



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

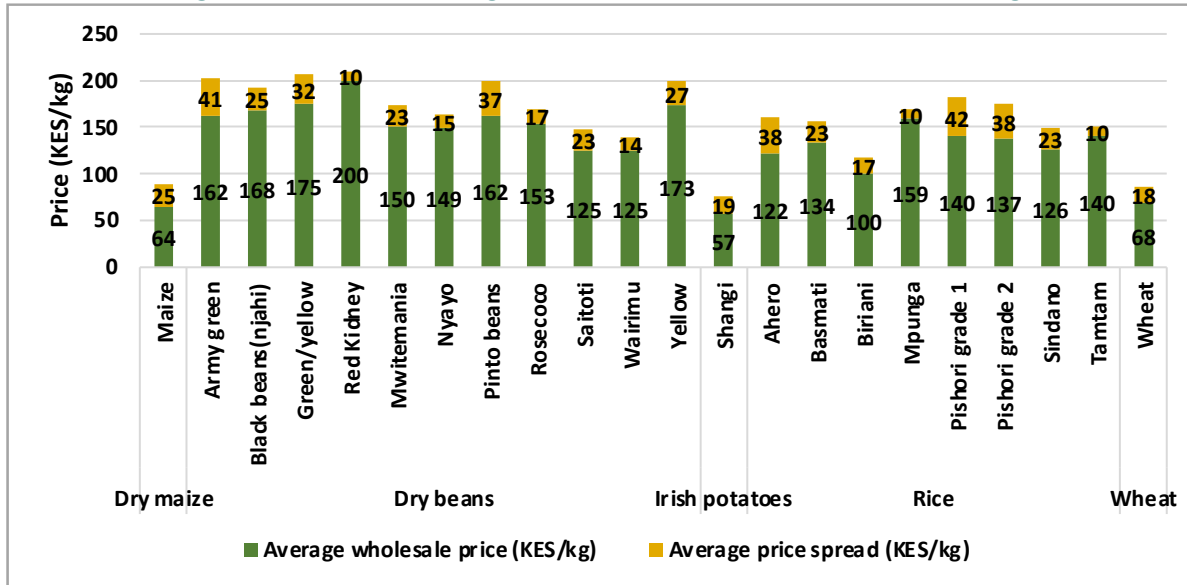
- ▶ Differences in wholesale and retail pricing margins can be attributed to a variety of factors, including production location, transportation costs, repackaging costs, seasonality, and the existence of middlemen and produce brokers.
- ▶ Dry maize had a much greater price margin attributable to short supply, high demand, and scarcity of the commodity due to irregular rainfall, high input costs, particularly fertilizer, and high fuel prices, low output.
- ▶ Stable or declining prices in most regions is as a result of seasonal availability of food items in major producing area and neighboring regions.

Overall Wholesale and Retail Prices for February

Average wholesale and retail prices for the selected food commodities in major Kenyan markets in February are shown in **Error! Reference source not found.** Most commodities recorded lower price margins of between 3% and 15%; these included most dry beans varieties [Black beans (15%), Red Kidney (5%), Mwitmania (15%), Nyayo (10%), Rosecoco (11), and Wairimu beans (11%)] and some rice varieties [including Mpunga (6%), and Tamtam (7%)]. Commodities which showed price margins of between 16% and 25%, comprised Army green beans (25%), Green/yellow beans (18%), Pinto beans (23%),

Saitoti beans (18%), yellow beans (16%), Basmati rice (17%), Biriani rice (17%) and Sindano rice (18%). Commodities which recorded significantly higher price margins of between 26% and 33% included Shanghi Irish potatoes (33%), Ahero rice (31%), Pishori grade 1 rice (30%), Pishori grade 2 rice (28%), and dry wheat (26%). Dry maize saw significantly higher price margin of 39%, attributable to low supply due to erratic rains, high input cost specifically fertilizer and high fuel prices. Variations in wholesale and retail pricing margins can be related to a number of variables, including the source of production, transportation expenses, repackaging costs, seasonality, and the presence of intermediaries and produce brokers.

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



Source: Daily Market Survey for the month of February 2023

Wholesale and Retail Commodity Prices

Various dry bean types were identified across regions, but only green/yellow and Wairimu beans were found in all of the regions studied. (Table 1). Rosecoco bean varieties were widespread in all regions except Mombasa, Black beans (Njahi) and Mwitmania were common in all regions except Kisumu, and Nyayo was common in all regions except Nyeri. Certain bean kinds were only seen in certain places during February, for example, red kidney and yellow beans in Eldoret, and Saitoti beans in Mombasa. As predicted, all bean varieties had higher retail pricing than wholesale prices. Black beans (Njahi) recorded higher retail prices in Eldoret (235KES/kg) and Nyeri (202 KES/kg) compared to the national average retail price of 193 KES/kg. Green yellow beans showed higher wholesale prices in Kisumu, Mombasa, Nairobi, and Nyeri regions compared to the national average wholesale price of 175 KES/kg and higher retail prices in Kisumu, Nairobi and Nyeri regions compared to the national average retail price of 207 KES/kg. With the exception of Nyayo beans, which exhibited higher retail costs, all bean types accessible in Kisumu area had higher wholesale and retail prices compared to their respective national average prices. This is mostly because the region is characterized by marginal agricultural productivity. The Nakuru region showed lower wholesale and retail prices for all accessible bean kinds in the region when compared to national average costs, owing to the region's highly productive qualities. The observed price variance can be ascribed to seasonality,

transportation expenses, and supply chain interruptions. High wholesale and retail costs for green/yellow beans have been documented in most regions, owing to their increased demand as a consequence of their desired features, which include being easy to cook, tasty, and nutritious.

Dry maize had higher wholesale prices in Kisumu (68KES/kg), Mombasa (69 KES/kg), and Nairobi (68KES/kg) than the national average wholesale and retail prices of 64 KES/kg and 89KES/kg, respectively, and much higher retail prices in Kisumu (168KES/kg). High prices are attributable to prolonged drought, unpredictable precipitation, low output, high demand, and scarcity of maize.

Irish potatoes had higher retail costs in Nairobi (110KES/kg) and Kisumu (84KES/kg) than the national average of 74KES/kg. Moreover, Nairobi had a higher wholesale price of 100KES/kg than the national average wholesale price of 56KES/kg. Price increases in populated places can be attributable to strong demand and commodity scarcity owing to its perishable nature.

Pishori rice was found in all regions, with most regions recording grade 1, Kisumu recording grade 2, and Eldoret recording both grades. Except for Nakuru, all other areas had higher wholesale and retail prices for Pishori grade 1 rice than the national average wholesale (145KES/kg) and retail (183KES/kg). Various regions revealed different rice types, with Mombasa showing more rice varieties such like Biriani, Mpunga, Pishori, Sindano, and Tamtam rice than other locations. High rice prices can be linked to decreased

productivity owing to bad weather for cultivation, increased demand, transportation costs, and the presence of numerous intermediaries and producer brokers.

Dry wheat experienced higher wholesale prices in Kisumu (94 KES/kg), and Nakuru (72 KES/kg), as well as higher retail prices in Kisumu (98KES/kg), Nairobi (100 KES/kg), and Nyeri (123KES/kg) compared to the national average wholesale and retail prices of 70 KES/kg and 87 KES/kg, respectively. Wheat prices are higher in non-producing

regions and in populated cities due to reliance on wheat imports as demand for the commodity grows faster than domestic output. Drought, high input costs, and quelea bird infestations have all affected local wheat output, according to the Agricultural and Food Administration (AFA) (<https://allafrica.com/>). Kenya generates only 14% of local wheat consumption on average. This indicates that the country imports over two-thirds (86%) of its wheat requirements, notwithstanding the import tariff (KIPPR, 2022).

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

Product	Variety	Average wholesale price (KES/kg)						Average retail price (KES/kg)						Total average wholesale 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	173	184	188		140		200	235	193		170		171	200
	Black beans(njahi)	206		159	167	157	152	235		168	190	170	202	168	193
	Green/yellow	173	188	188	184	140	177	200	242	193	217	164	226	175	207
	Red kidney beans	200						210						200	210
	Mwitmania	217		175	143	100	135	250		180	170	109	182	150	173
	Nyayo	200	160	143	128	113		220	160	148	170	120		149	164
	Pinto beans	166	167				154	190	215				198	162	199
	Rosecoco	150	164		150	141	162	160	175		180	150	202	153	170
	Saitoti			125						148				125	148
	Wairimu	122	150	122	111	117	130	130	153	128	130	120	172	125	139
Yellow	173						200						173	200	
Dry maize	Maize	62	65	69	68	56	62	72	168	70	82	62	80	64	89
Irish potatoes	Shangi	49	48	61	98	39	49	59	78	75	110	78	56	57	76
Rice	Ahero		122						160					122	160
	Basmati	108			144	143	141	130			160	169	170	134	157
	Biriani			100	96	104				111	120	120		100	117
	Mpunga			159						169				159	169
	Pishori grade 1	175		175	160	98	168	200		180	180	170	188	140	182
	Pishori grade 2	128	147					150	200					137	175
	Sindano	122		143		122	120	130		150		160	147	126	149
	Tamtam			140						150				140	150
Wheat	Wheat	53	88	60	70	70	67	55	103	75	100	71	118	68	86

Source: Daily Market Survey for the month of February 2023

Wholesale and Retail Price Trends by Region

Weekly pricing differences were seen among areas between week 1 and weeks 2 through 5. At Eldoret, all commodities exhibited constant wholesale and retail prices, except for dry maize and Irish potatoes, which declined. Prices are stable or declining as a result of seasonal availability of food items in the region and neighboring regions.

When week 1 prices were compared to week 5, commodities in Kisumu exhibited a combination of steady, decreased, and increasing prices. The wholesale price of most dry beans remained steady or decreased, with the exception of green yellow beans, which showed a 1% increase. Maize had a 6% increase in retail prices and a 1% decrease in wholesale prices. Irish potatoes showed increases in wholesale (16%) and retail (7%) prices, whereas rice in the region had constant retail prices. Both wholesale (14%) and retail (1%) prices for dry wheat dropped. The supply of food items within the region and in neighboring counties is responsible for price reductions and stability. High prices for maize and Irish potatoes are due to a lower-than-average crop in the producing regions, strong demand, the presence of intermediaries, and transaction and transportation costs.

Most commodities experienced increases in wholesale and retail prices in the Mombasa region. A comparison of wholesale and retail pricing for most dry beans, including black beans (Njahi), green/yellow, Nyayo, and Wairimu, between weeks 5 and 1 recorded price increases. Dry maize had a 6% increase in wholesale prices and a 3% increase in retail prices, whilst Irish potatoes witnessed a 4% and 3% decrease in wholesale and retail prices, respectively. Rice types available in the region had wholesale price increases ranging from 1% to 5%, with most varieties maintaining steady pricing. Wheat prices were constant at both the wholesale and retail levels. Food commodity prices have risen due to low supply due to higher production costs, particularly fertilizers and fuel, inconsistent precipitation in major producing areas, and high demand.

Most food staples were priced consistently in the Nairobi region. Retail prices for most commodities were steady between week five and week one, except for maize, which saw a 13% price increase and Irish potatoes, which fell by 7%. Nairobi is a non-producing populous city with high food demand; this, along with below-average agricultural output due to insufficient rainfall, is causing price increases.

A comparison of wholesale and retail pricing in Nakuru between week five and week one revealed a mix of stable, decreasing, and increasing food commodity prices. Retail

FOCUS ON RICE ACROSS SELECTED REGIONS

After maize and wheat, rice is the third most significant cereal crop in Kenya. Small-scale farmers mostly grow it in the Central (Mwea), Western (Bunyala), Coast (Tana delta, Msambweni), and Nyanza regions (Ahero, West Kano, Migori and Kuria). Due to its adaptability to all production ecologies, rice is grown in several counties including: Kirinyaga, Kisumu, Homa Bay, Migori, Meru, Embu, Tharaka Nithi, Isiolo, Marsabit, Busia, Kakamega, Bungoma, Turkana, Garissa, Elgeyo Marakwet, West Pokot, Baringo, Taita Taveta, Kilifi, Kwale, Tana River, Lamu, Siaya and Murang'a.

It takes three to four months for the commodity to be fully ready for harvest. The primary harvest season in Mwea's major producing region is November, while the ratoon harvest season is August. Irrigation systems generate over 100% of Kenya's rice, with the Mwea project accounting for more than 80% of total output, while lesser irrigated rice schemes are located in Bura, Ahero, and Bundalangi. Kenyan rice is classified into three types: long-grain Sindano rice, medium-grain rice, and aromatic basmati rice (Pishori is the most expensive brand of rice sold in Kenya commonly grown in the Mwea irrigation scheme and its extension areas). Despite being the third most consumed staple, the country is unable to fulfill its own need; it generates less than 20% of its own consumption, necessitating imports. Pakistan, Tanzania, India, Thailand, and Italy were the top rice exporters to Kenya in 2021. (USDA, 2022).

Several rice varieties are traded across areas; typically traded rice varieties include Pishori, Basmati, and Sindano. Major sources of rice traded in various regions were sources from Mwea irrigation scheme (Pishori grade 2, and Basmati), Tanzania (Pishori grade 1, Mpunga, and Sindano), Pakistan (Basmati, Biriani, Sindano and TamTam), and Ahero irrigation scheme (Ahero).

Pishori grade 1, Basmati, and Sindano rice had higher average retail and wholesale prices in most regions in February. High rice prices in Nairobi, Mombasa, and Kisumu may be due to these cities' reliance on imports, resulting in high import costs, high transaction costs, and high demand. The government, on the other hand, intends to import the grains in the short term while simultaneously striving to improve local food production in the following months. <https://ntvkenya.co.ke/news/>

Figure 1: Average wholesale and retail prices of rice (KES/kg) in selected regions

Variety	Average w/sale price (KES/kg)										Total average w/sale price (KES/kg)	Total average retail price (KES/kg)		
	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi			Nakuru	Nyeri
Armani		122											122	160
Basmati	108			144	143	141	130	160					134	157
Biriani		100	96	104					111	120	120		100	117
Mpunga			139						149				155	169
Pishori grade 2	175		175	160	98	168	200		180	180	170	188	140	182
Pishori grade 1	138	147					150	200					137	175
Sindano	122		143		122	120	130			150	140	147	126	149
TamTam			140						150				140	150

Source: Daily Market Survey for the month of February 2023.

prices for some dry beans were stable, including Army green, black beans (Njahi), and Rosecoco, while others increased, including Green/yellow (6%), Mwitmania (25%), and Wairimu (4%). Dry maize prices increased by 7%, but Irish potatoes remained constant. In Nakuru, available rice types registered steady and reduced prices, while dry wheat recorded stable prices.

A comparison of wholesale and retail pricing in the Nyeri region between week 5 and week 1 revealed a little rise and

steady prices for most goods. Green/yellow (6%), maize (5%), Irish potatoes (6%), and Pishori grade 1 rice (6%), were among the goods that showed a small increase in wholesale prices. Basmati rice prices remained constant, but wheat prices dropped by 2%.

Comparison of National Average Prices between January and February

A comparison of overall prices (national averages for all commodities) for January and February 2023 (see Table 2)

reveals steady wholesale and retail prices for most commodities, a slight increase and increase for a few commodities, and a decline for the Black beans (Njahi) variety. Most commodities experienced constant retail and wholesale prices (between 3% and -4%) and a 3% to 10% rise. The stability of wholesale and retail prices for most commodities between January and February is due to a surplus of goods from various producing regions, as well as imports from neighboring East African nations Uganda and Tanzania, as well as Asia (India, Pakistan, and Vietnam).

Table 2: Comparison of January and February prices

Product	Variety	Average Wholesale Price (Kes/Kg)			Average Retail Price (Kes/Kg)		
		Jan. 2023	Feb.2023	Percentage change	Jan. 2023	Feb.2023	Percentage change
Dry beans	Army green	134	162	17%	176	203	13%
	Black beans (njahi)	181	168	-8%	206	193	-7%
	Green/yellow	160	175	9%	191	207	8%
	Kidney beans	200	200	0%	210	210	0%
	Mwitmania	131	150	13%	147	173	15%
	Nyayo	128	149	14%	149	164	9%
	Pinto beans	166	162	-2%	190	199	5%
	Rosecoco	143	153	7%	164	170	4%
	Saitoti	125	125	0%	130	148	12%
	Wairimu	110	125	12%	132	139	5%
Yellow	173	173	0%	200	200	0%	
Dry maize	Maize	63	64	2%	87	89	2%
Irish potatoes	Shangi	56	57	2%	74	76	3%
Rice	Ahero	121	122	1%	160	160	0%
	Basmati	135	134	-1%	156	157	1%
	Biriani	100	100	0%	120	117	-3%
	Mpunga	150	159	6%	160	169	5%
	Pishori grade 1	145	140	-4%	183	182	-1%
	Pishori grade 2	138	137	-1%	176	175	-1%
	Sindano	125	126	1%	146	149	2%
	Tamtam	136	140	3%	150	150	0%
Wheat	Wheat	70	68	-3%	87	86	-1%

Key	
>-4 but <-10	Decrease
<3 but >-4	Stable
>3 but < 10	Slight increase
>10 but < 20	Increase

Source: Daily Market Survey for the month February 2023

FOCUS ON NAIROBI REGION

Nairobi is Kenya's capital and largest city. The county is totally urban and is the third smallest but most populated of the 47 counties. Food in the city is sourced from all around the country, as well as imports from neighboring East African nations and other regional and worldwide producers. Pricing for target crops were obtained from the Nyamakima and Wakulima (Marikiti) wholesale markets, which are Nairobi's major grain and fresh produce marketplaces, respectively. Nyamakima market is open from 6 a.m. until 5:30 p.m, every day of the week.

Beans came from Meru, Narok, and Taita Taveta, as well as imports from Busia, Uganda, and Namanga, Tanzania, while maize came from Kitale, Nakuru, Namanga, Narok and Busia Uganda. Rice was obtained from Kirinyaga County (Mwea irrigation plan), Mombasa, and Tanzanian imports. Several rice types were imported from Asia (India, Pakistan, and Vietnam), while wheat was derived from Narok, Taita-Taveta1, and imports. Prices for Irish potatoes were obtained from the Marikiti wholesale market, the region's largest fresh produce market, which is open from 3-5 a.m. for wholesalers and all day for merchants. Farmers, wholesalers, brokers, retailers, vendors, handcart pushers, and those who carry luggage on their backs or shoulders to various bus stations are among the traders who use the market. Owing to the seasonality and unavailability of Irish potatoes, the crop was mostly acquired from Kinangop in Nyahururu County and Kipipiri in Nyandarua County.

Between the fifth and first weeks of February, most commodities exhibited constant wholesale and retail prices, while a few witnessed increases and decreases. In terms of wholesale pricing, green yellow beans (5%), maize (7%), and Biriani rice (11%) increased in price between week 1 and week 5. Prices for most dry bean types and Pishori rice were stable, but prices for Mwitemia beans (3%), Irish potatoes (13%), and wheat (7%) declined. Commodity prices in the populous city, which is classified as a typically deficit region, are influenced by a number of factors, including seasonality and scarcity, high import costs, high transport and transaction costs due to increased fuel prices, the involvement of numerous middlemen, and higher demand for the commodities.

Table 3: Average Retail and Wholesale Prices, Nairobi Region

Product	Variety	Average wholesale price (KES/kg)					Total Average wholesale price (KES/kg)	Total Average retail price (KES/kg)
		Week 1	Week 2	Week 3	Week 4	Week 5		
Dry beans	Black beans(njahi)	167	167	167	167	167	167	190
	Green/yellow	178	183	186	187	187	184	217
	Mwitemia	144	144	144	140	139	143	170
	Nyayo	128	128	128	128	128	128	170
	Rosecoco	150	150	150	150	150	150	180
	Wairimu	111	111	111	111	111	111	130
Dry maize	Maize	67	67	67	69	72	68	82
Irish potatoes	Shangi	103	102	96	95	90	98	110
Rice	Basmati	142	144	144	144	144	144	160
	Biriani	94	94	94	99	100	96	120
Wheat	Pishori grade 1	160	160	160	160	160	160	180
	Wheat	70	70	70	70	65	70	100

Source: Daily Market Survey for the month of February 2023.

Outlook for the Month of March

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

- If the drought continues into 2023, another below-average harvest is projected, resulting in scarcity, increased demand, and hence rising prices for most basic food items.
- With forecasted average to below-average precipitation during the March to May rainy season in 2023, staple food shortfalls would emerge, potentially rising staple food prices and lowering food availability.
- Maize, wheat, and rice prices are expected to fall in the coming months due to anticipated increased imports.

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.

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 Kenya¹.

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).

¹ 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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