



Agriculture Outlook for July, 2025

With Average Retail Market Price Performances of Selected Commodities

BACKGROUND:

Agriculture remains the backbone of Uganda's economy, contributing approximately 24 percent to GDP in the 2024/25 fiscal year and employing around 70 percent of the workforce, underscoring its critical role in livelihoods and economic stability (Ministry of Finance, Planning and Economic Development, 2025; Uganda Bureau of Statistics [UBOS], 2025). The sector sustains 61 percent of households through crop production and 37 percent via livestock farming, with subsistence production comprising the majority of agricultural activity (Development Policy and Performance Portal, 2025). Yet, challenges such as limited mechanisation, poor post-harvest facilities, and inadequate irrigation infrastructure hinder full productivity (International Trade Administration, 2023). Uganda encompasses 241,559 km² of land, 80 percent of which is classified as arable, though only 35 percent of this potential is currently cultivated, indicating significant scope for expansion (International Trade Administration, 2023). The agricultural market was valued at USD 4.07 billion in 2023 and is projected to grow to USD 6.21 billion by 2031 at a compound annual growth rate of 4.2 percent (Mordor Intelligence, 2024). Export performance has been especially strong: coffee export earnings more than doubled to USD 167.68 million in February 2025, compared to USD 82.56 million the previous year, while cocoa export receipts rose by 164.4 percent to USD 68.7 million (Bank of Uganda, 2025). Despite this success, policy implementation gaps and undervaluation of the agricultural budget persist, limiting transformation of the sector's potential (AGRA Uganda, 2020; Parliament of Uganda, 2025).

July 2025 Performance

● Weather Conditions

Uganda's rainfall distribution follows two primary patterns. The bimodal rainfall pattern covers most of the country, including the Central, Western, Eastern, and parts of the West Nile regions. In these areas, July 2025 marked the peak of the dry season, with most districts experiencing minimal rainfall. This facilitated the completion of first-season harvests. However, isolated parts of Bunyoro, such as Hoima and Masindi, received early rains towards the end of the month, which enabled some farmers to begin early land preparation for the second season (Ministry of Water and Environment, 2025).

The unimodal rainfall pattern is found only in the north-eastern region, including Karamoja subregion. Planting in this area largely took place in May 2025, following the onset of rains in April. Rainfall in July was consistent, maintaining adequate soil moisture for crops such as sorghum, millet, groundnuts, beans, and green maize. According to official data, Kotido recorded 145 mm of rainfall spread over 15 days in July, while Moroto registered 138 mm over 14 days (UBC, 2025).

West Nile, which follows the bimodal pattern, remained largely dry in July, with occasional light showers in districts such as Arua and Yumbe. The Eastern region showed mixed conditions. Districts in the Mount Elgon highlands experienced occasional rainfall, while the lowland areas remained dry, supporting grain drying activities. Southwestern areas, including parts of the cattle corridor such as Sembabule and Kiruhura, saw declining pasture and water sources, a trend typical of this period.

● Crop Performance

In bimodal regions, including Central Uganda, Western Uganda, Eastern Uganda, and West Nile, July marked the end of first-season harvesting. Key crops harvested included maize, beans, groundnuts, cowpeas, and bananas. Farmers in these areas shifted focus to land preparation for the second season, expected to start with the September to December rains. In Bunyoro, early end-of-July showers allowed a few farmers to begin second-season planting. Yields for maize in Central and Western Uganda averaged between 1.5 and 2.0 metric tonnes per hectare, while beans averaged 0.8 to 1.2 metric tonnes per hectare (FAO, 2025).

In the unimodal north-eastern Karamoja region, crops planted in May were in the vegetative to early reproductive stages. Sorghum and millet showed good tillering and ear formation, while beans and green maize were progressing well towards August harvest. Field reports indicate that average crop stand densities in Kotido and Moroto were above 85 percent, suggesting favourable yield potential if rainfall continues as forecast.

● Livestock Production

In bimodal cattle-keeping areas such as the central cattle corridor (Luwero, Sembabule, Kiruhura) and parts of Western Uganda, July's dry conditions led to declining pasture availability and reduced water levels in valley tanks and dams. Milk yields dropped by an estimated 10 to 15 percent compared to June 2025 levels (FAO, 2025). In contrast, lives-

tock in the unimodal north-east benefited from adequate grazing and water availability. Karamoja's pasture condition index remained above 70 percent, supporting stable livestock body condition scores.

In West Nile, particularly Arua and Koboko, livestock farmers relied on crop residues from harvested fields to supplement feed. In the Eastern highland areas such as Kapchorwa, pastures remained greener due to occasional rainfall, benefiting both dairy and beef production.

● Market Prices

Market conditions in July reflected the interplay between the end of the harvest in bimodal areas and the ongoing cropping season in unimodal regions. Wholesale maize grain prices in Kampala averaged UGX 1,300 per kilogram, while farmgate prices in production districts such as Mubende averaged UGX 1,000 per kilogram. Beans (Nambaale variety) retailed at UGX 5,200 per kilogram in Kampala, with farmgate prices in Mbarara averaging UGX 4,000.

The coffee sector experienced a notable decline in farmgate prices for Robusta coffee. In July 2025, farmgate prices for dry cherry (Kiboko) fell to as low as UGX 9,000 per kilogram in some districts, down from UGX 12,000 to UGX 13,000 in May. This was attributed to peak harvest inflows in the bimodal coffee-growing regions such as Central Uganda (Luwero, Mukono), Western Uganda (Hoima, Kibaale), and parts of Eastern Uganda (Kamuli, Iganga), combined with subdued global demand (International Coffee Organization [ICO], 2025). The processing chain for Robusta typically follows the stages of cherry (fresh) to Kiboko (dry cherry), then to FAQ (Fair Average Quality hulled green bean), then to screened and graded green coffee, and finally to export. Low prices at the Kiboko stage have direct implications for incomes across this chain.

● Food Security

According to the Integrated Food Security Phase Classification (IPC, 2025), approximately 797,000 people remained in Crisis (Phase 3) or worse, with the largest concentrations in refugee-hosting districts such as Yumbe, Adjumani, and Kiryandongo. Karamoja, despite favourable crop performance, remained an area of concern due to high market dependence before harvest, especially in districts like Moroto where over 60 percent of households relied on purchased food in July (FAO & WFP, 2025). Funding shortfalls in humanitarian assistance continued to limit ration distributions, leaving vulnerable populations at risk of food consumption gaps.



Average Farmgate/Wholesale and Retail market prices of selected commodities for July 2025

Commodity	Kampala		Mbarara		Mubende		Arua	
	WSP	RP	FGP	RP	FGP	RP	FGP	RP
Beans Nambaale	4,600	5,000	4,000	4,200	4,200	4,400	3,800	4,200
Beans Yellow	4,700	5,200	4,000	4,400	4,200	4,400	3,800	4,200
Maize grain	1,300	1,500	900	1,100	1,000	1,100	700	950
Millet	4,500	5,000	4,300	4,700	4,300	4,700	3,700	4,200
Groundnuts	5,700	6,000	5,200	5,500	5,200	5,500	5,000	5,00
Cow peas	5,200	6,000	5,400	6,000	5,400	5,800	4,600	5,400
Rice (Super)	4,100	4,600	3,800	4,200	4,000	4,200	3,600	4,100
Bananas (Medium)	32,000	36,000	21,000	29,000	25,000	31,000	23,000	29,000
Fresh cassava	1,100	1,500	1,000	1,300	1,050	1,300	950	1,050
Irish potato	1,700	2,100	1,400	1,800	1,500	1,900	1,300	1,700
Sweet potato	1,450	1,850	1,100	1,500	1,000	1,200	800	1,000
Fresh milk/litre	1,700	2,100	1,100	1,500	1,500	1,700	1,400	1,700
Coffee Clean (Robusta)	13,500	—	12,500	—	12,500	—	—	11,500
Beef (Kg)	15,500	18,000	—	16,000	—	16,000	—	15,000
Goat Meat (Kg)	18,500	22,000	—	18,000	—	18,000	—	18,000

WSP = Wholesale Price, **FGP** = Farm Gate Price, **RP** = Retail Price

Projected Outlook - August 2025

● Bimodal Areas:

Second-season rains are expected to commence in the last week of August in most Central, Western, Eastern, and West Nile districts, with early showers anticipated by mid-August in parts of Bunyoro such as Hoima, Masindi, and Kibaale (Ministry of Water and Environment, 2025). These early rains will support the timely planting of beans, maize, groundnuts, and vegetables. In the Eastern highlands of Kapchorwa, earlier rainfall may give Irish potato and vegetable growers a head start on planting. From a marketing perspective, maize and bean prices in surplus-producing districts may remain stable, while urban retail prices could edge upward until fresh harvests arrive in late October. Farmers should complete land preparation early, acquire quality seed, and stagger planting dates to mitigate risks from erratic rainfall.

● Unimodal Areas:

In Karamoja subregion, August rainfall will continue to sustain the growth of long-cycle crops such as sorghum and millet, while short-cycle crops like beans and groundnuts will near harvest readiness. These harvests are expected to ease household market dependence and improve dietary diversity from late August into September. Market inflows of early-harvested groundnuts and beans from Karamoja may temporarily stabilise prices in regional markets, particularly in northern Uganda. Farmers should prioritise timely weeding, pest monitoring, and preparation for harvesting and proper post-harvest handling to maintain quality and secure better prices.

● Livestock:

In the cattle corridor districts of Sembabule, Kiruhura, Lyantonde, and parts of Isingiro, pasture and water stress is expected to persist into the first half of August, keeping milk yields below seasonal averages. The onset of rains later in the month will initiate pasture regeneration and begin to improve milk production, though notable recovery will be seen in September. Livestock markets may see stable or slightly higher prices as animals in unimodal areas maintain good body condition. Livestock keepers should continue supplementing feed and water, plan for breeding to coincide with feed abundance, and prepare to restock or market animals strategically as pasture improves.

CONCLUSION:

July 2025 reinforced the seasonal dry pattern in most bimodal regions while unimodal Karamoja enjoyed favourable growing conditions. Harvest completion in the bimodal areas gave way to land preparation, with early rains in Bunyoro prompting limited planting. Coffee producers faced some of the lowest Kiboko prices in recent years, placing pressure on household incomes in key coffee-growing districts. Food security concerns persisted in refugee-hosting and chronically vulnerable areas, requiring continued support.

RECOMMENDATIONS:

General Recommendations:

1. District local governments in coordination with MAAIF should ensure early land preparation support and distribution of quality seeds and inputs in bimodal regions before the onset of second-season rains.
2. Farmer cooperatives and produce traders should invest in appropriate storage facilities, including hermetic bags and improved granaries, to reduce post-harvest losses and maintain quality of first-season produce.
3. Livestock extension services and water user committees should maintain water points and promote fodder conservation in cattle corridor districts to sustain livestock productivity until pasture regenerates.

Advocacy Recommendations:

1. Farmer associations and cooperatives should advocate for a minimum farmgate price for Robusta Kiboko to protect smallholder coffee farmers from sharp price drops during peak harvest.
2. CBOs and local CSOs should lobby district authorities for rural road maintenance to lower transport costs and improve farmer access to markets.
3. CSOs working with livestock keepers should campaign for the establishment of district-level fodder banks and water harvesting facilities in drought-prone cattle corridor areas.

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About Advocacy Coalition for Sustainable Agriculture (ACSA)

ACSA is a legally registered national network of Civil Society Organisations (CSOs) which works with smallholder farmers to promote sustainable agriculture, agricultural market development, and environmental conservation and undertakes research and advocacy. ACSA has membership of 29 CSOs spread country wide in 46 districts with Mission “to Empower civil society organizations (both church and non-church actors) working with smallholder farmers to advocate for favorable agrarian policy environment for sustainable communities” and a Vision of “Smallholder farmers living in a Sustainable Environment”. ACSA’s focus areas are; Advocacy and Lobbying, Research and documentation, Capacity building of member organizations, Capacity building of ACSA secretariat, Networking and partnership Building, which are undertaken under the overall Goal of: **“Relevant agriculture policies and services for Small Holder Farmers (SHFs) are implemented to foster profitable sustainable agriculture enterprises”**.

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