



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

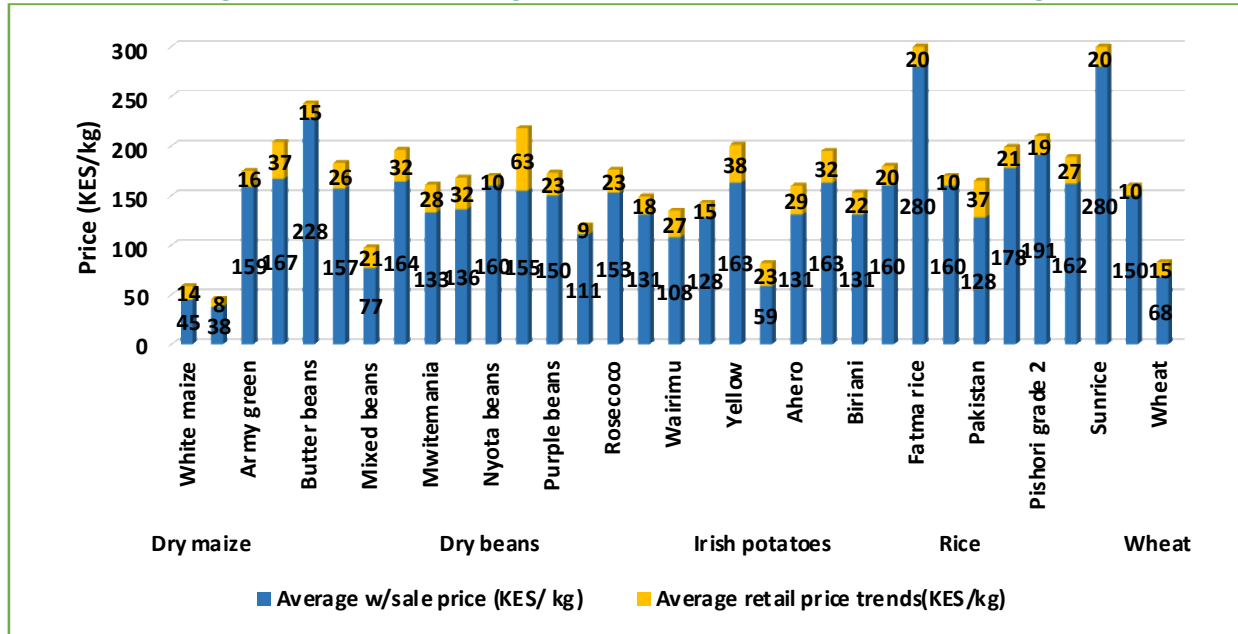
- ▶ Price increases in densely populated areas are driven by several factors: increased demand, scarcity, and presence of intermediaries.
- ▶ The decreasing and stable prices for most commodities are due to the availability from neighboring counties and countries like Tanzania and Uganda.
- ▶ The significant reduction in Irish potato prices in most regions is due to the seasonal availability of the crop.
- ▶ Stability and reduction of both wholesale and retail prices for commodities can be attributed to high demand and scarcity of the commodity, while stability and decreasing prices could be due to availability, reduction in pump price, and continued strengthening on Kenyan Shilling against the dollar.

Overall Wholesale and Retail Prices for May

In May 2024, Figure 1 shows the average wholesale and retail prices of maize, beans, potatoes, rice, and wheat in major Kenyan markets. Most commodities experienced price margins ranging from 2% to 15%. For instance, various types of dry beans, such as Army Green, Butter, Nyota, Purple, Red Kidney, Rosecoco, Saitoti, and Alulu, had margins between 4% and 15%. Rice varieties like Falcon, Fatma, Mpunga, Pishori, Sunrice, and Tamtam had

margins of 7% to 13%, while dry white maize and certain bean types exhibited margins of 17% to 23%. Moreover, commodities like white dry maize, Pinto beans, mixed beans, Pakistan rice, and Shangi Irish potatoes had higher price margins, ranging from 27% to 41%. These variations in pricing margins can be attributed to factors such as high fuel and transportation costs, seasonal fluctuations, and increased local demand.

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



Source: Daily Market Survey for the month of May 2024

Wholesale and Retail Commodity Prices

Diverse types of beans were found across different regions. Green Yellow, Wairimu, Mwiternania, Nyayo, and Black beans (Njahi) were available in all selected areas. Army Green and Saitoti beans were common everywhere except Kisumu and Nyeri, while Rosecoco beans were found in all regions except Nyeri. Some bean varieties were specific to certain regions: Nyota was only available in Eldoret, Mixed beans in Nakuru, Pinto beans in Kisumu, Red Kidney beans in Nakuru and Kisumu, and yellow beans in Eldoret and Kisumu. Eldoret and Nakuru reported the highest accessibility to bean varieties due to their status as major producing regions in the country. As expected, retail prices for all bean varieties were higher than wholesale prices. Compared to the national wholesale average prices, wholesale prices for most bean varieties were higher in Eldoret, Mombasa, and Nairobi, while retail prices were higher in Eldoret and Kisumu. Notably, Nakuru had lower wholesale and retail prices due to the availability of beans, as most farmers harvested their crops in April. Price disparities across regions can be attributed to market dynamics such as supply and demand, the presence of intermediaries, and increased transportation expenses due to rising fuel prices.

All regions reported the availability of dry white maize. Eldoret and Mombasa showed higher wholesale prices, at 47 KES/kg and 75 KES/kg respectively, compared to the

national average wholesale price of 45 KES/kg. Additionally, Mombasa, Nairobi, and Nyeri recorded higher retail prices of 75 KES/kg, 63 KES/kg, and 69 KES/kg respectively, compared to the national average retail price of 59 KES/kg. The high maize prices in Eldoret, Mombasa, Nairobi, and Nyeri can be attributed to scarcity due to seasonality and high demand.

In Nairobi and Mombasa, Irish potatoes commanded higher prices at 92KES/kg and 61KES/kg respectively, compared to the national average wholesale price of 59KES/kg. Similarly, Mombasa, Nairobi, and Kisumu recorded notably higher retail prices of 83KES/kg, 104KES/kg, and 95KES/kg respectively, in contrast to the national average price of 82KES/kg. These price increases in densely populated areas can be attributed to several factors, including increased demand, scarcity of the commodity due to its perishable nature, the presence of intermediaries, and rising transportation costs fueled by higher fuel prices.

All regions reported the availability of Biriani and Pishori rice, with Basmati rice being common in all regions except Mombasa, while Sindano rice was found in all regions except Nairobi. Additionally, Mombasa featured varieties such as Fatma, Tamtam, Mpunga, and Sunrice, while Eldoret offered Falcon and Kisumu had Ahero and Pakistan rice. Eldoret and Kisumu experienced higher retail and wholesale prices for most common rice varieties. These elevated prices are attributed to heavy reliance on the international market to meet consumption demands, resulting in increased prices due to importation expenses.

As per the Famine Early Warning Systems Network report of April 2024, Tanzania emerges as a significant rice producer and source within the region, whereas Kenya and Uganda play smaller roles in production, largely relying on imports from Tanzania.

Elevated retail prices for wheat were reported in Eldoret, Kisumu, and Nairobi at 97KES/kg, 90KES/kg, and 90KES/kg respectively, surpassing the country's average of

81KES/kg for dry wheat. Similarly, wholesale prices in Eldoret (90KES/kg) and Nairobi (72KES/kg) exceeded the national average of 83KES/kg. Given the heavy reliance on imports to fulfill domestic wheat demand and associated export costs, the availability and pricing of wheat are susceptible to fluctuations in international trade dynamics, potentially leading to price hikes.

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

Product	Variety	Average w/sale price (KES/ kg)						Average retail price (KES/kg)						Total average /sale price (KES/ kg)	Total average retail price (KES/ kg)
		Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri		
Dry beans	Army green	180		180	167	111		190		185	190	135		159	175
	Black beans (Njahi)	200	159	160	169	154	16	250	250	170	190	158	20	167	204
	Butter beans	250			233	201		300			236	193		228	243
	Green/yellow	180	173	165	161	117	14	190	230	170	184	140	18	157	183
	Mixed beans					77						98		77	98
	Mwezi moja	170	160		164			180	217		190			164	196
	Mwitmania	170	154	140	150	95	89	180	197	150	172	98	17	133	161
	Nyayo	150	152	165	145	105	10	160	190	170	180	129	17	136	168
	Nyota beans	160						170						160	170
	Pinto beans		155						218					155	218
	Purple beans		155	145					200	150				150	173
	Red kidney		158			103			200			105		111	120
	Rosecoco	170	151	170	164	110		180	207	180	188	125		153	176
	Saitoti	170		125	158	88		180		150	180	105		131	149
Wairimu	100	140	135	98	94	83	125	178	140	120	99	15	108	135	
White Rosecoco (Alulu)	170		75			14	180		80			18	128	143	
Yellow	175	151					180	222					163	201	
Dry maize	White maize	47	38	75	41	34	33	57	48	75	63	46	69	45	59
Irish potatoes	Shangi	59	49	61	92	37	54	59	95	83	104	79	69	59	82
Rice	Ahero		131						160					131	160
	Basmati	190	187		135	156	14	220	250		150	180	17	163	195
	Biriani	155	135	130	95	135	13	175	155	140	120	150	17	131	153
	Falcon	160						180						160	180
	Fatma rice			280						300				280	300
	Mpunga			160						170				160	170
	Pakistan		130				12		170				15	128	165
	Pishori grade 1	200		200	192	153	17	230		220	207	170	19	178	199
	Pishori grade 2	200	182					220	200					191	210
	Sindano	190	174	160		153	14	200	232	170		180	17	162	189
	Sunrice			280						300				280	300
Tamtam			150						160				150	160	
Wheat	Wheat	90	67	60	72	58	59	97	90	75	90	67	80	68	83

Wholesale and Retail Price Trends by Region

During the first week and weeks two through four, price fluctuations were observed across regions. In Eldoret, most commodities maintained stable prices for both wholesale and retail markets. Specifically, all varieties of dry beans and available rice maintained stable prices. Dry wheat had a stable wholesale price trend, with a slight 1% reduction in retail prices. Maize saw a decrease of 9% in wholesale prices and 8% in retail prices. Shangi Irish potatoes experienced significant reductions, with wholesale prices dropping by 12% and retail prices by 29%. The stability in most food commodity prices in Eldoret is due to a consistent supply from the region itself, neighboring areas, and imports from countries like Uganda, Tanzania, and Pakistan. The reduction in maize prices is caused by increased availability as farmers in the breadbasket region, who had stockpiled the staple for months anticipating higher prices, were forced to sell, resulting in a surplus and lower prices. The significant reduction in Irish potato prices is attributed to the availability of the crop from the neighboring County of Elgeyo Marakwet, the major producing region.

In Kisumu, there were varying price trends for commodities when comparing week 1 to week 4. Most commodities showed decreasing retail prices, including dry beans (Mwezi Moja, Mwitmania, Nyayo, Purple, Rosecoco, Wairimu, and yellow beans), with reductions ranging from 0.5% to 8.7%. Rice varieties such as Biriani (1.7%) and Pakistan (20%) also experienced price decreases, while dry white maize and dry wheat saw decreases of 10% and 9%, respectively. Some commodities, like Pinto beans (8%), dry yellow maize (10%), and Sindano rice (3%), saw increasing retail prices. On the other hand, black beans (Njahi), green yellow beans, and certain rice varieties (Ahero, Basmati, and Pishori), as well as dry wheat, had stable prices. The decreasing and stable prices for most commodities are due to the availability from neighboring counties and countries like Tanzania and Uganda.

In Mombasa, a comparison of wholesale and retail prices between weeks 1 and 4 reveals that prices for various dry bean varieties, white maize, all types of rice, and wheat remained unchanged. This price stability can be attributed to imports from countries such as Tanzania, Uganda, and Pakistan, as well as the availability of food commodities from nearby producing regions. However, Irish potatoes saw a significant decrease in both wholesale and retail prices, with declines of 5% and 12%, respectively, due to the seasonal nature of the crop in the neighboring producing counties including Elgeyo Marakwet, Nakuru and Narok.

FOCUS ON RICE ACROSS SELECTED REGIONS

Rice currently ranks as the third most significant staple crop in Kenya, trailing behind maize and wheat. It serves as a viable alternative cereal, particularly favored by households in Arid and Semi-Arid Lands (ASAL) regions, to complement maize. Around 80% of Kenya's rice production takes place in irrigated areas established by both the government and local communities, while the remaining 20% is grown under rain-fed conditions. The primary cultivation hub for rice is the Mwea Irrigation Scheme in Kirinyaga County. However, it is also cultivated in various regions across the country, including Ahero in Kisumu County and Bunyala in Busia County. Due to its adaptability to diverse production environments, rice is cultivated in numerous counties, spanning Kirinyaga, Kisumu, Homa Bay, Migori, Meru, Embu, Tharaka Nithi, Isiolo, Marsabit, Busia, Kakamega, Bungoma, Turkana, Garissa, Elgeyo Marakwet, West Pokot, Baringo, Taita Taveta, Kilifi, Kwale, Tana River, Lamu, Siaya, and Murang'a.

In the primary production hub of Mwea, the main harvesting period occurs in November, while the ratoon harvest typically takes place in August. Over 100% of Kenya's rice is cultivated using irrigation systems, with a growth period of approximately three to four months for the crop to reach full maturity. Kenyan rice varieties include long-grain Sindano rice, medium-grain rice, and aromatic basmati rice, with Pishori being the most premium and commonly grown brand in the Mwea irrigation scheme and its extension areas.

Rice farming plays a crucial role in Kenya, significantly contributing to food security and serving as a vital income source for numerous smallholder farmers. Various types of rice, such as Pishori, Basmati, and Sindano, are traded across different regions. The predominant sources of traded rice include the Mwea irrigation scheme (Pishori grade 2 and Basmati), Tanzania (Pishori grade 1, Mpunga, and Sindano), Pakistan (Basmati, Biriani, Sindano, and TamTam), and the Ahero irrigation system (Ahero).

In most areas in May, the average retail and wholesale price of Pishori rice was higher in most regions including Eldoret, Mombasa, and Nairobi. Basmati and Biriani rice saw higher wholesale and retail prices in Eldoret and Kisumu. The country's dependence on imports, which leads to high import costs, high transaction costs, and high demand, may be the cause of the high pricing of specific rice types in these cities.

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

Variety	Average of wholesale price per kg						Average of retail price per 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		
Ahero	111						110						111	110
Basmati	150	147		155	156	143	229	200		150	150	174	163	155
Biriani	155	135	130	95	135	139	175	155	140	120	150	178	131	153
Pakistan	185						185						180	180
Famous rice		210						200					200	200
Mombasa			160					170					160	170
Pakistan		130				150						150	130	150
Pishori grade 1	200		200	192	153	179	230		220	207	179	197	178	199
Pishori grade 2	200		192				200						192	192
Sindano	150	174	150		153	141	200	232	170		150	172	162	150
Sourice			200										200	200
Tanzania			150							180			150	180

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

In the Nairobi region, when comparing wholesale and retail prices between weeks 1 and 4, stability, decreasing and increasing prices were reflected. Some dry beans saw

stable wholesale prices including army green beans, Black beans (Njahi), green yellow, and Mwitemania. Some commodities recorded slight increase in wholesale prices ranging between 2% and 7%, these included Nyayo beans, Wairimu beans, Basmati rice, Biriani rice, Pishori and dry wheat. Decreasing wholesale prices was recorded by butter beans (4%), Rosecoco (1.4%), white dry maize (13%), and Shangi Irish potatoes (5%). Stability and reduction of both wholesale and retail prices for commodities can be attributed to high demand and scarcity of the commodity, while stability and decreasing prices could be due to availability, reduction in pump price, and continued strengthening on Kenyan Shilling against the dollar.

A comparison of wholesale and retail prices in Nakuru between week 1 and week 4 revealed diverse price trends, including stability, increases, and decreases. Commodities that recorded increased wholesale prices included Army green (7%), black beans (6%), butter beans (3%), Rosecoco (8%), Wairimu (5%), and dry wheat (9%). Conversely, the wholesale prices for mixed beans and Mwitemania decreased by 6%, Saitoti beans by 3%, while Shangi Irish potatoes and white dry maize saw significant reductions of 15% and 40% respectively, attributed to a surplus of these commodities in the region. Green yellow beans and all available rice varieties maintained stable prices.

A comparison of prices between week one and week four in Nyeri revealed a mix of price increases, stability, and decreases across various food commodities. Wholesale prices decreased for black beans (2%), Shangi Irish potatoes (36%), Biriani rice (16%), Pishori rice (5%), Sindano rice (11%), and wheat (11%). Stable wholesale prices were observed for Mwitemania and Wairimu beans. In contrast, price increases were noted for green yellow beans (3%), white dry maize (1%), and Basmati rice (6%). These fluctuations in wholesale and retail prices are influenced by seasonal variations and market dynamics.

Comparison of National Average Prices between April and May

Comparing the overall national average prices for all commodities between April and May 2024, it is evident that most wholesale and retail prices remained steady or decreased (Table 2). Most commodities exhibited stable retail and wholesale prices, with fluctuations ranging from 3% to -3%. However, some experienced more substantial decreases, ranging from -4% to -10%, with a few showing significant declines of -15% to -30%. This trend is likely influenced by the ample availability of food commodities from various producing regions, supplemented by imports from neighboring East African countries and beyond, as well as the strengthening of the Kenyan Shilling.

Table 2: Comparison of April and May prices

Product	Variety	Average Wholesale Price (Kes/Kg)		Percentage change	Average Retail Price (Kes/Kg)		Percentage change
		April	May		April	May	
Dry maize	White maize	48	45	-7%	61	59	-3%
	Yellow maize	40	38	-5%	50	46	-9%
Dry beans	Army green	161	159	-1%	175	175	0%
	Black beans (Njahi)	164	167	2%	194	204	5%
	Butter beans	231	228	-1%	251	243	-3%
	Green/yellow	156	157	1%	186	183	-2%
	Mixed beans	85	77	-10%	105	98	-7%
	Mwezi moja	165	164	-1%	193	196	2%
	Mwitmania	136	133	-2%	162	161	-1%
	Nyayo	139	136	-2%	169	168	-1%
	Nyota beans	160	160	0%	170	170	0%
	Pinto beans	153	155	1%	216	218	1%
	Purple beans	151	150	-1%	174	173	-1%
	Red kidney	128	111	-15%	151	120	-26%
	Rosecoco	152	153	1%	175	176	1%
	Saitoti	136	131	-4%	161	149	-8%
	Wairimu	108	108	0%	139	135	-3%
White Rosecoco (Alulu)	140	128	-9%	171	143	-20%	
Yellow	175	163	-7%	180	201	10%	
Irish potatoes	Shangi	64	59	-8%	89	82	-9%
Rice	Ahero	124	131	5%	160	160	0%
	Basmati	163	163	0%	195	195	0%
	Biriani	135	131	-3%	157	153	-3%
	Falcon	160	160	0%	180	180	0%
	Fatma rice	280	280	0%	300	300	0%
	Mpunga	160	160	0%	170	170	0%
	Pakistan	120	128	6%	150	165	9%
	Pishori grade 1	176	178	1%	198	199	1%
	Pishori grade 2	188	191	2%	212	210	-1%
	Sindano	164	162	-1%	191	189	-1%
	Sunrice	280	280	0%	300	300	0%
Tamtam	150	150	0%	160	160	0%	
Wheat	Wheat	66	68	3%	84	83	-1%

Key	
<3 but >-3	Stable
>-4 but >-10	Decrease
>-11 but <-30	Significant decrease

Source: Daily Market Survey for the month May 2024

Outlook for the Month of June

In June 2024, the following changes are anticipated:

- **Potential Increase in Food Prices:** There is a possibility of high demand leading to higher food prices in the coming months due to recent floods, which have threatened to affect some grain supplies.
- **Gradual Decline in Staple Food Prices:** Maize prices are expected to continue their gradual decline. This trend is driven by average to above-average short rains harvest, unimodal production in the North Rift and western Kenya, and cross-border imports from Uganda and Tanzania.
- **General Price Decreases:** Favorable weather conditions, a reduction in pump prices, and the continued strengthening of the Kenyan Shilling against the dollar are contributing to overall decreases in prices.
- **Decrease in Prices of Beans and Maize:** Prices of beans and maize are expected to decrease due to increased supply from the Eastern region.

FOCUS ON NYERI REGION

Nyeri County, located in central Kenya, is one of the country's 47 counties, known for its diverse landscape of hills and fertile plains. The county's capital and largest town is Nyeri, a region recognized for its vibrant agricultural sector. According to the 2019 Kenyan population and housing census, Nyeri County has a population of 759,164, reflecting a 9.5% increase from the 2009 census. Agriculture is the cornerstone of the county's economy, with key activities including coffee and tea farming, dairy farming, horticulture, and livestock rearing, which serve as the primary sources of income for most residents.

The county's main food crops include maize, beans, wheat, bananas, Irish potatoes, sweet potatoes, and various vegetables. Agribusiness plays a crucial role in the local economy, with goods sourced directly from local farmers and neighboring counties. Crop prices are collected at the Karatina open-air market, East Africa's second-largest regional trade hub for wholesale and retail transactions. Located in Karatina Town, this market serves the majority of surrounding sub-counties and counties, offering a wide array of products such as fruits, vegetables, cereals, and other market goods.

In May, a comparison of prices from week 1 to weeks 2 to 4 revealed a mix of increases, stability, and decreases across various food commodities. Notably, Shangi Irish potatoes saw a significant decrease in wholesale and retail prices by 31% and 36%, respectively. This decline is attributed to the abundant availability of the crop from the nearby Nyandarua County, a major potato-producing region.

Table 3: Average Retail Prices, Nyeri Region

Product	Variety	Average wholesale price (KES/kg)				Total average wholesale price (KES/ kg)	Total average retail price (KES/kg)
		Week 1	Week 2	Week 3	Week 4		
Dry beans	Black beans(Ngahi)	156	156	167	168	161	203
	Green/yellow	139	139	154	156	145	186
	Mwitamania	89	89	89	89	89	170
	Nyayo	102	102	100	100	101	177
	Wairimu	81	82	84	84	83	150
	White Roseoco (Aluku)	144	144			144	188
Dry maize	White maize	32	32	35	35	33	69
Irish potatoes	Shangi	82	96	49	43	54	69
Rice	Basmati	148	144	152	151	148	174
	Biriani	144	145	131	129	139	178
	Pakistan			120	120	120	150
	Pishori grade 1	173	171	166	166	170	197
	Sindano	151	144	132	130	141	172
Wheat	Wheat	62	62	56	56	59	80

Source: Daily Market Survey for the month of May 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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