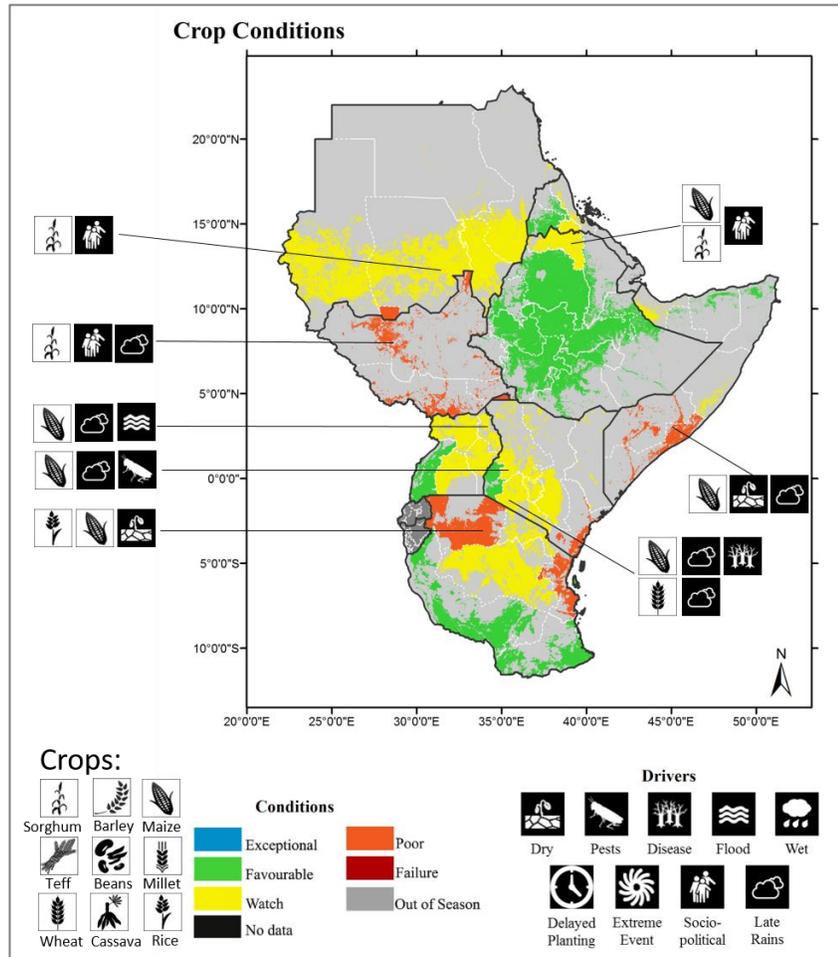




ICPAC

# EASTERN AFRICA CROP MONITOR



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**Dry Beans**

In the second quarter about **74,551 MT** was traded. This was a 30% decline compared to the first quarter. Regional Price Average was **USD 645/MT** in the second quarter, an 11% increase compared to the previous quarter

**Maize**

Cross Border Trade: **93,208 MT**, a 21% decline compared to the first quarter in Eastern Africa. Regional Price Average was **USD 303/MT** in the second quarter, a 13% increase compared to the previous quarter



[Bulletin Quick Access](#)

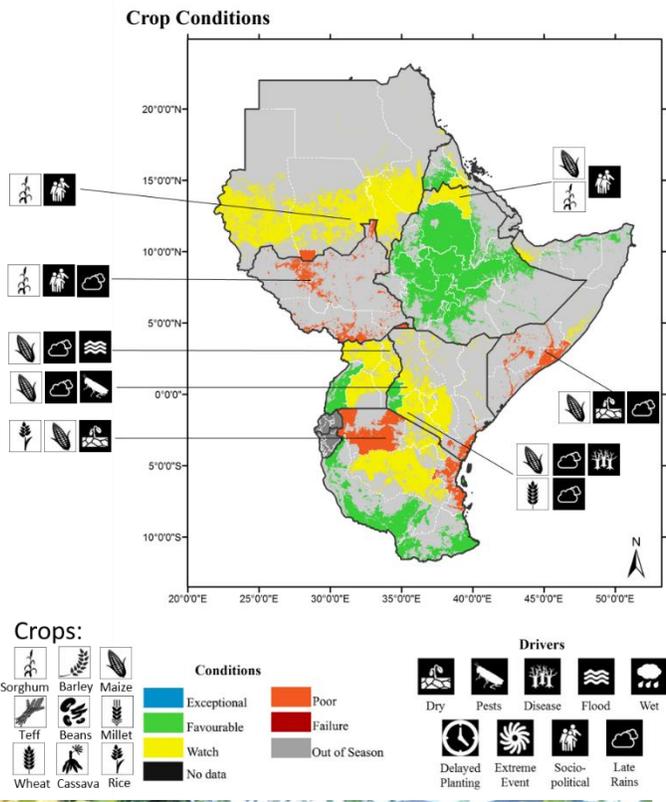
## Overview

**Climate:** March, April and May was characterized by below average, delayed start and poor performance rainfall in equatorial part of the region and delayed rainfall for June start of the season in northern region. This has an impact on agriculture with up to estimated 30-50% reduced crop yields due to irregular rains at critical stages of crop development.

**Crops:** The crop season was characterized by an aborted start in western equatorial part of the region and late rains in northern and eastern regions. This led to delay to planting and replanting in some parts of Uganda and western Kenya. In central Kenya and southern Somalia majority of the crops are currently in late vegetative and reproductive stage while in an average season should be in ripening and harvest stage. Tanzania which is in the end of the season has gone through a production deficit caused by dry spells and irregular rainfall distribution in high production areas.

**Trade:** In the second quarter, shortfalls in supply was noted in most markets in Uganda and Kenya resulting to significant increase in prices. In Burundi and Rwanda, prices of grain staples were relatively stable owing to improved availabilities from the second season harvest. In Tanzania, the *msimu* season harvest began in May for most grain staples with prices remaining stable amid increased regional demand. Prices are expected to trend seasonally but above last year's levels in Uganda and Kenya for maize and beans. In Tanzania, Uganda and Burundi, prices of maize and beans are likely to trend below the five year average due to ample stocks in the markets through the end of the year.

### Crop Conditions



The crop season was initially characterized by an aborted start in western parts of the equatorial part of the region and late rains in northern and eastern regions. This led to delay to planting and replanting in many parts of Uganda. Majority of the crops are currently in late vegetative and reproductive stage while in an average season should be in ripening stage.

**Burundi** beans were harvested in May and early June in Burundi and the harvest was favourable. The crop benefited from adequate rains in the season and no dry spells in season A. Most areas is in land preparation for season B which is expected from August.

**Rwanda** has received good rains which has been favourable to the crops. In *Maize* Fall arm worms was initially observed but the farmers applied pesticides on time which minimized spread and impact on crop. High production is expected. *Rice* benefited from high rains and higher than average harvest expected.



Beans Makamba Province South Burundi in late May showing prospects of good harvest



Maize Kamonye District Rwanda showing favourable to exception crop.

The harvest outlook for **Rwanda** and **Burundi** is favourable for Beans, Maize and Rice in the just concluded season-B crop.

In **Uganda** a false start occurred late Feb/early March which triggered planting, but this was followed by a 6-week dry spell. Rains resumed and stabilized late April/early May. Consequently, farmers planted at the start of the false rains early March, and thereafter suspended agricultural activities. The crops that were planted then either did not germinate, or germinated and became stunted. The dry spell also led to widespread delays in planting across most of the country. Replanting and fresh late planting resumed early May following moderate to heavy rains end of April. Estimated area

planted this season is between 20 and 40% below average, and the normal timeline for crop development has been delayed by approximately one month. In eastern and northern Uganda, crops that were replanted or planted late in late-April/early May and are now in their vegetative stages and will attain about 40-50% percent growth by end of June. Current crop conditions are favourable and continue to gradually improve with continued rains. In the southwest and parts of Central Region where rainfall performance was relatively better, crops currently vary from the early to late reproductive stages, attaining 50-80% growth by end of June. Crop conditions are fairly favourable across this region. Eastern (*Teso, Busoga, Sebei, Bukedi, Elgon*); crops are at different stages of growth, but crop conditions have significantly improved due to good rains since May. In *Karamoja*, the green belt regions (areas bordering *Teso, Lango, and Acholi*) crop conditions are favourable and are at late vegetative stages; however in the drier belts of *Karamoja*, crops are at various stages due to staggered planting, and planting of sorghum is still ongoing. There are episodes of heavy rains causing extensive flooding and water logging which may affect the crop. Crop production this season is estimated to be 30-50% below average, driven by severe March-April dry spell, reduced area planted, and Fall Army Worm which is prevalent, especially among late-planted maize crops which are still in their early vegetative stages and is damaging the shoots and tender leaves.

**Tanzania** has experienced a varying *msimu* seasonal rains with northern and north central parts experience lower rains as compared to long term mean. *Kilimanjaro* and *Arusha* area had depressed rains in start of April but the situation improved towards May and June. Maize conditions in Central Tanzania was reported as below average performance due to prolonged dry spell at the beginning of the season especially in areas of *Dodoma, Singida, and Tabora*. The western crop areas received normal rains which was favourable for crop production. Farmers in *Tanga, Morogoro, Dar es Salaam* and *Pwani* had to replant their crop with short cycle bean as an intervention to *msimu* rains variability. However, production is still below average in these areas.

In **Ethiopia** the *Belg* rains for the short season of February to May had mixed distribution with Northern highlands of *Tigray* receiving average rains but with dry spells which affected wheat and Teff crop. *Afar* received rains late and had longer extended dry spells in May which affected the sorghum crop for the short season. Central *Oromia* and *Oromia* regions had late rains, delayed planting and cases of pests on the maize crop which was largely addressed through traditional interventions. The crop yield performed below average. *Meher* season begun in June with enhanced rains in *Tigray, Amhara, Eastern Oromia* and *Oromia* regions. Planting was done and so far the crop shows favourable conditions in response to the rains. Political instability due to protests in northern parts may affect crop production in some areas.

**Eritrea** The western and south western parts of Eritrea received favourable and higher than average rains suitable for Sorghum. The coastal areas and *Debab* regions have received rainfall below average in most of June during the planting period. This may affect germination rates.

**Somalia** *Bay* region, middle and lower *Shabelle* have received *Gu* rainfall lower than long term averages for June. These are the areas that most sorghum and maize production happens. This may lower expected yield in the regions. *Togdheer, Sool, Sanaag, Bari* and *Nugal* regions received adequate *Gu* rainfall at the start of the season which is suitable for maize cultivation, even though the areas are not high production zones for the crop. June to September there is mainly a long dry season “*xagaa*” where most production is done in the irrigated croplands.

**Sudan's** season begun in mid-June with onset of the rains. The rains were timely and adequate and planting activities were done. However, due to extended political instability the crop condition is under watch since this affected farming due to the crisis. Currency weakening has affected fuel and other input availability and accessibility.

## Vegetation Conditions

### Progression of Vegetation Conditions in IGAD

Data Source: SPOT VGT/PROBA V NDVI

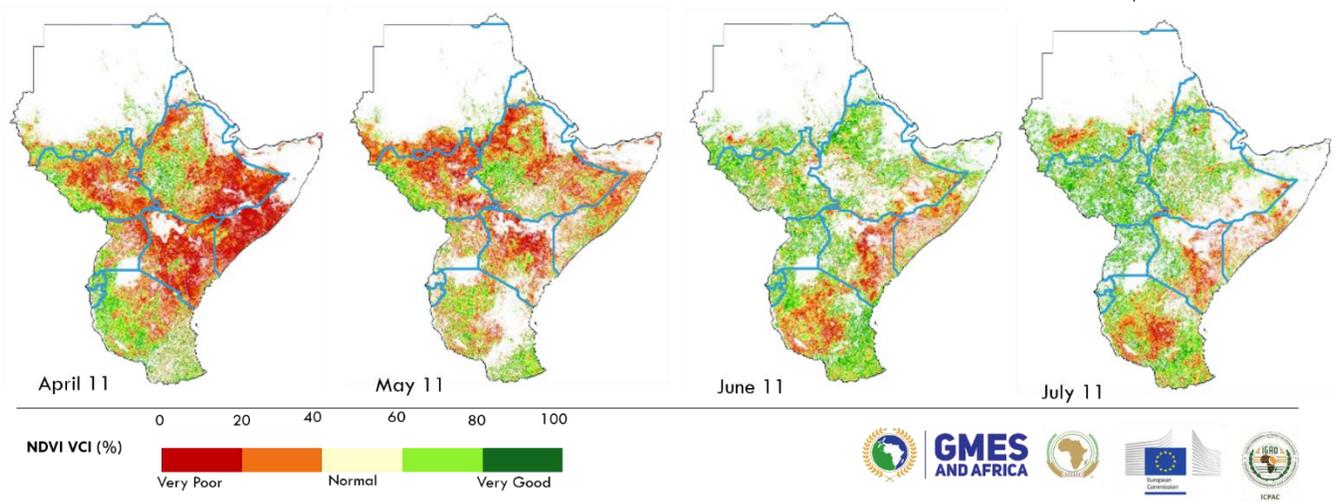
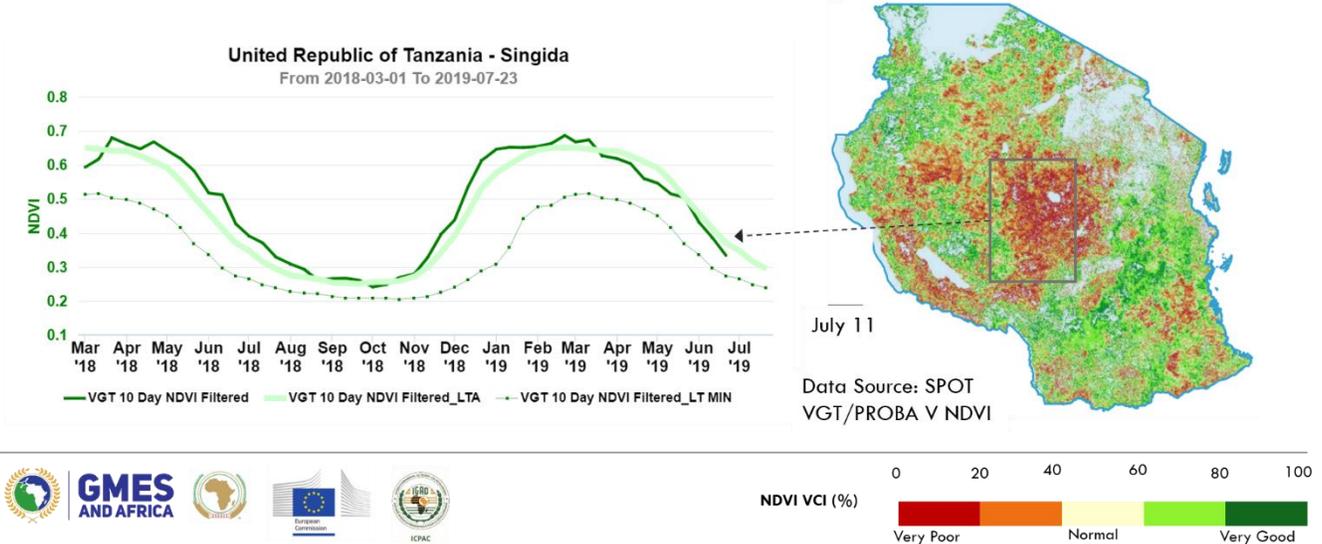


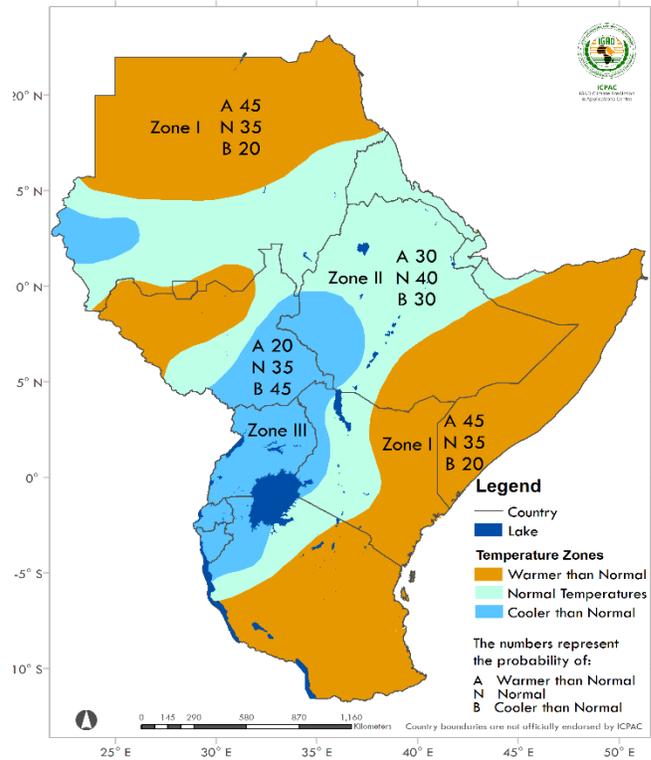
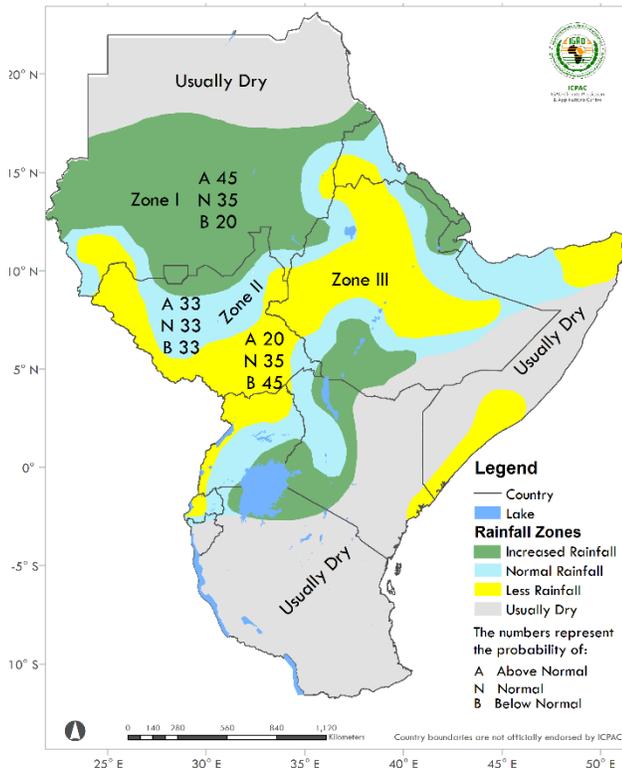
Figure 1: Vegetation conditions show Poor and Very Poor conditions in the months of April and May and recovery in June and July in most parts of Greater Horn of Africa

Vegetation anomalies show very poor conditions in April and May 2019 as compared to long term averages in the equatorial and northern parts of the region. This is due to the delayed rains and poor performance in most parts of the region in May-May. However recovery is seen in June and July by the substantial reduction of the orange and red zones in the map which represent poor and very poor conditions respectively. However, Tanzania, a surplus grain production area has had sustained poor conditions as seen in the figures below. Mostly affected is central Tanzania which current NDVI shows conditions below long term conditions and approaching all time worst conditions represented by long term minimum. This is due to poor performance of *msimu* rains and national crop analysts forecast below average production in maize and beans yield in that area.

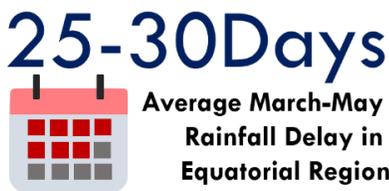
### Current Vegetation Conditions in Singida Tanzania



### Climate Analysis for June-September Season



There is an increased likelihood of drier than normal rainfall over much of **Ethiopia**, south-western **Eritrea**, **South Sudan**, parts of western **Sudan** as well as some region on the **Sudan/Ethiopia** border, northern and far western **Uganda**, western **Rwanda** as well as coastal areas of **Kenya** and **Somalia**. There is an increased likelihood of above normal rainfall over **Djibouti** and surrounding lowlands of **Ethiopia** and **Eritrea**, most parts of **Sudan**, parts of south-western **Ethiopia**, western **Kenya** and the Lake Victoria region of **Uganda** and **Tanzania**. The forecast also indicates a delay in the start of the rains by 1-3 weeks over the northern Rift Valley, the western equatorial sector, the coastal regions of **Kenya** and northern **Somalia**, and in **Sudan**.



There is also indication of a likelihood of early cessation over eastern **Ethiopia**, northern **Uganda**, and the cluster bordering **Ethiopia**, **South Sudan** and **Kenya**. These areas are also likely to experience long dry spells during the season. On the other hand, temperature forecast indicates increased likelihood of warmer than normal surface temperatures over much of the northern, eastern and south-eastern Greater Horn of Africa as well as a region over north-western **South Sudan**, while cooler to near normal temperatures are indicated across central parts of the Greater Horn of Africa. The highlands of the equatorial sector are expected to experience cool and cloudy conditions during June to September 2019 period.

More Information & Climate Products: [www.icpac.net](http://www.icpac.net)

## Regional Grain Markets and Trade Overview

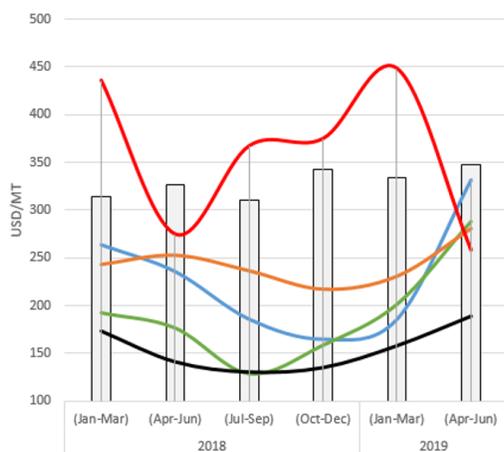
### Overview

In the second quarter, shortfalls in supply was noted in most markets in Uganda and Kenya resulting to significant increase in prices. In Burundi and Rwanda, prices of grain staples were relatively stable owing to improved availabilities from the second season harvest. In Tanzania, the msimu season harvest began in May for most grain staples with prices remaining stable amid increased regional demand.

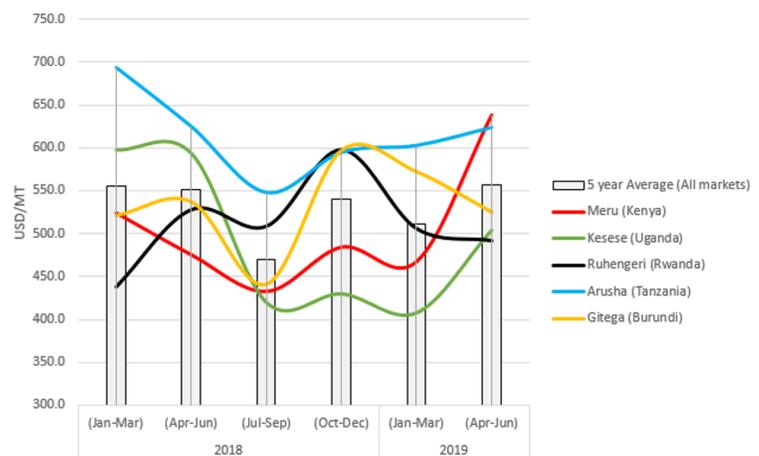
### Markets Notes

**Maize:** In **Uganda**, prices gained on account of tightened supply in the second quarter. Supply remained relatively stable in **Rwanda** but expected to decline in the coming quarter due to the ongoing harvest. In **Burundi** and **Tanzania**, prices generally declined with stocks reported to be ample, a further decline in prices is expected with inbound stock from June harvest. In **Kenya** and **Uganda**, tightened in the second quarter increased demand pressure significant with price gains observed in all the monitored markets. Prices are expected to trend above last year's levels in the coming quarter following lower crop expectations.

**Beans:** Supply in **Rwanda** tightened in the second quarter with prices increasing in the second quarter. Trade between Uganda and Rwanda was low following the closure of custom borders. In **Kenya**, imports from the region improved supply since domestic stocks had declined significantly. However, prices remained elevated in Kisumu at USD 712/MT, a 17 percent increase quarter-on-quarter. The delay of the first season harvest in **Uganda** had a bearing on supply. Prices were higher than average in the second quarter. In **Tanzania**, the ongoing harvest of the first season crop lifted supply expectations in the southern highlands however in the northern region, the imminent harvest in the central region is expected at below average. In **Burundi**, prices were stable due to ample stocks from recently gathered harvest.



Wholesale Maize Prices (USD/MT) in selected producer markets in East Africa. Source: EAGC RATIN



Wholesale Beans Prices (USD/MT) in selected producer markets in East Africa. Source: EAGC RATIN

### Grain Trade Notes

**Maize:** Volumes traded through the monitored trade corridors contracted by 21% compared to a similar period last year as stocks declined in surplus producer **Uganda** and besides, trade restrictions between **Rwanda** and **Uganda** have persisted since March 2019. **Tanzania** exports to Kenya increased by 20 percent to 25,997 MT as stocks were ample in Tanzania markets in the second quarter. With improved availability in Tanzania as a result of the *msimu* harvest, Kenya is likely to import more from the northern markets of Tanzania than from Uganda where there are concerns over potential shortages following poor seasonal rains.

**Uganda** exports to Kenya were 84 percent lower than average indicative of low supplies. Trade between Uganda and the western markets of Kenya is expected to increase seasonally in the third quarter. Exports from **Uganda** to **South Sudan** increased by 16 percent compared to the first quarter. This could be attributed to a reduction in conflicts since the signing

of the peace accord last year. Prevailing peace has resulted in lower risk and marketing cost for traders. There are concerns on the potential below average and delayed harvests in **Kenya**, **Uganda**, and **South Sudan**. Potential shortages in an otherwise typically surplus producing **Uganda** will necessitate the region to consider importing outside Eastern Africa.

Average Quarterly wholesale prices of Maize Grain in selected markets in Eastern Africa (USD/MT). Source: EAGC RATIN

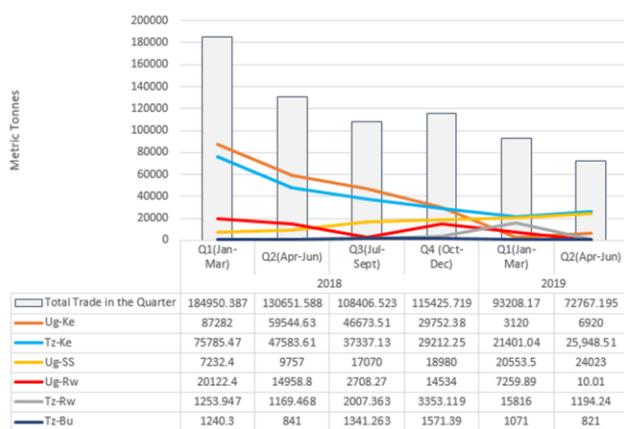
Market	2019 Apr-Jun Average	Percentage Change		
		Five year average	Previous Quarter	Same quarter last year
Kamembe (Rwanda)	211	-	9 ▲	-11 ▼
Ruhengeri (Rwanda)	281	-16 ▼	19 ▲	11 ▲
Kigali (Rwanda)	238	-39 ▼	5 ▲	21 ▲
Ngozi (Burundi)	280	-	-29 ▼	-17 ▼
Gitega (Burundi)	258	-21 ▼	-34 ▼	-6 ▼
Dar es Sal. (Tanzania)	260	-31 ▼	-6 ▼	-2 ▲
Mwanza (Tanzania)	217	-	-11 ▼	-4 ▲
Iringa (Tanzania)	203	-53 ▼	1 ▲	19 ▲
Lira (Uganda)	289	-7 ▼	44 ▲	64 ▲
Kampala (Uganda)	303	-4 ▲	44 ▲	60 ▲
Busia (Uganda)	309	-4 ▲	42 ▲	51 ▲
Kisumu (Kenya)	408	-2 ▲	40 ▲	20 ▲
Nairobi (Kenya)	351	-10 ▼	31 ▲	8 ▲
Nakuru (Kenya)	332	-8 ▼	78 ▲	41 ▲

Average Quarterly wholesale prices of Beans in selected markets in Eastern Africa (USD/MT). Source: EAGC RATIN

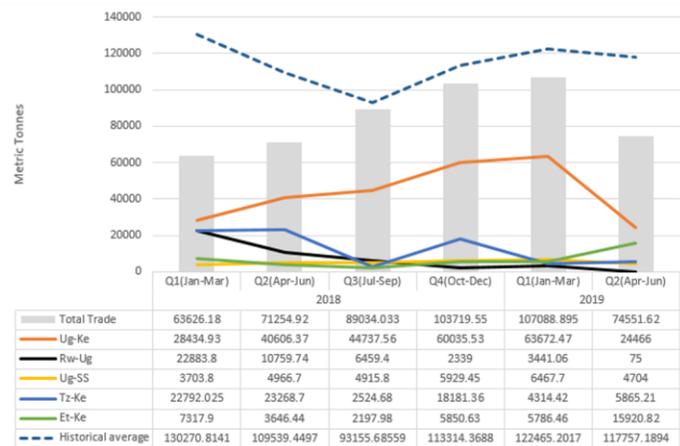
Market	2019 Apr-Jun Average	Percentage Change		
		Five year average	Previous Quarter	Same quarter last year
Kamembe (Rwanda)	454	-	24 ▲	23 ▲
Ruhengeri (Rwanda)	492	-	12 ▲	2 ▲
Kigali (Rwanda)	482	-12 ▼	3 ▲	-2 ▲
Ngozi (Burundi)	575	-	6 ▲	22 ▲
Gitega (Burundi)	525	-	-7 ▼	7 ▲
Dar es Sal. (Tanzania)	829	-15 ▼	-11 ▼	-11 ▼
Mwanza (Tanzania)	658	-	-2 ▼	-12 ▼
Iringa (Tanzania)	756	-	-3 ▲	-5 ▲
Kasese (Uganda)	504	-14 ▼	24 ▲	-15 ▼
Kampala (Uganda)	678	-32 ▼	29 ▲	15 ▲
Busia (Uganda)	595	-10 ▼	29 ▲	42 ▲
Kisumu (Kenya)	712	-8 ▼	17 ▲	11 ▲
Meru (Kenya)	639	-17 ▼	37 ▲	35 ▲
Nairobi (Kenya)	552	-31 ▼	16 ▲	-31 ▼

**Beans:** Compared to the previous quarter, trade in the region declined by 30 percent to about 74,551.62 MT as stocks tightened seasonally in surplus producer countries. Harvest in the region begins in earnest around May in Tanzania and Uganda however; late onset of rains in the region had a significant bearing on supply especially in **Uganda** where much of the cropping areas had not begun harvesting by end of the quarter. Due to low production late last year in **Uganda**, stocks tightening earlier than usual, exports to **Kenya** and **South Sudan** declined by about 62 and 27 percent respectively. Trade with **Rwanda** decreased because of restrictions on commodity movement in the gazetted borders (**Cyanika** and **Gatuna**). Trade is expected to peak in the third quarter as domestic availabilities improve however, demand from **South Sudan**, a deficit producer is expected to increase.

Quarterly Sum of Formal and Informal Cross Border Trade of Maize Grain in Maize Trade Corridors in Eastern Africa. Source EAGC RATIN and FEWS NET



Quarterly Sum of Formal and Informal Cross Border Trade of Beans in Maize Trade Corridors in Eastern Africa. Source EAGC RATIN and FEWS NET



More Information: <http://www.ratin.net>

## Definitions

### Crop Conditions:

**Exceptional:** Conditions are much better than average\* at time of reporting. This label is only used during the grain-filling through harvest stages.

**Favourable:** Conditions range from slightly lower to slightly better than average\* at reporting time.

**Watch:** Conditions are not far from average\* but there is a potential risk to final production. The crop can still recover to average or near average conditions if the ground situation improves. This label is only used during the planting-early vegetative and the vegetative-reproductive stages.

**Poor:** Crop conditions are well below average. Crop yields are likely to be 10-25% below average. This is used when crops are stunted and are not likely to recover, and impact on production is likely.

**Failure:** Crop conditions are extremely poor. Crop yields are likely to be 25% or more below average.

**Out of Season:** Crops are not currently planted or in development during this time.

**No Data:** No reliable source of data is available at this time.

*"Average" refers to the average conditions over the past 5 years.*



### Drivers:

*These represent the key climatic drivers that are having an impact on crop condition status. They result in production impacts and can act as either positive or negative drivers of crop conditions.*

**Wet:** Higher than average wetness.

**Dry:** Drier than average.

**Hot:** Hotter than average.

**Cool:** Cooler than average or risk of frost damage.

**Extreme Events:** This is a catch-all for all other climate risks (i.e. hurricane, typhoon, frost, hail, winterkill, wind damage, etc.)

**Delayed-Onset:** Late start of the season.

**Pest & Disease:** Destructive insects, birds, animals, or plant disease.

**Socio-economic:** Social or economic factors that impact crop conditions (i.e. policy changes, agricultural subsidies, government intervention, etc.)

**Conflict:** Armed conflict or civil unrest that is preventing the planting, working, or harvesting of the fields by the farmers.

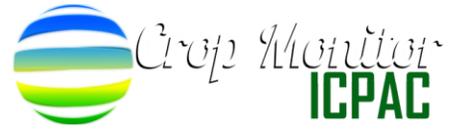




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IGAD Climate Prediction  
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**GEMES  
AND AFRICA**



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Application Center

Partners



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FOR INFORMED AGRICULTURAL DECISIONS

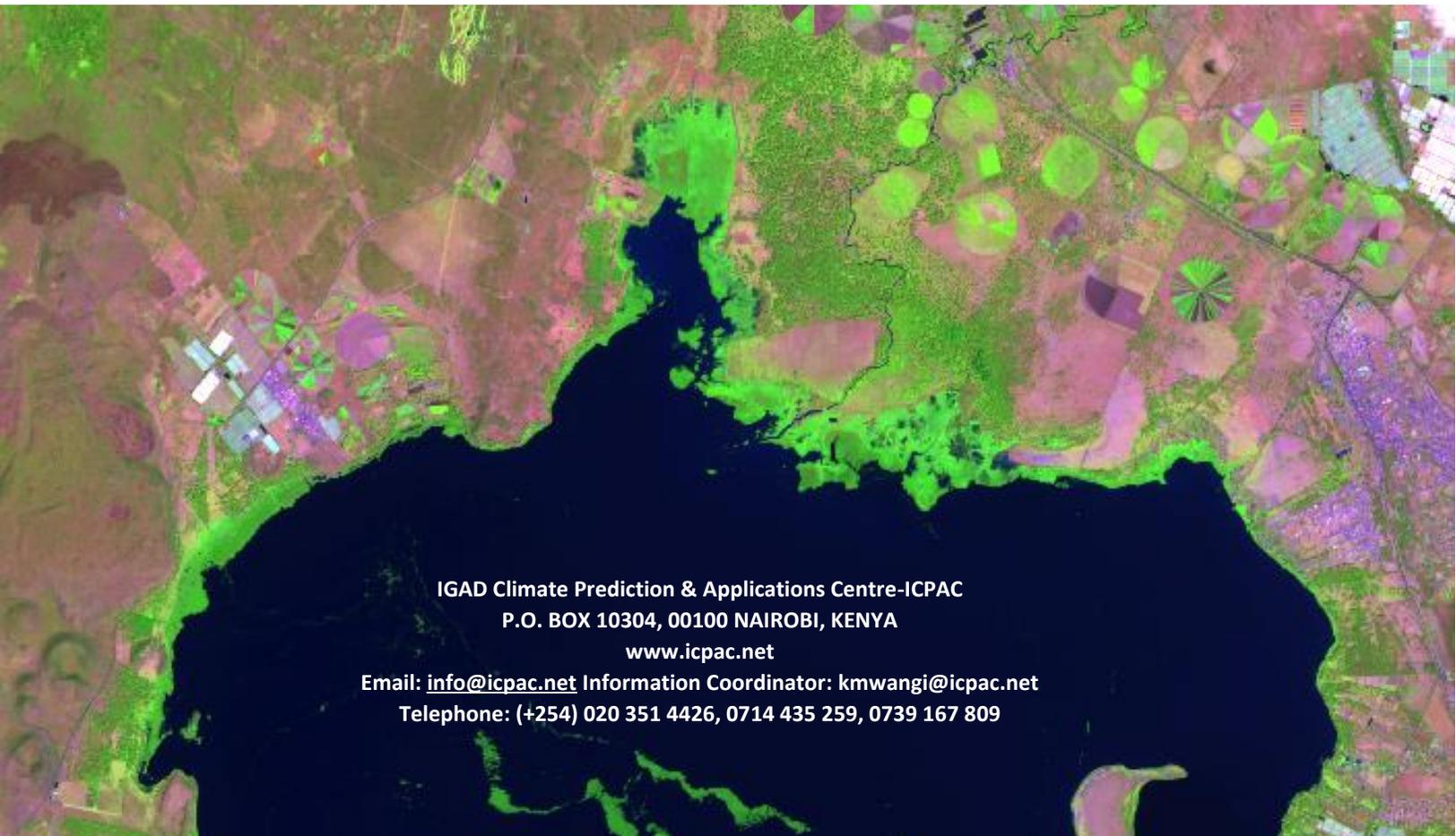


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