FOOD PRICE MONITOR: MAIZE AND RICE IN EAST AFRICA

NOVEMBER 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

- Maize prices eased in Kenya and Uganda, reflecting seasonal improvements in supply. Rwanda and Tanzania recorded gradual price increases at the wholesale level, pointing to persistent supply tightness and uneven regional adjustment.

- Kenya experienced the highest volatility in maize prices, amidst intensified competition between public and private buyers and tightening grain supplies.

- Uganda recorded consistent declines at both wholesale and retail levels, supported by improved domestic harvests and relatively strong supply conditions.

- Rwanda's maize prices remained structurally elevated, with only modest softening toward November, reflecting sustained exposure to regional price transmission and limited domestic supply buffers.

- Tanzania's maize market remained relatively stable, with wholesale prices increasing modestly over the period due to tight stocks and strong regional demand.

- Rice prices remained elevated across the region, with Kenya maintaining the highest price levels despite easing toward November, while Uganda, Tanzania, and Rwanda experienced continued upward pressure, particularly at the wholesale level.

- Year-on-year comparisons highlight persistent inflationary pressures on staples, especially Rice, in Uganda and Tanzania, where prices remain significantly above November 2024 levels.
- Imported rice markets showed strong differentiation by origin, with Tanzania-origin rice consistently commanding a premium over Pakistan rice in Uganda and Rwanda, reflecting sourcing costs, consumer preferences, and regional supply dynamics.
- Macroeconomic and policy factors reinforced price pressures, including fuel price increases, exchange-rate movements, evolving price regulation frameworks, and strong regional procurement demand.

Changing Maize Prices in East Africa

Country-level patterns indicate high price volatility in Kenya, gradual easing in Uganda, persistently elevated prices in Rwanda, and relative stability in Tanzania. While prices generally declined from September to November in Kenya and Uganda, wholesale prices in Rwanda and Tanzania remained unchanged, pointing to uneven regional adjustment.

Between September and November 2025, maize prices in Kenya were volatile but generally trended downward. In September, wholesale prices fluctuated between USD 378 and USD 396/MT, while retail prices ranged between USD 470 and USD 489/MT. In October, wholesale prices declined sharply to a low of USD 347/MT, while retail prices fell to USD 438–449/MT. In November, wholesale prices ranged from USD 342 to 371/MT, while retail prices fluctuated between USD 438 and 466/MT, with a temporary rebound to USD 466/MT in the third week, reflecting heightened competition among major buyers, particularly between the NCPB and private millers. The price of a 90-kg bag increased from approximately USD 21.7 to USD 24.8, equivalent to about USD 34/MT (Bii, 2025).

Uganda exhibited moderate stability with a clearer downward trajectory by November. In September, wholesale prices increased from USD 264/MT to USD 292/MT, while retail prices rose from USD 313/MT to USD 337/MT. In October, wholesale prices stabilized between USD 266–281/MT, while retail prices fluctuated within USD 311–333/MT. By November, both wholesale and retail prices declined steadily, with wholesale prices falling to USD 245/MT and retail prices to USD 281/MT, down from USD 292/MT and USD 337/MT, respectively, at the end of September. This pattern reflects improved supply from new harvest inflows and easing market pressure.

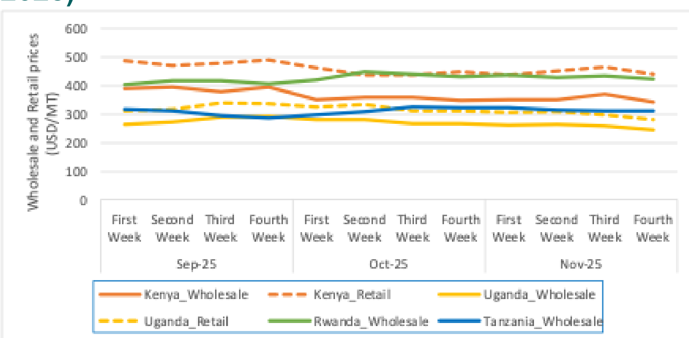
Rwanda had consistently high wholesale maize prices throughout the period, with limited week-to-week variation. In September, prices ranged from USD 405 to USD 418/MT, while in October they increased further, peaking at USD 448/MT before easing to USD 431/MT. In November, prices remained elevated, fluctuating between USD 424–437/MT and ending at USD 424/MT, making Rwanda the highest-priced market in the region. Despite minor corrections, price levels remained structurally elevated, reflecting tight supply conditions and strong regional price transmission.

Tanzania exhibited moderate, relatively stable wholesale prices over the period. In September, prices declined from USD 318/MT to USD 286/MT, while in October they increased gradually to USD 326/MT, indicating tightening supply conditions. In November, prices stabilized within a narrow range of USD 312–322/MT. Compared to Kenya and Rwanda, Tanzania's prices were lower but remained above Uganda's November levels, reinforcing its intermediate position within the regional maize market.

Overall, maize prices declined markedly in Uganda and moderately in Kenya between September and November 2025, while remaining elevated in Rwanda and relatively firm in Tanzania. The divergence reflects uneven seasonal supply recovery across the region, with Uganda benefiting from new harvest inflows, Kenya adjusting amid institutional procurement dynamics, and Rwanda and Tanzania experiencing gradual price increases and cross-border demand pressures.

The country-level patterns showed maize price volatility in Kenya, relatively stable prices in Uganda, persistent high prices in Rwanda, and relatively stable prices in Tanzania. While prices generally declined from September to November in Kenya and Uganda, wholesale prices in Rwanda and Tanzania remained unchanged. Despite short-term price declines in some markets, maize prices across the region remained elevated, indicating continued tightness and uneven adjustment across East African markets, as shown in Figure 1.

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

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

In Kenya, maize prices declined markedly at both retail and wholesale levels over the period. Retail prices declined by 7% from USD 482/MT in September 2025 to USD 448/MT in November 2025. Despite this short-term easing, retail prices in November 2025 remained 17% higher than the USD 384/MT recorded in November 2024, indicating that price levels remain elevated relative to the previous year. From September to November, wholesale maize prices in Kenya declined by 9.4%, from USD 389/MT in September to USD 353/MT in November. However, wholesale prices remained 23% above the November 2024 level of USD 288/MT, likely due to supply constraints.

From September to November, Uganda experienced declining maize prices at both retail and wholesale levels, with year-on-year declines more pronounced. Retail prices declined by 8.4% from USD 327/MT in September 2025 to USD 299/MT in November 2025. On a year-on-year basis, retail prices were 19% lower than the USD 367/MT recorded in November 2024, suggesting improved production relative to last year. Wholesale prices in Uganda also declined steadily by 7.8%, falling from USD 280/MT in September to USD 258/MT and were 21% below the November 2024 average of USD 328/MT. This pattern indicates relatively strong domestic supply conditions and downward pressure across the maize value chain.

In Tanzania, wholesale maize prices increased modestly over the period, rising from USD 303/MT in September 2025 to USD 312/MT in November 2025, a 3% increase. Compared to November 2024, wholesale prices were 16% higher than the USD 270/MT recorded a year earlier, indicating continued upward pressure and likely supply challenges. Rwanda had seen wholesale maize prices rise over the three months. Prices increased from USD 412/MT in September 2025 to USD 431/MT in November 2025, reflecting a 4.6% increase. Although year-on-year comparison data are not available, the sustained increase and high absolute price level suggest tightening supply conditions and strong exposure to regional price transmission.

Maize prices eased notably in Kenya and Uganda between September and November 2025, particularly at the retail level, while Tanzania and Rwanda continued to experience upward pressure at the wholesale level. Year-on-year comparisons highlight a divergence across the region, with maize prices remaining well above November 2024 levels in Kenya and Tanzania, but falling below last year's levels in Uganda. These contrasting trends underscore the importance of country-specific supply dynamics and regional trade flows in shaping maize price outcomes across East Africa.

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

Commodity	Country	Market Levels	Monthly Average Prices September 2025	Monthly Average Prices October 2025	Monthly Average Prices November 2025	% Change	Monthly Average Prices November 2024	Monthly Average Price % Change between November 2024 and November 2025
Maize	Kenya	Retail	482	455	448	-7.0%	384	17%
Maize	Uganda	Retail	327	320	299	-8.4%	367	-19%
Maize	Kenya	Wholesale	389	359	353	-9.4%	288	23%
Maize	Uganda	Wholesale	280	274	258	-7.8%	328	-21%
Maize	Tanzania	Wholesale	303	317	312	3.0%	270	16%
Maize	Rwanda	Wholesale	412	433	431	4.6%		

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

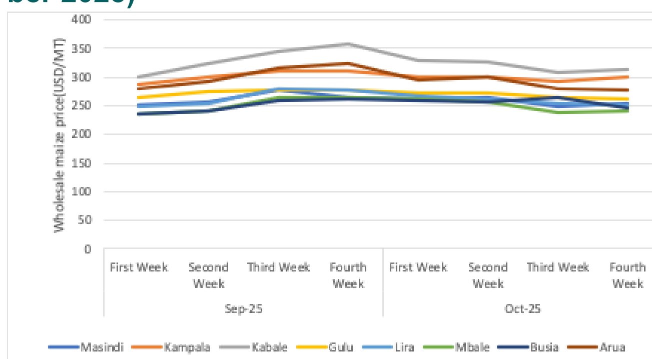
Monthly average wholesale maize prices across major Ugandan markets between September and November 2025 show clear spatial price differentiation and a general easing of prices toward November, reflecting seasonal supply improvements and inter-regional market adjustment (Figure 2). In September 2025, wholesale maize prices were highest in Kabale, followed by Arua and Kampala. These elevated prices suggest tighter supply conditions in the southwestern and northwestern markets and higher transaction costs in Kampala, the main consumption hub. Intermediate price levels were observed in Gulu and Lira. In contrast, relatively lower prices were recorded in surplus-adjacent markets such as Masindi (USD 263/MT), Mbale (USD 251/MT), and Busia (USD 250/MT).

In October 2025, wholesale maize prices declined across most markets, suggesting improved supply. Kabale remained the highest-priced market, though the monthly average eased to USD 320/MT. Kampala prices declined slightly to USD 299/MT, while Arua averaged USD 288/MT. Prices in northern and eastern markets also softened, with Gulu averaging USD 267/MT, Lira USD 259/MT, Mbale USD 250/MT, and Busia USD 256/MT. Masindi recorded a moderate decline to USD 257/MT, reinforcing its position as a lower-priced supply-oriented market.

By November 2025, wholesale maize prices had declined further and converged across markets, indicating broad-based seasonal easing. Kabale's monthly average fell sharply to USD 285/MT, while Kampala prices stabilized at USD 304/MT, remaining relatively elevated compared to other markets. Arua averaged USD 259/MT, while prices in Gulu and Lira declined to USD 251/MT and USD 244/MT, respectively. The lowest prices were observed in Masindi (USD 244/MT), Mbale (USD 238/MT), and Busia (USD 239/MT), consistent with improved supply conditions and proximity to production areas.

Overall, the monthly averages confirm persistent spatial price dispersion in Uganda's wholesale maize market, with Kabale and Kampala consistently recording higher prices, and Masindi, Mbale, and Busia remaining lower-priced markets. The steady decline in prices from September to November across most markets reflects seasonal supply recovery and improved market integration, with important implications for inter-regional trade flows and food price stability.

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



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

Kenya

Monthly average wholesale maize prices across Nairobi, Meru, and Kirinyaga between September and November 2025 show clear and persistent spatial price differentials, reflecting differences in market function, demand intensity, and proximity to surplus production areas (Figure 3).

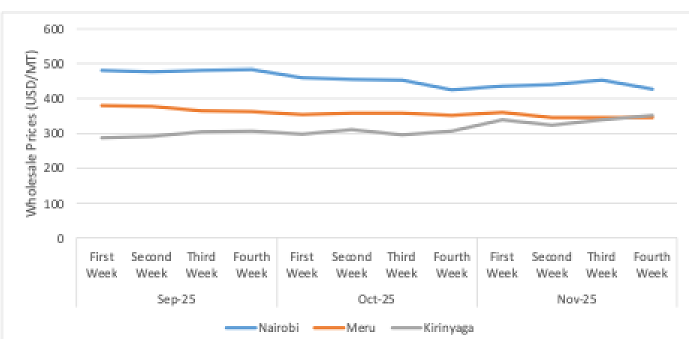
In September 2025, Nairobi recorded the highest average wholesale maize price at approximately USD 482/MT, confirming its role as a high-price terminal market driven by strong consumption demand and higher transaction costs. Meru posted a lower monthly average of about USD 372/MT, while Kirinyaga recorded the lowest average price at roughly USD 298/MT, consistent with its closer proximity to maize-producing zones.

In October 2025, wholesale maize prices declined across all three markets, indicating a broad-based easing. Nairobi's monthly average fell to around USD 450/MT, while Meru declined to approximately USD 356/MT. Kirinyaga's average price increased slightly from September to about USD 304/MT, narrowing the price gap with Meru. The overall October decline, particularly in Nairobi, suggests improved supply availability and seasonal market adjustment.

In November 2025, prices rebounded modestly in Nairobi and Kirinyaga, while remaining relatively stable in Meru. Nairobi's monthly average increased to approximately USD 440/MT, though it remained below the September peak. Meru prices stabilized at around USD 351/MT, indicating limited volatility and steady local supply conditions. Kirinyaga recorded a more pronounced increase, with the monthly average rising to about USD 339/MT, the highest level observed for this market during the three months, suggesting tightening local supply or stronger inter-market demand pull.

Overall, the monthly averages confirm a consistent price hierarchy, with Nairobi the highest-priced market, Meru in an intermediate position, and Kirinyaga the lowest-priced but increasingly firming market toward November. The October price dip, followed by a partial recovery in November, highlights ongoing seasonal adjustment and spatial price transmission within Kenya's wholesale maize market.

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



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

Tanzania

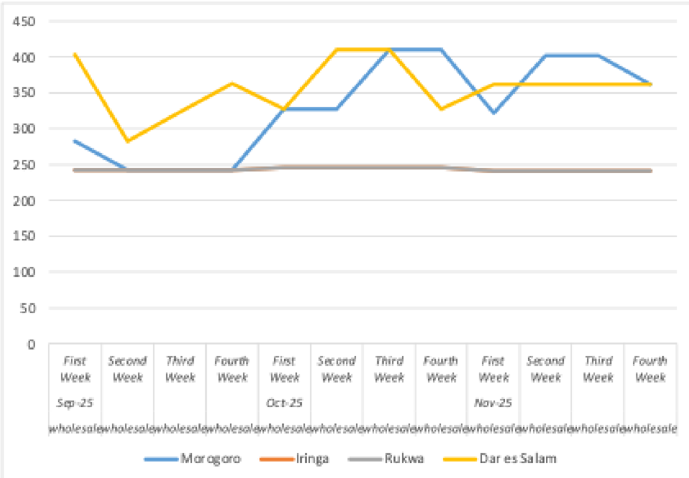
Monthly average wholesale maize prices across selected Tanzanian markets, Morogoro, Iringa, Rukwa, and Dar es Salaam, between September and November 2025, reveal clear spatial price differentiation and distinct market roles, particularly between surplus-producing regions and major consumption centers (Figure 4).

In September 2025, wholesale maize prices were highest in Dar es Salaam, where the monthly average was approximately USD 343/MT, reflecting its role as a terminal consumption market with higher transport and distribution costs. Morogoro recorded a considerably lower monthly average of about USD 252/MT, while prices in the surplus-producing regions of Iringa and Rukwa were notably lower, at USD 242/MT, indicating ample local supply and limited market pressure.

In October 2025, wholesale maize prices increased sharply in both Morogoro and Dar es Salaam. Morogoro's monthly average rose to approximately USD 369/MT, matching the average in Dar es Salaam (USD 369/MT). This convergence suggests stronger price transmission between Morogoro and the coastal market, likely driven by increased inter-market flows or tightening supply conditions. In contrast, prices in Iringa and Rukwa remained stable at USD 246/MT, reinforcing their position as lower-priced, supply-oriented markets with limited volatility. By November 2025, wholesale maize prices remained elevated in Morogoro and Dar es Salaam, while easing slightly in the surplus regions. Morogoro recorded a monthly average of approximately USD 372/MT, marginally above October levels, while Dar es Salaam averaged USD 362/MT, indicating sustained demand pressure in the urban market. In contrast, Iringa and Rukwa recorded lower and stable monthly averages of USD 241/MT, reflecting continued supply availability and weak upward pressure.

Overall, the monthly averages highlight a persistent price gradient in Tanzania's wholesale maize market, with Dar es Salaam and Morogoro consistently recording higher prices, and Iringa and Rukwa remaining structurally lower-priced. The sharp price increase observed in October, followed by sustained high levels in November, points to seasonal tightening and strong spatial price transmission between inland supply corridors and coastal consumption markets. These dynamics have important implications for inter-regional trade flows and food price monitoring in Tanzania.

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



Source: Weekly Market Bulletin, Ministry of Agriculture, Tanzania

Changing Rice Prices in East Africa

Over the three-month period, rice prices remained elevated across all countries, with retail prices consistently exceeding wholesale prices in Kenya and Uganda. Kenya maintained the highest price levels overall, particularly at the retail level, while Uganda recorded the clearest upward momentum over time. Rwanda's wholesale prices remained structurally high but relatively stable, while Tanzania's wholesale prices showed firm but moderate strength. Despite week-to-week volatility, the overall pattern suggests sustained regional tightness and uneven market adjustments.

Kenya

Between September and November 2025, rice prices in Kenya remained consistently high, with notably high margins between wholesale and retail prices. In September, wholesale prices increased from USD 1,142/MT to USD 1,186/MT, while retail prices fluctuated between USD 1,363/MT and USD 1,409/MT. In October, wholesale prices peaked at USD 1,232/MT in the second week before easing to USD 1,167/MT, while retail prices declined mid-month to USD 1,334/MT before stabilizing around USD 1,358/MT. In November, wholesale prices ranged between USD 1,196–1,232/MT, while retail prices remained elevated between USD 1,349–1,397/MT.

Uganda

Uganda exhibited a gradual upward increase in rice prices over the period, particularly at the retail level. In September, wholesale prices rose from USD 931/MT to USD 953/MT, while retail prices increased from USD 1,038/MT to USD 1,056/MT. In October, wholesale prices peaked at USD 975/MT in the third week, then declined to USD 926/MT, while retail prices reached USD 1,082/MT before easing to USD 1,031/MT. In November, wholesale prices rebounded from USD 941/MT to USD 988/MT, while retail prices increased steadily to USD 1,098/MT, the highest level observed during the period. This consistent upward movement suggests tightening supply conditions and strong consumer demand.

Rwanda

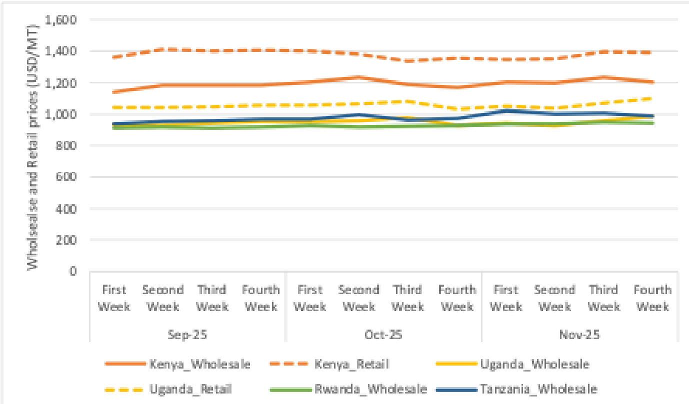
Rwanda recorded high and relatively stable wholesale rice prices throughout September, October, and November. In September, prices ranged from USD 912 to 919/MT, while in October they remained between USD 919 and 925/MT, with minor weekly variation. In November, prices increased slightly, peaking at USD 945/MT before easing to USD 943/MT. Although week-to-week movements were modest, the gradual increase from September to November indicates persistent strength and limited downward adjustment in Rwanda's wholesale rice market.

Tanzania

There was moderate price volatility in Rice in Tanzania. In September, prices increased steadily from USD 935/MT to USD 969/MT. In October, prices peaked at USD 997/MT in the second week, then eased to USD 970/MT. In November, wholesale prices remained elevated, reaching USD 1,019/MT in the first week and fluctuating between USD 989 and 1,008/MT thereafter. Compared with Uganda and Rwanda, Tanzania's wholesale prices were higher but remained below Kenya's, reinforcing its intermediate position in the regional rice market. The upward pressure aligns with broader regional dynamics, including import delays, currency pressures, and sustained demand (World Bank, 2025).

Generally, rice prices remained elevated across East Africa between September and November 2025, with Kenya maintaining the highest retail levels, Uganda showing the clearest upward momentum, Rwanda remaining structurally firm, and Tanzania recording notable increases in wholesale prices. The persistence of high price levels across markets indicates continued regional tightness and limited short-term correction.

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

The monthly average rice prices across Kenya, Uganda, Tanzania, and Rwanda between September and November 2025 display divergent price trajectories, reflecting differences in supply conditions, import dependence, and regional price transmission dynamics (Table 2).

In Kenya, rice prices declined notably over the period at both retail and wholesale levels. Retail prices eased from USD 1,395/MT in September 2025 to USD 1,275/MT in November 2025, representing an 8.6% decline. On a year-on-year basis, retail prices in November 2025 were 5% lower than the USD 1,347/MT recorded in November 2024, indicating a clear easing of price pressures. Wholesale prices in Kenya followed a similar downward trend, declining by 5.3% from USD 1,174/MT in September to USD 1,112/MT in November, and stood 7% below the November 2024 level of USD 1,191/MT. The simultaneous decline at both market levels suggests improved supply conditions or reduced import cost pressures toward the end of the period.

Uganda exhibited a contrasting pattern, with rice prices increasing modestly over the same period. Retail prices rose from USD 1,046/MT in September 2025 to USD 1,063/MT in November 2025, reflecting a 1.7% increase. Compared to November 2024, retail prices were 17% higher, indicating persistent inflationary pressure. At the wholesale level, prices increased by 1.5% from USD 939/MT in September to USD 953/MT in November, but were substantially higher than the USD 704/MT recorded in November 2024. This sharp year-on-year rise highlights continued supply tightness and strong demand in the Ugandan rice market.

In Tanzania, wholesale rice prices increased steadily by 5.6% over the period, rising from USD 954/MT in September 2025 to USD 1,007/MT in November 2025. On a year-on-year basis, November 2025 prices were 28% higher than the USD 785/MT recorded in November 2024, indicating sustained upward pressure driven by domestic supply constraints or strong regional demand.

Rwanda also recorded a moderate increase in wholesale rice prices. Prices rose from USD 916/MT in September 2025 to USD 941/MT in November 2025, reflecting a 2.7% increase over the period. While year-on-year comparison data are not available, the consistent upward movement suggests tightening supply conditions and continued exposure to regional price transmission effects.

Therefore, the data point to a clear divergence in rice price dynamics across the region. Kenya experienced a broad-based easing of rice prices into November 2025, while Uganda, Tanzania, and Rwanda recorded continued increases, particularly at the wholesale level. Year-on-year comparisons underscore that, despite recent declines in Kenya, rice prices remain significantly higher than in 2024 in Uganda and Tanzania, highlighting persistent structural and inflationary pressures in regional rice markets, with implications for food affordability and cross-border trade flows.

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

Country	Market Levels	Monthly Average Prices September 2025	Monthly Average Prices October 2025	Monthly Average Prices November 2025	% Change September to November 2025	Monthly Average Prices November 2024	Monthly Average Price % Change between November 2024 and November 2025
Kenya	Retail	1395	1396	1275	-8.6%	1347	-5%
Uganda	Retail	1046	1058	1063	1.7%	907	17%
Kenya	Wholesale	1174	1197	1112	-5.3%	1191	-7%
Uganda	Wholesale	939	952	953	1.5%	704	35%
Tanzania	Wholesale	954	974	1007	5.6%	785	28%
Rwanda	Wholesale	916	923	941	2.7%		

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

Monthly average prices for imported Rice in Uganda between September and November 2025, disaggregated by Pakistan-origin and Tanzania-origin Rice, show clear price differentiation by origin and market, with prices easing toward November.

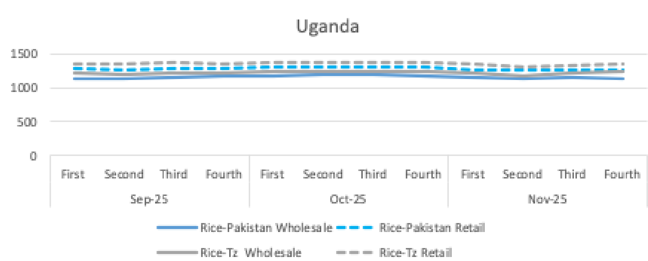
In September 2025, Pakistan-origin Rice recorded a monthly average wholesale price of approximately USD 1,153/MT, while the corresponding retail price averaged USD 1,280/MT. Tanzania-origin rice was priced higher, with a wholesale monthly average of about USD 1,213/MT and a retail average of USD 1,350/MT. The consistent premium on Tanzania rice reflects stronger consumer preference, higher regional sourcing costs, and tighter supply conditions relative to Pakistan imports.

In October 2025, prices for both rice origins rose further, suggesting stronger demand or tighter market conditions. Pakistan-origin rice wholesale prices rose to a monthly average of about USD 1,186/MT, while retail prices increased to approximately USD 1,304/MT. Tanzania-origin rice maintained its price premium, with wholesale prices averaging USD 1,239/MT and retail prices rising to about USD 1,371/MT, the highest level observed during the three months. This broad-based increase suggests strong price transmission across the rice value chain during October.

By November 2025, rice prices eased across both origins and market levels. Pakistan-origin rice wholesale prices declined to a monthly average of approximately USD 1,143/MT, while retail prices fell to about USD 1,258/MT. Tanzania-origin rice prices also moderated, with wholesale prices averaging USD 1,206/MT and retail prices declining to around USD 1,331/MT. Despite this easing, Tanzania-origin rice continued to command a clear premium over Pakistan-origin rice at both wholesale and retail levels.

Overall, the monthly averages indicate that imported rice prices in Uganda peaked in October 2025, while Tanzania-origin rice eased in November and was consistently priced above Pakistan-origin rice throughout the period. The persistence of this price differential underscores differences in sourcing costs, consumer preferences, and regional supply dynamics. At the same time, the November decline suggests partial market adjustment and improved availability toward the end of the period.

Figure 6: Weekly average wholesale and retail prices of imported rice varieties in Uganda (September – November 2025)



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

Monthly average prices for Pakistan-origin rice in Kenya between September and November 2025 show an initial easing in October, followed by relative stabilization in November, with retail prices remaining consistently higher than wholesale prices throughout the period.

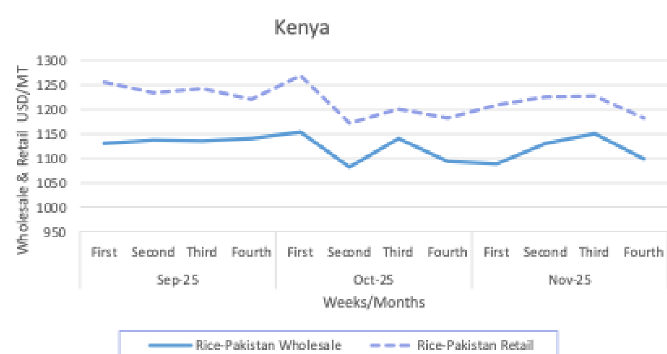
In September 2025, Pakistan rice recorded a monthly average wholesale price of approximately USD 1,136/MT, while the corresponding retail price averaged about USD 1,238/MT. These elevated levels reflect sustained import costs and firm consumer demand at the start of the period.

In October 2025, prices declined across both markets. The monthly average wholesale price fell to about USD 1,117/MT, while the retail price declined to approximately USD 1,207/MT. This downward adjustment suggests a temporary easing of import or distribution costs, or a short-term softening in market demand.

By November 2025, wholesale prices stabilized, averaging about USD 1,117/MT, broadly unchanged from October. Retail prices increased marginally to a monthly average of approximately USD 1,211/MT, indicating mild firming at the consumer level despite stable wholesale conditions. The persistence of the wholesale–retail margin underscores the continued influence of handling, transport, and distribution costs in Kenya's rice market.

Overall, the monthly averages indicate that Pakistan-origin rice prices in Kenya eased from September to October 2025 and then stabilized in November. While wholesale prices remained broadly flat toward the end of the period, retail prices showed slight upward pressure, suggesting continued cost pass-through along the value chain.

Figure 7: Weekly average wholesale and retail prices of imported rice varieties in Uganda (September – November 2025)



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

Monthly average wholesale prices for imported Rice in Rwanda between September and November 2025, disaggregated by Tanzania No. 1, Thailand, and Pakistan origins, show clear and persistent price differentiation by source, alongside a marked increase in overall prices toward November.

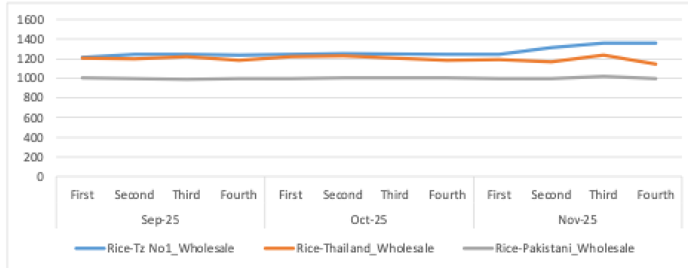
In September 2025, Tanzania No.1 rice recorded the highest monthly average wholesale price at approximately USD 1,240/MT, closely followed by Thailand-origin rice at about USD 1,203/MT. Pakistan-origin Rice remained significantly cheaper, averaging around USD 996/MT. This price hierarchy reflects differences in quality, sourcing costs, and consumer preferences in the Rwandan market.

In October 2025, wholesale prices remained elevated across all origins, with limited month-to-month movement. Tanzania No.1 rice averaged approximately USD 1,248/MT, indicating continued tight supply conditions. Thailand-origin Rice recorded a monthly average of about USD 1,213/MT, while Pakistan-origin rice averaged roughly USD 998/MT. The persistence of the price spread across origins suggests stable relative demand and limited substitution between rice types.

By November 2025, wholesale rice prices had increased sharply, particularly for Tanzania No. 1 rice. Monthly average prices for Tanzania No. 1 rice rose to approximately USD 1,320/MT, a substantial increase from September and October levels. Thailand-origin rice prices, by contrast, declined slightly to an average of about USD 1,185/MT, while Pakistan-origin rice increased modestly to approximately USD 1,001/MT. This divergence indicates stronger upward pressure on regional Tanzanian supplies relative to overseas imports.

The monthly averages confirm a consistent price ranking in Rwanda's wholesale rice market, with Tanzania No. 1 rice remaining the most expensive, followed by Thailand- and Pakistan-origin rice as the lowest-priced options. The pronounced increase in Tanzania No.1 rice prices in November points to tightening regional supply conditions and strong cross-border price transmission, in addition to higher fuel prices following a review by the Rwanda Utilities Regulatory Authority (RURA). Petrol increased by Frw 127 to Frw 1,989 per liter, while diesel rose by Frw 92 to Frw 1,900. The new prices took effect on November 8, 2025, following rising global fuel trends. (RURA,2025)

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



Source: Analysis using data from eSoKo website for Rwanda

Summary and Future Outlook

Between September and November 2025, Kenya and Uganda recorded a notable decline in maize prices, driven by a seasonal recovery in supply and market adjustments. However, these declines did not fully reverse earlier price pressures, and year-on-year prices remained high in Kenya. In contrast, Rwanda and Tanzania experienced sustained firmness in wholesale prices, reflecting tighter supply conditions and stronger regional demand, underscoring the uneven nature of maize market adjustment across East Africa.

For Rice, price dynamics were more uniformly upward-biased. Kenya recorded a clear easing in both wholesale and retail prices toward the end of November, suggesting improved availability or lower import pressures. By contrast, Uganda, Tanzania, and Rwanda experienced continued increases, with particularly strong year-on-year inflation in Uganda and Tanzania, indicating persistent structural and demand-driven pressures in regional rice markets.

The price changes observed in November highlighted the vulnerability of staple food markets to supply shocks, policy changes, and regional demand pressures. Despite some seasonal relief, Maize and rice prices remain sensitive to weather performance, fuel costs, exchange-rate movements, and evolving market regulation, with important implications for food affordability and regional food security heading into early 2026.

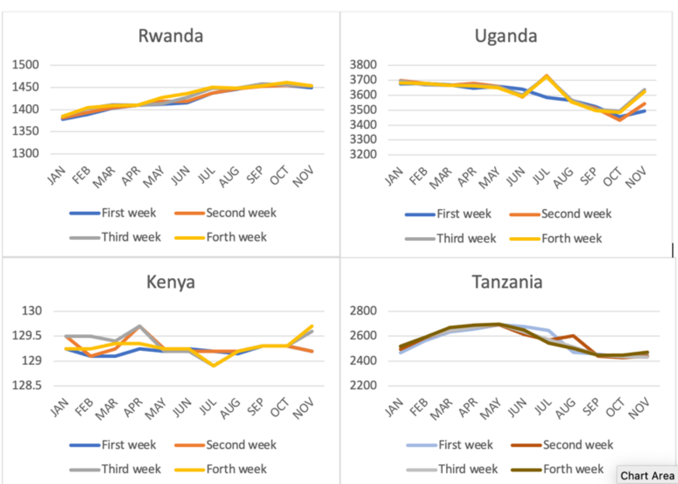
The first agricultural season in Rwanda faces heightened risk due to poor and erratic short rains in late 2025, with rainfall about 30% below the long-term average, particularly in the Eastern Province. These conditions may reduce crop yields to be harvested between December 2025 and January 2026 and could place upward pressure on food prices according to the FAO Global Information and Early Warning System (GIEWS,2025)

According to the Rwanda Agriculture and Animal Resources Development Board, Rwanda is also advancing plans to release new rice varieties to rival imported long-grain Rice in quality and consumer appeal, thus strengthening local production, reducing reliance on imports, and supporting national food security (Rwanda Agriculture and Animal Resources Development Board, 2025)

Tanzania's headline inflation eased slightly to 3.4% in November 2025, driven mainly by a moderation in food inflation, which may offer some short-term relief to consumer food price pressures (Carvalho, 2025). However, the continued acceleration in transport inflation suggests that marketing and distribution costs may still limit the pace of declines in staple food prices, even as fuel cap prices remained unchanged in November (Energy and Water Utilities Regulatory Authority, EWURA, 2025).

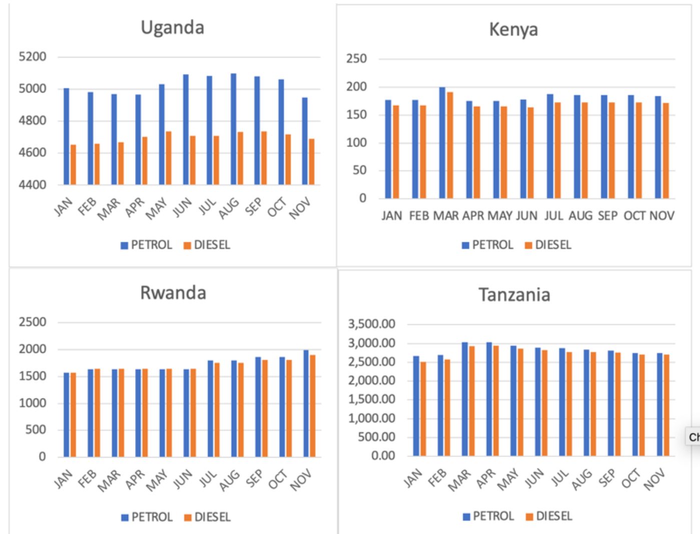
In Uganda, the late-November 2025 dry spell that damaged maize crops in several central districts is likely to constrain supplies and push up maize prices in early 2026, potentially increasing food security risks if rainfall remains below normal (Daily Monitor, 2025).

Figure 9: Weekly average evolution of exchange rates of local currencies and the Dollar in East Africa (January – November 2025)



Source: Bank of Uganda website

Figure 10: Weekly average wholesale and retail prices of imported rice varieties in Rwanda (September – November 2025)



Source: National Statistics Bureaus of the respective countries

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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