



WFP MOZAMBIQUE – Food Price Bulletin

2nd Quarter 2025, Research Assessment and Monitoring (RAM) Unit

Key highlights

❖ Reduction in the cost of the food basket since April 2025:

During the second quarter of 2025, the overall cost of the food basket fell by 4.6 percent, driven by declining prices of staple food commodities as the new harvest reached local markets and boosted supply. As a result, households' food purchasing power, measured by the quantity of maize meal purchasable with a daily wage, increased by 8.7 percent in June 2025 compared to April. In the Northern region a notable increase of 23.2 percent in purchasing power was observed. However, compared to June 2024, food basket costs were higher in all regions (by 39.1 percent in Southern, 34.5 in Central and 15.7 in Northern provinces), leading to a year-on-year decline in purchasing power in most areas.

❖ Staple food prices show mixed trends:

The overall trend for commodity prices in the second quarter of 2025 presents noteworthy disparities, with some commodities showing evident price increases while others remained stable or declined.

Compared to April 2025, prices of large-shelled groundnuts and onions recorded notable increases (respectively by 16.7 percent and 6.3 percent), while, by contrast, a steep price decline was recorded for cowpeas (16.7 percent), followed by maize meal and imported rice (at 14.3 percent), and local brown sugar (12.2 percent). Price stability was noted for wheat flour (local), butter beans and iodized salt.

Compared to January 2025 (peak of the lean season), prices presented a sharp decrease, with large shelled groundnuts and cowpeas showing the deepest decline by 25.0 percent, followed by a 14.3 percent decrease for imported rice, 12.2 percent for local brown sugar, and 7.1 percent for maize meal, while increases were observed for onions and iodized salt at respectively 12.5 percent and 10.0 percent.

Compared to June 2024, prices of most commodities increased, particularly maize meal (22.9) percent, vegetable oil (17.6 percent), large-shelled groundnuts and butter beans (both by 16.7 percent), and imported rice (12.9 percent). By contrast, prices of wheat flour and onions presented sharp decreases.

CONTEXT

Seasonality in Mozambique

Mozambique's agricultural production is mainly characterised by low to moderate productivity of a wide selection of staple crops and a diverse variety of annual and perennial horticultural products, and cash crops. According to the seasonal calendar, **June is the harvest season** in the Northern region and the end of harvesting and beginning of the second planting season for the Southern and Central regions. During this period, **staple crop prices and food prices typically decline significantly** as the incoming **harvest reaches local markets**, thus increasing the supply.

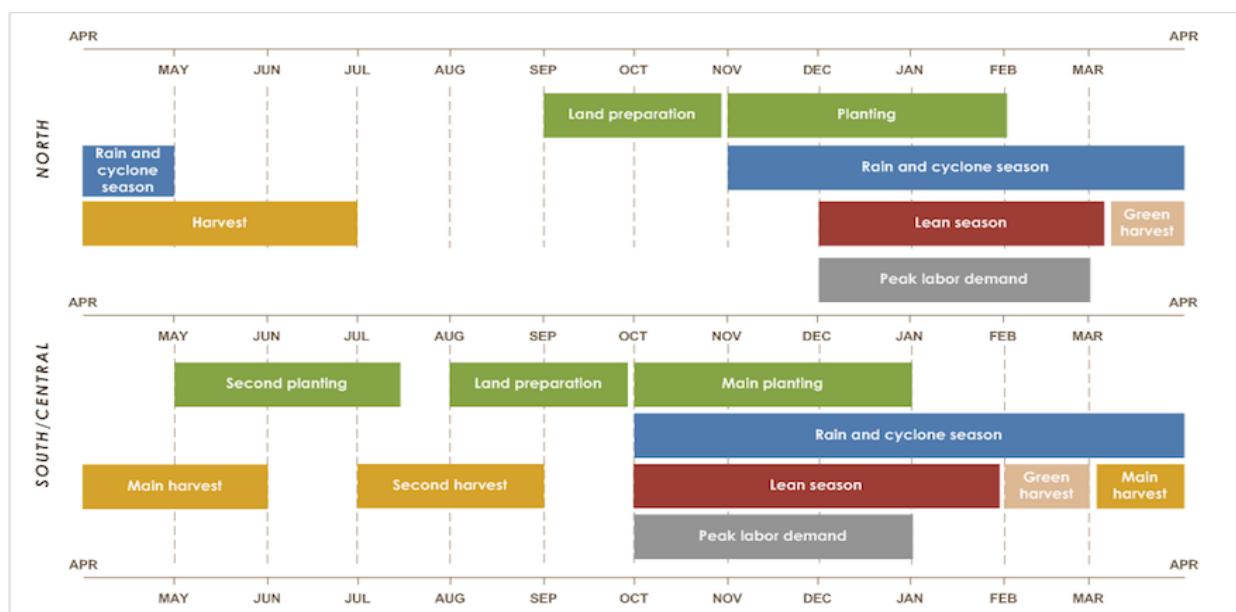


Figure 1. Seasonal calendar for a typical year in Mozambique

Additionally, in the past three months no major shocks were detected in the country. Therefore harvesting activities have likely been carried out without major problems.

Food basket and Purchasing Power analysis

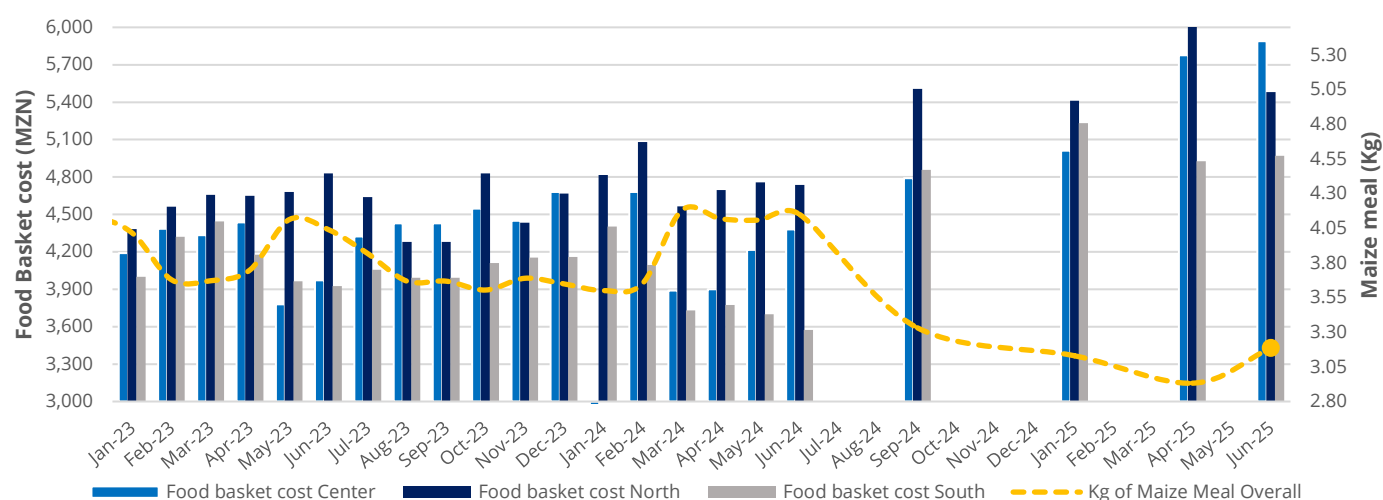
The present section analyses the price variations, focusing on essential food commodities that compose the main WFP assistance food basket¹. This component provides an important indicator of the balance between agricultural production and market demand, and so the affordability for WFP beneficiaries.

The food basket cost analysis for Mozambique reveals significant regional disparities and trends affecting the purchasing power of its citizens across the Northern, Central, and Southern regions. **Between April and June 2025, the overall cost of the food basket decreased by 4.6 percent**, driven by a 14.8 percent decline observed in the Northern region, while in the Central and Southern regions it remained stable or increased slightly. **Compared to a year before**, however, the food basket costs increased in all regions, with rises of **39.1**, **34.5** and **15.7 percent** in the **Southern**, **Central** and **Northern** regions, respectively, mainly due to year-on-year higher maize meal and vegetable oil prices.

In terms of **purchasing power through the lens of maize meal** - a staple food - the quantity purchasable with the same amount of daily wage has seen a **general increase** as the overall quantity of maize meal that could be bought increased by 8.7 percent in June 2025, compared to April 2025, with the Northern region recording a remarkable increase of 23.2 percent, while it remained stable or increased slightly in the Central and Southern regions. Year-on-year, however, there has been a notable drop in the purchasing power in the Central region (at 40.0 percent) - the largest decrease -, followed by the Northern region (31.4 percent), while the Southern region presented 8.0 percent increase.

Data point to a challenging economic environment for Mozambican consumers, with the cost of essential food items increasing at rates that outpace the ability to maintain previous consumption levels. This trend necessitates ongoing monitoring and potential intervention to support the affected populations, particularly in the Central region, which is experiencing the most significant strain on purchasing power.

Figure 2. Food basket and purchasing power analysis for Mozambique.



¹ Food basket composition by region:

Southern Region (Inhambane, Gaza, Maputo) basket - Maize meal: 37.5Kg, Rice: 5Kg, Butter beans: 8Kg, Vegetable Oil: 4L, Groundnuts: 3Kg and Salt: 1Kg

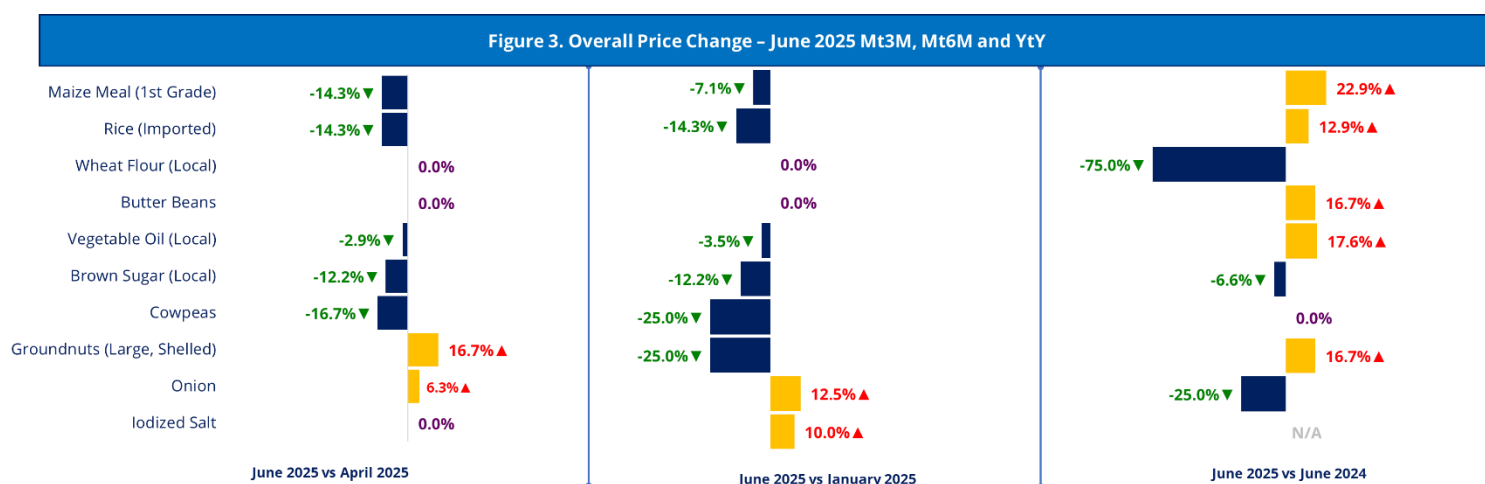
Central Region (Manica, Sofala, Tete, Zambesia) basket - Maize meal: 40Kg, Butter beans: 12Kg, Vegetable Oil: 5L and Salt: 1Kg

Northern Region (Cabo Delgado, Niassa, Nampula) basket - Maize meal: 19Kg, Rice: 30Kg, Butter beans: 10Kg, Vegetable Oil: 5L and Salt: 1Kg

Commodity price trends in Mozambique and provincial variations

Country-level overall price trends

The overall trend for commodity prices during the second quarter of 2025 presents noteworthy disparities, with some commodities showing evident price increases while others remained stable or declined. **Compared to April 2025**, prices of large-shelled groundnuts and onion increased (respectively at 16.7 percent and 6.3 percent), while price declines were recorded for cowpeas (16.7 percent), maize meal and imported rice (both by 14.3 percent), and local brown sugar (12.2 percent). Price stability was noted for wheat flour (local), butter beans and iodized salt. **Compared to January 2025**, most prices presented a sharp decrease, with large shelled groundnuts and cowpeas showing the deepest decline of 25.0 percent, followed by a 14.3 percent decrease for imported rice, 12.2 percent for local brown sugar, and 7.1 percent for maize meal, while increases were observed for onion and iodized salt at respectively 12.5 percent and 10.0 percent. **Compared to June 2024** prices of most commodities increased substantially, particularly maize meal (by 22.9 percent), vegetable oil (17.6 percent), large shelled groundnuts and butter beans (both at 16.7 percent) and imported rice (12.9 percent). Prices of wheat flour and onion presented a decrease of 75.0 percent (likely due to year-on-year lower international quotations) and 25.0 percent, respectively.



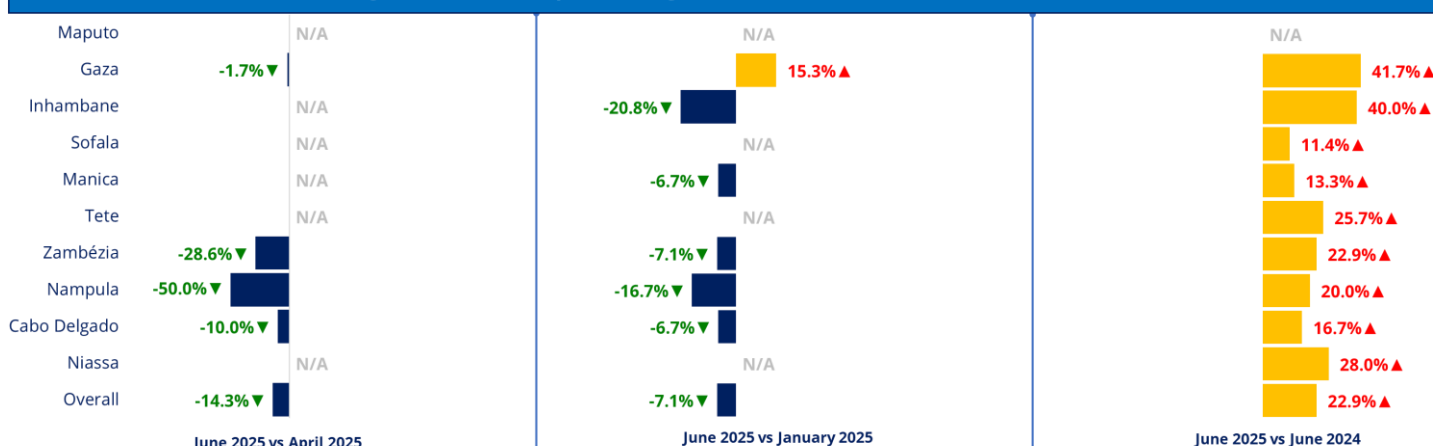
Provincial price trends



Maize meal (white, first grade)

The price for maize meal presented an average decrease of 14.3 percent during the second quarter of 2025. Compared to April 2025, prices declined in all monitored provinces and Nampula recorded the deepest decrease of 50.0 percent, followed by 28.6 percent in Zambezia and 10.0 percent in Cabo Delgado, while prices remained stable in other provinces. Compared to June 2024, the overall price for maize meal presented notable price increases in all monitored provinces, with the highest maize meal price increase seen in Gaza at 41.7 percent, followed by Inhambane at 40.0 percent. The highest and lowest provincial prices were recorded in Niassa, Cabo Delgado and Manica (75 Mt/Kg) and Gaza (59 Mt/Kg), respectively.

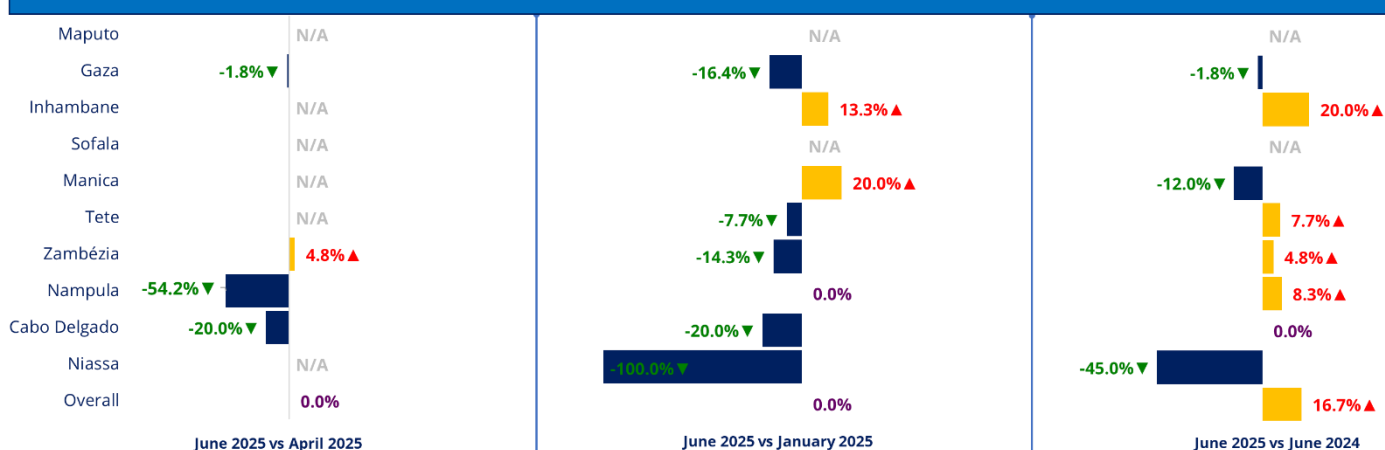
Figure 4. Provincial price change of Maize Meal – June 2025 Mt3M, Mt6M and YtY



Butter beans

Compared to April 2025, the price for butter beans in June declined sharply in Nampula (54.2 percent) and Cabo Delgado (20.0 percent), while price stability was observed in Gaza and a slight price increase in Zambezia (4.8 percent). Compared with January 2025, Manica and Inhambane recorded price increases by 20.0 percent and 13.3 percent respectively, while prices plummeted in Niassa (by 100.0 percent), and also declined in Cabo Delgado (by 20.0 percent) and Gaza (16.4 percent), while they remained virtually stable in Nampula. Niassa is one of the main butter beans production areas in the country and the strong price reduction is likely due to a bumper harvest obtained in 2025. Compared with June 2024, a strong price decline of 45.0 percent was recorded in Niassa, while a notable price increase was reported in Inhambane (20.0 percent) and a less prominent one in Nampula, Tete and Zambezia (all below 10.0 percent). The highest and lowest provincial prices were recorded in Inhambane (150 Mt/Kg) and Niassa (50 Mt/Kg), respectively.

Figure 5. Provincial price change of Beans (Butter) – June 2025 Mt3M, Mt6M and YtY

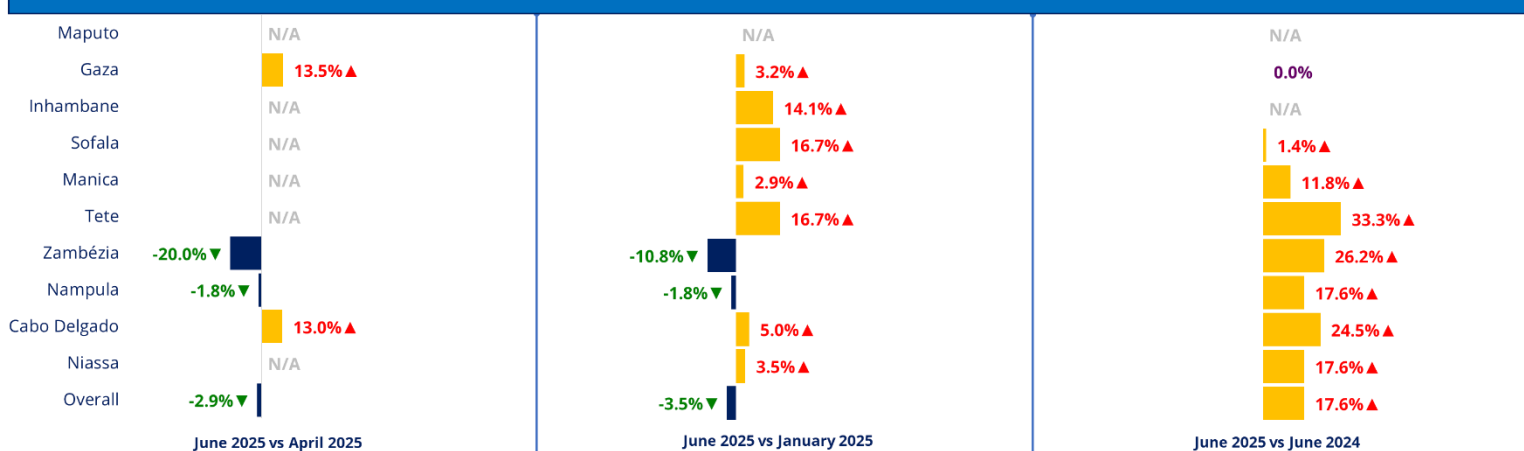


Vegetable oil (local)

In June, compared to April 2025, a general price decline for local vegetable oil was recorded at 2.9 percent with a remarkable decline in Zambezia by 20.0 percent, while an opposite trend was observed in Gaza and Cabo Delgado, where prices increased by respectively 13.5 percent and 13.0 percent. Over the six months comparison, a general 3.5 percent decrease was noted, while Tete and Sofala displayed a 16.7 percent increase between April and June 2025, followed by substantial price increases in Inhambane and Cabo Delgado (at 14.1 percent and 5.0 percent

respectively). Cabo Delgado recorded the highest price at 200 Mt/l, while the lowest was recorded in Gaza at 155 Mt/l.

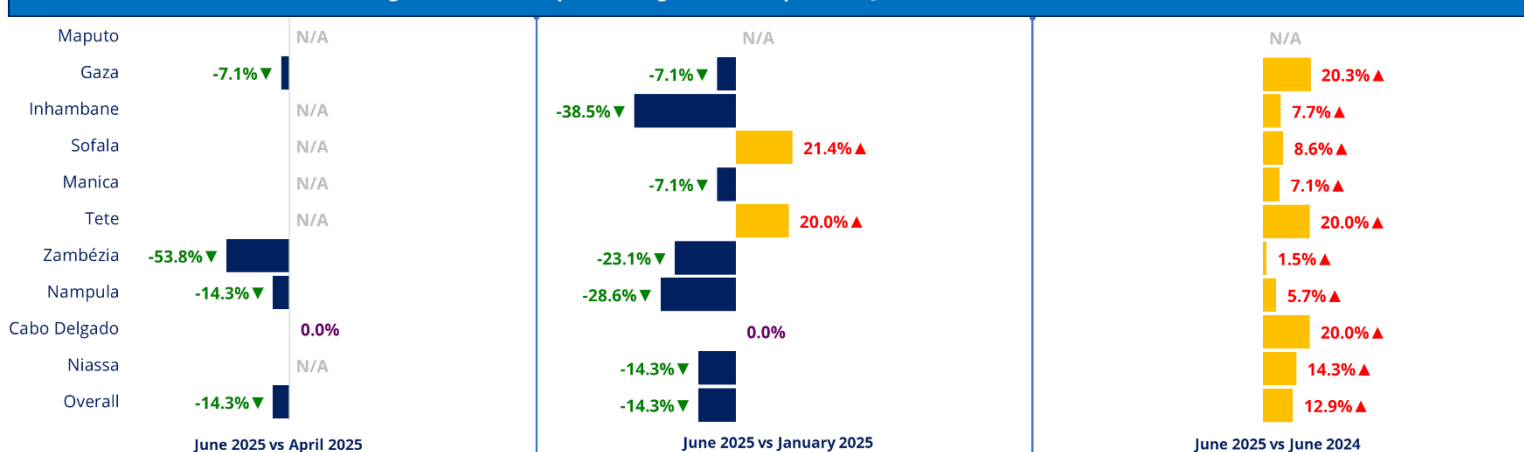
Figure 6. Provincial price change of Vegetable Oil – June 2025 Mt3M, Mt6M and YtY



Rice (imported)

In June 2025, compared to April 2025, the price of imported rice decreased sharply in Zambezia (53.8 percent), and also by a lesser extent in Nampula and Gaza (14.3 percent and 7.1 percent, respectively), while in Cabo Delgado prices remained unchanged. Moreover, mixed trends on imported rice prices were observed on the six-month comparison with an impactful decline occurring in Inhambane (38.5 percent), followed by 28.6 in Nampula, 23.1 percent in Zambezia and less marked declines in Niassa, Manica and Gaza. By contrast prices increased in Sofala and Tete by 21.4 percent and 20.0 percent, respectively. Compared to June 2024, a general upward trend was observed in all provinces with the highest price hike noted in Gaza, Tete and Cabo Delgado at 20.0 percent. The highest provincial price was recorded in Cabo Delgado (80 Mt/Kg) and the lowest in Zambezia and Inhambane (65 Mt/Kg).

Figure 7. Provincial price change of Rice (imported) – June 2025 Mt3M, Mt6M and YtY

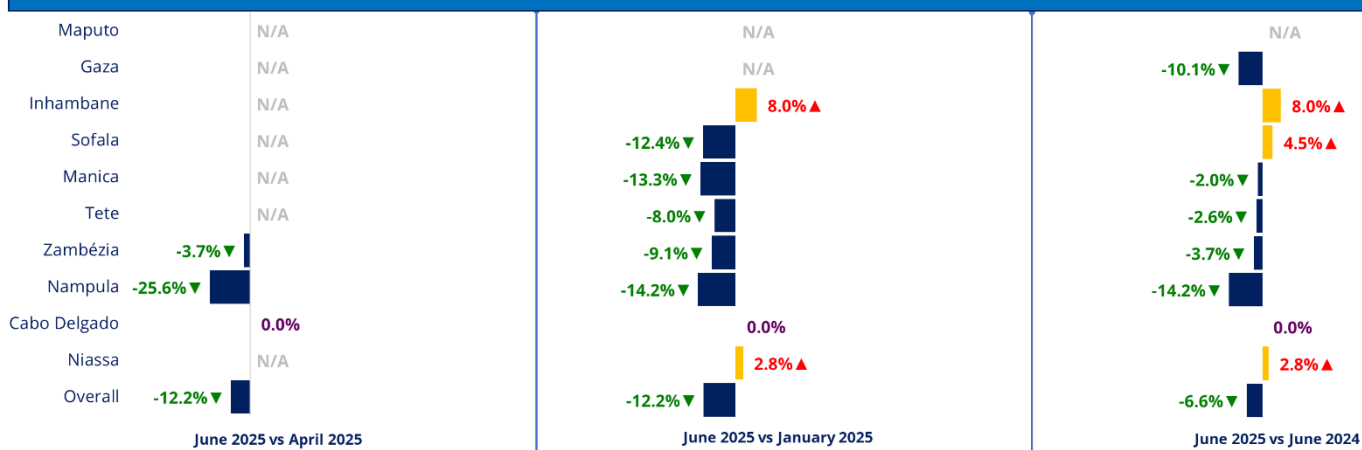




Brown sugar (local)

Overall local brown sugar prices declined over all three comparison periods. Compared to April 2025, a 25.6 percent decline was observed in Nampula, followed by 3.7 percent in Zambezia. Over the six months and year-on-year comparisons, prices declined in all monitored provinces except Inhambane and Niassa, where they increased slightly, and in Maputo and Cabo Delgado where they remained stable. The highest price for brown sugar in April 2025 was recorded in Cabo Delgado at 100 Mt/kg, while the lowest was observed in Manica and Nampula at 88 Mt/kg.

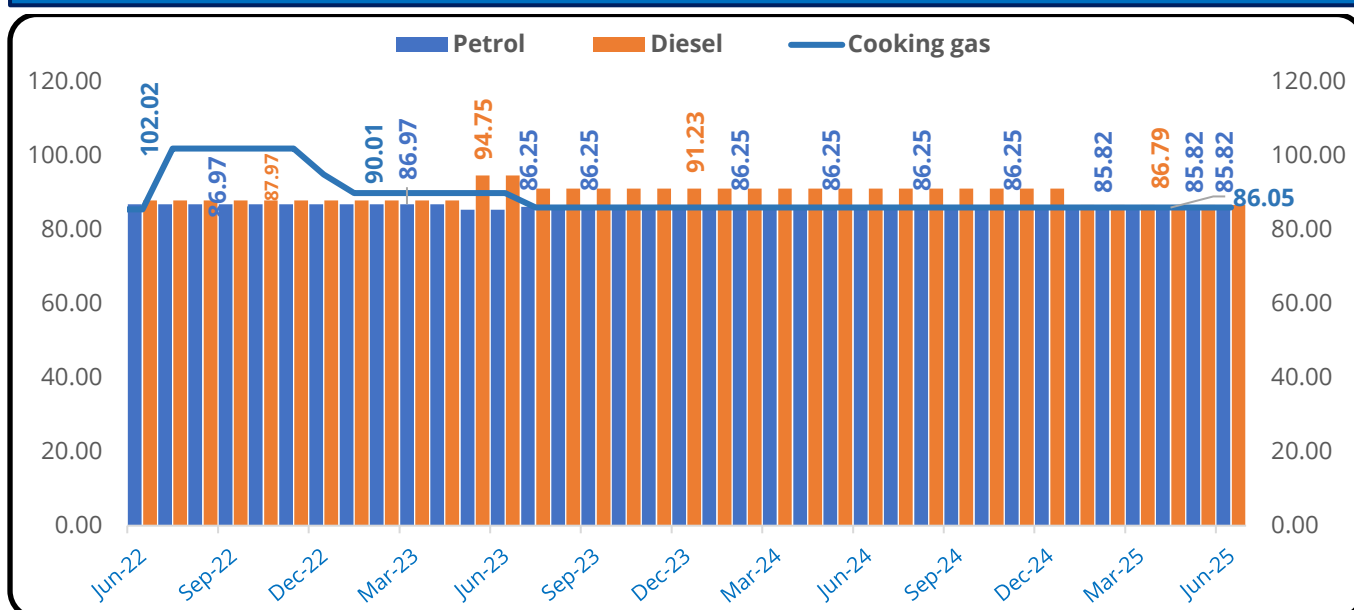
Figure 8. Provincial price change of Brown Sugar – June 2025 Mt3M, Mt6M and YtY



Fuel

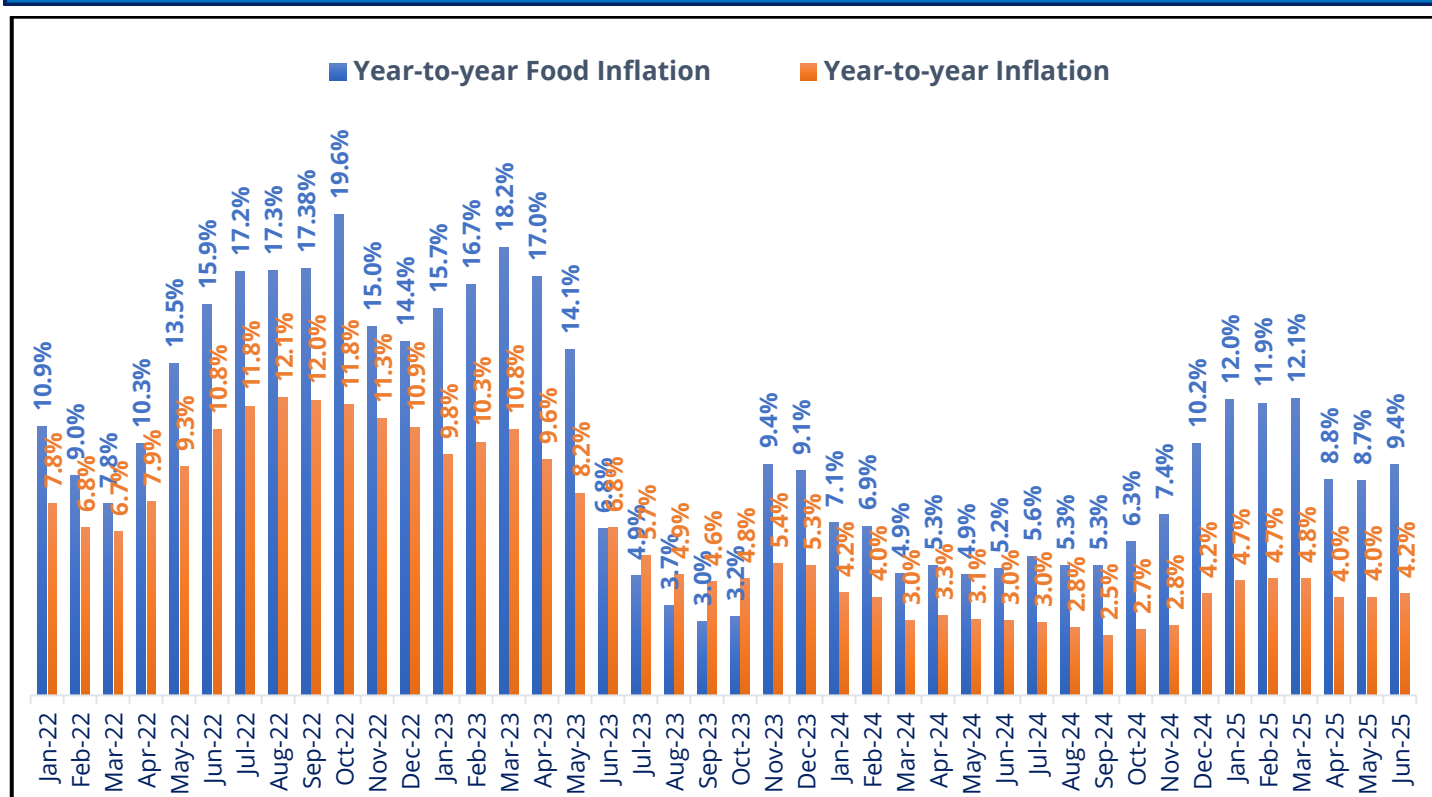
In Mozambique, the Energy Regulatory Authority (ARENE) maintained fuel prices stable in June 2025 at the same level as per the last change in January 2025, with gasoline costing in the main cities of the country 85.82 meticaïs per litre, while diesel commercialized at 86.79 Mt/l and cooking gas at 86.05 Mt/l. In early July a reduction in the price of diesel was registered, (current price MZN 79.88 per litre), which will be reflected in next quarter bulletin.

Figure 12. FUEL PRICES (Autoridade Reguladora de Energia - ARENE)



The annual inflation rate in Mozambique reached a three-month high of 4.15 percent in June 2025. This rate marks a slight increase by 0.15 points compared to the previous month, mainly due to increases in food prices which resulted in food & non-alcoholic beverages inflation rising from 8.73 percent in May to 9.38 percent in June. These changes, however, remain within the target set by the Bank of Mozambique (4.9 percent), also due to the recent decision to exempt some basic products from VAT and reduce road toll rates by up to 60 percent, which helped prevent further price increases. Reductions also were applied to interest rates, aimed at stimulating consumption, attracting private investment and improving the business environment. The generally low inflationary pressures are largely driven by the stability of the nominal exchange rate (USD/MZN), despite internal pressures stemming from rising demand for foreign currency by importers.

Figure 13. Inflation Rate (Instituto Nacional De Estatística - INE)



The Research, Assessments, and Monitoring (RAM) team of the World Food Programme (WFP) collects the prices of different commodities in different districts of all provinces of Mozambique.

Price data is collected through in person surveys (in ODK) at three (3) different shops (vendors) in each market. Prices for all target food commodities are collected in the main markets in all districts. Prices are then analysed by the RAM unit at the country office after proper data cleaning and they feed into this bulletin and into other products used by WFP and partners to inform humanitarian activities. In order to calculate provincial and national prices, the median is used to reduce the effect of *outliers*.

Research, Analysis and Monitoring (RAM) team – WFP Mozambique:

Francesco Stompanato francesco.stompanato@wfp.org

Panfilio Malamule panfilio.malamule@wfp.org

Elena Conte elena.conte@wfp.org



Annex I. June 2025 retail market price (median) of main commodities in different provinces (MZN/Kg)

Commodities List	Province	Current price	Price Change			Commodities List	Province	Current price	Price Change		
			3 Month (%)	6 Month (%)	1 Year (%)				3 Month (%)	6 Month (%)	1 Year (%)
Maize Meal (1st Grade)	Overall	70	-14.3%	▼	-7.1%	▼	22.9%	▲			
	Niassa	75	-		0.0%		28.0%	▲			
	Cabo Delgado	75	-10.0%	▼	-6.7%	▼	16.7%	▲			
	Nampula	60	-50.0%	▼	-16.7%	▼	20.0%	▲			
	Zambézia	70	-28.6%	▼	-7.1%	▼	22.9%	▲			
	Tete	70	-		0.0%		25.7%	▲			
	Manica	75	-		-6.7%	▼	13.3%	▲			
	Sofala	70	-		0.0%		11.4%	▲			
	Inhambane	60	-		-20.8%	▼	40.0%	▲			
	Gaza	59	-1.7%	▼	15.3%	▲	41.7%	▲			
	Maputo	-	-		-		-				
Wheat Flour (Local)	Overall	80	0.0%		0.0%		-75.0%	▼			
	Niassa	78	-		-3.2%	▼	-3.2%	▼			
	Cabo Delgado	80	-25.0%	▼	-12.5%	▼	-21.9%	▼			
	Nampula	90	0.0%		2.8%	▲	11.1%	▲			
	Zambézia	80	6.3%	▲	35.0%	▲	3.1%	▲			
	Tete	80	-		37.5%	▲	-3.1%	▼			
	Manica	83	-		12.1%	▲	15.2%	▲			
	Sofala	85	-		-11.8%	▼	5.9%	▲			
	Inhambane	80	-		-9.4%	▼	-				
	Gaza	70	0.0%		-7.1%	▼	-				
	Maputo	-	-		-		-				
Vegetable Oil (Local)	Overall	170	-2.9%	▼	-3.5%	▼	17.6%	▲			
	Niassa	170	-		3.5%	▲	17.6%	▲			
	Cabo Delgado	200	13.0%	▲	5.0%	▲	24.5%	▲			
	Nampula	170	-1.8%	▼	-1.8%	▼	17.6%	▲			
	Zambézia	163	-20.0%	▼	-10.8%	▼	26.2%	▲			
	Tete	180	-		16.7%	▲	33.3%	▲			
	Manica	170	-		2.9%	▲	11.8%	▲			
	Sofala	180	-		16.7%	▲	1.4%	▲			
	Inhambane	160	-		14.1%	▲	-				
	Gaza	155	13.5%	▲	3.2%	▲	-				
	Maputo	-	-		-		-				
Brown Sugar (Local)	Overall	89	-12.2%	▼	-12.2%	▼	-6.6%	▼			
	Niassa	93	-		2.8%	▲	2.8%	▲			
	Cabo Delgado	100	0.0%		0.0%		0.0%				
	Nampula	88	-25.6%	▼	-14.2%	▼	-14.2%	▼			
	Zambézia	92	-3.7%	▼	-9.1%	▼	-3.7%	▼			
	Tete	93	-		-8.0%	▼	-2.6%	▼			
	Manica	88	-		-13.3%	▼	-2.0%	▼			
	Sofala	89	-		-12.4%	▼	4.5%	▲			
	Inhambane	98	-		8.0%	▲	8.0%	▲			
	Gaza	91	-		-		-10.1%	▼			
	Maputo	-	-		-		-				
Groundnuts (Large, Shelled)	Overall	120	16.7%	▲	-25.0%	▼	16.7%	▲			
	Niassa	130	-		-1.9%	▼	23.1%	▲			
	Cabo Delgado	109	8.3%	▲	-10.1%	▼	17.4%	▲			
	Nampula	110	-36.4%	▼	-63.6%	▼	9.1%	▲			
	Zambézia	100	-20.0%	▼	-80.0%	▼	5.0%	▲			
	Tete	135	-		11.1%	▲	-				
	Manica	180	-		38.9%	▲	-				
	Sofala	60	-		-150.0%	▼	-100.0%	▼			
	Inhambane	160	-		18.8%	▲	6.3%	▲			
	Gaza	160	-6.3%	▼	-25.0%	▼	-				
	Maputo	-	-		-		-				
Cowpeas	Overall	60	-16.7%	▼	-25.0%	▼	0.0%				
	Niassa	50	-		-40.0%	▼	-60.0%	▼			
	Cabo Delgado	70	7.1%	▲	0.0%		10.7%	▲			
	Nampula	45	-122.2%	▼	-77.8%	▼	-11.1%	▼			
	Zambézia	60	-33.3%	▼	0.0%		-8.3%	▼			
	Tete	100	-		0.0%		0.0%				
	Manica	40	-		-75.0%	▼	-87.5%	▼			
	Sofala	30	-		-166.7%	▼	-				
	Inhambane	120	-		20.8%	▲	41.7%	▲			
	Gaza	65	-		-53.8%	▼	-23.1%	▼			
	Maputo	-	-		-		-				
Onion	Overall	50	0.0%		10.0%	▲	20.0%	▲			
	Niassa	60	-		33.3%	▲	33.3%	▲			
	Cabo Delgado	40	-25.0%	▼	-25.0%	▼	0.0%				
	Nampula	40	-75.0%	▼	-25.0%	▼	0.0%				
	Zambézia	50	0.0%		30.0%	▲	20.0%	▲			
	Tete	50	-		0.0%		0.0%				
	Manica	50	-		-15.0%	▼	5.0%	▲			
	Sofala	50	-		0.0%		0.0%				
	Inhambane	38	-		-13.3%	▼	20.0%	▲			
	Gaza	40	-		-		25.0%	▲			
	Maputo	-	-		-		-				
Iodized Salt	Overall	80	6.3%	▲	12.5%	▲	-25.0%	▼			
	Niassa	93	-		8.1%	▲	-8.1%	▼			
	Cabo Delgado	75	-20.0%	▼	3.3%	▲	-73.3%	▼			
	Nampula	73	-37.9%	▼	-10.3%	▼	-37.9%	▼			
	Zambézia	70	0.0%		-71.4%	▼	-42.9%	▼			
	Tete	80	-		68.8%	▲	-12.5%	▼			
	Manica	80	-		-56.3%	▼	-6.3%	▼			
	Sofala	100	-		25.0%	▲	-				
	Inhambane	73	-		10.3%	▲	3.4%	▲			
	Gaza	60	16.7%	▲	0.0%		-16.7%	▼			
	Maputo	-	-		-		-				