

Voluntary Report – Voluntary - Public Distribution

Date: September 22, 2025

Report Number: KE2025-0021

Report Name: Grain and Feed - Field Report

Country: Kenya

Post: Nairobi

Report Category: Agriculture in the News, Grain and Feed, Trip Report

Prepared By: Kennedy Gitonga and Damian Ferrese

Approved By: Bret Tate

Report Highlights:

In August 2025, Agricultural Specialists from FAS Nairobi visited wheat and corn producers, aggregators, millers, and distributors across Kenya to gather information on the status of the current crop. Adequate rainfall reported by producers in 2025 suggests that wheat and corn production will return to their normal levels in marketing year (MY) 2025/26, in line with official USDA estimates. Post continues to expect Kenyan farmers will produce around 4.4 million metric tons of corn (48.9 million bags), and 280,000 metric tons (3.1 million bags) of wheat this year. Kenyan farmers report challenges with access to fertilizers, traditional drying methods, and grain storage.

In late August 2025, FAS/Nairobi conducted field visits and interviews with contacts across the corn and wheat value chains. Agricultural Specialists interviewed producers, aggregators, millers, and distributors in most of the major grain-growing regions of Kenya. This report is an overview of the market intelligence gathered during those visits and does not reflect any official changes to post estimates. Tables 1 and 2 were published in March 2025 and are included here for reference only.

Corn

Table 1: Production, Supply, and Distribution

Corn Market Year Begins Kenya	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2200	2300	2150	2100		2300
Beginning Stocks (1000 MT)	210	210	421	417		267
Production (1000 MT)	4284	4230	4000	3800		4400
MY Imports (1000 MT)	430	430	300	200		150
TY Imports (1000 MT)	310	305	300	300		250
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	4924	4870	4721	4417		4817
MY Exports (1000 MT)	3	3	5	0		5
TY Exports (1000 MT)	3	3	5	0		5
Feed and Residual (1000 MT)	400	450	400	350		400
FSI Consumption (1000 MT)	4100	4000	4000	3800		4000
Total Consumption (1000 MT)	4500	4450	4400	4150		4400
Ending Stocks (1000 MT)	421	417	316	267		412
Total Distribution (1000 MT)	4924	4870	4721	4417		4817
Yield (MT/HA)	1.9473	1.8391	1.8605	1.8095		1.913
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

This marketing year, most of Kenya's key corn growing regions received adequate seasonal rains, marking a return to normal production levels following a dry MY 2024/25. Harvesting has already begun in the lower altitude areas of the South Rift Valley and is expected to progress as normal, peaking in September/October in the North Rift Valley. FAS Nairobi anticipates that the current corn harvest will be in line with earlier estimates of 4.4 million metric tons, or 48.9 million 90-kilogram bags.

Interviews suggest that harvested area will also hold steady at around 2.3 million hectares. Farmers note that much of the movement from corn to alternative crops like avocado and sugarcane have abated due to the high investment and operational capital needed to make the change. Both sugar and avocado, two substitute crops of choice, require large capital investments in planting, handling, transportation and storage, which disincentivizes many would-be farmers.

The government of Kenya continues to supply farmers with fertilizers under the subsidy program that was re-launched in 2022. Farmers indicate that the new fertilizer program continues to face challenges with the timeliness of delivery and overall supply. Many farmers noted that they were forced to purchase fertilizers from commercial vendors, as the public program was unable to supply the product when

needed and in sufficient quantities. The average price of subsidized fertilizer at the time of planting was 2,800 Kenyan Shillings (\$21.37) per 50-kilogram bag, while commercial fertilizers were retailing at an average of 5,000 Shillings (\$38.70) per bag.

Figure 1: A Corn Field, Nakuru County, August 2025



Source: FAS/Nairobi

Figure 2: Recently Harvested Corn Field, Nakuru County, August 2025



Source: FAS/Nairobi

Trade

The Kenyan government is currently reporting MY 2024/25 corn imports of 436,000 metric tons. This is higher than FAS Nairobi's earlier estimate of 200,000 metric tons. [Note: Kenyan reported data are for reference only and do not reflect a change to post estimates.] Tanzania accounts for a significant majority of Kenya's corn imports, reported at 410,000 MT in MY 2024/25. Importer contacts indicate that the current crop of Tanzanian corn suffers from low quality and high levels of aflatoxin. Imports from Uganda, which acted as a stopgap to meet demand from MY 2023/24 (10,000 MT) to MY 2024/25 (5,000 MT), are estimated to return to near-zero levels for MY 2025/26.

In April 2025, Cabinet Secretary for Agriculture Mutahi Kagwe announced a waiver of the 50 percent duty on the importation of 5.5 million 90-kilogram bags (495,000 MT) of yellow corn. That duty waiver, however, has yet to be published in the Official Gazette, leaving supplies for animal feed tight and prices high.

Figure 3: Corn Stored at an Aggregation Facility, Narok County, August 2025



Source: FAS/Nairobi

Demand

Sources report that farmgate corn prices are declining. In July 2025, corn cost 4,000 Kenyan Shillings per 90-kilogram bag, or \$344 per metric ton. At the time of interviews in late August 2025, the price had slid to 3,250 Shillings per 90-kilogram bag, or \$280 per metric ton. Contacts suggested that millers may delay purchases until the prices stabilize.

Post contacts estimate that the Kenyan National Cereals and Produce Board (NCPB) is currently holding corn stocks estimated at 200,000 90-kilogram bags, or 18,000 metric tons. The NCPB has long held public stocks through its strategic reserves purchase program, though the future of public stocks is now uncertain. NCPB's installed capacity is estimated at 1.98 million metric tons; however, many of their facilities are in disuse or disrepair and others have been leased to the private sector. In May 2025 NCPB made corn stocks available to millers at a subsidized rate, but uptake is slow. Millers are hesitant to buy because of earlier payment issues with the board and potential aflatoxin contamination in NCPB's stores.

In the earlier subsidy system, circa 2022-23, millers were required to sell corn flour at a reduced rate to retailers. The difference between the mandated lower rate and the natural market rate was to be paid by the Kenyan Government. Contacts in the milling industry report that they are still owed large sums of money from that earlier scheme and are hesitant to enter into any new programs run by the National Cereals and Produce Board.

Stocks

Abundant rains in July and August have complicated the ongoing harvest period, making it difficult to dry the crop using traditional methods. Post expects higher moisture levels to result in increased waste and potentially higher levels of aflatoxins. The less-than-optimal drying conditions also may lead to reduced quality, tightened supply, increased prices, and lower ending stocks. Further, machine dryers provided and installed by county governments have been reported to have limited functionality, forcing farmers to rely on traditional methods.

Wheat

Table 2: Production, Supply, and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Kenya	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	104	0	110	0	100	0
Beginning Stocks (1000 MT)	270	270	323	0	166	0
Production (1000 MT)	310	0	265	0	280	0
MY Imports (1000 MT)	2475	0	2307	0	2600	0
TY Imports (1000 MT)	2475	0	2307	0	2600	0
TY Imp. from U.S. (1000 MT)	0	0	56	0	0	0
Total Supply (1000 MT)	3055	270	2895	0	3046	0
MY Exports (1000 MT)	82	0	29	0	100	0
TY Exports (1000 MT)	82	0	29	0	100	0
Feed and Residual (1000 MT)	150	0	150	0	150	0
FSI Consumption (1000 MT)	2500	0	2550	0	2600	0
Total Consumption (1000 MT)	2650	0	2700	0	2750	0
Ending Stocks (1000 MT)	323	0	166	0	196	0
Total Distribution (1000 MT)	3055	0	2895	0	3046	0
Yield (MT/HA)	2.9808	0	2.4091	0	2.8	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Similar to corn, Kenya's wheat production areas have received ample rainfall this marketing year and farmers expect slightly higher production as compared to MY 2024/25. In Narok County, the wheat harvest and delivery to aggregation centers is currently underway. Narok County produces around half of Kenya's total wheat production.

Figure 4: Limited Wheat Storage, Narok County, August 2025



Source: FAS/Nairobi

To the west of Narok, in the Trans Mara region, two new sugar mills are under construction and expected to open in 2026. Once the two mills become operational, some farmers are expecting a shift to sugarcane farming, which could have an impact on wheat area planted, ultimately driving down total production. In other parts of the country, movement to other crops has slowed because of high capital costs and limited technical support.

As with other grains this season, wheat drying and storage has been a problem and could increase post-harvest loss. Farmers interviewed reported other issues potentially impacting future yields, such as herbicide resistance and a degradation of disease resistance in hybrid varieties, attributed to seed recycling.

Policy

The Government of Kenya has continued its intervention in wheat markets through a government-run wheat purchase scheme. The system is a negotiated arrangement between producers and millers that requires millers to prioritize the purchase of locally produced wheat over imports. In short, the millers agree to pay a set price to farmers during harvest so that the local crop is exhausted before imports resume. A large private company acted as a middleman between farmers and millers aggregating grain.

In 2025, the scheme fell into disarray after the largest aggregators closed operations mid-season. The government announced a stop-gap measure, directing the NCPB to purchase wheat directly from farmers. The scheme has since resumed after several smaller aggregators gained authorization to collect wheat from farmers. Currently the negotiated price for Grade I wheat is 4,750 Kenyan Shillings (\$36.77) per 90-kilogram bag down from 5,300 Shillings (\$41.03) per bag in 2025.

Figure 5: Wheat Drying Covered by Tarps, Narok County, August 2025



Source: FAS/Nairobi

Attachments:

No Attachments.