



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

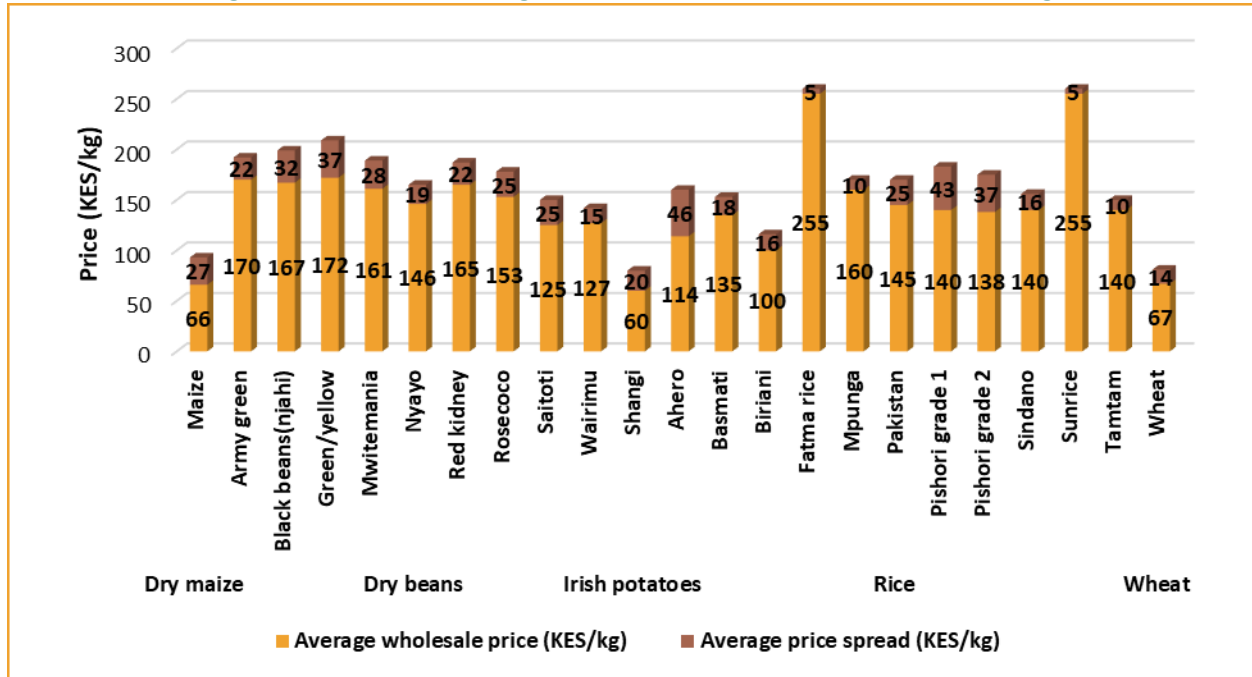
- ▶ Low production seasons brought on by prolonged droughts and high local demand can be blamed for the observed discrepancies in the pricing margins between wholesale and retail.
- ▶ Seasonality, transportation expenses, and supply chain interruptions are all potential causes of the observed price fluctuation for most food commodities.
- ▶ Higher maize prices observable in all regions are caused by low productivity brought on by prolonged droughts and high input costs, particularly for fertilizer, which inhibits smallholder farmers' capacity to raise yields and profitability.
- ▶ The Irish potato's scarcity due to its perishable nature, seasonality and high demand are the main factors driving up pricing in populous places of Nairobi, Kisumu, Mombasa and Nakuru
- ▶ Insufficient rainfall brought on by climate change, higher production costs, particularly for fertilizers and agrochemicals, and the weakening value of the Kenyan shilling against the US dollar have all contributed to higher prices for wheat and rice varieties, which have in turn increased prices worldwide.

Overall Wholesale and Retail Prices for March

The chart below (Figure 1) displays the typical wholesale and retail prices for maize, beans, potatoes, rice, and wheat in the main Kenyan marketplaces in March. Most commodities saw smaller price margins of 2% to 15%; various types of dry beans were among them: [Army green (13%), Nyayo (13%), Wairimu (12%), and most rice varieties including [Basmati (13%), Fatma (2%), Mpunga (6%), Sindano (11%), Sunrice (2%) and Tamtam rice (7%)]. Several commodities, including some dry bean varieties, such as [Black beans (19%), green/yellow (22%), Mwitmania (17%), Rosecoco (16%), and Saitoti (20%)]

and some rice varieties, such as [Biriani (16%), Saitoti (20%), and Pakistan rice (17%), showed price margins of between 16% and 25%. Wheat also saw a 21% price margin. A few commodities including Irish potatoes (33%), Pishori rice grade 1 (31%), and Pishori grade 2 (27%), had price margins of between 26% and 35%. Other commodities, like dry maize (41%) and Ahero rice (40%), had slightly greater price margins of between 33% and 40%. The observed variations in the pricing margins between wholesale and retail can be ascribed to below-average production seasons resulting from prolonged dry season, and high local demand.

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



Source: Daily Market Survey for the month of March 2023

Wholesale and Retail Commodity Prices

There were many different types of dry beans found in different places, although Army green, Black beans (Njahi), and Wairimu beans were prevalent in all the chosen regions (Table 1). Other common beans by region included Rosecoco and green/yellow, which were present in all except the Mombasa region, and Nyayo beans, which were present in all but Nyeri. Some dry beans varieties were only found in specific regions, for example, Saitoti was only found in the Mombasa region, while red kidney is more prevalent in Eldoret, Kisumu, and Nairobi. Most bean types were found in the Eldoret and Nairobi areas, followed by Nakuru and Kisumu, while few were found in Mombasa. As anticipated, retail prices for all bean varieties were higher than wholesale prices. Compared to the national wholesale average prices, Army green saw higher wholesale and retail prices in most regions. Eldoret, Kisumu and Nyeri recorded higher retail prices for most bean varieties while Nakuru and Mombasa saw lower wholesale prices for all bean varieties. The observed variation in prices can be attributed to seasonality, transport costs, and disruptions in the supply chain.

Dry maize had higher wholesale prices in Mombasa, Nairobi, and Nyeri, with prices of 70KES/kg for both Mombasa and Nairobi and 67KES/kg for the Nyeri area, compared to the national average wholesale and retail

prices of 66KES/kg and 93KES/kg. Because Kisumu is a sizable market situated in a deficiency area with low agricultural yield, the region there recorded an outrageously higher retail price of 174KES/kg.

When compared to the national average wholesale and retail costs of 60KES/kg and 80KES/kg, respectively, Irish potatoes were much more expensive at 96KES/kg and 108KES/kg in Nairobi. Most regions had higher retail prices as well, with Kisumu, Mombasa, and Nakuru recording the highest rates (87KES/kg, 81KES/kg, and 83KES/kg, respectively). High demand and the commodity's scarcity because of its perishable nature are the causes of rising prices in the populated cities.

All regions had Pishori rice in common, although Kisumu had Ahero and Pakistan rice and Mombasa had Tamtam, Fatma, Sunrice and Mpunga rice. Except for Kisumu and Mombasa, all regions have access to basmati rice (nonaromatic rice). For Pishori grade 1 rice types, all regions except Nakuru saw increased wholesale prices. Climate change and production costs are to blame for the high price of rice. This is a result of insufficient rainfall and expensive fertilizers and agrochemicals. Kenya, a net importer of cereals, is most likely to be impacted by the increase in grain prices resulting from inflation, which has kept the cost of these commodities high (The Star Newspaper, March 2023). The additional expense has been passed on to consumers by importers through increased commodities prices.

In comparison to the national average wholesale and retail prices of 67KES/kg and 81KES/kg, respectively, dry wheat prices were higher in the Kisumu, Nairobi, Nakuru, and Nyeri areas. Wheat shortages brought on by the Ukraine-Russia war disturbing the supply chain are mostly to blame for the high costs in populous and non-producing regions where demand is higher than supply.

According to Market Screener, March 2023 report, wheat prices are high because of the Ukraine crisis's interruptions and Kenya's declining currency rate.

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

Product	Variety	Average w/sale price (KES/kg)						Average retail price (KES/kg)						Total average w/sale price(KE S/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	180	156	161	178	200	223	185	170	179	225	170	192
	Black beans(njahi)	206	141	160	170	165	156	235	200	170	194	171	224	167	199
	Green/yellow	173	164		167	169	184	200	249		194	170	234	172	209
	Mwitmania	217			140	133	153	251			170	138	194	161	189
	Nyayo	200	134	150	128	120		220	160	155	170	122		146	165
	Red kidney	200	140		144			210	200		170	160		165	187
	Rosecoco	151	143		152	150	171	162	171		180	150	225	153	178
	Saitoti			125						150				125	150
	Wairimu	125	134	125	111	123	146	134	155	130	130	130	175	127	142
Dry maize	Maize	64	63	70	70	62	67	78	174	71	86	65	85	66	93
Irish potatoes	Shangi	45	59	64	96	46	51	60	87	81	108	83	61	60	80
Rice	Ahero		114						160					114	160
	Basmati	108			143	148	142	130			160	150	170	135	153
	Biriani			100	99	101				110	120	118		100	116
	Fatma rice			255						260				255	260
	Mpunga			160						170				160	170
	Pakistan		145						170					145	170
	Pishori grade 1	175		175	165	98	166	200		180	189	170	186	156	185
	Pishori grade 2	128	148					150	200					138	175
	Sindano	122		145		146	141	130		150		165	170	140	156
	Sunrice			255						260				255	260
Tamtam			140						150				140	150	
Wheat	Wheat	54	82	60	69	70	67	56	93	75	100	70	94	67	81

Source: Daily Market Survey for the month of March 2023

Wholesale and Retail Price Trends by Region

Regional differences in weekly costs were noted between weeks 1 and 5. All varieties of dry beans, all types of rice, and wheat all saw stable wholesale and retail pricing in Eldoret. When prices from week 1 were compared to those from week 5, dry maize and Irish potatoes both exhibited increases in retail prices of 24% and 11.90%, respectively. Due to their seasonality and strong demand, Irish potatoes and dry maize have seen an increase in price.

In Kisumu, a comparison between the fifth week and first week of March showed a combination of stable, reduced or increased retail and wholesale prices for various commodities. Dry beans and wheat saw reduced wholesale prices of all dry beans across the weeks. Dry maize and Irish potatoes saw increased wholesale and retail prices when week 1 prices were compared to those from week 5. Rice varieties portrayed stable retail prices. Kisumu is characterized as a large market located in a deficit area with marginal agricultural productivity hence increased food prices.

A comparison of wholesale and retail prices between week 5 and week 1 in Mombasa showed stable wholesale and retail prices for all commodities except for Irish potatoes which saw increased wholesale and retail prices. Stable prices are attributable to availability of produce from the neighboring producing regions. Increased prices of Irish potatoes is due to seasonality and high demand.

The Nairobi region recorded a combination of stable, and increased retail and wholesale prices for various commodities. Most dry beans saw stable retail prices except green/yellow and black (Njahi) beans which recorded a reduction of 5% and increases of 5.26% respectively. A comparison between the first and fifth week showed increased wholesale prices of dry maize, Irish potatoes, and all rice varieties. Nairobi is a populous city and increased prices is due to high demand and relatively low local supply.

In the Nakuru region, most commodities recorded stable and increased wholesale and retail prices. Most dry beans (Army green, Black beans, Mwitmania and Wairimu) recorded increased retail prices ranging from 2% and 20%. Nyayo beans, Rosecoco, wheat and most rice varieties saw stable wholesale and retail prices while dry maize and Irish potatoes portrayed increased wholesale and retail prices. Price increases for food commodities were caused by seasonality and excessive demand.

Mixed results were recorded in Nyeri. A comparison of retail prices between week 5 and week 1 showed reduction in retail prices for most dry beans' varieties and wheat. Dry maize and Irish potatoes recorded increased wholesale and

FOCUS ON MAIZE ACROSS SELECTED REGIONS

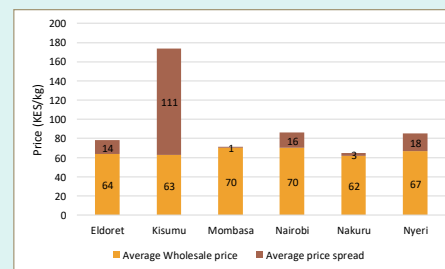
Maize farming is one of the most important agricultural activities in Kenya, contributing significantly to food security and the national economy. Maize is a warm season crop and can grow well in a wide range of soils. The top seven counties of Trans Nzoia, Uasin Gishu, Bungoma, Narok, Nakuru, Kakamega, and Nandi produce both large and small-scale quantities of maize. Kenya being a diverse country with various ecological zones, each zone has unique maize varieties. Some of the common maize varieties grown in Kenya include hybrid which comes in popular varieties including H624, H614, and H512, Open-Pollinated Varieties (OPVs), High-Altitude Maize and Quality Protein Maize (QPM).

In major growing areas, maize is planted during the long rain/main season in March and April and harvested from September to November. For short season varieties, maize matures after 3-4 months compared to 6-8 months for the long maturity seasons. Popular maize-based meal known as ugali is frequently served with meat, vegetables, and pulses. The crop's byproducts are fed to cattle and poultry, so nothing from the harvest is wasted.

In all regions, maize prices in March 2023 were unusually high. Retail prices were on average 93 KES/kg while wholesale prices were on average 66 KES/kg. Mombasa, Nairobi and Nyeri region saw higher wholesale prices whereas Kisumu region saw exorbitantly higher retail prices. Higher maize prices is attributable to low productivity due to prolonged droughts, high cost of inputs especially fertilizers which limits the ability of smallholder farmers to increase their yields and profitability.

Maize farming is an important agricultural activity in Kenya, both for subsistence and commercial purposes. With the right management practices, maize farming can be profitable and contribute to food security in the country.

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



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

retail prices while rice varieties showed stable and reduction in prices.

Comparison of National Average Prices between February and March

A comparison of overall prices (national averages for all commodities) for February and March 2023 (Table 2) shows stable wholesale and retail prices for most commodities, slight increase and decrease for a few commodities. Most

commodities saw stable retail and wholesale prices (between 3% and -4%) and slight increase of between 3% and 10%. Food commodities that saw slight increase of greater than 3% but less than 10% wholesale and retail prices included Sindano rice, Mwiternia, Army green, and

Rosecoco beans. Most of the commodities' stable wholesale and retail prices during February and March may be attributed to a surplus of goods from different producing areas as well as imports from Pakistan, Uganda, and Tanzania.

Table 2: Comparison of February and March prices

Product	Variety	Average Wholesale Price (Kes/Kg)		Percentage change	Average Retail Price (Kes/ Kg)		Percentage change
		February	March		February	March	
Dry beans	Army green	162	170	5%	203	192	-6%
	Black beans(njahi)	168	167	-1%	193	199	3%
	Green/yellow	175	172	-2%	207	209	1%
	Red Kidney	200	165	-21%	210	187	-12%
	Mwiternia	150	161	7%	173	189	8%
	Nyayo	149	146	-2%	164	165	1%
	Rosecoco	153	153	0%	170	178	4%
	Saitoti	125	125	0%	148	150	1%
Wairimu	125	127	2%	139	142	2%	
Dry maize	Maize	64	66	3%	89	93	4%
Irish potatoes	Shangi	57	60	5%	76	80	5%
Rice	Ahero	122	114	-7%	160	160	0%
	Basmati	134	135	1%	157	153	-3%
	Biriani	100	100	0%	117	116	-1%
	Mpunga	159	160	1%	169	170	1%
	Pishori grade 1	140	140	0%	182	183	1%
	Pishori grade 2	137	138	1%	175	175	0%
	Sindano	126	140	10%	149	156	4%
Tamtam	140	140	0%	150	150	0%	
Wheat	Wheat	68	67	-1%	86	81	-6%

Key	
<3 but >4	Stable
>4 but <-21	Decrease
>3 but < 10	Slight increase

Source: Daily Market Survey for the month March 2023

Outlook for the Month of April

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

- Domestic food price inflation remains high globally with major grain prices remaining mostly unchanged.
- Due to below-average harvests, strong demand, and high worldwide pricing, food prices will continue to be high.
- The burden on importers has risen because of the shilling's continuous depreciation against the US dollar, leading to higher import costs and overall food prices.
- The price of wheat flour could come down in the coming weeks following the arrival of Ukrainian wheat at the port of Mombasa.

FOCUS ON KISUMU REGION

Kisumu in western Kenya is situated on the shores of Lake Victoria, Africa's largest and the world's second largest freshwater lake. After Nairobi, the nation's capital, and Mombasa, a seaside city, Kisumu is the third-largest city in Kenya. After Kampala, Uganda, and Mwanza, Tanzania, it is the third-largest city in the Lake Victoria Basin. Although it is a sizable market situated in a region with a food shortage and low agricultural production, the location offers a favorable setting for agricultural and aquatic cultural activities. Rice is grown under irrigation in the Kano Plains. The northern and eastern fringes of the Kano Plains also play host to some of Kenya's most productive sugarcane fields. Towns like Kibos, Miwani and Chemelil are centres of sugarcane production. Kisumu County also produces maize, beans, sweet potatoes, poultry and fresh vegetables.

Commodity prices are collected from Kibuye market, one of the largest open-air market in Eastern and Central Africa. The market provides fresh produce and other agricultural and non-agricultural goods to the majority of the surrounding sub-counties and counties in the Nyanza area. Both the retail area and the wholesale market sell a variety of agricultural goods. The County government of Kisumu manages the Kibuye Market, which is accessible to the general public for shopping. The market is open every day of the week, starting at 4:00 am on a normal day.

Traders sourced traded food commodities from various regions, dry maize was sourced from Trans-Nzoia (Kitale), Busia (Kenya-Uganda border) and Uasin-Gishu (Eldoret) counties, Irish potatoes from Narok, Elgeyo-Marakwet and Nakuru counties (Molo), dry beans from Western and Uganda (Busia) and wheat from Busia (Kenya-Uganda border).

During March, prices of most commodities saw a reduction of prices when week 1 wholesale prices were compared to week 5, with reductions ranging between 1% and 18%. Due to strong demand and limited supply caused by transportation system disruption brought on by political demonstrations that wracked the city, particularly on Mondays and Thursdays during the month of March, Irish potatoes had a larger margin of 35%.

Table 3: Average Retail and Wholesale Prices, Kisumu Region

Product	Variety	Average w/sale price (KES/kg)					Total average w/sale price (KES/kg)	Total average retail price (KES/kg)
		Week 1	Week 2	Week 3	Week 4	Week 5		
Dry beans	Black beans(njahi)	142	142	142	140	140	141	200
	Green/yellow	188	158	160	162	162	164	249
	Nyayo	158	130	130	129	129	134	160
	Pinto beans	160	160	160	158	158	159	212
	Red kidney	140	140	140	140	140	140	200
	Rosecoco	163	140	140	140	140	143	171
	Wairimu	150	125	136	133	132	134	155
Dry maize	Maize	64	60	62	64	65	63	174
Irish potatoes	Shangi	49	54	61	64	66	59	97
	Ahero	112	113	114	114	114	114	150
Rice	Pakistan	145	145	145	145	145	145	170
	Fishori grade 2	147	149	148	148	148	148	200
Wheat	Wheat	83	80	80	84	82	82	93

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

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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