Central Bank of Kenya

Agriculture Sector Survey

March 2025

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1. BACKGROUND

Agriculture is a key pillar of the Kenyan economy. The sector is a vital source of employment and economic growth both directly and indirectly through forward and backward linkages with the other sectors of the economy. The agriculture sector supports the other sectors of the economy by providing raw materials for manufacturing and supplies for wholesale and retail trade. Agricultural exports, notably tea, coffee and horticultural crops (vegetables, fruits and cut flowers) are important sources of foreign exchange for the country. Thus, the sector plays an important role as a source of income, particularly to the rural households where agriculture is the main source of livelihoods. Domestically, the performance of the sector has implications for food inflation and therefore overall inflation.

The real Gross Domestic Product (GDP) growth outcome for the last quarter of 2024 and the first quarter of 2025 is not yet available. Based on Kenya National Bureau of Statistics (KNBS)' Quarterly Gross Domestic Product Report, Third Quarter 2024, the Agriculture, Forestry, and Fishing sector grew by 4.2 percent in the third quarter of 2024, compared to 5.1 percent growth in the third quarter of 2023. Growth was mainly supported by the favourable weather conditions that prevailed in the first three quarters of 2024 and government interventions particularly the provision of subsidised fertiliser. For instance, the good weather supported growing of sugarcane and milk production. Cane deliveries increased to 2,523.5 thousand metric tonnes in the third quarter of 2024 compared to 874.0 thousand metric tonnes in the third quarter of 2023. Over the same period, milk intake by processors increased to 224.1 million litres from 210.4 million litres. There was, however, a 12.2 percent decline in tea production from 138,771.6 metric tonnes in the third quarter of 2023 to 121,868.3 metric tonnes in the third quarter of 2024.

Given that developments in the agriculture sector have significant impact on the supply and prices of key food items in the consumer price index (CPI), the Monetary Policy Committee (MPC) of the Central Bank of Kenya (CBK) continuously monitors developments in the sector through a survey conducted in select regions to gather information on indicative prices of basic commodities, output and expected trends.

More specifically, the survey focuses on the following:

i. Indicative prices of select key agricultural food items and the general price expectations.
ii. Assessment of output and acreage of select food items, and expectations.
iii. Access to, usage and barriers to farm inputs for agricultural production.
iv. Factors affecting agricultural production and marketing/sale of farm produce.
v. Indicative information on access and use of credit facilities.
v. Suggestions on how to improve agricultural production.

This report presents results of a survey undertaken during the period of March 10-14, 2025. Mixed outcomes were noted regarding changes in prices of vegetables in March 2025 relative to February 2025. This outcome largely reflects seasonal factors. On balance, respondents expect prices of key food items, particularly cereals and related products, to increase in April 2025 while prices of kales, spinach and traditional vegetables are expected to decline in line ongoing March-May long rain season. Expectations in relation to overall inflation point to easing price pressures both in one month and three months' horizon. A large proportion of respondents expect the performance of the agriculture sector to improve both three months and one year ahead, driven by favorable weather outlook and continued various government interventions. The findings of March 2025 survey were consistent with the findings of September 2024, November 2024 and January 2025 surveys in which respondents were largely optimistic about expected performance of the agricultural sector. Optimism about overall economic performance in the next three months and next one year increased in March 2025 relative to January 2025.

2. METHODOLOGICAL FRAMEWORK

The March 2025 survey, like previous MPC surveys of agriculture sector, gathered information on wholesale and retail prices of select food items, expectations regarding changes in prices and output, and factors that affect agricultural production. The survey drew respondents from select wholesale and retail markets and select farms in key food basket regions. These included Nairobi Metropolitan area, and neighbouring counties such as Kiambu, Kajiado and Machakos. Other areas covered included Naivasha, Gilgil, Nakuru, Narok, Bomet, Kericho Kisumu, Mombasa, Kisii, Eldoret, Kitale, Nyandarua, Nyahururu, Mwea, Isebania, Meru, Nyeri, Isiolo, Oloitoktok, Namanga, Makueni and Molo and some parts of Western Kenya.

The coverage and scope of the survey has continued to expand over time, thereby enhancing the response rate. The data was collected using face to face interviews with retailers, wholesalers and farmers in select markets and farms. A total of 312 respondents were sampled out of which farmers and retailers accounted for 51 percent and 35 percent, respectively, while wholesalers accounted for 14 percent **(Figure 1a and 1b).**

Figure 1a: Sample composition (Percent)

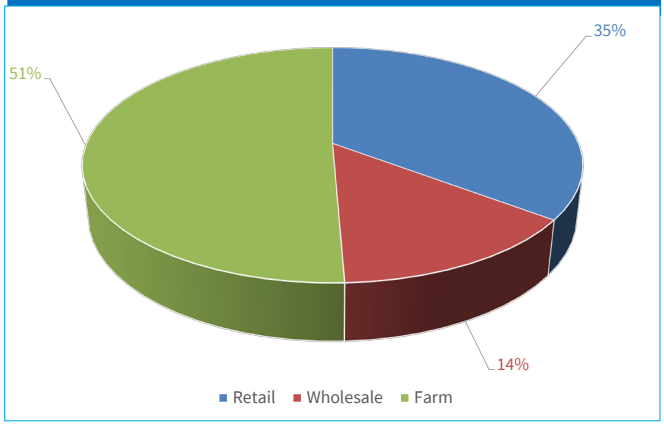
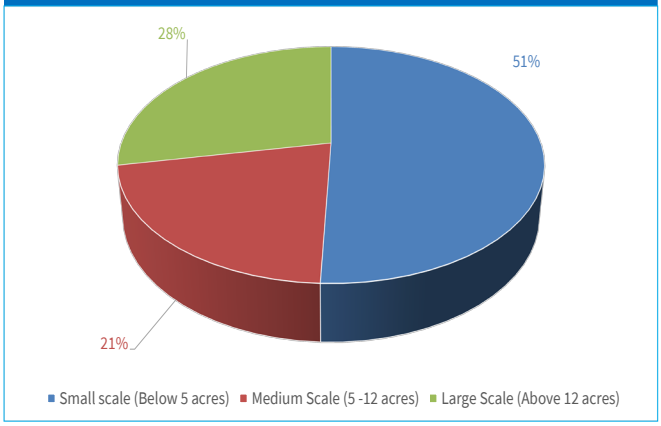


Figure 1b: Farm categorization (Percent)



Analysis of the information collected was undertaken using both quantitative and qualitative approaches, with findings presented using summary measures, tables and/or charts. These include averages, percentages and balance of opinion (BOO). The BOO is a key tool used in the analysis to show on a net basis the expected directional change in relation to variables of interest such as retail and wholesale prices of select food commodities, acreage under crop and farm produce/output. In general, the BOO metric reveals the net position with regard to responses to selected questions such as where the respondents see the economy going in the future. The BOO is generally defined as the difference between the proportion of respondents having expressed a positive opinion and the proportion of respondents having expressed a negative opinion divided by the total number of respondents. The computation of BOO facilitates conversion of qualitative responses into quantifiable values.

For instance, with regard to inflation, the survey sought respondents' views about whether they expected inflation to increase, remain unchanged or decrease in the next one month and three months ahead. The BOO gets the net positions of respondents and, therefore, helps shed light on the direction where, on balance, most of the responses are concentrated, after taking into account all the responses to the particular question. It is important to note that a respondent's expectations about inflation or economic performance could vary depending on the time horizon, for instance, a respondent could expect inflation to increase one month ahead but decrease three months ahead, and vice versa. The same applies to expectations about economic performance.

The survey also sought to understand how respondents expected the agriculture sector to perform in the next three months and one year ahead. The objective is to have separate expectations for agriculture sector performance and overall economic growth since the latter encompasses the industrial and service sectors, in addition to agriculture.

3. MAIN HIGHLIGHTS FROM THE SURVEY

This section highlights the key findings from the March 2025 Survey, which are as follows:

i. There was a mixed outcome regarding prices of food items whereby some items such as spinach, kales - sukuma wiki, green maize maize grain -loose and maize flour recorded increases while others recorded declines in March 2025 relative to February 2025, largely reflecting seasonal factors.

ii. On balance, respondents expect prices of key food items, particularly cereals and related products, to increase in April 2025. This largely reflects seasonality as April is usually a non-harvest month for most cereals. However, respondents expect prices of fast growing vegetable items to decline given the March-May rain season.

iii. Expectations point to easing price pressures both in one month and three months horizon in line with the favourable weather outlook.

iv. Over 60 percent of sampled farmers have reported to have accessed the subsidized fertilizer with most farmers reporting positive impact on output. This finding has been consistent in the last four surveys.

v. The most sought inputs are inorganic fertiliser and pesticides/herbicides with 82 percent and 49 percent of sampled farmers, respectively, reporting that they were the most important inputs in production.

vi. Expectations about change in acreage and output of key food items remained largely positive in March 2025, similar to findings in January 2025, mainly driven by the long rain season outlook and government interventions that have had a positive impact on output.

vii. A relatively higher proportion of respondents (83 percent) expect the performance of the agricultural sector in the next three months to improve or remain unchanged in March 2025 compared to January 2025 (75 percent).

viii. The proportion of respondents optimistic about overall economic performance in the next three months and the next one year increased in March 2025 compared to January 2025.

3.1 Prices of key agricultural commodities

The analysis of the data shows mixed price performance across the commodities in March compared to February 2025. For instance, the survey noted a general price increase in maize and maize products, some rice varieties and select vegetable items. However, price declines were noted particularly on unpeeled garden peas, green grams, cabbages, tomatoes, milk and wheat flour **(Figures 2a and 2b).**

Figure 2(a): Monthly changes in retail prices of select food items in non-core CPI (Percent)

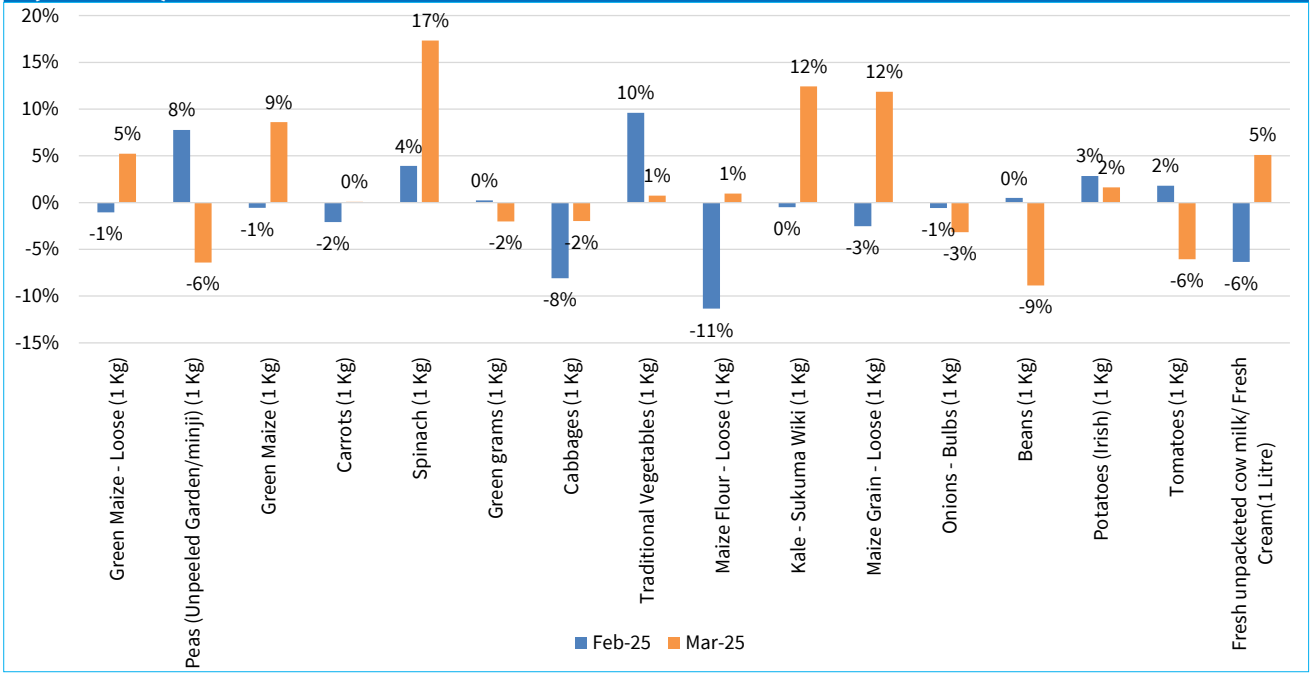
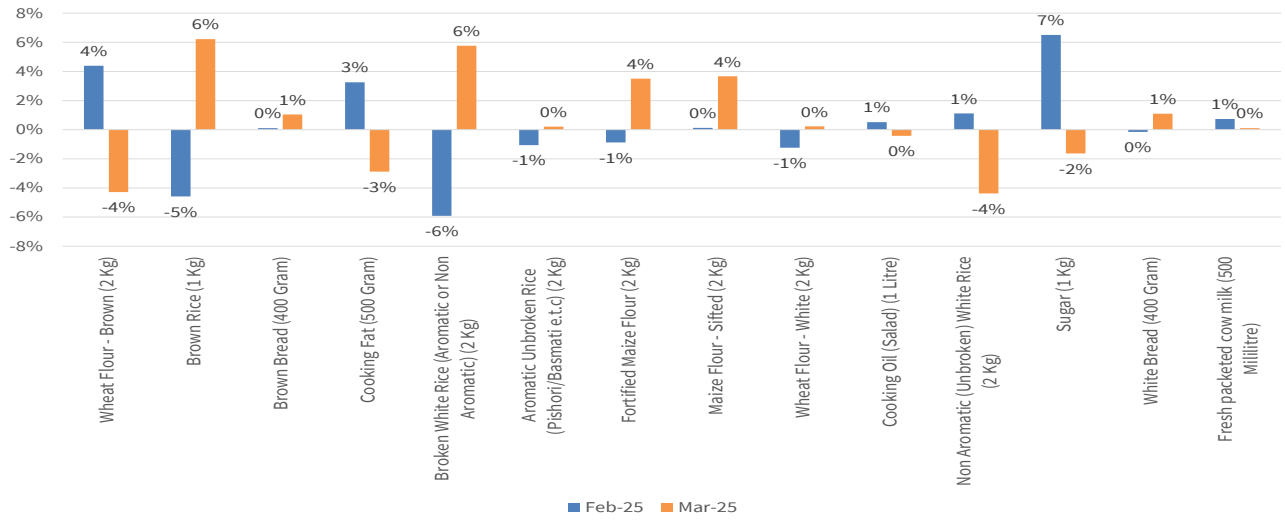


Figure 2(b): Monthly changes in retail prices of select food items in core CPI (Percent)



3.2 Expectations of prices of key food items

Balance of opinion (BOO) on expected price changes shows prices of key food items are expected to increase in April 2025, mainly cereals and select vegetables. Respondents expect prices of maize products and related items to be relatively higher in April 2025 relative to March 2025, mainly reflecting seasonal patterns. In addition, respondents expected the prices of sugar, cooking fat and cooking oil (salad) to also pick up, reflecting developments in the global market where prices of these items have been rising in the recent past.

In line with the expected long rain season, prices of fast-growing vegetable items, particularly kales-sukuma wiki, traditional vegetables, cabbages and spinach are, however, expected to decline in April 2025. However, tomato prices are expected to increase mainly reflecting expected decline in supply as a result of the long rains **(Figure 3 and 4).**

Figure 3: Expected price changes for key food items in the core CPI basket in the next one month (Percent of respondents)

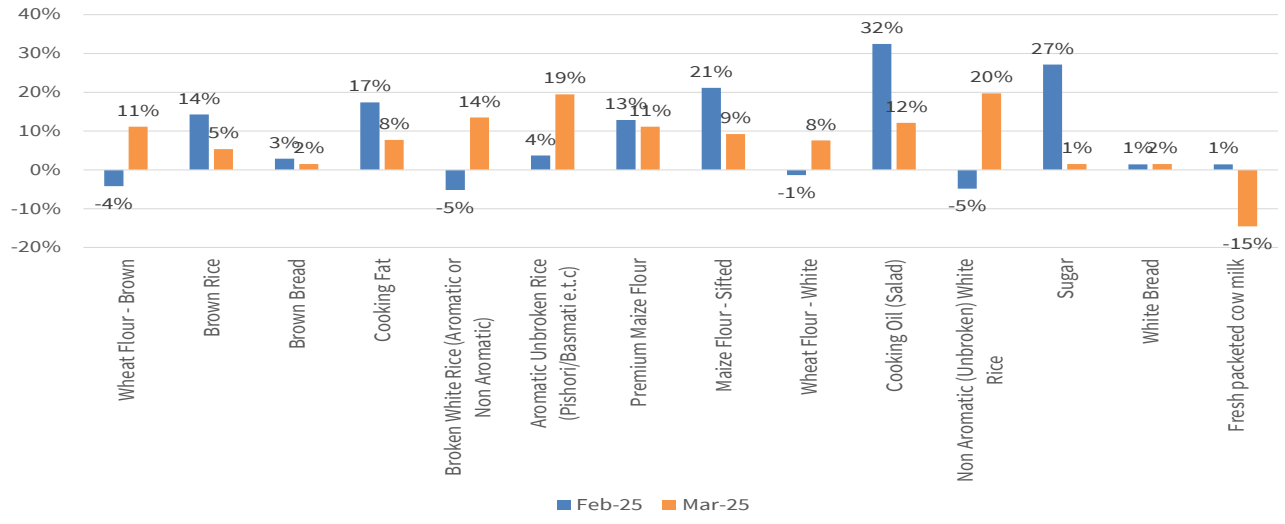
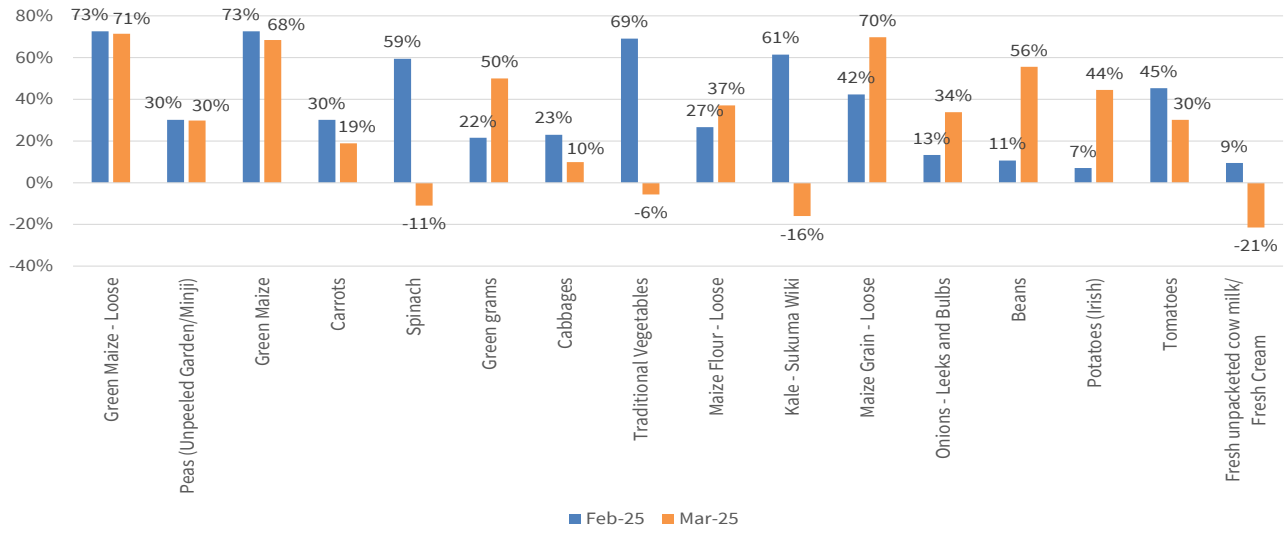
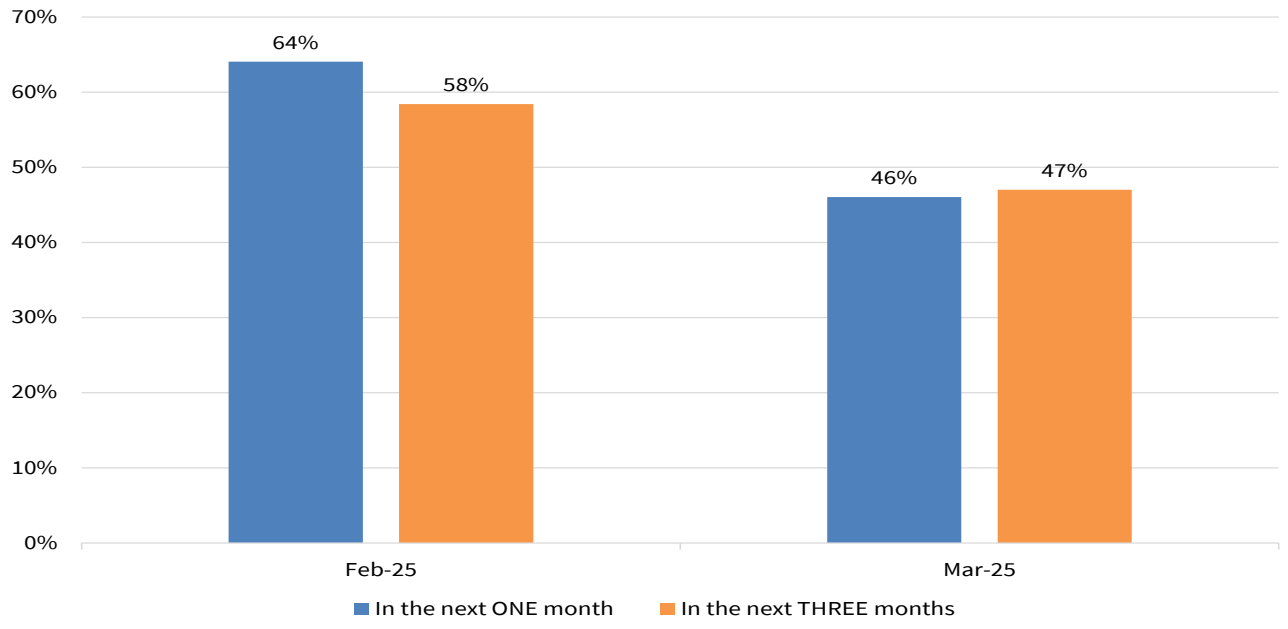


Figure 4: Expected price changes for key food items in the non-core CPI basket in the next one month (Percent of respondents)



The survey further showed that the proportion of respondents expecting overall inflation to increase in the next one month and next three months declined in March relative to February 2025 **(Figure 5).** This is in line with the expectations of adequate food supplies following the onset of the long rains season.

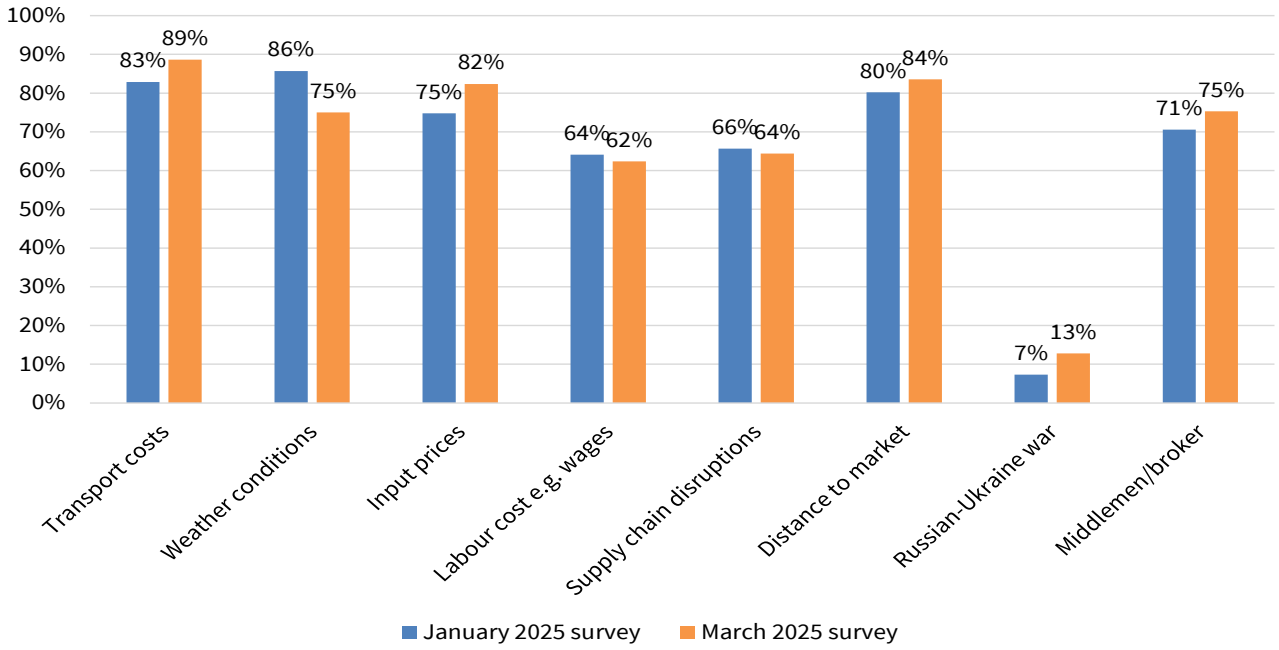
Figure 5: Inflation expectations in the next three months (Percent of respondents expecting inflation to increase)



3.3 Factors affecting retail and wholesale prices

The March 2025 survey, like previous surveys, sought to establish the factors that influence wholesale and retail prices of select food items. The proportion citing the impact of adverse weather conditions (drought, floods) declined to 75 percent in March 2025 from 86 percent in January 2025. This result was expected given that January is usually climatologically a dry month compared to March **(Figure 6 and Annex Figure 17).** The proportion reporting labour costs and supply chain disruptions as a factor influencing retail prices remained more or less unchanged in January and March 2025 surveys. However, the proportion reporting transport costs as a factor influencing retail prices increased to 89 percent from 83 percent in January 2025, as retailers and wholesalers reported that they were forced to travel longer distances to find supplies owing to above normal temperatures from January 2025 which had reduced supply of select fast-maturing vegetables. The proportion of respondents citing input prices also increased to 82 percent in March 2025 from 75 percent in January 2025, as farmers adjusted their farmgate prices upwards to reflect the increased costs of inputs. Additionally, there was increased concern around middlemen/brokers, as 75 percent of the sampled retailers and wholesalers cited middlemen as a key factor driving prices compared to 71 percent in January 2025.

Figure 6: Factors affecting retail prices (Percent of respondents)



3.4 Analysis of output

3.4.1 Output performance and expectations

This section describes the outcomes of the March 2025 agriculture survey regarding farmers' views on expected changes in output and acreage for select crops. This is important because a significant change in output, if realised, would have implications for market supplies and food inflation, which would in turn affect overall inflation. Likewise, a shift in acreage would have implications for crop output, holding constant the influence of any other relevant factors in determining output. Changes in acreage and output would affect overall GDP as well as inflation.

3.4.2 Output performance across food crops

Most sampled farmers in the March 2025 survey were optimistic that output of most food crops was generally expected to increase, largely driven by the expectation of favourable rainfall outcome for the March-May 2025 long rains season and expected continuation of government measures, particularly the subsidised fertiliser programme. Some farmers underscored the adoption of smart agriculture farming methods, which despite being limited in scope, were gaining traction as a potential source of farm income.

3.4.3 Expectations about output and acreage

On balance, most farmers sampled in the March 2025 survey expect an increase the acreage of their crops **(Figure 7a & 7b).** This was largely driven by the expectation of favourable rainfall outcome from the March-May 2025 long rains season and expected continuation subsidised fertiliser programme. In particular, acreage of maize, beans, sugarcane, kales/sukuma wiki, spinach, and millet is expected to increase. However, acreage of some crops such as onions, carrots, wheat and rice was expected to decrease. Various reasons were given for the expected reduction in acreage. Onion farmers, for instance, stated that the sharp reduction in the wholesale and retail price of onions had reduced their incomes and were, hence, switching to other crops to supplement their incomes. Additionally, wheat farmers cited a number of challenges encountered, including prohibitive costs of inputs particularly seeds and pesticides, unpredictable rainfall patterns and pests and diseases resistant to pesticides and herbicides that has led to a significant reduction in output and incomes, and the stiff competition from cheap imports despite good harvests. Consequently, a number of wheat farmers have transitioned to maize in the coming season. Consistent with the findings in previous surveys, the decision to change acreage was not just a function of expected rainfall. It was also influenced by other considerations such as the need for crop rotation, expected demand conditions, availability of affordable and quality seeds and the cost of land preparation for the specific crop.

Figure 7(a): Balance of opinion on expected change in acreage for select crops (Percent of respondents)

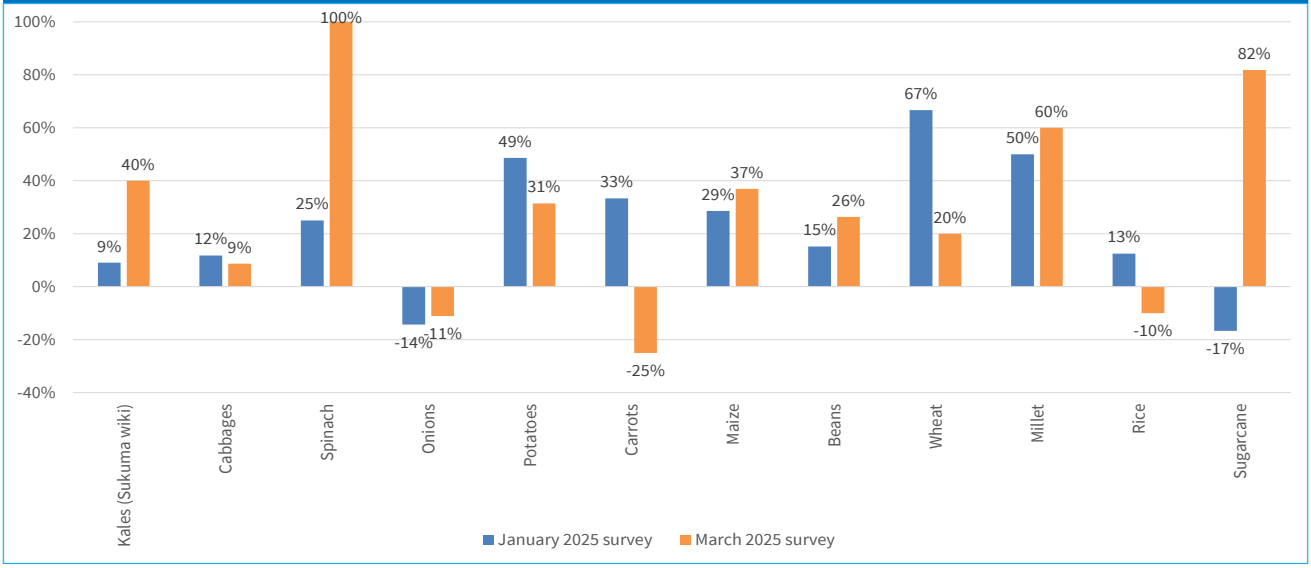
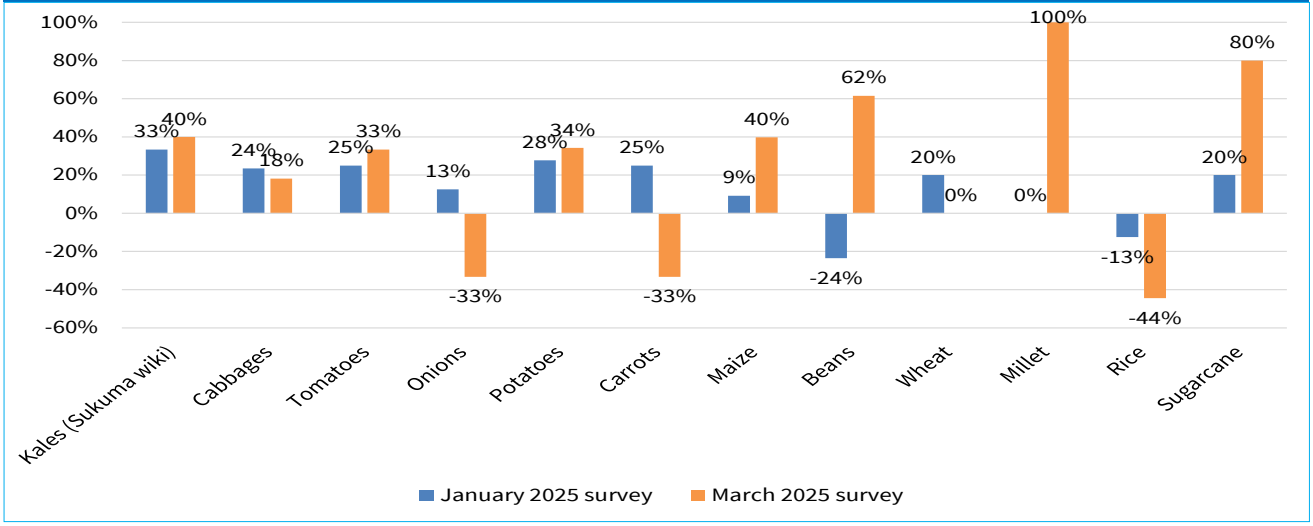


Figure 7(b): Balance of opinion on expected change in output for select crops (Percent of respondents)



3.5 Expected performance of the agriculture sector and the overall economy

Respondents were asked to state their expectations with regard to the performance of the agriculture sector in three months as well as one year ahead. That is, whether the expectations for the sector's performance are to remain unchanged, to improve or to worsen. Analysis of March 2025 survey response data reveals that 83 percent of the sampled farmers expect the performance of the agriculture sector to improve in the next three months. The level of optimism remained high and increased further in March compared to that of January at 75 percent **(Figure 8a).**

The increased optimism in March 2025 was informed by the high expectations of favourable rainfall outlook and government interventions. Given that March – May is a long rains season, farmers expect the sector to perform better as a result of the rains. The optimism was also partly underpinned by the robust performance of agriculture sector in 2023 and 2024 supported by favourable rainfall outcomes, the application of smart agriculture farming methods and the expected continuation of government initiatives, especially measures aimed at reducing farm input costs such as the provision of subsidized fertilizer.

Additionally, the survey sought respondents' views on their expectations about the overall performance of the economy, in terms of GDP growth prospects in the next three months and one year ahead. Results in March 2025 indicated that optimism remained high with 70 percent of the sampled respondents expecting an improvement in the overall economic performance in the next three months. This is an improvement from 59 percent in January 2025. Similarly, optimism about expected economic performance one year ahead remained high at 67 percent, which is an improvement from 58 percent in January 2025 **(Figure 8b).** The increase in optimism was largely on account of the positive expectations about the performance of the agriculture sector.

Figure 8(a): Proportion of sampled respondents optimistic about agriculture sector performance (Percent)

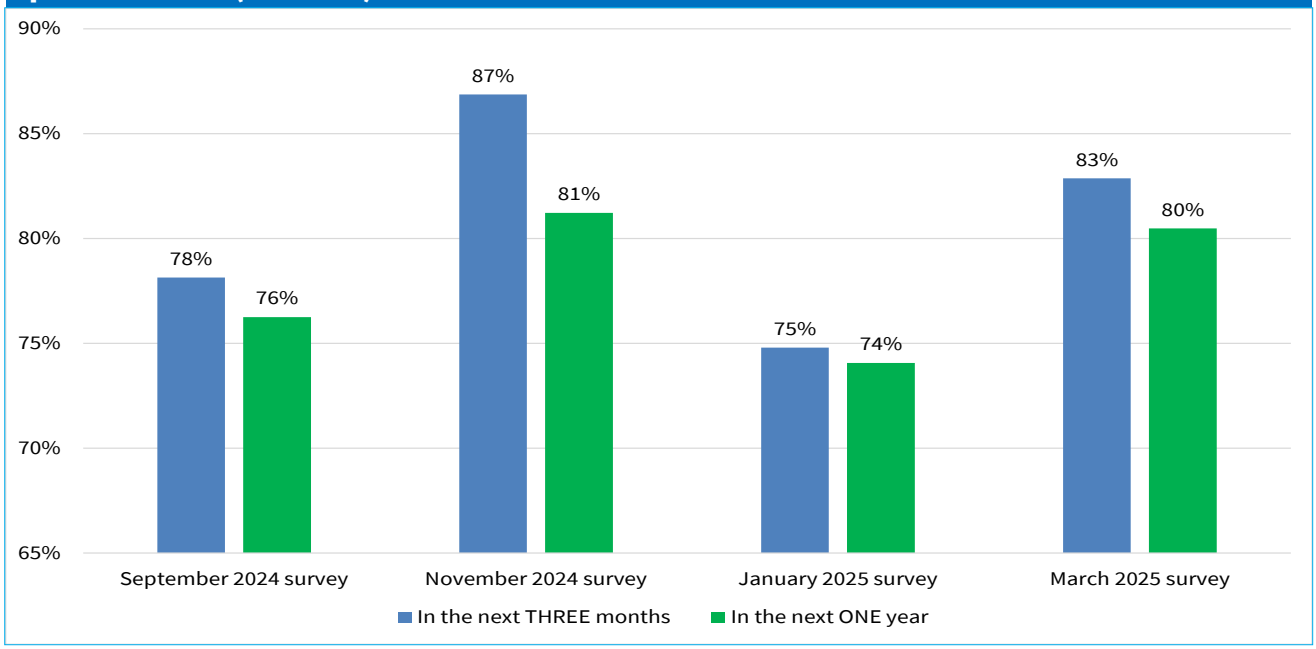
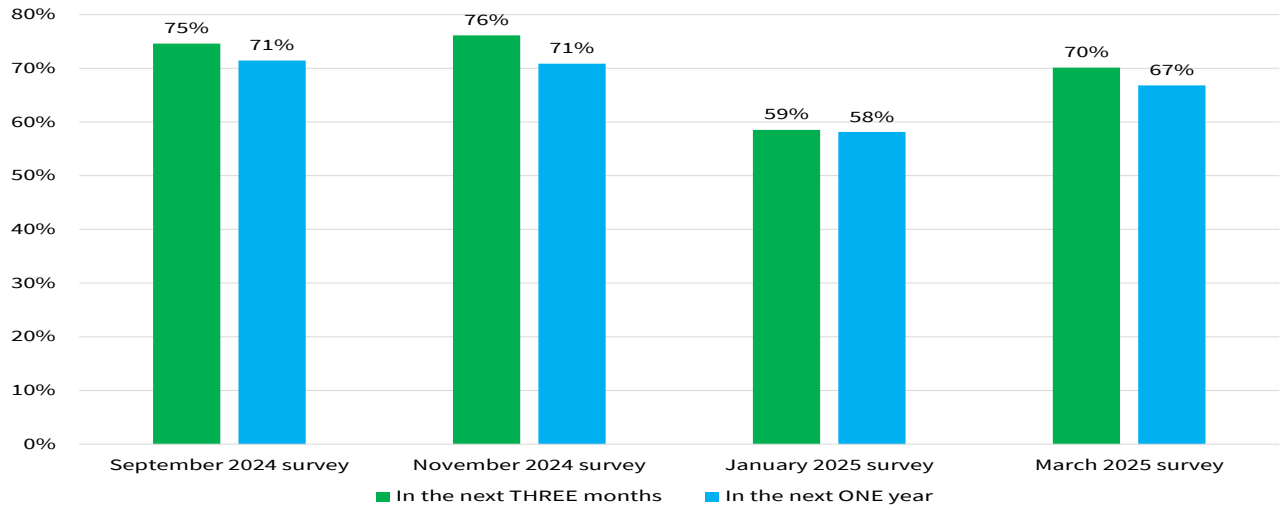


Figure 8(b): Optimism about GDP growth prospects (Percent of respondents)

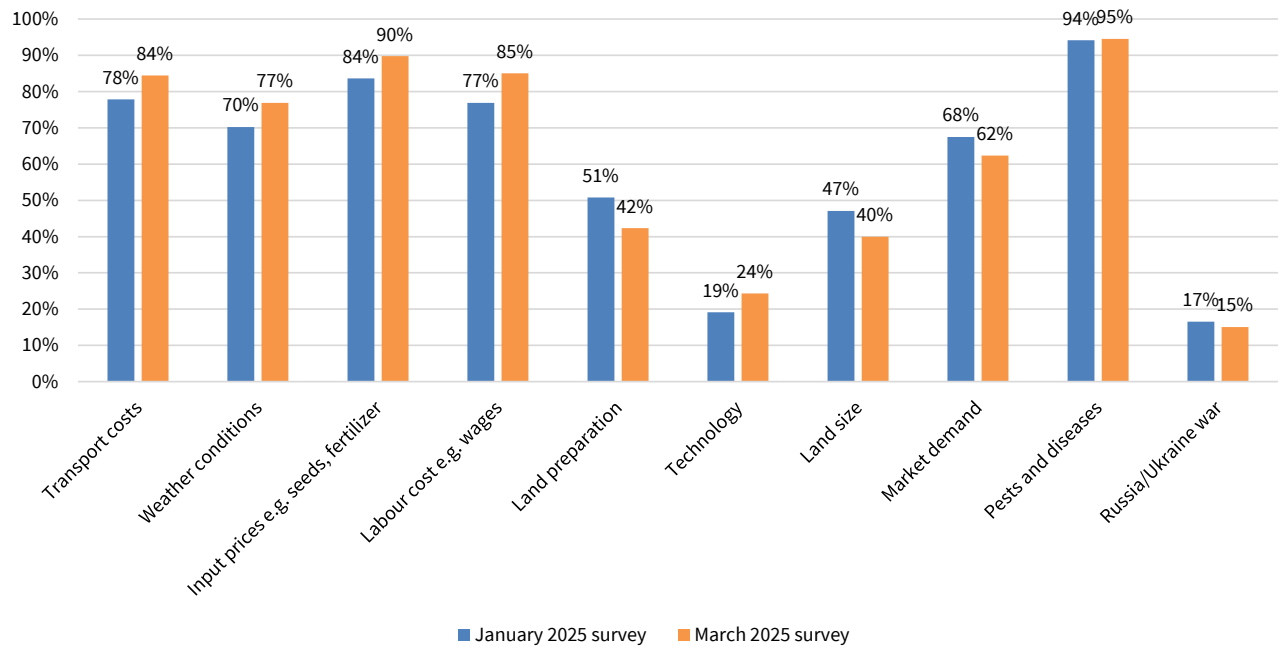


3.6 Factors affecting agricultural production

Pests and diseases remain the major factor affecting agricultural production. In March 2025, the proportion of farmers who reported pests and diseases to be the topmost factor affecting their agricultural output increased marginally to 95 percent from 94 percent in January 2025. High cost of inputs was the second most cited factor, with the proportion of respondents whose agricultural output was affected by high cost of inputs increasing to 90 percent in March 2025 from 84 percent January 2025 **(Figure 9).** The inputs include seeds, fertilizer and pesticides/herbicides.

Just like in the previous survey, farmers indicated that over time, prices of certified hybrid seeds have increased. This has compelled them to either reduce the quantity of certified high-quality seeds purchased, utilize their own seeds, or buy low quality seeds. However, to ease the burden of input costs, the government launched the subsidized fertilizer program in 2022. This programme has since benefitted more than 60 percent of the sampled farmers. Other key factors affecting agricultural production include labour costs, transport costs, weather conditions, market demand, land preparation and land size.

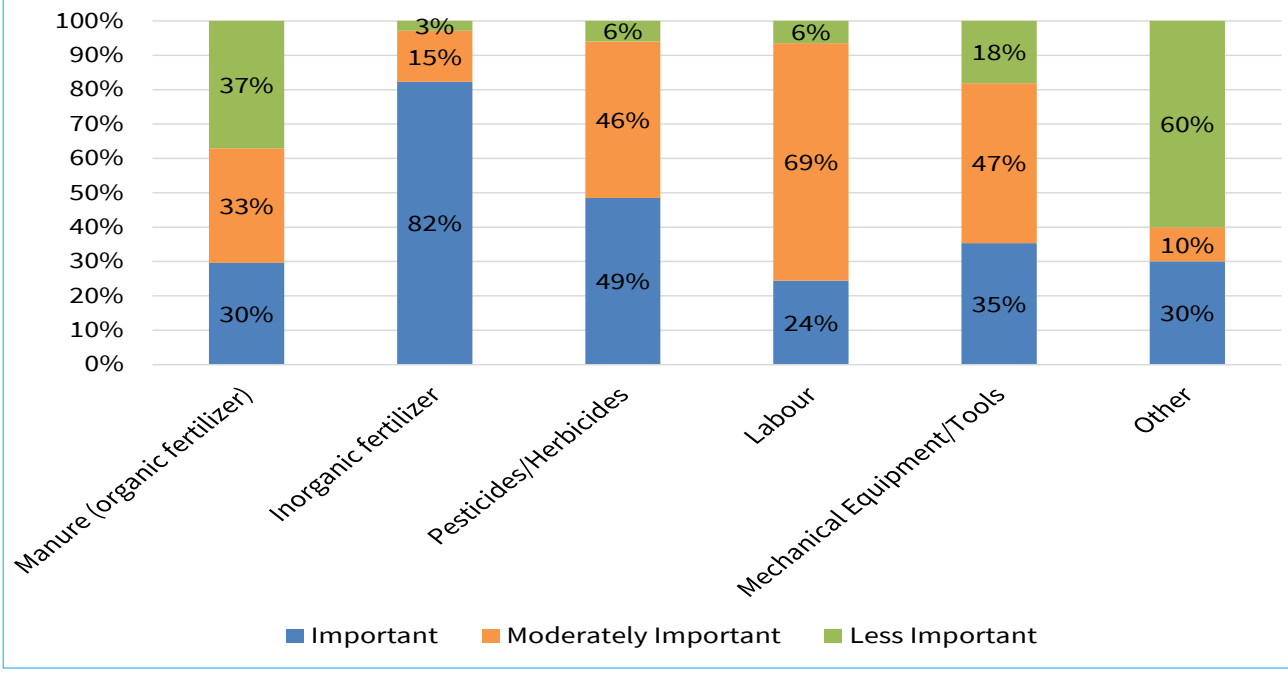
Figure 9: Factors affecting agricultural production (Percent of respondents)



3.7 Use of farm inputs in agricultural production

The survey results show that the most important inputs are inorganic fertilizer, pesticides, herbicides and labor **(Figure 10)**. Results show that nearly half of respondents rank inorganic fertilizer as "important", highlighting its critical role in driving agricultural productivity. This reflects the centrality of Government effort to boost productivity through subsidized fertilizer. Additionally, pesticides/ herbicides also stand out as important inputs, suggesting that farmers consider them as key enablers to increased production. Mechanical equipment and labor were also identified as important inputs into crop production.

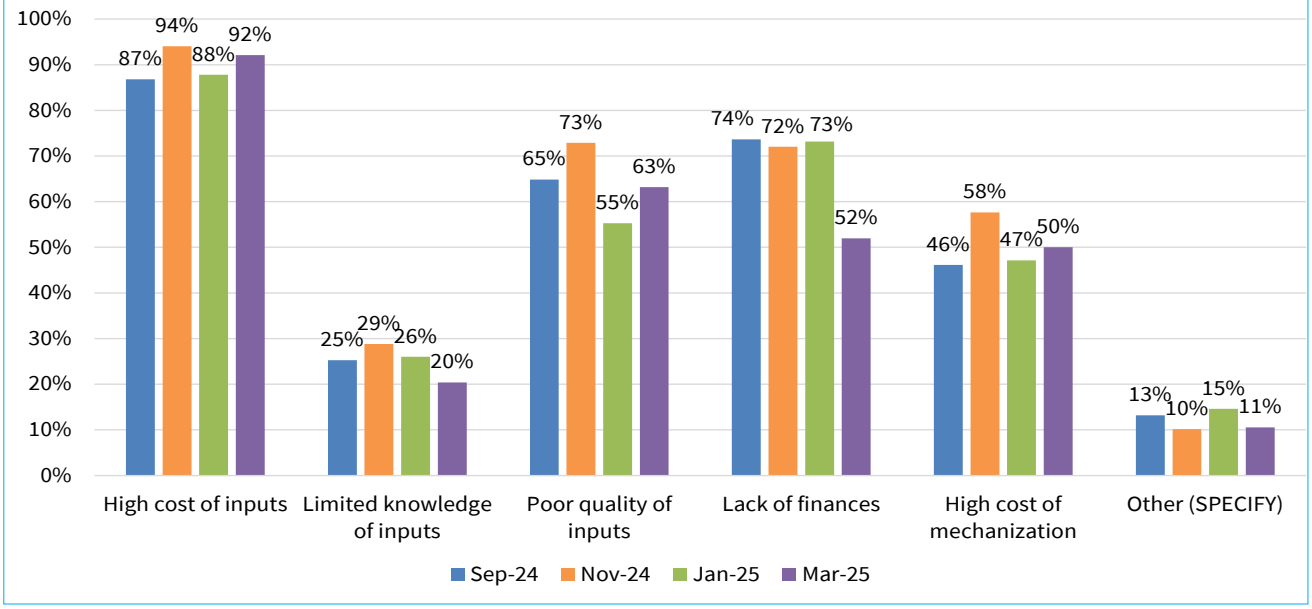
Figure 10: Significance of farm inputs in agricultural production (Percent of respondents)



3.7.1 Challenges associated with access to farm inputs

Analysis of factors constraining access to inputs show that affordability remains the most pressing issue while financial constraints and input quality concerns are easing, likely reflecting evolving market conditions and policy interventions. High cost of inputs remains the dominant constraint, with the proportion of farmers citing it as a challenge having increased from 87 percent in September 2024 to 92 percent in March 2025 **(Figure 11).** Concerns around access to finances as a barrier eased from 74 percent in September to 52 percent in March, possibly reflecting declining lending rates in line with easing monetary policy. Concerns regarding the quality of inputs declined to 63 percent in March 2025 from 73 percent in November 2024 suggesting that efforts by Government to ensure access to quality inputs especially around the planting period during the long rains season are starting to bear fruits. Mechanization cost concerns also eased from 58 percent in November to 50 percent in March, while limited knowledge of inputs has become a lesser concern, from 29 percent in November to 20 percent in March.

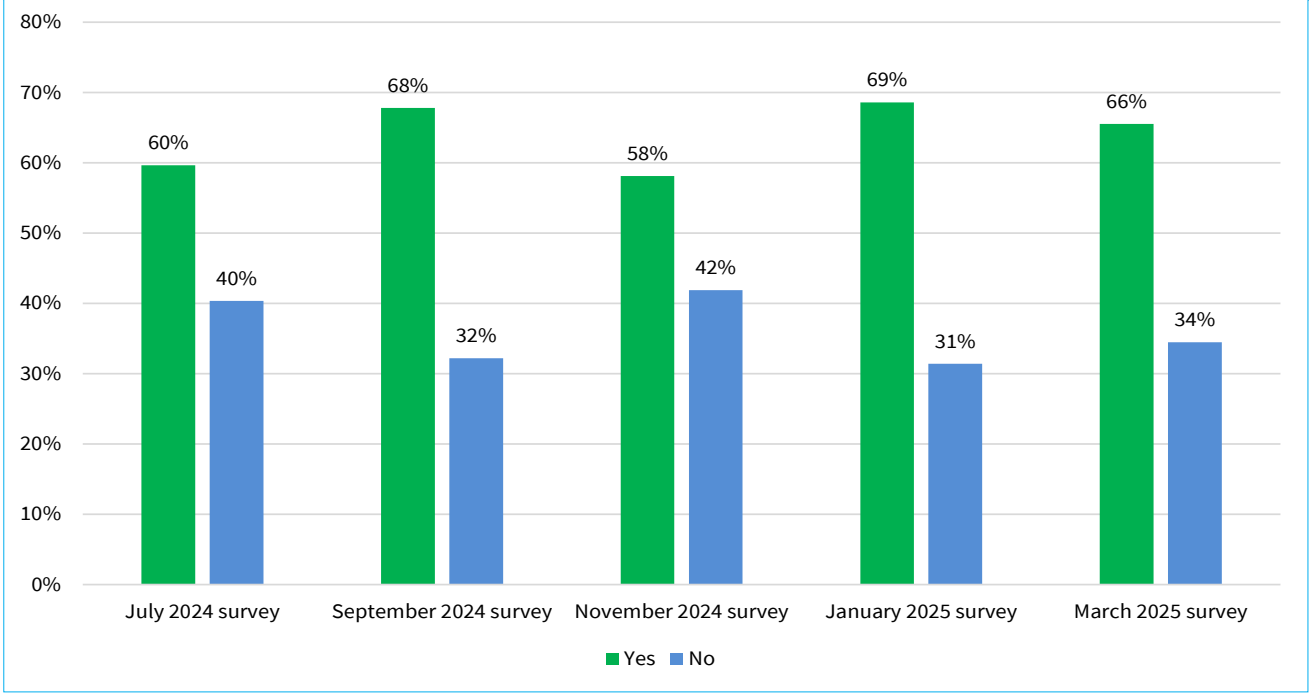
Figure 11: Factors limiting access to farm inputs (Percent of respondents)



3.7.2 Access to Government subsidized fertilizer

The survey results show that access to Government-subsidized fertilizer peaked in January at 69 percent of the sampled farmers and remained high in March at 66 percent ahead of the long rains planting season **(Figure 12).** Additionally, the proportion of farmers reporting no access remained low at 34 percent in March 2025 compared to 42 percent in November 2024. This marks a continued trend of improved access, with January-March 2025 levels still higher than the September-November 2024 levels.

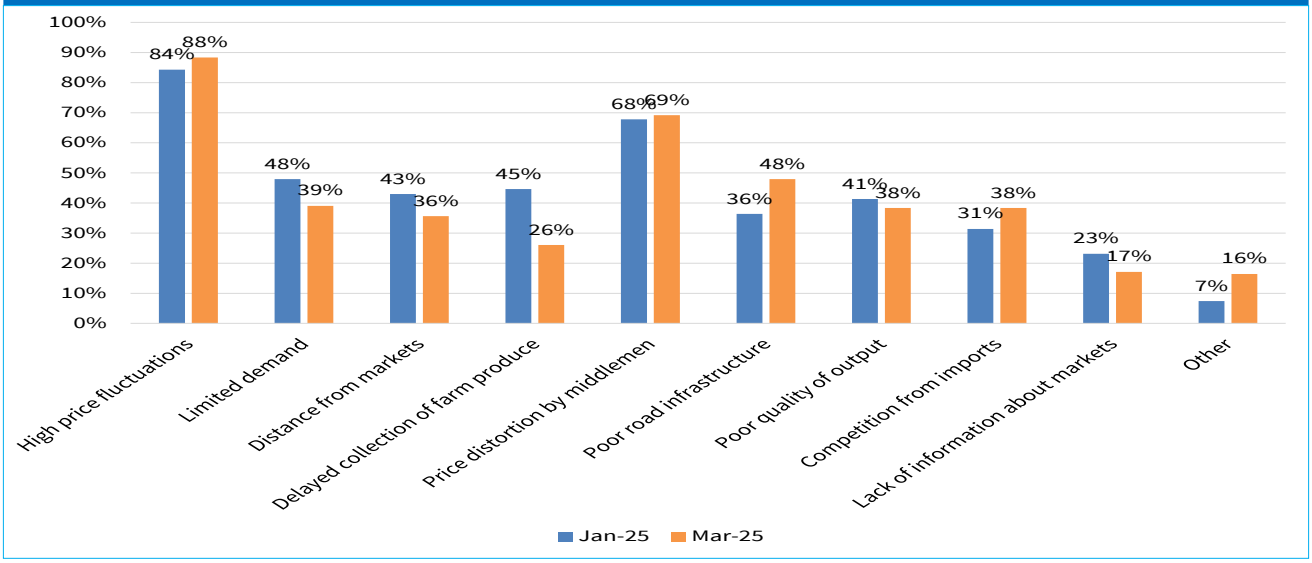
Figure 12: Access to subsidized fertilizer (Percent of respondents)



3.8 Factors affecting marketing/sale of farm produce

The main factors inhibiting marketing and sale of farm produce are price fluctuations and interference by middlemen/brokers. The proportion of sampled farmers citing challenges of price fluctuations remained elevated above 80 percent while that for price interference by middlemen/brokers remained high at 69 percent **(Figure 13).** Demand for farm produce seems to have picked up in recent months with 39 percent of sampled farmers citing it as a concern in the March survey compared to 48 percent in January 2025. Other key factors affecting marketing of farm produce include poor road infrastructure, distance to markets and competition from imports.

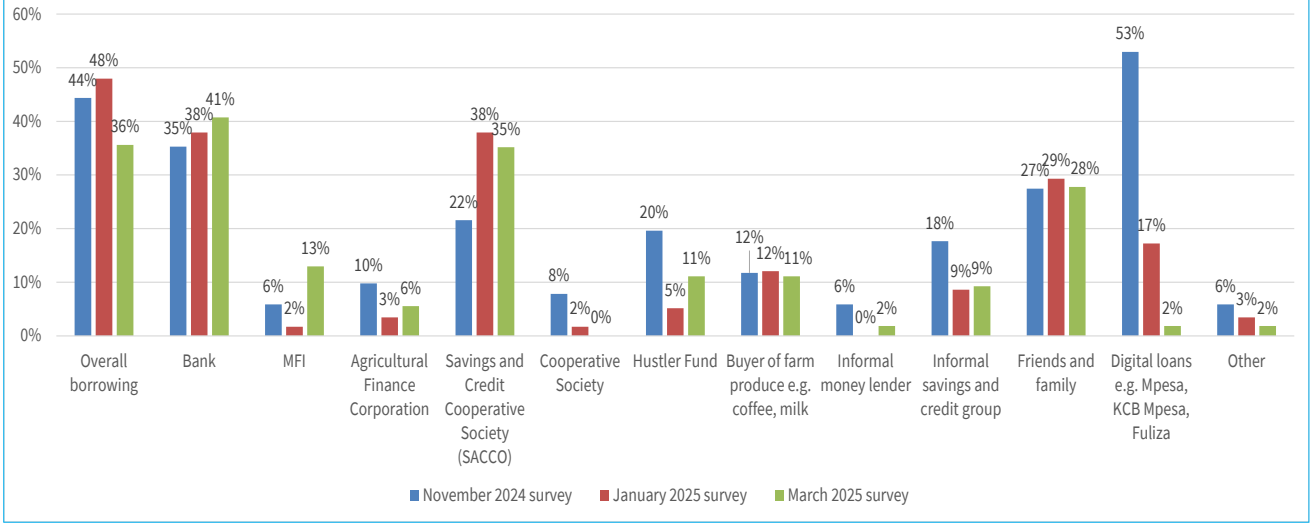
Figure 13: Factors affecting marketing/sale of farm produce (Percent of respondents)



3.9 Access to credit facilities in agriculture

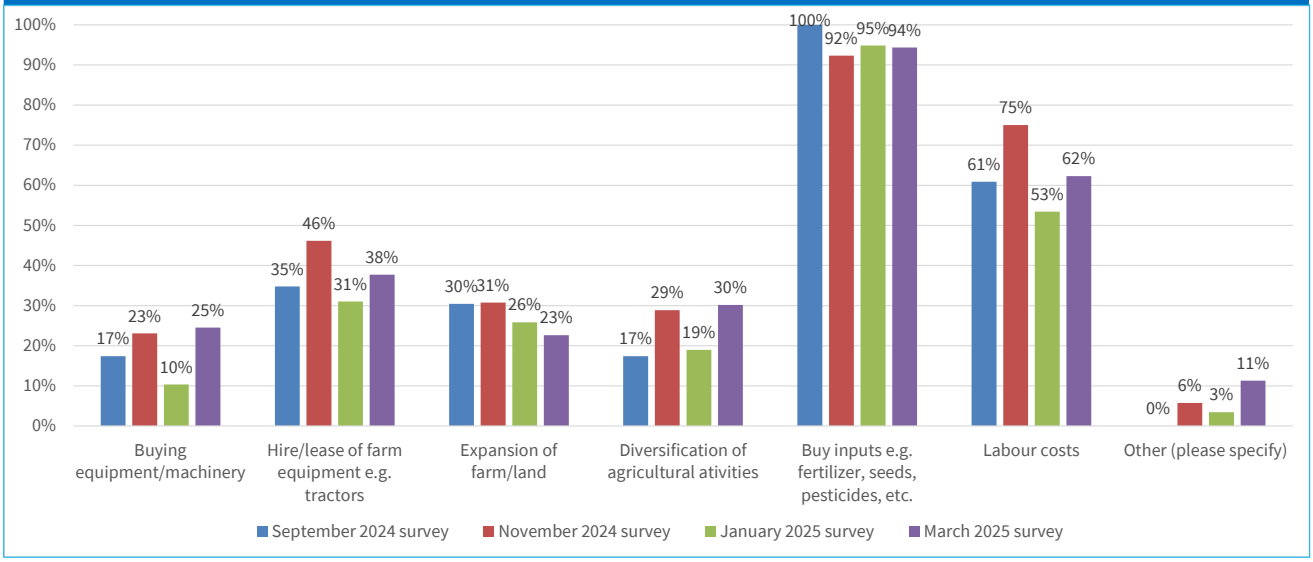
The main sources of credit to farmers are banks, Savings and Credit Cooperatives (SACCOs), family and friends, buyers of farm produce and digital credit providers **(Figure 14).** The proportion of sampled farmers accessing credit declined to 36 percent in March from 48 percent in January 2025 largely reflecting fewer farmers accessing credit through non-bank credit providers. The decline could also reflect a seasonal element as some farmers may prefer to borrow much earlier (January) rather than wait until the start of the rain season (March).

Figure 14: Proportion of respondents who borrowed to finance farming by lender (Percent of respondents)



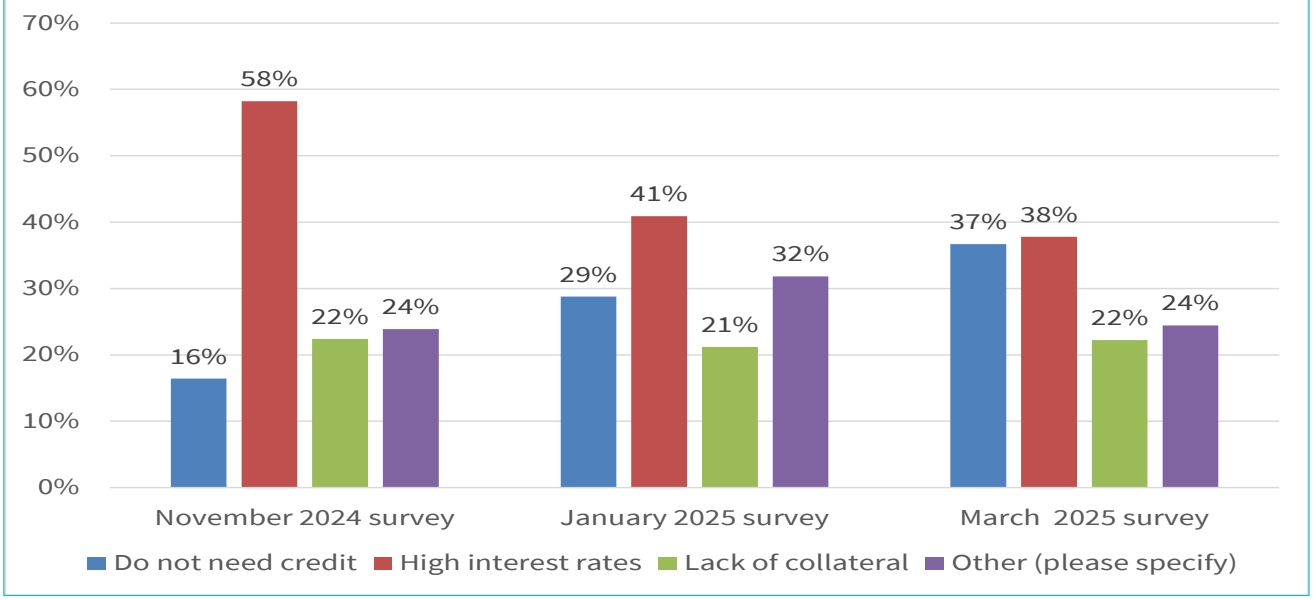
Trends on utilisation of credit for various activities undertaken by farmers remained largely unchanged across the surveys. Results show that farmers typically utilize credit to purchase farm inputs, meet labor costs and hire/lease farm equipment **(Figure 15).** Use of credit to purchase equipment and expansion/ diversification of farming activities rank lower.

Figure 15: Purpose of agricultural loans (Percent of respondents)



The March 2025 survey indicates that high interest rates remain the primary barrier to credit access for farmers, though the proportion of farmers citing it decreased to 38 percent from 41 percent in January 2025 and 58 percent in November 2024 **(Figure 16).** The moderation could be attributed to the declining lending rates in line with the easing monetary policy stance. Lack of collateral as a constraint to credit access remained stable at 22 percent in March relative to 21 percent in January survey. The proportion of sampled farmers who reported that they do not need credit was relatively higher at 37 percent in March compared to 29 percent in January.

Figure 16: Barriers to credit among farmers (Percent of respondents)



4. VIEWS ON HOW TO IMPROVE THE AGRICULTURE SECTOR

Like previous surveys, the March 2025 survey sought views from the respondents on what should be done to improve agricultural production and ensure a continuous market supply of agricultural produce. In particular, the survey sought their views and suggestions on interventions required to increase production. The suggestions gathered in March 2025 survey are very similar to those gathered in previous surveys:

- There is a need to increase the area under irrigation by constructing more dams, digging boreholes and water pans. This will reduce reliance on rainfed agriculture and ensure a smooth supply of agricultural commodities. It will also reduce reliance on imports of agricultural commodities.
- The government should ensure that farmers have access to affordable inputs of high quality and timely delivery of inputs. The subsidized fertilizer programme should continue as it has alleviated the farm input cost burden
- It is important to stabilize prices of agricultural produce which tend to be highly volatile, falling during harvests and increasing during shortages, occasioned by factors such as drought, floods or crop diseases.
- Promote mechanization of agriculture, for instance, subsidize tractor services during farm preparation phase, to increase yields. It is crucially important to increase availability of tractors for hire to reduce farm tractor hiring charges.
- Provide extension services, especially agronomists to advise farmers on appropriate farming techniques.
- Improve feeder roads to enhance delivery of agricultural produce to markets. This is particularly important as some feeder roads tend to be impassable during rain season.
- Increase facilities for maize drying and ensure they are closer to farmers, to reduce post-harvest losses.

5. CONCLUSION AND POLICY RECOMMENDATIONS

This Agriculture Sector Survey report summarizes findings from the survey conducted from March 10 - 14, 2025. The main objective of the survey was to obtain indicative information on recent trends and market expectations of prices and output of key agricultural commodities for the purpose of informing monetary policy.

As is with previous surveys, the survey focused on prices of key agricultural commodities in select retail and wholesale markets, indicative agricultural output and acreage as well as output expectations from sampled farms, factors affecting agricultural production, marketing and sale of farm produce, access to farm inputs and credit facilities as well as proposals on how to improve agricultural production. The survey drew 312 respondents from wholesale traders, retailers, and farmers in select towns across the country (Nairobi Metropolitan area, and neighbouring counties including Kiambu, Kajiado and Machakos, Naivasha area, Gilgil Nakuru, Narok, Bomet, Kericho Kisumu, Mombasa, Kisii, Eldoret, Kitale, Nyandarua, Nyahururu, Mwea, Machakos, Isebania, Meru, Nyeri, Isiolo, Oloitoktok, Namanga, Makueni, Molo, Kakamega and Bungoma).

The key findings from the March 2025 Survey include the following:

- Prices of sampled commodities showed mixed outcomes in March 2025, largely reflecting seasonal factors. Most respondents expect infaltion to decline or remain the same in the next 3 months.
- The proportion of respondents reporting weather conditions (drought, floods) as a key driver of retail prices declined in March 2025 relative to January 2025, largely reflecting improved weather conditions.
- The uptake of subsidized fertilizer by sampled farmers was over 60 percent, consistent with previous surveys.
- In general, most farmers expect an increase in both output and acreage, in general.
- A larger proportion of respondents expect the performance of the agriculture sector to be much better both three months and one year head. The optimism is mainly driven by the favourable long rain season outlook and expected continuation of government measures particularly subsidised fertiliser.
- Optimism about the expected performance of the economy in the next three months as well as one year ahead improved in March 2025 compared to January 2025, mainly driven by expected

improved performance of the agriculture sector.

Regarding views on how agricultural production could be improved, the responses were similar to those of previous surveys. Suggestions included the need to preserve water through construction of dams and water pans; address the high cost of inputs and create a mechanism to stabilise prices of agricultural commodities, which are characterised by fluctuations from time to time.

There are several measures the Kenya government can take to ensure that farmers are incentivised to increase production. Based on the findings of this survey, the key policy recommendations mirror those contained in previous reports of the Agriculture Sector Surveys:

They include the following:

- Promote irrigation to reduce reliance on rain-fed agriculture which is risky due to changing weather patterns.
- Ensure farm inputs are affordable, of high quality and are available on time. The government subsidised fertilizer programme should be sustained as it has moderated input cost burden. The findings of the March 2025 survey, like previous survey findings, showed that inorganic fertiliser was the most commonly used input with 82 percent of sampled farmers having reported its usage.
- The government should consider implementing measures to reduce the cost of pesticides/ herbicides as this is the second most used input after inorganic fertiliser.
- Increase the number of fertilizer collection centres and have them closer to farmers to reduce the costs that farmers incur travelling to collect fertilizer.
- There is need to promote mechanization of agriculture by providing incentives such as subsidised tractor services especially during land preparation.
- Promote price stability of agricultural produce to reduce losses to farmers. For instance, government should consider allocating more funds to National Cereals and Produce Board (NCPB) to purchase cereals such as maize during periods of excess supply.
- Bring essential services closer to farmers, for instance, maize drying services to reduce post-harvest losses.
- Prioritize construction of feeder roads to ensure agricultural produce reaches the market easily. This will also reduce post-harvest losses.
- Reduce the compliance cost especially for horticultural farmers who must meet stringent requirements for their produce to be exported.

Figure 17: Factors affecting wholesale prices (Percent of respondents)

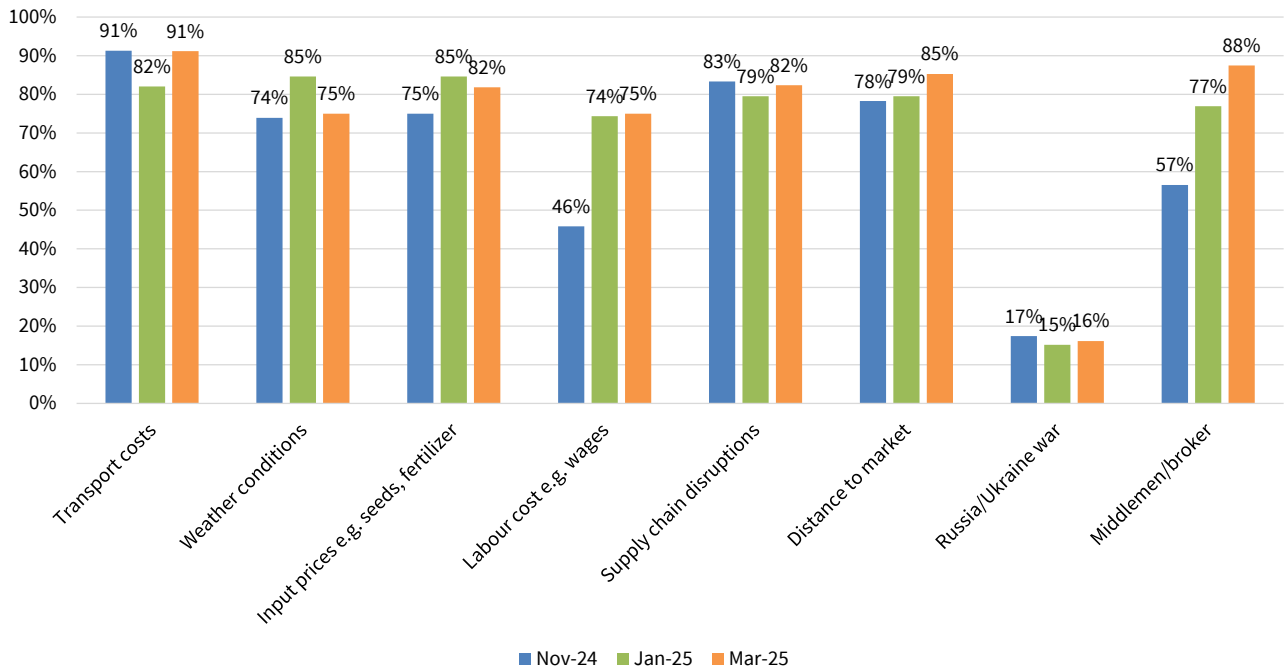
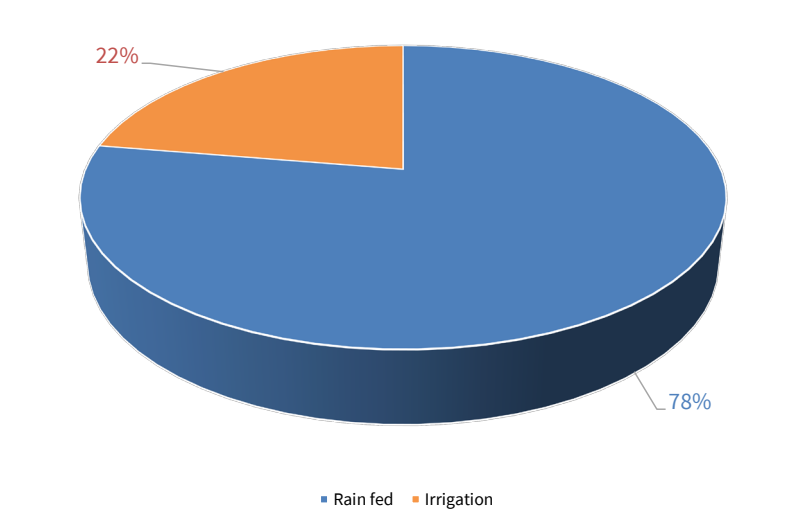


Figure 18: Main water source for farming in January 2025 (Percent of respondents)



Central Bank of Kenya

Haile Selassie Avenue P.O. Box 60000 - 00200 Nairobi |Tel: (+254) 20 - 286 0000 / 286 1000 / 286 3000