



SEASONAL MARKET OUTLOOK

Collective Voices for Sustainable Development

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Summary Performance of the Season from March to July 2025 with Average Retail Market Price Performances of Selected Commodities



BACKGROUND

Agriculture remains a cornerstone of Uganda's economy, contributing approximately 26.2% to the national Gross Domestic Product (GDP) in the fiscal year 2024/25, up from 24.7% in the previous year (Uganda Bureau of Statistics [UBOS], 2025). The sector employs about 66% of the country's workforce, reflecting its central role in sustaining livelihoods and supporting economic stability (World Bank, 2022). The agriculture market in Uganda was valued at USD 4.07 billion in 2023 and is projected to grow to USD 6.21 billion by 2031, representing a compound annual growth rate (CAGR) of 4.20% (Mordor Intelligence, 2024). This trajectory is supported by government initiatives such as the Parish Development Model and the Agricultural Credit Facility, which aim to enhance productivity and market access. Uganda's agricultural exports continue to show strong performance, with coffee, cocoa, and tobacco among the leading earners.

About 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 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”**.

Background

Agriculture remains a cornerstone of Uganda's economy, contributing approximately **26.2%** to the national Gross Domestic Product (GDP) in the fiscal year 2024/25, up from 24.7% in the previous year (Uganda Bureau of Statistics [UBOS], 2025). The sector employs about **66%** of the country's workforce, reflecting its central role in sustaining livelihoods and supporting economic stability (World Bank, 2022). Uganda covers a total land area of 241,559 square kilometres, with 80% classified as arable land; however, only about 35% of this arable land is currently under cultivation, highlighting significant potential for agricultural expansion (International Trade Administration [ITA], 2023). The country’s favourable climate and fertile soils provide an excellent foundation for diverse agricultural activities, including crop production and livestock farming.

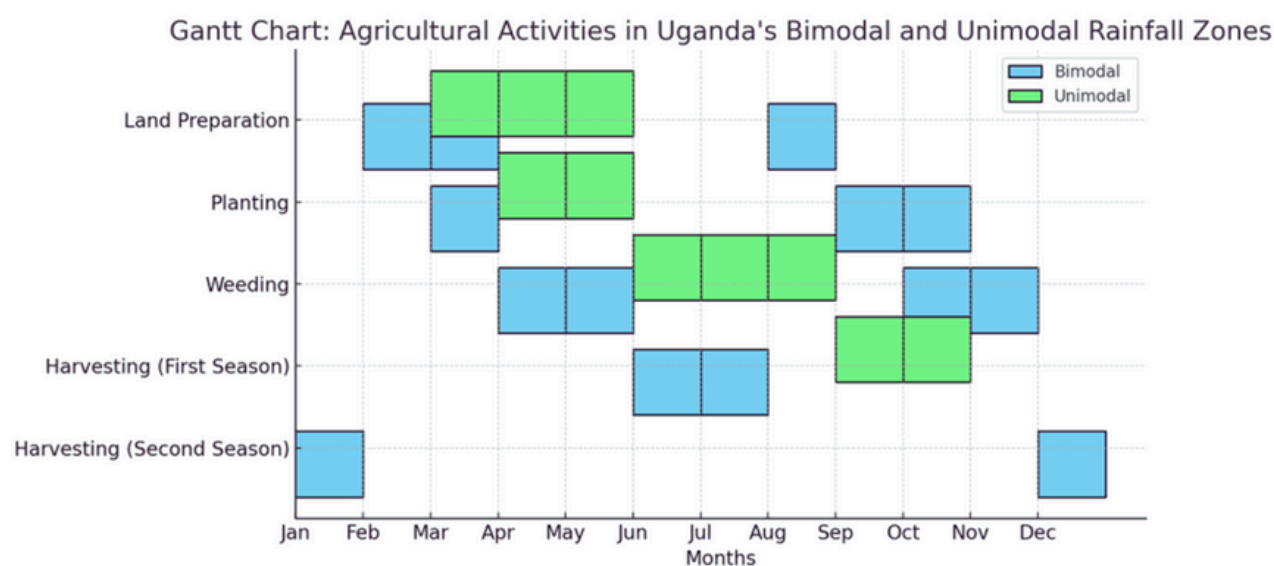
The agriculture market in Uganda was valued at **USD 4.07 billion in 2023** and is projected to grow to **USD 6.21 billion by 2031**, representing a compound annual growth rate (CAGR) of 4.20% (Mordor Intelligence, 2024). This trajectory is supported by government initiatives such as the Parish Development Model and the Agricultural Credit Facility, which aim to enhance productivity and market access. Uganda’s agricultural exports continue to show strong performance, with coffee, cocoa, and tobacco among the leading earners. In February 2025, coffee export earnings more than doubled to **USD 167.68 million**, up from USD 82.56 million in the same month the previous year, while cocoa export receipts increased by **164.4%** to **USD 68.7 million** (Bank of Uganda [BoU], 2025). These figures underscore the sector’s potential to boost foreign exchange earnings and rural incomes. Nevertheless, constraints such as low mechanisation, post-harvest losses, and limited market access remain, making it imperative to address these challenges to unlock the full potential of Uganda’s agricultural sector and secure sustainable growth.



Agriculture Production Timeline in the Two Distinct Rainfall Pattern Areas

Uganda’s agricultural production is structured around two primary rainfall regimes: bimodal and unimodal. These climatic patterns shape the seasonal calendar, influencing the timing and sequence of farming activities across the country. Given that most agriculture in Uganda is rain-fed, variations in the onset, intensity, and distribution of rainfall directly affect land preparation, planting, crop growth, and harvesting cycles. The table below presents a comparative view of how agricultural activities correspond to these rainfall patterns in the different regions.

Seasonal Calendar for Agricultural Activities in Uganda’s Bimodal and Unimodal Rainfall Zones



Seasonal Performance (March - July 2025)

Bimodal Rainfall Pattern Areas

The March–July 2025 season in Uganda’s bimodal rainfall zones has been marked by generally favourable crop conditions, supported by near-average to above-average rainfall across most areas, although spatial variability has been observed (FEWS NET, 2025). In Bunyoro and the mid-west, steady rainfall from March through June facilitated strong vegetative growth in maize, beans, and groundnuts, with most crops currently in flowering to grain-filling stages. Crop monitoring data indicate that maize and bean conditions are predominantly rated as “good”, suggesting above-average harvest potential if weather conditions remain favourable through August (MAAIF, 2025). Eastern Uganda experienced localised flooding in parts of Butaleja and Budaka in April, which damaged some early-planted beans, but upland rice and cassava remain in fair to good condition (UBOS, 2025). Central Uganda reported robust horticultural performance, particularly for tomatoes and onions, partly supported by irrigation in peri-urban farming zones. The western highlands have benefited from cool, moist conditions, promoting vigorous growth of Irish potatoes and maize. Livestock productivity across the bimodal areas improved compared to the same period last year, with milk output increasing by an estimated 15–25%, supported by improved pasture conditions, adequate water sources,

and sustained vaccination campaigns for diseases such as foot-and-mouth disease and tick-borne illnesses (FAO, 2025).

Unimodal Rainfall Pattern Areas (Karamoja)

In Karamoja, the 2025 unimodal season began in April following a slight delay in rainfall onset. May and June brought well-distributed rains, supporting good establishment of sorghum, millet, and maize. Sorghum fields are currently in the early reproductive stage, while millet is at tillering to heading, and both crops are reported to be in fair to good condition (FEWS NET, 2025). Short-cycle crops such as beans and cowpeas, harvested in late June, provided important early food and income sources to households. Livestock productivity has been markedly better than last year's dry season, with milk production up by roughly 15%, supported by plentiful pasture and water resources, as well as effective control of contagious caprine pleuropneumonia and tick-borne diseases (MAAIF, 2025). Livestock market activity rose by an estimated 10–12%, driven by demand from South Sudan and neighbouring Ugandan regions (UBOS, 2025).

Agriculture Commodity Markets and Trade - Seasonal Summary (March -July 2025)

From March to July 2025, Uganda's commodity markets reflected seasonal harvest patterns and weather-driven supply constraints. In the bimodal regions, maize prices started high in March, retailing at UGX 1,100 to 1,300 per kilogram in Kampala, and rose slightly in April due to delayed planting and limited on-farm stocks (Famine Early Warning Systems Network [FEWS NET], 2025). As early harvests arrived in May and June, wholesale and farmgate prices in production hubs such as Mubende and Masindi softened to UGX 900 to 1,000 per kilogram, but urban retail prices adjusted more slowly due to high transport costs and trader margins (FEWS NET, 2025). Beans followed a similar trend, averaging UGX 4,600 to 4,700 per kilogram wholesale in Kampala in March and April before falling slightly with the first-season harvest in June. By July, prices rebounded in urban markets to UGX 5,200 per kilogram as supplies tightened (FEWS NET, 2025). Groundnut and millet prices remained firm through most of the period, with millet retailing at UGX 4,500 to 5,000 per kilogram and groundnuts at UGX 5,700 to 6,500 per kilogram (FEWS NET, 2025).

In unimodal Karamoja, maize and sorghum prices remained atypically high from March to May due to dependence on imports from Teso and Lango. Sorghum sold for UGX 1,800 to 2,000 per kilogram during this lean period, easing slightly in late June as short-cycle beans and cowpeas reached markets. However, July prices still exceeded the five-year average by about 18 to 20 percent (FEWS NET, 2025). Livestock markets across both rainfall zones strengthened as pasture conditions improved from May onward. In July, cattle fetched UGX 1.4 to 1.6 million in Moroto and Kotido, while goats sold for UGX 200,000 to 230,000 depending on size and breed (FEWS NET, 2025). Beef prices remained high in urban centres, retailing at UGX 15,000 to 18,500 per kilogram, while fresh milk prices ranged from UGX 1,100 in Mubende to UGX 2,100 in Mbarara (FEWS NET, 2025).

Coffee remained a major foreign exchange earner, with Robusta FAQ performing strongly in May and June before prices dropped in July. Farmgate prices for clean Robusta averaged UGX 14,000 per kilogram in March to May, supported by strong

export demand (Uganda Coffee Development Authority [UCDA], 2025). According to UCDA and the International Coffee Organization, exports between March and July totalled approximately 3.1 million 60-kilogram bags, about 6 percent higher than the same period in 2024, with Italy, Germany, and Sudan as top buyers. By July, peak harvest inflows in Central, Western, and Eastern coffee zones, coupled with subdued global demand, pushed farmgate Robusta FAQ prices down to UGX 9,000 to 12,500 per kilogram (UCDA, 2025). This decline at the Kiboko stage compressed margins for farmers and traders, especially in districts like Luwero, Hoima, and Kamuli where coffee is a key income source.

Overall, the March to July period was shaped by initial tight supplies and high prices in March and April, easing in May and June with the bimodal harvest, and mixed trends in July. Staple prices generally remained stable to slightly higher, livestock markets were buoyant, and coffee entered a post-harvest price slump. Regional trade remained active, with maize and beans moving from western and central surplus areas toward Kenya and South Sudan, and sorghum from eastern Uganda into Karamoja and across the border into South Sudan (FEWS NET, 2025).

Average Retail Prices for Selected Commodities, March–July 2025 (UGX/kg)



Impact of Seasonal Performance on Food Security (March–July 2025)

In the bimodal rainfall areas, early-season rains supported favourable crop establishment, leading to generally good first-season harvest prospects by June. Surplus-producing districts in central and western Uganda experienced improved household food availability, reducing dependence on market purchases and moderating staple price volatility during May and June (Famine Early Warning Systems Network [FEWS NET], 2025). Livestock conditions also improved with better pasture and water

access, contributing to both dietary diversity and income from milk and animal sales. According to the FAO (2025), these outcomes enabled most rural households in these regions to remain in Minimal (IPC Phase 1) food security conditions, although localised vulnerabilities persisted where planting was delayed or post-harvest losses were high.

In contrast, unimodal areas such as Karamoja faced a more fragile situation. While mid-season crop performance for sorghum, millet, and pulses was promising, the lean season persisted through July as harvesting had not yet commenced. Many households relied heavily on markets where staple prices were 15 to 20 percent above the five-year average (FEWS NET, 2025). Livestock productivity improved significantly due to good pasture regeneration, but the benefits were concentrated among households with sufficient herd sizes, leaving poor households unable to offset the impact of elevated food prices. As a result, a substantial proportion of the population remained in Crisis (IPC Phase 3) conditions, reflecting continued stress on food access and consumption (FAO, 2025).

Overall, seasonal performance between March and July 2025 reinforced food security in surplus-producing bimodal regions but did little to ease acute needs in chronically vulnerable unimodal zones. While the bimodal harvest temporarily improved food access and moderated prices, these gains could erode without strong post-harvest management and timely second-season planting. In Karamoja, even with positive livestock conditions, delayed crop harvests and sustained high market prices maintained food insecurity for the poorest households. FEWS NET (2025) projects that targeted livelihood and food assistance will be necessary in the unimodal areas until local harvests reach markets, while the FAO (2025) recommends strengthening storage and market linkages in bimodal regions to sustain seasonal gains.

Projected Outlook through to December 2025

In bimodal rainfall areas, the second cropping season beginning in August is expected to benefit from average to above-average rainfall, supporting timely planting of maize, beans, and other staples. FEWS NET (2025) anticipates that harvests from the first season will continue to bolster household food stocks into September, with minimal food insecurity (IPC Phase 1) prevailing in most surplus-producing zones. However, the lean season will emerge earlier than usual in some eastern and northern districts where post-harvest losses and market dependence remain high. Livestock productivity is projected to remain favourable through the end of the year due to sustained pasture conditions, but localised disease outbreaks could limit gains if veterinary services are inadequate. The FAO (2025) notes that market prices for staples are likely to follow seasonal trends, rising moderately in October and November before easing again with the second-season harvest in December.

In unimodal areas such as Karamoja, the main harvest from September to October is expected to improve household food access and reduce market dependence, shifting outcomes for many from Crisis (IPC Phase 3) to Stressed (IPC Phase 2) conditions (FEWS NET, 2025). Sorghum and millet production is forecast to be near average, provided rains continue through grain-filling stages in August. However, limited asset holdings, debt from the prolonged lean season, and high food prices are expected to constrain recovery for poorer households. Livestock conditions should remain stable

through December, offering milk and income opportunities, though pasture depletion may begin earlier than usual if the October rains taper quickly. The FAO (2025) cautions that without targeted livelihood support and market interventions, the most vulnerable households will remain at risk of food gaps even after the harvest.

Conclusion

Seasonal performance between March and July 2025 strengthened food security in surplus-producing bimodal areas, where early and well-distributed rainfall supported good harvest prospects for maize, beans, and other staples, boosted livestock productivity, and maintained stable or slightly higher market prices. These conditions enabled most households in these regions to sustain Minimal (IPC Phase 1) food security. In contrast, unimodal zones such as Karamoja continued to face a prolonged lean season, high staple prices, and delayed harvests, leaving many households in Crisis (IPC Phase 3) despite improvements in livestock conditions. Coffee exports remained strong during the first half of the year, but prices fell in July, reducing farmgate margins. Without strengthened post-harvest management, market linkages, and targeted assistance in vulnerable zones, current seasonal gains may diminish before the next harvest.

Recommendations

● For Smallholder Farmers:

- Prioritise early planting for the second bimodal season to take advantage of forecasted favourable rains.
- Adopt improved post-harvest handling and storage to reduce losses and maintain household food stocks.
- Diversify income sources through short-cycle crops and small livestock to cushion against seasonal market shocks.
- Engage in collective marketing through cooperatives to negotiate better farmgate prices, especially for coffee and legumes.

● For Government (through Local Governments and Direct Programmes):

- Scale up timely provision of agricultural inputs under existing programmes to ensure planting readiness.
- Expand access to affordable credit and market infrastructure, especially in unimodal regions facing recurrent food insecurity.
- Strengthen veterinary extension to control livestock diseases and sustain productivity gains.
- Support construction of community storage facilities to stabilise prices and protect surplus harvests in bimodal areas.



● For Civil Society Organisations Working with Smallholder Farmers:

- Intensify climate and market information dissemination to improve planting and marketing decisions.
- Provide training on agroecological practices and value addition to enhance household resilience.
- Partner with farmer cooperatives to link producers with reliable buyers and regional export markets.
- Target livelihood support and food assistance to households in unimodal areas projected to remain in Crisis (IPC Phase 3) through the end of 2025.

Farmer Support Resources within the ACSA Network

In the face of ongoing challenges and emerging opportunities, farmer-support programmes remain essential for empowering smallholders and closing knowledge gaps. The Advocacy Coalition for Sustainable Agriculture (ACSA) network plays a central role in this effort by providing innovative organic inputs, high-quality training, and practical on-farm extension services that promote sustainable agricultural practices. Several member organisations have developed notable farmer extension initiatives, including:

1. **Kulika Uganda:** Established a national training centre of excellence to build farmer skills and promote sustainable agriculture.
2. **Agency For Integrated Rural Development (AFIRD):** Developed a range of agroecological manures and fertilisers, and established a strategic training centre in Nkoowe, Wakiso District, serving both Wakiso and Mpigi districts.
3. **Uganda Youths at Risk Development Network (UYDNET)/KSAM farm:** Set up an agroecology training farm in Najjembe, Buikwe District, dedicated to mentoring farmers in the production and application of agroecological inputs.
4. **Mityana District Modern Farmers Association (MDMFO):** Spearheaded youth-led innovations in pest and disease control, as well as soil fertility management.
5. **Homeland Organics and Agro-tourism Center Limited:** Operates a practical training farm in Kibalinga, Mubende District, serving farmers in Mubende, Kyegegwa, and Kasanda with skills in agro-tourism and organic farming.
6. **RUCID Organic Agriculture Training College:** Provides comprehensive training in agroecological production, value addition, and best practices in post-harvest handling.

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