



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

Highlights

- ▶ Weekly wholesale and retail average prices of maize in the East African region exhibited unstable movements. These were more pronounced in Kenya and Uganda. However, in Rwanda and Tanzania, the weekly average prices were more benign. Kenya had the highest prices in the region, followed by Rwanda, and then Tanzania and Uganda recorded the lowest prices.
- ▶ Weekly wholesale and retail average prices of domestically produced rice in East Africa were more stable throughout April. Similarly, prices remained elevated in Kenya and the highest in the region. This was followed by prices in Rwanda, then Tanzania and Uganda had the lowest. However, rice prices in Uganda declined in the second week of April compared to the rest of the countries.
- ▶ In addition, prices of imported rice observed in specific East African countries were stable in Uganda and Rwanda but unstable in Kenya. Furthermore, Pakistan rice's price dominates the Ugandan market compared to other varieties. In Rwanda, the price of rice No. 1 from Tanzania dominated the market compared to the rest. In Kenya, there was a significant variation between the retail prices of Pakistani and wholesale rice.

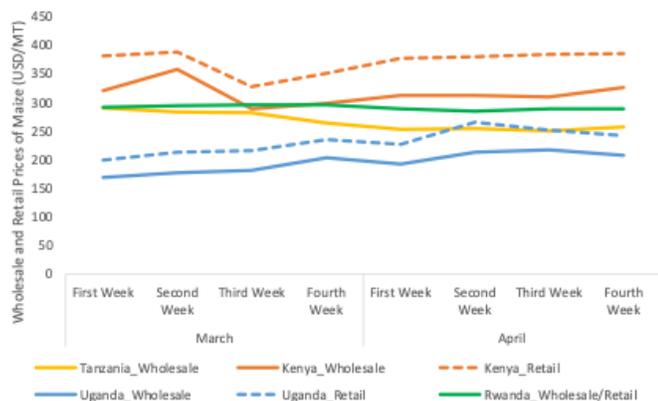
Changing Maize Prices in East Africa

The weekly average wholesale and retail prices of maize in the selected East African countries were slightly stable in April compared to March. Notwithstanding, in the East African region, Kenya recorded the highest wholesale and retail prices of maize, followed by Rwanda, and then Tanzania and Uganda recorded the lowest prices (Figure 1). Categorically, in Rwanda, prices of maize decreased in April compared to March. This is primarily attributed to the adequate availability of domestic supply (FAO, 2024). In Uganda, the wholesale and retail prices of maize dropped in the first week of April but then increased in the second week and decreased again throughout the rest of the weeks. According to FAO (2024), retail prices of maize in Uganda seasonally increased, but average prices remained low compared to earlier years' levels due to adequate domestic availability.

Moreover, Annual Food Inflation decreased by 1.0 percent in April compared to 0.7 percent recorded in March (UBoS, 2024). However, we observed mixed patterns in Kenya. The retail prices of maize remained elevated throughout April while the wholesale prices decreased. This is in tandem with FAO (2024). The report found that the wholesale prices of maize decreased in April following seasonal patterns as the secondary short-rains season harvest gathered in February, increasing market availability. Also, the national average price of maize grain was reduced by 3.6% in April (KNBS, 2024).

Meanwhile, in Tanzania, wholesale prices of maize have decreased significantly, maintaining a downward trend since mid-March and throughout April. According to FAO (2024), the wholesale prices of maize seasonally declined in March. Further, the region had adequate domestic supply and reduced export demand. Also, food stocks at the National Food Reserve Agency (NFRA) have continued to increase, exemplifying a reduction in wholesale prices (Bank of Tanzania, 2024).

Figure 1: Average wholesale and retail price of maize in East Africa (March - April 2024)

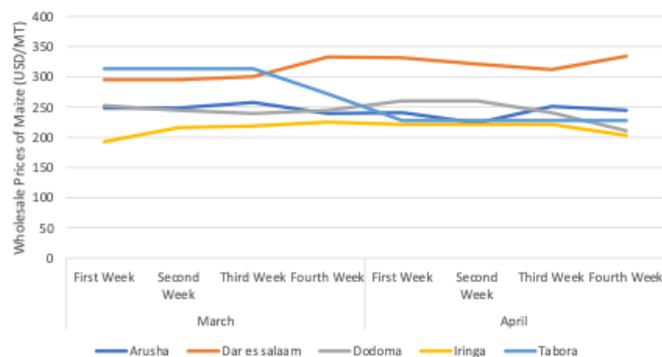


Source: Authors' construction using data from FSP (for Uganda and Tanzania), Ministry of Agriculture Livestock and Fisheries (for Kenya), and e-SoKo (for Rwanda).

Tanzania

For weekly wholesale prices of maize in selected markets in Tanzania, we observe unusual movements, as seen in Figure 2. Illustratively, while the average weekly wholesale prices of maize in Dar es Salaam were lower than in the Tabora market in March, they rose above the Tabora market in April and became the highest in Tanzania. This could result from increased demand by residents of Dar es Salaam, given that it's the capital city of Tanzania. Thus, Dar es Salaam is the primary consumer market in Tanzania (FEWS NET, 2024). Equally, weekly average wholesale prices of maize in Tabora market sharply fell from the third week of March until April when they were below average prices in Arusha and Dodoma markets. The price decrease may be due to a higher supply of maize in different regions of Tanzania. Also, the secondary season Vuli harvest caused wholesale prices to fall in March (FAO, 2024). However, there is a noticeable fluctuation in the average weekly wholesale prices of maize in the Dodoma and Arusha markets throughout March and April. The weekly wholesale prices of maize in the Iringa market were observed to be the lowest in Tanzania. This price trend can be attributed to the fact that Iringa is a well-known maize-producing region, resulting in a consistently high supply of maize in the area.

Figure 2: Average weekly wholesale prices of maize in selected markets in Tanzania (March – April 2024)



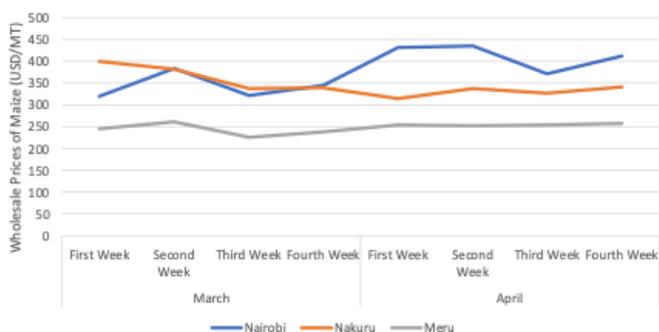
Source: Authors construction using data from the Ministry of Investment, Industry and Trade for Tanzania.

Kenya

In April, the weekly average wholesale prices of maize in Kenya's Nairobi and Nakuru markets continued to exhibit the instability observed in March. However, the weekly average wholesale price of maize in the Meru market remained stable during this period, in contrast to the fluctuations in Nairobi and Nakuru (see Figure 3). Interestingly, in April, the weekly average wholesale prices in the Nakuru market exceeded those in the Nairobi market, marking a reversal from the situation seen in March. The price trends observed in the Nairobi and Nakuru markets result from various factors, including the overall increased cost of living, which impacts consumer purchasing power and uncertainties in the supply and demand of maize. These uncertainties could be linked to factors such as weather patterns, production levels, and market dynamics.

In contrast, while the market in Meru exhibited more price stability, they were the lowest compared to the Nairobi and Nakuru markets. This is due to a reduced demand for maize in households. This reduced demand could be influenced by factors such as alternative food options, dietary preferences, or even local production capabilities.

Figure 3: Average weekly retail prices of maize in selected markets in Kenya (March - April 2024)

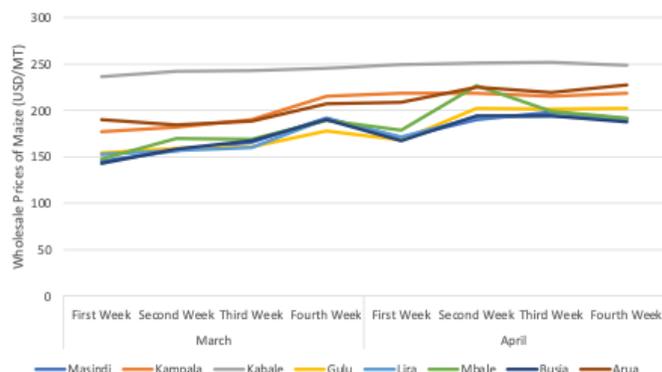


Source: Authors' construction using data from the Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya.

Uganda

In Figure 4, we can observe that the wholesale weekly average prices of maize in selected markets in Uganda, including Arua, Busia, Masindi, Mbale, Lira, Gulu, and Kampala, exhibited higher volatility compared to the Kabale market. Despite having the highest prices, Kabale market was characterized by more stability. Notably, Kabale market stood out with a significant price difference from the other markets. For regions that do not produce maize, such as Kampala and Arua, the wholesale prices were relatively high and similar. Similarly, Lira, Masindi, and Busia markets also demonstrated similar prices. However, in the second week of April, prices in the Mbale market surged to match those in Kampala and Arua.

Figure 4: Average weekly retail prices of maize in selected markets in Uganda (March - April 2024)



Source: Authors construction using data from the Daily Market Traders Survey for Uganda

Comparison of wholesale and retail maize prices in East Africa

In the data presented in Table 1, it is evident that there were diverse trends in the monthly wholesale and retail prices of maize across the East African region. Specifically, the monthly average wholesale prices experienced a decrease in Tanzania, Rwanda, and Kenya, while they saw an increase in Uganda. On the other hand, the monthly average retail prices increased in Kenya and Uganda but decreased in Rwanda. Delving deeper into the numbers, it is noteworthy that Uganda exhibited the highest monthly average percentage increase at 14% for both wholesale and retail prices. On the other hand, Kenya saw a 1 percent decrease in wholesale prices and a 6 percent increase in retail prices. Meanwhile, Rwanda experienced a 2% decrease, and Tanzania had the smallest reduction at 10%. These fluctuations highlight the dynamic nature of maize prices in the region.

Table 1: Changes in average monthly retail and wholesale price of maize in East Africa for March – April, 2022-2024

Commodity	Country	Market Levels	Monthly Average Prices March	Monthly Average Prices April	% Change	Trends
Maize	Kenya	Retail	361	381	6%	▲
Maize	Uganda	Retail	215	246	14%	▲
Maize	Rwanda	Retail	294	287	-2%	▼
Maize	Kenya	Wholesale	316	314	-1%	▼
Maize	Uganda	Wholesale	182	207	14%	▲
Maize	Rwanda	Wholesale	294	287	-2%	▼
Maize	Tanzania	Wholesale	280	253	-10%	▼

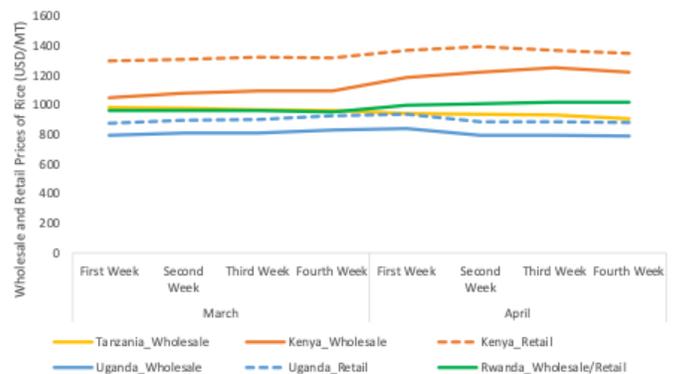
▼ = Decrease ▲ = Increase ► = Constant

Source: Authors construction using data from FSP (for Uganda), Ministry of Agriculture Livestock and Fisheries (for Kenya), Ministry of Agriculture (for Tanzania), and e-SoKo (for Rwanda)

Changing Rice Prices in East Africa

In Figure 5, a comparison of the weekly average wholesale and retail rice prices in the East African region shows that rice prices have been more stable than maize prices. However, both wholesale and retail prices have remained high in the region. Kenya has the highest prices, followed by Rwanda and Tanzania, and Uganda has the lowest prices. In Kenya, both wholesale and retail rice prices increased in April compared to March, possibly due to scarcity of supply and heightened demand in the region. In Rwanda, rice prices were slightly higher in April compared to March, possibly due to increased demand after the government removed VAT on cereal. In Tanzania, wholesale prices were stable throughout March and April, likely due to Tanzania being a major rice producer and a net exporter in the region. The region is also experiencing a rice harvest in most areas (FEWS NET, 2024). Wholesale and retail prices of rice in Uganda decreased at the same time and followed a similar pattern. The decrease is in tandem with a reduction in Food Inflation by 1.0 percent in April 2024 compared to 0.7 percent recorded in March 2024 (UBoS, 2024).

Figure 5: Weekly average wholesale and retail prices of rice in East Africa (March - April 2024)



Source: Authors' construction using data from the Ministry of Investment, Industry and Trade for Tanzania, eSoKo for Rwanda and the Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya and the Daily Market Traders Survey for Uganda.

Similarly, the monthly average wholesale and retail prices of rice posed mixed trends (Table 2). To demonstrate this, retail and wholesale prices in Kenya increased by 4 percent and 13 percent, respectively. In Uganda, the retail prices of rice in April remained constant at 0% by 12.2%, but wholesale prices reduced by 1 percent. In Tanzania, the monthly average wholesale price of rice decreased by 4.%. This is attributed to the bumper harvest. In Rwanda, the monthly average price of rice increased by 5%.

Table 2: Monthly retail and wholesale price changes of rice in East Africa (March to April 2024, April 2023, and April 2022)

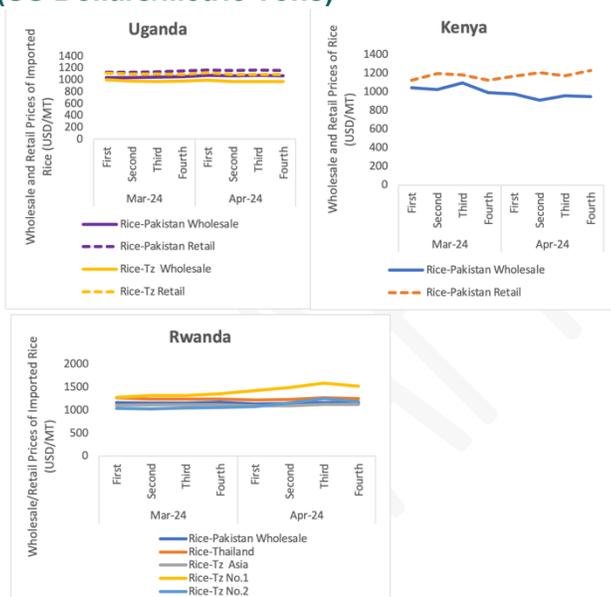
Commodity	Country	Market Levels	Monthly Average Prices March	Monthly Average Prices April	% Change	Trends
Rice	Kenya	Retail	1307	1365	4%	▲
Rice	Uganda	Retail	896	893	0%	▶
Rice	Rwanda	Retail	956	1007	5%	▲
Rice	Kenya	Wholesale	1077	1217	13%	▲
Rice	Uganda	Wholesale	809	801	-1%	▼
Rice	Rwanda	Wholesale	956	1007	5%	▲
Rice	Tanzania	Wholesale	968	927	-4%	▼

▼ = Decrease ▲ = Increase ▶ = Constant

Source: Author's construction using data from the Ministry of Investment, Industry and Trade for Tanzania, eSoKo for Rwanda Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya and Daily Market Traders Survey for Uganda

Figure 6 examines the movements in imported rice prices in the respective East African countries. While a general observation in Uganda and Rwanda shows prices are more stable, in Kenya, they were unstable. The stability of imported rice prices in Uganda and Rwanda could be attributed to the bumper harvest in Tanzania. In Uganda, the retail and wholesale prices of Pakistan rice were higher than those imported from Tanzania. However, this phenomenon is different in Rwanda, and we observe that Rice No. 1 from Tanzania was the most expensive compared to other varieties. This is not surprising since rice from Tanzania is in high demand in Rwanda. Tanzania is also a major producer and source of rice in the region, while Kenya and Uganda are minor producers (FAO, 2024). In Kenya, the retail price of imported Pakistan rice was significantly higher than wholesale but volatile. This volatility of imported Paksitan rice in Kenya could attributed to Weakening local currencies against the US dollar.

Figure 6: Trends of weekly average wholesale and retail prices of imported rice in East Africa (US Dollars/Metric Tons)



Source: Authors construction using data from the Ministry of Investment, Industry and Trade for Tanzania, eSoKo for Rwanda and the Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya and the Daily Market Traders Survey for Uganda.

Summary and Future Outlook

Wholesale and retail prices of maize in East Africa were generally unstable, with greater instability in Kenya and Uganda. In Tanzania, prices significantly declined from mid-March to April due to a bumper harvest. Meanwhile, in Rwanda, the weekly average prices of maize remained stable throughout March and April. To assist poor households, Rwanda has waived the value-added tax on maize. However, the after-effects of the El Nino rains could continue to keep maize prices high, especially in the first and second quarters of 2024.

On the other hand, the weekly average prices of domestically produced rice in East Africa remained stable. Similarly, imported rice prices in Uganda and Rwanda were also stable. This stability was largely due to the bumper harvest in the region and the waiver of VAT on rice in Rwanda. On the other hand, imported rice prices in the East African region fluctuated throughout November. The instability of imported rice in Kenya was attributed to the weakening of local currencies against the US dollar. The outlook for domestically produced rice is expected to remain stable due to the anticipated bumper harvest following drought seasons. Additionally, the prices of imported rice in Kenya are projected to stabilize as the Kenyan Shilling begins to appreciate against the US dollar.

Data and Methodology

Data for wholesale and retail prices of rice and maize for Uganda and Tanzania were obtained from the (1) Food security Portal (FSP)¹ facilitated by the International Food Policy Research Institute, (2) Kenya Market Information System² sourced for the Ministry of Agriculture Livestock Fisheries and Co-operatives (MALF) for Kenya, and e-Soko (3)³ for Rwanda. Also, we maintain that the data source for commodity prices for Rwanda neither indicates whether the prices are retail or wholesale. Further, the data for Kenya and Rwanda were collected in the local currencies, measured in Kshs/Kg and Rwf/Kg, and converted to USD/MT.

Additionally, we averaged the weekly and daily wholesale and retail prices of maize and rice across the markets for each country in East Africa while drawing comparisons between January and February. We also analysed within-country weekly average wholesale prices of maize in selected markets of Uganda and Kenya. We also computed monthly average changes in rice wholesale and retail prices between January and February for the East African region to quantify any changes in the two periods. Finally, we constructed graphs of wholesale and retail prices of domestically produced and imported rice for Uganda and Rwanda.

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