



## EAST AFRICA GRAIN MARKETS AND TRADE

April Report, Issued on 9th May 2018.

Issue no. 0005

### Highlights

**In Eastern Africa, staple grain prices were relatively stable in April and were below their year earlier levels and also, below the five year average.**

**Burundi:** Stocks were adequate however, declined marginally compared to the previous month. Prices expected to gain in the coming month for most grain staples.

**Kenya:** Enhance cross-border trade reported in April with relative stability observed for most grain commodities. Regional supply is adequate and no significant change expected in May.

**Tanzania:** Prices were on a down ward trend in April with improved supply of grain staples. Harvest from the Msimu crop expected to ease regional demand pressure in May.

**Uganda:** Supply tightened marginally in April and prices are expected to go up seasonally in May.

**Rwanda:** Significant decrease in export of dry beans in April. Prices are expected to go up in May as stocks diminish seasonally.

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

Commodity	Location	Mar 2018	Apr 2018	% change	
Maize	Nairobi	330	313	(-5.2%)	▼
	Kampala	191	194	(1.6%)	▲
	Dar es Sal.	267	266	(-0.4%)	▼
	Kigali	212	198	(-6.6%)	▼
	Bujumbura	456	432	(-5.3%)	▼
Rice	Kampala	963	1,023	(6.2%)	▲
	Kigali	900	921	(2.3%)	▲
	Bujumbura	996	895	(-10.1%)	▼
Red Sorghum	Nairobi	492	474	(-3.7%)	▼
	Kampala	244	239	(-2.0%)	▼
	Dar es Sal.	356	354	(-0.6%)	▼
	Kigali	396	389	(-1.8%)	▼
	Bujumbura	583	557	(-4.5%)	▼
Wheat	Dar es Sal.	551	535	(-3.3%)	▼
	Mulindi-Kigali	552	567	(2.1%)	▲
	Bujumbura	894	882	(-0.9%)	▼
Mixed Beans	Kampala	555	498	(5.7%)	▲
	Dar es Sal.	778	678	(-0.4%)	▼
	Mulindi-Kigali	404	478	(4.5%)	▲
	Bujumbura	429	407	(-3.1%)	▼

### Contents

1.0 Markets .....	1
1.1 Informal Cross Border Trade.....	1
2.0 East African Grain Markets.....	2
2.1 Kenya.....	2
2.2 Rwanda.....	4
2.3 Uganda.....	6
2.4 Tanzania.....	7
2.4 Burundi.....	9
3.0 Crop Season Review.....	10

### 1.0 Markets

In April prices were still below last year's record high levels in the monitored markets. In Burundi and Rwanda, domestic stocks eased pressure on demand as a decline in prices was observed. Supply of rice remained tightened in the monitored markets with demand mainly met by supplies from the global market. Maize prices continued on a downward trend with Kampala recording the lowest price in the region. Beans prices gained marginally with stocks harvested early in the year from Uganda, Rwanda and Burundi declining seasonally. The supply of sorghum was reported to be adequate in April with marginal decline posted in the monitored markets. Wheat was primarily sourced from the global market as domestic stocks were on a decline.

### 1.1 Informal Cross-Border Trade

The demand for maize remains strong in Kenya with positive values recorded from Uganda and Tanzania. Stocks in Tanzania are reported to be sufficient due to policy-induced surpluses. From Uganda, there was a 69.4% increase from last month's quantities. Though domestic supply was reported to be adequate in Kenya, lower prices sustained informal trade as the commodity was trading at about USD 200/MT in Uganda's easterly markets compared to Kenya USD 275/MT in the country's breadbasket (Northern Rift Valley). However, there was record harvest from the 2017 crop, trade of maize between Zambia and Tanzania has gone down considerably as stocks have diminished seasonally. New stocks from the main season are expected in Zambia and Tanzania with seasonal performance reported to be good. Therefore, cross-border trade will ease between the two countries as

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

Commodity	Source	Destination	Mar 2018	Apr 2018	% Change
Maize	Uganda	Rwanda	6,508.9	6,379.4	-2.0% ▼
	Uganda	Kenya	13,309.1	22,545.2	69.4% ▲
	Tanzania	Kenya	2,292	2,851	24.4% ▲
	Rwanda	DRC	1,573.69	1,553.8	-1.3% ▼
	Zambia	Tanzania	228	66	-71.1% ▼
Beans	Uganda	DRC	656.78	548.72	-16.5% ▼
	Rwanda	Uganda	7,532.2	4,968.6	-34.0% ▼
	Uganda	Rwanda	653.5	507.6	-22.3% ▼
	Uganda	Kenya	8,962.6	10,874.3	21.3% ▲
	Rwanda	DRC	1,056.9	1,243.9	17.7% ▲
	Tanzania	Zambia	3,046	3,155	3.6% ▲
Millet	Uganda	Kenya	1,758.15	4,901.62	178.8% ▲
	Tanzania	Kenya	118	95	-19.5% ▼
	Zambia	Tanzania	28	94	236% ▲
Wheat	DRC	Rwanda	68.26	23.26	-65.9% ▼
	Kenya	Rwanda	2,225.7	2,149.7	-3.4% ▼
Rice	Tanzania	Rwanda	3,173.2	3,031.2	-4.5% ▼
	Tanzania	Uganda	350.3	1,835.1	423.9% ▲
	Rwanda	DRC	1,189	1,384	16.4% ▲
	Tanzania	Zambia	771	513	-33.5% ▼
	Tanzania	Kenya	36	65	80.6% ▼
	DRC	Uganda	78.94	24.63	-68.8% ▼
Red Sorg.	Uganda	Kenya	1,037.94	1,731.4	66.8% ▲
	Uganda	Rwanda	4,166.9	3,796	-8.9% ▼
	Tanzania	Kenya	311.5	311	-0.2% ▼
G.Nuts	Uganda	Rwanda	1,758.	1,085.2	-38.3% ▼
	Rwanda	DRC	8.126	9.46	16.4% ▲
	Tanzania	Uganda	3,603	2,191	-39.2% ▼
	Tanzania	Kenya	494	721	46% ▲

both will be experiencing surplus. Trade of beans between Rwanda and Uganda went down seasonally by 34% with field reports indicating tightened supply of the commodity. A significant reverse in the trend is expected in the coming month with Uganda plugging the deficits. Trade between Tanzania and Rwanda and in extension, other EAC member countries is expected to go up as Tanzania will be harvesting Maize, Sorghum, and Rice in May. In April, Tanzania accounted for 79% of the 6852.93MT of rice traded through the RATIN monitored trade corridors. Rwanda imported 3031.2MT though this was a marginal decrease from the previous month's volumes. There was a significant decrease in trade between Zambia and Tanzania as a 33% decrease was posted. Field reports indicate tightened supply with regional demand for Tanzanian rice varieties from Mbeya, Morogoro and Kahama was strong. In May, supplies will shore up with Msimu crop harvest, therefore regional supply is expected to improve. De-

mand for Tanzanian rice from Kenya is expected to ease as Mwea irrigation scheme crop will be harvested in May.

Within the region, no country is currently harvesting sorghum though stocks realized from the minor seasons in Rwanda, Burundi, and Uganda have sustained the regional supply. Imports from Uganda into Kenya increased significantly (66%) indicative of strong demand ; an upward trend is expected in May as domestic stocks in Kenya will diminish. Trade between Rwanda and Tanzania was relatively stable with demand sustained by deficits occasioned by the government policy to focus on a number of grain staples under the crop intensification program of which, sorghum is not considered in the program.

The trade of beans decreased from Rwanda into Uganda with field reports indicating a decrease in supply of the commodity. In the eastern and northern provinces which are key regional supply, prices increased by up to 12% in the monitored markets. Demand from Kenya increased significantly in the fourth week of the month as traders were reported to be stocking for schools that were opening in May. There was a 21.3% increase in trade with red beans (NABE 3/Wairimu) as the most preferred variety. In the western trade corridor of Uganda, demand for beans eased by 16.5% as some sections of DRC were reported to be in the harvest phase. Much of the commodity is demanded in the humanitarian settlement in Eastern Congo.

## 2.0 East African Grain Markets

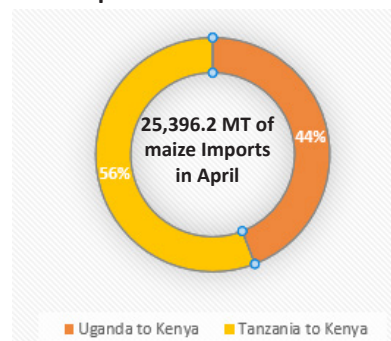
### 2.1 Kenya

#### Overview

- Trade with Uganda and Tanzania intensified in April.
- Price were relatively stable for most of the staple grains.
- Surplus of maize reported in the production region. Farmers could not find competitive prices.

In April, trade with Uganda increased with about 22,545.2MT of maize from Uganda and an additional 2851MT from Tanzania through the monitored trade corridors. This was a significant increase from previous month's volumes. Prices were significantly lower compared to last year's levels with Nakuru posting lower prices than the five-year average. In the production region of Nakuru, field reports indicated that farmers were facing challenges getting off takers of last season's harvest. With prices on a downward trend, many were selling at a loss. Latest report indicated that farm gate prices had gone as low as Kes 1500 in some sections of the region. This is indicative that there is a surplus in the

**Figure 1: Imports of Maize**



Informal volumes from EAGC RATIN monitored trade corridors

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

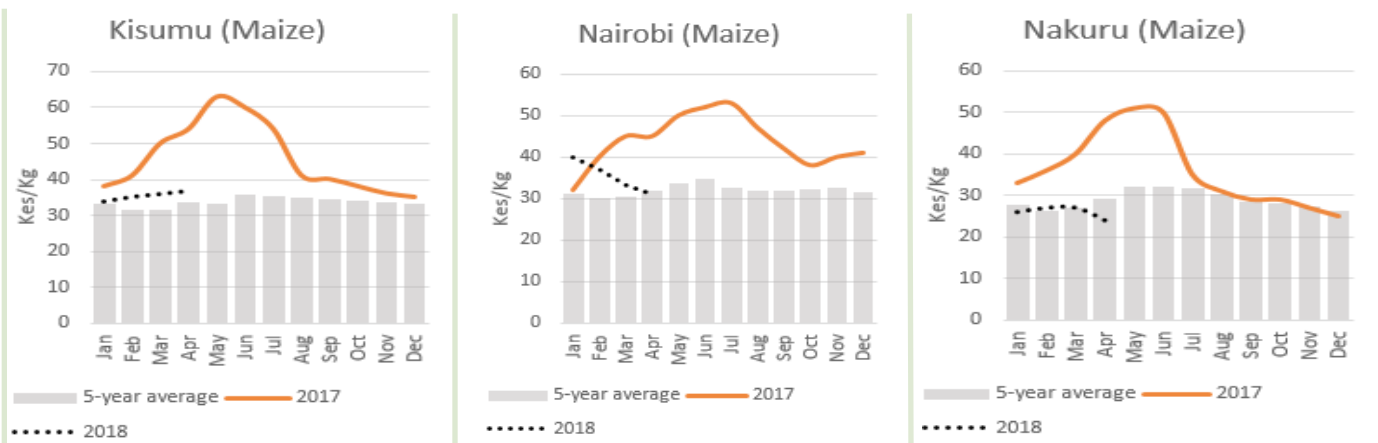
	Nairobi			Mombasa			Eldoret		Nakuru	
	Apr Prices	change from Mar.		Apr Prices	change from Mar.		Apr-Prices	change from Mar	Apr-Prices	change from Mar.
<b>Maize</b>	31	-3(-6.1%) ▼		28	-1(-3.4%) ▼		29	-1(-3.3%) ▼	27	-3(-11.1%) ▼
<b>Imp. rice</b>	80	1(1.3%) ▲		78	0(0%) ▬		117	1(0.9%) ▲	108	36(31.7%) ▲
<b>Red Beans</b>	63	-14(-18.3%) ▼		60	2(3.4%) ▲		81	-6(-6.9%) ▼	63	-8(11.3%) ▼
<b>Red Sorghum</b>	47	-17(-6.8%) ▼		32	-3(-8.6%) ▼		47	-1(-2.1%) ▲	41	-3(-6.8%) ▼
<b>Millet</b>	91	3(2.2%) ▲		91	9(9%) ▲		101	0(0%) ▬	75	-4(-5.1%) ▼
<b>Green Grams</b>	112	8(19.1%) ▲		61	-5(-7.6%) ▼		117	8(7.3%) ▲	99	-7(-6.6%) ▼

	Kisumu			Meru		Makueni	
	Apr Prices	change from Mar.		Apr Prices	change from Mar.	Apr-Prices	change from Mar
<b>Maize</b>	38	1(2.8%) ▲		21	0(0%) ▬	29	-1(-3.3%) ▼
<b>Imp. rice</b>	110	0(0%) ▬					
<b>Red Beans</b>	70	-1(-1.4%) ▼		70	5(7.7%) ▲	88	17(23.9%) ▲
<b>Red Sorghum</b>	40	5(14.3%) ▲		38	0(0%) ▬		
<b>Millet</b>	94	7(8%) ▲		71	1(1.4%) ▲		
<b>Green Grams</b>	84	3(3.7%) ▲		72	1(1.4%) ▲	90	13(16.7%) ▲

market with regional supply on a high. With anticipated harvest in Tanzania, prices are expected to go further lower as imports intensify towards the end of May. In Kisumu, though traders were sourcing the commodity from Busia. There were significant stocks coming in from Rift Valley as farmers were looking for money for long-rains season inputs as some are waiting for payments

from the NCPB. Daily offloads went down significantly to about 15-18MT. In Mombasa’s Kongowea market, daily offloads were about 52MT with much of the commodity coming from neighboring Kwale county. The supply was adequate with prices at source lower compared to the previous month; this resulted to a 3.4% decrease in price in April.

**Figure 2: Wholesale price trends of Maize in selected markets in Kenya**




**Beans:** Imports into the country from Uganda increased by 21.3% as domestic stocks decreased seasonally. In April, red beans prices declined remarkably as 10,874.29 MT of dry beans came from Uganda. Markets that were well integrated with Uganda’s eastern markets posted significant decline in prices. In Eldoret, field reports indicated that most traders were reliant on Busia market for supply of the commodity as Uasin Gishu and neighboring counties experienced a poor season. In Kisumu, traders were equally reliant on Busia as their counterparts in Eldoret. Kibuye market posted a 1.4% decline in prices indicative of relative stability in the market though supply was reported to be low compared to March as traders were not stocking too much as schools had

closed. In Mombasa, supply tightened from source resulting to an increase of prices of red beans and other varieties however, supply prospects are good with Tanzania, a key supplier to the region expected to be harvesting in May.

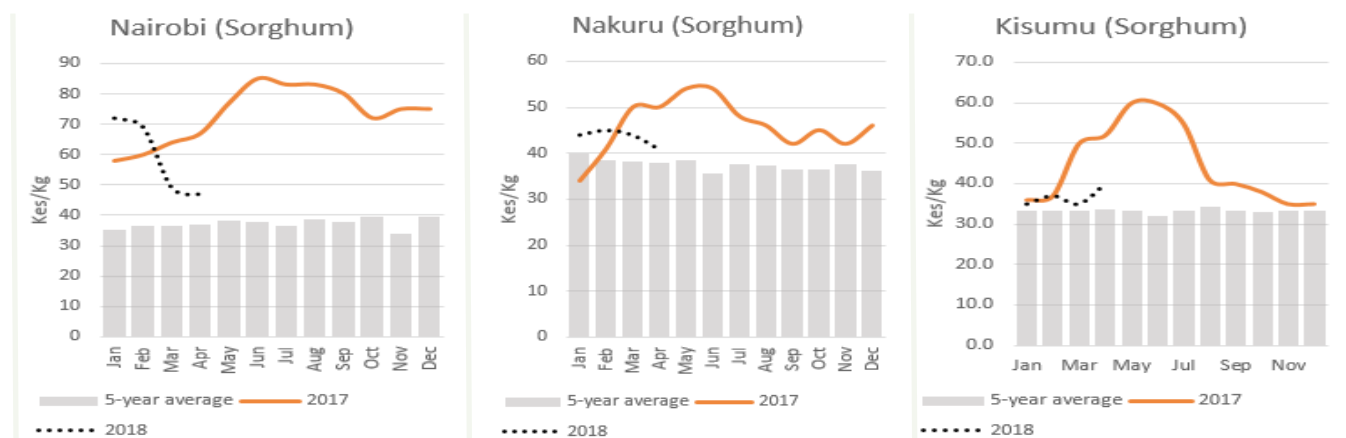
**Rice:** In Mombasa, imported rice was mostly sourced from India and Pakistan. Market prices remained relatively stable as supply from the global markets was adequate. In the monitored markets, prices remained stable and the trend is expected to persist in the coming month. In Kisumu reports indicated that rice from Pakistan was in abundant supply compared to the recent past as consumers were attracted by the low prices com-

pared to the aromatic variety rice from Tanzania; on average, daily offloads were about 9Mt to 10 MT.

 **Sorghum:** Prices were significantly lower than last year's level though above the five year average. Sorghum prices eased off in most of the monitored markets. Supply was reported to be adequate in Nairobi and Mombasa with much of it coming

from Uganda and western Kenya. In Kisumu, prices of the commodity increased significantly as prices at the source markets also increased marginally. In Meru, prices remained stable with short rains supply easing demand pressure. The commodity was trading at Kes 38/Kg and prices are expected to remain stable in the coming month.

**Figure 3: Wholesale price trends of Sorghum in selected markets in Kenya**



## 2.2 Rwanda


### Overview

- Prices of maize have increased seasonally in the production regions with financial outlay of many household reduced due to required inputs for 2018B season implementation.
- The supply of dry beans and sorghum tightened in April.
- Rice supply was adequate as prices were relatively stable.
- Export of beans to Uganda decreased as stocks diminished seasonally.
- Prices of key grain staples are projected to increase in the coming month with demand pressure from learning institutions.

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

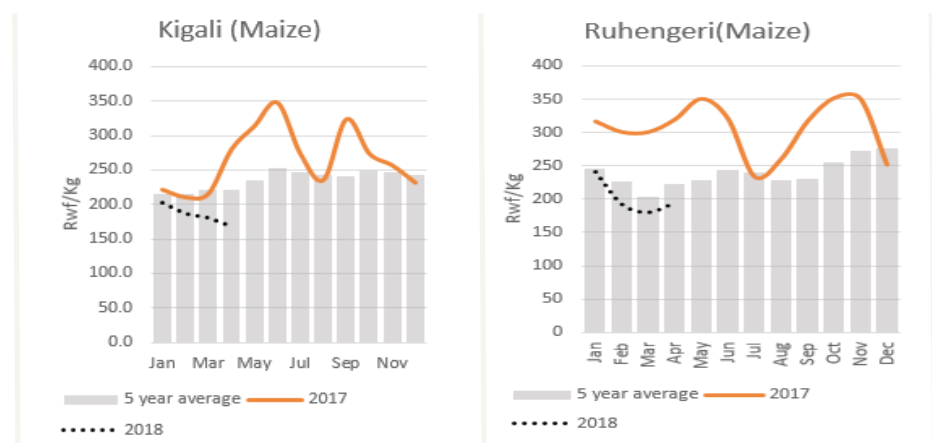
	Kimironko		Rubavu	
	Apr Prices	% change from Mar.	Apr Prices	% change from Mar.
Maize	249	-37(-12.9%) ▼	251	14(5.9%) ▲
Rice (Kigoli)	803	-13(-1.6%) ▼		
Red Beans	488	-50(-9.3%) ▼		
Red Sorghum	498	40(8.7%) ▲	359	38(11.8%) ▲
Millet	607	-100(-14.1%) ▼		
Wheat	499	-5(-1%) ▼	659	48(7.9%) ▲

	Ruhengeri		Ruhuha		Kamembe		Mulindi	
	Apr Prices	change from Mar.	Apr Prices	change from Mar.	Apr Prices	change from Mar.	Apr Prices	change from Mar.
Maize	195	15(8.3%) ▲	217	5(2.4%) ▲	205	5(2.5%) ▲	168	-13(-7.2%) ▼
Rice (Kigoli)	854	-45(-5%) ▼	729	5(0.7%) ▲	739	-11(-1.5%) ▼	780	25(3.3%) ▲
Red Beans	450	50(12.5%) ▲	327	9(2.8%) ▲	357	7(2%) ▲	413	48(13.2%) ▲
Red Sorghum	350	13(3.9%) ▲	363	14(4%) ▲			329	-5(-1.5%) ▼
Millet	705	-26(-3.6%) ▼					523	14(2.8%) ▲
Wheat	502	2(0.4%) ▲					524	12(2.3%) ▲

 **Maize:** Prices have increased marginally in the Eastern markets with stocks reported to be diminishing. In The urban market of Kimironko and Mulindi, prices went down in April as traders met domestic shortfalls with imports from Uganda. Prices were below the five year average and below last year's levels in the monitored markets. In Ruhuha market, supply to the market was low in April as processing industries located in the region were offering better prices, therefore, farmers and traders opted to sell to

the factories. In Musanze and Rubavu, supply was primarily from within the country though stocks diminished seasonally; therefore a gain of 8% (Rwf 15/Kg) and 5.9% (Rwf 14/Kg) was posted in April. In Rubavu, reports indicate traders from Goma market in the DRC sustained the demand. However, the municipal laws in DRC have pushed traders to transit the commodity through informal means. In Gicumbi's Byumba market, maize prices were stable in April with daily offtakes estimated at 105MT though much of the commodity was imported from Uganda.

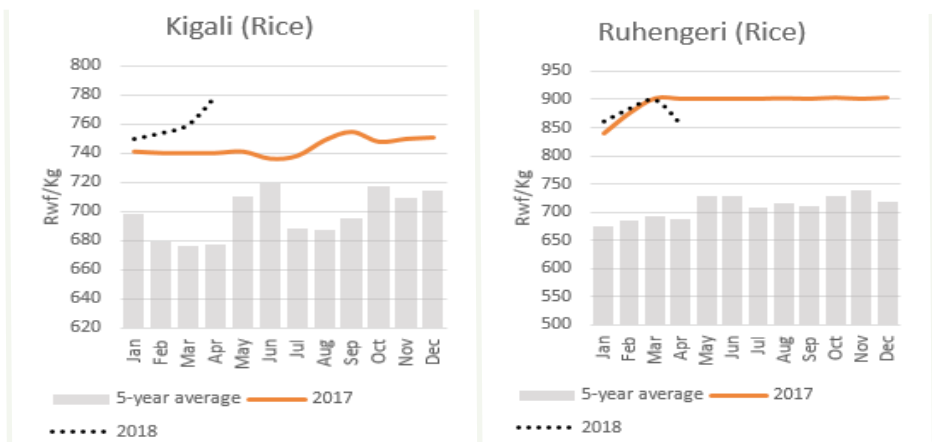
**Figure 4: Wholesale price trends of Maize in selected markets in Rwanda**



**🌾** In Musanze market in Ruhengeri, the demand for the region’s Kiryumukwe and Kansirida variety was reported to be high across the border in Uganda due to its good taste. In April much of the supply in Musanze was coming from Burera, Gankeke and Nyabihe districts. The April market offload was estimated at about 600MT for all varieties with demand reported to be high as schools were opening. With supply declining marginally and enhanced demand,

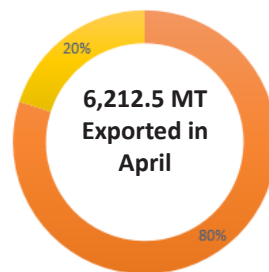
prices increased considerably by 12.5% (Rwf 50/kg) in April and the trend is expected to persist in the coming month. In Ruhuha, demand was high with supply reported to have gone down for red beans in April, however, prices remained relatively stable and an increase is expected in the coming month. The supply of yellow beans was steady with no significant change observed.

**Figure 5: Wholesale price trends of Rice in selected markets in Rwanda**



**🌾** Sorghum and Millet: In Musanze, the demand for sorghum was reported to be high with locally produced variety attracting higher prices compared to imports for Uganda, price went up marginally by 3.9% (Rwf 13/Kg) with much of the demand sustained by the traditional brew (ikigage) industry. In Kimironko, supply was reported to be suppressed in April therefore, prices gained by 8.7% (Rwf 40/Kg) whereas in Mulindi, prices remained relatively stable with field reports indicating there was adequate stocks in the market but expected to diminish precipitously as local supply is diminishes seasonally. In Byumba market, supply in April was reported to be very low therefore, prices increased marginally and the trend is expected to persist in May.

**🌾** In April, supply to the markets tightened slightly with exports outside the country decreasing by 16% (2376.6MT). Uganda accounted for 80% of exports through the RATIN monitored trade corridors as trade with Burundi slowed down due to adequate supply realized this year.



■ Rwanda to Uganda    ■ Rwanda to DRC

Informal volumes from EAGC RATIN monitored trade corridors



## 2.3 Uganda

### Overview

- Demand for beans and maize gained in April with significant increase in volumes traded with Kenya, Rwanda and DRC.
- Stocks realized in the south/second season have started to diminish as the farmers are currently planting.
- Prices are expected to increase seasonally in the coming month.



In April, the price of maize was below the five-year average and last year's high levels in the monitored markets. In Kampala, demand was reported to be low as schools had closed, therefore prices remained stable with the commodity trading at Ugx 711/Kg. In Busia, supply was reported to be high with daily offloads of about 900MT; with increased regional demand, prices increased by 9% in April as Kenyan traders were purchasing the commodity at about Kes20/Kg. In Kasese, low demand of the commodity led

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

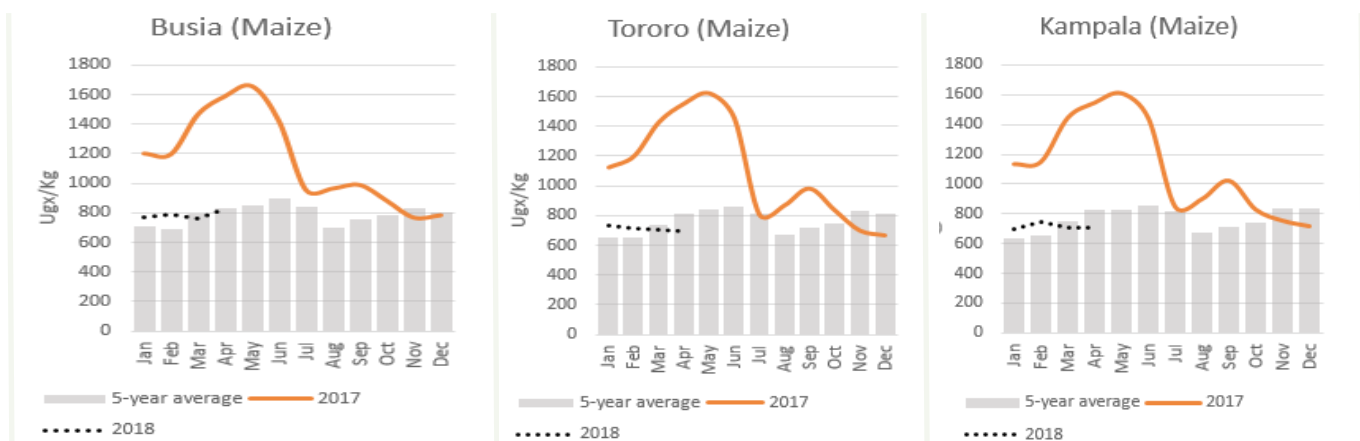
	Kampala			Lira			Busia			Gulu		
	Apr-Prices	% change from Mar.		Apr Prices	% change from Mar.		Apr Prices	% change from Mar		Apr Prices	% change from Mar.	
Maize	711	3(0.4%)	▲	664	-46(-6.5%)	▼	827	71(9.4%)	▲	800	6(0.75%)	▲
Rice	3,759	259(9.6%)	▲	3,752	328(9.6%)	▲				3,500	381(21.5%)	▲
Mixed Beans	1,921	120(6.7%)	▲	1,665	-68(-3.9%)	▼	1,627	39(2.45%)	▲			
Red Sorghum	878	-34(3.7%)	▼	675	-24(-3.9%)	▼	763	-11(-1.42%)	▼	800	0(0%)	■
Millet	1,910	109(6.05%)	▲	1,676	-184(-4.77%)	▼	1,721	-29(-1.65%)	▼	1,700	-1(-0.05%)	▼
Soya Beans	1,728	239(16.1%)	▲	1,647	187(12.8%)	▲	1,810	238(15.1%)	▲	1,470	274(13.4%)	▲

	Tororo			Kasese			Masindi		
	Apr Prices	% change from Mar.		Apr Prices	% change from Mar		Apr-Prices	% change from Mar	
Maize	690	-17(-2.4%)	▼	577	-75(-11.5%)	▼	700	0(0%)	■
Rice	2,987	381(14.7%)	▲				3,846	34(13.8%)	▲
Mixed Beans	1,600	-24(-1.47%)	▼	2,208	352(19%)	▲	2,355	86(3.8%)	▲
Red Sorghum	689	-144(-16.5%)	▼	1,023	-407(-28.5%)	▼	1,080	-420(-28%)	▼
Millet	1,680	-106(-5.93%)	▼	2,966	257(9.48%)	▲	2,495	194(8.43%)	▲
Soya Beans	1,673	207(14%)	▲	1,854	249(15.5%)	▲	1,501	49(3.4%)	▲

to traders stocking below capacity; prices decreased significantly by 11.5% in April as a result of low consumption with demand from Eastern DRC decreasing by about 16%. In Gulu, demand was reported to be low as cheaper substitutes such as cassava were in plenty. In April, farmers were in the late planting with most sections of the country already planted in March. Therefore, much of

the households' expenditure went into procuring inputs for the main season crop. Stocks are expected to diminish seasonally in May as farmers have released their produce to get money for the main season implementation. Therefore, prices will increase typically heading into the harvest period in June.

**Figure 6: Wholesale price trends of Maize in selected markets in Uganda**



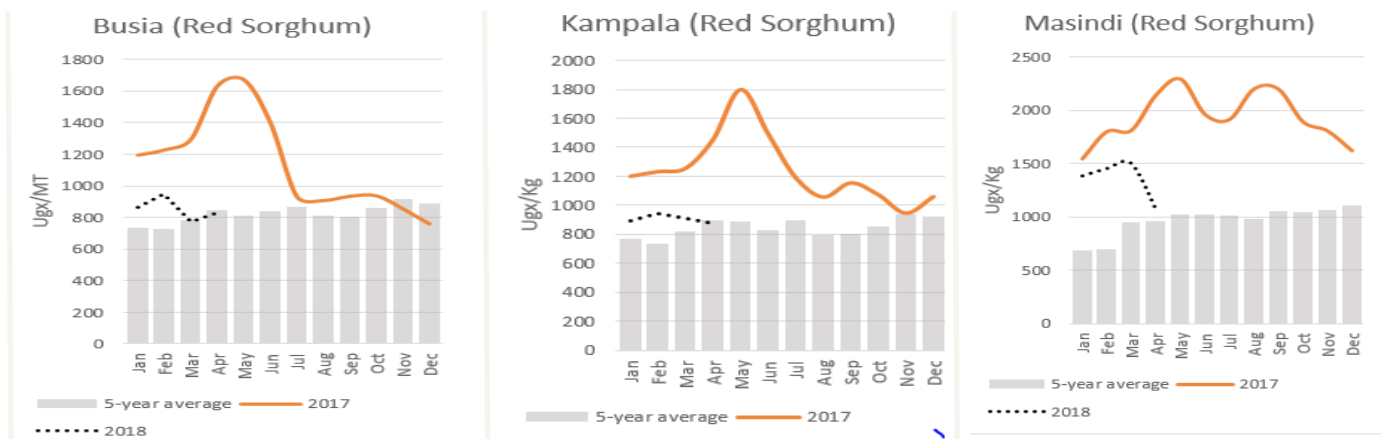
In Busia, much of the dry beans traded was sourced from Western Uganda and Rwanda. The new crop from the eastern region of Bunyole was also traded; this is an offseason crop as it is produced in the receding swamps of the region, however demand was reported to be somewhat high as prices of mixed

and red beans remained relatively stable. In Kampala, old stocks of yellow beans were trading at about Ugx 2750/Kg compared to Ugx 3550/Kg of new stock from Kasese and Rwanda. In Kampala, red beans prices increased significantly 12.8% in April with supply reported to have tightened.. In Kasese, supply within the district

was reported to be diminishing with traders coming all the way from Busia and Kampala to get the commodity. The demand has pushed prices up by 28%. Tororo posted the lowest price of mixed beans amongst the monitored markets. Amongst the beans varieties, short Nambale beans remained the most preferred trading at about Ugx 2800/Kg in Kampala markets. Prices are expected to increase as reports indicated that stocks had been diminishing in the markets.

In Gulu, prices remained relatively stable with supply reported to be good. Demand was sustained by the refugee population and relief agencies buying the commodity in bulk. In Kampala, traders exporting mixed beans to Rwanda came back with sorghum; the quality was reported to be good with prices remaining relatively stable. A marginal decrease was recorded in April as the commodity was trading at Ugx 878/Kg. The price of the commodity is expected to increase in May with new stocks expected in May.

**Figure 7: Wholesale price trends of Sorghum in selected markets in Uganda**



## 2.4 Tanzania

### Overview

- Early harvest of the Msimu crop underway in the southern region and expected to intensify in May.
- Significant stocks realized from the Vuli crop; Performance was above average.
- Compared to last year April, prices of most commodities have eased considerably.
- Exports from Tanzania have increased seasonally with sufficient stocks reported in the markets.

Prices are below the last year's levels and the five year average with a downward trend observed in most markets. In Iringa region, the msimu crop was at late maturity stage therefore, supply to the market was low in April therefore, prices increased by 7.5% (Tzs 23/Kg); however, supply is expected to increase seasonally in May. In Dodoma, field reports indicated that farmers from neighboring regions had adequate stocks in the granaries and also, traders in the Kibaigwa had good stocks in the warehouses. However, prices were low and the lack of region-

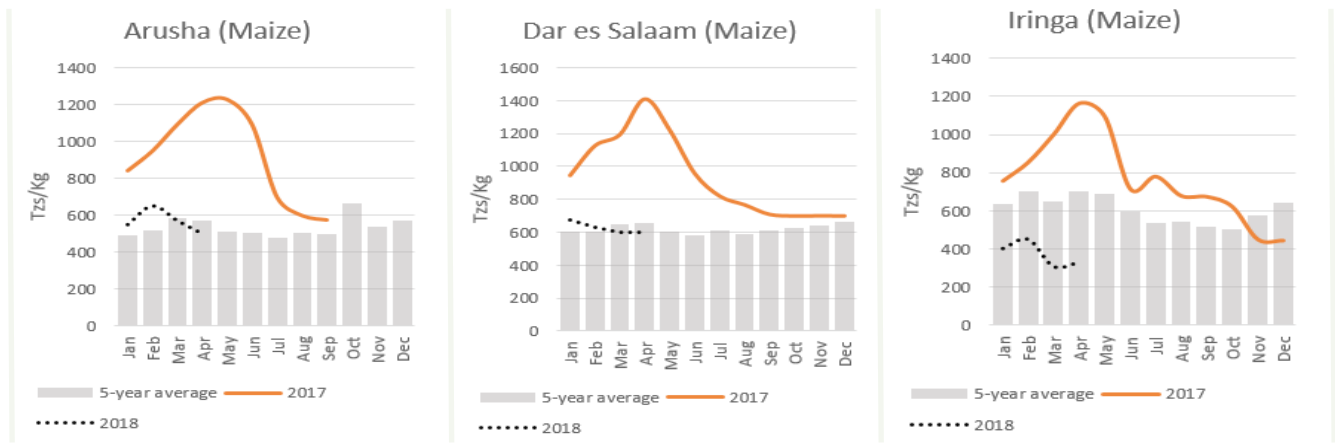
**Table 7: Wholesale Prices of Grains in selected markets in Tanzania (Tsh/Kg)**

	Dar es Salaam			Iringa			Mbeya			Arusha			Dodoma		
	Feb Prices	change from Mar.		Feb Prices	change from Mar.		Feb Prices	change from Mar.		Feb Prices	change from Mar.		Feb Prices	change from Mar.	
Maize	600	0(0%)	▬	330	23(7.5%)	▲	300	-12(-3.8%)	▼	500	-71(-12.4%)	▼	386	-26(-6.3%)	▼
Mbeya Rice	2,328	16(3.7%)	▲	2,047	47(2.4%)	▲	2,153	-291(-4.1%)	▼	2,000	1(0.1%)	▲			
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%)	▬				644	44(7.3%)	▲				329	10(3%)	▲
Yellow Beans	2,113	5(0.2%)	▲	1,810	1(0.1%)	▲	1,452	-46(-3.2%)	▼	1,700	-80(-4.5%)	▼			
Pigeon Peas	800	0(0%)	▬	1,425			734	4(0.6%)	▲	500	0(0%)	▬	338	23(7.3%)	▲
Wheat	1,245	-55(-4.2%)	▼	1,375	22(1.6%)	▲	945	78(7.3%)	▲	1,200	0(0%)	▬			

al traders (Kenya and Rwanda) led to hoarding of the stocks. In Arusha's Kilombero market, supply of maize was adequate with prices easing off by 12% (Tzs 71/Kg); Northern region had just come out of the vuli crop harvest, therefore, stocks outlay in the northern market were good. In Tandale market, Dar es Salaam, maize was trading between Tzs 500-900/Kg depending on qual-

ity; prices remained stable with supply from the southern and northern regions reported to be stable. In Mbeya, early harvest has reported in some regions with the market posting the lowest price amongst the monitored markets. Therefore, prices are expected to go down in May as harvest intensifies in the region.

**Figure 8: Wholesale price trends of Maize in selected markets in Tanzania**



From the RATIN monitored trade corridors, Tanzania exported about 5444 MT of rice to the region informally and this represented a 25.7% (1,113.8MT) increase from the previous month's volumes. Imports to Rwanda accounted for 56% of total trade from Tanzania.

In April, price of rice was above last year's level and the five year average. Volatility was relatively low for Mbeya rice with supply reported to have increased marginally in the in the monitored markets. Price volatility was relatively low for Mbeya rice with supply reported to have shored up in the monitored market. In Dar es Salaam, there was a marginal 3.7% gain from previous month average with stocks supplied reported to have increased slightly. In the production zone, the commodity eased by 4% and a downward trend is expected in the coming month as harvest has commenced. In Arusha, price was relatively stable and is expected to go down in May as Kahama and Morogoro regions will be harvesting the msimu crop.




**Plate 1: New stocks of Pulses in Mbeya retail market**


In the southern region, harvest commenced in mid-April. Therefore, stocks outlay improved significantly in the markets. Regional trade is peaking up with stocks exported out of Tanzania expected to increase seasonally in May. In Mbeya, previous season beans had attracted higher prices as they were primarily sold as seed; in April, the relative stability was observed in the market with a marginal 3.2% decrease in yellow beans prices. In Arusha, yellow beans prices eased by 4.5% with supply from the region reported to be adequate. In Iringa, prices were high in April (Tzs 1801/Kg) however; a down ward trend is expected in May with inbound stocks from the region.

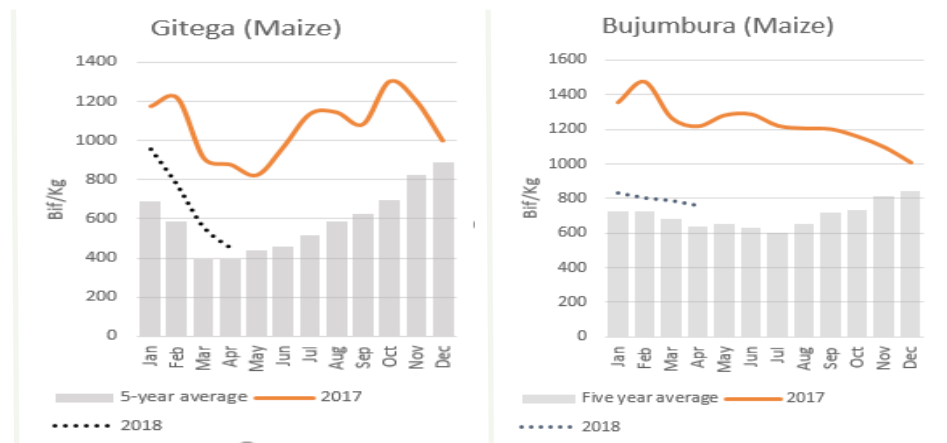


**Overview**


- Supply of maize has decreased in the monitored markets.
- Beans prices were relatively stable with adequate supply from the 2018A season
- Imports of sorghum from Tanzania eased pressure on demand of the commodity.

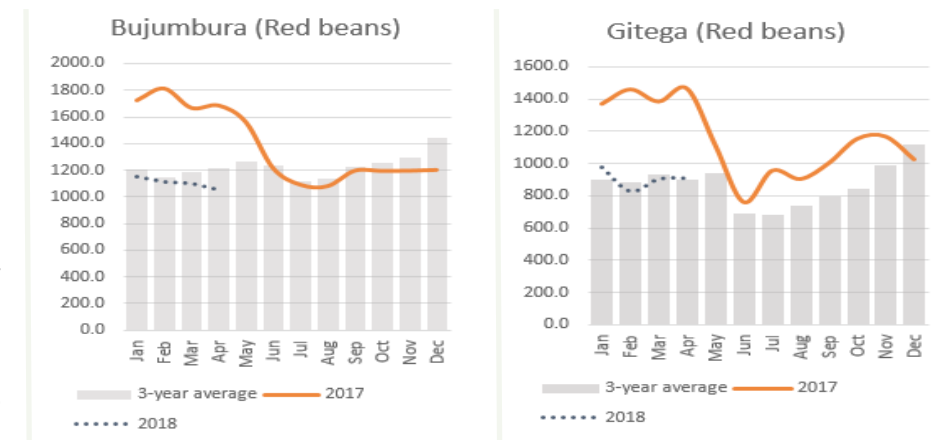
 The price of maize was on a decline in the monitored markets though stocks reaching the market decreased seasonally. The 2018A season eased demand pressure as prices were below last year's high levels in all the monitored markets. In Bujumbura, prices went down on a third consecutive month, however, they were still above the five year average. In April there was a 4.3% (Bif 34/Kg) decrease to previous month's average indicative of adequate supplies. In Gitega there was a significant decline in prices. Supply from Karusi and Munyinga decreased in April and the same trend is expected in the coming

 Much of the rice consumed in the country is mainly imported; regional supply remained steady with little volatility observed in April. Field reports indicated that supply decreased marginally due to increased transportation costs. In Gitega market, supply from Imbo region was good as prices went down marginally by 1.3%. Supply from Tanzania is expected to meet the market demand in May as the major season harvest will increase the region's demand.

**Figure 9: Wholesale price trends of Maize in selected markets in Burundi**


month, therefore, prices are expected to gain in the coming month. In Ngozi, field reports indicated there was a decrease in demand for the commodity in April with a 6.1% (Bif 53/Kg) decrease posted with inbound new stocks pushing prices of old stock lower; supply from Kirundo and Munyiga communes were reported to be adequate.

 In April, supply to the markets was reported to have declined marginally. However, there was no considerable change in prices. Prices were at the same level with the three-year average indicative of the good season performance of the 2018A crop. In Ngozi market, traders reported that stocks reaching the market were adequate though demand went down slightly with red beans and mixed beans prices easing marginally. In Bujumbura and Gitega, there were marginal decline in prices with prices expected to gain marginally in May.

**Figure 10: Wholesale price trends of Red beans in selected markets in Burundi**

**Table 8: Wholesale Prices of Grains in selected markets in Burundi (Bif/Kg)**

	Ngozi			Gitega			Bujumbura		
	Apr-Prices	% change from Mar.		Apr Prices	% change from Mar.		Apr Prices	% change from Mar.	
<b>Maize</b>	707	-46(-6.1%)	▼	454	-104(-18.6%)	▼	756	-44(-4.3%)	▼
<b>Rice</b>	1,895	-5(-0.3%)	▼	1,764	-24(-1.3%)	▼	1,565	-215(-12.1%)	▼
<b>Red Sorghum</b>	724	3(0.4%)	▲	905	-45(-13.8%)	▼	974	-20(-7.63%)	▼
<b>Wheat</b>	1,538	73(5%)	▲	1,575	31(2%)	▲	1,503	-17(-1.1%)	▼
<b>Yellow Beans</b>	1,314	13(1%)	▲	1,345	38(2.9%)	▲	1,223	22(1.8%)	▲
<b>Soya Beans</b>	1,090	21(2%)	▲	1,219	33(2.8%)	▲	1,606	-4(-0.2%)	▼

### 3.0 CROP SEASON REVIEW

#### Climate Update.

According to ICPAC , in March, most of the regions in East Africa experienced near normal to severely wet conditions with part of north and south of Kenya experiencing extremely wet conditions. In Burundi and southern Tanzania, there was near normal to moderately dry conditions.

**Table 9: March weather performance.**

Country	Rainfall (mm)	Temperature
Kenya	100-500mm	Cooler than average max. temp
Tanzania	300-500mm	Cooler than average max. temp
Burundi	100-300mm	Near average max. temp
Rwanda	100-300mm	Cooler than average max temp (eastern)
Uganda	100-300mm	Cooler than average max temp
South Sudan	100-200mm	Near average max. temp

Source: ICPAC

#### Season Update

**Uganda:** March to May long rains were characterized with early onset conditions looking favorable. Rainfall was abundant in March and April though localized incidences of floods have been reported.

**Tanzania:** According to data from USGS, Vegetation indices and rainfall estimates for the southern region of Ruvuma and Iringa are above the last year's values with the maize crop reaching maturity. However, rains at this stage of crop development did not affect overall productivity. The vuli crop in Ruvuma region was reported to have performed exceptionally well. According to the National Food Security Bulletin, Fall army worm invasion was reported in Arusha, Shinyanga and Mbeya regions. Early Harvest begun in April in the unimodal zones (Southern region) and therefore, will intensify in May.

**Kenya:** Planting is ongoing in the production region as the long rains season began in March. The rainfall was above normal in Nakuru, Eldoret and Kitale. Floods were experienced in the country and this may lead to run-off and damaging of emerging crops.

**Burundi:** Season B has commenced positively with adequate rains recorded in April. However, flooding has been experienced in the eastern lowlands.

**Rwanda:** There was below average seasonal performance in February but intensified in March. In April, seasonal rainfall was slightly above average.

**South Sudan:** Seasonal rains began early in February and have continued through April. In the southern Bi-modal region, farmers are currently engaged in planting as security situation has improved

Figure 1: Markets and Borders monitored by EAGC RATIN

