



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

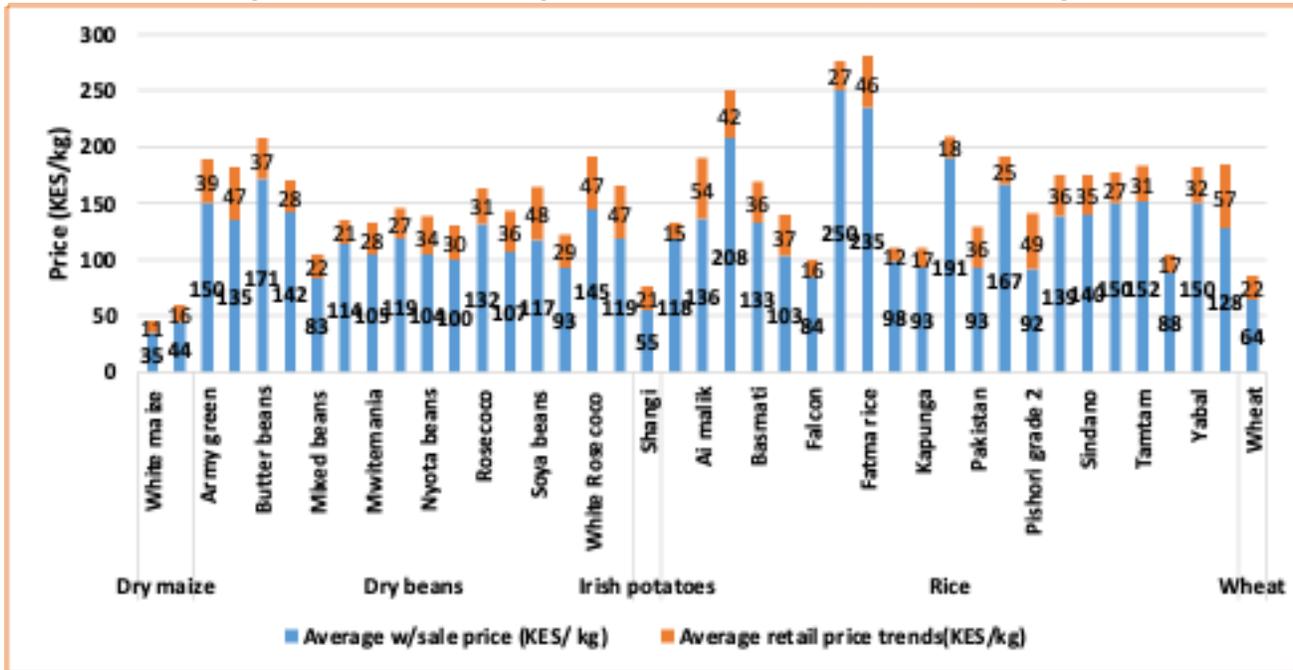
- ▶ Variations in food commodity pricing margins are driven by factors such as seasonal demand fluctuations, the presence of middlemen and producer brokers, repackaging expenses, and transportation costs.
- ▶ Regional price differences are shaped by disparities in supply and demand, intermediary activities, transport costs, and unique local market conditions.
- ▶ In November, despite being the maize harvest season in major producing areas, higher dry maize prices in some regions result from increased urban demand, elevated transportation costs, and the concentration of intermediaries.
- ▶ Price stability for certain commodities reflects the steady availability of produce within the region and from neighboring producing counties.
- ▶ Price surges in certain bean varieties, rice, and Irish potatoes are linked to increased demand during the festive season, as these foods are staples in celebratory meals.

Overall Wholesale and Retail Prices for November

In November 2024, Figure 1 highlights the average wholesale and retail prices of maize, beans, potatoes, rice, and wheat across major Kenyan markets. Most commodities exhibited price margins within the ranges of 6%–20% and 21%–30%, including dry maize, certain dry bean varieties, dry wheat, and some types of rice. A smaller

subset of dry beans and rice varieties recorded price margins between 31%–40%. Notably, Pishori rice had the highest price margin at 53%, likely driven by increased demand during the festive season given that the commodity is considered premium. Pricing margin variations of food commodities are influenced by factors such as season demand fluctuations, existence of middlemen and producer brokers, repackaging costs, and transport costs.

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



Source: Daily Market Survey for the month of November 2024

Wholesale and Retail Commodity Prices

Various types of beans were found across the surveyed regions. Black beans (Njahi), Nyayo, Rosecoco, and Wairimu were widely available in all selected areas, whereas Army Green, Green Yellow, and Mwitemania beans were common everywhere except Kisumu. Yellow beans were found in all regions except Nairobi. Notably, Kisumu had the lowest accessibility to bean varieties compared to other regions. As expected, retail prices for all bean types were higher than wholesale prices. In Nakuru, wholesale prices for all available bean varieties were below the national wholesale average, attributed to an abundant supply surpassing local demand. Retail prices in both Mombasa and Nakuru were lower for most bean types. Price variations across regions were influenced by differences in supply and demand, intermediary involvement, transportation costs, and local market dynamics.

All regions reported the availability of dry white maize. Nairobi, Kisumu and Mombasa showed higher wholesale prices all at 38 KES/kg, compared to the national average wholesale price of 35 KES/kg. Additionally, Nairobi, Nakuru and Nyeri recorded higher retail prices of 48 KES/kg for Nairobi and Nakuru and 50 KES/kg for Nyeri compared to the national average retail price of 46 KES/kg. The higher prices of dry maize in some regions in November are due to

increased demand in urban areas, higher transportation costs, and the concentration of intermediaries in these regions. Despite Nakuru being a major producing region, higher retail price is due to high local demand, the role of intermediaries, and the storage of maize by traders and farmers anticipating better prices in the future.

In Nairobi and Nyeri, Irish potatoes commanded higher wholesale prices at 85 KES/kg and 66 KES/kg, respectively, compared to the national average wholesale price of 55 KES/kg. Similarly, Nairobi and Mombasa recorded notably higher retail prices of 93 KES/kg and 84 KES/kg, respectively, in contrast to the national average retail price of 76 KES/kg. The higher prices of Irish potatoes in Nairobi and Mombasa during November can be attributed to strong demand in urban areas due to the festive season, limited local production, and increased transport costs from potato-growing regions such as Nakuru and Nyandarua.

All regions reported the availability of Biriani and Pishori rice, with Basmati rice common in every region except Nakuru, while Sindano rice was available everywhere except Nairobi. Wholesale and retail prices for most common rice varieties were higher in Eldoret, due to limited local supply, increased transportation costs from major rice-producing regions, higher demand from the urban population and surrounding institutions, and heightened demand during the festive season.

Retail prices for wheat were slightly higher in Eldoret and Kisumu at 100 KES/kg in both regions, surpassing the national average of 86 KES/kg for dry wheat. The increase was driven by heightened demand and limited local supply during this period. Despite being an agricultural hub, Eldoret

experiences seasonal fluctuations that reduce wheat availability post-harvest, contributing to price increases. In Kisumu, reliance on wheat transported from producing regions adds to costs, exacerbated by rising fuel and transport expenses.

Table 1: Average wholesale and retail prices (kes/kg) by region for November 2024

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	Amy green	150		155	161	140	144	200		200	180	180	185	150	189
	Black beans(Njahi)	152	164	153	164	97	78	243	281	167	180	120	100	135	182
	Butter beans	179			200	157		240			203	178		171	208
	Green/yellow	135		138	160	132	144	193		134	178	166	180	142	170
	Mixed beans	61	111	75		80	101	82	120	90		120	120	83	105
	Mwitmania	103		86	147	80	111	140		96	170	120	140	105	133
	Nyayo	103	115	114	150	118	115	130	144	130	170	153	150	119	146
	Rosecoco	110	130	118	158	120	156	150	175	145	180	180	170	132	163
	Sailoi	110		116	141	76		141		125	166	150		107	143
	Wainimu	73	101	110	94	80	103	91	140	124	113	120	145	93	122
Yellow	121	139	120		95	119	161	214	160		143	150	119	166	
Dry maize Irish potatoes	White maize	28	38	38	38	36	34	39	47	44	48	48	50	35	46
	Shangi	37	47	46	85	55	66	45	69	84	93	78	80	55	76
Wheat	Basmati	147	124	136	146		112	225	151	179	160		130	133	169
	Biriani	110	114	95	109	85	105	146	206	111	125	120	130	103	140
	Mara 777			260		148	152			274		170	170	191	209
	Pakistan		64				106		150				120	93	129
	Pishori grade 1	172		153	189	173	183	220		169	188	208	200	167	192
	Pishori grade 2	100	84					142	140					92	141
	Sindano	148	156	142		124	128	198	192	178		160	147	140	175
	Wheat	65	64	64	67	59	64	100	100	65	82	87	80	64	86

Source: Daily Market Survey for the month of November 2024

Wholesale and Retail Price Trends by Region

Between week one and weeks two through four, various regions experienced weekly price fluctuations. In the Eldoret region, food commodity prices exhibited a mix of stability, increases, and decreases. A comparison between weeks one and four shows that retail prices for certain dry bean varieties and most rice varieties remained stable. However, some dry bean varieties saw a reduction in retail prices ranging from 1% to 9%. Conversely, retail prices increased for other dry bean varieties (8%–15%), dry maize (4%), Irish potatoes (1%), Pishori rice (7%), and Biriani rice (3%). The price increases for some bean varieties, rice, and Irish potatoes can be attributed to heightened demand during the festive season, as these items are commonly featured in celebratory meals.

A comparison of prices in Kisumu from week one to week four revealed varying trends in wholesale and retail prices for food commodities, with most showing increases. Wholesale and retail prices for all dry beans rose by 6%–33% and 4%–25%, respectively. Maize experienced wholesale and retail price increases of 33% and 21%, respectively while Shangi Irish potatoes recorded increased wholesale price of 4%. Wheat prices remained stable for both wholesale and retail. Rice prices exhibited a mix of stability, decreases, and increases in retail prices, while wholesale prices for all available rice varieties rose by 3%–39%. The overall increase in food commodity prices is attributed to Kisumu's status as a non-producing region and heightened demand during the festive season.

In the Mombasa region, a comparison of prices from week one to week four showed that most commodities maintained stable wholesale and retail prices, with a few exceptions experiencing slight decreases or increases. Commodities with slight price reductions, ranging from 0.2% to 6%, included Saitoti beans and some rice varieties (Biriani, Pishori, Basmati, and Tamtam). Conversely, dry maize, Shangi Irish potatoes, and green yellow beans recorded price increases of 2% to 9%. This overall stability can be attributed to the seasonal availability of food commodities in the region, neighboring counties, and East African countries.

FOCUS ON MAIZE ACROSS SELECTED REGIONS

Despite maize's importance to Kenya's agricultural sector, the country's maize trade faces several challenges that affect both farmers and traders. Price volatility is a major concern, influenced by factors such as unpredictable weather, market speculation, and shifting government policies on imports and exports. Post-harvest losses, driven by inadequate storage and pest infestations, further undermine the profitability of maize traders. High transportation costs, particularly in rural areas where maize is produced, increase the overall cost of marketing the crop.

Moreover, maize traders often struggle to access reliable markets and up-to-date market information, limiting their ability to make informed decisions and secure favorable prices. Government regulations, trade policies, and licensing requirements present additional hurdles, impacting the operations and profitability of traders. Finally, fierce competition, both locally and internationally, complicates marketing strategies and puts pressure on profit margins.

In November 2024, retail prices in Mombasa, Nairobi, Nakuru, and Nyeri were slightly above the national averages. This increase in prices was driven by higher demand, seasonal variations, and rising marketing costs. The Eldoret region experienced lower wholesale and retail prices than the national averages, driven by a surplus during the harvest period in the region and neighboring production areas.

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

Region	Average wholesale price (KES/kg)	Average retail price (KES/kg)	Total average wholesale price (KES/kg)	Total average retail price (KES/kg)
Eldoret	29	39	35	46
Kisumu	39	47		
Mombasa	39	44		
Nairobi	38	48		
Nakuru	36	46		
Nyeri	34	50		

Source: Daily Market Survey for the month of November 2024.

A comparison of wholesale and retail prices in Nairobi between week one and week four revealed a mix of stable, decreasing, and mostly increasing prices. Wholesale prices for all dry bean varieties rose by 1% to 11%, except for army green beans, which remained stable. Maize prices increased by 16%, wheat by 5%, and all available rice varieties by 2% to 11%, while Shangi Irish potatoes saw a 2% decline. The increase in food commodity prices in Nairobi is largely attributed to the city's high population, driving greater demand, coupled with its status as a non-agricultural producing region.

A comparison of prices between week one and week four in Nakuru revealed a mix of stable, increasing, and declining wholesale and retail prices, with most commodities showing stability. Retail prices for all dry beans remained stable, except for certain varieties that recorded increases: butter beans (4%), green yellow beans (3%), soybeans (2%), and yellow beans (18%). Dry maize prices rose by 18%, while Shangi Irish potatoes and wheat saw declines of 3% and 11%, respectively. All available rice varieties maintained stable prices, except for Pishori rice, which decreased by 9%. The price stability for most food commodities in Nakuru, a major producing region, is attributed to seasonality and surplus production, leading to market flooding and lower prices.

A comparison of wholesale and retail prices in the Nyeri region between weeks one and four revealed a mix of price stability, decreases, and increases, with most commodities showing stable prices. Retail prices for all available food commodities, including dry beans, dry maize, Irish potatoes, rice, and wheat, remained stable, except for Wairimu beans, which increased by 7%, and Sindano rice, which decreased by 6%. The stability in commodity prices is attributed to the consistent availability of produce in the region and neighboring producing counties.

Comparison of National Average Prices between October and November

A comparison of overall national average prices for all commodities between October and November 2024 indicates that most wholesale and retail prices either remained stable or decreased (see Table 2). Retail and wholesale prices for most commodities declined, with variations ranging from 1% to -15%. This trend is likely driven by an ample supply of food commodities from various production regions, supplemented by imports from neighboring East African countries and beyond, including Pakistan, Thailand, and India. However, slight price increases of 1% to 10% were observed for some commodities, primarily attributed to heightened demand during the festive season.

Table 2: Comparison of October and November prices

Product	Variety	Average Wholesale Price (Kes/Kg)		Percentage change	Average Retail Price (Kes/ Kg)		Percentage change
		October	November		October	November	
Dry maize	White maize	35	35	0%	44	46	4%
	Yellow maize	45	44	-2%	56	60	7%
Dry beans	Army green	154	150	-3%	191	189	-1%
	Black beans (Njahi)	136	135	-1%	185	182	-2%
	Butter beans	173	171	-1%	211	208	-1%
	Green/yellow	144	142	-1%	170	170	0%
	Mixed beans	77	81	5%	102	106	3%
	Mwezi moja	126	114	-11%	154	135	-14%
	Mwiternia	107	105	-2%	135	133	-2%
	Nyayo	117	119	2%	145	146	1%
	Nyota beans	114	104	-10%	140	138	-1%
	Red kidney	100	100	0%	130	130	0%
	Rosecoco	128	132	3%	162	163	1%
	Saitoti	113	107	-6%	150	143	-5%
	Soya beans	125	117	-7%	165	165	0%
	Wairimu	92	93	1%	117	122	4%
	White Rosecoco	133	140	5%	148	155	5%
	Yellow	118	119	1%	159	166	4%
Irish potatoes	Shangi	58	55	-5%	80	76	-5%
Rice	Ahero	120	118	-2%	130	133	2%
	Ainab	219	208	-5%	250	250	0%
	Basmati	131	133	2%	161	169	5%
	Binani	103	103	0%	135	140	4%
	Faloon	84	84	0%	100	100	0%
	Fatma rice	239	235	-2%	282	281	0%
	Mara 777	187	191	2%	204	209	2%
	Pakistan	105	93	-14%	120	129	7%
	Pishori grade 1	169	167	-1%	194	192	-1%
	Pishori grade 2	90	92	2%	137	141	3%
	Sana	136	139	2%	168	175	4%
	Sindano	140	140	0%	175	175	0%
	Sunrice	150	150	0%	163	177	8%
	Tamtam	155	152	-2%	176	183	4%
	Tosha super	88	88	0%	105	105	0%
	Yabal	148	150	1%	173	182	5%
	Wheat	Wheat	68	64	-6%	93	86

Key

<1 but <= -5	Stable
>5 but <=15	Major decrease
>1 but <=10	Slight increase

Source: Daily Market Survey for the month of October 2024

Outlook for the Month of December

- ▶ **Dry Maize:** Prices are likely to remain stable or decrease slightly due to a good harvest from the ongoing long rains season, complemented by imports from Uganda and Tanzania. Demand is expected to rise with school reopening and household stocking for the festive season.
- ▶ **Beans:** Prices are projected to remain high in some regions due to reduced production caused by erratic rainfall during the growing season. Demand will remain strong, reflecting its role as a staple protein source for most households, even during the festive season.
- ▶ **Rice:** Prices are expected to increase moderately, driven by heightened festive season demand and dependence on imports from Asia (Pakistan, Thailand, and India). Urban centers will see elevated demand due to changing dietary preferences and holiday consumption patterns. Domestic production remains limited, with imports bridging the gap.
- ▶ **Wheat:** Prices are likely to rise slightly, influenced by high import costs and global market volatility. Demand is expected to remain steady in December, driven primarily by urban consumption, especially for bread and other baked goods.
- ▶ **Irish Potatoes:** Prices are anticipated to decline or stabilize, supported by ample harvests in highland regions such as Nyandarua, Meru, and Nakuru counties. Demand is projected to be moderate, with increased consumption linked to urban demand and holiday festivities.
- ▶ **Overall Trend:** The festive season in December is expected to drive increased demand for all staples, amplifying consumption patterns across urban and rural areas.

FOCUS ON NYERI REGION

Nyeri County, situated in central Kenya, is one of the country's 47 counties, renowned for its diverse landscape of hills and fertile plains. The county's capital and largest town, Nyeri, is a hub for vibrant agricultural activity. As reported in the 2019 Kenyan Population and Housing Census, Nyeri County has a population of 759,164, reflecting a 9.5% growth since the 2009 census.

Agriculture is the backbone of the county's economy, with key activities including coffee and tea cultivation, dairy farming, horticulture, and livestock rearing, which serve as primary income sources for most residents. The county's staple food crops include maize, beans, wheat, bananas, Irish potatoes, sweet potatoes, and various vegetables.

Agribusiness is a vital driver of Nyeri's economy, with agricultural goods sourced from local farmers and neighboring counties. The Karatina open-air market, located in Karatina Town, is a pivotal trade hub in East Africa and the second largest in the region for wholesale and retail transactions. It serves the majority of Nyeri's sub-counties and neighboring regions, offering a wide range of products, including fruits, vegetables, cereals, and other market goods.

In the Nyeri region, most commodity prices in November 2024 remained steady in both retail and wholesale markets from week one to week four, with only a few showing slight decreases or increases. This price stability is attributed to the consistent availability of food commodities within the region and neighboring counties.

Table 3: Average Wholesale and Retail Prices, Nyeri Region

Product	Variety	Average wholesale price (KES/ kg)				Average retail price (KES/ kg)				Total average wholesale price (KES/kg)	Total average retail price (KES/kg)
		Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4		
Dry beans	Army green	144	144	144	144	185	185	185	185	144	185
	Black Beans(Njiri)	78	78	78	78	100	100	100	100	78	100
	Green/yellow	144	144	144	144	180	180	180	180	144	180
	Mixed beans	100	101	102	102	120	120	120	120	101	120
	Mulimansa	111	111	111	111	140	140	140	140	111	140
	Nyayo	113	114	117	117	150	150	150	150	115	150
	Osoboco	106	106	106	106	170	170	170	170	106	170
	Soya beans	133	133	133	133	180	180	180	180	133	180
	Wairimu	100	102	106	106	140	143	150	150	103	145
	Yellow	119	119	119	119	150	150	150	150	119	150
Dry maize	White maize	33	33	33	36	50	50	50	50	34	50
Irish potatoes	Shangi	87	87	86	84	80	80	80	80	86	80
Rice	Bazarati	112	112	112	112	130	130	130	130	112	130
	Biani	106	106	104	103	130	130	130	130	105	130
	Kangoni	98	98	97	97	110	110	110	110	98	110
	Kapunga	94	94	93	92	110	110	110	110	93	110
	Pakistani	106	106	106	106	120	120	120	120	106	120
	Plumcot grade 1	183	183	183	183	200	200	200	200	183	200
Sorgho	Sindano	128	128	128	128	150	150	147	140	128	147
	Tosha super	88	88	88	88	105	105	105	105	88	105
Wheat	Wheat	84	84	84	84	80	80	80	80	84	80

Source: Daily Market Survey for the month of November 2024.

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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