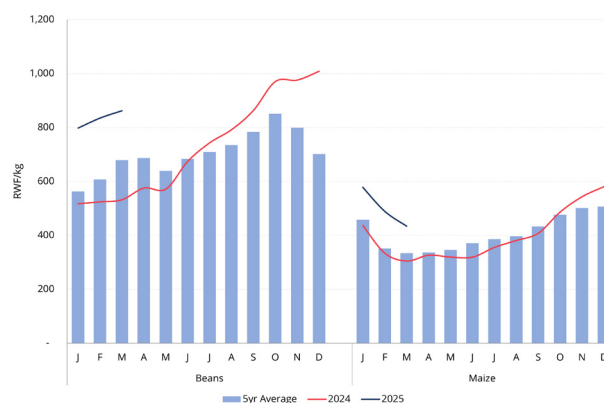
SOURCE: WFP CO

During the first quarter of 2025, dry maize prices recoded increasing trends in most markets including in high potential maize producing regions (Rift Valley and Western). In the reference market of Eldoret, maize wholesale price surged to 47,500 Ksh/tonne in March 2025, posting a m-o-m increase of 10 percent and slightly higher than year-earlier level. Similarly, in the capital city

of Nairobi, price increased steadily throughout the reference period reaching 49,600 Ksh/tonne by March. Poor rainfall distribution during the October-December 2024 rainy season affected crop development in bimodal areas including in Eastern and Coastal regions leading to below average production. Reduced households' stocks and market supply thus exerted upward pressure on prices over the reference period. Generally, production fell in 2024 compared to preceding year 2023, local supply shortfall therefore underpinned the increasing trends recorded in most markets in the first quarter of 2025.d.

RWANDA

FIG 10. RWANDA - AVERAGE PRICE OF KEY STAPLES



SOURCE: WFP CO

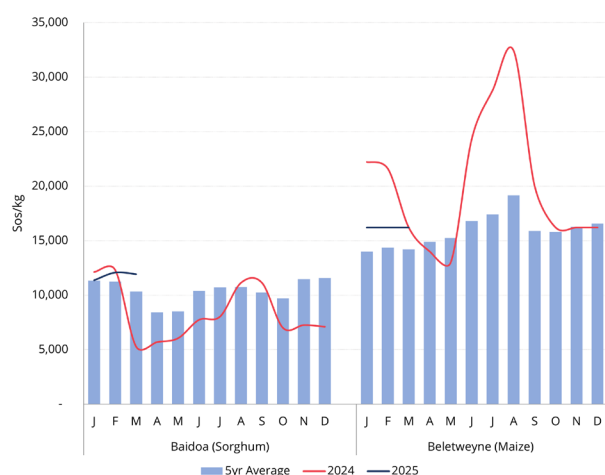
Prices of staples trended seasonably above year earlier and long-term average levels in the first quarter of 2025. The national average price of maize exhibited a downward trend over the reference period retailing 33-47 percent higher than corresponding 2024 levels. As of March 2025, the national average price of maize was at 438 RWF, 45 percent higher than year earlier level. On the other hand, dry beans price increased seasonably over the reference period while remaining considerably lower than the past quarter. By March 2025, the national average price of beans was at 862 RWF per kg, 69 and 27 percent higher than previous year and 5-year average levels respectively. While the combined effect of various factors such as high cost of production and regional trade dynamics kept prices up, recent seasonal price decline is primarily attributed to improved market supply

from recent seasonal harvests..

SOMALIA

Cereal prices in Somalia exhibited mixed trends during the first quarter of the year, remaining stable in most markets at high levels, while slightly increasing or declining in others. In Baidoa, sorghum prices increased considerably in January and February. The latest price recorded in March 2025 was at 11,930 SoS per kg, more than double year earlier level and about 15 percent up the long-term average. There was significant variation in sorghum price across markets, ranging from as low as 9,080 SoS/kg in Jowhar market to 58,133 SoS/kg in Taalex Market. Similarly, maize prices remained stable across most markets over the reporting period though with high variation across markets. In Beledweyne market for instance, retail price remained stable at 16,200 SoS/kg throughout the first quarter, ranging 13-16 percent higher than levels recorded in 2024 same time. Low cereal supply following below average harvests in recent seasons exerted upward pressure on prices over the reporting period.

FIG 11. SOMALIA – PRICE OF KEY STAPLES IN SELECTED MARKETS



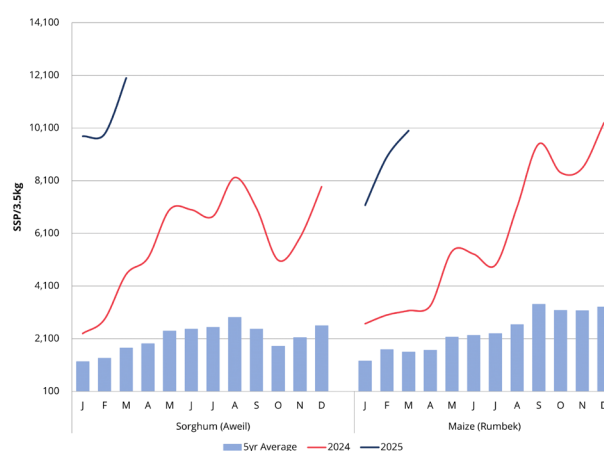
SOURCE: WFP CO

SOUTH SUDAN

Challenging macroeconomic conditions marked by high exchange rates and hyperinflation continued to undermine trade and households' purchasing power through to the first quarter of 2025. Food

prices continued to soar throughout the first quarter across most parts of the country, reaching more than three times the levels recorded in the same period last year and above the long-term average. The national average price of maize and sorghum trended upward throughout the reference period hitting new record levels, at over 200 percent higher than quarter one of 2024, with significant variation across markets. In Aweil market for instance, sorghum retailed on average at 12,000 SSP/3.5kg in March 2025, more than 150 percent up levels recorded same time last year, a common pattern across most markets in the country. Persistent macro-economic challenges, high transportation costs, high transactional costs, localized conflict, scarcity and other constraints continue to undermine trade, driving food prices even higher across the country consequently constraining food access for thousands of households.

FIG 12. SOUTH SUDAN – PRICE OF KEY STAPLES IN SELECTED MARKETS



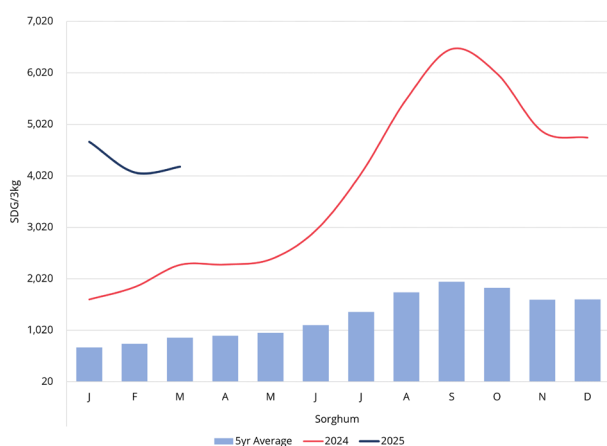
SOURCE: WFP CO

SUDAN

The ongoing conflict continues to negatively impact of the economy and food supply chain, directly undermining food access to majority of the population. While staple food prices remain atypically high, notable decline was recorded in most markets at the beginning of the year. As of March 2025, the national average price of sorghum was 4,200 SDG/3kgs, about 80 percent higher than corresponding 2024 level. There was significant regional price variation driven primarily

by supply dynamics and high transportation costs with highest commodity price recorded in Kordofan states. Declining trends were supported by improved supply from recent seasonal harvests estimated to be average to above average in some regions. Wheat flour price also remained at elevated levels double year earlier price levels throughout 2025Q1. High currency exchange rates and production costs are key drivers of wheat flour prices in the country.

FIG 13. SUDAN – NATIONAL AVERAGE PRICE OF SORGHUM



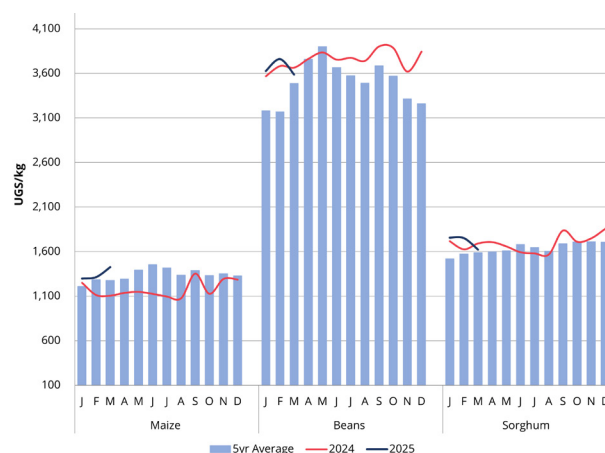
SOURCE: WFP CO

UGANDA

During the first quarter of 2025, staple cereal prices in Uganda exhibited atypical seasonal patterns, with maize prices gradually increasing through March. The national average price of maize increased from 1,298 UGS per kg in January to 1,427 UGS per kg in March 2025, ranging

4-29 percent up a year ago. There were notable disparities across markets, with markets like Lira recording the lowest prices of below 1,000 UGS/kg to over 2,000 UGS/kg in Kampala market in March 2025. Bean prices, on average, remained slightly above both the five-year average and the levels recorded in the same period the previous year with m-o-m ease in March. Similarly, sorghum price also eased in March, with latest national average price nearly at same levels as the long-term average and at least 4 percent below a year ago. The 2024 second season harvests in bimodal areas were estimated to be near average however with regional disparities due to poor rainfall distribution. High regional export demand for maize weighed in on local prices over the first quarter despite improved market supply from seasonal harvests.

FIG 12. UGANDA – NATIONAL AVERAGE PRICE OF KEY STAPLES



SOURCE: WFP CO

8. Market and Trade Outlook Apr-Jun 2025

DJIBOUTI

Whereas the country's markets are highly vulnerable to international trade dynamics given its heavy reliance on imports, prices of key food commodities including rice, wheat flour, pasta and vegetable oil are expected to remain stable in the short term given past trends. This is supported by policies on price controls and stable macroeconomic environment favouring trade.

ETHIOPIA

Meher harvests concluded in December in Western agricultural regions and Belg-receiving areas improved market supply helping slightly ease prices early in the year. Prevailing macroeconomic challenges, localized conflicts, and high fuel costs are likely to keep prices elevated over the next months.

KENYA

Dry maize and beans prices are expected to remain elevated during the main lean season (April-July) following below average harvests in recent season in bi-modal areas. Whereas cross border trade with neighbouring Uganda and Tanzania plays a critical role in bridging local demand deficits, increasing prices in these neighbouring countries due to high regional demand would likely exert upward pressure on commodities' prices in the local markets.

RWANDA AND BURUNDI

Recent season A harvests (accounting for about 60 percent of annual staple production) boosted market supply and helped ease maize prices in Rwanda and Burundi during the first quarter. Ample availability of maize is expected to keep prices low in the short term. On the contrary, dry beans price exhibited increasing trends and are likely to remain elevated through the lean season (April-May). High production and transportation costs remain a high risk to price stability.

SOMALIA

Reduced availability following consecutive seasons of below average production due to poor rainfall distribution will likely impact on cereal prices over the next months. Prices of key cereals (maize and sorghum) are likely to remain elevated in most parts of the country in the short to medium term, with significant variation across regions.

SOUTH SUDAN

Food prices are likely to remain elevated in most parts of the country in the short to medium term. This is primarily due to current economic challenges marked by high exchange rates and hyperinflation, high transportation and transactional costs, localized conflict, scarcity linked to logistical challenges, and disruption of cross border trade with Sudan in addition to the beginning of the lean season. The combined effect of these factors constrain trade leading to high price volatility.

SUDAN

DESPITE RECENT HARVESTS, PRICES remain significantly higher than pre-conflict levels and are likely to remain elevated across most parts of the country with considerable regional variation. Below average production, logistical and macroeconomic challenges are expected to keep prices elevated. High food prices versus low purchasing power will likely continue to negatively impact on food security outcomes.

UGANDA

High regional demand for Ugandan cereals exerted upward pressure on local prices leading to atypical increase during the first quarter. With production estimated to be below average in recent seasons in neighbouring importing countries, local prices are likely to be elevated in the short term as stocks diminish while demand for exports increases.

Endnotes

¹ This section is based on FAO [Food Price Index](#), FAO FPMA Bulletins ([February](#) and [March](#) and [April](#) 2025)

² FAO [Food Price Index](#).

³ Section summary based of January, February and March 2025 [AGRA Reports](#).

⁴ The Guardian. 2025 *Maize production hits 11.7 million tonnes in 2024/2025*. IPP Media https://www.ippmedia.com/the-guardian/business/read/maize-production-hits-117-million-tonnes-in-20242025-2025-02-03-163314?utm_source

⁵ Geoglam. 2025 Crop Monitor for Early Warning, April 2025. https://static1.squarespace.com/static/636c12f7f9c2561de642a866/t/67ee1723b6fd54d0e31c470/1743692153966/EarlyWarning_CropMonitor_202504.pdf

⁶ Government of Kenya. [Monetary Policy Committee Meeting](#), 6 August 2024

⁷ Global Business Outlook. 2025. *Uganda's Central Bank maintains policy rate at 9.75% for December 2024*. GBO. <https://globalbusinessoutlook.com/banking-and-finance/ugandas-central-bank-maintains-policy-rate-for-december/>

⁸ OPEC. 2025. Monthly Oil Market Report, April 2025. OPEC. Vienna. <https://momr.opec.org/pdf-download/>

⁹ WFP. Sudan Market Bulletins - [March](#), [April](#) 2025.

¹⁰ FEWS Net. Ethiopia Food Security Outlook-September 2024 to January 2025. October 2024. <https://fscluster.org/sites/default/files/2024-11/FEWS%20NET-Ethiopia%20Food%20Security%20Outlook-September%202024%20to%20January%202025.pdf>

This is a joint publication by Vulnerability Analysis and Mapping (VAM) and Procurement of the World Food Programme (WFP) Regional Bureau for Eastern Africa in Nairobi (RBN).

For more information: RBNRAM.info@wfp.org & RBN_Food_Procurement_Team@wfp.org