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

▶ **Climate change**: The ongoing El Niño rains in various parts of the country have disrupted the transportation of food commodities to marketplaces.

▶ **Transport disruptions**: Delays in the movement of food commodities due to transport disruptions have increased the risk of spoilage.

▶ **Increased Fuel Prices:** Escalating fuel prices have led to higher transportation costs, consequently raising the prices food commodity.

▶ **Seasonality of Commodities**: At the start of the month, there was low production of potatoes, resulting in shortages and subsequently elevated prices.

▶ **Sudden price changes:** Varieties of beans and rice imported from neighboring countries, especially Uganda, Tanzania, and Ethiopia, led to abrupt price changes.

▶ **Poor Weather Conditions:** Open air market traders faced challenges due to adverse weather conditions, leading to perishability of food commodities. The lack of proper storage facilities, such as cold rooms contributed to reduced shelf life of commodities.
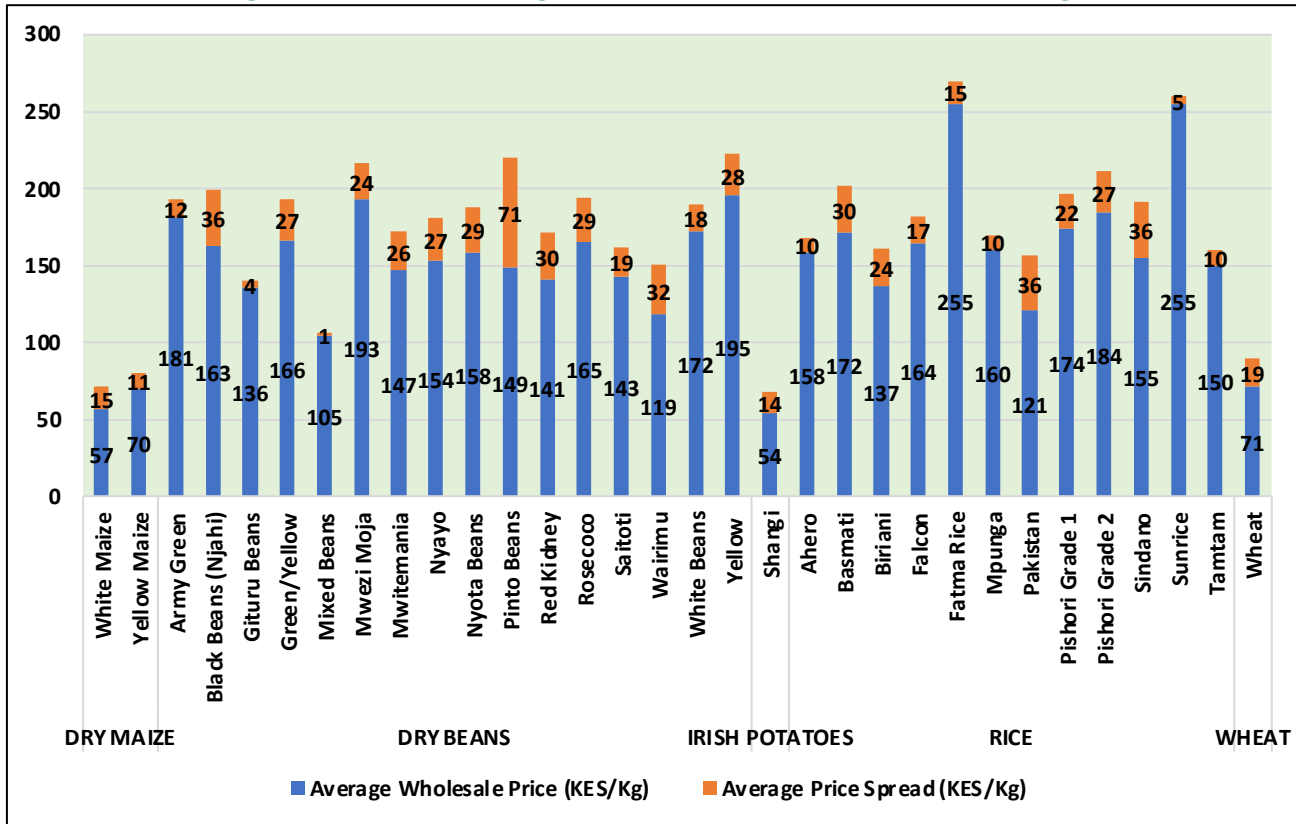
Overall Wholesale and Retail Prices for November

Figure 1 depicts the standard wholesale and retail prices for maize, beans, potatoes, rice, and wheat in the primary Kenyan marketplaces during the month of November 2023. Majority of the commodities exhibited low price margins ranging from 1% to 14%,: these included bean varieties such as : {Army green (7%), Gituru beans (3%), Mixed beans (1%), Mwezi moja (12%), White beans (10%), Yellow beans (14%) and Saitoti beans(14%)}, rice varieties including: Ahero (6%), Falcon (11%), Fatma (6%), Mpunga (6%), Pishori grade 1 (13%), Sunrice (2%) and Tamtam (7%). An almost similar number of commodities exhibited average price differentials ranging from 15% to 25%. They included: {Yellow maize (16%)}, bean varieties including: {Black beans/Njahi (22%), Green/Yellow beans (16%), Mwitemania (17%), Nyayo (18%), Nyota beans (18%), Red

kidney (21%) and Rosecoco (18%)}, rice varieties including: {Basmati (17%), Biriani (18%), Pishori grade 2 (15%) and Sindano (23%)} and Shangi Irish potatoes (25%). A few commodities recorded slightly high price differentials ranging from 26% to 35% including: White maize (27%), Wairimu beans (27%), Pakistan rice (30%) and Wheat (26%). Only one commodity; Pinto beans (48%); exhibited a slightly wider price differential above 36%.

The fluctuations in average wholesale and retail prices can be directly linked to the persistent El Niño rains. These weather conditions have led to deteriorated road networks, hindering the transportation of food commodities from producers/farmers to traders. Additionally, there has been a surge in fuel prices, coupled with high tax rates, further contributing to the observed price volatility.

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

Source: Daily Market Survey for the month of November 2023

Wholesale and Retail Commodity Prices

Several dry bean varieties were present across several regions but only Black beans (Njahi), Green/Yellow beans, Nyayo, Rosecoco and Wairimu bean varieties were common in all the six regions (Table 1). Except for Kisumu, Mwitemania beans were widespread for other regions. However, certain dry bean varieties were observed only in specific regions; for example, Gituru beans and Mixed beans were observed in Nyeri region, Nyota beans were present in Eldoret, Pinto beans were observed in Kisumu, white beans were present in Nairobi and Yellow beans were only present in Eldoret region. Most bean varieties were present in Eldoret, Nairobi, Mombasa and Nakuru Regions. The retail prices were higher than the wholesale prices for all the bean varieties across board. Like the previous month of October, Nakuru region recorded a decline in both the wholesale and retail prices. Nyeri region was also peculiar during the month of November after recording the lowest wholesale prices compared to the national average. Eldoret and Nakuru regions recorded the highest number of bean types during the month of November. The price volatility observed can be attributed to high transportation costs

emanating from the recent hike in fuel prices, the seasonality of various food commodities and supply chain factors. These factors include extended transportation time due to poor road networks caused by the ongoing El Nino rains.

Dry maize particularly white maize variety exhibited higher wholesale prices in Kisumu and Mombasa at 58 KES per Kg and 75 KES per Kg respectively compared to the national average price of 57 KES per Kg. On the other hand, Kisumu, Mombasa, Nairobi and Nyeri regions reported higher retail prices of 73 KES per Kg, 75 KES per Kg, 80 KES per Kg and 73 KES per Kg respectively compared to the average national retail price of 72KES per Kg. The moderately high prices witnessed can be attributed to a number of factors including high fuel prices since most traders source their maize from Uganda, Busia, Kitale, Kieni in Nyeri County, Kirinyaga County, Namanga as well as locally depending on their proximity to the wholesale traders.

Irish potatoes in Nairobi recorded notably high wholesale and retail prices at 92 KES per Kg and 105 KES per Kg respectively compared to the national averages of 54 KES per Kg and 68 KES per Kg respectively. The considerable price variation can be attributed to the surge in fuel prices

as well as disruptions in transport following the El Nino rains, leading to a scarcity of the commodity.

The Biriani rice variety was present in all regions during the month of November with Eldoret region recording the highest wholesale price of 200 KES per Kg compared to the national average of 137 KES per Kg. The national average retail price of Biriani rice stood at 161 KES per Kg with three regions recording prices higher than that namely: Eldoret, Nakuru and Nyeri. These prices can be attributed to depreciation of the Kenyan Shilling. Pishori rice was present across all the six regions with grade 2 variety exhibiting higher national average and retail price of 184 KES per Kg and 211 KES per Kg respectively. Basmati rice was also common across all regions except in Mombasa. Several rice varieties were peculiar to Mombasa region including Falcon, Fatma, Mpunga, Sunrice and Tamtam. Notably,

Ahero and Pakistan rice varieties were similarly peculiar to Kisumu region.

Wheat was present in all the six regions recording a national average wholesale price of 71 KES per Kg and a national average retail price of 90 KES per Kg. Both Eldoret and Nakuru regions recorded wholesale prices higher than the national average at 80 KES per Kg each. Similarly, Eldoret, Nakuru and Nyeri regions recorded higher retail averages than the national average at 100 KES per Kg, 91 KES per Kg and 125 KES per Kg respectively. Mombasa recorded both the lowest wholesale and retail average prices at 60 KES per Kg and 75 KES per Kg respectively.

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

Product	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		
Dry Beans	Army Green	212		180		151		236		185		158		181	193
	Black Beans (Njahi)	215	151	160	144	149	156	244	227	170	176	156	222	163	199
	Green/Yellow	200	174	165	166	153	139	228	235	170	189	160	178	166	193
	Mwezi Moja	219			162			240			190			193	217
	Mwitemania	180		140	151	136	129	215		150	180	145	175	147	173
	Nyayo	179	141	165	157	144	134	197	210	170	177	153	179	154	181
	Nyota Beans	158						188						158	188
	Pinto Beans		149						220					149	220
	Red Kidney		141						219			135		141	171
	Rosecoco	178	160	170	169	161	152	211	216	180	190	170	200	165	194
	Saitoti	169		125	157	120		196		150	180	122		143	162
	Wairimu	123	141	135	122	94	96	160	198	140	148	96	160	119	150
	White Beans				172						190			172	190
	Yellow	195						223						195	223
Dry Maize	White maize	48	58	75	62	47	50	60	73	75	80	69	73	57	72
	Yellow maize		54		67	87			62		90	89		70	81
Irish Potatoes	Shangi	52	45	56	92	36	45	56	63	75	105	58	51	54	68
Rice	Ahero		158						168					158	168
	Basmati	220	162		144	163	170	240	237		160	178	190	172	201
	Biriani	200	132	110	104	135	137	220	153	120	120	179	171	137	161
	Falcon	164						182						164	182
	Fatma Rice			255						270				255	270
	Mpunga			160						170				160	170
	Pakistan		142				99		164				150	121	157
	Pishori Grade 1	217		175	189	148	166	237		180	209	180	192	174	196
	Pishori Grade 2	200	168					220	202					184	211
	Sindano	215	160	145		149	113	234	250	150		180	152	155	191
	Sunrice			255						260				255	260
	Tamtam			150						160				150	160
Wheat	Wheat	80	68	60	68	80	67	100	90	75	90	91	125	71	90

Source: Daily Market Survey for the month of November 2023

Wholesale and Retail Price Trends by Region

Weekly price variations were noticeable from the first week through to the fifth week.. Eldoret, in particular exhibited a mix of decreasing, stable and increasing prices. Majority of the commodities in this region exhibited a decline in wholesale and retail prices, particularly when week 1 was compared to week 4 and 5. All dry bean varieties exhibited evidently high decline in prices from week 4 to week 5 except for Green yellow and Mwitemania varieties which had stable prices from week 1 through to week 5. Notably, Army green variety exhibited a constant rise in wholesale price from week 1 to week 4. Traders in this region source bean varieties mainly from Uganda, Eastern Kenya, Elgeyo Marakwet, Nandi, Kericho and Meru wholesalers. Most rice varieties exhibited stable wholesale prices except for Falcon rice which recorded a decline from week 1 to week 5. Notably, White maize had the highest wholesale and retail price increase for the month of November. Shangi Irish potatoes saw a dip in prices from week 1 to week 5. Wheat recorded stable prices from week 1 to week 5. Variations in prices for Eldoret region can be attributed to the bumper harvest during the previous season which saw a surplus of food commodities in the markets. However, transportation challenges were evident due to the ongoing El Nino rains hence making it difficult for traders to move food commodities from farms to the market. These challenges have significantly impacted the movement of food commodities from farms to markets, contributing to the complex issue of high food prices in the region.

Similarly, Kisumu region saw a combination of increasing, declining and stable prices between the fifth week and the first week. Dry bean varieties observed in the region exhibited declining wholesale prices ranging from 2% to 7% including: Green/yellow variety and Nyayo variety. On the other hand, rice varieties had a combination of both decreasing and increasing prices ranging from 1% to 26% and 1% and 54% respectively. Notably, Basmati rice variety had the highest increase in retail prices from week 1 to week 5 averaging at 53.63%. The high price increase margin is a as a result of the hike in fuel prices in the recent past as most rice traders source this rice variety from Kirinyaga County hence incurring high transport cost. In contrast, Shangi Irish potatoes saw a decline in prices ranging from 6% to 22%. Wheat saw a combination of increasing, declining and stable prices for the five weeks.

In Mombasa, an analysis of wholesale and retail prices during week 5 compared to week 1 indicated consistent pricing for all commodities. The stability in prices is attributed to the ample availability of produce from nearby producing regions.

FOCUS ON WHEAT ACROSS SELECTED REGIONS

Wheat plays a vital role as a staple crop in Kenya, contributing substantially to the country's daily calorie intake. Currently, wheat stands as the second largest grown cereal crop in Kenya after maize. Nonetheless, Kenya encounters difficulties in fulfilling its wheat demand, primarily due to low yields, ineffective farming methods, and poor post-harvest management practices especially when climatic conditions are wet during harvesting. Kenya is yet to achieve self-sufficiency in production and hence the gap between demand and supply continues to widen. To meet the growing demand for wheat, the country is forced to import mainly from Austria, Russia, Argentina Ukraine and Canada.

In Kenya, wheat is mainly grown in the Rift Valley (Narok, Nakuru, Uasin Gishu &Trans Nzoia counties) and Nanyuki. Wheat thrives under dry climatic conditions and good soil drainage. More specifically, wheat does well in moderate rainfall, an altitude range of 1500-2900m above sea level and a relatively warm temperature range of 15-25 degrees centigrade according to an article by Knowledge Centre on Wheat growing, (2023). The most common wheat variety grown in Kenya is Durum which is used in making of pasta, couscous and bulgur. Other wheat varieties grown in the country include Kenya kingbird, Kenya eagle, KS-Chui, Robin, Pasa, Kenya Chirika, Ks Mwamba, Ks Farasi, Mbega, Ngamia, Duma, Kenya Tembo, Kenya Mbweha, Kenya nungu, Kenya Kulungu, Kenya paka, Kenya Nyangumi, Kenya Nyambu, Kenya Kongono, Kenya Fahari, Kenya popo, Mbuni, Kenya Kwale. According to an article by Kimani (2023), there are numerous ways in which wheat can be prepared including: steaming, boiling, and frying. In Kenya, wheat is typically milled into flour which is then used to prepare a wide range of foods including: bread, muffins, noodles, cereal bars, pasta, biscuits, mandazis, chapatis, cakes, pastries among others.

Wheat was present across all the regions with Mombasa recording both the lowest average wholesale and retail prices of KES 60 and KES 75 per Kg respectively. The wholesale prices of wheat were higher than the national average in Eldoret and Nakuru regions while the retail prices were higher than the national average in Eldoret and Nyeri regions. Both Kisumu and Nairobi regions recorded a decrease in the wholesale wheat prices while Nakuru recorded an increase in the wholesale prices. On the other hand, Kisumu recorded an increase in the retail prices while Nakuru region saw a dip in retail prices

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

Wheat		
Average Wholesale price (KES/Kg)	Eldoret	80
	Kisumu	68
	Mombasa	60
	Nairobi	68
	Nakuru	80
	Nyeri	67
Average Retail price (KES/Kg)	Eldoret	100
	Kisumu	90
	Mombasa	75
	Nairobi	90
	Nakuru	91
	Nyeri	125
Total Average wholesale price (KES/Kg)		71
Total Average retail price (KES/Kg)		95

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

Nairobi region exhibited a combination of stable, and declining food commodity prices from week 1 through week 5 with a few showing increasing prices. Significantly, there was a decrease in wholesale prices for all bean varieties, ranging from 1% to 33%. This decline can be linked to the abundant harvest in high-producing regions of the country, such as Kirinyaga County, where favorable weather conditions resulted in surplus produce of Wairimu beans. While most rice varieties maintained stable prices, Biriani and Pishori Grade 1 rice varieties experienced a decline of 2% and 5%, respectively, during the fifth week. Shangi Irish potatoes experienced a notable decrease in both wholesale and retail prices, showing a decline of 15% in wholesale and 9% in retail when comparing week 1 to week 5. This decline in Irish potato prices can be linked to a bumper harvest in high-producing counties, particularly Nyandarua County, a significant source for traders. Wheat prices remained generally stable, except for the fifth week, where wholesale prices saw a 4% drop

Similarly, in the Nakuru region, there were fluctuations in prices, indicating declines and stability in retail prices when comparing week 1 prices to week 5. Most bean varieties maintained stable prices, except for Army green and Black beans, which experienced an increase in wholesale prices by 4% and 2% respectively. Nyayo and Wairimu, on the other hand, showed a reduction in wholesale prices by 4% and 2%, respectively. Both yellow and white maize varieties experienced a decrease in both wholesale and retail prices. Shangi Irish potatoes witnessed a significant decline in wholesale (26%) and retail prices (19%), attributed to surplus produce caused by the ongoing rains. This decline in Shangi Irish potato prices was a result of surplus production, particularly in neighboring regions within the Rift Valley, where most traders source their products. Most rice varieties maintained stable prices, except for Basmati rice, which saw an increase in wholesale prices and a decline in retail prices. Notably, wheat experienced an 11% increase in wholesale prices and a 4% decline in retail prices.

In the Nyeri region, there were fluctuations in wholesale prices, with some commodities experiencing declines and others seeing increases. For retail prices, most commodities witnessed a decline, while a few maintained stable prices. Notably, a handful of bean varieties exhibited a slight increase in wholesale prices ranging from 1% to 9%. All rice varieties showed a wholesale price drop trend. Notably for this region, Shangi Irish potatoes had the highest decline in both wholesale and retail prices throughout the weeks Traders in this region source Shangi Irish potatoes mainly from the neighbouring Nyandarua County which experienced a surplus in production due to the ongoing rains. Both white maize and yellow maize varieties also saw a drop in prices through put the weeks, which can be attributed to surplus production within the County.

Comparison of National Average Prices between October and November

A comparison of overall prices (national averages for all commodities) for October and November 2023 (Table 2) shows that both the wholesale and retail prices of most food commodities had remained constant (<4 but >-5), while only a handful had increased (>4 but < 17) and decreased (>-5 but<-25) in prices. Notably, only Ahero rice variety exhibited a substantial wholesale price increase of 34% attributable to scarcity and high demand. On the other hand, Shangi Irish potatoes exhibited a dip in both the wholesale and retail prices of (-21%) and (-25%) respectively. This drop in prices of Shangi Irish potatoes can be as a result of the ongoing rains which led to high production of the commodity especially in Nyandarua County which stands out as a major supplier of Irish potatoes across the country as well as import supplements from countries such as Tanzania. Various bean varieties also saw a decline in prices including Black beans, Wairimu beans and white beans.

Table 2: Comparison of October and November prices

Product	Variety	Average wholesale price (KES/Kg)		Percentage Change	Average Retail price (KES/Kg)		Percentage Change
		October	November		October	November	
Dry beans	Army green	177	181	2%	195	193	-1%
	Black beans (Njahi)	174	163	-6%	217	199	-8%
	Green/yellow	165	166	1%	193	193	0%
	Mwezi moja	183	193	5%	213	217	2%
	Mwitemania	145	147	1%	172	173	1%
	Nyayo	153	154	1%	182	181	-1%
	Pinto beans	150	149	-1%	218	220	1%
	Red kidney	121	141	17%	179	171	-4%
	Rosecoco	163	165	1%	194	194	0%
	Saitoti	143	143	0%	163	162	-1%
	Wairimu	128	119	-7%	161	150	-7%
	White beans	180	172	-4%	200	190	-5%
	Yellow	177	195	10%	199	223	12%
Dry maize	White maize	55	57	4%	73	72	-1%
	Yellow maize	70	70	0%	81	81	0%
Irish potatoes	Shangi	68	54	-21%	91	68	-25%
Rice	Ahero	118	158	34%	160	168	5%
	Basmati	169	172	2%	201	201	0%
	Biriani	137	137	0%	163	161	-1%
	Falcon	180	164	-9%	200	182	-9%
	Fatma rice	255	255	0%	270	270	0%
	Mpunga	160	160	0%	170	170	0%
	Pakistan	108	121	12%	153	157	3%
	Pishori grade 1	173	174	1%	198	196	-1%
	Pishori grade 2	179	184	3%	216	211	-2%
	Sindano	162	155	-4%	194	191	-2%
	Sunrice	255	255	0%	260	260	0%
	Tamtam	150	150	0%	160	160	0%
Wheat	Wheat	72	71	-1%	91	90	-1%

Key

<4 but >-5	Stable
>-5 but<-25	Decrease
>4 but < 17	Increase
> 17	substantial Increase

Source: Daily Market Survey for the month November 2023

FOCUS ON NYERI REGION

Nyeri County, situated in the central region of Kenya, is one of the country's 47 counties. The county boasts a diverse landscape, featuring hills and fertile plains. With its capital and largest town being Nyeri, the region is recognized for its vibrant agricultural sector. As of the 2019 Kenyan population and housing census, Nyeri County has a population of 759,164, reflecting a 9.5% increase from the previous census conducted in 2009. Agriculture is a key economic activity in the county, with a focus on coffee and tea farming, dairy farming, horticulture, and livestock rearing. These activities constitute the primary sources of income for most of the population in the region.

The county's key food crops comprise maize, beans, wheat, bananas, Irish potatoes, sweet potatoes, and diverse vegetables. Agribusiness stands out as a vital economic activity in the county, leading to the direct sourcing of goods from local farmers and neighboring counties. Prices for the targeted crops were collected at the current Karatina open-air market, which is East Africa's second-largest regional trade hub for both wholesale and retail transactions. Situated in Karatina Town, this open-air market caters to the majority of the region's surrounding sub-counties and counties. Both the wholesale market and the retail area offer a diverse array of products, including various fruits and vegetables, cereals, and an assortment of other market goods.

In November, there was a general upward trend in wholesale prices for most food commodities when comparing week 1 to weeks 2 to 5, with increases ranging from 1% to 10%. Significantly, there was a notable decrease in the wholesale price trends of white maize by 13% and Shangi Irish potatoes by a substantial 37%. This can be attributed to the abundant availability of these commodities in the region, driven by a bumper harvest.

Table 3: Average Retail and Wholesale Prices, Nyeri Region

Product	Variety	Average Wholesale Price (KES/Kg)					Average Retail Price (KES/Kg)					Total Average wholesale price (KES/Kg)	Total Average retail price (KES/Kg)
		Week 1	Week 2	Week 3	Week 4	Week 5	Week 1	Week 2	Week 3	Week 4	Week 5		
Dry Beans	Black Beans (Njahi)	160	156	156	152	161	225	225	225	213	225	156	222
	Green/Yellow	144	136	143	135	136	186	175	178	175	175	139	178
	Mwitemania	122	122	133	133	133	175	175	175	175	175	129	175
	Nyayo	133	133	133	134	139	186	183	175	175	175	134	179
	Rosecoco	144	148	156	156	156	200	200	200	200	200	152	200
	Wairimu	99	99	98	89	97	171	160	158	157	155	96	160
Dry Maize	White Maize	54	53	49	47	47	79	75	73	70	73	50	73
Irish Potatoes	Shangi	62	46	44	40	39	63	52	50	48	45	45	51
Rice	Basmati	172	172	168	168	171	190	190	190	190	190	170	190
	Biriani	140	134	135	136	144	170	170	170	170	175	137	171
	Pakistan	100	98	96	98	108	150	150	150	150	150	99	150
	Pishori Grade 1	170	170	164	167	160	200	200	192	183	185	166	192
	Sindano	124	118	103	98	130	150	150	150	150	165	113	152
Wheat	Wheat					67						67	125

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

Outlook for the Month of December

During the month of December, the following changes are expected:

- The upcoming festive season is anticipated to lead to an upsurge in prices for major food commodities, driven by the heightened demand expected in December.
- Prices of major food commodities are anticipated to experience an increase, driven by the expected rise in fuel prices.
- The ongoing El Nino rains across the country are anticipated to result in poor road networks in most high-producing regions, leading to an escalation in prices. However, on the positive side, the production of food commodities is expected to increase, potentially alleviating the country from drought conditions according to FEWS NET (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 Kenya[1].

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).

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[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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