

Highlights

- Cereal crop outputs in Kenya, Northern Tanzania, and Uganda from the first season is estimated at below average despite end of season rainfall improvement.
- Trade between Uganda and Rwanda expected to increase following anticipated opening of custom borders after signing of a pact to ease tensions between the two countries.
- In Kenya, regional trade was central in improving supply in the urban markets as domestic stocks remained low in much of the production regions.
- Recently gathered harvest in Uganda, Rwanda and Burundi improved market supply with price decrease observed in most markets.
- The June to August harvest season was completed in Tanzania. Maize and rice price gains were compounded by firm demand from both eastern and southern africa countries.

East Africa Crop Season

In **Kenya**, the first season (long rains) was characterized by offseason rains in June and July which compensated earlier deficits in March and most of April resulting to partial recovery of water stress and late planted crops in key growing areas of North Rift Valley and western Kenya ([Crop Monitor](#)). Harvest in North Rift and western Kenya is expected to delay following the late onset of rains. In the South Rift, harvest of maize commenced in July with field reports indicating lower prospects compared to the last year due to early season moisture stress. In the eastern, parts of central and the coastal region, there was a near failure in production of cereals and pulses as rainfall was estimated at 60 percent below average. The State Department for Crop Development (SDCD) estimates long rains maize production at 2.3 million MT, a 25 percent decrease compared to the average in both the medium potential areas of western Kenya and the Rift Valley with the national maize deficit forecasted at 475,767MT by September 2019 ([KFSSG](#)).

The major harvest "Mvuli" in **Tanzania** was completed in June in the southern and central unimodal regions with output estimated at above average. In the central region, yield was affected by erratic temporal distribution of rains therefore, crop output is expected to be lower than last year. In most bimodal production region in the North and North Eastern and Northern Coast, the March to May rains were below average by about 40 percent ([Crop Monitor](#)). National aggregate cereal production is forecasted at about 10.5 million tonnes (Maize - 6.1m MT; Rice Paddy - 3.08m MT; Sorghum - 0.8m MT and other grains - 0.46m MT), a marginal gain of 0.1 percent compared to 2018 ([FAO](#)).

In **Uganda**, an assessment by [FEWSNET](#) found that the first season establishment and progression was among the worst since 1981. The season was characterized by delayed onset and unusually dry conditions at the typical peak of the rainy season. However, abundant late rains led to crop recovery and according to [FAO](#), maize production in 2019 is estimated at 2.5 million metric tonnes, a 10 percent decline compared to last year. With the extended wet conditions observed at

the end of the season, there is a risk of post harvest losses in most of the bimodal production areas with field reports indicating maize traded in most markets was high in moisture content, thus attracting lower prices. According to reports from the country offices in **Rwanda** and **Burundi**, the second season harvest was completed in July with output estimated at above average in both countries. Updates from the [Crop Monitor](#) indicate that in the northern and central unimodal production region of **South Sudan**, crop growing conditions were favourable in July and August as a result of adequate and well distributed rains however, agricultural activities continue to be affected by the lingering effects of the prolonged conflict.

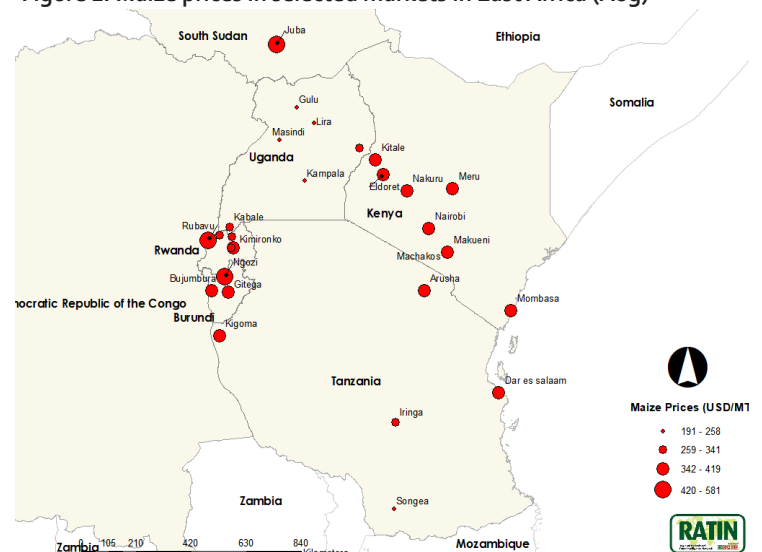
Season Forecast for October November December (OND) Season

According to the [53rd Greater Horn of Africa Climate Outlook Forum \(GHACOF\)](#), wetter conditions are expected during the OND season over much of the region. However, drier than average rainfall is forecasted over eastern Kenya, and western Tanzania. Early than normal start of rains of the October November December (OND) season is indicated across Tanzania, Burundi, Rwanda, Uganda, and western Uganda.

Maize

Maize prices had mixed outcomes in the region; significant price decline was noted in most markets monitored in **Uganda** however, compared to last year, prices were higher by 103, 123, 81 percent in Kampala, Kabale and Gulu respectively. Maize traded between USD 191/MT and USD 258/MT with Masindi recording the lowest price whereas, Gulu had the highest. Even though prices have decreased considerably following improved domestic supply from the first season harvest, increased regional demand from countries in deficit is highly likely to exert pressure on prices in the near future.

Figure 1: Maize prices in selected markets in East Africa (Aug)



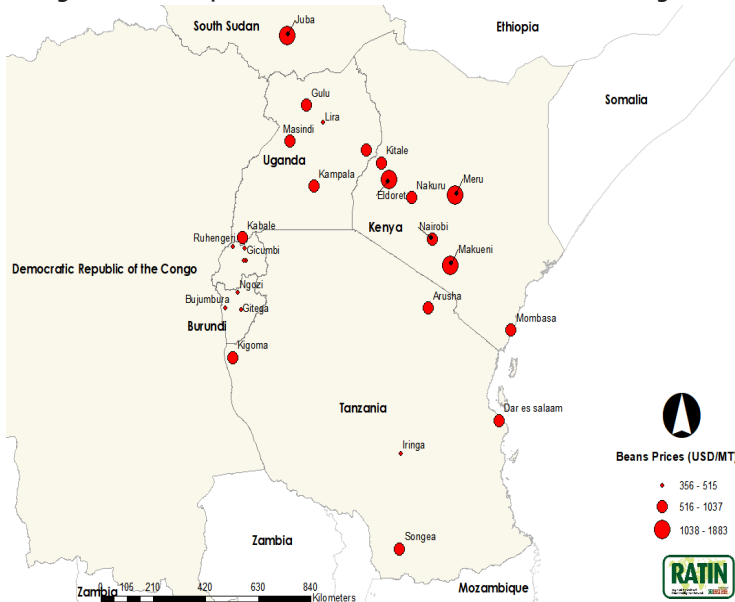
In August, there was notable increase in trade between **Kenya** and **Uganda**, about 11,132MT was imported into Kenya compared to the previous recorded traded volume of about 2,257 MT in June. The trend

expected to persist well into September following tightened domestic supply. Prices in Nairobi and Mombasa declined by 12 and 3 percent with imports from Tanzania and Uganda improving availability. In the production markets, the commodity averaged USD 376/MT and USD 394/MT in Nakuru and Eldoret, a 1 and 20 percent gain month-on-month with stocks reported to be low in most aggregation centres.

Domestic supply improved with the recently gathered in **Tanzania** however, field reports indicate that prices gained because of external demand from eastern and southern Africa countries. In the southern production region, prices averaged USD 341/MT in Iringa, a 172 percent gain compared to earlier year levels with pressure exerted by trader with Malawi, Zambia and the DRC. In the Northern region, prices were up by 130 percent year on year averaging USD 360/MT in August. Prices are expected to maintain an upward trend in the coming months due to firm domestic and regional demand.

Prices decreased as expected at this time of the year in **Rwanda** with improved supply from the season B harvest. Trade between Uganda and Rwanda is expected to resume following signing of a pact by head of states of the two countries to ease tensions that resulted to restrictions of commodity movement since late February. Therefore, it is likely that supply may be augmented with imports from Uganda once normal border operations resume. In **Burundi**, prices were lower than earlier year levels with stocks reported to be ample in the monitored markets.

Figure 2: Beans prices in selected markets in East Africa (Aug)



Beans

In August, trade eased significantly following a decline in tradable stocks resulting from two subsequent below average output in **Uganda**; exports to Kenya were 30 percent lower year-on-year at about 8,348 MT. On the other hand, 633MT of yellow beans was imported to Uganda from Tanzania, a 95 percent increase y/y indicative of lower stocks in Uganda. With low regional supply due to poor crop performance across the region, pressure on available stocks in Tanzania and Uganda is expected to remain high from Kenya, Rwanda and South Sudan who are likely to have shortfalls in supply towards the end of the year.

In the region, lowest prices were observed in **Burundi** as the country came out of the harvest season. Prices averaged USD 491/MT, USD 495/MT, and USD 471/MT in Gitega, Ngozi, and Bujumbura correspondingly. Compared to the previous month, prices were up by 12.5 and 11.5 percent in Ngozi and Gitega whereas; in Bujumbura prices eased by 5

percent and expected to increase seasonally until the end of the year. Similar to **Burundi**, **Rwanda's** supply was ample following recent harvest from the second season. Prices averaged USD 498/MT in Kimironko, an 11 percent decline compared to the previous month. A similar downward trend was observed in Ruhengeri with the commodity averaging USD 466/MT. Heading into the lean period of production, imports from Uganda may shore up supply following the anticipated resumption of trade through custom borders.

The late harvest in **Uganda** had a bearing on market supply as stocks thinned earlier than usual in most markets, prices were unusually elevated in July but declined with improved availability in August. In Gulu, prices decreased to USD 625/MT compared to USD 804/MT in June with declines observed in Kabale and Masindi. However, Kampala has a marginal gain as mixed beans traded at USD 707/MT compared to USD 678/MT in June. Field reports indicate there has been increased regional demand in the frontier markets and the trend is expected to persist in the coming months. Prices are expected to increase seasonally but they will be above last year's levels.

In **Kenya**, harvest from south rift eased pressure on demand in most markets in Nakuru, Kericho and Kisumu. In Nakuru, Prices were down by 18 percent month-on-month as the commodity traded at USD 636/MT. In the eastern markets, low supply in Makueni and Machakos led to price gaining by 8.5 and 16.5 percent respectively. In Machakos, red beans traded at USD 1,083/MT, the highest price recorded in the past five years.

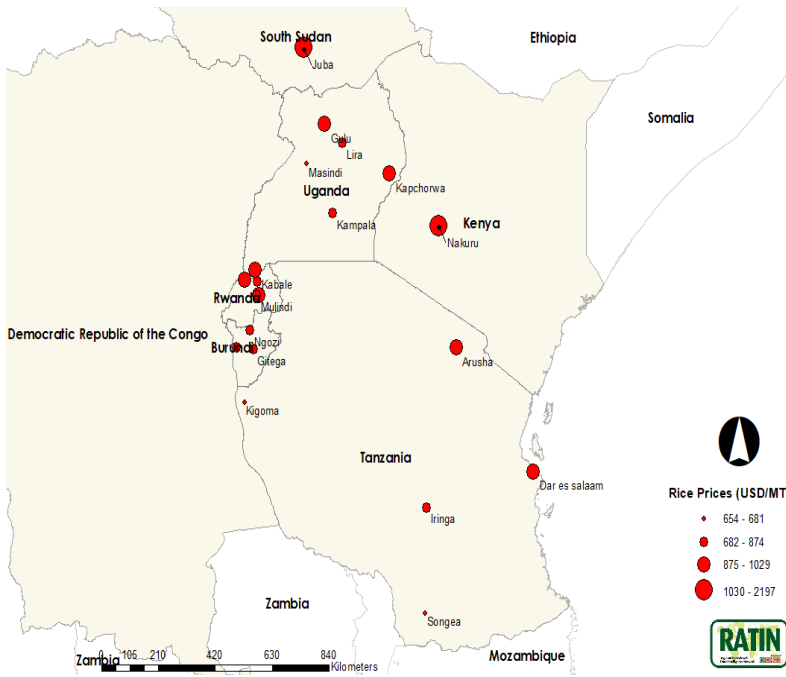
Rice

In Kenya, the poor performance of the long rains affected production in the country's main irrigation scheme located in Mwea, central **Kenya**. As of August, the water supply was half the capacity following dry conditions experienced over most of central Kenya. The late rains had a bearing on production as reports indicate that several farmers did not plant also, water rationing affected production activities. With production outlook looking grim, regional and international markets are expected to plug the demand gap. In the urban markets, locally produced *pishori* rice averaged USD 1570/MT in Nakuru in the past three months with demand remaining high amidst low domestic supply. In Kisumu, the commodity traded at about USD 1,076/MT with much of the supply sourced from Tanzania's lake region through Isebania border. Imports from the far-east are expected to play a major role in reducing demand pressure not only in Kenya, but also other deficit producer countries in East Africa.

Recent harvest in **Tanzania** improved supplies however, increased regional demand led to gains in most markets. In Dar es Salaam, rice traded at USD 924/MT, a 5 percent increase from last year's levels. In Arusha, there was a 46 percent increase compared to last year as the commodity as prices leveled at USD 898/MT. The 2019 production is forecasted to remain stable however, prices are expected to increase faster than usual due to increased strong regional demand.

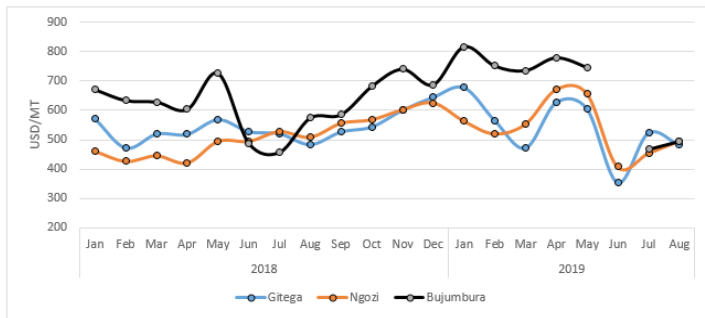
In **Uganda**, notable price declines were recorded in most markets following improved availability from the first season harvest. In Masindi, the commodity averaged USD 678/MT, a 10 percent decline compared to last year. In Kampala supply was ample from both from domestic and regional supply. The *Kaiso* variety averaged USD 874/MT, 3.5 percent lower than last year. Prices are likely to trend seasonally in the coming months with price gains expected in September and October. If the second season rains materialize as forecasted, the second season harvest in December will improve domestic supply.

Figure 3: Rice prices in selected markets in East Africa (Aug)

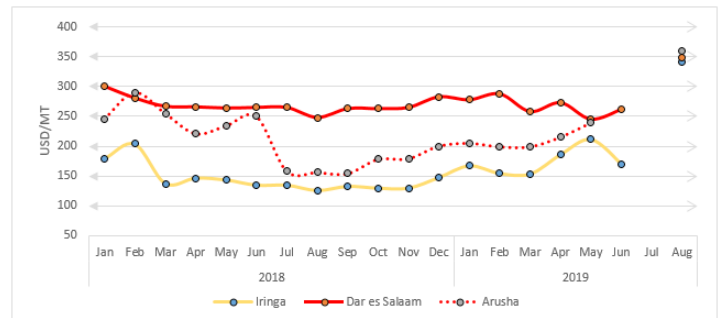


Maize Price Trends selected markets in East Africa

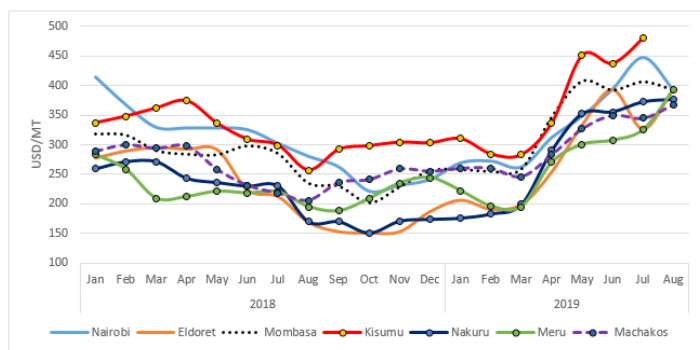
Burundi



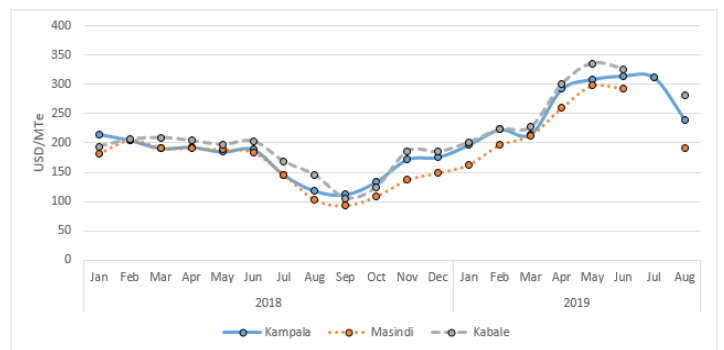
Tanzania



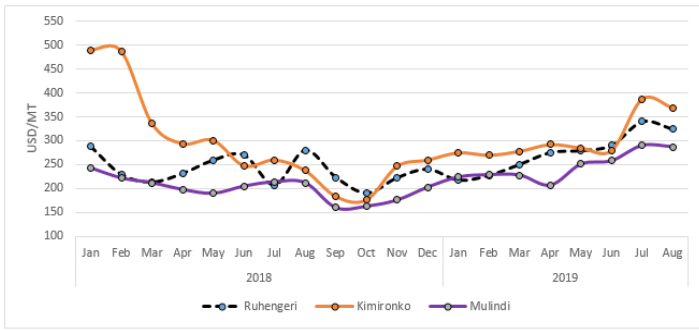
Kenya



Uganda

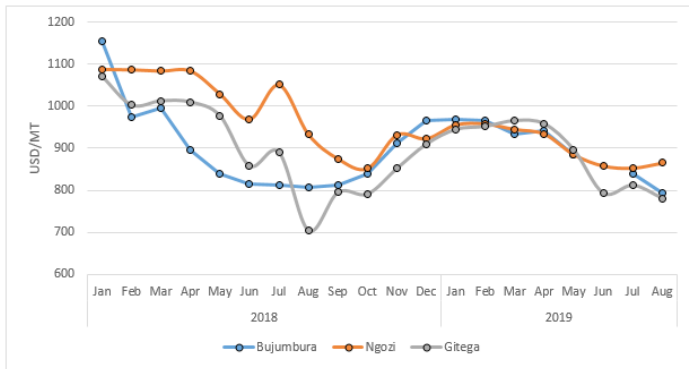


Rwanda

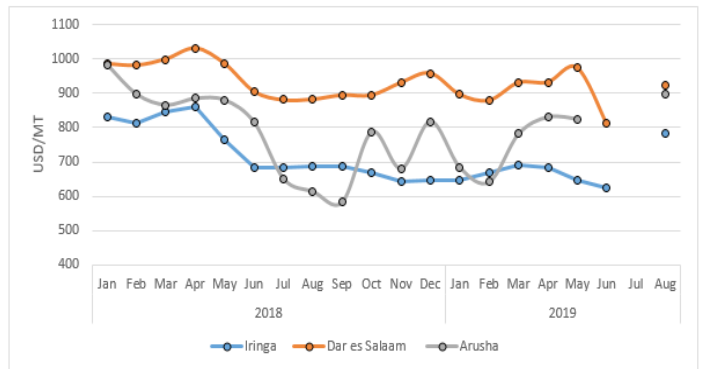


Rice Price Trends in selected markets in East Africa

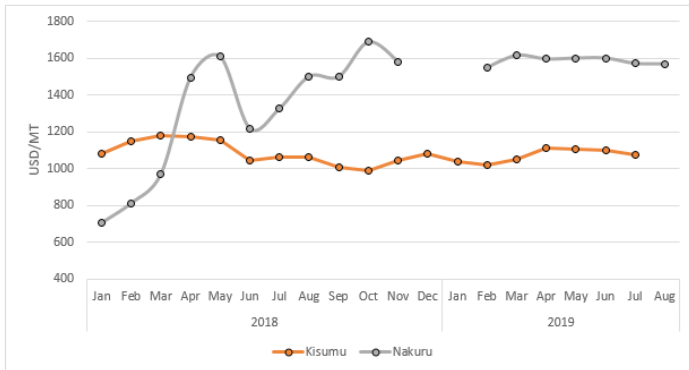
Burundi



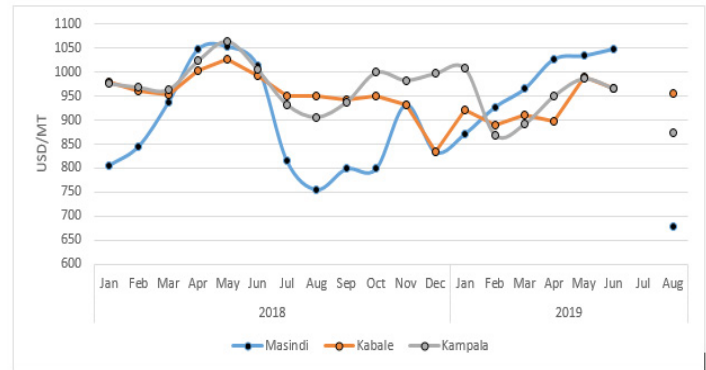
Tanzania



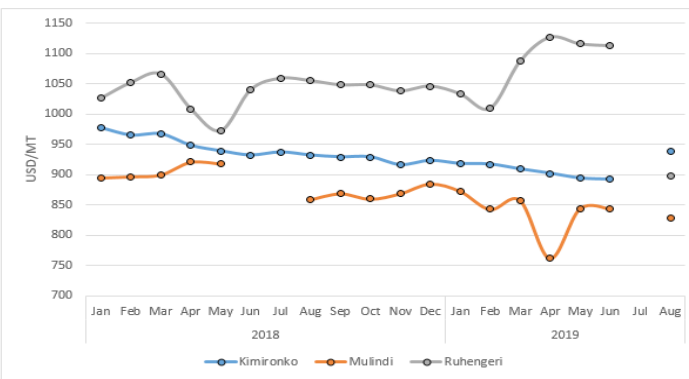
Kenya



Uganda

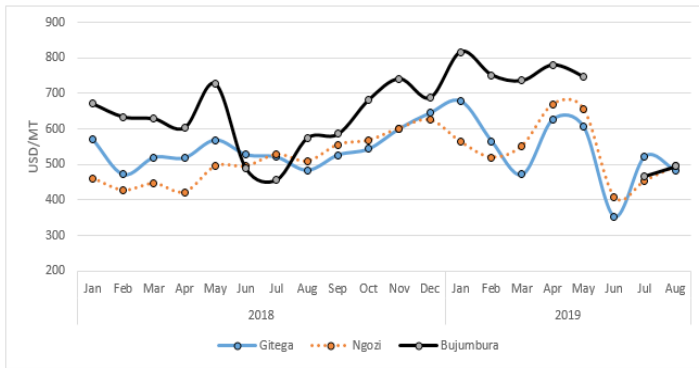


Rwanda

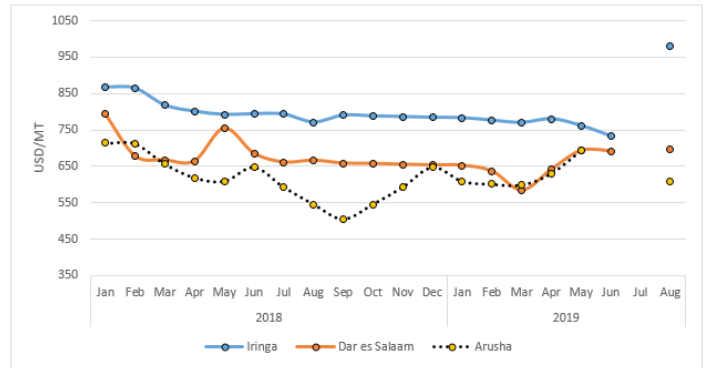


Dry Beans Price Trends in selected markets in East Africa

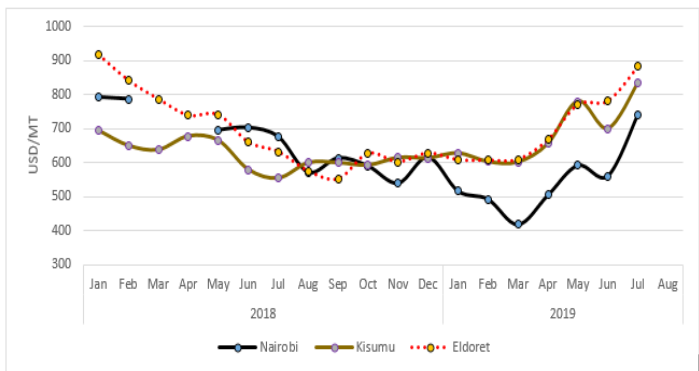
Burundi



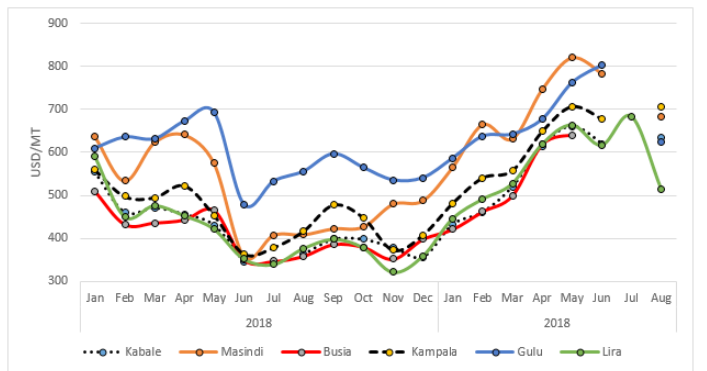
Tanzania



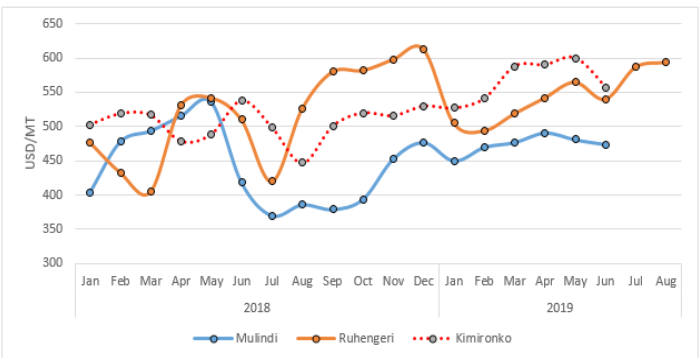
Kenya



Uganda



Rwanda



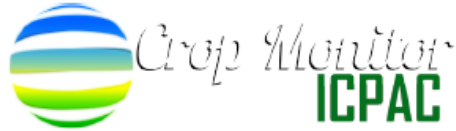
APPENDIX 2: EAGC RATIN monitored borders and markets



Partnerships



ICPAC
IGAD Climate Prediction
& Applications Centre



Prepared by members of the **GEOGLAM Community of Practice**, Coordinated by the **IGAD Climate Prediction and Application Center**



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