

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

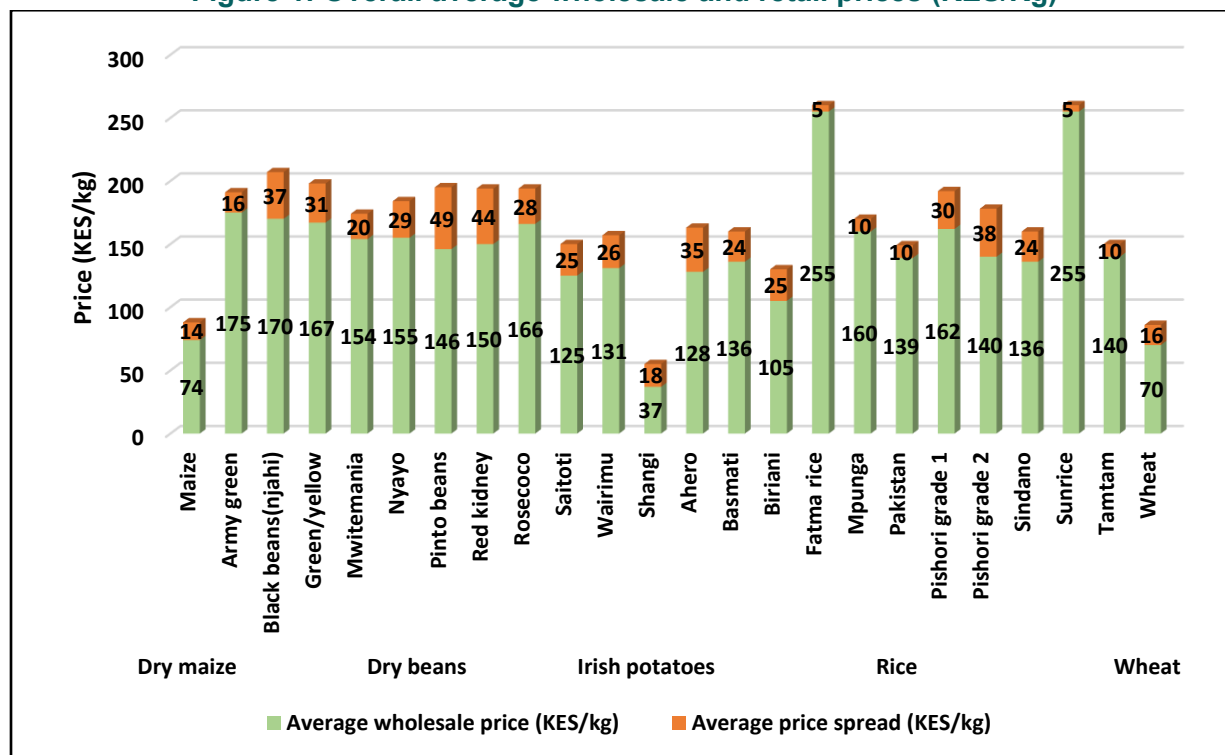
- ▶ The observed disparities in wholesale and retail pricing margins can be attributed to several factors, including high fuel prices, the depreciation of the Kenyan Shilling (KES), transportation costs, and high local demand.
- ▶ Low retail prices of Irish potatoes in Eldoret, Kisumu, Mombasa, Nakuru and Nyeri regions is greatly attributable to the influx of the commodity due to seasonality.
- ▶ Steady or declining wholesale and retail prices in most of the regions is due to the supply of food products in the regions and in the nearby Counties.

Overall Wholesale and Retail Prices for July

Figure 1 displays the typical wholesale and retail prices for maize, beans, potatoes, rice, and wheat in significant Kenyan markets in July 2023. Most commodities recorded a price margin of between 17% and 22%, these included most dry beans [Army green (22%), Black beans (19%), Mwitmania (19%), Red Kidney (17%), Rosecoco (20%), Saitoti (20%), and Wairimu (19%)] and some rice varieties [Basmati (18%), Pishori (19%), and Sindano (18%)]. Some commodities showed lower price margins of between 2% and 15% including dry maize (9%), green yellow beans (13%) and most rice varieties [Fatma rice (2%), Mpunga (6%), Pakistan (7%), Sunrice (2%), and Tamtam (7%).

Several commodities saw slightly higher price margins of between 23% and 29%, including dry wheat (23%), pinto beans (29%), Ahero rice (27%), Biriani rice (24%), and Pishori grade 2 rice (27%). Nyayo beans and Shangi Irish potatoes both had pricing margins that were noticeably higher, at 34% and 49%, respectively. Several variables, including high fuel prices, the devaluation of the Kenyan Shilling (KES), transportation expenses, and high local demand, can be blamed for the observed differences in wholesale and retail pricing margins. According to Citizen Digital's July 2023 report, transportation expenses, input costs, and weather conditions affected both retail and wholesale pricing, with transportation costs having the biggest influence because of the loss of fuel subsidies.

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



Source: Daily Market Survey for the month of July 2023

Wholesale and Retail Commodity Prices

Different dry bean kinds were found in different places, and Njahi (black beans), green/yellow, Nyayo, Rosecoco, and Wairimu beans were all prevalent in the chosen regions. Except for Kisumu, all regions had a high prevalence of Mwitemania beans, but Saitoti beans were exclusively widespread in the Mombasa region (Table 1). The region with the most bean kinds was Eldoret, followed by Nakuru, Mombasa, and Nyeri. Due to the non-production character of the Kisumu and Nairobi areas, there were few bean types reported there. As anticipated, retail prices for all bean kinds were higher than wholesale prices. Compared to the national wholesale average prices, Eldoret and Nairobi regions recorded higher wholesale prices for most beans varieties while Kisumu showed higher retail prices for most beans' varieties. Wairimu beans showed higher wholesale prices in most regions. Nakuru and Nyeri recorded lower wholesale varieties for all beans varieties. This is attributable to availability and surplus of beans in these regions. Seasonality, market dynamics including supply and demand, and bean variety all contribute to the observed price variance.

Compared to the national average wholesale and retail prices of 74KES/kg and 88KES/kg, dry maize had higher wholesale prices in Mombasa and Nairobi of 75KES/kg and 78KES/kg, respectively, and exorbitantly higher retail prices in Kisumu (100KES/kg). Mombasa is a representative market for urban customers, whereas Kisumu is a sizable market situated in a deficit area with marginal agricultural productivity. Eldoret Kisumu, Nakuru and Nyeri saw lower wholesale prices due to a combination of cross-border imports. High wholesale and retail pricing are a result of factors including high transportation costs, the use of middlemen, and market dynamics such as high demand along with limited supply.

Irish potatoes recorded higher prices in Nairobi (78KES/kg) compared to the national average wholesale price of 37KES/kg. Similarly, Kisumu, Mombasa, Nairobi and Nakuru showed highly significant retail prices compared to the national average price of 55KES/kg. Increased prices in the populous cities can be attributed to high demand, high transportation cost, and availability of middlemen. Low retail prices in Eldoret, Kisumu, Mombasa, Nakuru and Nyeri regions is greatly attributable to the influx of the commodity due to seasonality. The supply of Irish potatoes is high as there has been a steady increase in the produce from the farm since June, with such an oversupply, the consumers are spoilt for choice, and traders sometimes selling the 2kg tin for as low as KES 80 to avoid dead stock since potatoes

can be highly perishable (Kenya News Agency, August 2023).

Pishori rice was common to all regions, Ahero and Pakistan rice were common to Kisumu whereas Fatma, Sunrice, Tamtam and Mpunga rice were common to Mombasa. Basmati rice (nonaromatic rice) was common to all regions except for Kisumu and Mombasa. All regions excluding Nakuru recorded higher wholesale prices for Pishori grade 1 rice varieties. Climate change and production costs are to blame for the high cost of rice. This is brought on by insufficient rainfall and expensive fertilizers and agrochemicals.

Dry wheat recorded high wholesale prices in Eldoret (77KES/kg), Kisumu (90KES/kg), and Nyeri (77KES/kg) regions compared to the national average wholesale price of 70KES/kg. Similarly, the same regions including Nairobi which had higher retail price of 90KES/kg showed significantly high retail prices of 100KES/kg, 99KES/kg, and 96KES/kg respectively compared to the national average retail price of 86KES/kg. Market dynamics when demand exceeds supply are mostly to blame for high wheat prices in populous and non-producing areas. Wheat production in Kenya is negatively affected by seed recycling and occasional outbreaks of rust disease (USDA Rural Development, 2023).

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

Product	Variety	Average wholesale price (KES/kg)						Average retail price (KES/kg)		
		Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa
Dry beans	Army green	173		180		172	172	200		185
	Black beans(njahi)	206	143	160	172	172	165	235	227	170
	Green/yellow	173	175	165	175	161	154	200	248	170
	Mwitmania	190		140	161	143	131	202		150
	Nyayo	194	152	165	163	145	90	201	222	170
	Pinto beans	168	166				97	190	230	
	Red kidney	200	148			102		210	227	
	Rosecoco	171	160	170	172	159	156	200	226	180
	Saitoti			125						150
	Wairimu	148	149	135	137	112	103	150	210	140
Dry maize	Maize	74	66	75	78	74	76	90	100	75
Irish potatoes	Shangi	20	33	33	78	29	27	23	60	58
Rice	Ahero		128						163	
	Basmati	108			142	151	142	130		
	Biriani		108	100		108			148	110
	Fatma rice			255						260
	Mpunga			160						170
	Pakistan		139						149	
	Pishori grade 1	175		175	189	136	163	200		180
	Pishori grade 2	128	153					150	207	
	Sindano	134		145	103	146	142	160		150
	Sunrice			255						260
	Tamtam			140						150
Wheat	Wheat	77	90	60	70	64	77	100	99	75

Source: Daily Market Survey for the month of July 2023

Wholesale and Retail Price Trends by Region

Between week one and weeks two through four, different regions saw weekly price changes. Commodities displayed stable and declining wholesale and retail prices in Eldoret. Prices for most dry beans, dry maize, Shangi, and Irish potatoes decreased at both the wholesale and retail levels. On the other hand, all rice types, dry wheat, and several dry bean kinds (Army green, Black beans, Green yellow, Red kidney, and Rosecoco) showed constant wholesale and retail pricing. Due to the seasonal supply of food in the region and its bordering regions, prices are either steady or decreasing.

When prices in Kisumu were compared from week 1 to week 4, most items showed declining wholesale and retail prices, with a few showing steady or rising prices. Except for Rosecoco and Black beans, most dry beans saw a decline in wholesale price. Wholesale prices for dry maize, Shangi Irish potatoes, and Pishori grade 2 rice all decreased by 2%, 9%, and 1%, respectively. Ahero rice and Pakistan rice were among the commodities whose wholesale prices rose (by 0.38 and 1.03%, respectively). The supply of food products in the area and in the nearby Counties accounts for price stability and decreases.

Except for Shangi Irish potatoes, all commodities in the Mombasa region had constant wholesale and retail pricing. Irish potatoes showed increases in wholesale and retail prices of 6% and 8%, respectively, from week 1 prices to week 4 prices. Although Irish potatoes are in season and have had the highest price drops in most regions, prices in Mombasa may have climbed due to high demand and high transportation costs because of rising fuel prices. Mombasa is seen as a populated, non-producing city, which accounts for its high pricing. Transport expenses saw the largest rise in July because of an increase in diesel and petrol prices. This is in response to the Energy and Petroleum Regulatory Authority's (EPRA's) adjustment of fuel pump prices following the contentious Finance Act 2023's controversial Value Added Tax (VAT) hike on fuel items from 8% to 16% (The Kenyan Wall Street August 2023).

Most food commodities in the Nairobi area had declining wholesale costs, whereas most products experienced constant retail pricing. Prices for a few commodities rose in both wholesale and retail. Some dry beans (Black beans, green yellow and Nyayo), dry maize, Sindano rice, and dry wheat had price decreases of between 0.3% and 9% at wholesale levels. Wairimu beans, Basmati rice, and Pishori grade 1 rice all had price increases of between 0.4% and 1.92% whereas Rosecoco beans and Shangi Irish potatoes maintained constant pricing. Because Nairobi is a non-producing city with a large population and a strong demand for food, food costs might vary depending on the source,

FOCUS ON RICE ACROSS SELECTED REGIONS

Rice is currently the third important staple crop after maize and wheat in Kenya. It can be considered as an alternative cereal to supplement maize as it is preferred by households in ASAL (Arid and Semi-Arid Lands) regions. About 80% of rice grown in Kenya is from irrigated ecologies established by the Government and communities, while the rest is produced under rain-fed conditions. Rice is primarily grown in the Mwea Irrigation Scheme, which is located in Kirinyaga County, but it is also cultivated in other parts of the country, including Ahero in Kisumu County and Bunyala in Busia County. Due to its adaptability to all production ecologies, rice is grown in several counties including: 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 main producing area of Mwea, the main harvest month is November, whereas ratoon harvest month is August. Over 100 percent of Kenya's rice is produced via irrigation systems. It takes three to four months for the commodity to be fully ready for harvest. Kenyan rice is classified into three types: long-grain Sindano rice, medium-grain rice, and aromatic basmati rice (Pishori is the most expensive brand of rice sold in Kenya commonly grown in the Mwea irrigation scheme and its extension areas). Rice farming in Kenya is an important sector that contributes significantly to the country's food security and provides a source of income for many smallholder farmers.

Several types of rice are traded across regions; the most popular types are Pishori, Basmati, and Sindano. Most of the rice traded in different regions came from the Mwea irrigation scheme (Pishori grade 2, and Basmati), Tanzania (Pishori grade 1, Mpunga, and Sindano), Pakistan (Basmati, Biriani, Sindano, and TamTam), and Ahero irrigation system (Ahero).

In most areas in July, the average retail and wholesale price of Pishori grade 1, Basmati, and Sindano rice was higher. The dependence of Nairobi, Mombasa, and Kisumu 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. However, there are some significant steps toward improving rice seed operations in the nation; for instance, the largest farmers' cooperative in East and Southern Africa (ESA), the Mwea Rice Growers Multipurpose Cooperative Society (MRGM), in Kenya, recently received a cutting-edge seed dressing machine from the International Rice Research Institute (IRRI) (CGIAR News, June 2023). Additionally, Kenya has signed an MoU with South Korea to boost rice farming technology (The star News, July 2023).

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

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		
Basmati		128						163					128	163
Basmati 1	308			142	351	142	130			180	180	171	136	180
Basmati 2		108	100		108			148	110			138	105	130
Basmati 3			255						260				255	260
Basmati 4			160						170				160	170
Basmati 5		139						140					139	140
Basmati 6	175		175	189	136	163	200		180	218	179	194	162	192
Basmati 7	328	353					207						340	378
Basmati 8	134		145	103	146	142	160		150	120	180	170	136	160
Basmati 9			255						260				255	260
Basmati 10			140						150				140	150

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

market factors, transport cost, and the presence of intermediaries. According to the Kenya Wall Street

Newsletter, August 2023, a drop in food prices was a key factor in the cost of living in July's somewhat lower 7.3% increase over June's. During that time, most food product prices decreased.

Between week four and week one, Nakuru's wholesale and retail prices showed a mix of steady, declining, and rising food commodity prices. Dry beans (Green Yellow, Mwitemania, Red Kidney, Rosecoco, and Wairimu), Irish potatoes, and Sindano rice all saw a decline in wholesale pricing. Nyayo beans, Red Kidney, Basmati, and Sindano rice all have stable retail pricing. Black beans (3.27%), Nyayo (1.09%), and dried maize (1.94%) were among the commodities with rising wholesale prices. Notable was the large increase in wholesale pricing for various food items, including dry wheat (34.25%), Pishori grade 1 rice (27.59%), and Biriani rice (48.83%). Due to low productivity and dependency on imports, increased prices could be attributable to low supplies attributable to currency weakness.

When wholesale and retail prices in the Nyeri region were compared between weeks four and one, it was found that most items had decreased prices, while a few had increased prices. The wholesale and retail prices of all types of dry beans, dry maize, and wheat were declining. Shangi Irish potatoes and a few kinds of rice saw a spike in wholesale and retail costs, which may be related to rising fuel prices that result in expensive transportation.

Comparison of National Average Prices between June and July

A comparison of overall prices (national averages for all commodities) for June and July 2023 (Table 2) shows stable wholesale and retail prices for most commodities, slight decrease and increase for a few commodities and significant decrease for Shangi Irish potatoes. Most commodities saw stable retail and wholesale prices (between 3% and -4%) and a slight decrease of between 4% and 9%. Food commodities that saw slight increase of greater than 2% but less than 10% wholesale and retail prices included Rosecoco beans, and some rice varieties (Basmati rice, Biriani rice, Pakistan rice and Pishori grade 1 rice). Stable and decline in wholesale and retail prices for most commodities between June and July 2023 is attributable to surplus of commodities from various producing regions, and imports from the neighboring East African countries of Uganda and Tanzania and Pakistan.

Table 2: Comparison of June and July prices

Product	Variety	Average Wholesale Price (Kes/Kg)			Average Retail Price (Kes/ Kg)		
		June	July	Percentage change	June	July	Percentage change
Dry maize	Maize	75	74	-1%	91	88	-3%
Dry beans	Army green	177	175	-1%	201	191	-5%
	Black beans(Njahi)	170	170	0%	209	207	-1%
	Green/yellow	174	167	-4%	207	198	-4%
	Mwitemania	168	154	-8%	198	174	-12%
	Nyayo	163	155	-5%	189	184	-3%
	Pinto beans	160	146	-9%	207	195	-6%
	Red kidney	152	150	-1%	199	194	-3%
	Rosecoco	162	166	2%	200	194	-3%
	Saitoti	125	125	0%	150	150	0%
	Wairimu	137	131	-4%	166	157	-5%
Irish potatoes	Shangi	49	37	-24%	66	55	-17%
Rice	Ahero	127	128	1%	163	163	0%
	Basmati	134	136	1%	156	160	3%
	Biriani	99	105	6%	118	130	10%
	Fatma rice	255	255	0%	260	260	0%
	Mpunga	160	160	0%	170	170	0%
	Pakistan	140	139	-1%	143	149	4%
	Pishori grade 1	154	162	5%	185	192	4%
	Pishori grade 2	141	140	-1%	189	178	-6%
	Sindano	136	136	0%	161	160	-1%
	Sunrice	255	255	0%	260	260	0%
	Tamtam	140	140	0%	150	150	0%
Wheat	Wheat	73	70	-4%	92	86	-7%

Key	
<3 but >-4	Stable
>-4 but <-9	Slight Decrease
>-9 but <-25	Decrease
>2 but <10	Slight Increase

Outlook for the Month of August

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

- Price of Irish potatoes is expected to continue being low; the supply is high as there has been a steady increase in the produce from the farms. However, because of rising fuel costs and thus high transportation costs, some Regions may suffer higher pricing;
- Most Counties reported harvesting beans in July; as a result, August is anticipated to experience higher supply and reduced bean prices;
- Due to the availability of imports and the fact that certain regions have begun harvesting the crop, the price of maize is anticipated to decline;
- Prices of rice and wheat are expected to increase or stabilize due to increased import cost, depreciation of Kenyan shilling, and high inflation rates;

FOCUS ON MOMBASA REGION

Mombasa County, which has an area of 229.7 km² along the Kenyan coast, is one of the five counties that border the Indian Ocean and has 665 KM² of water. After the capital Nairobi, it is the second-largest city in the nation and has the second-largest metropolitan area. Mombasa is a significant commercial hub and a popular tourist destination in Kenya. The city is home to Kilindini Harbor, the most significant seaport in East Africa, which is also utilized by Tanzania and Uganda, two nearby nations, for imports and exports. (<https://en.wikipedia.org/wiki/Mombasa>).

Commodity prices are collected from Kongowea market, the largest wholesale market in East and Central Africa. Most of the Coast region's adjacent sub-counties and counties depend on Kongowea for their fresh vegetables and other agricultural goods. Both the retail area and the wholesale market carry a variety of agricultural goods. Despite being a wholesale market, Kongowea has an area for selling agricultural goods in retail. The primary produce supplier for Mombasa County's retail markets is Kongowea. The county government of Mombasa manages Kongowea, which is accessible to the public for commerce for a charge. The market is open every day of the week, starting at 4:00 am on a normal day. Traders within the Kongowea wholesale market are mainly Kenyans, some of whom have linkages with traders from Tanzania and Uganda. Traders' source beans from Uganda, and Loitokitok, while rice is sourced from Mwea, Tanzania, and Pakistan. Irish potatoes are sourced from Nakuru (Molo and Mau Narok) and Nyandarua (Kinare, and Ol-Kalau), and wheat is sourced from the Rift Valley (Narok, Uasin-Gishu, and Nakuru Counties).

Except for Shangi Irish potatoes, In Mombasa region, all commodities in July 2023 saw steady retail and wholesale prices from week 1 to week 4. A comparison between week 1 and week 4's pricing for Irish potatoes showed a 6% and 9% increase in wholesale and retail prices respectively this could be due to the commodity's strong demand and rising fuel prices, which also raise the cost of transportation.

Table 3: Average Retail and Wholesale Prices, Mombasa Region

Product	Variety	Average wholesale price (KES/kg)				Average retail price (KES/kg)				Total average wholesale price (KES/kg)
		Week 1	Week 2	Week 3	Week 4	Week 1	Week 2	Week 3	Week 4	
Dry beans	Army green	180	180	180	180	185	185	185	185	180
	Black beans (Njahi)	160	160	160	160	170	170	170	170	160
	Green/yellow	165	165	165	165	170	170	170	170	165
	Kiwitemania			140	140			150	150	140
	Nyayo	165	165	165	165	170	170	170	170	165
	Rosecoco			170	170			180	180	170
	Saitoti	125	125	125	125	150	150	150	150	125
Dry maize	Wairimu	135	135	135	135	140	140	140	140	135
	Maize	75	75	75	75	75	75	75	75	75
Irish potatoes	Shangi	32	33	33	34	54	60	60	59	33
	Biriani	100	100	100	100	110	110	110	110	100
Rice	Fatma rice	255	255	255	255	260	260	260	260	255
	Mpunga	160	160	160	160	170	170	170	170	160
	Prishori grade 1	175	175	175	175	180	180	180	180	175
	Sindano	145	145	145	145	150	150	150	150	145
	Sunrice	255	255	255	255	260	260	260	260	255
	Tamtam	140	140	140	140	150	150	150	150	140
Wheat	Wheat	60	60	60	60	75	75	75	75	60

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

ABOUT THIS SERIES

The Food Security Portal (FSP), facilitated by the International Food Policy Research Institute (IFPRI), aims to improve food security for the world's poor and increase the resilience of global food systems against food and financial crisis. The project brings together international, regional, and country-level data, news, and research aimed at meeting countries' immediate food security needs and building long-term global food security. The FSP is designed to pool information in structured ways to ensure high-quality, timely, and relevant data and to provide the opportunity for collaboration among policymakers, development professionals, and researchers.

This report is part of the FSP's efforts to monitor country-level food prices in order to improve the governments' ability to respond to and prevent food crises. It presents monthly price trends and movements for key food commodities, including dry beans, dry maize, rice, wheat, and Irish potatoes, in selected major regions and markets in Kenya.

DATA COLLECTION AND METHODOLOGY

The study was conducted in the Mombasa, Nairobi, Nakuru, Eldoret, Kisumu, and Nyeri regions of Kenya. These regions comprise the key markets in major urban centers. The five selected commodities comprise the major staple foods in Kenya¹.

Data assistants, some of whom were traders, collected average daily wholesale and retail prices from the main markets of the selected regions. Data was collected daily for six days (Mondays to Saturdays) from stockists/wholesalers and traders in the morning hours.

During the last week of the month, the following qualitative data were captured:

- General observations on food prices during the month, including price variations and the lowest, highest, and prevailing wholesale and retail prices
- The source of food commodities and their availability throughout the month
- The effects of the COVID-19 pandemic, as well as government restrictions including curfews and cessation of movement, on food prices and availability (both supply and demand)
- Traders' adaptation strategies to the COVID-19 pandemic, including sourcing and selling

Additional secondary data was obtained from the Ministry of Agriculture, Kenya Government Food Security War Room (FSWR), Ministry of Agriculture Livestock and Fisheries (MoALF), and Regional Agriculture Trade Intelligence Network (RATIN).

¹ NB: While the report covers wheat, consumption of that commodity in Kenya is comprised mainly of wheat products (flours, pastries, and highly processed foods) rather than raw wheat itself.

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