



EAST AFRICA GRAIN MARKETS AND TRADE

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Highlights

In Eastern Africa, staple grain prices were stable for the second consecutive month in February and were around their year earlier levels after declining late last year with the 2017 harvests

Burundi: Carry forward stocks from 2017C crop and inbound 2018A harvest eased the pressure of demand on the grains. Currently, the country has minimal household food stress resulting to an increase in availability of commodity.

Kenya: Market prices have eased with stocks reported to be sufficient in the markets. In February, cross-border trade from Uganda reduced by 35.97%.

Tanzania: Inbounding stocks from the second minor season have pushed prices downwards for grain staples in North Eastern markets. Prices are atypically low compared to seasonal trends.

Uganda: Stocks realized from the south/second season are diminishing with regional demand remaining strong. Therefore, prices are expected to increase marginally in the coming month.

Rwanda: New 2018A stocks have pushed prices of grain staples downward, therefore, enhancing food security in the country. Demand for staples from neighboring Uganda and Tanzania has gone down resulting in reduced cross-border trade, however; trade is expected to increase next month going by long-term seasonal trends

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1.0 Markets

In Burundi and Rwanda, the price of grain staples has decreased seasonally with the improved supply of commodities in the markets resulting from the first season harvest. Prices increased marginally in Ugandan markets as a result of regional demand coupled with diminishing stocks. In Kampala, maize price increased by 6.22% (USD 22/MT) with the trend expected to continue in the coming month. In Tanzania, the price of maize was depressed due to the spillover effects of trade ban lifted late last year. With the opening up of trade, the window of opportunity to earn more from the surplus passed as the ban was reversed at a time when deficit countries in the region were harvesting. Therefore, stocks were held for an extended period and with regional demand declining at the start of the year, prices in the wholesale markets were uncharacteristically low following eased demand. Demand for wheat

Table 1: Wholesale prices in East Africa (USD/MT).

Commodity	Location	Jan 2018	Feb 2018	% change	
Maize	Nairobi	394	366	-28(-7.11%)	▼
	Kampala	193	205	12(6.22%)	▲
	Dar es Sal.	301	281	-20(-6.64%)	▼
	Kigali	242	222	-20(-8.26%)	▼
	Bujumbura	457	459	2(0.44%)	▲
Rice	Nairobi	1726	1755	29(1.68%)	▲
	Kampala	926	968	42(4.54%)	▲
	Mulindi-Kigali	895	896	1(0.11%)	▲
	Bujumbura	1139	973	-166(-14.57%)	▼
Red Sorghum	Nairobi	710	689	-21(-2.96%)	▼
	Kampala	247	261	14(5.67%)	▲
	Dar es Sal.	358	357	-1(-0.28%)	▼
	Mulindi-Kigali	386	355	-31(-8.03%)	▼
	Bujumbura	638	605	-33(-5.17%)	▼
Wheat	Nairobi	650	657	7(1.08%)	▲
	Dar es Sal.	551	535	-16(-2.9%)	▼
	Mulindi-Kigali	552	567	15(2.72%)	▲
	Bujumbura	894	882	-12(-1.34%)	▼
Mixed beans	Nairobi	720	701	-19(-2.64%)	▼
	Kampala	555	498	-57(-10.27%)	▼
	Dar es Sal.	778	678	-100(-12.85%)	▼
	Mulindi-Kigali	404	478	74(18.32%)	▲
	Bujumbura	429	407	-22(-5.13%)	▼

remained relatively constant with minimum volatility observed in the monitored markets. In March, prices are expected to be relatively stable for primary staples (Maize, sorghum, beans, and rice).

1.1 Informal Cross-Border Trade

A general decline in cross-border activity was observed in February as maize from Uganda to Kenya dropped massively by 35.9% (16,547.7 MT); compared to last year, the volumes in February were higher by 200%, and this was occasioned by an above-average performance of the second season in the bimodal zones of Uganda. Stocks in Uganda have diminished progressively since the onset of harvest in December last year, therefore, volumes traded are expected to decline in March. Trade from Tanzania to Kenya decreased by 26% (1684 MT) occasioned by depressed

Table 2: Informal Cross Border trade by source and destination country in MT from EAGC RATIN monitored Borders

Commodity	Source	Destination	Jan 2018	Feb 2018	% Change
Maize	Uganda	Rwanda	6,931.1	6,682	-3.6%
	Uganda	Kenya	46,010.03	29,462.31	-36.0%
	Tanzania	Kenya	6294	4610	-26.8%
	Rwanda	DRC	1437.5	1760	22.4%
	Zambia	Rwanda	-	1837	
	Zambia	Tanzania	-	192	
	Zambia	Tanzania	2501	4776	91%
Beans	Uganda	DRC	403.6	-	
	Rwanda	Uganda	4,855.2	2,461.8	-49.3%
	Uganda	Rwanda	-	502.4	
	Uganda	Kenya	9,037.81	562.4	-93.8%
	Uganda	Tanzania	-	99	
	Rwanda	DRC	578.6	722.2	24.8%
	Tanzania	Zambia	322	582	80.7%
Millet	Uganda	Kenya	6,568.62	2,037.94	-69.0%
	Tanzania	Kenya	34	80	135.3%
	Uganda	Rwanda	1.2	0.6	-50.0%
	Zambia	Tanzania	66	126	90.9%
Wheat	Rwanda	DRC	289	232.5	-19.6%
	DRC	Rwanda	48.3	4.89	-7.1%
	Kenya	Rwanda	2,420.8	2,180.5	-9.9%
Rice	Tanzania	Rwanda	3,612.4	3,197.3	-11.5%
	Tanzania	Uganda	1.8	502	27789%
	Rwanda	DRC	1234	-	
	Tanzania	Zambia	348	828	137.9%
	Tanzania	Kenya	87	48	-44.8%
	DRC	Uganda	28.81	26.018	-9.7%
Red Sorg.	Uganda	Kenya	3,173.68	1,637.65	-48.4%
	Uganda	Rwanda	4,428.3	5,284.5	19.3%
	Tanzania	Uganda	474	-	
	Tanzania	Kenya	140	548	291.4%

supplies to wholesale markets such as Kibaigwa. Traders reported low stocks from aggregator markets and in February, the market was not vibrant as there were fewer traders from Kenya and Rwanda. Besides, field reports from Isibania border indicated there were fewer traders from western Kenya heading to Tarime market to source for grain staples. The decline in cross-border trade in Tanzania is expected to persist as the country is in the midst of the lean period.

Sorghum trade from Uganda to Rwanda increased by 19.3% (856.2 MT) as demand was reported to be secure in Rwanda. In Kenya trade declined as stocks of maize stocks were still sufficient.

Tanzania remains the predominant regional supplier of rice, however, February being an off-season for the commodity, sup-

ply was tightened in the source markets in the southern region. Demand for Tanzania's fragrant rice varieties remains high in Rwanda's urban markets, however, ongoing harvest in Eastern Rwagamana region has increased local supply. Informal imports into Rwanda through Rusumo and Gatuna went down by 11.49% (415.1MT) and a decline in traded volumes is expected in March.

Wheat exports to Rwanda from Kenya through Gatuna went down by 9.9% (240.3 MT) with new stocks from Northern Province meeting local demand. In Rubavu, volumes traded went down by 7% with traders lamenting the ever-changing municipal laws in the frontier market of Goma in the DRC. In Rusizi II, trade between DRC and Rwanda remained constricted by the instability of the Eastern region.

Trade of Beans has eased with mixed beans volumes from Uganda to Kenya decreasing considerably by 93.78% (8475.33 MT). Reports from the markets indicate Kenyan traders have sufficient stocks to last until the mid second quarter. Trade between Rwanda and Uganda eased by 49.3% (2393.4 MT) with demand reported to have gone down in the southwestern region of Uganda, reverse flow of the commodity is expected in late March as Ugandan traders will be releasing the hoarded stocks once demand peaks seasonally in March.

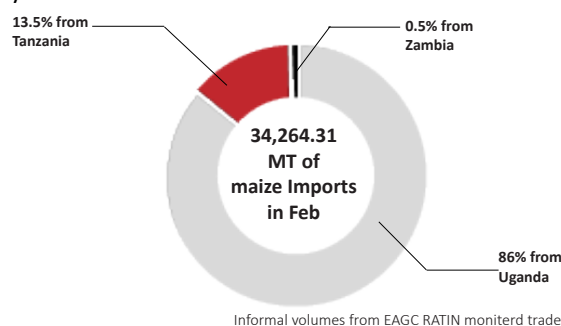
2.0 East African Grain Markets

2.1 Kenya

Overview

Market prices have eased with stocks reported to be sufficient in most markets. In February, trade slowed down typically with volumes crossing from Uganda declining by 35.97%. This was occasioned by Government downscaling intakes into the strategic food reserves resulting to farmers releasing stocks to the markets.

Currently, traders are sourcing locally as farmers are releasing last season stocks as the second season stocks from Uganda are diminishing. Trade from Tanzania decreased by 26.76% as the country is in the lean season.



In the Eastern region, price of maize in Makueni remained relatively stable at Kes 29/Kg in Makueni whereas, in Machakos market, maize was trading at Kes 30/Kg. Reports indicate traders were sourcing stocks from Western Kenya, North Rift, and Uganda owing to the dismal performance of short rains. A recent market linkages meeting with farmer-based organizations in Mwingi Central and Mwingi North under the KCEP-CRAL programme established that maize and pulses production from the

EAGC is the implementing partner under component 2 of the Kenya Cereals Enhance Programme- Climate Resilient Agricultural Livelihood (Window) (KCEP-CRAL) which entails facilitating market linkages for the farmer based organization in grain production.


Table 3: Wholesale prices of grains in selected markets in Kenya (Kes/Kg).

	Nairobi		Mombasa		Eldoret		Nakuru	
	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.
Maize	36	1(2.9%) ▲	31	-2(-6.1%) ▼	29	0(0%) ▬	27	0(0%) ▬
Imp. rice	80	1(1.3%) ▲	78	-2(-2.5%) ▼	124	-4(-3.2%) ▼	82	11(15.5%) ▲
Red Beans	79	-3(-3.7%) ▼	56	-3(-3%) ▼	89	-3(-3.4%) ▼		
Red Sorghum	69	-5(-6.8%) ▼	39	-6(-13.3%) ▼	47	16(12.8%) ▲	45	2(4.7%) ▲
Millet	72	6(9.1%) ▲	100	0(0.0%) ▬	109	-1(-0.9%) ▼	80	-6(-7.0%) ▼
Green Grams	109	11(11.2%) ▲	74	-6(-7.5%) ▬	130	0(0%) ▬	105	2(1.9%) ▲

	Kisumu		Meru		Makueni	
	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.
Maize	35	0(0%) ▬	24	-2(-6.1%) ▼	29	0(0%) ▬
Imp. rice	123	19(18.3%) ▲				
Red Beans	70	0(0%) ▬	61	1(1.7%) ▲	80	4(5.3%) ▲
Red Sorghum	37	2(5.7%) ▲	40	-9(-18.4%) ▼		
Millet	92	3(3.4%) ▲	68	-15(-6.8%) ▼		
Green Grams	82	-4(-4.7%) ▼	67	1(1.5%) ▲	70	-5(-6.7%) ▼

short rain season was adversely affected by poor rainfall and fall armyworm infestation in Embu and Mwingi. Therefore, prices are expected to remain elevated as the market in the region will be sourcing externally.

In Eldoret, prices have remained stable since the beginning of the year with reports indicating below average production as a result of fall armyworm infestation in Mosoriot, Jua Kali, and Moiben; production was further impacted by increased rainfall during harvest period leading to losses at harvest phase. Compared to the same period last year, there was 25.6% drop in prices and a 2.8% decrease from the five-year average. Stocks in Uasin Gishu are expected to diminish earlier than usual with projected wholesale prices ranging between Kes 29-31/Kg in the coming month. In Kisumu and Nakuru, prices remained stable with a marked decrease from last year's prices. In Kisumu, there was a 14% decrease whereas; Nakuru had a 25% decrease with market conditions remaining favorable regarding supply.

 In February, the price of red beans was relatively stable compared to previous month's average. Month on Month change ranged between 5.3% and 3.7%. The most significant gain was observed in Makueni market in the lower eastern region. This year's stocks were severely affected by below average rainfall resulting to massive crop failure in the area.


The price of red beans decreased slightly in Nyamakima by 3.7% (Kes 3/Kg) with stocks sourced from lower eastern and imports from Uganda. However, stocks from source markets in Makueni and Machakos were reported to be of lower quality due to adverse weather conditions during crop development.

In Eldoret, supply from Trans Nzoia, and Elgeyo-Marakwet counties was reported to be depressed due to last season's below average performance, therefore, traders were sourcing the com-

modity from Busia market in Uganda. Prices went down marginally by 3.4% (Kes 5/Kg) with sufficient stocks in the market.

In Mombasa, there was a decrease of 5.1% with traders reporting favorable prices from source markets in Uganda and Tanzania.

In Meru, prices remained relatively stable with short rain supplies improving supplies, however, due to below average performance of the crop, supply will tighten by the end of March necessitating traders to rely on Moyale market for stocks. In Kisumu, prices remained stable for most beans varieties such as red beans, yellow beans, rose-coco, and piriton. The supply of the commodity has been reported to be steady with imports from Uganda and Tanzania easing demand pressure. Prices of locally produced wairimu and saitoti varieties are expected to increase as last season performance was below the long-term average.

 The price of the commodity increased marginally in Nairobi by 1.3% with supply reported to be stable. For the locally produced pishori variety, prices remained high at Kes 176/Kg and were 23.9% higher compared to last year's prices. Prices are expected to remain high until the main harvest season in May in Mwea irrigation scheme. In Mombasa, supply of imported rice remained relatively stable with reports indicating that import prices were on a decline. Pishori remained stable at Kes 170/Kg however, was above last year's prices by 25% (Kes 136/Kg in 2017) with supply reported being depressed supplies therefore, prices are expected to remain elevated.

 Imports from Uganda decreased by 48.4% (826.3MT) affecting supply in most urban markets. Demand for sorghum was reported to be high in Nyamakima market with traders reporting low stocks from lower and upper Eastern aggregation markets. Though prices decreased by 6.8% (Kes 5 4/Kg), they were high compared to last year by 9.7% and were 17.2% higher to the five-year average. In the Kisumu's Kibuye market, a 5.7% gain was recorded occasioned by a decline in demand for the commodity as maize prices

were favorable. Presently, traders are still sourcing the product from eastern markets of Uganda as prices are favorable, for instance, in Busia, sorghum was trading at about Kes 26/Kg.


2.2 Rwanda


Overview

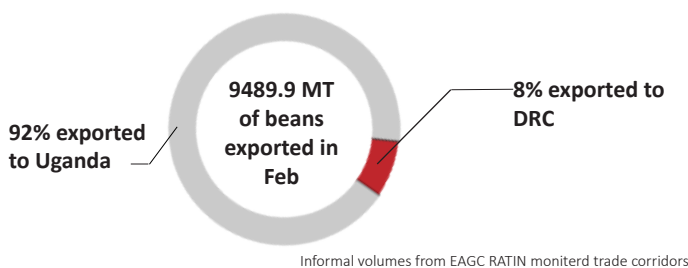
Inbounding stocks from season A has pushed prices downward for most grain staples in the monitored markets. Resulting in reduced cross-border trade activity, however; traders are expected to increase next month going by long-term seasonal trends.

Table 4: Wholesale Prices of Grain in selected markets in Rwanda (Rwf/Kg)

	Ruhengeri		Ruhuha		Kamembe		Mulindi	
	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.
Maize	192	-49(-20.3%) ▼	207	-63(-23.3%) ▼	200	-88(-30.6%) ▼	186	-17(-8.4%) ▼
Rice (Kigoli)	884	24(2.8%) ▲	720	-1(-0.1%) ▼	749	11(1.5%) ▲	754	4(0.5%) ▲
Red Beans	411	-144(-25.9%) ▼	319	-40(-13.6%) ▼	346	-73(-6.0%) ▼	338	-10(-2.9%) ▼
Red Sorghum	350	35(11.1%) ▲	372	-5(-3.9%) ▼			298	-26(-8.0%) ▼
Millet	750	105(16.3%) ▲					477	-17(3.7%) ▼
Wheat							476	-13(2.8%) ▼

 Late last year's 2017C harvest and February's 2018A season harvest eased pressure on demand since the beginning of the year. The demand for maize and maize meal (Kaunga) has gone down as the country is in the midst of a bounty harvest with a wide range of staples on offer. A look at Kigali's consumer markets shows prices have been relatively stable in Kimironko with Mulindi recording a significant decline of 8.75% (Rwf 17/Kg) from last month's average. Regarding quality, maize from Nyagatare region was reported to be better, therefore, attracting better prices compared to grain from Ngoma and Kayonza region. In the eastern market of Gicumbi, the supply of the commodity was stable therefore prices are expected to remain stable in the coming month. In the Northern Musanze district, traders from Uganda have sustained demand therefore prices will remain elevated compared to other monitored markets

 Supply of beans remained stable with sufficient stocks of red, yellow and mixed beans reported in the monitored markets. Prices have dipped seasonally with informal cross-border trade volumes for mixed beans going down by 49.3% (2393.4 MT). According to traders, prices of soya, yellow and red beans is expected to remain stable in the coming month as currently, the quantities received from the 2018A crop is sufficient to meet the immediate demand. In the urban markets, the commodities are sourced from Kayonza and Ngoma.



	Kimironko		Rubavu	
	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.
Maize	408	3(-0.7%) ▼	251	-38(-13.1%) ▼
Rice (Kigoli)	811	-6(-0.7%) ▼		
Red Beans	594	-28(-4.5%) ▼		
Red Sorghum	434	-14(-3.1%) ▼	322	-67(-17.2%) ▼
Millet	851	-24(-2.7%) ▼		
Wheat	537	-13(-2.2%) ▼	605	-83(-12.1%) ▼



 Sorghum and Millet: In the eastern region, the crop is almost ready for harvest consequently, prices have remained elevated but are expected to go down in the coming month. Currently, due to higher prices of sorghum, demand for Millet is on the rise with a 16.3% (Rwf 105/Kg) gain recorded in Ruhengeri market. Sorghum Imports from Uganda increased by 19.3% (856.2 MT) with significant trade occurring through Cyanika border. In the urban markets, high volatility was observed with an 8% decrease observed in Mulindi as traders reported adequate stocks, with prospects from the season 2018A looking good, prices are expected to ease further in March as harvest is underway in sections of the country.



Plate 2: Sorghum crop almost ready for harvest in Eastern province (26th February 2018)

 Harvest of rice is underway in the northern district. Price of the local short (Kigoli) grain variety has remained relatively stable with volatility remaining relatively stable with highs of 2.8%. Demand for Imported Mbeya rice from Tanzania was high in urban

markets. Among the monitored markets, the price was highest in Ruhengeri averaging Ugx 884/Kg with stability recorded from the beginning of the year. Informal flows from Tanzania have decreased by 11.6% (415.1 MT) with the trend expected to persist till the next harvest in May

 Compared to last month, increased volatility was observed with a significant gain of 12.3% (Ugx 81/Kg) noted in Masindi market. In Kampala's Kisenyi market, prices went up by 5.7% (Ugx 40/Kg) as demand from largescale traders remained strong in February with diminishing stocks at the source markets.

2.3 Uganda

Overview

Demand for beans has eased from neighboring countries leading to a significant drop in prices in the monitored markets. Stocks realized in the south/second season have shored up supply therefore, prices will remain relatively stable in the coming month.

In Masindi market, traders were majorly from Busia and Kisenyi markets. Good quality grain was realized this season in the western region with farm gate prices ranging between Ugx 650/Kg and Ugx 720/Kg. Seed companies were purchasing from contracted farmers with open pollinated variety trading at about Ugx 800/Kg whereas hybrid varieties were trading at Ugx 1,600/Kg. In Mbale, prices remained relatively stable with a marginal 0.8% (Ugx 6/Kg) decline noted in February as the commodity was trad-


Table 5: Wholesale Prices of Grains in selected markets in Uganda (Ugx/Kg)

	Kampala			Lira			Busia			Gulu		
	Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Dec.	
Maize	741	40(5.7%)	▲	697	1(0.1%)	▲	785	12(1.6%)	▲	726	31(4.5%)	▲
Rice	3500	-42(-1.2%)	▼	3,400	-155(-4.4%)	▼				2,605	91(3.6%)	▲
Mixed Beans	1800	816(-31.2%)	▲	1,630	186(-23.2%)	▲	1,565	261(-14.3%)	▼			
Sorghum	942	46(5.1%)	▲	675	26(4.0%)	▲	949	86(10%)	▲	790	55(7.5%)	▲
Millet	1,814	14(0.8%)	▲	1,730	171(9.6%)	▲	1,802	33(-1.8%)	▼	1,624	-33(-2.0%)	▼
Soya Beans	1,392	62(4.7%)	▲	1,363	68(5.3%)	▲	1,419	18(1.3%)	▲	1,165	166(6.0%)	▲


	Tororo			Kasese			Masindi		
	Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Prices	
Maize	716	-13(-1.8%)	▲	725	160(-18.1%)	▲	740	81(12.3%)	▲
Rice	2,505	-166(-6.2%)	▼	3,661	312(-8.5%)	▲	3,060	123(4.2%)	▼
Mixed Beans	1,594	277(-14.8%)	▲	1,858	460(-19.8%)	▲	1,930	-647(-15.3%)	▲
Red Sorghum	906	57(6.7%)	▲	1,449	89(6.5%)	▼	1,450	68(4.9%)	▼
Millet	1,819	104(7.4%)	▲	2,298	84(3.8%)	▲	2,215	96(4.5%)	▼
Soya Beans	1,369	35(5.1%)	▲	2,022	610(-23.2%)	▲	1,417	-19(-1.3%)	▼

ing at Ugx 700/Kg. Aggregators in Mubende and Sebei markets were selling the commodity at Ugx 650/Kg; In Kiboga and Busoga, aggregators were selling at Ugx 700/Kg with the grain reported to be of good quality. Maize meal was trading at about Ugx 1400/Kg whereas bran was sold at 400/Kg with demand for the latter reported to be low.

The cross-border trade activity decreased by 35.97% (16,547.47 MT) from Uganda to Kenya with reports indicating diminishing stocks in the source markets in Eastern region. Cross-border trade to Rwanda from Uganda eased as the country was in the midst of the harvest season in February with trade expected to peak sometime in late March. However, prices will increase as stocks have decreased progressively with sustained demand from Kenya.


 The price of beans decreased significantly in the monitored markets with field reports indicating lower demand pressure from markets in Rwanda and adequate stocks in Kenya. Traders from Busia market were sourcing the commodity from Rwanda to sustain strong regional demand from the markets in Kenya. In the

DRC, demand for yellow beans was high with Mpondwe border recording an increase of 22.43% (322.5 MT), as the commodity was primarily sourced from Mubende and Angole in central and western regions respectively. Supply was adequate in the market reflected by easing of prices by 9.3% (Ugx 460/Kg) in Kasese. In the northern markets of Gulu and Lira, supply from the western region was reported to be adequate with demand increasing marginally towards the end of the month. In March, prices are expected to remain relatively stable as stocks are still adequate. In the urban markets, demand for yellow and Nambale short K132 was reported to be high with supply tightening in the third week of February. Prices declined by 31.2% (Ugx 81/Kg) in Kisenyi as old stocks eased demand pressure. Stocking from the second season is almost complete with current stocks expected to sustain demand until late May though prices were noted to increase marginally since Mid-February.

 With relaxing of export bans late last year in Tanzania, trade has resumed with an increase in activity noted. As last month, volumes traded increased by 500.2 MT. Demand for the Super variety

from Tanzania is high in all the monitored markets. In the north, milled rice from Ahero, Kenya attracted fair prices compared to other rice varieties. A slight decline in prices was observed in Kisenyi with prices easing by 1.2% (Ugx 4/Kg). Supply was steady in February however, locally sourced stocks are expected to decline seasonally in the coming month with much of the demand met by imports from outside the EAC.

Supply from Bugiri and Butaleja districts has led to lower prices in the eastern markets of Mbale, Tororo and the northern markets of Lira and Gulu compared to the rest of the country due to the proximity of the markets to the production zones. Stable supply is expected in the coming month, as current global markets supply is favorable.

 **Red Sorghum and Millet:** The demand for sorghum and millet was low in Busia due to adequate supplies of maize in the market. Traders in Busia are currently stocking maize as prices are better given the two commodities are substitutes for maize. Masindi market had the highest price of sorghum at Ugx 1450/Kg though

2.4 Tanzania


Overview

The Vuli (Secondary Season) harvest was underway in the coastal, northern, and northeastern bi-modal rainfall areas; the season accounts for 15-20% of national production.

According to FAO GIEWS, the season performance in Arusha, Kilimanjaro, Tanga and Manyara region was 70% below average how-

Table 6: Wholesale Prices of Grains in selected markets in Tanzania(Tsh/Kg)

	Dar es Salaam			Iringa			Mbeya			Arusha			Dodoma		
	Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Dec.		Feb Prices	% change from Dec.	
Maize	630	-42(-6.25%) ▼		458	58(14.5%) ▲		341	-11(-2.6%) ▼		652	103(18.76%) ▲		381	-41(-9.72%) ▼	
Mbeya Rice	2,200	0(0%) ▬		1,990	7(0.4%) ▲		1,900	3(0.7%) ▲		2,000	5(0.25%) ▲				
Soya Beans	2,000	200(11.11%) ▲		1,800	-1(-0.06%) ▼		1,485	-49(-3.2%) ▼		2,061	565(37.77%) ▲				
Red Sorghum	800	0(0.0%) ▬								1,197	-153(-11.33%) ▼		433	83(23.71%) ▲	
Yellow Beans	2,147	-53(-2.41%) ▼		1,941	13(0.67%) ▲		1,750	-50(-2.8%) ▼		2,089	-6(-0.29%) ▼				
Pigeon Peas	798	2(0.25%) ▲		1,370	-26(-1.86%) ▼		730	2(0.27%) ▲		500	3(0.60%) ▲		337	4(1.2%) ▲	
Wheat	1,200	-31(-2.52%) ▼		1,400	72(5.42%) ▲		850	0(0%) ▬		1,200	3(0.25%) ▲				

 **Exports of maize to Kenya** decreased by 26.7% (1684 MT) as the country is in the midst of the lean season. The 2017/18 vuli harvest season is over with reports indicating that the northern region experienced below average production resulting in elevated prices of maize in the area. In Arusha, prices were on an uptrend with supply from Kilimanjaro, and Manyara complemented by inflows from the lake zone. In February, the wholesale price was Tsh 652/Kg, an 18.8% increase from the previous months average. Compared to last year, prices were lower by 31.4%, and are expected to remain depressed in March compared to the previous year.

In Dar es Salaam's Tandale market. Traders reported adequate supplies from the southern region with imports from Zambia standing at 4776 MT through Tunduma border. Also, new stocks from the Tanga region were traded in the market. Therefore, demand eased pushing prices down by 6.3% (Tsh 42/Kg). Compared

this was 10.2% lower than last year's prices. Demand from Kiryadongo and other northern districts was reported to be high with much of the area under stress of food supply.

The demand for sorghum from Rwanda was strong as it was the lead importer of the commodity through the monitored corridors. An increase of 19.3% (856.2 MT) was realized in February as field reports indicated there was low supply of the product in the Rwandan monitored markets. The demand of the commodity is expected to ease in March as new stocks are expected in March; however, much of the commodity produced is at a subsistence level. This season, millet production from Arua, Soroti and Lira was above average with the grain reported being of good quality compared to last year as farm gate prices reported to be competitive. Traders in the western region were stocking the commodity with demand in the eastern markets sustained by Kenya traders. On average, about 70MT of millet was traded on a daily basis through Busia border with prices expected to remain relatively stable in the coming month.

ever, the lake and coastal zones received well-distributed rainfall-therefore, production of the crop was above average.

Compared to last year February, prices of most commodities are lower with an increase in prices expected in the coming month.

Exports from Tanzania have declined seasonally since the beginning of the year.

to last year, prices have gone down by 44% and are 4% higher than the five-year average. In Iringa, prices increased atypically by 14.5% (Tsh 58/Kg) with reports indicating that farmers releasing old stocks in anticipation of the new crop in April; field reports indicate the crop development may be impacted by dry spells experienced in early in the year therefore stocks in the coming season are expected to be lower. Farm gate prices in Iringa ranged between Tsh 330-350/Kg in February but expected to go higher approaching the harvest.

In Dodoma, traders were reported to have been sourcing for business within the region as few foreign traders came to buy the commodity in the market. The market is yet to recover from the trade ban imposed on exports that was in place for the better part of last year. Prices decreased by 9.7% (Tsh 41/Kg) with demand easing as the region (Uganda, Kenya, and Rwanda) had an adequate supply in February.

In Dar es Salaam, the supply of yellow and red beans was stable in February with stocks primarily sourced from southern region. In Iringa, the prices of soya beans remained stable since the beginning of the year as stocks were adequate. In the southern region, stocks were reported to be sufficient as exports to Zambia increased. A decrease in prices in Momba district by USD 0.37/Kg (Trading at USD 45/100 Kg in February) has led to Zambian traders sourcing the commodity from the Tunduma frontier market. Consequently, an increase of 80.7% (260 MT) in trade was noted. Prices are expected to remain relatively stable in the coming month.

Last year, production of pigeon peas was favorable as demand was sustained by the international market with the primary off-taker being India. However, India imposed a ban on imports since August last year therefore impacting on trade negatively. Currently, prices have gone down as the subsector is in a dilemma as stocks are on all-time high as the commodity is not widely consumed in the country. Therefore due to low demand, prices have gone down significantly in the monitored markets with Iringa recording an 18% (Tsh 314/Kg) decrease compared to last year. Therefore, prices are projected to remain low until international markets open up or domestic consumption is promoted.

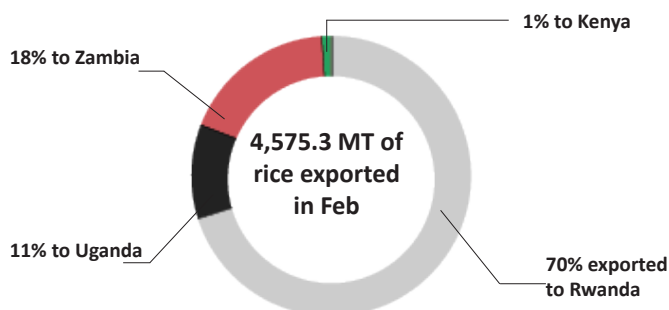
Burundi

Overview

Prices of grain staples were on a downtrend in all the monitored markets as a result of inbound stocks from the season A harvest.

Prices declined seasonally in the monitored markets as the country is coming out of the harvest season therefore, the replenished stocks have eased pressure on demand. In Bujumbura, prices were down by 6.7% (Bif 61/Kg) and compared to last year, prices are lower by 45% though above the long-term average by 10.5%. In Ngozi market, prices were at Bif 853/Kg whereas, in Gitega, there was a 19.2% decrease from the previous month's average with stocks reported to be adequate in the market. Currently, traders are stocking with prices expected to remain stable

In February, stocks were reported to be adequate in the markets as prices were on a decline for all varieties. A decline of 34.8% (Bif 653/Kg) was recorded in Gitega market for yellow beans with demand remaining high for the commodity and in Bujumbura and Ngozi, prices eased by 29.43% and 20.8% respectively. In February, field reports indicate stocks reaching the markets have declined slightly and the trend is expected to persist as harvest ended late January therefore, prices are expected to increase in the coming month.



Informal volumes from EAGC RATIN monitored trade corridors

In February, prices were somewhat at the same level as last year as usually prices are on an upward trend at this time of the year. However, the ban imposed for by Tanzania for the better part of last year led to increased domestic stocks with traders and farmers missing out on temporal arbitrage opportunity in the lean period. In February, imports from Tanzania through Mutukula border stood at 502 MT as demand was low. Among the monitored borders, demand was highest from Rwanda with 3197.3 MT traded however, this was a 11.5% (415.1 MT) decrease from last month's volumes. Prices are expected to remain relatively stable in the coming month.

With harvest of sorghum completed in February, prices decreased in Ngozi and Bujumbura by 26.4% (Bif 297/Kg) and 5% (Bif 56/Kg) respectively. Prices are expected to decrease in March as demand remains low due to the adequate supply of maize in the markets.



Plate 2: Rice arrivals from Tanzania in Gitega market

Table 7: Wholesale Prices of Grains in selected markets in Burundi (Bif/Kg)

	Ngozi		Gitega		Bujumbura	
	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.	Feb Prices	% change from Dec.
Maize	853	-61(-6.7%) ▼	775	-184(-19.2%) ▼	829	-26(-3.14%) ▼
Rice	1,901	-540(39.7%) ▼	1,725	-130(-7.0%) ▼	1,700	-289(-14.53%) ▼
Red Sorghum	830	-297(-26.4%) ▼	1,050	36(3.6%) ▼	1,058	-56(-5.03%) ▼
Wheat	1,516	333(-18.0%) ▲	1,335	-503(-27.4%) ▲	1,542	-455(-22.78%) ▲
Yellow Beans	1,489	-310(-20.8%) ▲	1,225	653(-34.8%) ▲	1,211	-505(-29.4%) ▲
Soya Beans	1,160	-282(-19.6%) ▲	1,160	509(-30.5%) ▲	1,629	-441(-21.3%) ▲

Figure 1: Markets and Borders monitored by EAGC RATIN

