



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

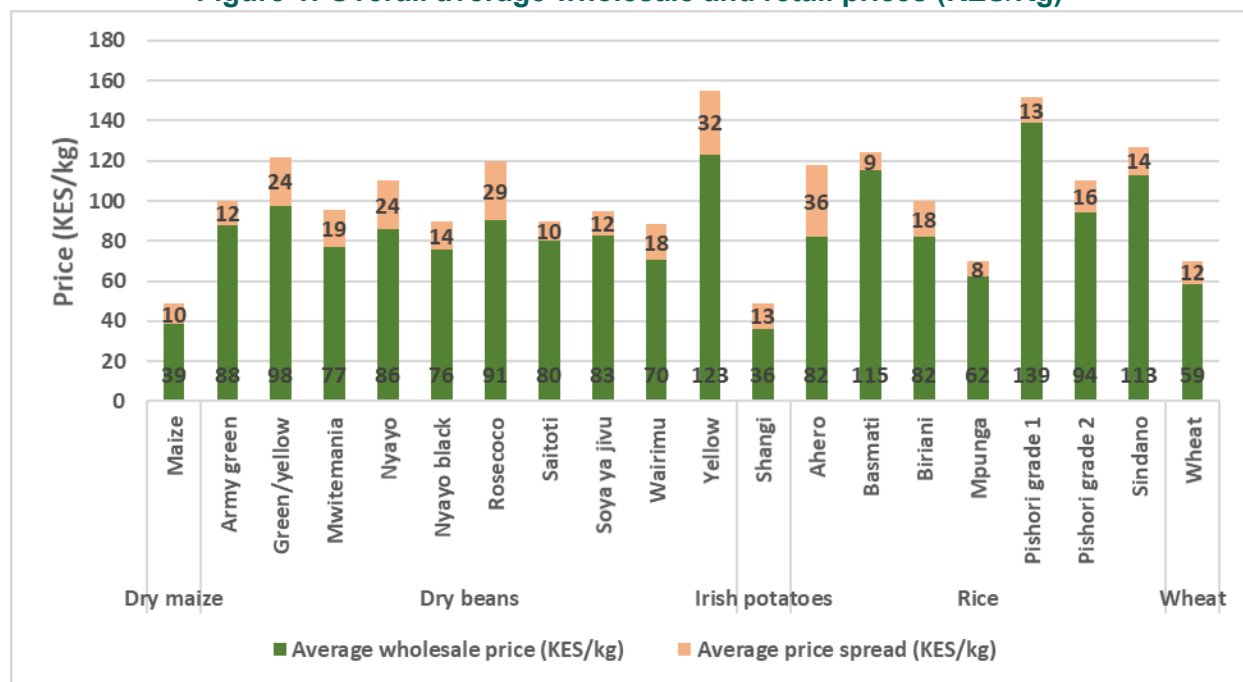
- ▶ Most commodity prices for March were significantly higher in all selected regions due to a combination of factors including perishability of crops, seasonality, high import costs, high demand, high transport costs occasioned by increased fuel prices, repackaging costs, and the involvement of middlemen and produce brokers.
- ▶ Atypically higher wheat prices in non-producing and populous regions is greatly attributable to market levies, higher demand, global shortages, and high import costs occasioned by depreciation of the Kenyan shilling against the U.S. dollar. These dynamics were worsened by the ongoing military unrest between Ukraine and Russia, both major wheat exporters.
- ▶ Green/yellow, Mwitmania, and Wairimu beans showed significantly higher wholesale and retail prices in Eldoret and Nairobi due to seasonality, location, and bean varieties.
- ▶ Increased Irish potato prices in the populous cities of Nairobi, Kisumu, and Mombasa can be attributed to high demand and unavailability of the commodity due to its perishability.
- ▶ High rice prices in the populous cities of Nairobi, Mombasa, Nakuru, and Eldoret could be due to these areas' reliance on imports and associated high import costs, high transaction costs, and high demand.

## Overall Wholesale and Retail Prices for February

Average wholesale and retail prices for maize, beans, potatoes, rice, and wheat in major Kenyan markets in March are shown in Figure 1. Most commodities recorded lower price margins of between 10% and 18%; these included some dry bean varieties (Army green (13%), Nyayo black (19%), Saitoti (13%), and Soya ya Jivu (14%)) and most rice varieties (Basmati (8%), Mpunga (13%), Pishori grade 1 (9%), Pishori grade 2 (17%), and Sindano (12%)). Some

commodities showed price margins of between 20% and 28%, including some dry bean varieties (green/yellow (25%), Mwitmania (24%), Nyayo (28%), Wairimu (26%), and yellow beans (26%)), maize (25%), Biriani rice (22%), and dry wheat (20%). A few commodities recorded higher price margins of between 32% and 45%, specifically Rosecoco beans (32%), Shangi Irish potatoes (36%), and Ahero rice (43%). The observed variations in wholesale and retail price margins can be attributed to a combination of factors, including perishability of the crop, seasonality, transport costs, repackaging costs, and the existence of middlemen and produce brokers.

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



Source: Daily Market Survey for the month of March

## Wholesale and Retail Commodity Prices

Several varieties of dry beans were recorded across regions, but only green/yellow and Wairimu beans were common in all the selected regions. Rosecoco beans were found in all regions with the exception of the Mombasa region (Table 1). Some dry bean varieties were only found in specific regions. For instance, Nyayo black, Saitoti, and Soya ya Jivu were found in Mombasa, yellow beans were found in Eldoret, and Army green beans were available in Mombasa, Nairobi and Nakuru. Compared to the national wholesale average prices, green/yellow, Mwitemania, and Wairimu beans showed higher wholesale prices. Eldoret and Nairobi regions recorded higher wholesale prices for most bean varieties, while Nairobi recorded higher retail prices for all bean varieties with the exception of Rosecoco beans. However, most dry beans recorded lower wholesale prices compared to the government recommended price of 93KES/kg. The observed variation in prices can be attributed to seasonality, location, and variety of beans.

Dry maize recorded higher wholesale prices in Eldoret and Nairobi and higher retail prices in Eldoret, Kisumu, and Nairobi compared to the national average wholesale and

retail prices of 39KES/kg and 49KES/kg, respectively. Wholesale prices in Eldoret and Nairobi were 47KES/kg, and 42KES/kg, while retail prices were 56KES/kg in Eldoret, 53KES/kg in Kisumu, and 50KES/kg in Nairobi. The higher prices in these regions are attributable to seasonality, market levies, transport costs, and disruptions in the supply chain. The rise in prices is also attributed to shortages coupled with a recently introduced market cess<sup>1</sup> on grains delivered to Nairobi (Kenyan Wall Street Newsletter, April 2022). Farm products that are taxed at delivery points include maize, wheat, rice, sorghum, millet, oats, and barley. The levy, which affects cereal millers in Nairobi, Mombasa, Machakos, Mwingi, Kitui, Nairobi, Thika, Nakuru, Uasin Gishu, Kitale, and Kisumu, amongst other regions, will adversely affect farmers and eventually impact consumers who are already battling high input and food costs.

Irish potatoes recorded higher prices in Mombasa (37KES/kg) and Nairobi (61KES/kg) compared to the national average wholesale price of 36KES/kg. Similarly, Kisumu and Nairobi showed significantly higher retail prices of 67KES/kg and 73KES/kg, respectively, compared to the national average price of 49KES/kg. Increased prices in the populous cities can be attributed to high demand and

<sup>1</sup> A levy charged by the Kenya Revenue Authority (KRA) on cereal deliveries made in Nairobi and all the large-scale millers based in branches in other cities within the country. The levy took effect on March 11, 2022.

unavailability of the commodity due to the crop's perishability.

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

Product	Variety	Average wholesale price (KES/kg)						Average retail price (KES/kg)						Total average whole sale price (KES/kg)	Total average retail price (KES/kg)
		Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri		
Dry beans	Army green			97	82	85				101	112	87		88	100
	Green/yellow	131	94	97	103	83	78	148	140	101	126	88	128	98	122
	Mwiternia			83	87	64	74			90	120	72	100	77	96
	Nyayo		93	77	88				120	90	120			86	110
	Nyayo black			76						90				76	90
	Rosecoco	113	85		89	81	86	131	130		120	87	130	91	120
	Saitofi			80						90				80	90
	Soya yajivu			83						95				83	95
	Wairimu	78	72	69	71	63	69	85	110	80	100	65	92	70	89
Yellow	123						155						123	155	
Dry maize	Maize	47	39	33	42	35	37	56	53	40	50	48	45	39	49
Irish potatoes	Shangi	24	33	37	61	28	33	29	67	43	73	40	42	36	49
	Ahero		82						118					82	118
Rice	Basmati	119		110		112	120	126		120		120	130	115	124
	Biriani			82						100				82	100
	Mpunga			62						70				62	70
	Pishori grade 1	153		145	150	117	129	172		150	170	123	144	139	152
	Pishori grade 2	98	97			88		109	130			92		94	111
	Sindano	129		106		118	100	138		120		130	120	113	127
Dry wheat	Wheat	62	75	55	60	49	51	76	83	60	80	53	70	59	70

Source: Daily Market Survey for the month of March

Pishori rice was common to all regions and Ahero rice was found in the Kisumu region, whereas Biriani and Mpunga rice were found in the Mombasa region. Sindano and Basmati rice (both non-aromatic rice) were available to the Eldoret, Mombasa, Nakuru, and Nyeri regions. Eldoret, Mombasa, and Nairobi recorded higher wholesale prices for Pishori grade 1 rice varieties, while Eldoret and Nairobi recorded significantly higher retail prices compared to the

national average wholesale and retail prices of 139KES/kg and 152KES/kg, respectively. High rice prices in the populous cities can be attributed to high import costs in these areas, which rely on imported rice. Imported rice comprises 89% of the rice consumed in the country (The Star Business, 2022).

Dry wheat recorded high wholesale prices in Eldoret (62KES/kg), Kisumu (75KES/kg), and Nairobi (60KES/kg) regions compared to the national average wholesale price of 59KES/kg. Similarly, the same regions showed significantly higher retail prices of 76KES/kg, 83KES/kg, and 80KES/kg, respectively, compared to the national average retail price of 70KES/kg. High wheat prices in non-producing and populous regions is attributable to the market cess which took effect in March 2022, as well as global shortages and dependence on imports. All these factors are worsened by the ongoing military unrest between Ukraine and Russia, both major wheat exporters. Kenya produces only 10% of the total wheat consumed in the country (Metropol Newsletter, 2022) and relies heavily on wheat imports from the Russian Federation, Ukraine, and the rest of the world. In view of the volume of wheat demand and over-reliance on imports from Russia and Ukraine, Kenya (as well as other African counties) is likely to be more severely affected by the fallout of the ongoing conflict through increased prices of wheat-based products or indirectly affected consumption of substitute products, resulting into increase in prices of other cereals (Relief Web, 2022).

## Wholesale and Retail Price Trends by Region

Variances in weekly prices were seen across regions between week 1 and weeks 2 through 5. Eldoret recorded mixed results, with different commodities seeing increased, reduced, and stable prices. Most dry bean varieties recorded significant increase of between 32% and 86% in both wholesale and retail prices across the weeks for all varieties with the exception of Wairimu beans, which displayed stable wholesale and retail prices. Dry maize saw a reduction of wholesale and retail prices (17% and 8%, respectively) when week 1 prices were compared to week 5. The decline in maize prices can be attributed to availability of imports from neighboring East African countries. Irish potatoes saw a reduction of wholesale and retail prices up to week 4 and increased wholesale and retail prices of 12% and 10%, respectively, when week 5 and week 1 were compared. These increases could be attributable to seasonality and high demand. Most rice varieties saw increased wholesale (between 8% and 13%) and retail (between 8% and 29%) prices with the exception of Sindano rice, which recorded a decline of 12% and 13% in wholesale and retail prices, respectively. Wheat prices saw significant increases in wholesale (36%) and retail (14%) prices. Although Eldoret region is a wheat surplus region, high demand, seasonality, and high international prices can be behind for the high observed wheat prices in the region.

Kisumu recorded similar mixed results, with most commodities seeing increased prices, and stable prices, with a few exhibiting lower prices. A comparison of wholesale prices between week 5 and week 1 showed slight increase in prices for some dry beans (green/yellow beans and Rosecoco, both at 7%), while others (Nyayo and Wairimu beans) saw stable prices. Dry maize, Shangi Irish

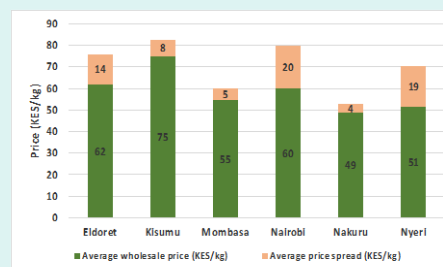
## FOCUS ON WHEAT ACROSS SELECTED REGIONS

Wheat is the second most important cereal in Kenya after maize and contributes substantially to food security, poverty reduction, and employment creation. The national demand for wheat and wheat products is on the increase, partly due to the high population growth, increased urbanization, and related changing trends in food consumption patterns.

Narok County is the leading wheat producer, followed by Laikipia County. Other wheat growing counties include Nakuru, Uasin Gishu, Nyandarua, Meru, Trans Nzoia, and Elgeyo Marakwet. Smaller quantities are also produced in Nyeri (Mweiga) and Kajiado Counties. Given that the demand for the cereal is increasing at a rate faster as compared to domestic production, Kenya depends on wheat imports to plug the gap between supply and demand.

During March, wheat recorded atypically higher prices across regions (Figure 2). Wholesale prices averaged 59 KES/kg, while retail prices averaged 70KES/kg. Wheat is amongst the farm products subjected to the new market levy taxed at delivery points. Higher prices are attributable to market levies, higher demand, global shortages, and high import costs occasioned by depreciation of the Kenyan shilling against the U.S. dollar. These findings concur with data from Agriculture and Food Authority, which finds that 90% of wheat consumed in the country is imported, from mainly Russia and Ukraine (Star Farmer Magazine, 2022). Kenya imports 67% of its wheat from the Russian Federation, 22% from Ukraine, and 11% from the rest of the world. Consequently, the increase in international prices due to instability occasioned by Russia and Ukraine war coupled with increased fuel prices will certainly have an effect on consumer prices.

**Figure 1: Average Wholesale and Retail prices of wheat (KES/kg) in selected regions**



Source: Daily Market Survey for the month of March.

potatoes, Pishori grade 2 rice, and dry wheat saw increased wholesale prices of 3%, 24%, 2% and 5%, respectively.

Price reductions were observed for Ahero rice (11%). All dry beans and Pishori grade 2 saw stable retail prices while increased prices were recorded for dry maize (8%), Shangi Irish potatoes (47%), Ahero rice (7%), and dry wheat (23%).

A comparison of wholesale prices between week 5 and week 1 in Mombasa showed stable prices for most commodities, including dry beans (Nyayo black, Saitoti, and Wairimu beans), dry maize, all rice varieties, and wheat. Slight increases in prices of between 1% and 10% were recorded for most beans varieties, with exception of Soya ya Jivu beans, which showed a significant increase of 31%. Most commodities saw stable retail prices, with a few dry beans seeing slight increases and Shangi Irish potatoes seeing a decline of 15%.

Both a slight increase and stable wholesale and retail prices were observed in the Nairobi region for most commodities. A comparison of wholesale prices between week 5 and week 1 showed stable prices for all commodities with the exception of Army green beans, green/yellow beans, and Irish potatoes, which saw increases of 20%, 8%, and 11%, respectively.

Nakuru recorded mixed results with different commodities seeing increased, reduced, and stable prices. A comparison of wholesale prices between week 5 and week 1 showed a slight increase in prices for green/yellow beans (7%), Rosecoco (2%), Wairimu beans (18%), Shangi Irish potatoes (10%), Pishori grade 1 rice (8%), and Pishori grade 2 rice

(10%). Notable was the significant increase in the price of wheat (39%). Slight price reductions were observed for dry maize (4%), and Sindano rice (8%). Stable wholesale prices was recorded for Mwitmania beans and Basmati rice.

Mixed results were also recorded in Nyeri. A comparison of retail prices between week 5 and week 1 showed increase in the price of green/yellow beans (8%), dry maize (26%), Shangi Irish potatoes (9%) and Pishori grade 1 rice. A slight increase in dry maize prices (5%) was also recorded. Food commodities that saw stable prices included Basmati rice and Sindano rice. Slight price reductions were recorded for wheat (3%).

## **Comparison of National Average Prices between February and March 2022**

A comparison of overall prices (national averages for all commodities) for February and March 2022 (Table 2) shows generally stable wholesale and retail prices for most commodities, with price changes between 3% and -2%. Some commodities saw slight (between 5% and 10%) and moderate (greater than 11%) increases in wholesale and retail prices. These included green/yellow beans, Rosecoco beans, Soya ya jivu beans, yellow beans, and wheat. Stable wholesale and retail prices between February and March can be attributable to imports from neighboring countries.

**Table 2: Comparison of February and March 2022 prices**

Product	Variety	Average Wholesale Price (Kes/Kg)		Percentage change	Average Retail Price (Kes/ Kg)		Percentage change
		February	March		February	March	
Dry maize	Maize	39	39	0%	48	49	1%
Dry beans	Army green	86	88	2%	100	100	0%
	Green/yellow	87	98	11%	111	122	9%
	Mwitmania	77	77	0%	96	96	0%
	Nyayo	85	86	1%	110	110	0%
	Nyayo black	76	76	-1%	90	90	0%
	Rosecoco	85	91	6%	113	120	5%
	Saitoti	80	80	0%	90	90	0%
	Soya ya jivu	69	83	17%	80	95	15%
	Wairimu	70	70	1%	88	89	1%
Irish potatoes	Yellow	89	123	28%	100	155	36%
	Shangi	35	36	3%	49	49	0%
Rice	Ahero	90	82	-10%	108	118	8%
	Basmati	114	115	1%	123	124	1%
	Biriani	82	82	0%	100	100	0%
	Mpunga	62	62	0%	70	70	0%
	Pishori grade 1	134	139	3%	145	152	5%
	Pishori grade 2	93	94	1%	108	111	2%
	Sindano	117	113	-3%	130	127	-2%
Wheat	Wheat	55	59	6%	67	70	5%

Key	
<3 but >-2	Stable
>-3 but <-10	Slight Decrease
>5 but <10	Slight Increase
>11	Increase

Source: Daily Market Survey for the month February and March

## Outlook for the Month of April

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

- Delayed short rains and predicted poor long rains, coupled with skyrocketing prices of fertilizer and maize seeds, could negatively impact production of food commodities and lead to scarcity. These factors, in addition to climatic variability and other unforeseen factors, could result in high food prices.
- Prices of selected food commodities, specifically maize, wheat, and rice, are likely to increase further in the coming months due to the newly introduced market levy at delivery points in major Kenyan cities and towns. This will raise the prices of food commodities even higher.
- Instability occasioned by the conflict in Russia and Ukraine, together with increased fuel prices, will lead to increased cost of food production, consequently pushing food commodity prices up, specifically imports including wheat and rice. This will possibly affect the consumption of substitute products, occasioning an increase in prices of other cereals as well.
- Due to Kenya's reliance on imports, prices of imported food commodities, including wheat and rice, are expected to increase due to the effects of the performance of the Kenyan shilling against the U.S. dollar in the foreign exchange market, as well as the continued depreciation in the shilling.
- Increased political activity ahead of the August elections in Kenya might affect business performance including acquisition of inputs and food importation as investors adopt a wait-and-see approach to investments.

## FOCUS ON NAIROBI REGION

Nairobi is the capital and largest city of Kenya. Food consumed in the city comes from across the country and from imports from neighboring East African countries and from other regional and international producers. Prices for target crops were collected from Nyamakima and Wakulima (Marikiti) wholesale markets, the largest cereal and fresh produce markets in Nairobi, respectively.

Beans in Nairobi were sourced from Meru, Narok, and Taita Taveta and imported from Busia in Uganda and Namanga in Tanzania, while maize was imported from Uganda and Tanzania. Rice was sourced from Kirinyaga County (Mwea irrigation scheme), and Mombasa and imported from Tanzania. Some varieties of rice were also imported from Asia (India, Pakistan, and Vietnam), while wheat was sourced from Narok, and Taita-Taveta1 Counties, as well as imported.

Price data for Irish potatoes was collected from Marikiti wholesale market, the region's biggest fresh produce market. Due to the seasonality and scarcity of Irish potatoes, the produce were sourced particularly from Kipipiri in Nyandarua County.

During March, all commodities showed increased or stable wholesale and retail prices between weeks 5 and 1. For wholesale prices, a comparison between week 1 and week 5 saw increased prices for Army green beans (20%), green/yellow beans (8%), and Irish potatoes (11%). Stable prices were recorded for other dry bean varieties, dry maize, rice, and dry wheat. Commodity prices in the populous city characterized as atypically deficit region are attributable to a combination of factors: seasonality, high import costs, high transport and transaction costs resulting from increased fuel prices, involvement of many middlemen, and higher demand for the commodities.

**Table 3: Average Retail and Wholesale Prices, Nairobi Region**

Product	Variety	Average of wholesale price per kg					Total average wholesale (KES/kg)	Total average retail price (KES/kg)
		Week 1	Week 2	Week 3	Week 4	Week 5		
Dry beans	Army green	80	80	83	83	87	82	112
	Green/yellow	100	102	106	103	106	103	126
	Mwitimania	87	87	87	87	88	87	120
	Miyago	87	87	89	89	89	88	120
	Rusocooco	89	89	89	87	91	89	120
	Wairimu	71	70	70	72	72	71	100
Dry maize	Maize	42	42	42	42	42	42	50
Irish potatoes	Shangi	60	60	60	63	65	61	73
Rice	Pishwi grade 1	150	150	150	150	150	150	170
Wheat	Wheat	60	60	60	60	60	60	80

Source: Daily Market Survey for the month of March.

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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>2</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>2</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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