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FOOD PRICE MONITOR: MAIZE AND RICE IN EAST AFRICA

OCTOBER 2023

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.

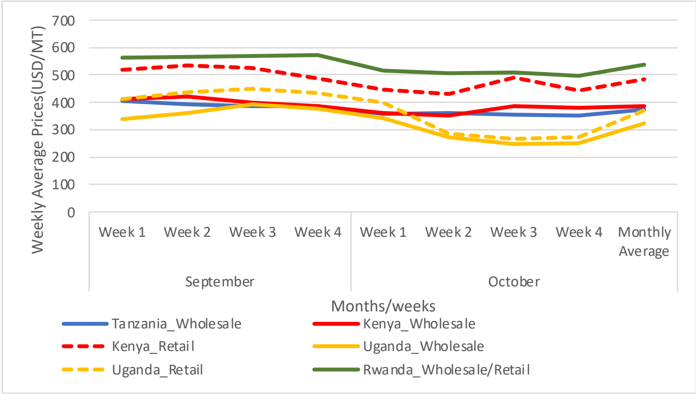
Highlights

- All countries experienced a decline in the wholesale and retail price of maize, with Uganda having the most significant decline at about 29 percent and 24 percent, respectively, attributed to the likely importation ban on maize by Kenya and South Sudan's rejection of maize from Uganda. Food price inflation in Uganda has also generally fallen and was generally lower than in the other countries.
- Bumper harvest in maize across the four East African countries explains the decline in the price of maize in the respective countries, though it is more significant in Uganda due to reduced importation of maize from neighboring countries, like Kenya's ban on imported maize.
- The average weekly wholesale and retail price of rice for Uganda, Rwanda, and Kenya declined from September to October, while prices in Tanzania remained relatively stable.
- Generally, the price of rice in October remained higher than they were one year ago as the East African countries also rely on imported rice that faced production disruptions and trade restrictions at the global scale.

Changing Maize Prices in East Africa

Uganda, Kenya, Tanzania, and Rwanda all faced a downward shift in the price of Maize from September to October (Figure 1). The prices were generally highest in Rwanda, followed by Kenya, Tanzania, and lastly Uganda. The general average price decline between September and October was the largest for Uganda compared to the other East African countries (Table 1). The wholesale price margin between Uganda and Rwanda was 45 percent t25 percent between Uganda and Kenya, and 21.8 percent between Uganda and Tanzania

Figure 1: Average wholesale and retail price of maize in East Africa (October 2023)



Source: Authors' construction using data from FSP (for Uganda and Tanzania), Ministry of Agriculture Livestock and Fisheries (for Kenya), and e-SoKo (for Rwanda).

General food price inflation remains highest in Rwanda at 33.1 percent, followed by Kenya at 7.8 percent, Tanzania at

5.6 percent, and Uganda at 2.6 percent[1]. In October, food price inflation in Uganda was the lowest followed by Tanzania and was highest in Rwanda. Food price inflation was at 2.6 percent for Uganda, 7.8 percent in Tanzania, and 5.6 percent in Rwanda (Vos et al., 2023). However, consumer price increases are outpacing food price inflation resulting into negative real food inflation in all the countries in the region. Whereas this should sound promising to net consumers of food, small scale farmers who are the suppliers of food are impacted negatively as their agriculture incomes remains lower. The East African region compares relatively better in terms of food price inflation compared to other countries (Figure 1).

Figure 2: Food price inflation, September October 2023

Source: Vos etal., 2023

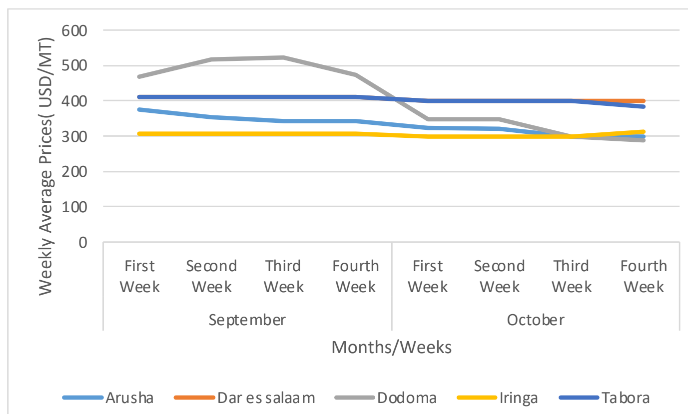
Tanzania

Tanzania also had a slight decline in prices from September to October (Figure 5). The average monthly price of maize reduced by 9.4 percent, from 393 USD/MT in September to 356 USD/MT in October. Weekly price changes were more pronounced in September, with consistent decreases observed each week, while in October, the changes were less consistent but still followed a general downward trend. Prices decreased steadily from the first week to the fourth week. From the last week of September to the first week of October, there was a 7.2 percent drop in price from 387 USD/MT to 359 USD/MT. The prices decreased due to the abundant October-to-December maize harvest in Tanzania and reduced demand from neighboring countries because of their bumper maize harvest **(**Relief Web, 2023**).**

All the domestic markets in Tanzania experienced a decline in the price of maize, with Dodoma having the highest drop of 35 percent from 495 USD/MT to 321 USD/MT. Arusha's average wholesale price dropped by 11.64 percent from 352 USD/MT to 311 USD/MT. In Iringa, the average price dropped by 1.6 percent from 308 USD/MT to 303 USD/MT. In Tabora, prices dropped by 3.65 percent, from 410 USD/MT to 395 USD/MT. Finally, Dar es salaam barely changed the average price of maize.

The Government of Tanzania intervenes in the maize market through purchases from farmers by the National Food Reserve. In a way, this intervention tries to stabilize the prices observed. Differences in prices across the domestic markets are also as a result from the Government not purchasing at a uniform price across the markets in the country. For example, this season, the National Food Reserve Agency bought maize at Tshs, 800 per kilo in regional reserve centers and 600 Tshs per kilo in peripheral areas[2].

Figure 3: Average weekly wholesale prices of maize in selected markets in Tanzania (October 2023)



Source: Authors' construction using data from the Ministry of Investment, Industry, and Trade

[1] https://www.foodsecurityportal.org/node/2630

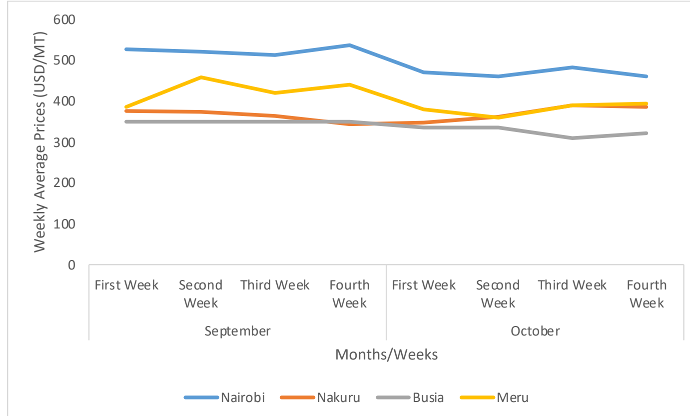
[2] https://allafrica.com/stories/202306230283.html

Kenya

In Kenya, maize prices reduced but were more stable than in September. The average wholesale price decreased by 8.8 percent from 405 USD/MT in September to 369 USD/MT in October, while the average retail price was reduced by 12.4 percent from 516 USD/MT to 452 USD/MT in October. The overall downward shift in the price of maize was attributed to the plentiful harvests in August[3] (Relief Web, 2023; Milling Middle and East Africa, 2023). Maize production was forecasted to increase from 44 million bags to 61 million bags partly because of the fertilizer subsidy program that reduced fertilizer prices by 50 percent (from Shs. 7000 to Shs. 3500) (Milling Middle and East Africa, 2023).

All the domestic markets within Kenya also experienced a decline in the monthly average price of maize from September to October. The Kenya National Bureau of Statistics also reported a reduced average price of maize flour from Ksh 179.93 in September to Ksh. 172.50 reported in October (Kenya National Bureau of Statistics, 2023). At the start of the month, the maize prices in Nairobi were at 470 USD/MT, then reduced to 460 USD/MT in the second week, then increased to 483 USD/MT and recovered to 461 USD/MT. In Nakuru, the average weekly wholesale price of maize was 348 USD/MT at the start, then increased to 361 USD/MT in the second week and then increased to 390 USD/MT in the third week and reduced a bit to 386 USD/MT in the last week. Nairobi had the highest decline from 524 USD/MT to 469 USD/MT, followed by the Meru market from 426 USD/MT to 381 USD/MT, then by Busia from 350 USD/MT to 325 USD/MT and the least being Nakuru from 364 USD/MT to 371 USD/MT. Nairobi and Meru markets had similar price trends, while Busia, the border town between Uganda and Kenya, had the lowest prices in Kenya. Bumper harvests and eased inflation, in addition to strong harvests in Kenya, led to a decline in most markets, especially in the Busia market. Bumper harvests were also attributable to the availability of rainfall and a favorable fertilizer Subsidy that reduced the price of fertilizer (AGRA, 2023; Business Daily, 2023). As reported by the Kenya National Bureau of Statistics, fuel prices also reduced by about 2.7 percent, easing transportation costs. Nairobi had the highest prices, followed by Meru, Nakuru, and the Busia market at the border of Kenya and Uganda. In October 2023, the President of Kenya issued a directive stopping the issuance of permits to importers of maize into the country, and this affected the traders and the prices, especially at the Busia market, where traders remained stranded with tonnes of maize[4]. Ugandan traders at the Busia border had surplus maize and were forced to reduce the prices[5].

Figure 4: Average weekly retail prices of maize in selected markets in Kenya (October 2023)



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

Uganda

There was a noticeable decline in maize wholesale and retail prices in Uganda from September to October. The average price of wholesale maize decreased by 24 percent from 368 USD/MT in September to 279 USD/MT in October. Similarly, there was a significant decrease in retail maize prices by 29 percent from September to October. The average retail price declined from 433 USD/MT in September to 306 USD/MT in October. Prices were highly volatile in October, with some weeks showing significant fluctuations. At the start of the month, maize wholesale price was at 341 USD/MT in the first week, dropped significantly by 20 percent to 273 USD/MT in the second week, decreased further by 9 percent to 248 USD/MT in the third week, and slightly increased by 1.6 percent to 252 USD/MT in the fourth week. Retail prices mirrored the pattern seen in wholesale prices, starting at 399 USD/MT in the first week, dropping by 28 percent to 286 USD/MT in the second week, declining further by 6.6 percent to 267 USD/MT in the third week, and slightly increased by 2.2 percent to 273 USD/MT in the fourth week.

The decline in maize prices generally aligns with the reported decrease in the inflation rate in maize by a negative 23 percent, as reported by the Uganda Bureau of Statistics[6]. Other food crops, such as onions, sugar, and rice, also slowed the inflation rate. The lower prices in October may

[3] https://www.millingmea.com/relief-for-kenya-as-bumper-harvest-looms-maize-prices-drop-by-15/

[4] https://www.newvision.co.ug/category/news/traders-hit-hard-by-kenya-maize-ban-NV_174891

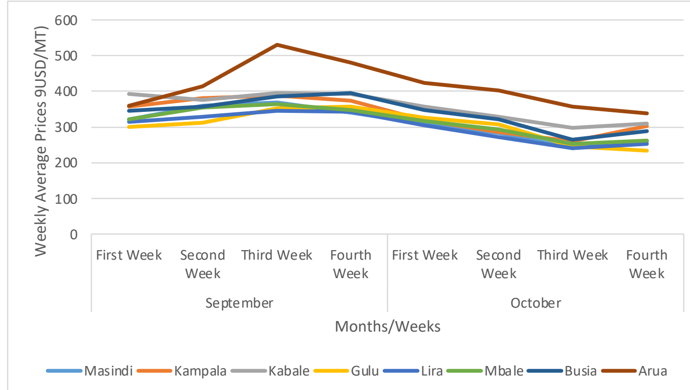
[5] https://www.newvision.co.ug/category/news/traders-hit-hard-by-kenya-maize-ban-NV_174891

[6] https://www.independent.co.ug/sugar-onions-and-maize-flour-prices-slow-down-uganda-inflation/

primarily be due to factors such as the July bumper harvests, expected higher harvests in December, and reduced importation from neighboring countries like Kenya and South Sudan amidst increased harvests. In South Sudan, Uganda's' Maize was rejected due to contamination with aflatoxins (Food Safety Africa, 2023), while Kenya also banned the importation of maize after her bumper harvest (Egesa, 2023). In Kenya, the President stopped the issuance of trade permits to importers of maize, and this affected Ugandan traders who were left with no market and excess surplus. The Kenyan Government imposed the ban despite the two countries signing a memorandum of understanding allowing Uganda to export 600,000 tonnes of maize annually to Kenya[7]. Across the major markets, there was generally a significant drop in the weekly average wholesale price of maize (Figure 3). For instance, the average wholesale price of Maize in Masindi dropped by 8.4 percent from the first to the second week, then dropped by 14 percent from the second to the third week, and only increased by 7.8 percent from the third to the last week in April. In Kampala, the prices dropped by 10.3 percent from the first to the second week, by 7 percent from the second to the third, and an increase of 13.4 percent from the third to the fourth week. Other markets followed similar trends (Figure 4), with Arua having maize's highest average wholesale price in October, followed by the Busia market. The two markets are located at the border areas of Uganda and benefit from cross-border trade. High maize prices in Kabale are driven by high transport costs for moving maize from maize-producing districts like Masindi to Kabale. Kampala had the highest drop in the price of maize, followed by the Masindi market, and Gulu had the lowest drop in price in October. All the markets except Gulu experienced a rise in the price of maize in the last week.

The drop in prices in all markets is explained by the country's bumper maize harvests and the eased inflation from 2.7 percent in September to 2.4 percent in October (Uganda Bureau of Statistics, 2023). However, prices increased last week in Masindi, Kampala, and Kabale markets because the stockiest hesitated to buy more maize to stock due to the rapidly declining prices as reported by the traders during the data collection. Despite declining prices of maize, fuel prices such as petrol and diesel increased on average by about 1.8percent from September to October. For markets in non-producing areas such as Kampala and Kabale, it was not profitable to engage in maize trading as transportation costs remained relatively high while the general price of maize decreased.

Figure 5: Average weekly retail prices of maize in selected markets in Uganda (October 2023)



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

Rwanda

In Rwanda, maize prices were characterized by a downward fluctuation, with more pronounced weekly changes than in September. Maize prices in Rwanda were the highest in the region. The average weekly price of Maize in October in was 12 percent lower than in September (568 USD/MT in September to 507 USD/MT in October). The price decline was also due to the abundance of maize stock from the season A harvest. (AGRA, 2023; Relief web, 2023).

[7] https://www.newvision.co.ug/category/news/traders-hit-hard-by-kenya-maize-ban-NV_174891

Comparison of wholesale and retail maize prices in East Africa

Uganda maize's average monthly wholesale and retail price decline between September and October was 24 percent and 29 percent, respectively (Table 1). For Kenya, wholesale and retail prices for maize were reduced by 8.8 percent and 12.5 percent, respectively. The wholesale maize price reductions for Tanzania and Rwanda were 9.3 percent and 10.3 percent, respectively. Comparing the prices in October 2023 with the same month last year, it is generally observed that average wholesale maize prices are much lower this year than in 2022 across all the countries in the region. For example, Kenya's retail and wholesale prices were 638 USD/MT and 568 USD/MT , respectively 2022, compared to 516 USD/MT and 405 USD/MT retail and wholesale prices in October 2023. The difference emanates from the high inflation reported in 2022 due to the Russian-Ukraine war, which increased fuel costs. At the Global level, the cereal price index remained nearly 15 percent below its September 2022 levels (Gustafson, 2023)[8]. According to the UN food and Agriculture Organization's (FAO) food price index, agricultural food commodity prices declined by almost 25 percent as of October 2023 largely driven by strong harvests from large food importing countries, decline in shipping costs and more affordable energy and fertilizer prices (Glauber et al., 2023)[9]. In addition, unlike 2022, this year had a bumper harvest in some countries like Kenya compared to the previous year.

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

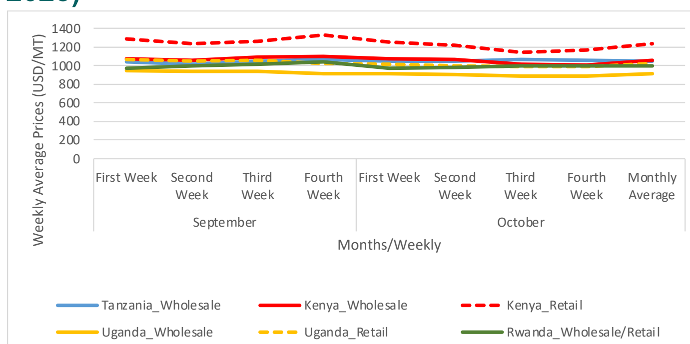
Commodity	Country	Market Levels	Monthly Average Prices September 2023 (USD/MT)	Monthly Average Prices October 2023 (USD/MT)	Monthly % Change September to October, 2023	Trends	Monthly Average Prices October 2022 (USD/MT)
	Kenya	Retail	516	452	-12.5	▼	638
	Uganda	Retail	433	306	-29.3	▼	613
	Rwanda	Retail	568	507	-10.7	▼	572
	Kenya	Wholesale	405	369	-8.8	▼	538
	Uganda	Wholesale	368	279	-24.2	▼	
	Rwanda	Wholesale	568	507	-10.7	▼	572
Maize	Tanzania	Wholesale	393	357	-9.3	▼	443
▼ = Decrease			▲= Increase		► = Constant		

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)

Changing Rice Prices in East Africa

The average weekly wholesale and retail price of rice for Uganda, Rwanda, and Kenya declined from September to October 2023 (Figure 6), although the prices remained higher than they were one year ago (Table 2). Although the East African countries produce some of the rice domestically, they also import some of the rice consumed domestically from Asian countries like Pakistan and Thailand and from neighboring EastAfrican countries like Tanzania. From the Global perspective, unlike other agricultural food commodities that have witnessed a decline in commodity prices, rice and sugar, on the other hand, had their prices rise significantly due to production disruptions caused in part by El Nino, trade restrictions, and producer country stockpiling in anticipation of potential shortages (Vos et al., 2023)[10].

Figure 6: Average daily wholesale and retail prices of imported rice in East Africa (October 2023)



Source: Authors' construction using data from RATIN (for Uganda, Tanzania, and Rwanda), and the Ministry of Agriculture and Livestock for Kenya

All the countries except Tanzania had a general decrease in rice's wholesale and retail price from September to October (Table 3). Uganda had the highest retail price decline, 6.3 percent, from 1277 USD to 1196 USD/MT, followed by Kenya at 4.2 percent, from 935 USD/MT to 896 USD/MT. For wholesale prices, Uganda experienced the highest decline by 4.9 percent, from 1048 USD/MT to 997 USD/MT, followed by Kenya by 4.2 percent, from 935 USD/MT to 896 USD/MT. Rwanda had the lowest percentage decline at 2 percent. Tanzania experienced an increase in price by 1.2 percent from 1043 USD/MT to 1055 USD/MT.

[8] https://www.foodsecurityportal.org/node/2584

[9] https://www.foodsecurityportal.org/node/2630

[10] https://www.foodsecurityportal.org/node/2630

Table 2: Monthly retail and wholesale prices changes of rice in East Africa (October 2023)

Commodity	Country	Market Levels	Monthly Average Prices September 2023 (USD/MT)	Monthly Average Prices October 2023 (USD/MT)	Monthly % Change	Trends	Monthly Average Prices October 2022(USD/MT)
Rice	Kenya	Retail	1277	1196	-6.3	▼	981
	Uganda	Retail	935	896	-4.2	▼	696
	Rwanda	Retail	1004	984	-2	▼	743
	Kenya	Wholesale	1081	1038	-3.9	▼	872
	Uganda	Wholesale	1048	997	-4.9	▼	616
	Rwanda	Wholesale	1004	984	-2	▼	743
	Tanzania	Wholesale	1043	1055	1.2	▲	644

▼ = Decrease ▲= Increase ► = Constant

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

In Kenya, rice's wholesale and retail prices declined by 3.8 percent and 6.3 percent, respectively, between September and October although Kenya's retail prices remained the highest in the region. The prices dropped from 1081 USD/MT in September to 1039 USD/MT in October, and the average retail price dropped from 1277 USD/MT in September to 1196 USD/MT in October. For weekly price changes, the wholesale price dropped by 2.5 percent from the last week of September to the first week of October. Retail prices dropped significantly by 5.7 percent from the last week of September to the first week of October.

In Uganda, the wholesale prices declined by 2.6 percent from 910 USD/MT in the first week to 886 USD/MT in the last week. The retail prices dropped by 3.25 percent from 1018 USD/MT in the first week to 985 USD/MT in the previous week. The wholesale and retail price reductions for rice are also aligned with the inflation rate decline for rice between September and October.

The average wholesale price in Tanzania increased slightly by 1.2 percent from 1043 USD/MT in September to 1055 USD/MT in October. Still, generally, the prices remained relatively stable across the weeks in Tanzania. The slight increase in rice prices in Tanzania is associated with increased fuel prices, likely increasing the price of highly consumed commodities like rice due to the high transportation cost (The Citizen, 2023).

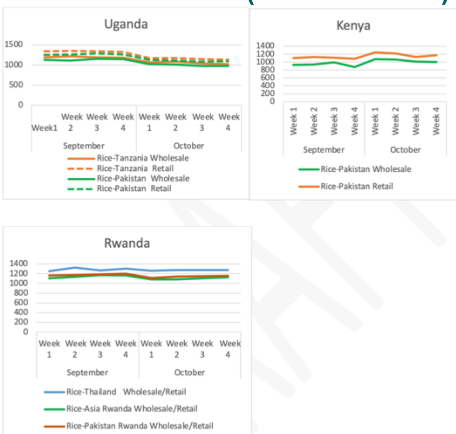
In Rwanda, the prices generally reduced in the first two weeks before recovering to the prices in September. Between the last week of September and the first week of October, prices reduced by 6.5 percent. General inflation in Rwanda reduced to 12.9% in October 2023, compared to 18.4% in September (Ministry of Finance, Planning and Economic Development, 2023).

Besides domestic production, East African countries also import rice from Tanzania, Pakistan, Thailand, and many other countries. The price of imported rice in the region is affected by several other factors, including the changes in the exchange rates, the presence of non-tariff barriers and global factors associated with production disruptions due to climatic changes and trade restrictions. Figure 6 shows the variation in the wholesale price of Pakistan rice in the four East African countries. In Uganda, the retail price for Tanzania rice varieties was the highest, followed by the retail price for Pakistan rice. Consumers have a high preference for Tanzania rice due to its rich aroma. The price for imported rice decreased from the last week of September to the first week of October. For example, Pakistan rice experienced a noticeable decline in the wholesale price by 13.3 percent from September to October (from 1131 USD/MT in the first week to 981 USD/MT in the last week).

In Kenya, rice's wholesale and retail price increased by 14 percent and 22 percent from the last week of September to the first week of October before leveling off to the price prevailing in the first two weeks of September. Inflation in Kenya also increased. (Kenya National Bureau of Statistics, 2023).

In Rwanda, the price of Pakistan rice first decreased from the last week of September into October before it leveled off to the existing prices in the first weeks of September. The price of Pakistan rice was higher than that of Asian and Thailand varieties.

Figure 7: Prices of imported rice varieties in East African countries (October 2023)



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

Summary and Future Outlook

Trends in domestic and East African regional prices to a great extent are determined by the level of regional trade which are also influenced by such factors a non tariff barriers and geopolitical reasons. For example, Maize from Uganda to South Sudan was red-flagged for high aflatoxin levels by the South Sudan National Bureau of Standards after failing to pass the EAC agreed permissible limit for aflatoxin in the East African community economic bloc[11]. Non-tariff barriers such as import permits and certificates of conformity are a hindrance to regional trade, are responsible, and will continue to affect some observed price changes in cereals in some months. Other factors likely to affect the future outlook include;

- The depreciation of the national currencies across the East African countries could lead to rising prices of imported rice, across the markets in the subsequent months.

- Government intervention in the agricultural commodity markets through fertilizer subsidies will affect supply of the cereals. In Kenya for example, due to the subsidy program, maize production increased substantially. The Government has already launched a second fertilizer Subsidy program country wide in Kenya that will see the price of fertilizer reduce by 50 percent and increase its availability to farmers.

Lastly, Uganda should consider looking for ways to improve the quality of its maize to make it competitive in the neighboring country markets which could help cushion against its dropping domestic price.

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)[12] facilitated by the International Food Policy Research Institute, (2) Kenya Market Information System [13] sourced for the Ministry of Agriculture Livestock Fisheries and Co-operatives (MALF) for Kenya, and e-Soko (3)[14] for Rwanda. Also, we maintain that the data source for commodity prices for Rwanda neither indicates whether the prices are retail or wholesale. Further, the data for Kenya and Rwanda were collected in the local currencies, measured in Kshs/Kg and Rwf/Kg, and converted to USD/MT. Additionally, we averaged the weekly and daily wholesale and retail prices of maize and rice across the markets for each country in East Africa while drawing comparisons between January and February. We also analysed within-country weekly average wholesale prices of maize in selected markets of Uganda and Kenya. We also computed monthly average changes in rice wholesale and retail prices between January and February for the East African region to quantify any changes in the two periods. Finally, we constructed graphs of wholesale and retail prices of domestically produced and imported rice for Uganda and Rwanda.

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[11] https://www.thecitizen.co.tz/tanzania/news/east-africa-news/uganda-set-to-destroy-1-700-tonnes-of-maize-4408812

[12] 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 (food-securityportal.org)](food-securityportal.org)

[13] 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

[14] 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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