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

- The price of Maize in January 2026 was lowest in Uganda, followed by Tanzania, and highest in Rwanda.
- Maze Prices in January 2025 also remained higher than the same period in the previous year in Uganda and Kenya, while wholesale prices remained broadly stable year-on-year, with no significant change in Tanzania.
- Yearly differences were largely driven by tight domestic availability, sustained export demand from regional markets in Uganda, significant increases in fuel prices, cross-border trade, and demand for consumption and animal feed in Kenya, as well as unfavorable weather conditions in Rwanda.
- Kenya had the highest retail rice prices, which declined gradually through January, while rice prices in Uganda declined gradually and stabilized. The price of Rice in Rwanda was also relatively stable, whereas in Tanzania, wholesale prices increased gradually.
- Imported rice markets varied mainly by origin. In Uganda, Rwanda, and Tanzania, Rice originating from Tanzania is sold at higher prices than Pakistan-origin Rice due to consumer preferences, sourcing costs, and regional supply dynamics.

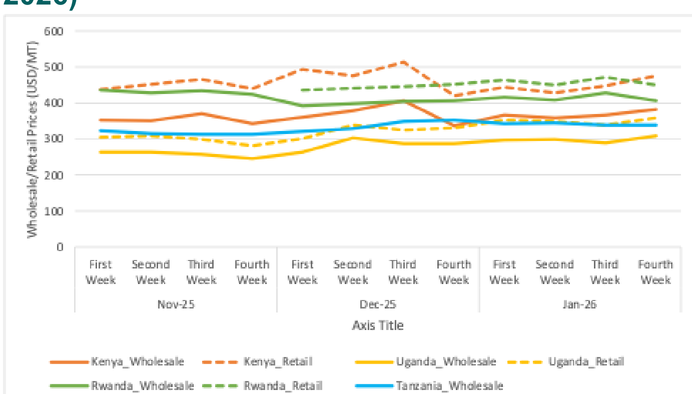
Changing Maize Prices in East Africa

Maize prices in the region increased gradually from December to January in all countries except Tanzania, which initially dropped from the last week of December to the first week of January and then remained relatively stable throughout January. Wholesale prices remained highest in Rwanda, followed by Kenya, and lowest in Uganda throughout the weeks in January 2026 (Figure 1).

On a country basis, Maize prices in Kenya increased gradually from November 2025 to December, then dropped in January and remained relatively stable. The price margins between wholesale and retail also remained relatively high in Kenya, with a significant drop from the third week in December to the fourth week in December, a slight increase in the first week in January, and then a gradual increase in the remaining weeks.

Rwanda showed relatively stable prices in the weeks of December and January, after dropping from the fourth week of November to the first week of December. In Tanzania, wholesale prices remained relatively stable throughout the weeks in January, at almost the same level as in November 2025, while in Uganda, prices remained relatively stable from the second week of December through the weeks in January 2026. Uganda also recorded the lowest prices in the region over the three months from November 2025 to January 2026, due to ample supply from the second season.

Figure 1: Average wholesale and retail price of maize in East Africa (November 2025 - January 2026)



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

Monthly average maize prices across Kenya, Uganda, Tanzania, and Rwanda between November 2025 and January 2026 show mixed price movements across countries and market levels, reflecting differences in supply conditions, domestic production cycles, and regional market integration (Table 1).

In Kenya, maize prices showed mixed but relatively stable movements between November 2025 and January 2026. Retail prices increased slightly from USD 448/MT in November to USD 449/MT in January, representing a 0.2% rise after a temporary peak of USD 476/MT in December. On a year-on-year basis, retail prices in January 2026 were 4% higher than the USD 431/MT recorded in January 2025, indicating that consumer prices remain moderately elevated despite short-term volatility. Wholesale maize prices followed a similar pattern, rising from USD 353/MT in November to USD 368/MT in January, a 4.2% increase. Compared with January 2025 levels of USD 344/MT, wholesale prices were 7% higher, suggesting continued, but moderate, upstream price pressure in Kenya's maize market. The high prices of Rice in Kenya in January 2026 compared to January 2025 are likely due to significant increases in fuel prices, cross-border trade, and increased demand for consumption and animal feed.

Uganda experienced a notable increase in maize prices across both retail and wholesale markets over the same period. Retail prices rose significantly from USD 299/MT in November 2025 to USD 350/MT in January 2026, marking a 17.1% increase. Year-on-year comparisons show an even stronger rise, with prices 28% higher than the USD 274/MT recorded in January 2025. Wholesale prices in Uganda also increased substantially, rising from USD 258/MT in November to USD 299/MT in January, representing a 15.9% increase. Compared to January 2025 levels of USD 243/MT, wholesale prices were 23% higher. Prices remained higher than the same period in the previous year, which is largely driven by tight domestic availability and sustained export demand from regional markets (Food and Agriculture Organization, 2026)

In Tanzania, wholesale maize prices continued their upward trend during the period under review. Prices increased from USD 312/MT in November 2025 to USD 343/MT in January 2026, representing a 9.9% rise. On a year-on-year basis, wholesale prices were 12% higher than the USD 306/MT recorded in January 2025. Nationally, the average grain prices increased slightly during the month, as a result of wholesale prices rising sharply as some regions made surplus production (Famine Early Warning Systems Network, FEWS NET 2026)
Rwanda recorded relatively high maize prices but with moderate fluctuations. Retail prices increased from USD 444/MT in December 2025 to USD 459/MT in January

2026, representing a 3.4% increase, and were 11% higher than the January 2025 level of USD 414/MT. Wholesale prices, however, showed slight volatility, declining from USD 431/MT in November to USD 401/MT in December before rising again to USD 415/MT in January. Despite this fluctuation, wholesale prices remained broadly stable year-on-year, with no significant change from January 2025.

Overall, maize price trends across East Africa from November 2025 to January 2026 indicate divergent market dynamics. Uganda recorded the largest significant price increases at both the retail and wholesale levels, while Kenya experienced relatively stable price movements. Tanzania continued to face steady upward pressure in wholesale markets, and Rwanda maintained comparatively high but relatively stable price levels. These patterns highlight the influence of country-specific supply conditions, seasonal production cycles, and regional trade flows in shaping maize price dynamics across the region.

Table 1: Changes in average monthly retail and wholesale price of maize in East Africa for November 2025 – January 2026

Commodity	Country	Market Levels	Monthly Average Prices November 2025	Monthly Average Prices December 2025	Monthly Average Prices January 2026	% Change November to January 2026	Monthly Average Prices January 2025	Monthly Average Price % Change between January 2025 and January 2026
Maize	Kenya	Retail	448	476	449	0.2%	431	4%
Maize	Uganda	Retail	299	324	350	17.1%	274	28%
Maize	Rwanda	Retail	443	444	459	3.4%	414	11%
Maize	Kenya	Wholesale	353	370	368	4.2%	344	7%
Maize	Uganda	Wholesale	258	285	299	15.9%	243	23%
Maize	Tanzania	Wholesale	312	338	343	9.9%	306	12%
Maize	Rwanda	Wholesale	431	401	415	3.4%	414	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

Monthly average wholesale maize prices across major Ugandan markets between November 2025 and January 2026 reveal clear geographic price differences and a gradual price strengthening toward the beginning of 2026 (Figure 2), suggesting tightening market supply conditions following the earlier seasonal easing observed in late 2025.

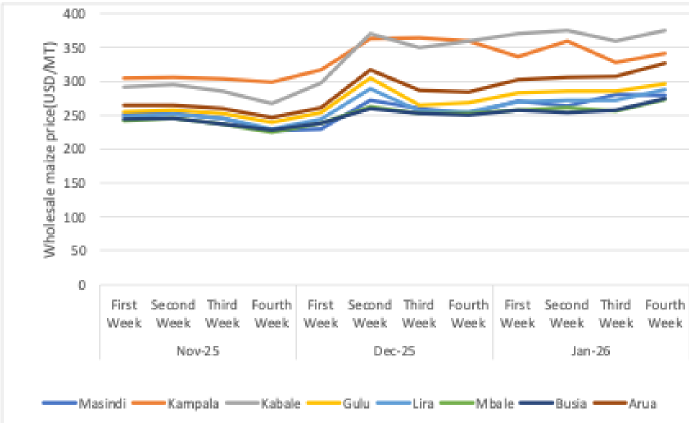
In November 2025, wholesale maize prices remained relatively moderate across most markets. Kampala recorded the highest monthly average price at USD 304/MT, reflecting its role as the country's primary consumption hub with strong demand and higher transaction costs. Kabale followed closely, averaging USD 285/MT, while Arua recorded USD 259/MT, indicating relatively stronger price levels in the southwestern and northwestern markets. Intermediate prices were observed in Gulu (USD 251/MT) and Lira (USD 244/MT). The lowest prices were recorded in Masindi (USD 244/MT), Busia (USD 239/MT), and Mbale (USD 238/MT), which were consistent with their proximity to surplus-producing areas and cross-border trade corridors where supply availability tends to moderate price levels.

In December 2025, wholesale maize prices rose noticeably across most markets, signaling tighter supply and stronger regional demand. Kampala recorded a sharp rise to a monthly average of USD 351/MT, while Kabale also saw a significant increase to USD 345/MT, remaining among the highest-priced markets. Arua averaged USD 288/MT, reflecting sustained demand in the northwestern corridor. Prices in northern markets also increased, with Gulu averaging USD 273/MT and Lira USD 261/MT. Eastern and surplus-adjacent markets recorded relatively lower prices, including Mbale (USD 252/MT) and Busia (USD 250/MT), while Masindi averaged USD 254/MT, maintaining its position among the lower-priced markets.

By January 2026, wholesale maize prices increased further across nearly all markets, reinforcing the upward trend observed in December. Kabale recorded the highest monthly average at USD 370/MT, reflecting sustained supply tightness in the southwestern region. Kampala followed with an average of USD 341/MT, maintaining relatively elevated prices due to strong urban demand. Arua recorded USD 311/MT, while northern markets such as Gulu (USD 288/MT) and Lira (USD 276/MT) also experienced continued price increases. Prices remained comparatively lower in eastern and supply-proximate markets, with Mbale averaging USD 262/MT, Busia USD 261/MT, and Masindi USD 274/MT. However, all showed noticeable increases compared to previous months.

An increase in grain prices has been reflected in tighter market supplies following the conclusion of the main harvest period. The price increase further suggests reduced market arrivals as seasonal stocks begin to decline, placing upward pressure on domestic prices (African Food Trade and Resilience Initiative, 2026).

Figure 2: Average weekly retail prices of maize in selected markets in Uganda (November 2025 – January 2026)



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

Kenya

Wholesale maize price trends across selected markets in Kenya.

Monthly average wholesale maize prices across key Kenyan markets between November 2025 and January 2026 show moderate spatial price differences, with higher volatility in December and partial stabilization in January (Figure 3).

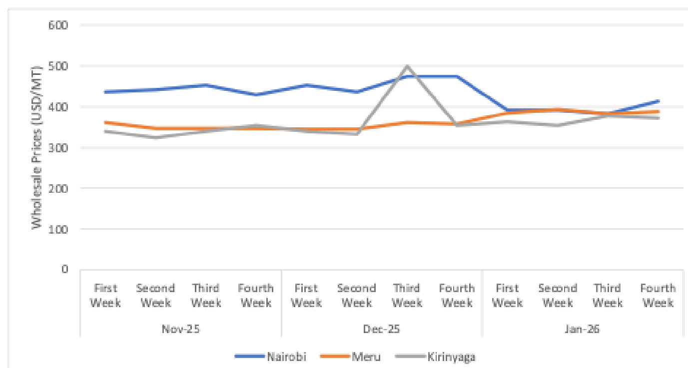
In November 2025, wholesale maize prices were highest in Nairobi, where the monthly average was USD 440/MT, reflecting its position as the country's main consumption center with strong demand and higher marketing and transport costs. Meru averaged USD 351/MT, indicating relatively moderate price levels in this production-linked market. Kirinyaga recorded the lowest monthly average at USD 339/MT, suggesting relatively favorable supply availability in central Kenya and proximity to maize-producing areas.

In December 2025, wholesale maize prices increased across most markets, particularly in Nairobi, where the monthly average rose to USD 459/MT, reflecting tightening supply conditions and strong urban demand. Meru prices remained relatively stable, averaging USD 352/MT, indicating steady supply conditions in the region. Kirinyaga, however, recorded a sharp increase to a monthly average of USD 381/MT, largely due to a significant price spike during the third week of December. This temporary surge suggests short-term market disruptions or localized supply constraints during the period.

By January 2026, wholesale maize prices showed mixed movements across the three markets. Nairobi experienced a noticeable decline, with the monthly average falling to USD 394/MT, indicating some easing in supply pressures following the December peak. In contrast, Meru recorded a substantial increase to USD 387/MT, reflecting stronger regional demand or tightening supply conditions. Kirinyaga prices declined slightly from the December spike but remained elevated, averaging USD 367/MT, suggesting that market adjustments were ongoing.

Overall, the monthly averages indicate persistent spatial price variation across Kenyan wholesale maize markets, with Nairobi consistently recording the highest prices due to strong consumption demand. At the same time, Meru and Kirinyaga reflect supply-linked market dynamics in central Kenya. The price surge in December, followed by partial easing in January, suggests short-term supply fluctuations and market adjustment, highlighting the role of seasonal supply flows and localized market conditions in shaping maize price dynamics across the country.

Figure 3: Average weekly retail prices of maize in selected markets in Kenya (November 2025 – January 2026)



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

Tanzania

Monthly average wholesale maize prices across key Tanzanian markets between November 2025 and January 2026 indicate clear spatial price variation and fluctuating price movements (Figure 4), reflecting shifting supply conditions and urban demand pressures.

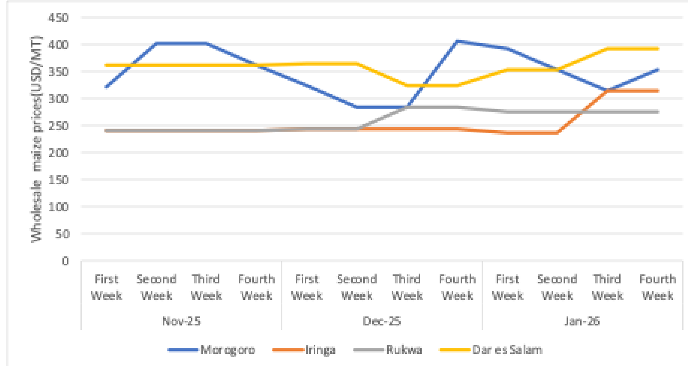
In November 2025, wholesale maize prices were highest in Dar es Salaam, where the monthly average was USD 362/MT, reflecting strong demand in the country's main consumption and trade hub, where transport and marketing costs tend to push prices higher. Morogoro followed with an average of USD 372/MT, indicating relatively strong prices in this central market, which serves as an important distribution corridor between surplus-producing areas and urban consumption centers. In contrast, significantly lower prices were observed in production-linked markets such as Iringa and Rukwa, both averaging USD 241/MT, reflecting greater local supply availability in the southern highland production zones.

In December 2025, wholesale maize prices declined in several markets, indicating improved supply availability and seasonal adjustments in the maize marketing system. Morogoro recorded a decline to a monthly average of USD 325/MT, while Dar es Salaam also eased slightly to USD 345/MT, suggesting some improvement in supply flows into the urban market. Prices in Iringa remained relatively stable at USD 243/MT, reflecting consistent supply conditions in this production region. Rukwa, however, recorded a moderate increase to USD 264/MT, indicating some supply tightening or increased demand from surrounding deficit areas.

By January 2026, wholesale maize prices increased again across several markets, suggesting renewed upward pressure in the maize value chain. Dar es Salaam recorded a rise to a monthly average of USD 364/MT, maintaining its position as one of the highest-priced markets, driven by strong urban demand. Morogoro prices also increased to USD 354/MT, reflecting its role as a key trading corridor linking surplus regions in the south to consumption centers. Production-area markets experienced more moderate increases, with Iringa and Rukwa both averaging USD 275/MT, indicating some tightening in supply conditions compared to previous months.

Overall, the monthly averages highlight persistent geographical price dispersion across Tanzanian wholesale maize markets, with Dar es Salaam and Morogoro generally recording higher prices due to demand concentration and their role in national distribution networks, while Iringa and Rukwa maintain relatively lower prices because of their proximity to major maize-producing zones. The price fluctuations observed between November 2025 and January 2026 suggest ongoing market adjustments influenced by seasonal supply flows and internal trade dynamics. Tanzania's annual inflation rate fell to 3.3% in January 2026 from 3.6% in December, mainly due to slower price increases in food items (Luisa Carvalho, 2025).

Figure 4: Average weekly retail prices of maize in selected markets in Tanzania (November 2025 – January 2026)



Source: Weekly Market Bulletin, Ministry of Agriculture, Tanzania

Changing Rice Prices in East Africa

During the November 2025 to January 2026 period, rice prices in East Africa remained relatively elevated but showed clear divergence across markets. Kenya continued to record the highest retail prices, although both wholesale and retail levels declined by January. Uganda experienced a temporary decline in December, followed by a modest recovery, while Rwanda recorded a significant structural decline in wholesale prices relative to November levels. In contrast, Tanzania exhibited steady upward pressure in wholesale markets, suggesting tightening supply conditions or stronger regional demand. Despite short-term fluctuations, retail prices in Kenya and Uganda consistently remained well above wholesale levels, reflecting persistent marketing costs and value-chain margins across the region.

Rice prices in Kenya remained elevated but gradually declined toward the start of 2026. In November, wholesale prices ranged from USD 1,196 to USD 1,232/MT, averaging USD 1,208/MT, while retail prices remained significantly higher, fluctuating between USD 1,349 and USD 1,397/MT. In December, wholesale prices softened slightly to an average of around USD 1,191/MT, while retail prices increased modestly to an average of USD 1,401/MT, indicating a widening of wholesale and retail margins during the period. By January 2026, both wholesale and retail prices declined more noticeably. Wholesale prices averaged USD 1,136/MT, while retail prices dropped to approximately USD 1,267/MT. Despite this easing, the persistent price spread between wholesale and retail levels, generally exceeding USD 120–150/MT, continues to highlight sustained consumer-level pressure in Kenya's rice market.

Uganda's rice market displayed moderate volatility with a temporary decline followed by stabilization. In November

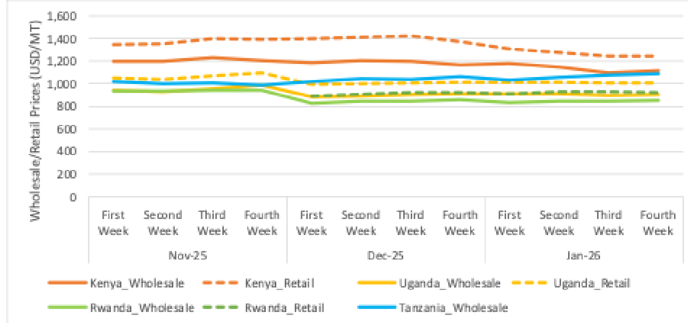
2025, wholesale prices increased steadily from USD 941/MT to USD 988/MT, while retail prices rose from USD 1,051/MT to USD 1,098/MT, averaging USD 954/MT and USD 1,064/MT, respectively. In December, prices declined significantly as wholesale levels fell to an average of USD 896/MT, while retail prices eased to approximately USD 1,003/MT, suggesting improved supply availability or reduced demand pressures during the month. By January 2026, both wholesale and retail prices stabilized, averaging USD 906/MT and USD 1,012/MT, respectively. Although prices remained below November levels, the stabilization suggests that earlier supply improvements may have moderated but not fully reversed the downward correction.

Rwanda's wholesale rice market exhibited a notable structural shift during the period. In November 2025, wholesale prices remained high and stable, fluctuating between USD 937–945/MT, with a monthly average of approximately USD 941/MT. However, in December, prices declined sharply to an average of USD 842/MT, a significant drop from November levels. This decline was due to improved import availability, policy adjustments, or stronger regional supply inflows. In January 2026, prices remained relatively stable but rose slightly to an average of USD 844/MT, suggesting the market had reached a new equilibrium following the December correction.

Tanzania recorded steady upward momentum in wholesale rice prices throughout the period. In November 2025, prices averaged approximately USD 1,004/MT, ranging from USD 989 to USD 1,019/MT. In December, wholesale prices increased further to an average of about USD 1,040/MT, indicating strengthening market conditions and potentially tighter domestic supply. By January 2026, prices continued to rise, averaging roughly USD 1,063/MT and peaking at USD 1,089/MT in the fourth week. This sustained increase suggests ongoing upward pressure on Tanzania's rice market, potentially driven by regional trade flows, domestic supply constraints, or strong consumer demand.

Generally, rice price dynamics across East Africa from November 2025 to January 2026 reveal divergent market trajectories. Kenya maintained the highest retail price levels despite a gradual easing toward January. Uganda experienced a temporary December decline followed by stabilization, while Rwanda recorded a sharp structural correction in wholesale prices before stabilizing. In contrast, Tanzania exhibited consistent upward momentum in wholesale prices, indicating strengthening supply pressures.

Figure 5: Weekly average wholesale and retail prices of Rice in East Africa (November 2025 – January 2026)



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.

Table 2 presents monthly average rice prices at the retail and wholesale levels across selected East African countries from November 2025 to January 2026, together with year-on-year comparisons with January 2026.

Monthly average rice prices across Kenya, Uganda, Tanzania, and Rwanda between November 2025 and January 2026 reveal mixed price movements across countries and market levels, reflecting differences in supply conditions, domestic demand, and regional trade dynamics. While Kenya and Uganda experienced modest declines at the retail level over the period, Tanzania recorded continued upward pressure in wholesale markets, and Rwanda displayed moderate retail increases alongside declining wholesale prices.

In Kenya, rice prices showed relatively stable dynamics with moderate fluctuations across both retail and wholesale markets. Retail prices increased from USD 1,275/MT in November 2025 to USD 1,401/MT in December, then declined to USD 1,267/MT in January 2026, representing a slight 0.6% decrease over the three-month period. Despite this short-term decline, retail prices in January 2026 were 4% higher than the USD 1,213/MT recorded in January 2025, indicating continued, though moderate inflationary pressure at the consumer level. Wholesale prices followed a slightly different trend, increasing from USD 1,112/MT in November to USD 1,191/MT in December, then easing to USD 1,136/MT in January, for a 2.2% increase over the period. On a year-on-year basis, wholesale prices were 9% higher than the USD 1,039/MT recorded in January 2025, suggesting persistent upstream cost pressures in Kenya's rice supply chain.

In Uganda, rice prices declined modestly between November 2025 and January 2026, indicating improved supply availability or easing demand pressures in the market. Retail prices decreased from USD 1,063/MT in November to USD 1,012/MT in January, representing a 4.8% decline over the period. However, retail prices remained 27% higher than the USD 794/MT recorded in January 2025, reflecting substantial year-on-year inflation in Uganda's rice market. Wholesale prices followed a similar downward trend, declining from USD 953/MT in November to USD 906/MT in January, a 4.9% decrease. Nevertheless, wholesale prices were 29% higher than the USD 703/MT recorded in January 2025, indicating that underlying supply pressures remain significantly elevated compared to the previous year.

In Tanzania, wholesale rice prices continued to rise steadily over the period, reflecting sustained upward pressure in the market. Prices increased from USD 1,007/MT in November 2025 to USD 1,063/MT in January 2026, representing a 5.6% increase. Compared with USD 788/MT recorded in January 2025, prices were 35% higher year-on-year, highlighting persistent supply constraints or strong regional demand in the Tanzanian rice market.

In Rwanda, rice prices displayed contrasting movements between retail and wholesale markets. Retail prices increased slightly from USD 914/MT in December 2025 to USD 922/MT in January 2026, representing a 0.9% increase, and stood 36% higher than the USD 678/MT recorded in January 2025. Wholesale prices, however, declined significantly from USD 941/MT in November to USD 842/MT in December, before stabilizing at USD 844/MT in January, reflecting a 10.3% decrease over the three months. Despite this short-term decline, wholesale prices remained 24% above January 2025 levels, suggesting that the overall market environment remains under elevated price pressures.

Overall, rice price trends across East Africa between November 2025 and January 2026 demonstrate diverging market dynamics across countries and market levels. Kenya recorded relatively stable prices with minor fluctuations, while Uganda experienced short-term price declines despite strong year-on-year increases. Tanzania maintained a clear upward trajectory in wholesale prices, reflecting sustained supply pressures, while Rwanda showed modest retail increases alongside declining wholesale prices. These patterns highlight the importance of country-specific supply conditions, import dynamics, and regional trade flows in shaping rice price movements across East African markets.

Table 2: Monthly retail and wholesale price changes of rice in East Africa (November 2025 – January 2026, January 2025, and January 2024)

Country	Market Levels	Monthly Average Prices November 2025	Monthly Average Prices December 2025	Monthly Average Prices January 2026	% Change November to January 2026	Monthly Average Prices January 2025	Mont Aver Price Char betw Janu 2025 Janu 2026
Kenya	Retail	1275	1401	1267	-0.6%	1213	4%
Uganda	Retail	1063	1003	1012	-4.8%	794	27%
Rwanda	Retail	-	914	922	0.9%	678	36%
Kenya	Wholesale	1112	1191	1136	2.2%	1039	9%
Uganda	Wholesale	953	896	906	-4.9%	703	29%
Tanzania	Wholesale	1007	1040	1063	5.6%	788	35%
Rwanda	Wholesale	941	842	844	-10.3%	678	24%

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

Uganda

Monthly average prices for imported Rice in Uganda between November 2025 and January 2026, disaggregated by Pakistan-origin and Tanzania-origin Rice, reveal clear price differentiation by origin and a notable increase in prices toward January 2026.

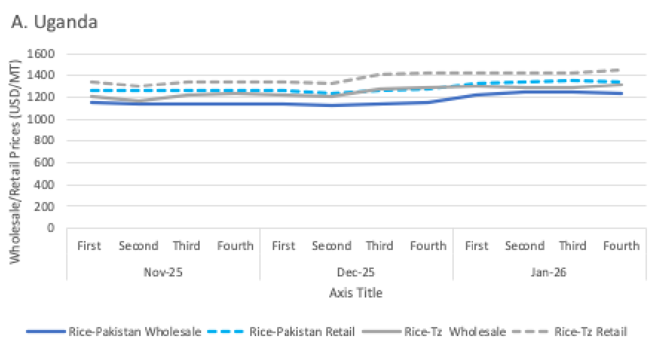
In November 2025, Pakistan-origin Rice recorded a monthly average wholesale price of approximately USD 1,143/MT, while the corresponding retail price averaged USD 1,258/MT. Tanzania-origin rice remained consistently more expensive, with a wholesale monthly average of about USD 1,206/MT and a retail average of USD 1,331/MT. The persistent price premium of Tanzania rice suggests stronger consumer preference for regional varieties, higher transportation and sourcing costs, or relatively tighter supply conditions compared with imported Rice from Pakistan.

In December 2025, prices for Pakistan-origin rice remained relatively stable. Wholesale prices averaged around USD 1,142/MT, while retail prices remained close to USD 1,257/MT, indicating minimal change from November levels. In contrast, prices for Tanzania-origin rice increased noticeably during the month. Wholesale prices rose to an average of about USD 1,250/MT, while retail prices increased to approximately USD 1,377/MT, reflecting stronger demand or tightening supply for regionally sourced Rice.

By January 2026, rice prices had increased substantially for both origins. Pakistan-origin rice wholesale prices rose sharply to a monthly average of approximately USD 1,237/MT, while retail prices increased to about USD 1,342/MT. Tanzania-origin rice maintained its price premium, with wholesale prices averaging USD 1,298/MT and retail prices reaching approximately USD 1,432/MT, the highest levels observed during the three-month period. The broad increase across both rice types suggests tightening supply conditions, rising import costs, or stronger post-holiday consumer demand in the Ugandan rice market.

Overall, the monthly averages indicate that imported rice prices in Uganda remained relatively stable in November and December, then increased significantly in January 2026. Throughout the period, Tanzania-origin rice consistently commanded a higher price than Pakistan-origin rice at both wholesale and retail levels, highlighting persistent quality differentiation, regional sourcing dynamics, and strong consumer preference for Tanzanian Rice in Ugandan markets.

Figure 6: Weekly average wholesale and retail prices of imported rice varieties in Uganda (November 2025- January 2026)



Source: Author's construction using data from the Daily Market Traders Survey for Uganda

Kenya

Monthly and weekly average prices for Pakistan-origin rice in Kenya between November 2025 and January 2026 show short-term volatility in wholesale markets, with retail prices generally remaining higher than wholesale throughout the period.

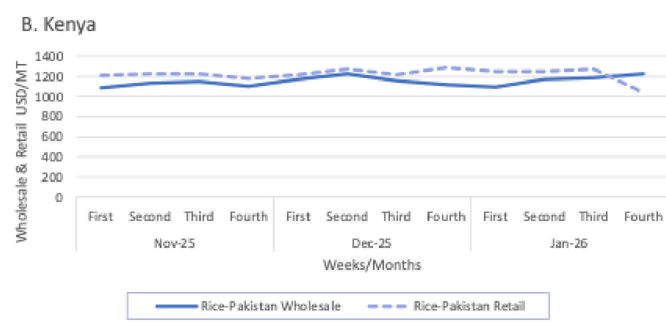
In November 2025, Pakistan rice recorded weekly wholesale prices ranging from approximately USD 1,088/MT to 1,151/MT, while retail prices averaged USD 1,182/MT to 1,228/MT. The fluctuations reflect temporary supply variations, likely driven by intermittent import arrivals or distribution adjustments. Retail prices were relatively stable, indicating consistent handling and transport costs.

In December 2025, wholesale prices rose sharply in the second week to about USD 1,227/MT, then declined to 1,116/MT by the fourth week. Retail prices, in contrast, increased steadily, peaking at USD 1,291/MT in the fourth week. The widening wholesale–retail margin suggests that retailers were either passing through earlier higher import costs or adjusting margins in response to market uncertainty.

In January 2026, wholesale prices ranged from USD 1,093/MT to USD 1,224/MT, indicating modest upward pressure. Retail prices remained elevated during the first three weeks (USD 1,250–1,271/MT). The fourth week shows a notable anomaly: reported retail prices fall below wholesale levels, suggesting a possible reporting error or unusual market intervention.

Overall, the weekly data indicate that Pakistan-origin rice prices in Kenya experienced volatility at the wholesale level. In contrast, retail prices generally trended upward, reflecting persistent cost pass-through along the value chain. Despite short-term fluctuations, the market exhibits structural retail–wholesale margins, driven by distribution, transport, and handling costs.

Figure 7: Weekly average wholesale and retail prices of imported rice varieties in Kenya (November 2025 – January 2026)



Source: Analysis using data from the Ministry of Agriculture, Livestock, Fisheries, and Cooperatives for Kenya

Rwanda

Monthly and weekly data for Pakistan, Thailand, and Tanzania-origin Rice in Rwanda show clear differences in pricing across origins, with consistent retail–wholesale spreads reflecting distribution costs and market demand.

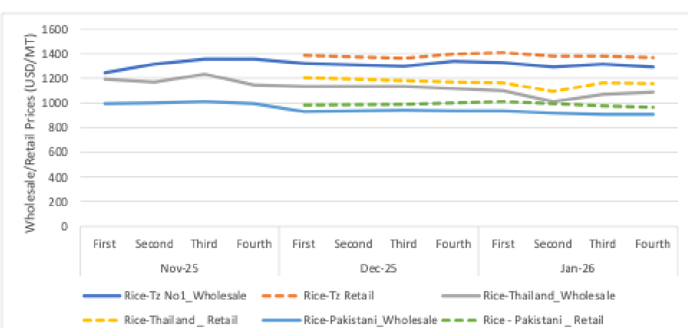
In November 2025, Tanzania No.1 rice recorded weekly wholesale prices ranging from USD 1,246/MT to 1,360/MT, with retail prices slightly higher, averaging around USD 1,191–1,237/MT. Thailand-origin Rice was traded at wholesale prices of USD 994–1,191/MT and retail prices of USD

1,145–1,237/MT, while Pakistan-origin rice was the most affordable, with wholesale prices of USD 994–1,015/MT and retail prices of USD 996–1,015/MT. November data shows short-term weekly volatility, particularly for Tanzania rice, likely due to supply constraints or strong demand. Retail prices remained broadly stable and above wholesale, indicating normal market margins.

During December 2025, Tanzania rice wholesale prices ranged from USD 1,300 to 1,343/MT, while retail prices increased steadily to USD 1,363 to 1,399/MT, reflecting firm demand and full pass-through of costs along the supply chain. Thailand-origin Rice remained relatively stable, with wholesale prices of USD 1,121–1,134/MT and retail prices of USD 1,169–1,203/MT, indicating predictable imports and consistent market margins. Pakistan-origin Rice remained the most cost-competitive option, with wholesale prices of USD 929–945/MT and retail prices of USD 981–1,000/MT, showing narrower margins for price-sensitive consumers. December trends highlight upward pressure on premium rice, stable mid-tier Rice, and continued affordability for Pakistan-origin rice.

In January 2026, Tanzania rice wholesale prices ranged from USD 1,295 to 1,327/MT, while retail prices stayed elevated at USD 1,367 to 1,412/MT, signaling ongoing strong demand. Thailand-origin Rice traded at wholesale USD 1,012–1,100/MT and retail USD 1,092–1,166/MT, with minor fluctuations. Pakistan-origin Rice remained low-cost, with wholesale prices of USD 906–936/MT and retail USD 968–1,010/MT, demonstrating stability and accessibility for cost-conscious consumers. Mid-month, wholesale prices softened slightly, but retail prices remained largely firm, particularly for premium Rice.

Figure 8: Weekly average wholesale and retail prices of imported rice varieties in Rwanda (November 2025 – January 2026)



Source: Analysis using data from eSoKo website for Rwanda

Summary and Future Outlook

Between November 2025 and January 2026, Maize and rice markets across Kenya, Uganda, Rwanda, and Tanzania showed diverging price dynamics, reflecting differences in domestic supply conditions, seasonal harvest cycles, and varying regional demand and supply. While some markets experienced short-term easing during November and December, price movements across the region generally pointed towards an increase by the beginning of January 2026.

For Maize, market changes varied considerably across countries. Uganda recorded the most pronounced upward trend, with prices recovering steadily after initial declines in November as seasonal harvest supplies diminished and export demand strengthened. Kenya exhibited significant short-term volatility, particularly during December, before prices rebounded moderately in January, suggesting fluctuating supply inflows and demand adjustments. In contrast, Rwanda maintained persistently high price levels with relatively limited volatility, reflecting structurally tight domestic supply conditions. Tanzania experienced more moderate price movements, with gradual increases followed by stabilization, indicating relatively balanced market fundamentals despite growing regional demand. Overall, maize markets across the region showed signs of tightening toward the start of 2026 as seasonal stocks declined and cross-border trade continued to influence domestic availability.

For Rice, price changes followed a different pattern, with greater divergence across national markets. Kenya continued to record the highest retail price levels in the region, although both wholesale and retail prices gradually declined towards January, suggesting easing import pressures or improved supply availability. Uganda experienced a temporary price decline in December, followed by stabilization in January, indicating short-term supply improvements that partially moderated earlier upward pressures. Rwanda's rice prices had some adjustments, with wholesale prices falling sharply before stabilizing, likely reflecting increased import availability or policy adjustments affecting supply flows. In contrast, Tanzania experienced a consistent upward trend in wholesale rice prices, suggesting tightening domestic supply conditions or strengthening regional demand.

Across the region, retail rice prices in Kenya and Uganda remained mostly higher than wholesale levels, reflecting persistent marketing, transportation, and distribution costs along the value chain. At the same time, imported rice markets showed clear differentiation by origin, particularly in Uganda and Rwanda, where regionally sourced rice varieties continued to command price premiums over other imported varieties.

Overall, the price developments between November 2025 and January 2026 highlight the continued sensitivity of staple food markets in East Africa to seasonal supply fluctuations, domestic production performance, and regional trade dynamics. While some markets experienced temporary easing during the late harvest period, the renewed upward pressure observed in several countries toward January suggests tightening supply conditions and sustained demand across the region.

In Kenya, staple food prices are expected to increase moderately in the coming months as household and market stocks gradually decline following the earlier harvests. Reduced availability is likely to increase pressure on staple prices, particularly in key consumption centers such as Nairobi and Mombasa. The anticipated price increases may also be reinforced by continued demand and distribution costs along the supply chain (FEWS NET, 2026).

Farmers in Kenya's North Rift region are reportedly withholding maize stocks in anticipation of a potential supply shortage and higher market prices once millers deplete their existing reserves. In response, the government has issued a directive giving farmers a limited period to release stored grain into the market, warning that failure to do so may prompt the authorisation of duty-free maize imports intended to stabilize maize flour prices and ease pressure on consumers (Barnabas Bii, 2026)

Tanzania's annual inflation has continued to decline, to 3.3 percent from 3.6 percent in December, suggesting some easing in overall price pressures. In major consumption centers such as Dar es Salaam and Dodoma, prices are expected to remain relatively stable, as releases from strategic grain reserves help offset the anticipated supply shortfall. While the moderation in inflation may provide some short-term relief to consumers, the increased pressure on grain prices in producing areas indicates that supply could continue to influence market conditions in the coming months (FEWS NET, 2026). Uganda's fuel price increases have also added further pressure on market prices as compared to last year. This is because fuel costs directly affect the transportation and distribution of goods, as such increases are often transmitted through the supply chain, contributing to higher market prices (Daily Monitor, 2026).

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.

[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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