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## INTRODUCTION

This report provides a comprehensive analysis of the grain commodity market across East Africa. Key areas of focus include regional climate and crop conditions, country-specific outlooks, cross-border trade dynamics, price movements, and future projections. The primary commodities analyzed are maize, sorghum, rice, millet, and dry beans. The cross-border trade data and market price data in the report were sourced from EAGC-RATIN and FEWSNET.



## Regional Climate and Crop Summary Update

In Q3 2024, East Africa's grain production was shaped by varying rainfall patterns. In Kenya, early rainfall in the north and central regions contrasted with poor rainfall in eastern areas, affecting sorghum harvests grown during the long rains. Meanwhile, land preparation for short rains cereals was ongoing, but below-average rainfall was forecasted, which would likely to lower yields. In the Rift Valley, erratic rains delayed maize harvests, tightening supplies.

Although adequate rainfall in the unimodal western region helped, 2024's maize production was expected to fall by 5–10% below average, due to poor outcomes along the coast. Uganda's first-season harvest was favorable, and second-season planting was progressing well. In Rwanda, dry conditions threatened Season A maize planting, while Burundi and Tanzania prepared for planting (*Crop Monitor Report No. 98*).

## Regional Grain Market Outlook

The grain sector saw mixed outcomes in Q3 2024. Kenya faced high prices from delayed harvests and supply shortages, while Uganda and Tanzania's production and prices were stable. Ethiopia's pulse market saw price rises

despite good growing conditions, with localized flooding causing supply issues. Regional trade helped cushion markets, but price fluctuations were expected due to delayed harvests.

## Country Outlook

### KENYA

- Maize prices surged in Nairobi and Mombasa due to delayed harvests and limited domestic supply, exacerbated by strong demand.
- Beans and green grams experienced steep price hikes, particularly in regions like Taita Taveta, as poor weather hindered yields.
- Sorghum and millet also saw price increases, largely due to their role as maize substitutes when maize prices spiked.

### UGANDA

- Stable weather conditions kept maize, beans, and sorghum prices steady across markets like Kampala and Gulu. Uganda's strong production allowed it to export maize to Kenya, cushioning Kenyan markets from even higher price spikes.
- Groundnuts and other minor crops showed stable pricing trends, thanks to sufficient domestic supply.





## Country Outlook

### TANZANIA

- Maize prices remained lower in Tanzania, driven by good harvests earlier in the quarter. However, by September, supply constraints began to push prices upward, particularly in Dar es Salaam and Dodoma.
- Rice and beans maintained stable prices, benefiting from favorable weather and strong domestic production, helping Tanzania maintain lower price fluctuations compared to its neighbors.

### ETHIOPIA

- Ethiopia's agricultural conditions were favorable overall, especially during the **Meher season** harvest. While good rains supported crop growth, localized flooding impacted yields in some areas.
- **Pulse Market Prices:** Prices for pulses like **green mung beans** and **speckled beans** rose gradually through 2023, with green mung beans reaching \$0.75/kg by Q3. In 2024, **soya beans** and **round white pea beans** saw price increases in Q1 but eased slightly by Q3.
- **Market Variability:** Markets such as **Nazareth** and **Kombolcha** reported consistently higher prices, while others like **WolaytaSodo Grain** remained more stable. Ethiopian prices remained competitive within East Africa, though selected regions reflected higher prices due to demand and trade influences.

## Regional Cross-border Overview



### Maize

Tanzania's surplus maize harvest and stocks pushed exports up. Traders sold 312,000 MT, a drop from Q2 but still 32% higher than average and 193% above Q3 2023 levels. Tanzania (78%) and Uganda (17%) led exports, mostly to Kenya (86%). Burundi's imports rose 278% due to deficits, while Ethiopia and Somalia saw increased trade to cover shortages.

Maize Exports by Country (Q3 2024)

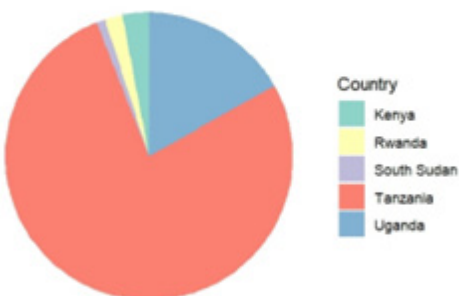


Figure 1 - Maize Exports

Source: EAGC RATIN and FEWSNET



### Sorghum

Ethiopia and Uganda dominated exports (31% and 57%, respectively). Rwanda (34%) and South Sudan (28%) were key buyers. Ethiopian exports to South Sudan grew due to Sudan's disruptions. Brewing industries in Rwanda and domestic refugee needs in Uganda shaped demand.

Sorghum Exports by Country (Q3 2024)

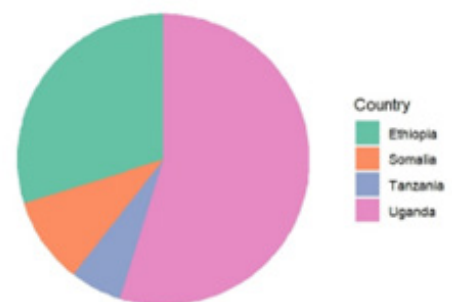


Figure 2 - Sorghum Exports by Country

Source: EAGC RATIN and FEWSNET

## Regional Cross-border Overview



Rice

Tanzania supplied 75% of rice exports, driven by abundant harvests. Kenya and DRC imports increased, with DRC receiving 30,000 MT. Somalia and Ethiopia also re-exported rice, which highlighted active regional trade.

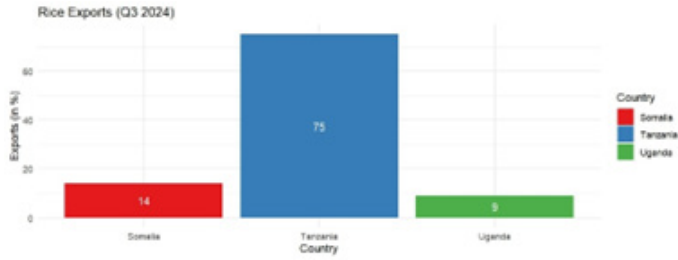


Figure 3 - Rice Imports

Source: EAGC RATIN



Beans

Kenya was the biggest importer of beans and maize. For beans, Kenya imported 25,884.542 units formally and 6,952.411 units informally. Uganda imported 30,609.5 units informally, while Tanzania's imports were very small. For maize, Kenya again led with 259,228.8 metric tons formally and 8,864.007 units informally. Uganda and Tanzania had small imports, with Uganda at 80 units and Tanzania at 2,300 units.



## Beans Market Overview (Q3 2024)

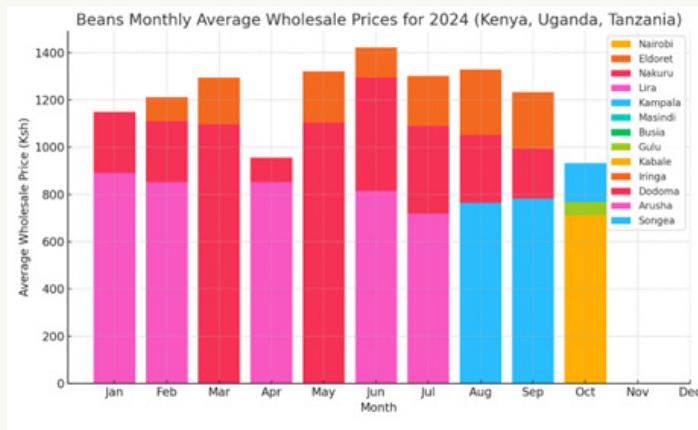


Figure 4 - Beans Monthly Average Wholesale Prices

Source: EAGC RATIN

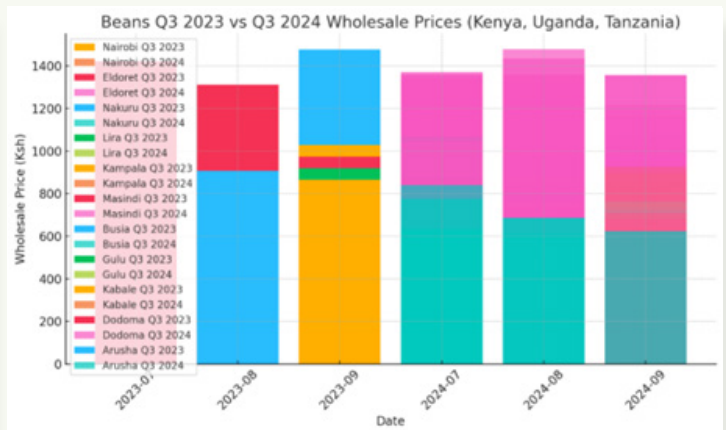


Figure 5 - Beans Q3 2023 vs Q3 2024

Source: EAGC RATIN

In 2023, bean prices in Kenya's urban markets, especially in Nairobi and Mombasa, rose dramatically, due to high demand and poor harvests caused by irregular weather. Nairobi had the biggest price increase. Uganda's markets, like Kampala and Gulu, saw only small price increases because of steady bean production and good weather. Uganda's exports helped keep prices stable in Kenya. Tanzania, with strong agricultural production, had the least price changes, with stable prices in Dar es Salaam and Dodoma from Q3 2023 to Q3 2024. Overall, Kenya had the highest prices, while Uganda and Tanzania had lower, more stable prices.

## Ethiopia Pulses Price Analysis

In Ethiopia, the wholesale prices of pulses exhibit notable variations across different commodities and markets over time.

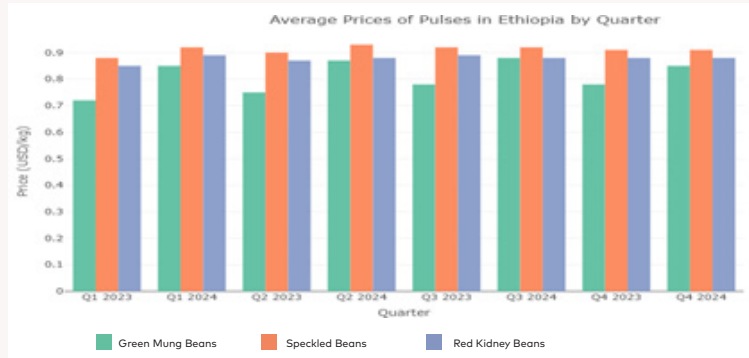


Figure 6 - Average Prices of Pulses

Source: EAGC RATIN

Average prices over quarters: In 2023, prices were relatively stable in Q3, with green mung beans at \$0.85/kg and speckled beans at \$0.90/kg. However, in Q4, prices for commodities like speckled beans surged to \$1.04/kg, while red kidney beans were \$0.88/kg.

In 2024, pulse prices continued to vary:

- **Q1:** Soya beans rose to \$0.52/kg and round white pea beans to \$0.91/kg.
- **Q2:** Prices for green mung beans and speckled beans remained elevated, at \$0.79/kg and \$0.53/kg, respectively.
- **Q3:** Red kidney beans and soya beans saw a slight decrease by Q3, with green mung bean at \$0.45/kg

## Market-Level Price Trends

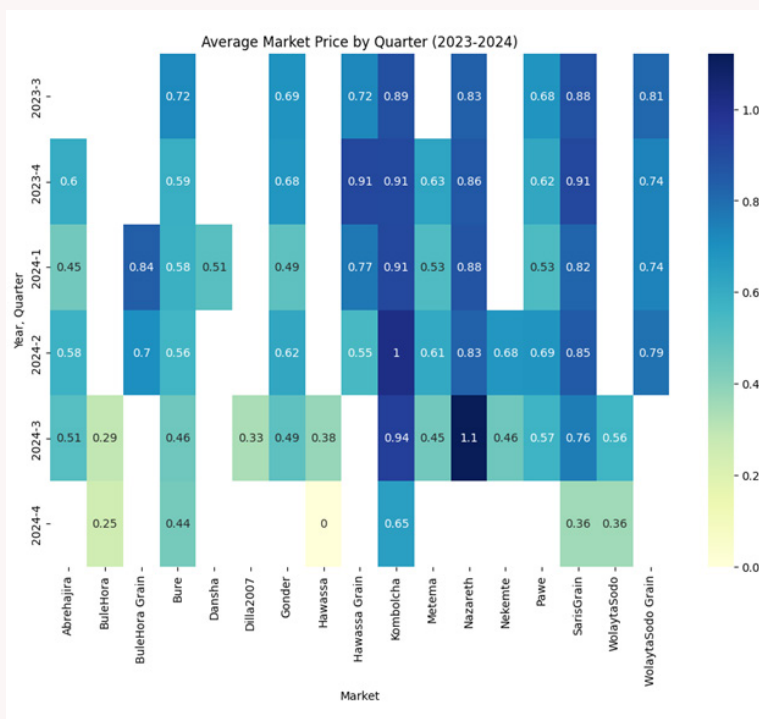


Figure 7 - Average Market Price

Source: EAGC RATIN

- **2023 Q3:** Kombolcha recorded the highest price at \$0.89/kg, while Bure had the lowest at \$0.72/kg. The quarter saw relatively stable prices, with Kombolcha maintaining a premium due to high demand.
- **2023 Q4:** Kombolcha continued as the most expensive market with prices increasing to \$0.91/kg. Meanwhile, Bure experienced a significant decrease to \$0.59/kg, possibly due to surplus supply or reduced demand.
- **2024 Q1:** Kombolcha again led with \$0.91/kg, while Abrehajira posted the lowest price at \$0.45/kg. The spread reflects Kombolcha's sustained demand, while Abrehajira saw market adjustments.
- **2024 Q2:** Kombolcha reached the highest price across all quarters at \$1.01/kg, with BuleHora Grain being the lowest at \$0.70/kg. The quarter's price surge in Kombolcha suggests peak demand or supply constraints.
- **2024 Q3:** Nazareth became the most expensive market, with prices peaking at \$1.12/kg. BuleHora saw a drastic price drop to \$0.29/kg, indicating possibly oversupplied or lower-quality pulses.

Ethiopian pulse prices have displayed considerable variability from 2023 to 2024, fluctuations across different markets reflected local supply and demand dynamics.



## Maize Market Overview (Q3 2024)

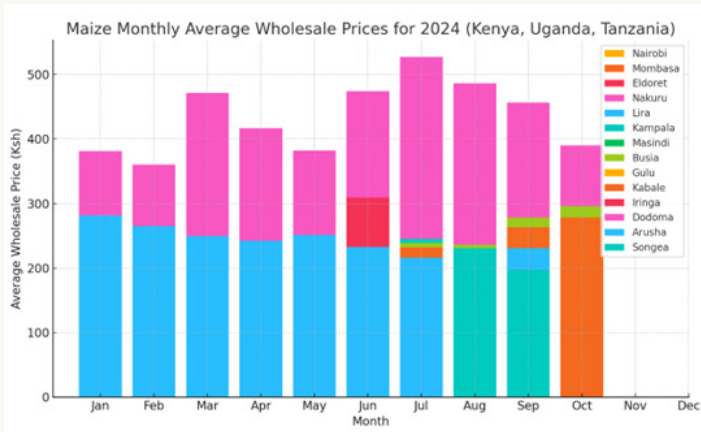


Figure 8 - Maize monthly average wholesale Prices for 2024

Source: EAGC RATIN

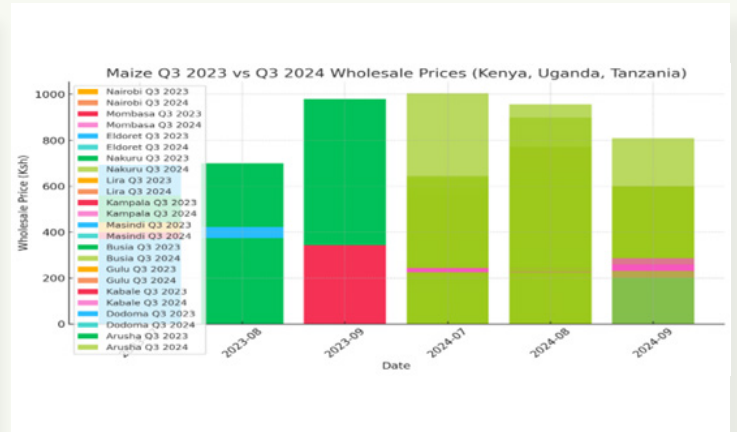


Figure 9 - Maize Q3 2023 vs Q3 2024 Wholesale Prices

Source: EAGC RATIN

Kenya, especially in cities like Nairobi and Mombasa, experienced sharp maize price increases in Q3 2024, driven by erratic rainfall, delayed harvests, and high demand. The production challenges in the Rift Valley further worsened the supply shortage. In contrast, Uganda's markets, such as Kampala and Lira, had stable and lower prices, supported by favorable weather and surplus production, enabling maize exports to Kenya. Tanzania also maintained lower and more stable prices in cities like Dar es Salaam and Dodoma. Overall, regional trade, especially from Uganda, helped ease Kenya's price volatility.



## Rice Market Overview (Q3 2024)

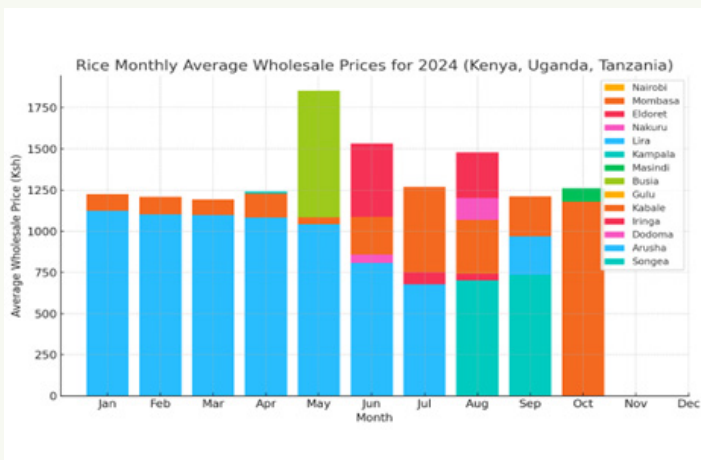


Figure 10 - Rice Monthly Average Wholesale Prices

Source: EAGC RATIN

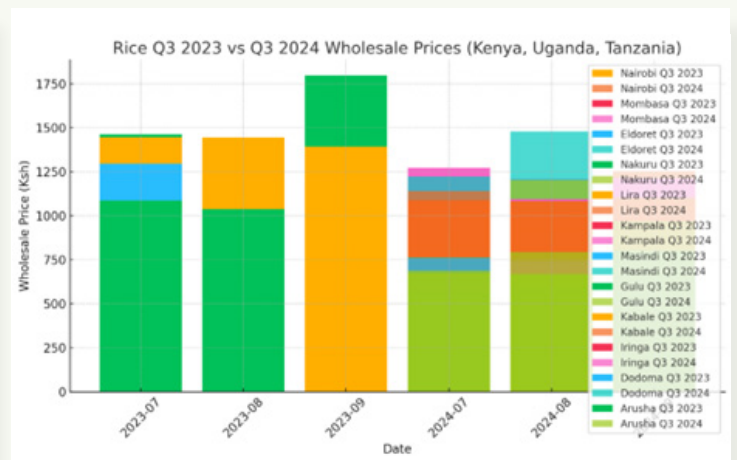


Figure 11 - Rice Q3 2023 vs Q3 2024 Wholesale Prices

Source: EAGC RATIN

In Q3 2024, rice prices surged in Kenya, particularly in Nairobi and Mombasa, Uganda experienced more stable prices benefiting from domestic production and regional trade with Tanzania, which helped mitigate price spikes. Kampala and Busia reported slightly higher prices due to demand and cross-border trade. Tanzania exhibited the most stability, with minimal price changes between Q3 2023 and Q3 2024, thanks to strong local production, and favorable weather. Overall, Kenya faced the highest price increases, while Uganda and Tanzania maintained more stable and lower prices, benefiting from local production and regional trade.



## Sorghum Market Overview (Q3 2024)

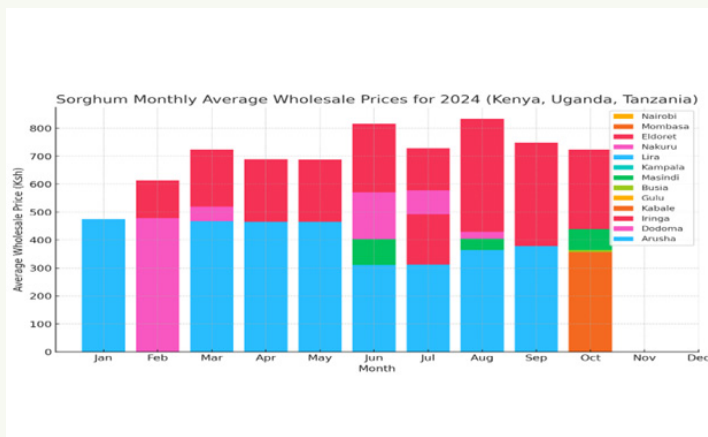


Figure 12 - Sorghum Monthly Average Wholesale Prices 2024

Source: EAGC RATIN

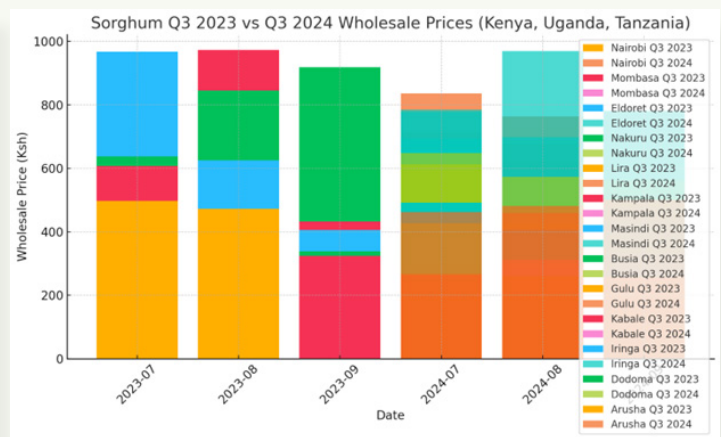


Figure 13 - Sorghum Q3 2023 vs Q3 2024 Wholesale Prices

Source: EAGC RATIN

In Q3 2024, sorghum prices varied across Kenya, Uganda, and Tanzania.

- **Kenya:** Urban markets like Nairobi and Mombasa saw higher prices due to strong demand for sorghum as a food staple, in beverages, and as animal feed. Poor weather and reduced production drove the increase, continuing a trend from Q3 2023.
- **Uganda:** Markets like Kampala and Gulu had stable prices, thanks to steady production and surpluses that supported exports to Kenya. Prices showed only minor changes between Q3 2023 and Q3 2024.
- **Tanzania:** Markets such as Dar es Salaam and Dodoma experienced the lowest and most stable prices, thanks to strong harvests and favorable weather, with minimal differences from Q3 2023.

## Grain Market Outlook for Q4 2024

Mixed weather conditions were to be expected in Q4 2024 due to climatic patterns that were ongoing (Crop Monitor Report No. 98). Above-average rains and flooding could continue in northeastern Ethiopia, while the Eastern Horn could see below-normal October-November-December (OND) rainfall due to a developing La Niña, and negative

Indian Ocean Dipole. Increased rainfall in western Ethiopia heightens flood risks, while southeastern Ethiopia could face severe cropping challenges, due to drier-than-average conditions. Temperature anomalies in southern areas could worsened the dry spell's impact, highlighting the need for adaptive strategies.

### Impact of Currency Exchange Rates on grain trade in the East Africa region in 2024

#### Kenyan Shilling (KES):

- **Higher Import Costs:** The KES depreciation meant higher import costs, affecting the prices of staple foods, including sorghum, maize, and rice. The situation led to increased domestic prices and inflation.
- **Increased Exports:** A weaker KES could have benefited Kenyan exports, making them more competitive abroad. However, challenges in production could have offset that advantage.

#### Ugandan Shilling (UGX):

- **Stable Trade Environment:** The stability of the UGX supported predictable pricing for imports and exports. Uganda's strong agricultural sector enabled it to export surplus products, helping stabilize regional prices.
- **Impact on Imports:** Minor fluctuations could have affected the cost of imported goods, but Uganda is less reliant on imports than Kenya.

#### Tanzanian Shilling (TZS):

- **Moderate Depreciation:** Continued depreciation of the TZS could have led to rising costs for imported agricultural inputs, impacting local production costs. However, strong domestic production kept local prices relatively stable.
- **Regional Trade Dynamics:** TZS depreciation could have made Tanzanian products more attractive in regional markets, supporting exports.

#### Ethiopian Birr (ETB):

- **Severe Trade Pressures:** The sharp depreciation of the ETB could have exacerbated Ethiopia's reliance on imports, leading to higher prices and potential food insecurity. Limited foreign currency reserved constrained trade capacity.



## About the Eastern Africa Grain Council

The Eastern Africa Grain Council (EAGC) is a membership-based organization representing the grain sector in Eastern and Southern Africa. The Council exists to facilitate efficient, structured, profitable and inclusive grain trade in its 10 mandate countries, namely Kenya (Regional Headquarters), Uganda, Tanzania, South Sudan, Ethiopia, Burundi, Rwanda, Zambia, Malawi and the Democratic Republic of Congo.

EAGC draws its membership from grain sector value chain actors in its Member States, which include farmers, traders and processors. Support service providers and complimentary sectors such as agro-input suppliers, financial services and animal feed manufacturers also form part of the Membership. In facilitating structured grain trade in the Eastern Africa region, EAGC provides trade facilitation services through the EAGC G-Soko Grain Trading System; market and cross-border trade information through the Regional Agricultural Trade Intelligence Network (RATIN – [www.ratin.net](http://www.ratin.net)); pursuing appropriate policy reforms to support growth of structured grain trade through the Agricultural Trade Policy Advisory Forum for Eastern and Southern Africa (ATPAFESA); and capacity building of grain industry stakeholders through the Grain Business Institute (GBI).

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