

The Food Price Monitor: Kenya is a monthly report developed for the Food Security Portal (FSP), facilitated by IFPRI, with the goal of providing clear and accurate information on commodity price trends and variations in selected markets throughout Kenya. The reports are intended as a resource for those interested in agricultural commodity markets in Kenya, namely producers, traders, consumers, or other agricultural stakeholders.

## Highlights

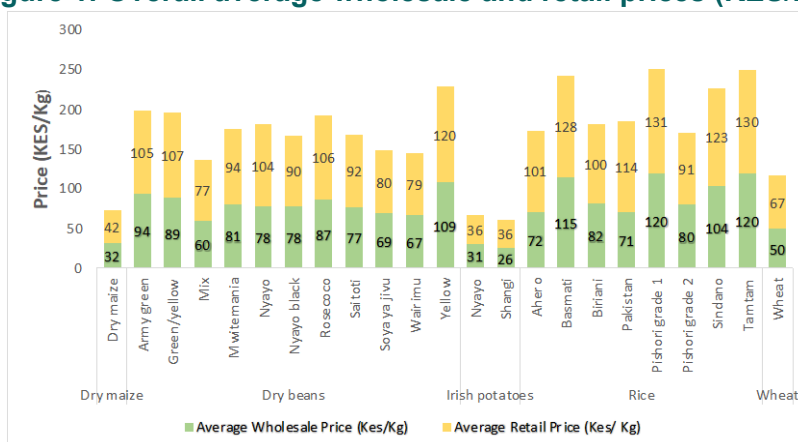
- ▶ Compared to June, most commodity prices remained stable in July. Only rice recorded a significant price increase.
- ▶ The price of Irish potatoes experienced a downward trend for the last three weeks of July; this trend is expected to continue into the first few weeks of August as most producing zones enter the harvesting season. Notably, most Irish potatoes produced are ware varieties, which are rarely exported; thus, the harvest season creates a temporary glut.
- ▶ For most key commodities, prices remained above the government recommended prices set during the COVID-19 period.
- ▶ As expected, wholesale prices remained lower than retail prices, with margins ranging from 8% to 38%.

## Overall Wholesale and Retail Prices for July

As anticipated, average retail prices were higher than wholesale prices during the month of July (Figure 1-1). Additionally, several food commodities recorded a consistently higher price margin (more than 25%), while others recorded a consistently lower price margin (less than

10%). Commodities that recorded higher price margins included Irish potatoes (*shangi* variety, with a margin of 28%), Ahero rice (29%), and Pakistan rice (38%). Commodities that recorded lower price margins included yellow beans (9%), Pishori grade 1 rice (8%), and *Tamtam* rice (8%). Differences in wholesale and retail price margins are attributable to the production source, re-packaging, seasonality, and existence of middlemen and produce brokers.

Figure 1: Overall average wholesale and retail prices (KES/Kg)



Source: Daily Market Survey for the month of July

## Wholesale and Retail Commodity Prices

Commodity prices for the five key commodities varied regionally, as shown in Table 1. Compared to the overall average retail prices for the month of July, average retail prices for green/yellow beans were higher in Eldoret (130 KES/kg), Kisumu (114 KES/kg), Nairobi (120 KES/kg), and Nyeri (110KES/kg). This is compared to the national average of KES 107/kg. Average retail prices for *Mwitemania* beans were higher in Kisumu (104KES/kg), Nairobi (120KES/kg), and Nyeri (98KES/kg) compared to the overall retail price for the month of July (94KES/kg); however, wholesale prices for *Mwitemania* beans were only higher than the overall wholesale price (81KES/kg) in Nairobi

(113KES/kg). Notably, retail prices for most dry bean varieties were observed to be higher in Eldoret, Kisumu, and Nairobi, whereas wholesale prices were higher in Eldoret and Nairobi. Kisumu, Mombasa, and Nairobi are highly populated urban areas, where consumption is expected to be on the higher side. Similarly, higher bean prices in Eldoret can be explained by the fact that locally produced beans were being harvested and dried during July and were thus not ready for the market; rather, the dry beans traded in the region were sourced from Busia in Uganda. Overall, average retail prices for Rosecoco and *Mwitemania* beans were higher in all regions than the government recommended prices for staple foods during the COVID19 period (93KES/kg and 76KES/kg, respectively).

**Table 1: Average wholesale and retail prices (kes/kg) by region for July**

		Average of retail price per kg						Average of w/sale price per kg					
		Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri
Dry beans	Army green			90		110							
	Green/yellow	130	114	88	120	81	110	116	91	79	87	75	83
	Mix						77						60
	Mwitemania		104	89	120	69	98		73	77	113	75	78
	Nyayo	110	102	89	120				90	73	76	84	
	Nyayo black			90							78		
	Rosecoco	125	106		121	81	96	111	84		89	76	76
	Saitoti			89	120					77	83		
	Soya ya jivu			80							69		
Wairimu	89		80	88	61	80	80		69	66	59	65	
Yellow	120							109					
Dry maize	Dry maize	33	51	40	46	36	42	31	34	33	33	31	32
Irish potatoes	Nyayo		36						31				
	Shangi	19	38	34	56	39	33	15	28	25	41	21	24
Rice	Ahero		101							72			
	Basmati	130		120	130	130	132	125		108	114	112	114
	Biriani			100						82			
	Pakistan		114						71				
	Pishori grade 1	157	124	150	159	91	148	155	76	132	138	77	124
	Pishori grade 2	104				80		100				72	
	Sindano	130	121	130	115	120	116	128	75	120	94	100	101
Tamtam			130						120				
Wheat	Wheat	75		60	75	52	81	58		47	49	45	51

Dry maize recorded higher average retail and wholesale prices in Kisumu and Nairobi than the national average retail prices (42KES/kg and 32KES/kg, respectively). Apart from Eldoret, where average retail prices were similar to the government recommended price (33KES/kg), the other covered regions recorded maize prices higher than the recommended price. This could be attributable to the fact that maize was off-season during the month of July; thus, traders relied on imports and took advantage of low local supply.

Dry wheat was not commonly found in the studied markets during July; as a result, this commodity recorded higher retail prices in Eldoret, Nairobi, and Nyeri than both the national average retail price (67KES/kg) and the recommended price (36KES/kg). These higher prices could be attributed to seasonality, as wheat is mainly harvested in

Eldoret and its neighboring producing areas around the month of September. There has also been a consistent reduction in locally produced wheat in Kenya, mainly due to adverse effects of changing weather patterns, reductions in land size to achieve commercial viability, and increased production costs.

Basmati rice and Pishori grade 1 rice<sup>1</sup> both recorded higher retail and wholesale prices in almost all regions compared to the other rice varieties available and compared to national average retail and wholesale prices. These higher prices could be attributable to both the quality and the source of these rice varieties. Imported rice is expected to fetch higher prices than locally produced rice, while high-quality (graded) rice is likely to fetch higher prices than non-graded and broken rice. Notably, however, the average retail and whole prices of both Basmati and

<sup>1</sup> Kenya's version of Basmati rice

Pishori grade 1 rice were lower than the government recommended price (170KES/Kg for Basmati/aromatic rice) in all the regions.

During July, the *Shangi*<sup>2</sup> variety of Irish potato was the most commonly found across all selected regions, compared to other varieties such as the *Nyayo* variety.<sup>3</sup> Although Irish potatoes were an on-season commodity during the month of July, higher prices recorded in the urban areas could be attributed to transport cost and government regulations on production and trade enforced in June 2021<sup>4</sup>. Compared to the national average retail price of 36KES/kg, retail prices were higher in Kisumu, Nairobi, and Nakuru, while wholesale prices were higher in Kisumu and Nairobi. Apart from the Nairobi region, all other selected regions recorded lower average retail and wholesale prices for Irish potatoes than the government recommended price (50KES/kg).

## Wholesale and Retail Price Trends by Region

Overall price trends varied across regions. Eldoret portrayed variations in both weekly retail and weekly wholesale commodity prices in the month of July. When comparing week 5 prices with week 1 prices, an increase in wholesale prices was recorded for green/yellow beans (37%), Rosecoco beans (47%), and Irish potatoes (9%), while a reduction in wholesale prices were recorded for dry maize (13%), Basmati rice (4%), and dry wheat (44%). During the same period, a reduction in retail prices was recorded for green/yellow beans, dry maize, Basmati rice, and dry wheat.

In Kisumu, a comparison between week 5 and week 1 showed a general increase in wholesale prices for most food commodities, apart from *Sindano* rice<sup>5</sup> and *Shangi* Irish potatoes; these displayed increased prices (8% and 49%, respectively). Retail prices showed a reduction across all commodities except Pakistan rice (imported).

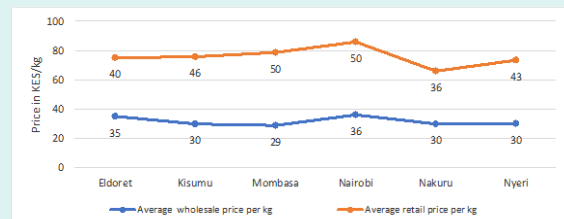
An increase in wholesale prices between week 5 and week 1 were recorded in Mombasa for all dry beans apart from *Mwitmania*, as well as for dry maize (3%) and wheat (9%). Stable wholesale prices were recorded for *Soya ya Jivu* beans, *Wairimu* beans, and Basmati rice across all weeks. A comparison of retail prices between week 5 and week 1 showed stable prices for most com-

## FOCUS ON BEANS ACROSS SELECTED REGIONS

Dry beans are grown in almost all regions in Kenya, and beans form a staple food crop that rates second after maize. Eastern, Nyanza, Central, Western, and Rift Valley regions are the major bean-growing provinces. Kenya has two seasons for common bean growth, but a significant number of farmers grow the crop only once a year due to adverse climatic conditions. The Rift Valley and the Western region grow beans once a year during March-May season (also referred to as the long rains) and harvest in June. The Central and Eastern regions grow common bean during the short rains (October-December) and harvest in December-January. The choice of variety is based on various factors: ecological requirements, maturity period, yield resistance to pests and diseases, etc. The most common varieties include Rosecoco, *Mwitmania*, *Wairimu*, *Mwezi Moja*, yellow beans, and kidney beans.

Different bean varieties registered varying prices across selected regions in July. Green/yellow beans were among the most expensive and recorded higher prices in Eldoret, Kisumu, Nairobi, and Nyeri than the national average (107KES/kg). Rosecoco beans recorded higher prices in Eldoret and Nairobi, whereas *Mwitmania* beans recorded higher prices in Kisumu and Nairobi. Compared to the national average retail price (79KES/kg), (*Wairimu* beans had lower margins (less than 10%) across all regions.

### Average Wholesale and Retail Price (KES/kg) of Beans in Selected Regions



Source: Daily Market Survey for the month of July

modities but increased prices for dry beans, especially green/yellow beans (3%), Nyayo beans (15%), and Saitoti beans (13%).

The Nairobi region recorded mixed results, with different commodities seeing both increased and reduced wholesale prices. A comparison of wholesale prices between week 5 and week 1 showed a significant increase in prices for *Mwitmania* beans and Irish potatoes and a slight increase in wheat and green/yellow bean prices. Stable wholesale prices were recorded for most commodities

<sup>2</sup> Improved variety which is in high demand; these potatoes have good yield, early maturity, short cooking time, and good taste.

<sup>3</sup> Local variety which is in low demand and is highly susceptible to diseases.

<sup>4</sup> The Irish Potato Bill 2019. Among other requirements, the law demands that potatoes be packaged in approved clean material that allows for air flow and that does not exceed 50 kg.

<sup>5</sup> Commonly produced in Kisumu County (Ahero & West Kano Irrigation schemes).

across the weeks apart from Irish potatoes, which recorded a significant increase of 86%, and maize, which saw prices decline by 13%.

Nakuru saw stable wholesale prices between weeks 3 and week 4 for most commodities apart from dry maize and Irish potatoes, both of which recorded a decline in prices. Stable prices were also recorded for retail prices; however, dry maize, Irish potatoes, and wheat showed reductions in price.

A comparison in wholesale prices between week 5 and week 1 in Nyeri showed that most commodities saw a reduction in prices, with the exception of wheat and dry beans (especially *Wairimu* and *Mwitmania* beans), all of which recorded price increases. A similar trend was seen for retail prices, which declined for most commodities except mixed beans (5%), dry maize (5%), and wheat (61%).

## Comparison of National Average Prices Between June and July

A comparison<sup>6</sup> of overall prices (national averages for all commodities) for June and July (Table 2) illustrates changes in wholesale and retail prices. Most commodities, including maize, dry beans, and Basmati and Pakistan rice, showed stable wholesale prices. However, most rice varieties saw increasing prices, while wheat and Irish potato (specifically *Shangi*) prices decreased. Most rice varieties recorded increasing average retail prices, whereas most bean varieties and Irish potatoes portrayed decreasing prices. Wheat, Nyayo beans, Rosecoco beans, and maize all showed a slight decrease in retail prices.

**Table 2: Comparison of June and July prices**

Product	Variety	Average Wholesale Price (Kes/Kg)			Average Retail Price (Kes/ Kg)		
		JUNE	JULY	percent change	JUNE	JULY	percent change
Dry maize	Maize	31	32	2%	45	42	-6%
Dry beans	Green/yellow	89	89	0%	126	107	-15%
	Mwitmania	80	81	1%	108	94	-13%
	Nyayo	86	78	-9%	114	104	-9%
	Rosecoco	89	87	-2%	115	106	-7%
	Wairimu	69	67	-4%	90	79	-13%
Irish potatoes	Shangi	31	26	-16%	47	36	-23%
Rice	Ahero	52	72	38%	92	101	10%
	Basmati	119	115	-3%	134	128	-4%
	Pakistan	74	71	-5%	93	114	23%
	Pishori grade 1	76	120	59%	93	131	41%
	Pishori grade 2	72	80	11%	80	91	14%
	Sindano	88	104	19%	111	123	11%
Wheat	Wheat	57	50	-12%	75	67	-10%
<b>key</b>							
>+10		Increasing					
>+5 but <+10		slight increase					
>-5 but <+5		Stable					
>-5 but <-10		slight decrease					
<-10		Decreasing					

Source: Daily Market Survey for June and July

<sup>6</sup> A comparison was done for common commodities for June and July.

## Outlook for the Month of August

During the month of August, the following changes are expected:

- Rice prices are expected to increase, as the main production season in the Mwea irrigation scheme began in July with harvests expected in December and January. There is also the possibility of increased imports, which may stabilize prices and temper these increases.
- Maize prices are expected to continue rising, especially in Nakuru, Eldoret, and Kisumu, as the major maize-producing areas are currently off-season. Price increases may continue until November-December when harvesting in the Rift Valley begins. However, prices in the Central region (Nyeri and Nairobi) may stabilize or decrease slightly in August when the region begins harvesting maize in August-September.
- Bean prices are expected to remain stable as most producing regions in the Central and Rift Valley regions commence harvesting in August. In some areas (Central, Eastern, and Mombasa), bean prices may fall slightly.
- Irish potatoes prices saw a downward trend in most regions for the last few weeks of July. This trend will continue as more producing areas enter the harvest season.
- Wheat prices are expected to remain stable due to minimal and mostly imported current stocks. This trend is likely to continue until September.

## FOCUS ON ELDORET REGION

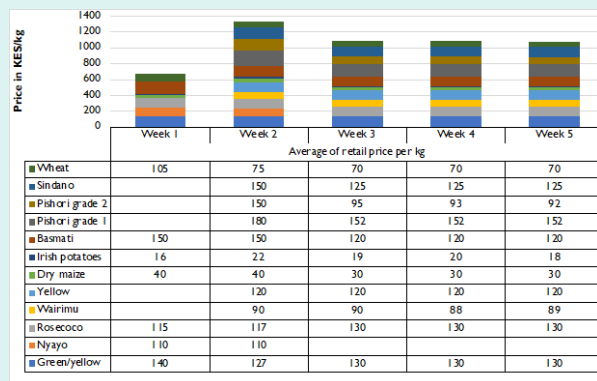
Eldoret Town, the capital of Uasin Gishu County in the North Rift region, is the fifth most populated urban area Kenya. Uasin Gishu County borders Trans-Nzoia, Nandi, and Elgeyo Marakwet Counties, which are regarded as Kenya's food basket due to prime agricultural lands and large-scale grain farming (maize, wheat, and beans) and dairy and horticultural production.

Commodity prices were collected from Eldoret Wholesale market, the largest wholesale and retail food market in Eldoret Town. To substitute low supply in July, traders sourced commodities from farms surrounding the city, neighboring counties, and neighboring countries. Rosecoco and yellow beans were sourced from Busia in Uganda, while *Wairimu* beans from local farmers around Eldoret region. Green/yellow beans, which are most in demand in the region, were sourced from local farmers and supplemented from Busia in Uganda. Rice was sourced from the Mwea irrigation scheme, the largest irrigation scheme in Kenya located in Kirinyaga County, and through imports from Tanzania and Pakistan. Pishori rice was sourced from Mwea while Sindano and Basmati rice varieties were sourced from Tanzania through the Kenya-Tanzania border in Namanga. Higher travel costs were cited as one of the reasons for increased retail prices for these particular varieties. Irish potatoes were sourced from farms within Uasin Gishu and Elgeyo Marakwet Counties. Some dry maize was sourced from farmers within the region, but the highest proportion was sourced from Uganda (Busia and Malaba). Dry wheat, though not commonly traded, was sourced from farmers in the region and from Narok County.

During July, price fluctuations were recorded for both average wholesale and average retail prices for various commodities in the region. Comparing week 5 to week 1, average wholesale prices increased for green/yellow beans (38%) and Rosecoco beans (47%). There was a marginal change for both average wholesale and retail prices for *Wairimu* beans and Irish potatoes; however, prices for yellow beans remained stable across the month.

Between week 5 and week 1, dry maize saw reductions in both average wholesale (15%) and average retail (25%) prices. Although maize is an off-season crop in the region and its surrounding counties in July, there was an influx of surplus from neighboring Uganda. All rice varieties saw a reduction in both average wholesale and average retail prices in July, while prices for wheat remained mostly stable.

## Weekly Average Prices for All Commodities in Eldoret Region



Source: Daily Market Survey for the month of July.



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## ABOUT THIS SERIES

The Food Security Portal (FSP), facilitated by the International Food Policy Research Institute (IFPRI), aims to improve food security for the world's poor and increase the resilience of global food systems against food and financial crisis. The project brings together international, regional, and country-level data, news, and research aimed at meeting countries' immediate food security needs and building long-term global food security. The FSP is designed to pool information in structured ways to ensure high-quality, timely, and relevant data and to provide the opportunity for collaboration among policymakers, development professionals, and researchers.

This report is part of the FSP's efforts to monitor country-level food prices in order to improve the governments' ability to respond to and prevent food crises. It presents monthly price trends and movements for key food commodities, including dry beans, dry maize, rice, wheat, and Irish potatoes, in selected major regions and markets in Kenya.

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## DATA COLLECTION AND METHODOLOGY

The study was conducted in the Mombasa, Nairobi, Nakuru, Eldoret, Kisumu, and Nyeri regions of Kenya. These regions comprise the key markets in major urban centers. The five selected commodities comprise the major staple foods in Kenya<sup>7</sup>.

Data assistants, some of whom were traders, collected average daily wholesale and retail prices from the main markets of the selected regions. Data was collected daily for six days (Mondays to Saturdays) from stockists/wholesalers and traders in the morning hours.

During the last week of the month, the following qualitative data were captured:

- General observations on food prices during the month, including price variations and the lowest, highest, and prevailing wholesale and retail prices
- The source of food commodities and their availability throughout the month
- The effects of the COVID-19 pandemic, as well as government restrictions including curfews and cessation of movement, on food prices and availability (both supply and demand)
- Traders' adaptation strategies to the COVID-19 pandemic, including sourcing and selling

Additional secondary data was obtained from the Ministry of Agriculture, Kenya Government Food Security War Room (FSWR), Ministry of Agriculture Livestock and Fisheries (MoALF), and Regional Agriculture Trade Intelligence Network (RATIN).

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<sup>7</sup> NB: While the report covers wheat, consumption of that commodity in Kenya is comprised mainly of wheat products (flours, pastries, and highly processed foods) rather than raw wheat itself.

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