

Voluntary Report – Voluntary - Public Distribution

Date: August 28, 2026

Report Number: KE2026-0017

Report Name: Dry Weather Decimates Kenyan Harvest

Country: Kenya

Post: Nairobi

Report Category: Agricultural Situation, Grain and Feed

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Report Highlights:

FAS Nairobi is downgrading Kenya's marketing year 2026/27 corn production forecast by 51 percent to 2.2 million metric tons after a severe mid-year dry period struck key grain production areas. This shortfall will force Kenya to import a record 2.3 million MT of corn. In addition, wheat production forecast is reduced by over half to 130,000 tons. Conversely, managed irrigation will keep rice production stable at 225,000 MT, though the country will still need to import 750,000 MT to meet demand.

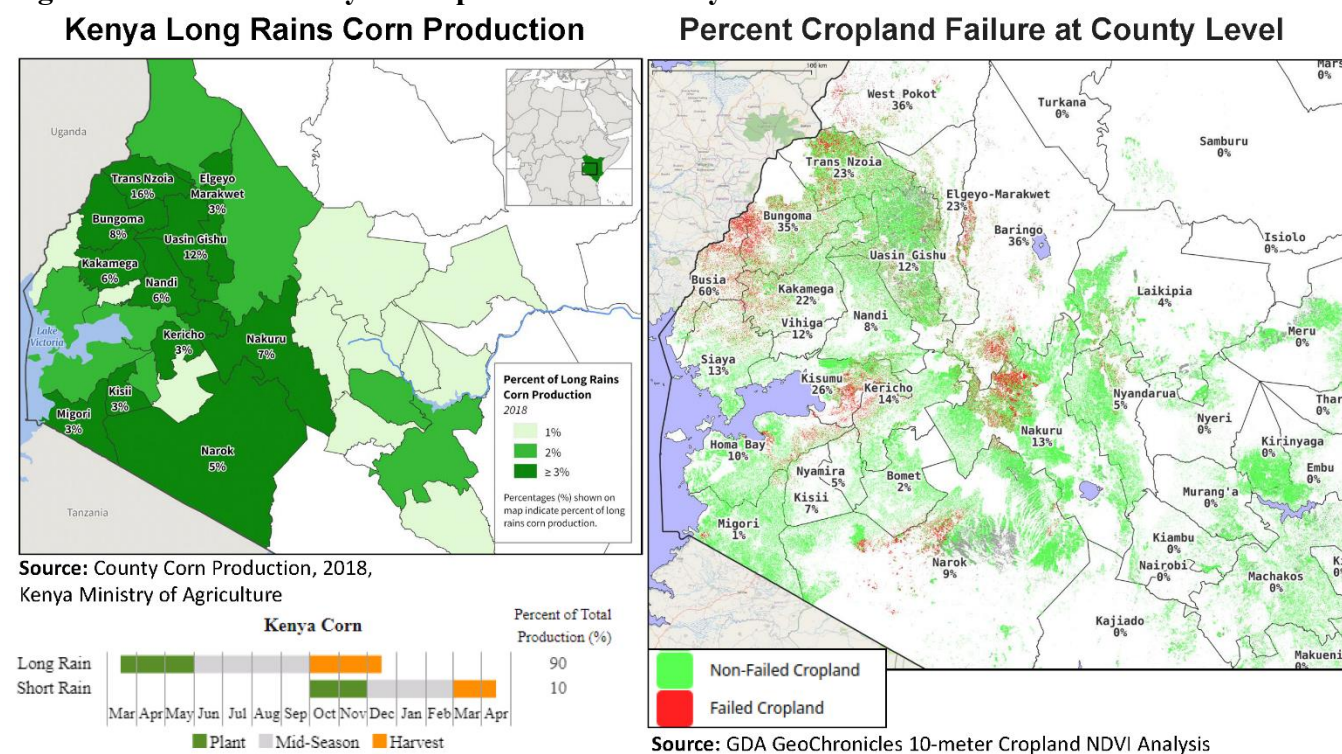
Executive Summary

Inclement Weather Damages Corn Crop - Large Production Drops Expected

From early June through late July 2026, Kenya experienced an unexpected dry spell across the western half of the country. The dry conditions damaged much of the corn and wheat crops that normally would have been harvested in November 2026. Based on satellite weather observations from June through July and in-person field visits during the last week of July 2026, FAS Nairobi recommends significant decreases to corn and wheat production estimates across Western Kenya.

Throughout much of Kenya's grain producing regions, rainfall levels in June and July were at some of their lowest levels since 1980. Monthly precipitation across much of the west of the country reached its lowest levels in the last 30 years from early June until the last week of July 2026. In some cases, precipitation was more than 200 millimeters below normal during June and July. Some rain did begin to fall across the region in the final days of July. By that time, however, crop failures were already widespread. Figure 1 illustrates cropland failure at county level.

Figure 1: Estimated Kenyan Crop Failure at County Level

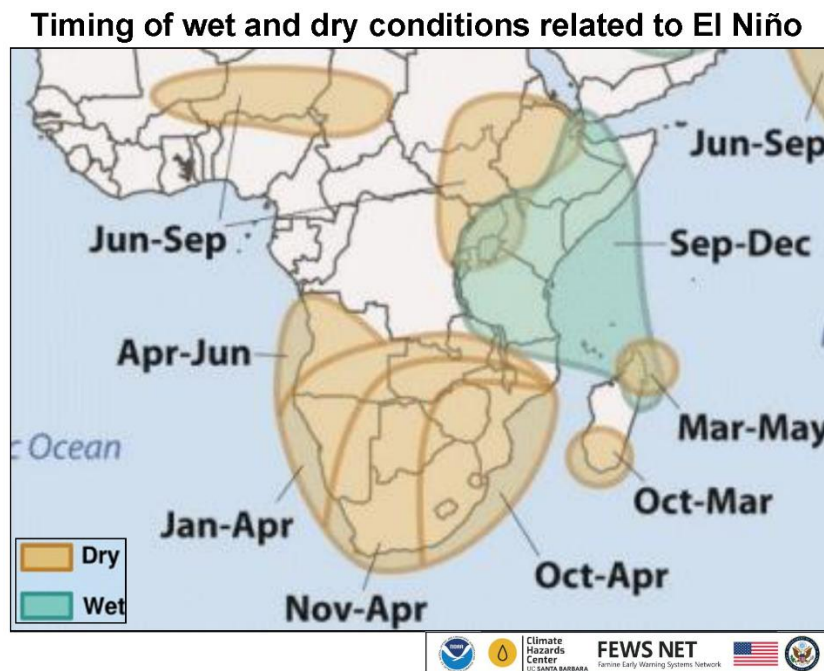


Source: FAS/IPAD

Post expects continued abnormal weather for the remainder of 2026 and into 2027 as a result of the ongoing El Niño. The establishing El Niño event coupled with a highly positive Indian Ocean Dipole is expected to bring heavy rains later in the year with an 80 to 82 percent probability of shifting the region into an intense, hyper-wet season by October. Kenyan weather experts warn that this year's setup mimics the conditions that fueled the historic and catastrophic East African floods of 1997.

While the rains will replenish depleted water reservoirs, the expected sudden transition from dry conditions to extremely wet conditions will present a high risk of widespread flash flooding. The impact on food production includes washing away of crops and increased post-harvest spoilage due to inadequate drying. The El Niño impact is likely to be felt most in the short-rain growing regions in Eastern and Central Kenya.

Figure 2: Forecast Impacts of the 2026 El Niño



Corn

Table 1: Production, Supply and Distribution (PSD)

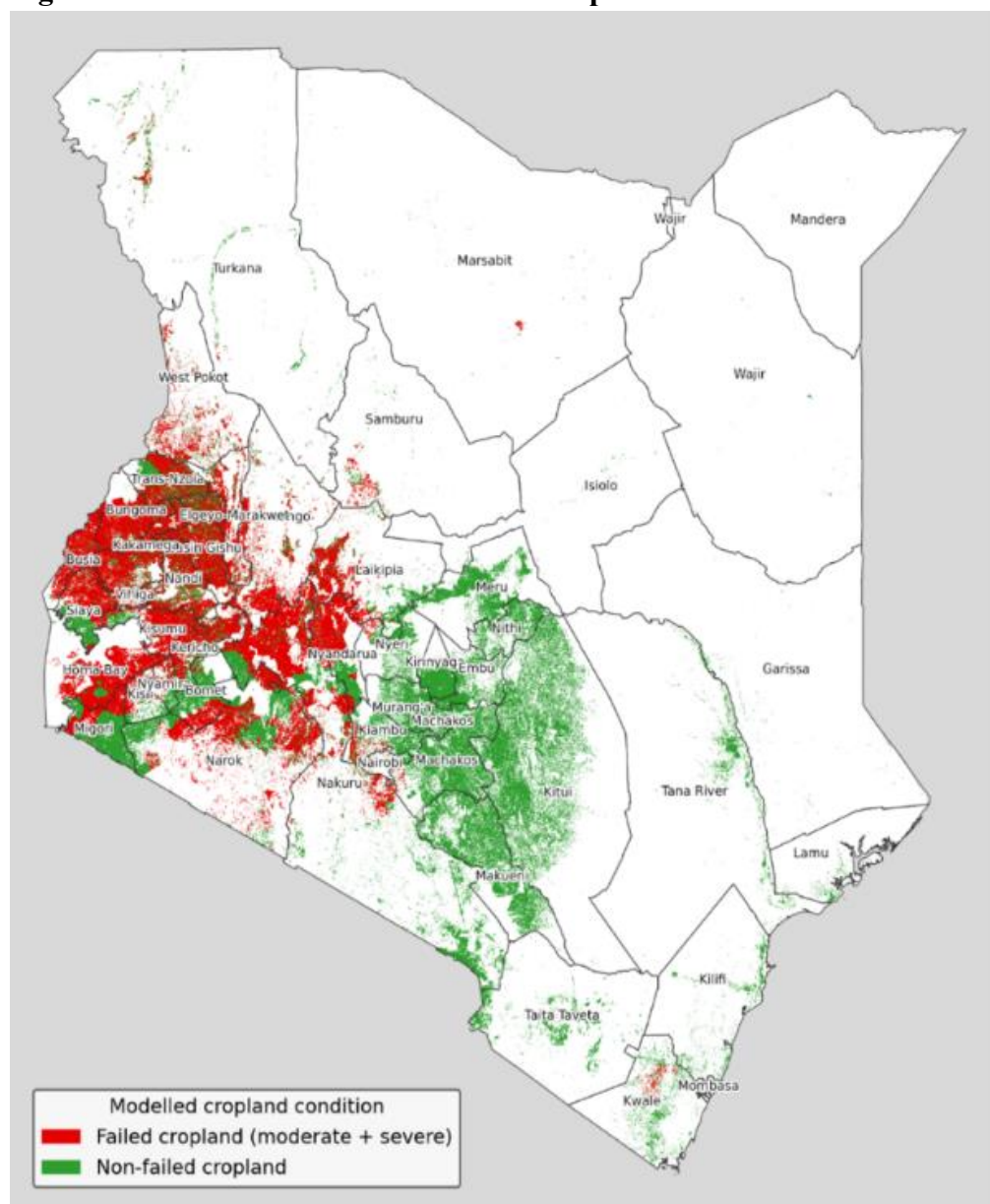
Corn Market Year Begins Kenya	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2415	2100	1900	1900	1800	1500
Beginning Stocks (1000 MT)	418	418	379	252	234	107
Production (1000 MT)	4023	3800	3400	3400	3000	2200
MY Imports (1000 MT)	440	436	560	560	700	2300
TY Imports (1000 MT)	470	464	650	650	700	2300
Total Supply (1000 MT)	4881	4654	4339	4212	3934	4607
MY Exports (1000 MT)	2	2	5	5	5	0
TY Exports (1000 MT)	3	3	5	5	5	0
Feed and Residual (1000 MT)	400	400	300	300	250	450
FSI Consumption (1000 MT)	4100	4000	3800	3800	3550	4050
Total Consumption (1000 MT)	4500	4400	4100	4100	3800	4500
Ending Stocks (1000 MT)	379	252	234	107	129	107
Total Distribution (1000 MT)	4881	4654	4339	4212	3934	4607
Yield (MT/HA)	1.6658	1.8095	1.7895	1.7895	1.6667	1.4667
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS Nairobi revises Kenya's marketing year (MY) 2026/27 corn production forecast downwards to 2.2 million metric tons (MT). This represents a 51 percent reduction from Post's initial projection of 4.5 million MT. Despite a significant expansion in planted area, driven by the previous season's performance and government support, erratic weather patterns have damaged wide swaths of planted area. Early rains were followed by a prolonged dry spell during critical crop growth stages in June and July. The result of this unusual weather was widespread wilting and stunting of corn and other crops.

The mid-season dry spell caused unprecedented damage across Kenya's primary *grain basket* counties. Post field observations and International Production Assessment Division's (IPAD) regional satellite-based data indicate widespread crop failure, particularly in the North Rift Valley and Western regions. In those areas close to half of the total area planted has been wiped out. Post estimates that surviving fields will also face decreased yields as high as 35 percent. This widespread failure is heavily concentrated in key surplus production counties, including Uasin Gishu, Trans Nzoia, and Nakuru.

Figure 3: Estimated Location of Failed Cropland



Source: FAS/International Production Assessment Division.

Figure 4: Heat Damaged Corn in Moiben, Uasin Gishu County



Source: FAS/ Nairobi

Figure 5: Corn Field Following Late July Rain Suam, Trans-Nzoia County



Source: FAS/Nairobi

Consumption

Post retains the earlier MY 2026/27 consumption forecast of 4.5 million MT due to inelastic human demand for white corn, the country's primary staple food. However, the domestic animal feed industry faces perennial deficits, and millers risk operational collapse if the projected corn imports fail to materialize. The corn pressure is intensified due to the depleted strategic reserves. Local corn prices have already surged past Ksh 50,000 (\$387.60) per MT at local buying centers. With Kenya's long-standing ban on genetically modified products, the feed industry may need to revert to alternatives, like lower-cost, non-GMO sorghum.

Trade

FAS Nairobi projects Kenya will face a critical corn shortfall of 2.2 million metric tons in MY 2026/27. To secure its national food supply, the country must scale imports to a historic high of 2.3 million tons. While the Kenyan government already announced intentions to import corn, its specific supply sources remain unclear. Kenya's traditional regional partners cannot cover a deficit of this magnitude due to widespread agricultural challenges.

Figure 6: Kenya Corn Import Trends (2025-2026)



Source: Trade Data Monitor

Regional suppliers have also been impacted by unusual weather in this growing season. Adverse weather in eastern Uganda depressed domestic output, while Tanzania forecasts a significantly tighter exportable surplus of only 800,000 metric tons. Conversely, Zambia achieved a historic bumper harvest in its 2026/27 crop marketing season. Their current food balance sheet suggests a net exportable corn surplus of around 1.47 million metric tons. However, actual export volumes may be curtailed or restricted due to the looming El Niño conditions and lower production expectations for the subsequent cycle.

Table 2: Kenya Corn Import Feasibility (2026/27)

Country	Forecast Production (Million MT)	Forecast Exports (Million MT)	Forecast Ending Stocks (Million MT)	Remarks
Argentina	55.00	40.00	4.01	GE / Yellow Corn: Large exportable surplus. 50 percent tariff in Kenya
Brazil	139.00	43.00	10.10	GE / Yellow Corn: Large exportable surplus. 50 percent tariffs in Kenya.
South Africa	15.50	2.50	2.60	GE / White and Yellow: Large exportable surplus. Sourcing is heavily constrained by Kenya's GMO ban.
Tanzania	7.30	0.70	0.39	Non-GM / White Corn: Traditional supplier to Kenya. Duty-free access. Sourcing restricted through permitting.
Uganda	5.00	0.30	0.75	Non-GM / White Corn: Traditional supplier to Kenya. Duty-free access.
Ukraine	31.8	22.00	4.86	Non-GM & GM / Yellow Corn: Exports constrained by war and logistics disruptions. 50 percent tariffs in Kenya.
United States	406.75	83.19	41.98	GE / Yellow Corn: The world's largest corn exporter. Limited non-GM white corn. 50 percent tariffs in Kenya.
Zambia	4.93	0.60	1.47	Non-GM / White Corn: Regional supplier high 2026/27 production. Duty-free access.

Source: FAS Nairobi / PSD

Wheat

Table 3: Production, Supply and Distribution (PSD)

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Kenya	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	110	110	90	90	100	70
Beginning Stocks (1000 MT)	311	311	134	190	469	525
Production (1000 MT)	265	265	220	220	280	130
MY Imports (1000 MT)	2237	2286	3125	3125	2600	2600
TY Imports (1000 MT)	2237	2286	3125	3125	2600	2600
Total Supply (1000 MT)	2813	2862	3479	3535	3349	3255
MY Exports (1000 MT)	29	22	50	50	20	20
TY Exports (1000 MT)	29	22	50	50	20	20
Feed and Residual (1000 MT)	150	150	160	160	160	165
FSI Consumption (1000 MT)	2500	2500	2800	2800	2850	2850
Total Consumption (1000 MT)	2650	2650	2960	2960	3010	3015
Ending Stocks (1000 MT)	134	190	469	525	319	220
Total Distribution (1000 MT)	2813	2862	3479	3535	3349	3255
Yield (MT/HA)	2.4091	2.4091	2.4444	2.4444	2.8	1.8571
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2026/2027 = July 2026 - June 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Post is sharply downgrading its wheat production forecast for Kenya's MY 2026/27 to 130,000 metric tons. This severe reduction cuts the initial projection of 280,000 metric tons by more than half. The primary driver behind this reduction is the extended period of intense dryness gripping major wheat-producing counties across the Rift Valley region.

Due to these harsh weather shocks, the total area harvested is now projected to drop to 70,000 hectares significantly down from the earlier estimate of 100,000 hectares. Consequently, the national average yield is expected to plunge to 1.8 tons per hectare, representing a steep 35.7 percent decline from the original forecast of 2.8 metric tons per hectare. Beyond the drop in volume, local industry sources anticipate a drop in crop quality. The prolonged drought is expected to compromise the physiological development of wheat, ultimately leaving milling companies to deal with low-test weights and stunted, small grain sizes.

Consumption

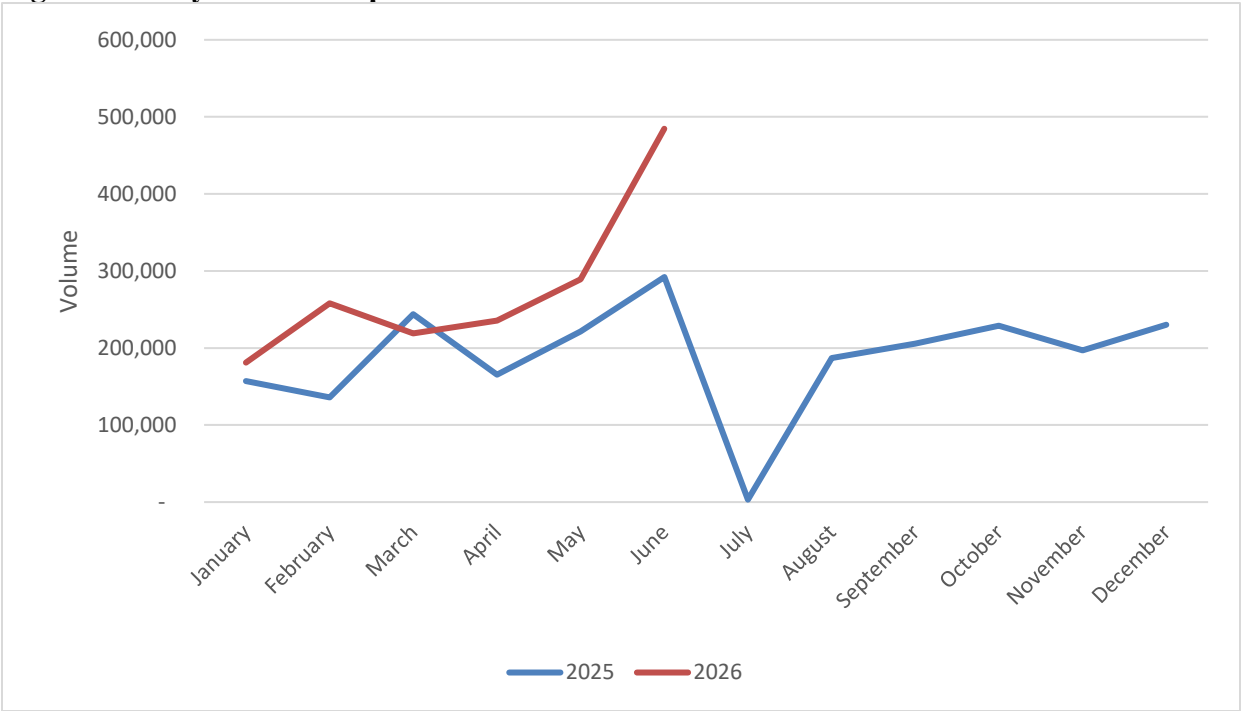
Despite the severe local harvest shortfall, demand for wheat-based products (bread, pasta, and confectionery) is expected to remain steady due to urbanization and an expanding middle class. Since local production historically satisfies less than 15 percent of demand, the domestic milling sector will escape a major disruption by importing from the global markets.

Trade

To offset the domestic production deficit, Kenya will likely fast-track wheat imports, estimated at 2.6 million MT for MY 2026/2027. Kenyan millers traditionally rely heavily on imports from the Black Sea region, Argentina, and Australia. Under recent regulatory changes, all imported U.S. wheat must now

undergo mandatory destination inspections at the port of entry. This shift follows Kenya's termination of the pre-export inspection program within the United States.

Figure 7: Kenya Wheat Import Trends



Source: Trade Data Monitor

Rice

Table 4: Production, Supply and Distribution (PSD)

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Kenya	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	55	45	60	50		55
Beginning Stocks (1000 MT)	178	178	149	149		149
Milled Production (1000 MT)	185	185	205	180		225
Rough Production (1000 MT)	280	280	311	273		341
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600		6600
MY Imports (1000 MT)	736	736	750	760		750
TY Imports (1000 MT)	750	750	650	780		760
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	1099	1099	1104	1089		1124
MY Exports (1000 MT)	0	0	0	0		0
TY Exports (1000 MT)	0	0	0	0		0
Consumption and Residual (1000 MT)	950	950	925	960		970
Ending Stocks (1000 MT)	149	149	179	129		154
Total Distribution (1000 MT)	1099	1099	1104	1089		1124
Yield (Rough) (MT/HA)	5.0909	6.2222	5.1833	5.46		6.2
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS Nairobi maintains its MY 2026/27 rice production forecast a 225,000 MT over a total harvested area of 55,000 hectares, and a steady average yield of 6.2 metric tons per hectare.

Unlike corn and wheat, which rely predominantly on rain-fed agricultural systems, farmers cultivate the vast bulk of Kenya's rice within managed irrigation schemes—primarily the Mwea Irrigation Scheme in the Central Kenya region. Although river flows feeding these irrigation blocks experience minor seasonal variations, effective water management successfully mitigates severe yield shortfalls. Still, parts of Mwea Irrigation Scheme have faced water shortages due to an ongoing dry spell and the significantly depleted water levels at the Thiba Dam. Though the completion of this dam initially stabilized water distribution, an early-year drought triggered water rationing that disrupted rice production in localized parts of the scheme. According to the National Irrigation Authority, a new irrigation canal infrastructure project that is slated for completion in August 2026, will immediately bring an additional 10,000 acres under cultivation, and offset the localized production shortfalls.

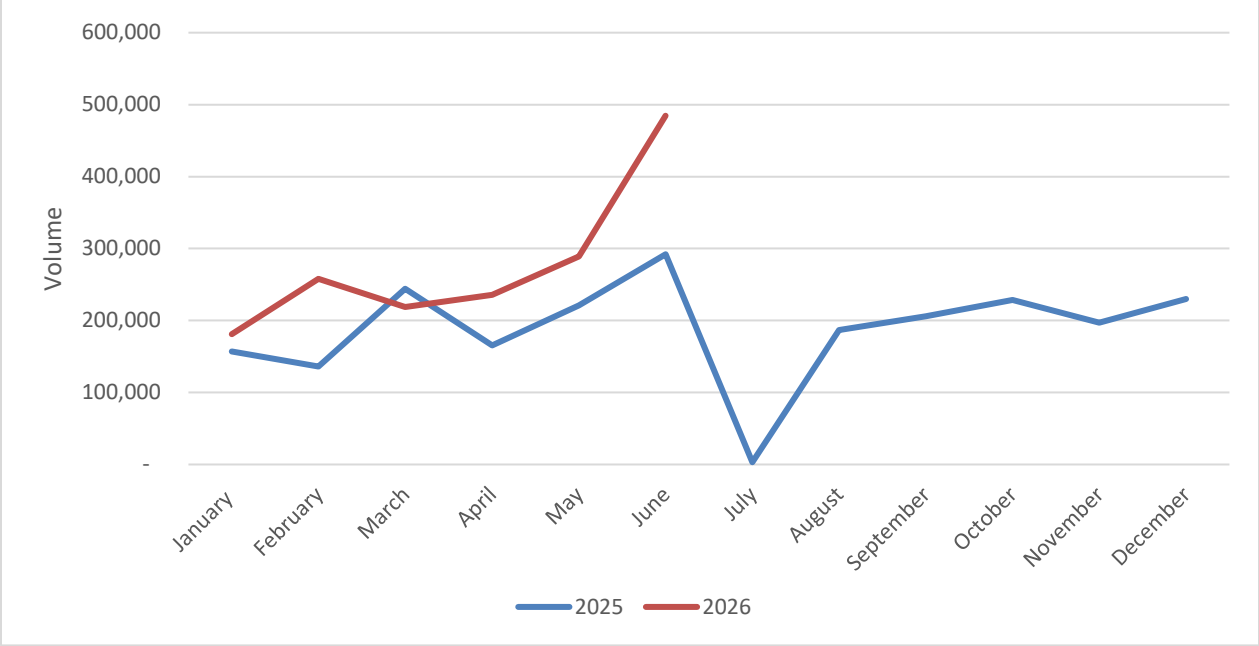
Consumption

Post maintains its forecast for Kenya's domestic rice consumption at 970,000 MT, sustained by evolving dietary habits. Once reserved primarily for special occasions or holiday meals, rice has steadily transitioned into a daily staple for many Kenyan households. The sustained demand is also heavily fueled by rapid urbanization and the fast-paced lifestyle of city dwellers, who increasingly favor rice over traditional staples like maize and wheat due to its convenience and quick preparation time.

Trade

To fulfill the perennial structural deficit, Post retains its earlier imports forecast of 750,000 MT of rice. Kenyan traders are expected to capitalize on a duty-free import window that runs until November 30, 2026. Imports are expected to come from traditional sources in Asia including Pakistan, India, and Thailand.

Figure 8: Kenya Rice Imports Trends



Source: Trade Data Monitor

Attachments:

No Attachments.