FOOD SECURITY PORTAL FACILITATED BY IFPRI

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FOOD PRICE MONITOR: MAIZE AND RICE IN EAST AFRICA

JULY 2025

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.

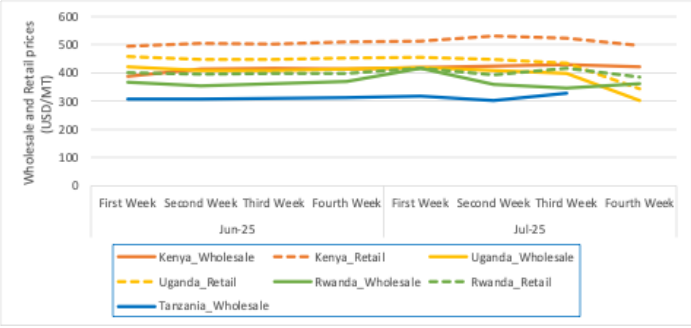
Highlights

- Between June and July 2025, maize and rice markets across East Africa displayed contrasting dynamics driven by seasonal harvests, regional trade flows, and international market trends.
- Maize prices fell sharply in Uganda due to new harvests, while rising in Kenya and stabilizing in Rwanda and Tanzania, highlighting the region's interdependence and the importance of cross-border trade.
- In contrast, rice prices were more stable but heavily influenced by global markets, with international price drops for Pakistani and Thai rice likely due to the weakening of the dollar against the hard currencies. The local currencies have also appreciated against the dollar and this partly explains the drop in the price of imported rice.
- Tanzania consistently offered the lowest prices for both staples, reinforcing its role as a regional stabilizer. However, price transmission inefficiencies, poor infrastructure, and policy gaps limited the benefits of lower producer or global prices reaching consumers.
- To enhance regional food security, coordinated trade policies, improved market access, better information systems, and investments in production and storage are essential.

Changing Maize Prices in East Africa

The wholesale and retail prices of maize across Kenya, Uganda, Rwanda, and Tanzania reveal contrasting patterns in price stability, volatility, and regional inflation dynamics (Chart 1). Kenya exhibited steady growth in maize prices, with retail prices peaking at USD 531/MT in the second week of July. Wholesale prices rose gradually from USD 387/MT in early June to USD 429/MT in mid-July before a slight drop to USD 423/MT. This pattern suggests strong internal demand, possibly driven by urban consumption and delayed local harvests (Ministry of Agriculture, Kenya, 2025). In contrast, Uganda showed a consistent downward trend. Wholesale maize prices fell from USD 421/MT in early June to USD 302/MT by late July—a 28% decline, indicative of harvest influxes or reduced cross-border demand. Retail prices also dipped steadily from USD 459/MT to USD 345/MT. This aligns with reported bumper harvests in Northern Uganda during the period (Uganda Bureau of Statistics [UBOS], 2025). Rwanda saw moderate volatility. Wholesale prices fluctuated slightly, peaking at USD 417/MT in early July before falling back. Retail prices, however, stabilized around USD 417/MT during mid-July, likely reflecting imported maize from Uganda mitigating domestic shortages. Despite minor week-to-week shifts, prices remained above the July 2024 levels, pointing to persistent supply-side constraints (National Institute of Statistics of Rwanda [NISR], 2025). Tanzania's wholesale maize prices remained the lowest across the region, ranging from USD 304/MT to USD 329/MT. The marginal rise in late July suggests regional demand pressure, particularly from Rwanda and Kenya. Tanzanian grain has been known to flow into regional markets due to favorable production in Iringa and Mbeya zones (Tanzania Agricultural Board, 2025).

Figure 1: Average wholesale and retail price of maize in East Africa (June 2025 - July 2025)



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

Additionally, in Table 1, Uganda recorded the most substantial year-on-year price increases, particularly at the wholesale level. Between July 2024 and July 2025, wholesale maize prices surged by 93.2%, rising from USD 217/MT to USD 382/MT. Retail prices followed a similar pattern, increasing by 81.4% over the same period. In 2024, favorable weather conditions combined with non tarrif barriers by neighbouring South Sudan and Kenya led to excess supply within the country and subsequently lower prices. However, both levels saw sharp month-on-month declines from June to July 2025—8.9% at retail and −9.9% at wholesale. These fluctuations reflect Uganda's bimodal rainfall pattern, where July coincides with the end of the first major harvest season. As supply increased, prices temporarily dropped. Yet, the steep annual rise reveals the cumulative impact of drought shocks in late 2024, increased transport costs, and inflation, especially in border towns like Busia and Arua, where cross-border trade with Kenya and South Sudan exerts pressure on local supply (Farmgain Africa, 2025; ACSA Uganda, 2025).

In Kenya's maize prices increased modestly over both periods. Retail prices rose by 2.6% from June to July 2025 and by 25.3% year-on-year. Wholesale prices increased by 3.6% month-on-month and 36.1% year-on-year, from USD 300/MT to USD 423/MT. These steady increases are consistent with below-average rainfall in Kenya's Rift Valley maize belt and rising production costs. However, Kenya's relatively strong road networks and storage facilities helped stabilize retail supply, preventing erratic price swings seen in Uganda (FEWS NET, 2025).

Rwanda's maize markets showed modest monthly changes but marked annual inflation. From June to July 2025, prices rose 1.3% at retail and 2.3% at wholesale. Annually, retail prices increased 36.2%, and wholesale prices grew by 53.3%. Rwanda relies significantly on imports from Uganda and Tanzania. Consequently, price volatility in neighbouring countries affects their domestic markets. The July 2025 increases may also reflect currency depreciation and regional trade tightening, further inflating import-dependent staple goods (Ministry of Trade and Industry Rwanda, 2025).

Tanzania exhibited the most stable pricing environment, with only 2.6% month-on-month growth at wholesale and a year-on-year increase of 5.8%. Strong harvests in the Southern Highlands and strategic buffer stock policies enabled Tanzania to maintain supply resilience even amid regional price shocks.

Tanzania's government has also been actively involved in monitoring grain exports and maintaining reserves, limiting the price impact of regional export demands (FAO Tanzania, 2025).

Table 1: Changes in average monthly retail and wholesale price of maize in East Africa for June 2025 – July 2025

Country	Market Levels	Monthly Average Prices June 2025 (USD/MT)	Monthly Average Prices in July 2025 (USD/MT)	% Change June 2025 & July 2025	Monthly Average Prices July 2024 (USD/MT)	% Change July 2024 & July 2025
Kenya	Retail	502	516	2.6%	401	25.3%
Uganda	Retail	458	421	-8.9%	253	81.4%
Rwanda	Retail	398	403	1.3%	292	36.2%
Kenya	Wholesale	408	423	3.6%	300	36.1%
Uganda	Wholesale	420	382	-9.9%	217	93.2%
Tanzania	Wholesale	309	317	2.6%	292	5.8%
Rwanda	Wholesale	363	372	2.3%	237	53.3%

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)

Uganda

Between June and July 2025, wholesale prices of staple foods across major Ugandan markets exhibited a mixed trend. Prices remained mostly stable in June, then declined notably in July (Chart 2).

In Masindi, prices steadily fell from USD 414/MT in Week 1 of June to USD 391/MT in Week 3, before slightly rising to USD 392/MT in Week 4. In July, prices initially stabilized between USD 394 and USD 382 per MT but then collapsed to USD 274/MT in Week 4. Masindi, located in Uganda's mid-western agricultural zone, is known for its production of maize and beans. The stability in early July suggests steady demand and effective local storage practices. The sharp decline in Week 4 likely indicates an oversupply resulting from regional inflows or weakened local demand after the harvest. According to Farmgain Africa (2025), western Uganda often experiences a surge in supply around July, which tends to lower prices due to limited storage infrastructure.

In Kampala, prices in June were relatively stable, fluctuating between USD 431/MT and USD 438/MT. In July, prices peaked at USD 439/MT in Week 2 before declining, dropping to USD 327/MT by Week 4. As Uganda's capital and a key redistribution hub, the mid-month price rise in Kampala likely reflected increased urban demand. The sharp decline at the end of July may have been due to an influx of cheaper produce from surrounding rural areas and regional traders clearing their stocks. Prices in Kampala generally drop in July because of large supplies of harvested crops from Luwero, Masaka, and Mubende (Farmgain Africa, 2025).

In Kabale, prices remained high in June, averaging USD 482 to USD 492 per MT. In July, they slightly decreased from USD 493 in Week 1 to USD 455 in Week 3, followed by a sharp decline to USD 354 in Week 4. Kabale, located in southwestern Uganda, often reports higher prices due to terrain-related transport costs and smaller production volumes. Prices in this region linger longer than in others, likely because of delayed harvests and logistical challenges. ACSA Uganda (2025) notes that Kabale markets tend to maintain price premiums due to their location in highland zones with limited mechanization.

In Gulu, prices in June fell from USD 406/MT to USD 399/MT, then rose slightly to USD 405/MT, while steadily decreasing from between USD 414/MT and USD 301/MT in July. Located in Northern Uganda, Gulu serves as a cross-border trade route to South Sudan. Prices in early July were supported by trade and localized food shortages. The decline in Week 4 may reflect easing regional demand or reduced export flows due to border checks. Food prices in Northern Uganda are often influenced by the political situation in South Sudan and border trade disruptions (ACSA Uganda, 2025).

In Lira, prices declined from USD 392/MT to USD 380/MT, showing a minor bump in Week 4 of June. Similarly, in July, prices fell from USD 391/MT to USD 278/MT by Week 4. As a major cereal market, Lira's prices are particularly sensitive to harvest periods. The continuous drop in July aligns with the region's harvests and decreased external market pressure. Lira's role as a collection center for maize and simsim often leads to post-harvest price drops (Farmgain Africa, 2025).

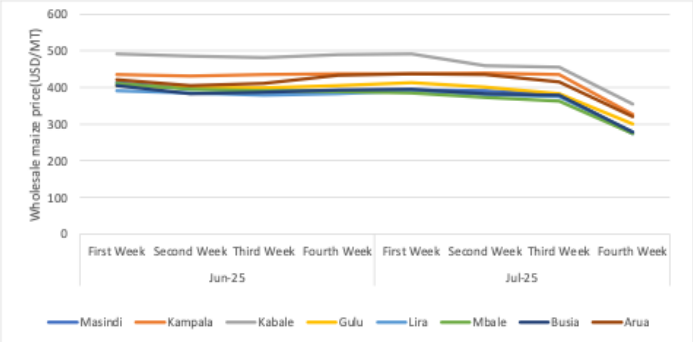
In Mbale, prices steadily fell from USD 411/MT to USD 390/MT in June and continued decreasing to USD 275/MT by Week 4. Prices in Eastern Uganda's Mbale experience volatility due to high rural production combined with limited storage facilities. The decline in July suggests a possible supply surplus following the harvest or an influx from Kapchorwa and Sironko. Mbale frequently encounters market saturation after the harvest, which reduces prices during July and August (ACSA Uganda, 2025).

In Busia, prices in June fluctuated slightly between USD 383/MT and USD 405/MT, rising in Week 4. However, in July, prices trended downward from USD 396/MT to USD 279/MT. As a key border town, Busia's prices are heavily influenced by demand from Kenya. The price increase in late June may reflect regional exports, while the July decline could indicate reduced external demand or increased cross-border supply. Cross-border trade with Kenya via Busia significantly affects pricing; higher demand raises prices, while border closures or export restrictions lead to declines (Farmgain Africa, 2025).

In Arua, prices increased from USD 405/MT to USD 433/MT in June, peaked at USD 438/MT in July, then fell to USD 321/MT. West Nile's Arua is influenced by trade with DR Congo and South Sudan. Prices were high in early July due

to cross-border cereal shortages. The decline at the end of July may relate to regional harvests or reduced demand from refugees. Arua serves as a regional food hub for refugee settlements, where supply shocks and fluctuations in humanitarian aid often impact wholesale markets (ACSA Uganda, 2025).

Figure 2: Average weekly retail prices of maize in selected markets in Uganda (June – July 2025)

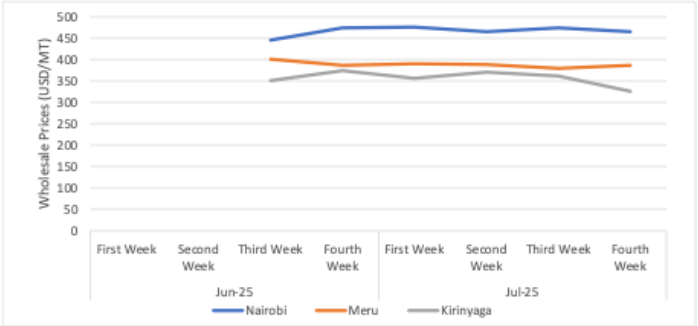


Source: Authors' construction using data from the Daily Market Traders Survey for Uganda.

Kenya

In Chart 3, Nairobi, Kenya's capital and primary urban consumption centre, saw a relatively stable price trend over the observation period. In June, prices rose from USD 444/MT (Week 3) to USD 474/MT (Week 4), and in July, they peaked at USD 476/MT (Week 1) before a gradual decline to USD 464/MT (Week 4). This fluctuation (ranging between USD 444/MT to USD 476/MT) suggests that Nairobi experienced short-term supply boosts—possibly from harvest zones in Rift Valley—followed by price stabilization due to consistent consumer demand and strong supply chain logistics. Nairobi's dependence on external sources makes it sensitive to rural harvesting patterns but buffered by efficient distribution networks (Tegemeo Institute, 2025). In Meru, an important highland production zone, maize prices were notably stable, fluctuating within a narrow range. In June ranged from USD 400/MT (Week 3) to USD 387/MT (Week 4), while in July, they ranged from USD 389/MT – USD 378/MT. The USD 22/MT drop across six weeks (from USD 400/MT to USD 378/MT) highlights local supply confidence and steady distribution from farms to local depots. Meru typically harvests earlier than most parts of Kenya, allowing early access to fresh stocks, which tempers mid-year market pressure (FAO Kenya, 2025). Lastly, Kirinyaga displayed the most volatile trend among the three markets. In June, prices rose sharply from USD 349/MT (Week 3) to USD 373/MT (Week 4) while in July they dropped to USD 355/MT, and spiked to USD 369/MT in Week 2, then fell sharply to USD 324/MT in Week 4. Kirinyaga's price behaviour reflects its status as a smaller-scale market with localized production and limited storage capacity. Price shocks may result from short harvest gaps, localized supply imbalances, or rapid offloading by smallholder farmers. The 13% drop from Week 2 to Week 4 in July illustrates this sensitivity (Ministry of Agriculture, Kenya, 2025).

Figure 3: Average weekly retail prices of maize in selected markets in Kenya (June – July 2025)

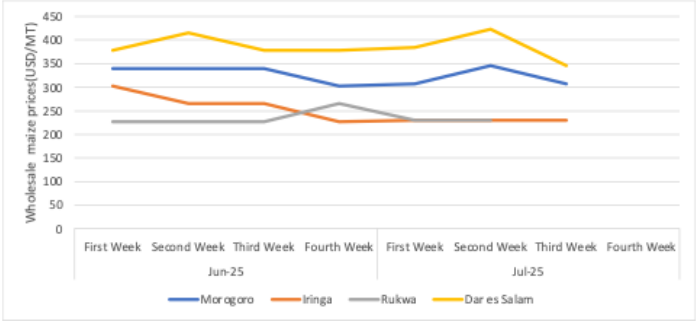


Source: Authors' construction using data from the Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya.

Tanzania

In Chart 4, Morogoro's wholesale prices exhibited slight volatility. In June 2025, prices remained constant at USD 340/MT for the first three weeks, then declined to USD 302/MT in Week 4. In July 2025, prices rebounded to USD 307/MT (Week 1), rose to USD 346/MT (Week 2), then dropped again to USD 307/MT (Week 3). Morogoro, serving as a redistribution hub, reflects movements of maize from the Southern Highlands to urban markets. The June price drop correlates with increased local supply post-harvest, while July's fluctuations likely result from demand surges linked to cross-regional trade and speculative holding by traders (Ministry of Agriculture Tanzania, 2025). In Iringa's prices dropped significantly between June's first and second weeks but stabilized thereafter. For instance, in June, prices dropped from USD 302/MT (Week 1) to USD 265/MT in Weeks 2 and 3, then further down to USD 227/MT (Week 4). In July 2025, they settled at USD 231/MT consistently through the first three weeks. As a key production zone, Iringa benefits from robust local harvests and low logistical costs. The stable prices from late June into July indicate minimal external market shocks, showcasing Iringa's role as a domestic supply buffer (FAO Tanzania, 2025). In Rukwa, another major maize-producing region, prices showed remarkable price consistency. In June 2025, prices were steady at USD 227/MT for three weeks, then rose to USD 265/MT in Week 4. In July 2025, Prices stabilized at USD 231/MT across the first two weeks. Rukwa's isolated location and lower integration into national trade networks contribute to its price stability. The Week 4 June uptick reflects marginal redistribution efforts, but prices quickly normalized, underscoring supply sufficiency (SAGCOT, 2025). Dar es Salaam, as Tanzania's largest urban centre, displayed dynamic pricing patterns. In June, prices ranged from USD 378/MT in Weeks 1, 3, and 4, peaking at USD 416/MT (Week 2). While in July, they increased to USD 384/MT (Week 1), peaking again at USD 423/MT (Week 2), then dropped to USD 346/MT (Week 3). These price shifts align with fluctuations in urban demand and intermittent supply bottlenecks from up-country markets. The Week 2 peaks suggest periods of speculative trading or temporary supply chain lags. The sharp Week 3 drop reflects the influx of new supplies from interior regions (Tanzania Market Intelligence Unit, 2025).

Figure 4: Average weekly retail prices of maize in selected markets in Tanzania (June – July 2025)



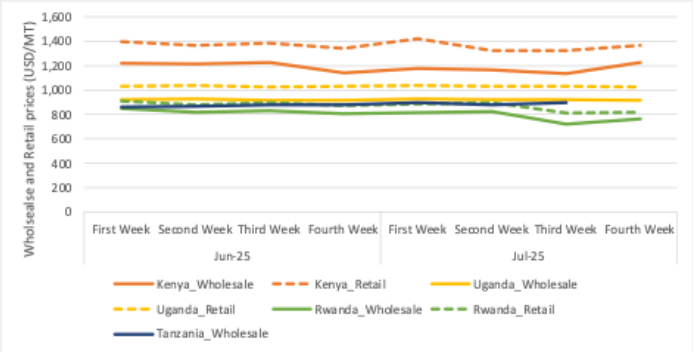
Source: Weekly Market Bulletin, Ministry of Agriculture, Tanzania

Changing Rice Prices in East Africa

While Kenya and Tanzania experienced relatively stable trends with mild fluctuations, Uganda and Rwanda exhibited more volatile intra-month changes, particularly in wholesale markets (Chart 5). Kenya displayed modest fluctuations across both wholesale and retail rice prices. Wholesale prices ranged from USD 1,143/MT – USD 1,225/MT in June, showing a slight dip in the fourth week. In July, the range was USD 1,133/MT – USD 1,223/MT, ending the month on a higher note. The retail prices were slightly more stable, ranging from USD 1,341/MT – USD 1,420/MT, peaking in early July. The relative price stability in Kenya, particularly in urban centers, reflects efficient market systems and strong supply chain integration between surplus regions (e.g., Rift Valley) and urban hubs (Tegemeo Institute, 2025). Uganda showed mixed trends. The wholesale prices fluctuated between USD 915/MT and USD 927/MT, indicating mild volatility. Retail prices remained within USD 1,027/MT – USD 1,037/MT, suggesting stable consumer-level pricing. Despite wholesale variability, Uganda's retail prices remained relatively stable, pointing to robust consumer demand and possibly price cushioning by retailers. Supply constraints or speculative wholesale trading may explain the intermittent weekly shifts (Ministry of Agriculture, Uganda, 2025). In Rwanda, price movements were notably volatile. Wholesale prices dropped from USD 846/MT (Week 1, June) to USD 722/MT (Week 3, July) before partially recovering to USD 765/MT in late July. Retail Prices fell from USD 908/MT to USD 810/MT, with a minor rebound in the final week. These trends reflect localized supply shortages or shifts in cross-border trade, particularly with Uganda and the DRC. Rwanda's smaller market size and reliance on imports can exacerbate volatility (Rwanda Ministry of Trade and Industry, 2025). The third-week price dip suggests a temporary surplus or influx from neighbouring countries.

In Tanzania, experienced a gentle upward trend in wholesale prices from USD 858/MT (June Week 1) to USD 896/MT (July Week 1), then stabilized at USD 880/MT and USD 895/MT. This trend likely reflects post-harvest redistribution and improved market access. Dar es Salaam's urban demand, coupled with inland production from Iringa and Rukwa, explains the gradual uptick and later plateau (FAO Tanzania, 2025).

Figure 5: Weekly average wholesale and retail prices of rice in East Africa (June – July 2025)



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.

In Kenya, retail prices decreased by 0.9%, from USD 1,372/MT in June to USD 1,359/MT in July 2025, although this reflects a year-on-year increase of 5%. Wholesale prices declined by 2.2%, falling from USD 1,200/MT to USD 1,174/MT, yet showed an 8% increase compared to July 2024. These trends in Kenya's rice markets indicate a cooling off of prices following sustained increases earlier in the year. The month-on-month decline may suggest adequate stock levels or reduced consumer demand, while the year-on-year rise implies underlying structural pressures on supply and a greater reliance on imports (Tegemeo Institute, 2025).

In Uganda, retail prices experienced a slight increase of 0.2%, rising from USD 1,030/MT to USD 1,032/MT, with a significant annual increase of 25%. Wholesale prices also had a marginal gain of 0.1%, moving from USD 920/MT to USD 921/MT, despite a 24% increase compared to July 2024. This strong year-on-year growth in Uganda reflects higher demand, possibly due to reduced domestic production or increased import costs. While the monthly price movements are stable, the steep annual gains could strain household food budgets, particularly among lower-income populations (MAAIF Uganda, 2025).

In Rwanda, retail prices fell by 2.2%, decreasing from USD 889/MT to USD 870/MT, with a 6% decline year-on-year. Wholesale prices dropped by 2.9%, going from USD 825/MT to USD 802/MT, but increased by 6% compared to the previous year. July 2025 saw the sharpest price declines in Rwanda. The negative month-on-month changes across both retail and wholesale markets could be attributed to increased supply and surging imports. However, the positive annual change in wholesale prices suggests rising upstream costs that retailers may not be fully passing on to consumers, likely in an effort to remain competitive (MINICOM Rwanda, 2025).

In Tanzania, wholesale prices rose by 2.3%, from USD 870/MT to USD 890/MT, despite an 8% year-on-year decline. This monthly increase may reflect short-term supply constraints or heightened export demand, particularly from Uganda or Rwanda. Nevertheless, the annual price drop indicates that prices remain well below 2024 levels, likely due to higher production or reduced export tariffs earlier in the year (FAO Tanzania, 2025).

Table 2: Monthly retail and wholesale price changes of rice in East Africa (June 2025 – July 2025, July 2024, and July 2023)

Country	Market Levels	Monthly Average Prices June 2025 (USD/MT)	Monthly Average Prices July 2025 (USD/MT)	% Change June & July 2025	Monthly Average Prices July 2024 (USD/MT)	% Change July 2024 & July 2025
Kenya	Retail	1372	1359	-0.9%	1311	5%
Uganda	Retail	1030	1032	0.2%	825	25%
Rwanda	Retail	889	870	-2.2%	942	-6%
Kenya	Wholesale	1200	1174	-2.2%	1109	8%
Uganda	Wholesale	920	921	0.1%	742	24%
Tanzania	Wholesale	870	890	2.3%	942	-8%
Rwanda	Wholesale	825	802	-2.9%	777	6%

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

In Chart 6, we analyze the weekly price movements of various imported rice varieties in the East African region, focusing on Uganda, Kenya, and Rwanda.

In Uganda, the wholesale prices of Pakistani rice decreased from USD 1,140/MT in early June to USD 1,112/MT by the end of July, representing a total decline of approximately 2.8% over the eight weeks. Similarly, retail prices dropped from USD 1,275/MT in early June to USD 1,243/MT by late July, representing a 2.5% decline during the same period. This consistent decrease in both wholesale and retail prices for Pakistani rice suggests either increased availability or reduced import costs, possibly due to global supply normalization following harvest periods or favourable exchange rates (appreciating Uganda shilling). Traders may also be

discounting older stocks in anticipation of new shipments (FAO, 2025).

In contrast, the prices of rice imported from Tanzania into Uganda remained relatively stable with only minor fluctuations. For example, wholesale prices started at USD 1,167/MT in early June and rose slightly to USD 1,169/MT by late July, representing a net change of about 0.2%. Retail prices began at USD 1,314/MT and ended at USD 1,315/MT, showing a total shift of about 0.08%. This indicates stability in the market for Tanzanian rice, as the consistent retail pricing, despite minor wholesale fluctuations, suggests that retailers may have absorbed slight cost changes to maintain consumer loyalty or to compete effectively (MAFAP, 2025).

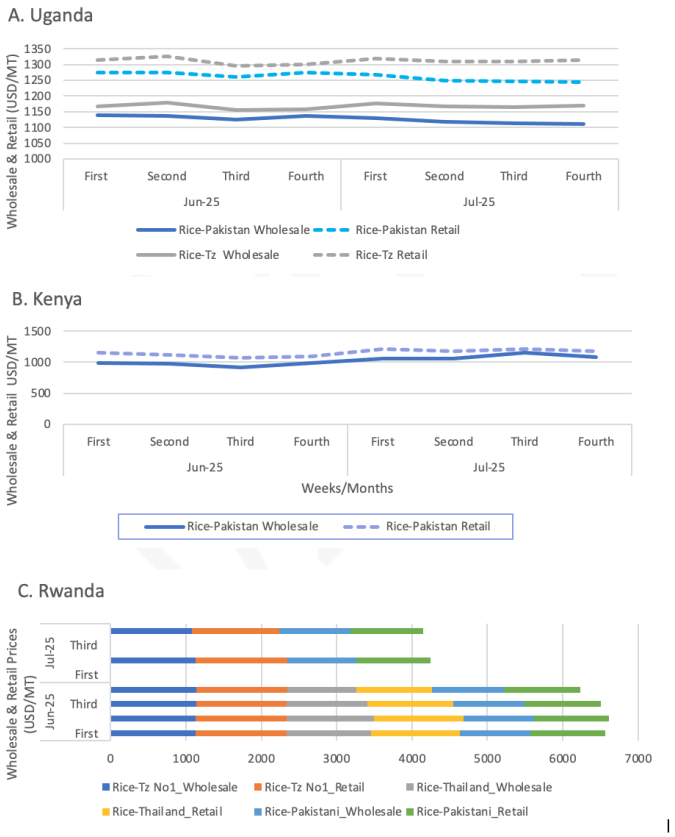
In Kenya, wholesale prices sharply declined during June, reaching a low of USD 920/MT by the third week, before recovering to USD 988/MT by the end of the month. In July, prices surged to a peak of USD 1,153/MT in the third week, representing an approximate 25% increase from June's lowest point. This suggests a restocking cycle, likely triggered by tighter supply or increased import costs. Although retail prices followed the wholesale trends, they remained more stable. They dipped from USD 1,159/MT to USD 1,073/MT throughout June and then rose again in July, peaking at USD 1,216/MT. The dip in prices of imported rice varieties likely follows the appreciating Kenya shilling against the dollar (Chart 7) making imports cheaper. Retailers likely implemented buffering mechanisms such as stockpiling or gradual price markups to mitigate wholesale shocks.

In Rwanda, Tanzanian No. 1 rice exhibited stable pricing in June, with only marginal changes. However, a significant dip was observed in the fourth week of July, with a decline of 4.7% in wholesale prices and 4.3% in retail prices compared to the early part of July. This likely indicates reduced demand or a bulk arrival of cheaper imports (Tanzania Revenue Authority [TRA], 2025).

Thai rice prices experienced a sharp decline, particularly from the second to fourth week of June. Wholesale prices fell by 21.1% from Week 2 to Week 4, while retail prices dropped by 15.7%. This trend may indicate an overstock situation or a decline in consumer preference for Thai rice, possibly due to price increases or substitution with Pakistani rice.

In contrast, the prices of Pakistani rice displayed more resilience compared to Thai rice, exhibiting moderate volatility. Wholesale prices rose from USD 931/MT in early June to USD 956/MT by the end of June, before falling back to USD 913/MT by mid-July. Retail prices mirrored this trend, peaking in mid-June before declining again. This pattern aligns with stable demand and minor adjustments in imports.

Figure 6: Weekly average wholesale and retail prices of imported rice varieties in East Africa (June – July 2025)



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

Summary and Future Outlook

Maize prices in East Africa reflect harvest cycles and cross-border trade. Uganda experienced sharp price declines (up to 28% at wholesale) from early June to late July due to new harvests, particularly from Northern Uganda. In contrast, Kenya saw steady price increases, indicating reduced local supply. Tanzania maintained stable and low prices, benefiting from harvest surpluses that allowed for exports to deficit areas like Rwanda and Kenya. Rwanda's maize prices remained stable or slightly increased, highlighting its reliance on imports, especially from Uganda. This illustrates the region's integrated maize market, where surpluses in one country help stabilize prices in others, playing a crucial role in food security for landlocked nations like Rwanda.

Rice prices are less volatile but significantly influenced by imports and currency trends. In Kenya, a large portion of the rice supply comes from imports (mainly from Pakistan

and Thailand), with prices determined by import costs like exchange rates and freight charges. Uganda and Rwanda also rely on imports, with Uganda experiencing stable prices and Rwanda seeing price deflation. Tanzania, as a key regional exporter, faced mild price increases due to rising external demand. Overall, the rice market is more globalized than the maize market, with price fluctuations largely driven by international trade conditions rather than local factors.

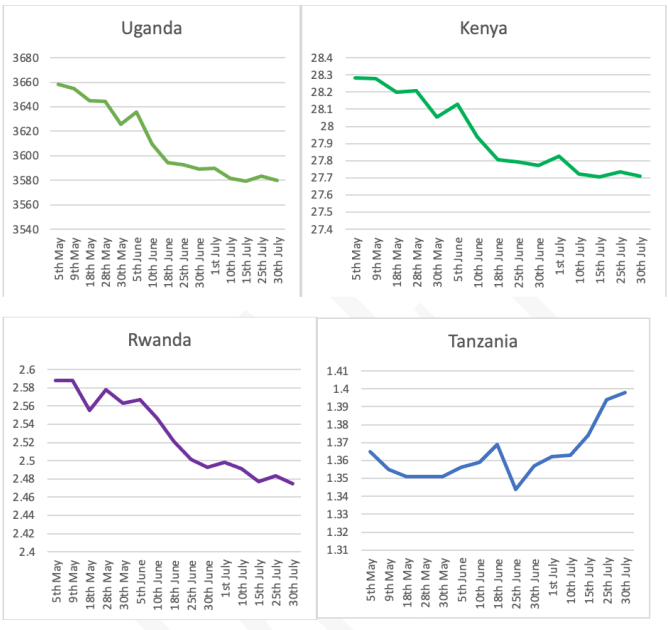
International market trends are slowly impacting prices. From June to July 2025, Pakistani and Thai rice prices fell by up to 10%. However, in East Africa, particularly Uganda and Rwanda, prices for Pakistani rice remained high or even increased due to delays in price transmission linked to import bottlenecks, long supply chains, currency depreciation, and trade policy barriers.

Tanzania is emerging as a price stabilizer for maize and rice, consistently recording the lowest wholesale prices for both staples. Its strategic location and production surplus position it as a regional supplier. Marginal price increases indicate effective supply chains and a favourable food balance. This highlights Tanzania's critical role in regional food security and its potential for structured grain trade, warehousing, and buffer stock creation, as well as increased export earnings through improved logistics and trade.

In Uganda, maize prices are likely to remain low or stabilise due to the tail end of the main harvest in the north. However, rising regional demand (especially from Kenya and Rwanda) may exert upward pressure on local prices. In Kenya, we expect continued high prices through August and September, particularly in urban markets, due to delayed domestic harvests and import dependence. Prices may ease slightly by October with the start of the short rainy season harvest in marginal areas. In Tanzania, maize prices are expected to remain stable to moderately rising, especially as cross-border exports to Kenya and Rwanda increase. Surpluses will likely keep prices below regional averages. Rwanda, being dependent on imports from Uganda and Tanzania, maize prices may increase modestly if import flows slow due to seasonal tightening or policy constraints.

Global rice prices are likely to soften further, particularly for Pakistan and Thai rice, due to strong global harvests and reduced export restrictions. The appreciation of the currency for Uganda, Kenya and Uganda showing the trends in the past three months suggests the likelihood of prices declining or remaining relatively stable with minimal sharp increases. Appreciation of the local currencies in the three countries is due to both domestic and international factors including prudent monetary policies, increased exports and fundamentally, the weakening of the dollar against hard currencies across the World . However, transport costs and import duties may remain a hindrance. In Tanzania, the domestic production will help keep prices relatively stable, despite its depreciating currency and it will continue to serve as a key rice exporter within the region.

Figure 7: Trends in exchange rate of local currencies and the USD



Source: Bank of Uganda website

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 System [2] sourced for the Ministry of Agriculture Livestock Fisheries and Co-operatives (MALF) for Kenya, and e-Soko (3)[3]

[1] The Food Security Portal data for East African countries is from the Regional Agricultural Trade Intelligence Network (RATIN) and is available at food price monitoring Africa weekly average - dataset - ckan (foodsecurityportal.org)

[2] Ministry of Agriculture Livestock Fisheries and Co-operatives, Kenyan Market Information System. Data available via http://amis.co.ke/site/market/900?product=1&per_page=100

[3] e-SOKO price data is available from the Ministry of Agriculture and Animal Resources of the Republic of Rwanda: http://www.esoko.gov.rw/esoko/Dashboard/Login.aspx?DashboardId=4&dash=true&Login=true

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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