



Agriculture Outlook for June, 2025

With Average Retail Market Price Performances of Selected Commodities

BACKGROUND:

Agriculture is a foundation of Uganda's economic performance and rural livelihoods, contributing roughly a quarter of the national GDP and employing close to 80% of the population, either directly or indirectly (Uganda Bureau of Statistics [UBOS], 2025a; Food and Agriculture Organization [FAO], 2024). The sector not only ensures national food security but also drives export earnings, with commodities such as coffee, fish, and dairy forming a significant share of foreign exchange inflows (MoFPED, 2025).

Smallholder farmers, most cultivating less than five hectares, dominate agricultural production, supplying the bulk of staple foods consumed locally and feeding regional trade flows (FAO, 2024). Their productivity is essential for poverty reduction, rural employment, and environmental stewardship. However, smallholder farming systems remain vulnerable to climatic variability, market volatility, and structural constraints such as limited extension support and inadequate post-harvest infrastructure. Producing a monthly agriculture outlook provides a timely evidence base to inform farmer decisions, guide policy interventions, and support the work of stakeholders in agricultural value chains by tracking market trends, climatic patterns, and production conditions.

June 2025 Performance

● Weather Conditions

In most bimodal areas, rainfall slowed towards the end of June, creating favourable conditions for post-harvest activities such as drying beans, maize, and other produce. This reduction in precipitation followed a generally wet start to the season, allowing soils to retain sufficient moisture while enabling farmers to reduce the risk of spoilage during drying. In contrast, unimodal areas continued to experience below-average rainfall, which has persisted since April. While crops such as sorghum, millet, and simsim have reached flowering stages, yield potential may be constrained if the rainfall deficit continues into July. Temperatures across much of the country have remained moderate, supporting healthy crop development where soil moisture is adequate.

● Crop Performance

In the bimodal zones, the slowdown in rainfall has coincided with peak harvesting of beans and early maize, improving household food stocks and market supply. The favourable weather has enhanced the quality of dried produce, particularly beans, groundnuts, and maize grain, which may reduce post-harvest losses. Coffee harvesting has continued in several producing districts, although prices in June dropped by about 20% compared to April levels, largely due to increased global supply and competitive pricing in export markets. Vegetable production, including tomatoes, cabbages, and leafy greens, has remained steady in well-watered areas, but in unimodal zones, the ongoing rainfall deficit may limit yields of rain-fed horticultural crops as the season progresses.

● Livestock Production

Pasture and water availability in most bimodal areas have remained sufficient to sustain good livestock body condition and stable milk yields, aided by moderate temperatures and earlier rainfall. This has helped keep feed costs relatively stable for dairy and beef producers. However, unimodal and southwestern cattle corridor areas continue to face grazing pressure and, in some cases, require supplementary feeding to maintain herd productivity. Poultry and piggery enterprises have benefitted from a gradual increase in the availability of feed grains, particularly maize, following early harvests in bimodal areas.

● Market Prices

Despite increased inflows of fresh produce into markets in June, staple food prices have not significantly declined. Maize and bean prices in urban retail markets have remained largely stable, reflecting slow price transmission from rural production areas and the influence of transport costs. Coffee prices, however, experienced a notable fall of around 20% compared to April, reducing immediate cash earnings for coffee farmers despite the good harvest volumes. Prices for vegetables have been relatively stable in most urban markets, while milk and meat prices have shown little change from May levels due to steady supply.

● Food Security

Food availability in bimodal areas has continued to improve as harvests bolster household stocks and dietary diversity. This is expected to gradually ease market depen-

dence in these zones through mid-year. In unimodal areas, however, limited rainfall and reliance on markets for staple foods have maintained pressure on household purchasing power, particularly for low-income families. While milk availability has improved in several regions, food security in areas facing prolonged rainfall deficits will remain fragile until the main harvest in the third quarter.

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

Commodity	Kampala (Owino/Kisenyi)		Mbarara		Mubende		Arua	
	WSP	RT	FGP	RT	FGP	RT	FGP	RT
Beans Nambaale	4,400	5,000	3,800	4,200	4,000	4,200	3,600	4,000
Beans Yellow	4,500	5,000	3,800	4,200	4,000	4,200	3,600	4,000
Maize grain	1,200	1,400	800	1,000	900	1,000	650	900
Millet	4,300	4,800	4,200	4,500	4,200	4,500	3,500	4,000
Groundnuts	5,500	6,000	5,000	5,400	5,000	6,000	5,000	5,500
Cow peas	5,000	5,800	5,200	5,800	5,200	5,600	4,500	5,200
Rice (Super)	4,000	4,500	3,600	4,000	3,800	4,000	3,500	4,000
Bananas (Medium)	30,000	34,000	20,000	28,000	24,000	30,000	22,000	28,000
Fresh cassava	1,050	1,450	950	1,200	1,000	1,200	900	1,000
Irish potato	1,600	2,000	1,300	1,700	1,400	1,800	1,200	1,600
Sweet potato	1,350	1,750	1,000	1,400	900	1,100	750	900
Fresh Milk (Litre)	1,600	2,000	1,000	1,400	1,400	1,600	1,300	1,600
Coffee Clean (Robusta)	13,000	–	12,000	–	12,000	–	–	11,000
Beef (Kg)	15,000	18,000	–	16,000	–	16,000	–	16,000
Goat Meat (Kg)	18,000	20,000	–	18,000	–	18,000	–	17,000

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

Projected Outlook - July 2025

● Bimodal Areas:

In the bimodal production zones, the first-season harvest will continue into early July, particularly for maize, beans, groundnuts, and vegetables. The favourable drying conditions of late June will carry into the first half of July, maintaining grain quality and reducing post-harvest losses. However, as sunshine intensifies and the dry season approaches its peak, pasture and water availability will decline in the dry belts of the southwestern and cattle corridor districts, especially in the Ankole–Masaka area. This will create feed and water stress for livestock, potentially lowering milk yields and increasing reliance on purchased feeds. Market supplies of staples will remain high, exerting mild downward pressure on farmgate prices, though urban retail prices may adjust more gradually due to transport and handling costs. Coffee harvesting will remain active, but prices, already 20% lower in June than in April, are likely to fall further in July due to subdued international demand and increased global supply.

● Unimodal Areas:

In unimodal regions, short-gestation crops such as beans, green maize, and certain vegetables will begin to be harvested in July, providing partial relief in food supply for households and easing pressure on markets. Most staples, including sorghum and millet, will continue maturing through August before the main harvest. Rainfall deficits in previous months may still limit yields in some areas, but the arrival of short-gestation crop harvests should improve dietary diversity and reduce reliance on market purchases. Livestock conditions are expected to remain stable where pasture regeneration has occurred, while poultry and piggery enterprises will benefit from maize inflows from bimodal areas, helping to ease feed cost pressures.

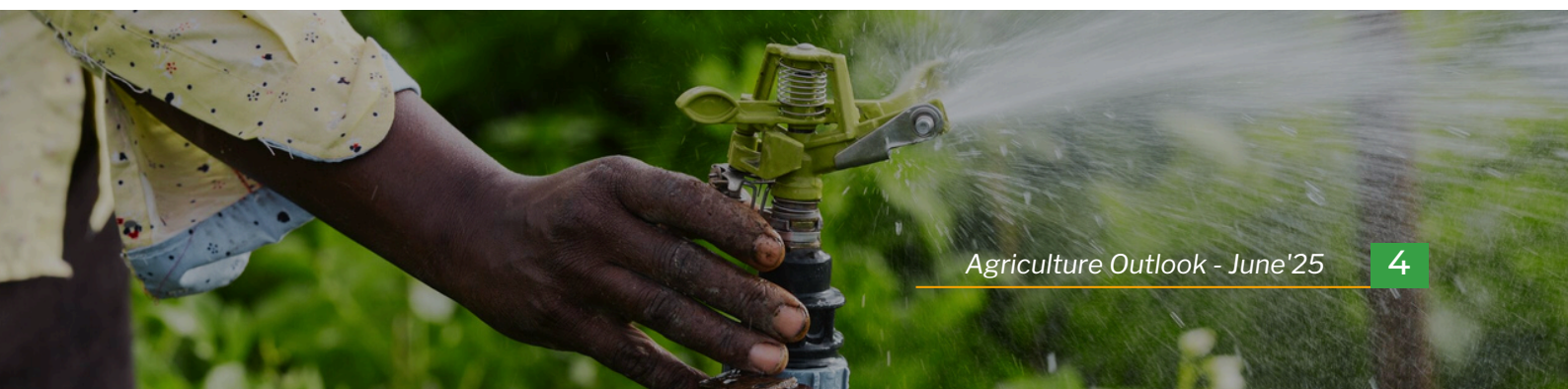
CONCLUSION:

June 2025 saw mixed agricultural performance across Uganda's production zones. In the bimodal areas, the slowing of rains towards the end of the month provided favourable conditions for drying and storing first-season harvests, leading to improved produce quality and reduced post-harvest losses. However, the intensifying sunshine as the dry season advances is already straining pasture and water resources in the dry belts of the southwestern and cattle corridor districts, particularly in the Ankole–Masaka area. Coffee harvesting continued, but prices dropped by about 20% from April and are projected to fall further in July. In unimodal areas, the prolonged rainfall deficit has constrained crop growth, although the July harvest of short-gestation crops such as beans and green maize will bring some relief to food supply and dietary diversity. Market prices for most staples remained stable despite increased supply, largely due to slow price transmission and transport-related costs. Overall, food availability improved in many bimodal areas, but market dependence and limited purchasing power remain challenges in unimodal and dry belt districts.

RECOMMENDATIONS

General Recommendations:

1. Support the scaling up of on-farm water harvesting and small-scale irrigation technologies in dry belt areas to reduce vulnerability during the peak dry season..
2. Promote livestock feed conservation practices, such as hay and silage making, ahead of the dry season in southwestern and cattle corridor districts.
3. Strengthen farmer training in proper post-harvest handling to preserve quality and minimise losses for cereals, legumes, and coffee.



Advocacy Recommendations:

1. Engage policymakers to prioritise investment in rural water infrastructure for both agricultural and household use in drought-prone bimodal zones.
2. Advocate for fairer coffee trade terms and interventions that buffer farmers from sharp international price declines, such as price stabilisation funds or cooperatives with stronger bargaining power.
3. Push for increased extension service coverage, particularly in dry belt and unimodal areas, to provide timely agronomic and livestock management advice.

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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”**.

Contact

Advocacy Coalition for Sustainable Agriculture
P.O Box 21556, Kampala - Uganda
Tel: +256 414670400 / 772463220
Email: acsa@acsa-ug.org

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 www.acsa-ug.org



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