



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 have gone up in East Africa (Uganda, Kenya, Tanzania, Rwanda) due to a number of reasons. The increase in fuel costs, Rwanda's waived value-added tax on maize, a non-tariff embargo on maize exports in Tanzania, and South Sudan's ban on Ugandan maize due to high aflatoxin levels have all contributed to the increase.
- ▶ The weakening of local currencies against the US dollar has caused mixed price variations for imported rice varieties in Uganda, Kenya, and Rwanda. Additionally, the demand for imported rice has increased post-Covid-19, contributing to price volatility across East Africa.
- ▶ The projected El Nino rains from October-December 2023 in the Lake Victoria basin pose a threat to crop production and the disruption of transportation networks. Traders should anticipate production shortfalls and possible market trend impact.

Changing Maize Prices in East Africa

In August, maize prices were slightly stable, but in September, the weekly average wholesale and retail prices of maize across the East African region fluctuated significantly (Figure 1). For instance, in Kenya, wholesale prices averaged USD 412/MT in the first week, increased to USD 422/MT in the second week, then dropped to USD 397/MT in the third week, and further decreased to USD 387/MT in the fourth week. Meanwhile, retail prices averaged USD 518/MT in the first week, increased to USD 534/MT in the second week, dropped to USD 526/MT in the third week, and further decreased to USD 487/MT in the fourth week. This instability in maize prices observed in Kenya may be due to the acute scarcity of maize in some regions while others have had increased output from the harvest (Anyanzwa, 2023; Bii and Mwangi, 2023). Additionally, high fuel prices, after unwinding fuel subsidies and increasing VAT

on fuel from 8% to 16% (Okafor, 2023), are driving up transportation costs, which could be contributing to price instability. Fuel prices are said to have hit a record high of 200 KES/Ltr between August and September for the first time in the country's history¹

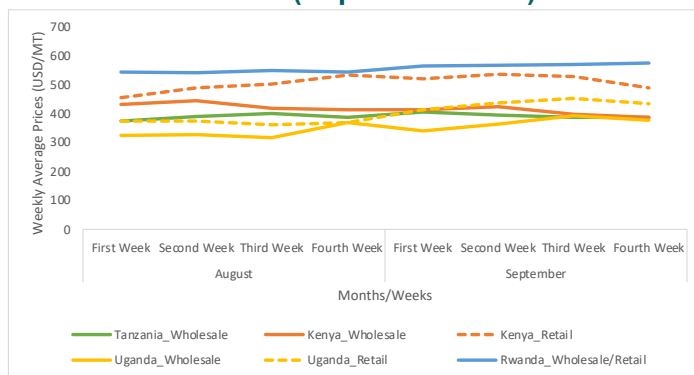
In Uganda, wholesale maize prices averaged USD 340/MT in the first week, increased to USD 362/MT in the second week, further to USD 392/MT in the third week, and then dropped in the fourth week to USD 377/MT. Similarly, weekly retail prices averaged USD 412/MT in the first week, increased to USD 435/MT in the second week, further to USD 451/MT in the third week, and then dropped in the fourth week to USD 433/MT. This is due to the continued ban on maize from Uganda to South Sudan because of high aflatoxin levels in Ugandan maize impounded at South Sudan Borders since May (Esiara, 2023). Moreover, the easing of prices of food crops due to the harvest season in July has also contributed to the price drops.

¹ <https://reliefweb.int/report/burundi/eastern-africa-market-and-trade-update-2023-quarter-3-october-2023>

In Tanzania, the weekly wholesale prices of maize averaged USD 406/MT in the first week, dropped to USD 394/MT in the second week, and stabilized at USD 387/MT in the third and fourth weeks, respectively. This was attributed to non-trade barriers on maize from Tanzania to Kenya and Uganda (Anami and Tairo, 2023). This partially explains the stagnation of headline inflation at 3.3% in September, as it was in August (National Bureau of Statistics of Tanzania, 2023). Tanzania is also experiencing increasing fuel prices which makes the transportation of produce from farms in remote areas to the urban areas costly².

However, in Rwanda, the weekly prices of maize exhibited an upward trend throughout September. They averaged USD 564/MT in the first week, USD 566/MT in the second week, USD 568/MT in the third week, and then USD 574/MT in the fourth week. This increase vindicates the 13.9% increase in urban inflation in September, largely driven by the increase in food crop items and transportation costs (National Institute of Statistics of Rwanda, 2023).

Figure 1: Average wholesale and retail price of maize in East Africa (September 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).

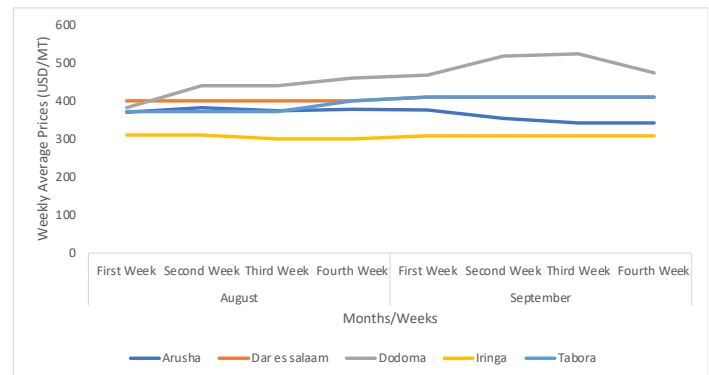
Tanzania

In comparison to August, the Dodoma market recorded the highest weekly wholesale prices of maize, followed by Dar es Salaam and Tabora markets then the Arusha market and the least wholesale prices were recorded in Iringa, in September (Figure 2). Illustratively, in September, in the Dodoma market, the weekly wholesale prices of maize averaged USD.467/MT in the first week, then rose to USD.517/MT in the second week and rose further to USD.523/MT in the third week, then fell to USD.474/MT in the fourth week. In the Dar es Salaam market, weekly

wholesale prices of maize averaged USD.410/MT throughout the month. Likewise, in Tabora, the weekly wholesale prices of maize averaged USD.410/MT throughout the month. In the Arusha market, the weekly wholesale prices of maize took a downward trend. For instance, they averaged USD.374/MT in the first week, USD.353/MT in the second week, and USD.342/MT in the third and fourth weeks, respectively.

Meanwhile, in the Iringa market, the weekly wholesale prices of maize averaged USD308/MT throughout the month. The general stability observed in other markets except Dodoma was attributed to the effectiveness of the non-trade embargo policy imposed on maize from Tanzania to other East African countries (Anami and Tairo, 2023). Further, it is attributed to the good harvest regions in the 2022/23 crop season (Bank of Tanzania, 2023). However, the surge of wholesale prices of maize in the Dodoma market remained elevated primarily due to heightened demand for food in some regions, particularly those bordering neighbouring countries (Bank of Tanzania, 2023).

Figure 2: Average weekly wholesale prices of maize in selected markets in Tanzania (September 2023)



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

Kenya

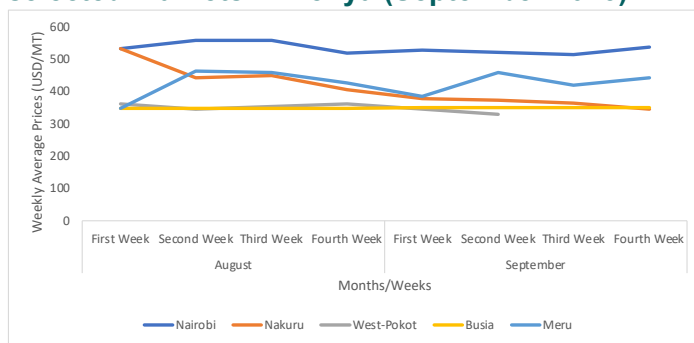
Like in August, the weekly average wholesale prices of maize in all the selected markets in Kenya in September showed mixed patterns. Further, the Nairobi market recorded the highest wholesale prices of maize, followed by the Meru market, and then Nakuru, Busia, and West-Pokot recorded the lowest wholesale prices, respectively (Figure 3). For instance, in the Nairobi market, the weekly wholesale prices of maize averaged USD.521/MT in the first week, then dropped to USD.521/MT in the second week and

² <https://www.thecitizen.co.tz/tanzania/news/national/threats-linger-despite-tanzania-having-4-million-tonnes-of-food-surplus-4391214>

dropped further to USD.512/MT in the third week, then rebounded in the fourth week to USD.536/MT. This is due to the increased living costs due to high fuel prices after the relaxation of fuel subsidies and the removal of VAT on gasoline (Okafor, 2023). In Part, the increased purchasing power amongst Nairobi dwellers during the pandemic led to increased demand, hence the high prices. In the Nakuru market, however, the weekly wholesale prices of maize in September took a downward trend compared to August. They averaged USD.376/MT in the first week, then dropped to USD.374/MT in the second week, dropped further to USD.363/MT in the third week, and USD.344/MT in the fourth week. This could be due to the increased output from the harvest in that region (Bii and Mwangi, 2023).

Similarly, in the West-Pokot market, the weekly average wholesale prices of maize took a descending trajectory. This could result from the increased output in that area from the harvest season (Bii and Mwangi, 2023). Nevertheless, wholesale prices of maize in the Meru market surged further in September compared to August. They averaged USD.385/MT in the first week, then rose to USD.459/MT in the second week, USD.420/MT in the third week, and USD.441/MT in the fourth week. This could be attributed to the poor harvest that was experienced in that area due to the drought conditions (Anyanzwa, 2023). However, in the Busia market, the weekly average wholesale prices of maize remained unchanged and stable at USD.350/MT throughout September. This emanates from the cross-border trade as many Kenyan traders cross over to Uganda to buy maize grains in bulk from farmers.

Figure 3: Average weekly retail prices of maize in selected markets in Kenya (September 2023)



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

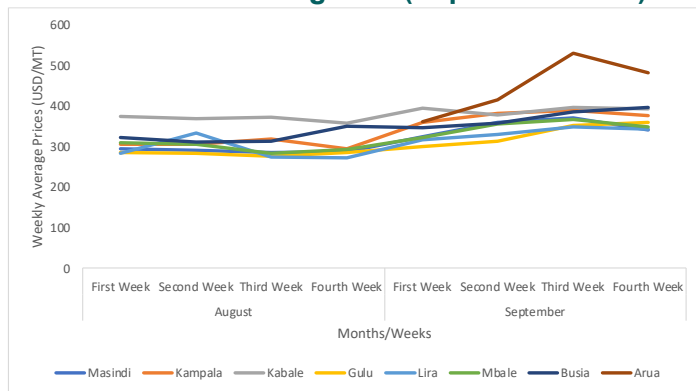
Uganda

In comparison to August, the weekly average wholesale prices of maize in all the selected markets in Uganda surged in September. Furthermore, the Kabale market recorded the highest weekly average wholesale prices of maize, followed

by the Arua market, then Kampala, Busia, Mbale, and Masindi markets, respectively. In contrast, the Gulu and Lira markets recorded the lowest wholesale prices (Figure 4). To illustrate this, in the Kabale market, the weekly wholesale prices averaged USD.394/MT in the first week, USD.377/MT in the second week, USD.396/MT in the third week and USD.374/MT in the fourth week. In the Arua market, the weekly wholesale prices of maize averaged USD.360/MT in the first week, USD.414/MT in the second week, USD.529/MT in the third week, then USD.480/MT in the fourth week. In the Kampala market, the weekly wholesale prices of maize averaged USD.358/MT in the first week, USD.381/MT in the second week, USD.389/MT in the third week, then USD.374/MT in the fourth week. The weekly wholesale prices of maize in the Busia market had an upward trend; they averaged USD.346/MT in the first week, USD.357/MT in the second week, USD.385/MT in the third week, and USD.396/MT in the fourth week. The weekly wholesale prices of maize in Mbale averaged USD.321/MT in the first week, USD.355/MT in the second week, USD.365/MT in the third week, and USD.348/MT in the fourth week. In the Masindi market, the weekly wholesale prices of maize averaged USD.323/MT in the first week, USD.359/MT in the second week, USD.369/MT in the third week, and USD.341/MT in the fourth week. There was an upward trend in the weekly wholesale prices of maize recorded in the Gulu market. They averaged USD.300/MT in the first week, USD.312/MT in the second week, USD.352/MT in the third week, and USD.358/MT in the fourth week. Meanwhile, in the Lira market, the weekly wholesale prices of maize averaged USD.315/MT in the first week, USD.328/MT in the second week, USD.347/MT in the third week, and USD.342/MT in the fourth week.

To elaborate on the points discussed earlier, the highest wholesale prices for maize have been recorded in Kabale and Arua. These high prices are mainly due to increased transportation costs resulting from high fuel prices. Furthermore, these areas depend on maize from Kampala and other regions like Masindi, which are located far away. The poor condition of the roads means that the maize takes a long time to reach these markets. For instance, the road from Kampala to Arua is in bad shape and is still under construction in some parts. Despite the harvest season in July, wholesale prices in Busia, Mbale, and Masindi markets were higher than in Gulu and Lira markets. This is because Kenyan traders buy maize in bulk directly from farmers in these areas, increasing the demand and increasing prices. In addition, due to high aflatoxin levels in maize grains, the ongoing trade impasse between South Sudan and Uganda (Esiara, 2023), has adversely affected wholesale prices in Gulu and Lira. These areas are geographically close to South Sudan, which means that the trade restrictions have significantly impacted them.

Figure 4: Average weekly retail prices of maize in selected markets in Uganda (September 2023)



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

Comparison of wholesale and retail maize prices in East Africa

Generally, the monthly average wholesale and retail prices of maize across the East African countries increased in September compared to August, except for wholesale prices in Kenya, which decreased (Table 1). Illustratively, Kenya's retail and wholesale prices increased (decreased) by 4.5% and 5.2%, respectively. The surge in retail prices alludes to the rise in Kenya's inflation rate by 0.1%, from 6.7% in August to 6.8 in September (Kenya National Bureau of Statistics, 2023). However, the wholesale prices could have fallen due to increased output from the harvest season in some maize-producing regions (Bii and Mwangi, 2023). The retail and wholesale prices in Uganda increased by 17.3% and 10.2% respectively. This could be attributed to an increase in headline inflation in September by 0.7% compared to 0.6% in August, mainly driven by food crops like maize grains (Uganda Bureau of Statistics, 2023).

Meanwhile, in Tanzania, the wholesale price of maize increased by 1.4%. This is in tandem with the increase in the overall monthly consumer price index attributed to price increases of some food items. For example, maize increased by 2.3% (National Bureau of Statistics of Tanzania, 2023). In Rwanda, the prices surged by 4.4%. This is also in tandem with the increase in Urban inflation to 3.6% in September from August (National Institute of Statistics of Rwanda, 2023).

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

Commodity	Country	Market Levels	Monthly Average Prices August	Monthly Average Prices September	% Change	Trends
Maize	Kenya	Retail	494	516	4.5	▲
Maize	Uganda	Retail	369	433	17.3	▲
Maize	Rwanda	Retail	544	568	4.4	▲
Maize	Kenya	Wholesale	427	405	-5.2	▼
Maize	Uganda	Wholesale	334	368	10.2	▲
Maize	Rwanda	Wholesale	544	568	4.4	▲
Maize	Tanzania	Wholesale	388	393	1.4	▲

▼ = 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)

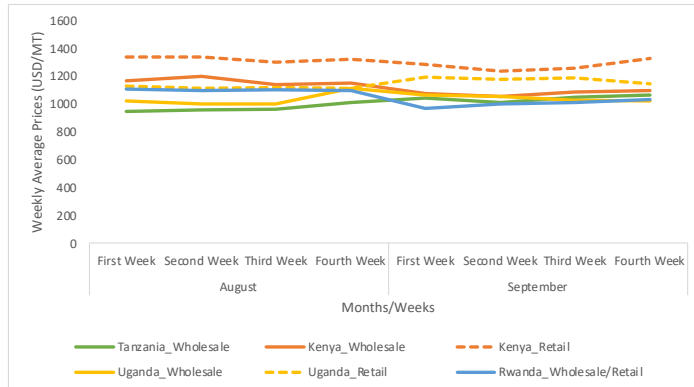
Changing Rice Prices in East Africa

In August, the subtle weekly average prices of rice were experienced, but in September, the weekly average wholesale and retail prices of rice across East African countries were volatile. Figure 5 portrays the situation. For instance, in Kenya, weekly wholesale and retail prices for rice increased steadily. The wholesale price of rice averaged USD.1078/MT in the first week, then rose to USD.1054 /MT in the second week, then to USD.1090/MT in the third week, and to USD.1100/MT in the fourth week. Concurrently, the retail prices averaged USD.1284/MT in the first week, then rose to USD.1257/MT in the second week, then to USD.1257/MT in the third week, and further to USD.1327/MT in the fourth week. This indicates the high cost of living faced by households. The cost of living and household pressure from rising food costs persist due to the implementation of the recently passed value-added tax policy on fuel, increasing it from 8% to 16% (Okafor, 2023).

On the other hand, Uganda experienced a drop in the weekly wholesale price of rice. In the first week, it was USD.1067/MT, then fell to USD.1055/MT in the second week, then dropped further to USD.130/MT in the third week and rebounded to USD.10412/MT in the fourth week. The retail prices averaged USD.1195/MT in the first week, then dropped to USD.1181/MT in the second week and rebounded to USD.1188/MT in the third week but dropped again to USD.1148/MT in the fourth week. This could be attributed to the high fuel prices that pushed retail prices and the bumper harvest always experienced in July in Uganda that pushed down prices. In Rwanda, the weekly average prices of rice showed an upward trend. They averaged USD.970/MT in the first week, then rose to USD.1000/MT in the second week, to USD.1011/MT in the third week, and to USD.1036/MT in the fourth week. This alludes to the rise in urban inflation in September by 3.6%, driven by food crop

items (National Institute of Statistics of Rwanda, 2023). During the first week, the average price of rice in Tanzania was USD 1043/MT, which decreased to USD 1013/MT in the second week, went back up to USD 1048/MT in the third week, and then rose significantly to USD 1067/MT in the fourth week. Bank of Tanzania (2023) argued that while prices of food crops were easing, prices of certain markets remained elevated due to increased demand from the neighbouring border countries.

Figure 5: Average daily wholesale and retail prices of imported rice in East Africa (September 2023)



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

Unlike the maize prices, generally, the monthly average retail and wholesale price of rice in the East African region plunged in September except for some cases (Table 2). To demonstrate this, retail and wholesale prices in Kenya decreased by 3.8% and 7.2% respectively. This could be attributed to the copying mechanism of urban dwellers changing their consumption patterns from expensive rice to maize, hence dampening the proportion of monthly average rice prices. In Uganda, retail increased by 5.1% and wholesale prices decreased by 21.1%. There are two vital factors at play here. First, the surge in fuel prices influences retail prices, and second, the harvest season in July roves down the wholesale prices. In Tanzania, the monthly average wholesale price surged by 7.4%. This alludes to the overall consumer price index driven by the increase in the price of some food items like rice (National Bureau of Statistics of Tanzania, 2023). In Rwanda, the monthly average price of rice decreased by 9.0%.

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

Commodity	Country	Market Levels	Monthly Average Prices August	Monthly Average Prices September	% Change	Trends
Rice	Kenya	Retail	1327	1277	-3.8	▼
Rice	Uganda	Retail	1121	1178	5.1	▲
Rice	Rwanda	Retail	1104	1004	-9.0	▼
Rice	Kenya	Wholesale	1164	1081	-7.2	▼
Rice	Uganda	Wholesale	1037	818	-21.1	▼
Rice	Rwanda	Wholesale	1104	1004	-9.0	▼
Rice	Tanzania	Wholesale	971	1043	7.4	▲
			▼ = 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

Table, 3 shows the weekly average prices of the different varieties of rice imported into the selected East African countries. We observe mixed patterns of up-and-down swings in the wholesale and retail prices of the imported rice varieties in East Africa. In Uganda, the retail and wholesale prices of rice imported from Tanzania were higher than those of rice imported from the Pakistani variety. In Rwanda, rice imported from Tanzania (Tanzania No.1) recorded the highest prices compared to rice (Tanzania No.2), Asia and Thailand varieties. This was followed by rice (Tanzania No.2) then Asia and Thailand varieties posed mixed trends. In Kenya, the wholesale prices of Pakistani rice were the lowest in East Africa while the retail prices were within range albeit the lowest in the region. Therefore, the volatility of imported rice varieties is largely attributed to two factors. (i) Weakening local currencies against the US dollar as the US Fed continues to tighten the monetary policy to ease further inflationary pressures. (ii) Increased demand and preference for certain varieties by households. For example, rice imported from Tanzania is highly preferred and demanded by households and firms than other rice varieties. In Uganda, the average monthly exchange rate of USD to Shilling increased from UGX 3689 to UGX 3738, in Kenya, it increased from Kshs/US\$ 144 to 147 while for Tanzania, it increased from Tzs/USD 2453 to 2497. Many of the East African countries had their currencies continue to lose their value against the U.S.dollar (USD).

Table 3: Trends of weekly average wholesale and retail prices of imported rice in East Africa (September 2023)

Variety	Country	Market Level	August				September		
			First Week	Second Week	Third Week	Fourth Week	First Week	Second Week	Third Week
Pakistan	Uganda	Wholesale	988	978	1026	1007	1131	1111	1159
Pakistan	Uganda	Retail	1086	1080	1138	1128	1252	1263	1292
Pakistan	Kenya	Wholesale	911	917	911	857	932	935	990
Pakistan	Kenya	Retail	1065	1105	1142	1120	1103	1129	1107
Pakistan	Rwanda	Wholesale/Retail	1087	1089	1089	1090	1167	1172	1191
Tanzania	Uganda	Wholesale	1114	1095	1064	1071	1188	1215	1194
Tanzania	Uganda	Retail	1209	1202	1194	1212	1339	1347	1342
Tanzania No. 1	Rwanda	Wholesale/Retail	1439	1428	1434	1420	1479	1491	1486
Tanzania No. 2	Rwanda	Wholesale/Retail	1144	1135	1125	1127	1180	1188	1364
Thailand	Rwanda	Wholesale/Retail	1152	1147	1157	1180	1255	1328	1271
Asia	Rwanda	Wholesale/Retail	1053	1040	1062	1048	1109	1136	1175

Summary and Future Outlook

The prices of maize in selected East African countries (including Uganda, Kenya, Tanzania, and Rwanda) have increased for various reasons. Uganda is currently experiencing its perennial harvest season in July, while Rwanda has waived value-added tax on maize to help poor households. In Tanzania, a non-trade embargo on maize has created a surge in domestic supply, and South Sudan has banned the import of Ugandan maize due to high aflatoxin levels.

With regards to rice, prices in the selected East African countries (Uganda, Kenya, and Tanzania) have shown mixed patterns in terms of monthly average percentage changes. These variations are in line with the reported decrease (or increase) in inflation in Kenya, Uganda, Tanzania, and Rwanda. The mixed variation of wholesale and retail prices of imported rice varieties, including Pakistani, Tanzania No.1&2, Tanzania, Thailand, and Asia in Uganda, Kenya, and Rwanda respectively, can be attributed to the weakening of local currencies against the US dollar, caused by a hawkish US Fed policy. Additionally, the rise in demand during the post-Covid-19 pandemic era played a significant role in influencing the price volatility of imported rice varieties across the East African region.

According to the Metrological Authorities in East African countries, El Nino rains are expected to hit the Lake Victoria basin from October to December 2023, with heavy and recurrent downpours. This climatic condition poses a severe threat to maize production and harvesting, while it is convenient for rice production. The potential impact of El Nino on the next production cycle is significant for market trends, and traders are looking ahead to potential production shortfalls. Despite the expected decline in maize prices across most markets between October 2023 and March 2024 due to increased supply from average to above-average October to December harvest in East African production areas, the situation still calls for caution.

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)³ facilitated by the International Food Policy Research Institute, (2) Kenya Market Information System⁴ sourced for the Ministry of Agriculture Livestock Fisheries and Co-operatives (MALF) for Kenya, and e-Soko (3)⁵ 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.

³ 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 \(foodsecurityportal.org\)](http://ckan(foodsecurityportal.org))

⁴ 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

⁵e-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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About the authors

Annet Adong: Center for Development Research, University of Bonn Germany

Ronald Ochen and Jolly Achola: Makerere University, Kampala Uganda

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1201 Eye Street, NW, Washington, DC 20005 USA | T. +1-202-862-5600 | F. +1-202-862-5606 | Email: ifpri@cgiar.org | www.ifpri.org | www.ifpri.info

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