



The Food Price Monitor: Kenya is a monthly report developed for the Food Security Portal (FSP), facilitated by IFPRI, with the goal of providing clear and accurate information on commodity price trends and variations in selected markets throughout Kenya. The reports are intended as a resource for those interested in agricultural commodity markets in Kenya, namely producers, traders, consumers, or other agricultural stakeholders.

Highlights

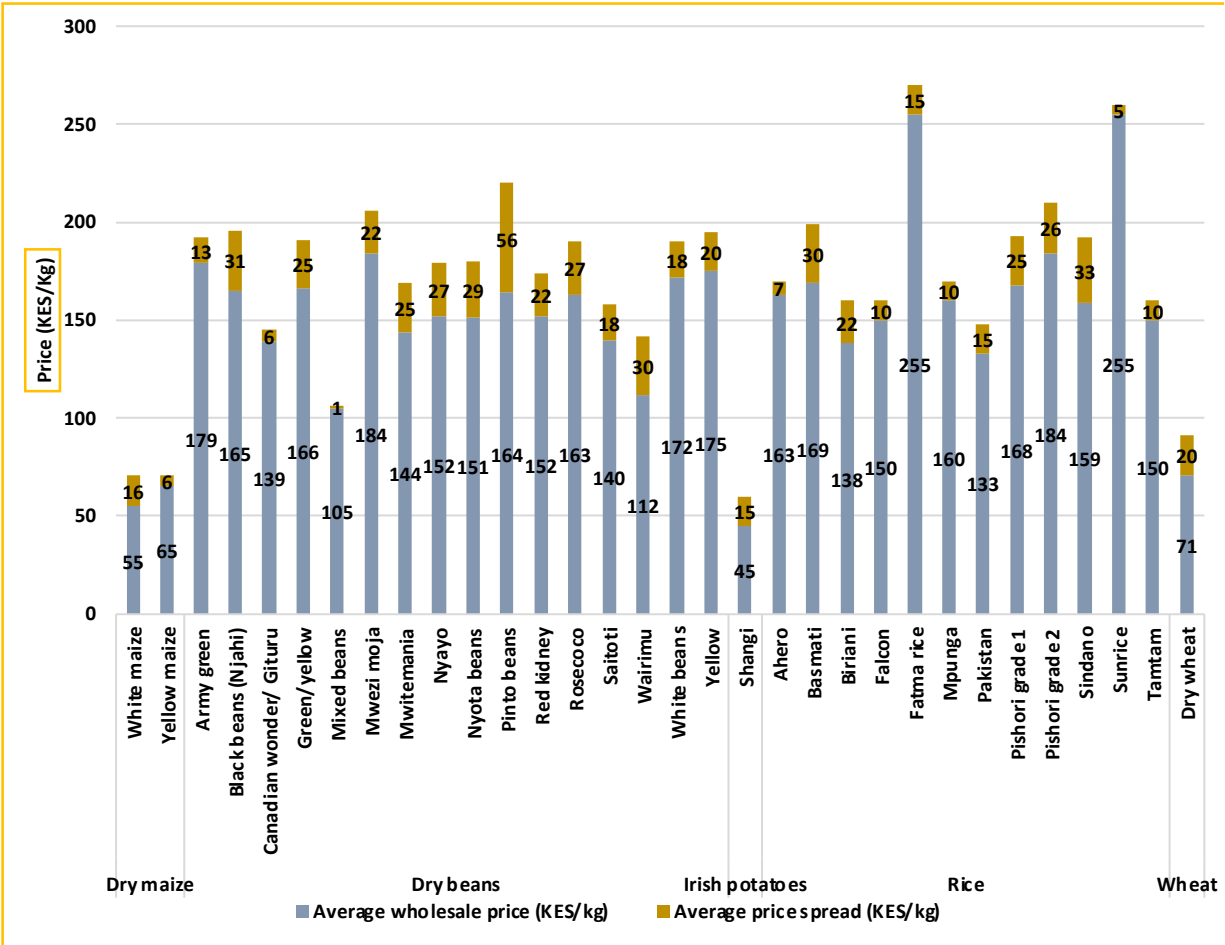
- ▶ Differences in pricing margins between wholesale and retail can be traced back to heightened local demand and increased transportation costs, especially during the festive season in December.
- ▶ Even though the grain-producing regions of the country have witnessed a plentiful harvest, the unexpectedly higher prices in these areas may be ascribed to heightened demand, increased fuel costs, and the engagement of various intermediaries.
- ▶ The increase in rice demand in densely populated cities, reliance on imports influenced by escalated import costs due to the depreciation of the Kenyan shilling against the dollar, and the upward trend in fuel prices affecting transportation expenses all collectively contribute to the elevated rice prices.
- ▶ The fluctuations in commodity prices can be ascribed to the dynamic interaction between demand and supply forces, intensified by the heightened demand during the festive season in December.

Overall Wholesale and Retail Prices for December

Figure 1 displays the overall wholesale and retail prices for maize, beans, potatoes, rice, and wheat in the main Kenyan markets throughout the month of December. Some commodities, such as Yellow maize (95), several bean varieties [Army green (7%), Canadian wonder (4%), mixed beans (1%), Mwezi moja (12%), Red kidney (14%), Saitoti (13%), white beans (10%), and yellow beans (11%)], and multiple rice varieties [Ahero (4%), Falcon (7%), Fatme and Mpunga (6% each), Pakistan (11%), Pishori grade 2 (14%), Sunrice (2%), and Tamtam (7%)], showed decreased price differentials, ranging from 2% to 14%. Certain commodities displayed price differentials ranging from 15% to 25%. This group comprises specific dry beans like Black beans-Njahi (19%), Green yellow (15%), Mwitmania (17%), Nyayo (18%), Nyota (19%), and Rosecoco (17%). Additionally, it

includes various rice varieties, such as Basmati (18%), Biriani (16%), Pishori grade 1 (15%), and Sindano (21%). A few specific commodities, particularly white maize (29%), Pinto beans (34%), Wairimu (27%), Shangi Irish potatoes (33%), and wheat (28%), exhibited price differentials falling within the range of 26% to 35%. These variations in pricing margins between wholesale and retail can be attributed to increased local demand, transportation costs, associated with festivities in December. Despite the harvests from high and medium rainfall areas during the long rains, prices of staple foods remain high. This is attributed to factors like increased fuel costs, production expenses, marketing costs, and high local demand (Famine Early Warning Systems Network, 2023).

Figure 1: Overall average wholesale and retail prices (KES/Kg)



Source: Daily Market Survey for the month of December 2023

Wholesale and Retail Commodity Prices

Different regions featured a variety of dry beans, with consistent presence noted for Black beans (Njahi), Nyayo, Rosecoco, and Wairimu beans across all selected regions (Table 1). Specific dry bean varieties were region-exclusive; for instance, Canadian wonder and Mixed beans were found only in the Nakuru region, Mwezi Moja and Nyota beans were exclusive to Eldoret, white beans were specific to Nairobi, and Pinto and Red Kidney beans were exclusive to Kisumu. The Eldoret and Nakuru areas had the most diverse array of bean types, while Nyeri and Kisumu regions recorded fewer varieties. As anticipated, retail prices for all bean varieties exceeded their wholesale prices. In comparison to the average wholesale price of 163 KES/kg, Rosecoco registered elevated wholesale prices in Eldoret (169 KES/kg), Mombasa (170 KES/kg), and Nairobi (165 KES/kg). In the Eldoret region, most bean varieties exhibited higher wholesale and retail prices compared to other regions, driven by increased demand. In Nakuru, all

bean varieties experienced lower retail and wholesale prices than the national average, attributed to the availability of the commodity during the harvesting season which began in September, with Nakuru being a major producing region.

In Kisumu, Mombasa, and Nairobi, white dry maize exhibited higher wholesale and retail prices compared to the national average of 55 KES/kg and 71 KES/kg, respectively. The three regions reported wholesale prices of 56 KES/kg, 75 KES/kg, and 57 KES/kg, along with retail prices of 75 KES/kg and 80 KES/kg in Mombasa and Nairobi. For yellow maize, Nairobi and Nakuru recorded higher wholesale prices of 65 KES/kg and 75 KES/kg and retail prices of 90 KES/kg and 78 KES/kg, respectively, compared to the national wholesale and retail prices of 65 KES/kg and 71 KES/kg. Despite the country's grain-producing regions experiencing a bountiful harvest, the unexpectedly higher prices in these mentioned regions could be attributed to increased demand, elevated fuel costs, and the involvement of various intermediaries.

In the Nairobi region, Irish potatoes were sold at 84 KES/kg and 95 KES/kg, respectively, compared to the national wholesale and retail prices of 60 KES/kg and 45 KES/kg. The price escalations in this densely populated city are a consequence of heightened demand, increased transportation costs due to rising fuel prices, and the engagement of multiple intermediaries.

Pishori and Biriani rice were widespread across all regions, with additional varieties such as Tamtam, Fatma, Sunrice, and Mpunga in Mombasa, Ahero and Pakistan rice in Kisumu, and Falcon rice in Eldoret. Basmati rice (non-aromatic) was available in all regions except Mombasa, and Sindano rice was accessible everywhere except Nairobi. Wholesale prices for Pishori grade 1 rice varieties increased in all regions except Kisumu and Nakuru. The surge in

demand for rice in densely populated cities, dependence on imports impacted by increased import costs due to the depreciation of the Kenyan shilling against the dollar, and rising fuel prices affecting transportation costs all contribute to the heightened rice prices.

Eldoret and Nakuru recorded both wholesale and retail prices for dry wheat surpassing the national average of 71 KES/kg and 91 KES/kg, reporting rates of 80 KES/kg and 83 KES/kg for wholesale, and 100 KES/kg and 106 KES/kg for retail, respectively. The predominant factor contributing to the elevated wheat prices in these regions is market dynamics marked by a supply deficit relative to demand, primarily due to seasonality.

Table 1: Average wholesale and retail prices (kes/kg) by region for December

Product	Variety	Average w/sale price (KES/kg)						Average retail price (KES/kg)						Total average w/sale price (KES/kg)	Total average retail price (KES/kg)
		Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri		
Dry beans	Army green	200		180		158		222		185		170		179	192
	Black beans (Njahi)	192	158	160	148	160	174	214	221	170	180	164	225	165	196
	Gituru beans					139						145		139	145
	Green/yellow	200	173	165	163	153	139	222	236	170	181	160	177	166	191
	Mixed beans					105						106		105	106
	Mwezi moja	184						206						184	206
	Mwitmania	174		140	150	136	123	196		150	180	145	175	144	169
	Nyayo	178	143	165	148	139	139	190	218	170	170	150	175	152	179
	Nyota beans	151						180						151	180
	Pinto beans		162						221					162	221
	Red kidney		152						221			130		152	174
	Rosecoco	169	160	170	165	161	156	181	220	180	190	170	200	163	190
	Saitoti	161		125	156	120		181		150	180	122		140	158
Wairimu	100	148	135	100	89	99	125	202	140	130	90	167	112	142	
White beans				172						190			172	190	
Yellow	175						195						175	195	
Dry maize	White maize	53	56	75	57	46	45	62	71	75	80	64	74	55	71
	Yellow maize		53		67	75			61		90	78		65	71
Irish potatoes	Shangi	42	38	36	84	36	32	44	60	60	95	60	38	45	60
Rice	Ahero		163						170					163	170
	Basmati	210	170		140	164	161	224	251		160	175	186	169	199
	Biriani	190	143	110	101	116	164	216	168	120	120	150	189	138	160
	Falcon	150						160						150	160
	Fatma rice			255						270				255	270
	Mpunga			160						170				160	170
	Pakistan		147				120		151				145	133	148
	Pishori grade 1	200		175	180	148	158	222		180	200	182	193	168	193
	Pishori grade 2	200	168					220	200					184	210
	Sindano	190	163	145		148	157	200	254	150		183	180	159	192
	Sunrice			255						260				255	260
Tamtam			150						160				150	160	
Wheat	Dry wheat	80	68	60	65	83	67	100	85	75	90	90	106	71	91

Source: Daily Market Survey for the month of December 2023

Wholesale and Retail Price Trends by Region

Price dynamics during weeks 1 to 3 exhibited regional variations. Eldoret observed a mix of stable, decreasing, and increasing prices, with most food commodities maintaining wholesale price stability and witnessing an increase in retail prices. Most dry bean varieties maintained steady wholesale prices from week 1 to week 3, while retail prices experienced increases ranging from 1% to 10%. White dry maize and Shangi Irish potatoes saw a 10% and 12% increase in wholesale prices, respectively, along with a 4% and 12% increase in retail prices, respectively. Conversely, most rice varieties and wheat maintained consistent wholesale and retail prices when comparing week 1 to week 3. These price fluctuations can be attributed to the seasonal availability of food items in the region and neighboring counties, leading to a gradual decline in prices. Additionally, heightened demand during December festivities contributed to higher prices for some commodities.

In Kisumu, a comparison between the third week and the first week of December revealed a mix of stable, decreasing, and increasing prices. Most food commodities exhibited stable prices and decreasing retail prices. All available dry beans experienced a reduction in retail prices ranging from 2% to 7%, except for Wairimu beans, which recorded a slight increase of 1%. White dry maize, yellow dry maize, and dry wheat saw reductions in retail prices by 4%, 3%, and 1%, respectively. Shangi Irish potatoes experienced a slight increase in retail prices, while most available rice varieties saw increasing retail prices ranging from 1% to 19%. The reduction in prices for most food commodities can be attributed to the availability of food resulting from the harvest and favorable climate for food production. The rise in retail prices can be attributed to heightened demand during the festive season, increased fuel costs resulting in higher transportation expenses, and the involvement of middlemen.

In Mombasa, a comparison of wholesale and retail prices between the third week and the first week revealed that all available commodities maintained stable prices. However, Irish potatoes experienced a notable increase in wholesale prices by 27%, likely attributed to their scarcity due to heightened demand during the festive season. Furthermore, the increased transportation costs resulting from rising fuel prices and the involvement of intermediaries may have contributed to the price hike. The stability of prices in Mombasa is influenced, in part, by the availability

FOCUS ON RICE ACROSS SELECTED REGIONS

Rice currently holds the position of the third most important staple crop in Kenya, following maize and wheat. It serves as a viable alternative cereal to complement maize, particularly favored by households in Arid and Semi-Arid Lands (ASAL) regions. Approximately 80% of the rice produced in Kenya is cultivated in irrigated ecologies established by the government and communities, with the remaining 20% grown under rain-fed conditions. The primary cultivation area for rice is the Mwea Irrigation Scheme in Kirinyaga County, and it is also grown in various regions across the country, including Ahero in Kisumu County and Bunyala in Busia County. Due to its adaptability to diverse production ecologies, rice is cultivated in numerous counties, encompassing Kirinyaga, Kisumu, Homa Bay, Migori, Meru, Embu, Tharaka Nithi, Isiolo, Marsabit, Busia, Kakamega, Bungoma, Turkana, Garissa, Elgeyo Marakwet, West Pokot, Baringo, Taita Taveta, Kilifi, Kwale, Tana River, Lamu, Siaya, and Murang'a.

In the primary production hub of Mwea, the main harvesting period occurs in November, while the ratoon harvest is typically in August. More than 100% of Kenya's rice is cultivated using irrigation systems, and it takes approximately three to four months for the crop to reach full maturity. The varieties of Kenyan rice include long-grain Sindano rice, medium-grain rice, and aromatic basmati rice, with Pishori being the most premium and commonly grown brand in the Mwea irrigation scheme and its extension areas. Rice farming plays a crucial role in Kenya, contributing significantly to food security and serving as a source of income for numerous smallholder farmers.

Various types of rice, such as Pishori, Basmati, and Sindano, are traded across different regions. The predominant sources of traded rice include the Mwea irrigation scheme (Pishori grade 2 and Basmati), Tanzania (Pishori grade 1, Mpunga, and Sindano), Pakistan (Basmati, Biriani, Sindano, and TamTam), and the Ahero irrigation system (Ahero).

In most areas in December, the average retail and wholesale price of Pishori rice was higher in most regions including Eldoret, Kisumu, Mombasa, and Nairobi. Basmati and Biriani rice saw higher wholesale and retail prices in Eldoret and Kisumu. The country's dependence on imports, which leads to high import costs, high transaction costs, and high demand, may be the cause of the high pricing of specific rice types in these cities.

Figure 1: Average wholesale and retail prices of rice (KES/kg) in selected regions

Variety	Average wholesale price (KES/kg)						Average retail price (KES/kg)						Total average wholesale price (KES/kg)	Total average retail price (KES/kg)
	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri	Eldoret	Kisumu	Mombasa	Nairobi	Nakuru	Nyeri		
Ahero	163						170						162	170
Basmati	210	179		140	164	161	224	231		160	172	168	168	199
Biriani	180	242	110	101	116	164	216	168	120	120	150	161	130	160
Calrose	150						160						150	160
Extra rice			200						216					216
Mpunga		160							170					160
Pakistan		147				120		151					143	148
Pishori grade 1	200		175	180	148	158	222		160	200	162	161	160	193
Pishori grade 2	200	162					160	200					160	193
Sindano	160	163	145		148	157	200	234	150		162	160	158	182
Sumica			255						260				250	260
Tanzania			166						160				150	160

Source: Daily Market Survey for the month of December 2023.

of produce from nearby regions known for their agricultural production.

In the Nairobi region, diverse price trends were observed, encompassing stability, reduction, and increase in wholesale prices for various commodities, while retail prices remained stable for the majority of food commodities. Retail prices for most available items experienced stability, with only black beans and Shangi Irish potatoes seeing slight increases of 2% and 1%, respectively. The stability and reduction in prices in the Nairobi region are influenced by the availability of commodities from neighboring producing regions.

In the Nakuru region, most commodities maintained stable wholesale and retail prices, with a few experiencing slight fluctuations in both categories. All available dry beans exhibited stable prices, except for Army green and black beans (Njahi), which saw a 4% and 13% increase in wholesale prices and a 13% and 18% increase in retail prices, respectively. Irish potatoes experienced a 5% increase in both wholesale and retail prices. White dry maize witnessed a reduction of 5% in both wholesale and retail prices, while wheat prices remained stable. The stability and reductions in prices, particularly for maize and wheat, can be attributed to seasonal factors, as Nakuru is one of the country's main producing regions.

When comparing wholesale and retail prices of various food commodities between weeks 1 and 3, the Nyeri region displayed a combination of stable, decreasing, and

increasing trends in both categories. For wholesale prices, most available dry beans experienced price increases, with Black beans, Green yellow, and Wairimu recording increases of 1.5%, 10%, and 1%, respectively. Maize had a 1% increase in wholesale price and a 4% increase in retail prices. Available rice varieties exhibited a mix of decreased, stable, and increased wholesale and retail prices. However, Shangi Irish potatoes witnessed a 5% increase in wholesale prices, whereas wheat recorded a 2% increase. Price fluctuations can be attributed to the interplay of demand and supply forces, heightened by increased demand during the festive season of December.

Comparison of National Average Prices between November and December

Examining the national averages for all commodities in November and December 2023 (Table 2), it is evident that wholesale and retail prices remained generally stable. Most commodities exhibited stability, with fluctuations ranging from 2% to -5%. A few experienced price decreases, falling greater than -5% but less than -17%, while some showed slight increases, ranging from greater than 4% to less than 10%, in both wholesale and retail prices. Given that November and December coincide with the festive season, overall, commodity prices did not undergo significant changes during this period.

Table 2: Comparison of November and December prices

Product	Variety	Average Wholesale Price (Kes/Kg)			Average Retail Price (Kes/ Kg)		
		November	December	Percentage change	November	December	Percentage change
Dry maize	White maize	57	55	-3%	72	71	-1%
	Yellow maize	70	65	-7%	81	71	-12%
Dry beans	Army green	181	179	-1%	193	192	-1%
	Black beans (Njahi)	163	165	1%	199	196	-2%
	Green/yellow	166	166	0%	193	191	-1%
	Mixed beans	105	105	0%	106	106	0%
	Mwezi moja	193	184	-5%	217	206	-5%
	Mwitmania	147	144	-2%	173	169	-2%
	Nyayo	154	152	-1%	181	179	-1%
	Nyota beans	158	151	-5%	188	180	-4%
	Pinto beans	149	164	10%	220	220	0%
	Red kidney	141	152	8%	171	174	2%
	Rosecoco	165	163	-1%	194	190	-2%
	Saitoti	143	140	-2%	162	158	-3%
	Wairimu	119	112	-6%	150	142	-6%
	White beans	172	172	0%	190	190	0%
	Yellow	195	175	-10%	223	195	-13%
Irish potatoes	Shangi	54	45	-17%	68	60	-12%
Rice	Ahero	158	163	3%	168	170	1%
	Basmati	172	169	-2%	201	199	-1%
	Biriani	137	138	1%	161	160	-1%
	Falcon	164	150	-9%	182	160	-12%
	Fatma rice	255	255	0%	270	270	0%
	Mpunga	160	160	0%	170	170	0%
	Pakistan	121	133	10%	157	148	-6%
	Pishori grade 1	174	168	-3%	196	193	-2%
	Pishori grade 2	184	184	0%	211	210	-1%
	Sindano	155	159	2%	191	192	1%
	Sunrice	255	255	0%	260	260	0%
Tamtam	150	150	0%	160	160	0%	
Wheat	Dry wheat	71	71	0%	90	91	1%
			Key				
			<4 but >-5	Stable			
			>5 but <-17	Decreasing			
			>4 but < 10	Increasing			

Source: Daily Market Survey for the month December 2023

Outlook for the Month of January 2024

Anticipated in the upcoming months is a potential increase in the prices of certain food commodities. This surge is likely linked to elevated transport and energy costs, stemming from the rise in fuel prices, along with increased import expenses attributed to the depreciation of the exchange rate. Nonetheless, a decline in prices is expected for specific essential food items, thanks to enhanced supply resulting from the ongoing rains. The projected changes are outlined for the month of January:

- Maize and beans prices are anticipated to decrease in January, attributed to the abundant harvests observed at the close of 2023.
- Rice and wheat prices expected to rise due to reduced production and increased import costs resulting from the depreciation of the KES.
- Irish potato prices predicted to increase due to scarcity, heightened demand, and the perishable nature of the commodity with a short shelf life.

FOCUS ON NAKURU REGION

Situated in the Rift Valley of Kenya, Nakuru serves as the administrative center for Nakuru County. It holds the position of the fourth-largest city in Kenya, trailing behind Nairobi, Mombasa, and Kisumu. Like other cities in the Rift Valley, Nakuru experiences a moderate climate throughout the year. The region witnesses two distinct rainy seasons: the long rains from March to May and the short rains from October to December.

Nakuru's economy revolves around three key sectors: manufacturing, agriculture, and tourism. The surrounding region is recognized for its significant agricultural potential, featuring a mix of small farms and large-scale agricultural enterprises. Coffee, wheat, barley, maize, beans, and potatoes stand out as the primary crops cultivated in the vicinity of Nakuru, contributing to both local consumption and sales.

Food commodities in the region are sourced directly from local farmers and neighboring counties. Irish potatoes are procured from Molo, Olkailau, Kinangop, and other parts of Nyandarua County. Dry maize come from local producers in Trans Nzoia, Uasin Gishu, and Nandi, and are also traded with neighboring counties, particularly Busia and Namanga borders. Beans were sourced from Kirinyaga, and Murang'a counties as well as Tanzania and Uganda, Rice is supplied from Mwea and neighboring Tanzania, while wheat is sourced from local farmers, Trans Nzoia, and Narok County.

Prices for these commodities are gathered from the wholesale and retail marketplaces in the Central Business District, known as Bargain and Wakulima, respectively. This market complements the Nakuru-Top market, catering to most of the surrounding sub-counties and counties in the area. Both the retail and wholesale markets offer a diverse range of agricultural goods. Operating every day of the week from 5 in the morning, the market experiences peak activity between 6 and 9 am on Mondays and Saturdays due to the arrival of new goods.

In December, numerous commodities maintained stable prices, while others experienced both increases and decreases. Wholesale prices for all dry beans, excluding Black (Njahi) and Army green, yellow maize, wheat, and certain rice varieties remained constant. White dry maize exhibited decreases in both wholesale and retail prices, while Irish potatoes witnessed an upswing in both wholesale and retail prices. The stability and decreases in prices can be attributed to the seasonal abundance of commodities, considering Nakuru's status as a major production region in the country. The rise in Irish potatoes' prices is linked to heightened demand during the festive season.

Table 3: Average Retail and Wholesale Prices, Nakuru Region

Product	Variety	Average retail price (KES/kg)			Total average wholesale price (KES/kg)	Total average retail price (KES/kg)
		Week 1	Week 2	Week 3		
Dry beans	Army green	180	173	180	180	177
	Black bean (Njahi)	190	188	175	180	184
	Cashew/white	180	180	180	183	180
	Maize/beans	185	188	188	185	185
	Mung bean	145	145	145	146	145
	Navya	150	150	150	150	150
	Red kidney	130	130	130	127	130
	Runner	170	170	170	161	170
	Soybean	122	122	122	120	122
	Waters	80	80	80	80	80
Dry maize	White maize	68	62	68	66	64
	Yellow maize	78	78	78	78	78
Irish potatoes	Orange	58	59	64	58	61
	White	114	115	115	114	115
Rice	Basmati	150	150	150	148	150
	Patoti grade 1	180	180	180	148	182
	Samba	180	180	180	148	180
Wheat	Soft	90	90	90	81	90
	Hard	90	90	90	81	90

Source: Daily Market Survey for the month of December 2023.

ABOUT THIS SERIES

The Food Security Portal (FSP), facilitated by the International Food Policy Research Institute (IFPRI), aims to improve food security for the world's poor and increase the resilience of global food systems against food and financial crisis. The project brings together international, regional, and country-level data, news, and research aimed at meeting countries' immediate food security needs and building long-term global food security. The FSP is designed to pool information in structured ways to ensure high-quality, timely, and relevant data and to provide the opportunity for collaboration among policymakers, development professionals, and researchers.

This report is part of the FSP's efforts to monitor country-level food prices in order to improve the governments' ability to respond to and prevent food crises. It presents monthly price trends and movements for key food commodities, including dry beans, dry maize, rice, wheat, and Irish potatoes, in selected major regions and markets in Kenya.

DATA COLLECTION AND METHODOLOGY

The study was conducted in the Mombasa, Nairobi, Nakuru, Eldoret, Kisumu, and Nyeri regions of Kenya. These regions comprise the key markets in major urban centers. The five selected commodities comprise the major staple foods in Kenya¹.

Data assistants, some of whom were traders, collected average daily wholesale and retail prices from the main markets of the selected regions. Data was collected daily for six days (Mondays to Saturdays) from stockists/wholesalers and traders in the morning hours.

During the last week of the month, the following qualitative data were captured:

- General observations on food prices during the month, including price variations and the lowest, highest, and prevailing wholesale and retail prices
- The source of food commodities and their availability throughout the month
- The effects of the COVID-19 pandemic, as well as government restrictions including curfews and cessation of movement, on food prices and availability (both supply and demand)
- Traders' adaptation strategies to the COVID-19 pandemic, including sourcing and selling

Additional secondary data was obtained from the Ministry of Agriculture, Kenya Government Food Security War Room (FSWR), Ministry of Agriculture Livestock and Fisheries (MoALF), and Regional Agriculture Trade Intelligence Network (RATIN).

¹ NB: While the report covers wheat, consumption of that commodity in Kenya is comprised mainly of wheat products (flours, pastries, and highly processed foods) rather than raw wheat itself.

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