Agriculture Outlook for May, 2025

With Average Retail Market Price Performances of Selected Commodities

BACKGROUND:

Uganda's agriculture sector remains central to the economy and livelihoods, contributing 22.1% to GDP in the third quarter of the 2024/25 fiscal year (January–March 2025) and supporting a year-on-year GDP growth rate of 6.7% compared to 5.6% in the same period of the previous year (Uganda Bureau of Statistics [UBOS], 2025). About 80% of households rely on agriculture for employment and subsistence (UBOS, 2024c), with smallholder farmers, mostly cultivating less than five hectares, forming the backbone of national food security and poverty reduction (Food and Agriculture Organization [FAO], 2024).

The sector's performance is shaped by climate variability, market access limitations, and post-harvest losses, and early 2025 forecasts indicated near-normal to above-normal rainfall across much of Uganda, but with below-average rainfall likely in the southwest and southern cattle corridor, potentially constraining crop and pasture development (IGAD Climate Prediction and Applications Centre [ICPAC], 2025). Strengthening access to timely agricultural information and scaling up climate-resilient practices remain critical for improving farmer decision-making, profitability, and food security, making the sector a cornerstone of Uganda's economic stability and sustainable development.

May 2025 Performance

- **Weather Conditions**

May 2025 was characterised by generally consistent rainfall in most bimodal areas, supporting favourable soil moisture for crop growth and pasture regeneration. Central, eastern, and northern regions are benefiting from near-normal to above-normal precipitation, while parts of the southwest and southern cattle corridor are experiencing below-average totals, limiting water infiltration and pasture recovery (IGAD Climate Prediction and Applications Centre [ICPAC], 2025). Temperatures have remained moderate, reducing evapotranspiration stress and aiding crop development. In some low-lying eastern districts, cumulative rainfall from April into early May has increased the risk of localised flooding, potentially affecting certain vegetable-producing zones.

- **Crop Performance**

In the bimodal zones, improved rainfall has supported strong vegetative growth of early-maturing crops such as beans and maize, with bean harvesting expected to commence in the latter half of the month. Maize is progressing well into the reproductive stage, and coffee harvesting is beginning in several producing districts, buoyed by continued high prices from strong export demand. Vegetable production, particularly tomatoes, cabbages, and leafy greens, is expanding in areas with adequate moisture, which could moderate market prices. In unimodal areas, farmers are completing planting of long-cycle cereals such as millet and sorghum, although those in the southwest may see slower germination and reduced yield potential where rainfall deficits persist.

- **Livestock Production**

Pasture and water availability are improving in most regions, leading to better livestock body condition and increased milk yields. This is expected to reduce the reliance on purchased feeds and gradually lower production costs for dairy and beef enterprises. However, in the southwestern and southern cattle corridor districts where rainfall has been below average, grazing pressure remains high, and feed supplementation may still be necessary. Poultry and piggery enterprises are likely to benefit from improving availability of maize and other feed grains towards the end of the month, which should ease input costs.

- **Market Prices**

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- **Food Security**

Food availability in bimodal regions is expected to improve as early harvests reduce market dependence and enhance dietary diversity. In unimodal and southwestern areas, market reliance will continue through May, sustaining vulnerability to high staple food prices until later harvests arrive. Karamoja's food security outlook is more positive compared to earlier in the year, with better pasture and water improving livestock productivity, though households with limited purchasing power will remain dependent on market purchases and, in some cases, humanitarian assistance.

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

Commodity	Kampala (Owino/Kisenyi)		Mbarara		Mubende		Arua	
	WSP	RT	FGP	RT	FGP	RT	FGP	RT
Beans Nambaale	4,600	5,000	4,000	4,200	4,000	4,200	3,600	4,000
Beans Yellow	4,700	5,000	4,000	4,200	4,000	4,200	3,600	4,000
Maize grain	1,200	1,400	900	1,000	1,000	1,200	650	950
Millet	4,300	4,800	4,200	4,500	4,200	4,500	3,500	4,000
Groundnuts	5,700	6,500	5,000	5,500	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	4,600	3,600	3,800	3,800	4,000	3,520	4,000
Bananas (Medium)	31,500	35,000	22,000	30,000	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	1,550	1,950	1,200	1,600	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)	1,550	2,000	1,000	1,400	1,400	1,600	1,300	1,600
Coffee Clean (Robusta)	14,000	–	13,000	–	13,000	–	–	13,000
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 - June 2025

- **Bimodal Areas:**

As the first season draws to a close, harvesting of beans, maize, and other early-maturing crops is expected to intensify across the bimodal zones. The increased inflow of fresh produce into rural and urban markets is likely to place downward pressure on farmgate and wholesale prices for staples, with urban retail markets adjusting progressively depending on transport costs and trader dynamics. Prices for millet and groundnuts may also decline modestly as more volumes from rural areas reach trading centres.

Coffee harvesting will also intensify in June, with trading activity picking up across producing districts. The strong demand in both regional and international markets is expected to sustain attractive prices, potentially boosting household incomes in coffee-growing areas. This will likely improve purchasing power for farming households, particularly where coffee income is supplemented by food crop sales. Increased harvesting activity will also provide short-term employment opportunities for seasonal labourers. However, reports from various coffee-producing sub-counties indicate incidents of theft gardens and post-harvest drying areas, which could reduce marketable volumes and compromise quality, thereby affecting potential earnings for both farmers and traders. However, reports from various coffee-producing sub-counties indicate incidents of theft from gardens and post-harvest drying areas, which could reduce marketable volumes and compromise quality, thereby affecting potential earnings for both farmers and traders.

Pasture conditions are expected to remain favourable in most of the bimodal belt, supporting stable or slightly lower prices for milk and meat. Livestock body condition should improve further, reducing dependence on purchased feeds and strengthening dairy and beef enterprise profitability.

- **Unimodal Areas**:

In the unimodal regions, the main season crop growth will continue through June, with sorghum, millet, and simsim in active vegetative and reproductive stages. Rainfall is expected to maintain adequate soil moisture, supporting good crop development. However, households in these areas will remain dependent on market purchases for staple foods until their main harvests in the third quarter of the year. As a result, retail prices for maize and beans are likely to remain elevated, though there may be some easing if inflows from bimodal harvests reach local markets in larger volumes.

Livestock conditions should continue improving as pasture and water sources remain adequate. This will help reduce the need for supplementary feeding, potentially leading to slight reductions in the prices of milk and meat. Poultry and piggery enterprises will benefit from increased availability of feed grains, easing cost pressures and improving production margins.

CONCLUSION:

May 2025 has seen improved agricultural performance in most bimodal areas, with consistent rainfall supporting the growth and harvesting of beans, maize, and vegetables, and driving gradual price reductions for staples. Coffee harvesting has gained momentum, sustaining high prices that are boosting incomes for farming households; however, theft during harvesting and post-harvest handling, alongside poor harvesting practices such as picking unripe cherries, threatens both quality and earnings. Livestock productivity has improved due to better pasture and water conditions, reducing feed costs and stabilising milk and meat prices. In contrast, unimodal and southwestern rainfall-deficit areas remain heavily dependent on markets, with elevated staple prices continuing to limit purchasing power. While the season's conditions have created opportunities for improved food security and incomes, these gains remain vulnerable to post-harvest losses, crop theft, and uneven rainfall distribution.

General Recommendations:

1. Promote the cultivation of drought-tolerant and early-maturing crop varieties to enable farmers in both bimodal and unimodal areas to adapt to unpredictable rainfall patterns.

2. Support the adoption of agroecological practices, such as intercropping, mulching, and soil and water conservation, to improve productivity while reducing reliance on expensive inputs.

3. Enhance post-harvest handling and quality control for coffee and cereals by training farmers on proper harvesting techniques (e.g., picking only ripe coffee cherries) and providing facilities for secure storage and proper drying.

Advocacy Recommendations:

1. Advocate for increased recruitment and deployment of agricultural extension staff to improve access to timely agronomic and livestock management advice.

2. Engage policymakers and law enforcement to strengthen measures against coffee theft at both farm and post-harvest stages, including support for community policing initiatives in producing areas.

3. Promote policy and financial support for the scaling up of sustainable farming systems and farmer group marketing structures to increase returns and market access

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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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