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# FOOD PRICE MONITOR: MAIZE AND RICE IN EAST AFRICA

OCTOBER 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 and Rwanda recorded the highest maize prices, while Uganda remained the lowest and most stable, and Tanzania had moderate increases.
- Rice prices increased in all countries, with Kenya consistently having the most expensive market and the strongest price growth was in Rwanda and Tanzania.
- Rwanda's removal of administered price controls may expose maize and rice prices to market forces and regional supply conditions more directly, increasing the risk of short-term price swings, especially during periods of tight availability.
- In Tanzania, large public grain procurement is likely to absorb market supply, which might tighten regional supplies, alter cross-border trade flows, and put upward pressure on prices in neighboring countries in the short term.
- Monthly average data show that imported rice prices increased across the region between August and October 2025.

## Changing Maize Prices in East Africa

Across all countries, maize prices remained elevated, with clear differences in price levels and volatility. Kenya and Rwanda consistently recorded the highest prices, while Uganda remained the lowest-priced market, and Tanzania occupied a middle position. Retail prices were uniformly higher than wholesale prices, reflecting marketing and distribution costs across markets. The general pattern showed that seasonal pressure eased toward October, but no sharp price corrections were observed, indicating continued tightness in regional maize markets.

Figure 1 shows weekly trends in wholesale and retail maize prices for Kenya, Uganda, Rwanda, and Tanzania between August, September and October 2025.

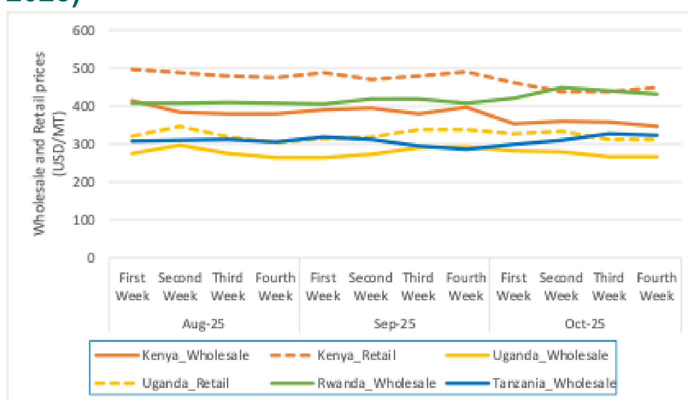
In Kenya, the monthly average wholesale maize price over the three-month period stood at USD 378/MT, while the corresponding retail price averaged USD 471/MT. These prices were consistently higher than those observed in neighbouring countries. The wide gap between wholesale and retail prices further suggests significant transaction margins within the Kenyan maize market. Although improved seasonal supplies helped ease wholesale prices in some markets during August and September 2025, rising diesel landed costs over the same period likely increased transport and distribution expenses, particularly for movements from surplus to deficit areas. As a result, retail maize prices showed slower adjustment, with fuel-related costs continuing to influence margins even after pump prices were held constant in the October pricing cycle by the Energy and Petroleum Regulatory Authority (EPRA,2025)

Uganda had the lowest wholesale maize prices among the four countries, at a monthly average of USD 277/MT, while the average retail price was USD 323/MT. The comparatively low wholesale price indicates relatively favorable supply conditions, especially high domestic production. The narrower wholesale and retail margins relative to Kenya indicate lower consumer-level competition.

Rwanda's wholesale maize prices were notably higher than those in Uganda and Tanzania, averaging USD 416/MT. This places Rwanda as the second-highest priced market after Kenya. The elevated price level reflects supply constraints, especially from the strong and sustained demand from the poultry sector, driven by rising domestic feed requirements as reported by the Food and Agriculture Organisation of the United Nations' Global Information and Early Warning System brief (2025) and a stronger dependence on cross-border maize supplies, making the market more sensitive to regional price transmission.

Tanzania recorded moderate and relatively stable wholesale prices compared to other countries. Prices declined slightly in September before increasing again in October, with a Monthly average wholesale price of USD 308 /MT. Overall, Tanzania's price levels were lower than those in Kenya and Rwanda but higher than in Uganda, reflecting its role as an important regional maize producer and supplier.

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

**Table 1** examines the monthly average maize prices for August, September and October 2025 in Kenya, Uganda, Tanzania, and Rwanda, and compares them with the corresponding prices from October 2024. In Kenya, retail maize prices declined steadily over the period, falling from an average of USD 484/MT in August 2025 to USD 455/MT in October 2025, a 6 percent decrease. Despite this short-term decline, retail prices in October 2025 remained 33 percent higher than in October 2024, when prices averaged USD 341/MT. This indicates that while seasonal supply-side factors may have eased prices in recent months, overall price levels remain structurally elevated compared to the previous year. The maize price data show continued strength at the producer level, aligning with reports of a North Rift maize boom and high farm-gate prices, particularly in Uasin, Gishu and neighboring surplus counties (Nation Africa, 2025). This strong local price environment, together with active buying from deficit areas, helped keep maize prices elevated beyond the North Rift, even as seasonal supplies improved.

A similar pattern is observed at the wholesale level in Kenya, where prices declined from USD 389/MT in August and September to USD 359/MT in October, a 7.7 percent month-on-month decrease, yet remained 29 percent above the October 2024 level of USD 279/MT. Improved seasonal supplies helped ease wholesale prices in some markets during August and September 2025. However, rising diesel landed costs over the same period likely increased transport and distribution expenses, particularly for movements from surplus to deficit areas. As a result, retail maize prices showed a slower adjustment, with fuel-related costs continuing to influence margins even after the Energy and Petroleum Regulatory Authority (EPRA) held pump prices constant in the October pricing cycle (EPRA, 2025).

Uganda's maize prices exhibited considerably greater stability over the same period. Retail prices averaged USD 322/MT in August, increased marginally to USD 327/MT in September, and eased slightly to USD 320/MT in October, reflecting a modest 0.6 percent decline. Compared with October 2024, retail prices were only 6 percent higher, suggesting relatively subdued inflationary pressures. Wholesale prices in Uganda followed a similarly stable trajectory, declining marginally from USD 280/MT in September to USD 274/MT in October, a 1.1 percent decrease, and remaining unchanged relative to October 2024, when prices also averaged USD 273/MT. This stability points to adequate domestic supply conditions and effective market balancing.

In Tanzania, wholesale maize prices increased modestly over the period, rising from USD 308/MT in August to USD 314/MT in October, a 1.9 percent increase. On a year-on-year basis, October 2025 prices were 14 percent higher than the USD 276/MT recorded in October 2024, indicating moderate upward pressure relative to the previous year, but less pronounced than in Kenya or Rwanda.

Rwanda recorded the strongest upward price movement among the countries reviewed. Wholesale maize prices increased from USD 407/MT in August to USD 433/MT in October, a 6.4 percent increase over the period. Compared to October 2024, when prices averaged USD 364/MT, this represents a 19 percent year-on-year increase. The sustained price rise showed tightening supply conditions and continued dependence on regional imports, making Rwanda more vulnerable to external price transmission. In addition, fuel pump prices in Rwanda increased between August and October, which may have possibly contributed to the rise in maize prices by raising transport and marketing costs along the value chain, particularly for a market that relies heavily on cross-border sourcing and long-distance movement from surplus areas.

Overall, the data indicate a short-term easing of maize prices in Kenya, persistent stability in Uganda, moderate increases in Tanzania, and notable upward pressure in Rwanda. However, year-on-year comparisons reveal that, except Uganda's wholesale market, maize prices across the region remain significantly higher than in October 2024, underscoring ongoing structural and inflationary pressures within regional staple food markets.

### Table 1: Changes in average monthly retail and wholesale price of maize in East Africa for August 2025 – October 2025

| Commodity | Country | Market Levels | Monthly Average Prices August 2025 | Monthly Average Prices September 2025 | Monthly Average Prices October 2025 | % Change- August to October | Monthly Average Prices October 2024 | Mont Aver Price Char betw Octo 2024 Octo 2025 |
|---|---|---|---|---|---|---|---|---|
| Maize | Kenya | Retail | 484 | 482 | 455 | -6.0% | 341 | 33% |
| Maize | Uganda | Retail | 322 | 327 | 320 | -0.6% | 303 | 6% |
| Maize | Kenya | Wholesale | 389 | 389 | 359 | -7.7% | 279 | 29% |
| Maize | Uganda | Wholesale | 277 | 280 | 274 | -1.1% | 273 | 0% |
| Maize | Tanzania | Wholesale | 308 | 303 | 314 | 1.9% | 276 | 14% |
| Maize | Rwanda | Wholesale | 407 | 412 | 433 | 6.4% | 364 | 19% |

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

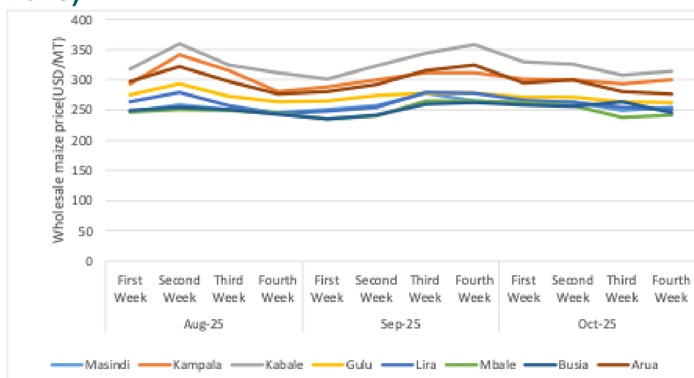
Weekly wholesale maize prices across Masindi, Kampala, Kabale, Gulu, Lira, Mbale, Busia, and Arua from August to October 2025 reveal pronounced spatial price differentials, reflecting differences in market roles, proximity to surplus production areas, and transaction and transport costs (Figure 2). Overall, Kabale and Kampala consistently recorded the highest prices, while Masindi, Mbale, and Busia remained among the lower-priced markets, consistent with their status as major maize-producing zones.

In August 2025, wholesale maize prices exhibited notable volatility across markets. Kampala prices peaked sharply at USD 341/MT in the second week, before declining to USD 280/MT by the fourth week. Kabale recorded persistently high prices throughout the month, reaching USD 360/MT in the second week, the highest level observed across all markets during August. In contrast, Masindi prices remained relatively low and stable, fluctuating narrowly between USD 246/MT and USD 259/MT, while Mbale and Busia also recorded comparatively low prices, generally below USD 255/MT by the end of the month. Northern markets such as Gulu, Lira, and Arua occupied intermediate positions, though Arua experienced a spike to USD 322/MT in the second week, suggesting localized supply pressures.

In September 2025, wholesale maize prices increased across most markets, indicating tightening supply conditions or stronger demand. Kabale prices rose steadily from USD 301/MT in the first week to USD 358/MT in the fourth week, maintaining their position as the highest-priced market. Kampala prices also increased gradually, stabilizing above USD 300 /MT by the third and fourth weeks. Masindi prices rose to USD 278/MT in the third week, then eased slightly, while Mbale and Busia prices increased modestly but remained among the lowest nationally. Arua recorded a notable increase, reaching USD 324 /MT in the fourth week, narrowing the price gap with Kampala and Kabale. Markets in the north, including Gulu and Lira, showed moderate increases, converging on USD 278 /MT by the end of the month.

By October 2025, wholesale maize prices generally softened across most markets, due to supply availability from harvests. Kampala prices declined from USD 301 /MT in the first week to USD 293 /MT in the third week, before stabilizing at USD 300 /MT in the fourth week. Kabale prices eased from USD 330/MT in the first week to USD 314/MT by the fourth week, though they remained the highest nationally. Masindi, Mbale, and Busia recorded relatively stable, lower prices, largely within the USD 241–264/MT range. Gulu and Lira prices showed limited week-to-week variation, while Arua prices declined steadily from USD 295/MT in the first week to USD 276/MT by the fourth week.

**Figure 2: Average weekly retail prices of maize in selected markets in Uganda (August – October 2025)**




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

## Kenya

Weekly wholesale maize prices across Nairobi, Meru, and Kirinyaga from August to October 2025 exhibit clear spatial price differentials and distinct intra-month dynamics. Nairobi consistently recorded the highest wholesale prices, reflecting its role as a major consumption and terminal market, while Kirinyaga remained the lowest-priced market, with Meru occupying an intermediate position throughout the period. (Figure 3)

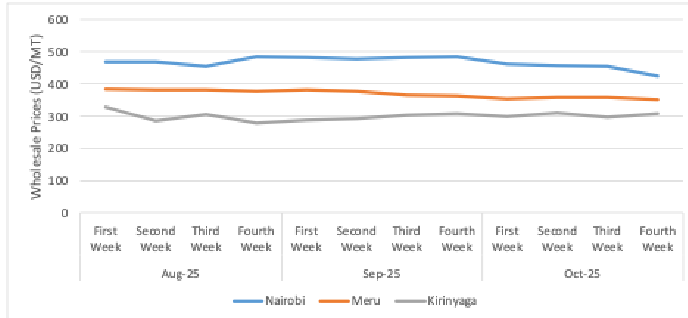
In August 2025, wholesale maize prices in Nairobi were elevated and relatively stable, fluctuating between USD 455 and USD 484/MT, with a peak in the fourth week. Meru prices remained considerably lower, with limited variation, ranging from USD 378 to USD 384/MT. Kirinyaga recorded the lowest prices but also the highest volatility during the month, declining sharply from USD 330/MT in the first week to USD 285/MT in the second week, before partially recovering to USD 307/MT in the third week and falling again to USD 278/MT in the fourth week.

In September 2025, Nairobi prices remained persistently high, hovering between USD 478 and USD 484/MT across all four weeks, indicating strong and sustained demand. Meru prices followed a gradual downward trajectory, declining from USD 381/MT in the first week to USD 364 /MT by the fourth week. In contrast, Kirinyaga prices increased steadily over the month, rising from USD 288/MT in the first week to USD 308/MT in the fourth week, narrowing the price gap with Meru and suggesting tightening local supply.

By October 2025, wholesale maize prices eased across all three markets, most notably in Nairobi, where prices declined from USD 461/MT in the first week to USD 426/MT in the fourth week, the lowest level recorded during the three-month period. Meru prices softened slightly, fluctuating within a narrower band of USD 352-358/MT. Kirinyaga prices remained relatively stable but showed mixed movements, rising to USD 311/MT in the second week before settling at USD 308/MT in the fourth week.

Overall, the observed patterns underscore Nairobi's position as a high-priced terminal market, Meru's role as a relatively stable intermediate market, and Kirinyaga's role as a lower-priced, supply-oriented market with greater short-term volatility. The general easing of prices in October across all markets shows improved supply availability toward the end of the period.

**Figure 3: Average weekly retail prices of maize in selected markets in Kenya (August – October 2025)**




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

## Tanzania

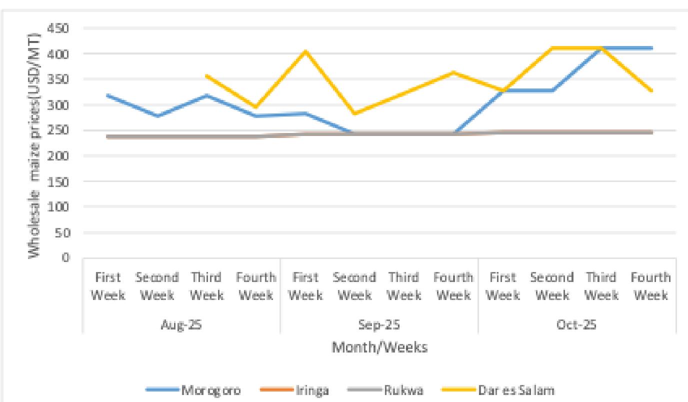
In August 2025, wholesale maize prices in Morogoro fluctuated between USD 277 and USD 317/MT, indicating moderate volatility during the month (Figure 4). In contrast, prices in Iringa and Rukwa were notably stable, remaining constant at USD 238/MT across all observed weeks. Dar es Salaam prices were substantially higher, where reported, reaching USD 357/MT in the third week before declining to USD 296/MT in the fourth week, reflecting its role as a major consumption and terminal market with higher transaction and distribution costs.

In September 2025, wholesale prices in Morogoro declined from USD 283/MT in the first week to USD 242/MT, where they stabilized for the remainder of the month. Iringa and Rukwa prices increased slightly to USD 242 /MT and remained unchanged across all four weeks, continuing to exhibit strong price stability. By contrast, Dar es Salaam recorded elevated, volatile prices, rising sharply to USD 404/MT in the first week, dropping to USD 283/MT in the second week, and then increasing again to USD 363/MT by the fourth week. This volatility underscores the market's sensitivity to supply inflows and short-term demand pressures in Dar es Salaam.

In October 2025, wholesale maize prices increased across most markets. Morogoro prices rose markedly from USD 328/MT in the first and second weeks to USD 410/MT in the third and fourth weeks, representing the highest levels observed in the market during the three-month period. Iringa and Rukwa prices increased marginally to USD 246 /MT and remained stable throughout the month, reinforcing their role as lower-priced, supply-oriented markets. Dar es Salaam prices mirrored the upward movement observed in Morogoro, increasing to USD 410/MT in the second and third weeks before easing to USD 328/MT in the fourth week.

Overall, the data highlight a clear price gradient between surplus-producing regions, such as Iringa and Rukwa, and deficit or consumption-driven markets, such as Dar es Salaam. Morogoro occupies an intermediate position but shows increasing volatility toward October, indicating tightening supply conditions in Dar es Salaam. The general increase in wholesale maize prices in October across several markets' points to seasonal supply adjustments and heightened demand pressures toward the end of the period.

**Figure 4: Average weekly retail prices of maize in selected markets in Tanzania (August – October 2025)**




Source: Weekly Market Bulletin, Ministry of Agriculture, Tanzania

## Changing Rice Prices in East Africa

Weekly wholesale and retail rice prices across Kenya, Uganda, Rwanda, and Tanzania from August to October 2025 reveal persistent cross-country price differentials, with Kenya recording the highest prices at both wholesale and retail levels, while Rwanda and Uganda remained relatively lower-priced at the wholesale level. The monthly averages further underscore clear structural differences in market conditions and price transmission across the region.

In Kenya, wholesale rice prices fluctuated over the period within a relatively wide range, averaging USD 1,186/MT. Prices declined from USD 1,238/MT in the first week of August to USD 1,140/MT in the third week, then recovered through September and peaked at USD 1,232/MT in the second week of October. Retail prices in Kenya remained consistently elevated, averaging USD 1,377/MT over the three months. Retail prices eased gradually from USD 1,405/MT in early August to USD 1,337/MT by the fourth week of August, rose again in September, and softened slightly toward the end of October. The persistent gap between wholesale and retail prices reflects substantial marketing and distribution costs in the Kenyan rice market.

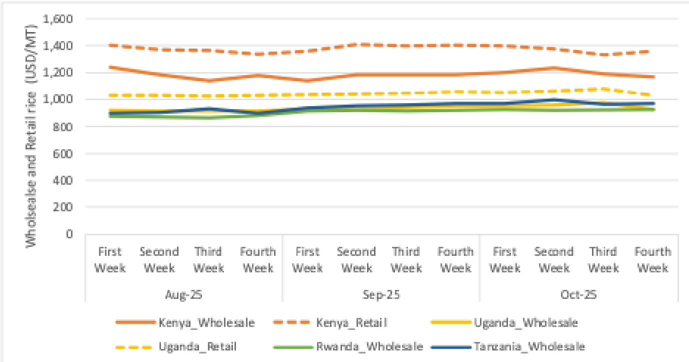
Uganda recorded lower rice prices than Kenya at both the wholesale and retail levels, with monthly averages of USD 936/MT for wholesale and USD 1,044/MT for retail. Wholesale prices showed a gradual upward trend, increasing from USD 919/MT in early August to a peak of USD 975/MT in the third week of October, then easing to USD 926/MT in the fourth week. Retail prices followed a similar pattern, rising from USD 1,032/MT in August to a high of USD 1,082/MT in the third week of October, indicating steady demand and moderate inflationary pressure in the Ugandan rice market.

Rwanda's wholesale rice prices were the lowest among the countries reviewed, averaging USD 903 /MT over the period. Prices increased steadily from USD 877/MT in the first week of August to USD 925/MT in October, suggesting reduced supply from neighboring markets. Although Rwanda remained a lower-priced market relative to Kenya, the upward movement indicates increasing pressure on domestic rice availability.

Tanzania recorded wholesale rice prices slightly above Rwanda's but below Kenya's and Uganda's, averaging USD 945/MT. Prices increased from USD 896/MT in early August to USD 969/MT by late September, then peaked at USD 997/MT in the second week of October and eased slightly thereafter. This pattern reflects moderate volatility and sensitivity to both domestic supply dynamics and regional market movements.

Rice prices across the region remained elevated throughout the period, with Kenya consistently the highest-priced market at both wholesale and retail levels. Uganda experienced steady price increases into October, Rwanda showed gradual upward pressure from a lower base, and Tanzania exhibited moderate volatility with an upward bias. These trends highlight ongoing structural and seasonal pressures in regional rice markets, with implications for food inflation, cross-border trade flows, and household food access.

**Figure 5: Weekly average wholesale and retail prices of Rice in East Africa (August – October 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.

Table 2 presents monthly average rice prices at retail and wholesale levels across selected East African countries for August to October 2025, together with year-on-year comparisons with October 2024. The data indicate a generally upward price trend across all markets, with particularly strong increases observed at the wholesale level in Rwanda and Tanzania.

In Kenya, retail rice prices increased moderately over the period, rising from an average of USD 1,369/MT in August 2025 to USD 1,396/MT in October 2025, a 2 percent increase. Despite this relatively modest short-term rise, retail prices in October 2025 remained 11 percent higher than the USD 1,255/MT recorded in October 2024, indicating sustained upward pressure compared with the previous year. At the wholesale level, rice prices in Kenya increased from USD 1,184/MT in August to USD 1,197/MT in October, a 1.1 percent increase, and were 13 percent above the October 2024 average of USD 1,063/MT.

Uganda recorded higher growth in rice prices than Kenya at both retail and wholesale levels. Retail prices rose from USD 1,029/MT in August 2025 to USD 1,058/MT in October 2025, reflecting a 2.8 percent increase, while remaining 17 percent higher than the October 2024 level of USD 907/MT. Wholesale rice prices in Uganda increased more sharply, from USD 916/MT in August to USD 952/MT in October, corresponding to a 3.9 percent increase, and were 19 percent higher than in October 2024.

Tanzania recorded one of the strongest wholesale price increases. Monthly average wholesale rice prices increased from USD 906/MT in August 2025 to USD 974/MT in October 2025, representing a 7.5 percent increase over the period. On a year-on-year basis, prices were 19 percent higher than the USD 818/MT recorded in October 2024, indicating sustained upward pressure in the Tanzanian rice market.

Rwanda also experienced notable increases in wholesale prices. Prices rose from USD 874 /MT in August 2025 to USD 923 /MT in October 2025, reflecting a 5.6 percent increase. Compared to October 2024, when prices averaged USD 724/MT, this represents a substantial 27 percent year-on-year increase, the highest among the countries reviewed.

Overall, rice prices increased across all countries between August and October 2025, with the most pronounced short-term increases observed at the wholesale level in Tanzania and Rwanda. Year-on-year comparisons show that rice prices in October 2025 were significantly higher than in October 2024 across all markets, particularly in Rwanda and Uganda. These trends point to continued inflationary pressures in regional rice markets, driven by a combination of import dependence, higher production and transport costs, and evolving regional demand dynamics.

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

| Country | Market Levels | Monthly Average Prices August 2025 | Monthly Average Prices September 2025 | Monthly Average Prices October 2025 | % Change August to October 2025 | Monthly Average Prices October 2024 | Month Avera Price Chan betwe Octob 2024 Octob 2025 |
|---|---|---|---|---|---|---|---|
| Kenya | Retail | 1369 | 1395 | 1377 | 0.6% | 1255 | 11% |
| Uganda | Retail | 1029 | 1046 | 1058 | 2.8% | 907 | 17% |
| Kenya | Wholesale | 1184 | 1174 | 1197 | 1.1% | 1063 | 13% |
| Uganda | Wholesale | 916 | 939 | 952 | 3.9% | 803 | 19% |
| Tanzania | Wholesale | 906 | 954 | 974 | 7.5% | 818 | 19% |
| Rwanda | Wholesale | 874 | 916 | 923 | 5.6% | 724 | 27% |

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

Weekly wholesale and retail prices for imported Rice in Uganda, specifically Pakistan-origin Rice and Tanzania-origin rice, remained elevated between August and October 2025, with Tanzania rice consistently priced above Pakistan rice at both market levels. The data indicate sustained demand pressure in the Ugandan rice market, alongside clear price differentiation by source of origin.

In August 2025, wholesale prices for Pakistani Rice in Uganda were relatively stable, fluctuating narrowly between USD 1,104 and USD 1,120 /MT. Retail prices ranged from USD 1,237 to USD 1,252 /MT, peaking in the third week and easing slightly toward the end of the month. During the same period, Tanzania-origin rice recorded higher prices, with wholesale prices ranging from USD 1,164 to USD 1,191/MT and retail prices between USD 1,310 and USD

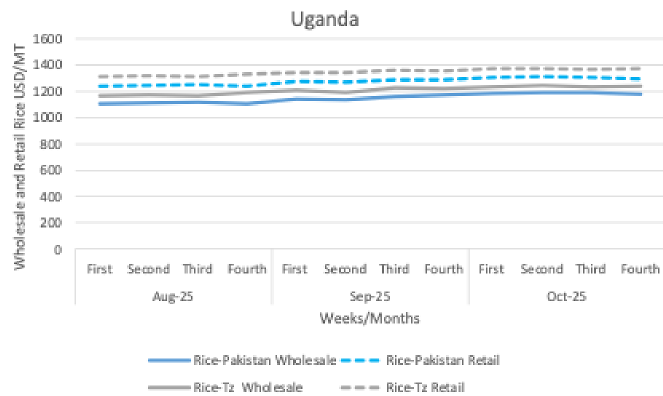
1,332/MT. The persistent premium on Tanzanian Rice reflects stronger consumer preference.

In September 2025, prices for both rice origins increased further. Wholesale prices for Pakistan rice rose from USD 1,141/MT in the first week to USD 1,172/MT in the fourth week, while retail prices increased from USD 1,276 to USD 1,287/MT over the same period. Tanzania rice experienced a more pronounced increase, with wholesale prices rising from USD 1,210/MT to USD 1,223/MT and retail prices climbing from USD 1,343/MT to USD 1,352/MT. The parallel upward movement at both wholesale and retail levels indicates strong price transmission and sustained market demand.

In October 2025, prices remained high, though some stabilization was observed toward the end of the month. Wholesale prices for Pakistan rice peaked at USD 1,192/MT in the second week, then eased slightly to USD 1,178/MT in the fourth week. Retail prices followed a similar pattern, rising to USD 1,312/MT in the second week before declining modestly to USD 1,295/MT by the end of the month. Tanzania rice continued to command higher prices, with wholesale prices ranging from USD 1,232 to USD 1,248/MT and retail prices increasing steadily to a high of USD 1,375/MT in the fourth week.

Overall, in Uganda, prices remained consistently high throughout the August–October 2025 period, with Tanzania-origin rice maintaining a clear price premium over Pakistan-origin rice at both wholesale and retail levels. The sustained wholesale–retail margins reflect ongoing import handling, transport, and distribution costs, while the upward trend into October points to continued supply tightness and strong consumer demand. These dynamics have important implications for food inflation and household purchasing power, particularly in urban markets where imported Rice is a key staple.

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




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

## Kenya

Weekly wholesale and retail prices for Pakistan-origin rice in Kenya between August and October 2025 remained elevated, with noticeable intra-month fluctuations and a persistent price gap between the wholesale and retail markets. The price movements reflect Kenya's continued dependence on imported Rice and the influence of import costs, distribution margins, and short-term demand dynamics.

In August 2025, wholesale prices for Pakistan rice increased steadily from USD 1,069/MT in the first week to USD 1,127/MT in the fourth week, indicating a gradual firming of prices during the month. Retail prices rose more sharply over the same period, increasing from USD 1,136 /MT in the first week to a peak of USD 1,232 /MT in the third week, before easing slightly to USD 1,225 /MT in the fourth week. The widening gap between wholesale and retail prices in August points to a sustained increase in marketing and distribution costs.

In September 2025, wholesale prices stabilized at higher levels, fluctuating within a narrow band between USD 1,131 and USD 1,140/MT across all four weeks. Retail prices remained elevated but showed modest variability, peaking at USD 1,255/MT in the first week and gradually declining to USD 1,221/MT by the fourth week.

In October 2025, wholesale prices initially increased to USD 1,153/MT in the first week, the highest level recorded during the three months, before declining sharply to USD 1,081/MT in the second week and settling at USD 1,094/MT by the fourth week. Retail prices mirrored this pattern, rising to USD 1,270/MT in the first week, then falling to USD

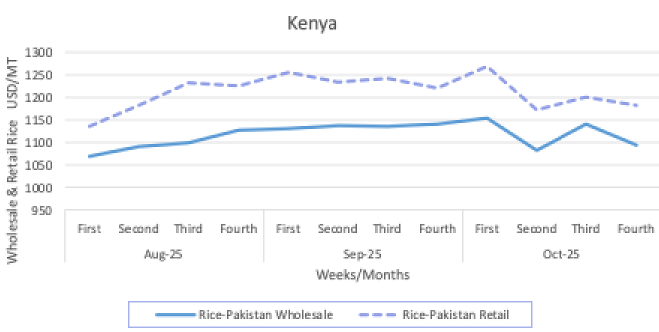
1,173/MT in the second week, and stabilizing at USD 1,182/MT toward the end of the month. The sharper adjustment at the retail level in October indicates increased price sensitivity, linked to changes in import costs and the exchange rate.

Overall, Pakistan-origin rice prices in Kenya remained consistently high throughout the August–October 2025 period, with wholesale prices generally exceeding USD 1,080/MT and retail prices above USD 1,170/MT.

Higher diesel costs between August and September raised transport costs for imported Rice. Even though fuel prices did not change in October, these earlier cost increases reduced traders' ability to lower prices, keeping rice prices high (Nation Africa, 2025).

The persistent wholesale–retail price differential underscores the role of import handling, transport, and distribution costs in shaping consumer prices. Although prices eased toward the end of October, overall levels remain elevated, with implications for food inflation and urban household purchasing power.

### Figure 7: Weekly average wholesale and retail prices of imported rice varieties in Kenya (September – October 2025)




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

## Rwanda

Weekly wholesale rice prices in Rwanda between August and October 2025 reveal clear differentiation by origin: Thailand-origin Rice consistently commands the highest prices, Tanzania No.1 rice occupies an intermediate position, and Pakistan-origin rice remains the lowest-priced import across most weeks. The data also indicate a marked upward shift in price levels beginning in September.

In August 2025, wholesale prices for Tanzania No.1 rice declined gradually from USD 989/MT in the first week to USD 976 /MT in the third week, then recovered slightly to USD 992/MT in the fourth week. Pakistan-origin Rice followed an almost identical pattern, falling from USD 989/MT to USD 976/MT before rebounding to USD 992/MT, reflecting closely aligned pricing between the two origins during this period. In contrast, Thailand-origin Rice remained significantly more expensive, with prices easing from USD 1,168/MT in the first week to USD 1,105/MT in the third week, then increasing again to USD 1,151/MT in the fourth week. This persistent premium reflects higher import costs and possible quality differentials associated with Thai Rice.

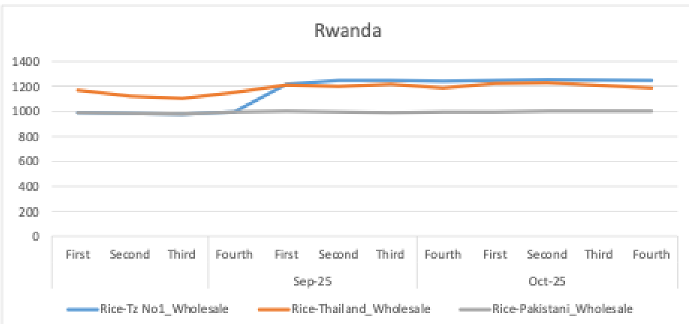
A sharp upward adjustment in wholesale prices was observed in September 2025. Tanzania No.1 rice prices increased substantially to USD 1,216 /MT in the first week and rose further to USD 1,250 /MT in the second and third weeks, before easing marginally to USD 1,242 /MT in the fourth week. Pakistan-origin Rice also increased, though at a lower level, rising to USD 1,003/MT in the first week, fluctuating between USD 985 and USD 997/MT thereafter. Thailand-origin rice prices remained the highest, increasing to USD 1,209/MT in the first week, peaking at USD 1,220/MT in the third week, and easing to USD 1,186/MT by the fourth week. The broad-based price increases across all origins point to tighter supply or stronger import-cost pass-through during the month.

In October 2025, wholesale rice prices in Rwanda remained elevated, with limited week-to-week variation. Tanzania No.1 rice prices stabilized at high levels, fluctuating between USD 1,247 and USD 1,251 /MT in the first two weeks and ending the month at USD 1,247 /MT. Thailand-origin rice prices also remained high, peaking at USD 1,231/MT in the second week before declining to USD 1,185/MT in the fourth week. Pakistan-origin rice prices increased modestly over the month, rising from USD 994/MT in the first week to USD 1,002/MT by the fourth week.

Overall, the data indicate a clear hierarchy in Rwanda's wholesale rice market, with Thailand-origin rice consistently the most expensive, followed by Tanzania No. 1 rice, and

Pakistan-origin rice the least expensive. The pronounced price escalation from August to September and the sustained high levels into October indicate increased supply constraints and strong regional price transmission. These trends have important implications for food inflation and consumer access to Rice in Rwanda, particularly given the country's reliance on imported supplies.

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




Source: Analysis using data from eSoKo website for Rwanda

## Summary and Future Outlook

Between August and October 2025, maize and rice prices across Kenya, Uganda, Rwanda, and Tanzania showed limited seasonal easing and remained above their October 2024 levels in most markets. Price movements differed across countries: Kenya and Rwanda recorded higher, more volatile prices; Uganda showed relative stability, particularly for maize; and Tanzania exhibited moderate but rising price pressures. Overall, year-on-year comparisons indicate continued upward pressure on staple food prices across the region, especially for Rice.

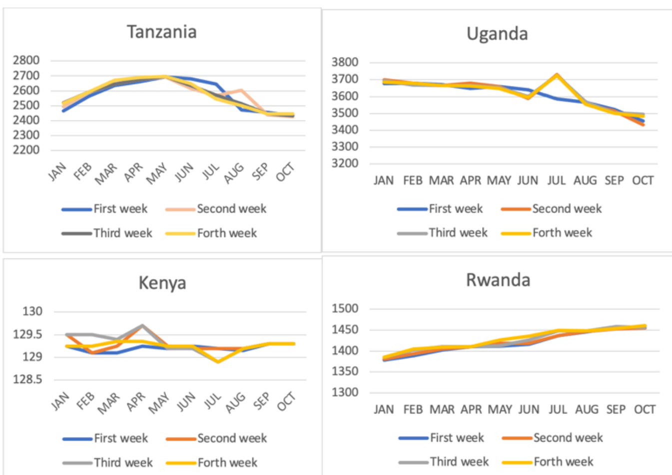
For Rice, Kenya remained the most expensive market. At the same time, Uganda, Rwanda, and Tanzania recorded steady increases, with the strongest upward movement and year-on-year inflation particularly evident in Rwanda and Tanzania at the wholesale level. Overall, prices eased slightly toward October in some markets, but year-on-year comparisons show regional staple prices remained above October 2024 levels, indicating persistent structural and cost pressures.

Ministry of Finance, Planning and Economic Development (2025) reports that inflation developments across the EAC in October 2025 were broadly stable compared to September, with only modest month-to-month changes. Inflation in Kenya remained unchanged at 4.6 percent, Tanzania increased slightly to 3.5 percent from 3.4 percent, Rwanda declined further to 5.1 percent from 6.2 percent due to easing food and services prices, while Uganda's annual headline inflation moderated to about 3.4 percent from 3.6 percent in September, largely reflecting softer food price pressures.

Policy developments might increasingly influence staple food price dynamics in the region. In Rwanda, the recent removal of government price regulation for selected agricultural commodities might lead to greater reliance on market-based price negotiation. While this shift might improve market efficiency over the medium term, it might also expose smallholder farmers to weaker bargaining power and increase the risk of short-term price volatility, particularly in markets that are structurally dependent on cross-border supplies. In the near term, the absence of administered price floors might therefore reinforce price uncertainty and upward pressure during periods of tightening regional availability (Michel Nkurunziza et al., 2025)

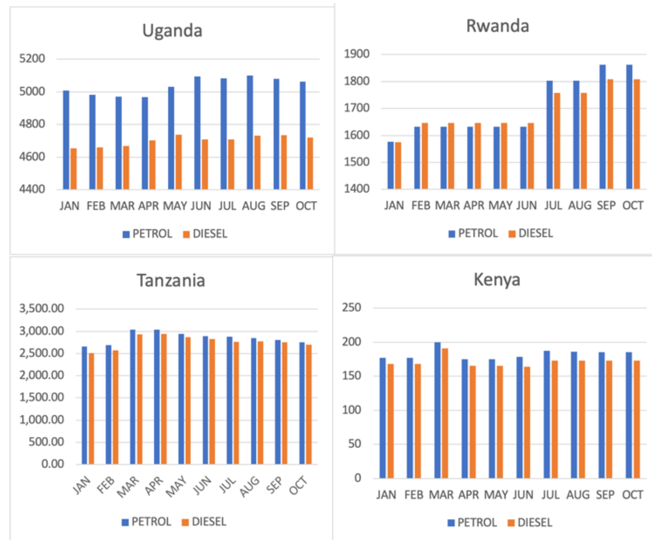
Regional demand conditions may continue to influence maize price dynamics in the coming months. In Tanzania, the launch of a large grain tender by the National Food Reserve Agency covering substantial volumes of maize and paddy Rice signals strong demand from both domestic and regional markets. While the release of public stocks could help ease local supply pressures, sustained cross-border demand may limit downward price adjustments and continue to support maize prices across the region.

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




Source: Analysis using data from eSoKo website for Rwanda

### Figure 10: Monthly average evolution of fuel prices in East Africa (January – October 2025)




Source: National Statistics Bureaus of the respective countries

In Kenya, the August–September fuel cost changes did not appear to be the primary driver of Rice and maize price movements, which were largely shaped by seasonal supply conditions. However, they likely **reinforced cost pressures along the value chain**, contributing to sustained price levels and limiting sharper retail price declines during the period.

## 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

[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)](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](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](http://www.esoko.gov.rw/esoko/Dashboard/Login.aspx?DashboardId=4&dash=true&Login=true)

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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