FOOD PRICE MONITOR: MAIZE AND RICE IN EAST AFRICA

MAY 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

- Kenya exhibited the highest wholesale price increase of approximately 19.2% Month-on-Month, driven by low domestic stocks and delayed imports. While Tanzania recorded the most stable wholesale prices, they remained nearly flat (−0.3%) in May 2025, signalling an adequate local supply.

- In addition, compared to May 2024, maize prices declined across the region, with the highest decline in Tanzania.

- Rice from Tanzania showed strong price stability, with wholesale and retail prices decreasing slightly. The price of Pakistani rice varied across the region; some markets saw increases, and in others, there was a decline partly due to variation in exchange rates.

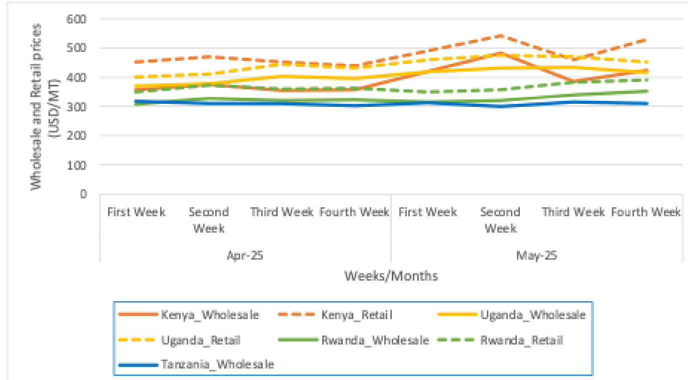
- There are opportunities for cross border trade following price differences between the countries in the region. Prices are also likely to decline in the subsequent months following harvest and Tanzania will remain a regional buffer supply of maize and rice in the lean seasons.

- Finally, while maize prices rose month-on-month, rice prices were mostly flat or slightly down reflecting differences in the market drivers. Although both crops are a staple in the region, maize is highly consumed in the region while the demand for rice is higher in more urban towns.

Changing Maize Prices in East Africa

In Chart 1, Kenya experienced a significant surge in maize prices between April and mid-May 2025. Wholesale prices increased from USD 358/MT in early April to a peak of USD 483/MT by mid-May, followed by a slight decline to USD 426/MT by month-end. This volatility mirrors national reports indicating a 45% increase in maize prices since January due to supply shortfalls, import delays, and speculative hoarding (MillingMEA, 2025; Tridge, 2025). While the United States Department of Agriculture (USDA) projected a 15.8% increase in Kenya's 2025/26 maize harvest due to expanded cultivation and stable seed prices, these benefits had not yet reached the market in April–May (USDA, 2025). Uganda saw a steady upward trend, with wholesale prices rising from USD 371/MT in early April to USD 434/MT in mid-May, reflecting typical seasonal scarcity. According to Farmgain Africa, prices in Kampala surged from UGX. 1,380/kg (USD 0.397/Kg) to UGX. 1,550/(USD 0.446/Kg) during this period, equivalent to USD 492–552/MT (Farmgain Africa, 2025). The country's position as both a consumer and regional supplier makes it sensitive to Tanzanian supply flows. Rwanda's maize prices followed a moderate upward trajectory. Wholesale prices increased from USD 308/MT in early April to USD 352/MT in late May. This relatively stable progression reflects a well-supplied market with limited volatility, suggesting effective trade access and manageable demand pressures. Tanzania exhibited downward or stable trends during the review period. Wholesale prices fell from USD 318/MT to USD 300/MT in mid-May before slightly rebounding. As a post-harvest surplus zone, Tanzania served as a buffer for Uganda and even Kenya during periods of shortage. Its ability to maintain lower and steadier prices underscores its role as a regional stabilizer (Farmgain Africa, 2025).

Figure 1: Average wholesale and retail price of maize in East Africa (April 2025 - May 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

Further, Table 1, analyses the monthly average maize prices across key East African markets—Kenya, Uganda, Rwanda, and Tanzania—for April and May 2025, compared against May 2024 prices. Price changes are expressed as both month-on-month (%) and year-on-year (%) shifts. In Kenya, retail prices rose by 12.5%, from USD 454/MT in April to USD 511/MT in May. The wholesale prices jumped by a steeper 19.2%, reflecting acute supply pressures and speculative activity in upstream markets. This aligns with national reports of delayed imports and tightening domestic stocks (MillingMEA, 2025). In Uganda, retail prices increased by 9.9%, from USD 423/MT to USD 465/MT. The wholesale prices grew similarly at 9.7%, suggesting a consistent upward trend across market levels. This is attributed to off-season supply tightness, with some buffer from Tanzanian imports (Farmgain Africa, 2025). In Rwanda, retail prices rose moderately by 2.1%, indicating relatively stable market conditions. The wholesale prices increased by 4.1%, signaling slight upstream pressure, possibly from neighbouring country dynamics. In Tanzania, prices declined slightly at the wholesale level (−0.3%), from USD 310/MT to USD 309/MT, confirming Tanzania's post-harvest stability and surplus condition.

However, from a year-on-year basis, prices dipped across all countries and market levels, despite recent monthly increases. Rwanda and Tanzania saw the sharpest declines in wholesale prices (−30.0% and −30.3%, respectively), likely due to improved harvests or greater imports. Kenya's and Uganda's prices remain below 2024 levels, but current month-on-month trends suggest upward pressure may persist in 2025 if supply issues are not resolved.

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

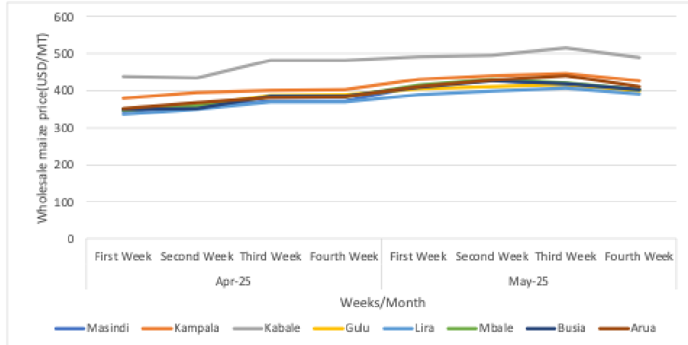
Country	Market Levels	Monthly Average Prices April 2025 (USD/MT)	Monthly Average Prices May 2025 (USD/MT)	% Change April 2025 & May 2025	Monthly Average Prices May 2024 (USD/MT)	% Change May 2024 May 2025
Kenya	Retail	454	511	12.5	604	-15.5
Uganda	Retail	423	465	9.9	509	-8.7
Rwanda	Retail	363	371	2.1	474	-21.9
Kenya	Wholesale	362	432	19.2	511	-15.5
Uganda	Wholesale	388	426	9.7	458	-7.1
Tanzania	Wholesale	310	309	-0.3	443	-30.3
Rwanda	Wholesale	319	332	4.1	474	-30.0

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

In Chart 2, all markets show a rising trend in wholesale prices between early April and mid-May. Kabale recorded the highest prices and steepest increase, peaking at USD 514/MT in Week 3 of May—a 17.4% increase from early April. Kampala, the capital, rose from USD 379/MT to a peak of USD 445/MT (+17.4%), likely reflecting central demand aggregation. Masindi and Gulu also saw significant increases (20% in some weeks), suggesting wide-ranging upward pressure. In the fourth week of May, prices slightly declined or plateaued in most markets (e.g., Kabale: USD 514/MT to USD 489/MT; Kampala: USD 445/MT to USD 426/M), potentially signalling short-term stabilisation or early harvest inflows. Kabale continues to command a regional premium, likely due to its altitude, logistical remoteness, or smaller supply base. Masindi and Arua show high sensitivity to market shifts—possibly because of regional aggregation for export or transit to South Sudan/DRC. The sustained increase through May reflects seasonal tightening and demand from cross-border traders. The price pullback in late May may signal the onset of early harvests (from northern zones), stabilization due to imports or reduced speculative activity. The regional spread of USD 100/MT between the lowest (Lira and Masindi markets) and the highest (Kabale) in May indicates geographical supply chain inefficiencies.

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



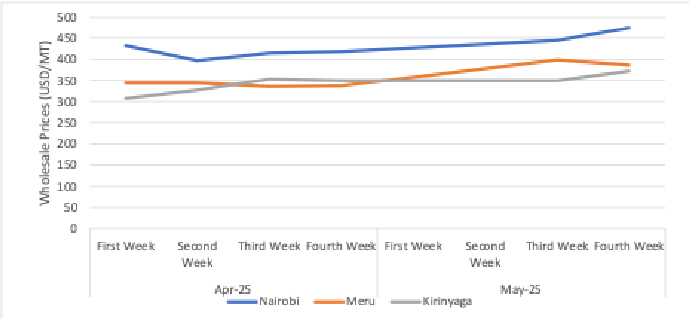
Source: Authors' construction using data from the Daily Market Traders Survey for Uganda.

Kenya

In Chart 3, the Nairobi market experienced volatile but rising wholesale prices. Prices fell in early April (USD 433/MT to USD 398/MT), then climbed steadily through May, hitting USD 474/MT in Week 4. Overall, there was 9.5% percentage increase from April average of USD 416/MT to May average of USD 457.5/ MT. This reflects Nairobi's high consumer demand and potential urban supply constraints, especially with delayed imports and national-level tightness reported during the same period (MillingMEA, 2025). In Meru market, there was a gradual buildup of prices. Prices were stable in early April (345), dropped mid-month (336), then rebounded to 400 in May Week 3. Final price in Week 4: 387 USD/MT, likely impacted by mid-season field conditions and market access to Nairobi. From April to May, the average change is from USD 340.75/MT to USD 393.5/MT (+15.5%). Kirinyaga market recorded low but rising prices. It started as the lowest priced market at USD 308/MT in early April but saw consistent growth peaking at USD 373/MT in late May. This reflects possible outflows to deficit areas, as Kirinyaga often supplies neighbouring counties. That said, all three markets experienced price increases in May, with Meru showing the steepest rise (+15.5%), indicating rising outbound flows or lower local availability. Nairobi, as a central consumption hub, remains the highest-priced market and most sensitive to supply interruptions. The spread between Nairobi and Kirinyaga widened from 125 USD/MT in Week

1 April to 101 USD/MT in Week 4 May, narrowing slightly — possibly due to redistributive flows from rural to urban.

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

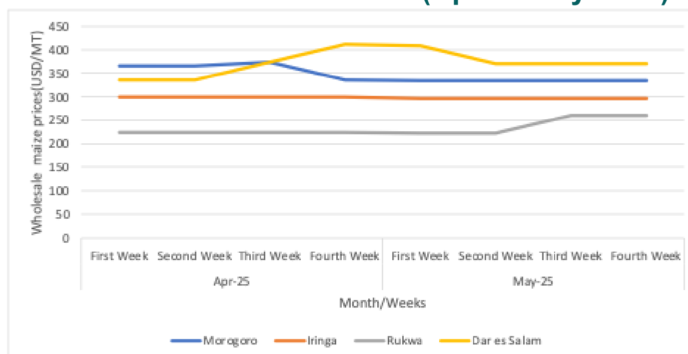


Source: Authors' construction using data from the Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya.

Tanzania

In Figure 4, Morogoro, prices peaked at USD 374/MT in April Week 3, then dropped to a stable USD 334/MT through May. This reflects post-harvest stabilization and possibly lower inter-regional demand. In Iringa market, the prices were remarkably stable throughout: they stayed at USD 299/MT in April and marginally fell to USD 297/MT in May. This stability underscores strong local supply and minimal external demand shocks. In Rukwa market, they remained at USD 224/MT until May Week 2, then jumped to USD 259.77/MT, a 16% increase — possibly due to external demand or local drawdowns. As a key producing region, Rukwa's pricing likely reflects export-driven shifts toward Uganda and western Tanzania. Dar es Salaam market showed the most volatility, prices rose from USD 336/MT (April in the first week) to USD 411/MT (April in the fourth week) and peaked at USD 408.21/MT in May in the first week, then declined and stabilized at USD 371.10/MT through the rest of May. This suggests short-term urban supply tightness followed by restored inflows from upcountry. Therefore, Morogoro and Iringa, key internal supply zones, remained relatively stable or slightly declined, pointing to post-harvest supply abundance. Rukwa's late price increase likely reflects growing demand from Uganda, the DRC, or internal redistribution. Dar es Salaam's spike suggests urban supply challenges early in May, which stabilised thereafter — potentially due to improved freight movement or port-side imports.

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



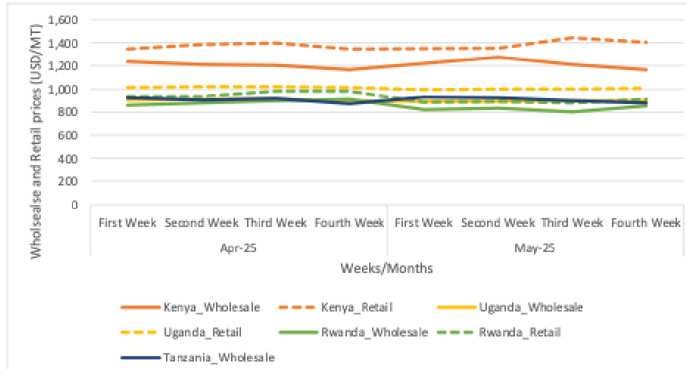
Source: Weekly Market Bulletin, Ministry of Agriculture, Tanzania

Changing Rice Prices in East Africa

Figure 5 analyses the movement of wholesale and retail rice prices across Kenya, Uganda, Rwanda, and Tanzania between April and May 2025. In Kenya, rice prices rose slightly at both wholesale and retail levels, with retail prices increasing from USD 1,368.5/MT in April to USD 1,399.0/MT in May—a 2.2% rise. The modest wholesale increase (+1.0%) suggests that urban markups and logistical inefficiencies may have driven retail inflation. Delays in imports from Pakistan and Thailand, due to freight congestion at Mombasa Port, further exacerbated tight supply in urban centers (Business Daily Africa, 2025). Uganda's rice prices remained relatively flat or declined slightly, with wholesale prices falling from USD 907.25/MT to USD 894.75/MT and retail from USD 1,015.5/MT to USD 1,001.0/MT. This 1.4% decline reflects moderate post-harvest supply and stable consumer demand. Reports also noted steady inflows from Tanzania and limited cross-border leakage to South Sudan, supporting market balance (FEWS NET, 2025). Rwanda experienced the sharpest price drops in the region. Wholesale rice prices declined by 7.0%, from USD 887.25/MT in April to USD 825.5/MT in May, while retail prices fell by 7.1%. This may reflect improved domestic harvest performance, particularly from the Eastern Province, and lessened demand due to macroeconomic pressures in the DRC, Rwanda's key informal trade partner (MINAGRI, 2025). Tanzania maintained a stable pricing environment, with wholesale prices rising marginally by 0.5%. The country benefited from a steady harvest and resilient domestic supply chains. As a net exporter, Tanzania's role in supporting regional markets remains crucial, especially in buffering Uganda and Rwanda during lean months (EAGC, 2025; Ministry of Agriculture, 2025).

The rice price dynamics in East Africa during April–May 2025 reveal heterogeneous market responses to seasonal and structural factors. Kenya's inflationary pressure contrasts with Rwanda's deflationary trend, while Uganda and Tanzania demonstrated relative price stability. Strengthening regional trade mechanisms and improving import logistics will be key to maintaining food price stability across the region.

Figure 5: Weekly average wholesale and retail prices of rice in East Africa (April – May 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.

Like the former table, Table 2 presents monthly average rice prices across retail and wholesale markets in East Africa (Kenya, Uganda, Rwanda, and Tanzania) for April 2025, May 2025, and a comparison with May 2024. It reveals both short-term (MoM) and year-on-year (YoY) changes. The short-term price movements between April and May, in Kenya, the retail prices rise from USD 1,369/MT to USD 1,399/MT, representing a 2.2% increase. Likewise, the wholesale prices range from USD 1,207/MT to USD 1,219/MT, representing a 1.0% increase. The retail prices rose faster than wholesale, indicating persistent urban demand pressure and possible supply chain inefficiencies, including delays in Asian imports and elevated domestic logistics costs (Business Daily Africa, 2025). In Uganda, the retail price dropped from USD 1,016/MT to USD 1,001/MT, a 1.5% reduction. Similarly, the wholesale fell by 1.4% from USD 907/MT to USD 895/MT. The prices declined slightly across both market levels. Stable post-harvest supplies and inflows from Tanzania contributed to easing prices. Uganda's rice market is moderately protected but sensitive to border dynamics and informal trade (FEWS NET, 2025). In Rwanda, the retail prices fell by 7.2% from USD 960/MT to USD 891/MT. Although the wholesale prices rose by 2.4% from USD 887/MT to USD 908/MT. The retail prices dropped significantly, reflecting a consumer market correction, while wholesale prices rose slightly, suggesting localized supply bottlenecks or inventory rebuilding. This dual trend highlights price transmission inefficiencies (MINAGRI, 2025). In Tanzania, the wholesale prices slightly increased by 0.4% from USD 904/MT to 908/MT. Prices remained largely stable, signalling ample domestic production and consistent market flows. Tanzania continues to anchor regional price stability, benefiting from favourable agro-climatic conditions (Ministry of Agriculture, Tanzania, 2025).

From the year-on-year price movements, we observed that Uganda and Tanzania experienced the steepest year-on-year declines, driven by improved harvests, reduced import bills, and currency stabilization. In contrast, Kenya and Rwanda maintained marginally stable year-on-year prices, indicating relative market maturity or intervention (FAO, 2025; EAGC, 2025).

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

Country	Market Levels	Monthly Average Prices April 2025 (USD/MT)	Monthly Average Prices May 2025 (USD/MT)	% Change April & May 2025	Monthly Average Prices May 2024 (USD/MT)	% Char May 20 May 2
Kenya	Retail	1369	1399	2.2	1405	-0.
Uganda	Retail	1016	1001	-1.5	1270	-21.
Rwanda	Retail	960	891	-7.2	898	-0.
Kenya	Wholesale	1207	1219	1.0	1221	-0.
Uganda	Wholesale	907	895	-1.4	1145	-21.
Tanzania	Wholesale	904	908	0.4	1285	-29.
Rwanda	Wholesale	887	908	2.4	898	1.1

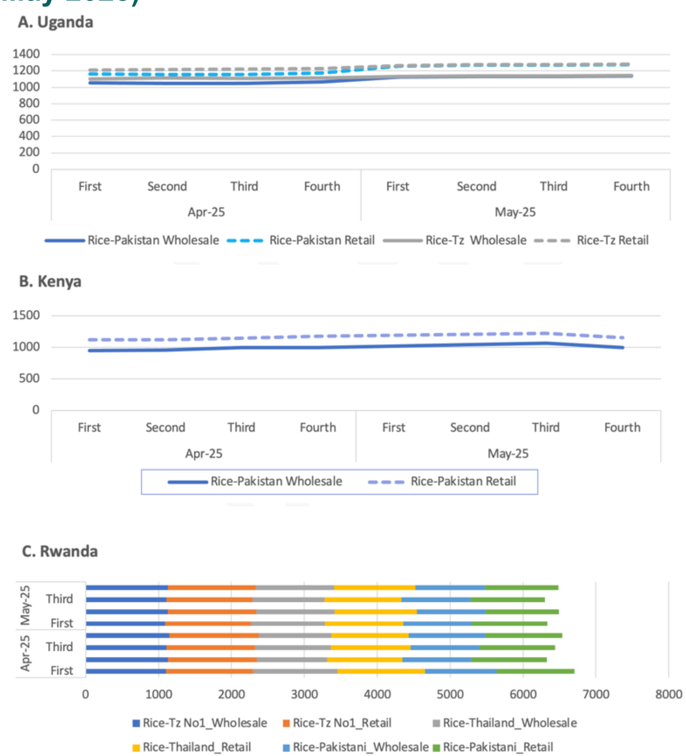
Source: Author's construction using data from the Ministry of Investment, Industry and Trade for Tanzania, eSoKo for Rwanda Ministry of Agriculture Livestock Fisheries and Cooperatives for Kenya and Daily Market Traders Survey for Uganda

In Uganda, we observed that imported rice from Pakistan recorded a notable month-on-month increase of 7.4% wholesale and 9.1% retail. Tanzanian rice prices also rose, but at a slower pace, 2.5% wholesale and 4.5% retail. The price gap between imported and local rice widened, particularly at the retail level, signalling growing cost-push inflation in imported segments. The sharp increase in Pakistani rice prices is linked to a combination of rising global demand, constrained Asian supply following export restrictions in India, and freight cost hikes (Business Daily Africa, 2025; FEWS NET, 2025). Rice from Tanzania had more price stability, owing to constant supply from the good harvests in Iringa and Rukwa regions and a steady domestic supply (Ministry of Agriculture, 2025). The relatively smaller price increase also suggests consumer substitution toward local rice due to affordability. In Kenya, Pakistani rice relatively fell owing to the bulk shipments moving through inland warehouses or older stock cycles. Conversely, ports and urban centres tend to absorb newer, costlier shipments, explaining Dataset A's higher May 2025 inflation rate. Also, parallel informal trade routes, common in regions like Busia (Kenya/Uganda border) and Western Tanzania. Traders often price commodities based on local demand elasticity, rather than uniform import costs (RATIN, 2025). In Tanzania, Tanzanian Rice (No.1 Grade) Tanzanian rice showed the most price stability overall, with only slight declines at both wholesale (−0.9%) and retail (−1.3%) levels. This suggests sustained domestic supply strength, especially from the

Iringa and Rukwa regions. Resilient local consumer demand, particularly in regional and rural markets. Minimal exposure to global price shocks due to local sourcing (Ministry of Agriculture, Tanzania, 2025). Thai rice, usually considered a premium segment, experienced modest decreases, wholesale by 0.2% and retail by 0.4%. This is likely to reflect stable global prices, slight freight rate adjustments, and reduced port congestion in Mombasa and Dar es Salaam. Thai rice remains popular in affluent urban markets (e.g., Nairobi, Kigali), where brand loyalty and perceived quality influence pricing more than origin cost alone (FAO, 2025). Pakistani rice showed the sharpest decline, particularly at the wholesale level, by 4.1% and retail level by 2.6%

This points to the likely arrival of bulk shipments, easing prior supply tightness, market correction after speculative price hikes in early April and lower cost logistics for bulk IRRI-6 grain, making it more affordable for low- and middle-income consumers (Business Daily Africa, 2025).

Figure 6: Weekly average wholesale and retail prices of imported rice varieties in Kenya (April – May 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 and rice markets across East Africa displayed moderate but uneven price movements from April to May 2025, influenced by both local harvest cycles and international trade pressures. Maize prices rose significantly in Kenya and Uganda, particularly at the wholesale level (Kenya: +19.2%, Uganda: +9.7%), reflecting tight supplies and delayed imports. Retail markets responded with smaller but still notable increases. However, when compared to May 2024, maize prices in all countries fell, signalling an overall long-term easing of inflationary pressures due to improved regional production. Tanzania continues to anchor regional price stability, exporting maize to neighbours during shortages (as seen in Uganda's April–May price rise). The low and stable prices in Iringa and Rukwa offer opportunities for regional food reserve sourcing or structured grain trading platforms

Rice prices showed mixed trends. Locally produced Tanzanian rice (No.1) remained relatively stable (−0.9% wholesale, −1.3% retail), while imported rice from Pakistan and Thailand experienced moderate volatility. Pakistani rice dropped in May 2025, suggesting easing logistical constraints and recent bulk arrivals. The rice price dynamics of imported rice revealed heterogeneous market responses to seasonal and structural factors. Kenya's inflationary pressure contrasts with Rwanda's deflationary trend, while Uganda and Tanzania demonstrated relative price stability. Strengthening regional trade mechanisms and improving import logistics will be key to maintaining food price stability across the region. However, a key pattern observed is a narrowing price gap between imported and domestic rice in retail markets, making Tanzanian rice increasingly competitive, especially in Uganda and Rwanda.

The maize market outlook promises price stability in the region, with expected seasonal harvests in parts of Uganda and Tanzania in July to August could further stabilize or reduce wholesale prices. Kenya's reliance on imports remains a vulnerability, and future prices will be influenced by international maize supply chains and El Niño-related rainfall variability. Cross-border informal trade flows may increase as price differentials widen between surplus zones (Tanzania, Uganda) and deficit markets (Kenya, Rwanda).

On the other hand, the rice market outlook we expect Tanzanian rice to continue offering price stability, especially if dry season cropping performs well in Iringa and Morogoro. Pakistani rice prices may decline slightly further due to eased shipping congestion and the arrival of contracts signed in early Q2. Thai rice will likely maintain a premium price tier, especially in urban supermarkets and high-end outlets, supported by quality branding and packaging. Expect a gradual recovery in demand as retail prices stabilize and inflationary pressures ease.

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] 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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[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

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