



EAST AFRICA GRAIN MARKETS AND TRADE

May Report, Issued on 9th June 2018.

Issue no. 0006

Highlights

In Eastern Africa, staple grain prices decreased in most of the monitored markets with harvest from Uganda and Tanzania easing pressure on demand.

Burundi: Supply was reported to be tightened for maize and beans, however, early harvest B season crop is expected to ease demand on the commodities.

Kenya: The price of grains remained relatively stable in the monitored with supply reported to be adequate. Prices are expected to decrease in June as Tanzania, a key source for grains will be harvesting.

Tanzania: Prices have decreased seasonally with improving stocks realized from the Southern Unimodal zone. Prices are expected to decrease in the coming month as harvest (Maize, Rice, and Beans) is expected to be above average

Uganda: Prices of grains are on a downward trend with inbound-ing Second/South season crop.

Rwanda: Prices of grains gained marginally with supply reported to be adequate in the markets. Early season B harvest will shore up supplies in June.

Contents

1.0 Markets	1
1.1 Informal Cross Border Trade.....	1
2.0 Crop Season Update.....	2
3.0 East Africa Grain Markets.....	3
3.1 Kenya.....	3
3.2 Rwanda.....	4
3.3 Uganda.....	6
3.4 Tanzania.....	7
3.5 Burundi.....	9

1.0 Markets

Markets Overview: In May prices of grains went down slightly as new stocks realized from the ongoing harvest in Uganda and Tanzania. In Kenya, last season stocks and imports from Uganda have maintained the price of maize below the five-year average with a downward trend observed since March. In Uganda, prices have decreased significantly from last month's average with anticipated improvement in the supply of maize and beans from the southern region of the country. In Tanzania, the Msimu crop is currently being harvested in the southern bimodal zone, therefore, demand pressure on rice, beans, and maize is expected to ease significantly. In Burundi and Rwanda, demand for maize remained high with harvest from the South of DRC meeting demand in the Great Lakes. Prices are expected to go down in DRC, Burundi and Rwanda as harvest of Maize, Beans, and Sorghum intensify in June as the latter two countries will be harvesting.

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

Commodity	Location	Apr 2018	May 2018	% change	
Maize	Nairobi	313	328	15(4.8%)	▲
	Kampala	194	184	-10(-5.2%)	▼
	Dar es Sal.	266	259	(-2.6%)	▼
	Kigali	198	190	-8(-40%)	▼
	Bujumbura	432	427	-5(-1.2%)	▼
Rice	Kampala	1,023	1063	40(3.9%)	▲
	Kigali	921	917	-4(-0.4%)	▼
	Bujumbura	895	839	-56(-6.3%)	▼
Red Sorghum	Nairobi	474	502	28(5.9%)	▲
	Kampala	239	226	-13(-5.4%)	▼
	Dar es Sal.	354	334	-20(-5.6%)	▼
	Kigali	389	395	6(1.5%)	▲
	Bujumbura	557	545	-12(-2.2%)	▼
Wheat	Dar es Sal.	535	532	-19(-3.4%)	▼
	Mulindi-Kigali	567	634	15(2.4%)	▲
	Bujumbura	882	866	7(0.8%)	▲
Mixed Beans	Kampala	498	456	-67(-12.8%)	▲
	Dar es Sal.	678	741	77(11.6%)	▲
	Mulindi-Kigali	478	536	20(3.9%)	▲
	Bujumbura	407	495	84(20.4%)	▲

1.1 Informal Cross-Border Trade

Maize: In May, maize stocks were adequate in the monitored markets with trade slowing down in the region; imports from Uganda into Rwanda declined by 26% (1670.2MT) with the trend is expected to persist with new stocks from the first season harvest expected next month. Imports from Uganda into Kenya increased slightly by 2.1%(450MT) as 23,015MT was recorded in May; domestic stocks are still adequate in the bread basket (North rift region) as last season crop was still in storage. Inflows from Tanzania were atypically low in May with a 38.5%(1,098MT) decrease recorded from previous month's volume through Namanga and Isibania borders; this has been attributed to the exceptional performance of last season's crop in the western and South Rift region coupled with imports from Uganda.

Rice: Tanzania is the primary source of rice in the region. Trade between Tanzania and Uganda increased significantly by 527% as harvest season is underway in the northeastern region with demand remaining high within the great lakes. In Rwanda, imports from Tanzania have decreased by 19.8% (601.1MT) as the second wet season crop is currently being harvested. Imports from Tanzania are expected to increase seasonally in June as much of the production in the southern region will have been harvested.

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

Commodity	Source	Dest.	Apr 2018	May 2018	% Change	
Maize	Uganda	Rwanda	6,379.4	4,709.19	-1,670.2(-26%)	▼
	Uganda	Kenya	22,545.2	23,015.3	470.06(2.1%)	▲
	Tanzania	Kenya	2,851	1,753	-1,098(-38.5%)	▼
	Rwanda	DRC	1,553.8	1,661.6	107.8 (6.9%)	▲
	Zambia	Tanzania	66	34	-32 (48.5%)	▼
Beans	Uganda	DRC	538.72	1,068.49	519.7(94.7%)	▲
	Rwanda	Uganda	4,968.6	3,135.14	-1,833 (-36.9%)	▼
	Uganda	Kenya	10,874.2	12,602	1,728(15.9%)	▲
	Tanzania	Uganda	622	48	-574(92.3%)	▼
	Rwanda	DRC	1,243.9	2,082.2	838.3(67.4%)	▲
	Tanzania	Zambia	3,155	2,174	-981(-31.1%)	▼
Millet	Uganda	Kenya	4,901.6	3,654	-1247.6(-25.5%)	▼
	Tanzania	Kenya	95	50	-45(-47.4%)	▼
	Zambia	Tanzania	94	236	142(151%)	▲
Wheat	DRC	Rwanda	23.26	26.56	3.3(14.2%)	▲
	Kenya	Rwanda	2,149.7	1,970.5	-179.2(-8.3%)	▼
Rice	Tanzania	Rwanda	3,031.2	2,430.1	-601.1(-19.8%)	▼
	Tanzania	Uganda	1,835.1	11,517.2	9682(527%)	▲
	Rwanda	DRC	1384	1,760	376(27.2%)	▲
	Tanzania	Zambia	513	2,031	1518(295%)	▲
	Tanzania	Kenya	65	42	-23(-35.4%)	▼
	DRC	Uganda	24.63	54.79	30.16(122%)	▲
Red Sorg.	Uganda	Kenya	1731.4	1,536.36	-9195.04(-11.3%)	▼
	Uganda	Rwanda	3,796	2,900.6	-895.4(-23.6%)	▼
	Tanzania	Kenya	311	95	-216(-69.5%)	▼
G.Nuts	Uganda	Rwanda	1,085.2	926.3	158.9(-14.6%)	▲
	Rwanda	DRC	9.46	11.288	1.8(19.3%)	▲
	Tanzania	Uganda	2191	2191.8	0.8(0%)	▲
	Tanzania	Kenya	721	940	219(30.4%)	▲

2.0 Crop Season Update

Uganda: In the western Nile, there were favorable crop conditions with much of the area receiving above average rainfall in April and March. The March to May rains in the central and east-central region were above average. Similarly, the western region received well distributed and above average rainfall and the crop condition was reported favorable

Tanzania: Maize in the southern unimodal zone is at late maturity and early harvest phase. Compared to April, rainfall has subsidized seasonally heading into harvest. Good rainfall distribution has led to optimal conditions for bean crop in the bimodal zone with above average harvest expected in June however, early harvest began in May. According to April's food security report, exceptional conditions were observed in Shinyanga and Kagera regions with the crop in the south is at the final maturity stage. Above average harvest is anticipated with harvest peaking in June.

Kenya: Maize crop is at the vegetative stage in North Rift. According to Normalized Difference Vegetation Index (NDVI) and

Crop Conditions

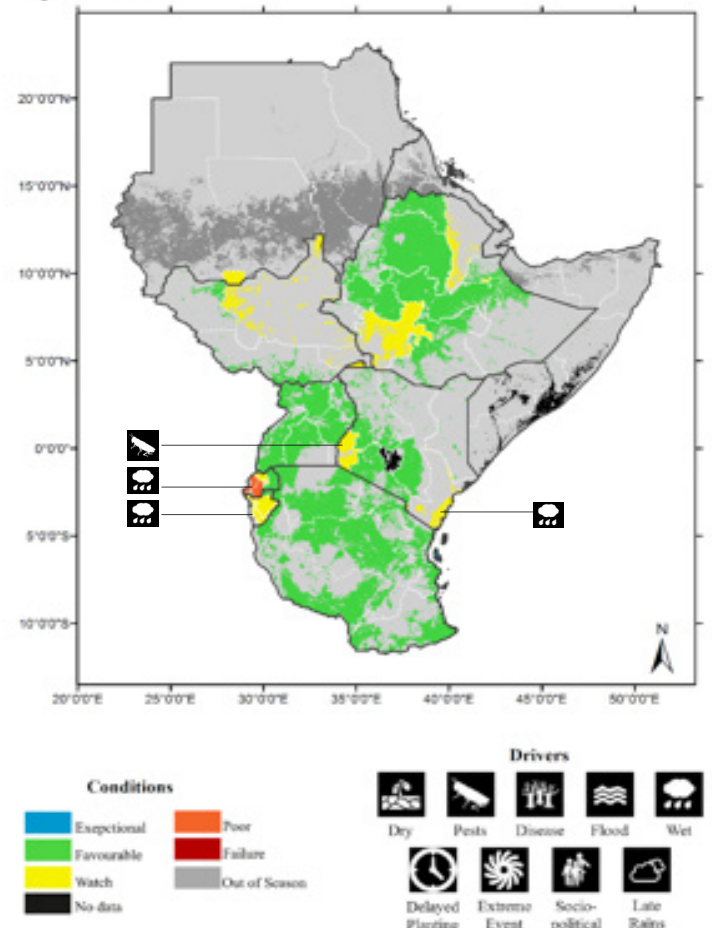


Figure 1: Crop conditions

Source: www.cropmon.org

field observation, much of the maize crop is doing well as adequate rains were recorded in April and May. According to USGS rainfall estimates (RFE), May received 122% more rainfall compared to the short-term average in the rift valley with a total of 131mm recorded. In western Kenya, fall armyworm was reported in parts of Siaya County therefore, the maize crop was under watch conditions. In Tana River County, heavy rains in the upper catchment of the Tana River led to flooding in the lowlands. Similarly, wet conditions were experienced in Taita Taveta County leading to extensive damage of the bean crop. Upper eastern areas around Mt. Kenya (Imenti and Buuri) experienced enhanced rainfall in April and May leading to damage of the bean crop, however, in the lower areas of Igembe, parts of Tigania, Embu and Tharaka Nithi, the crop was performing exceptionally with much of it at the pod formation stage.

Rwanda: The secondary season is primarily used for pulses production. This year's Season B commenced positively with adequate rains recorded in April. However, in May enhanced rainfall led to flooding in the eastern lowlands, Northern Province, and Western province. In May, United States Geological Survey (USGS) rainfall estimates (RFE) indicated that the eastern region received 81% (about 82mm) more rain compared to the short-term average (50mm). The crop is currently under watch conditions heading into harvest. Only the eastern part of the country had a favorable crop in May due to prevailing dry conditions. In the East, rice development was adversely affected by enhanced rains leading to longer wet conditions.

Burundi: In the central plateau, beans are at the maturity stage with RFE estimates indicating slightly above average rainfall performance compared to the short-term average. The crop was adversely affected by the wet conditions leading to rots; for in-

stance, Bubanza region in the north received 96% (about 288mm) higher compared to the short-term average of 108mm in April.

3.0 East African Grain Markets

3.1 Kenya

Overview

• Stocks of grain staples were reported to be adequate in the monitored markets with last season’s harvest and imports from Uganda and Tanzania shoring up supply.

Maize: Supply of maize was adequate in the monitored markets with the commodity trading on average at Kes 30/Kg and below the five-year average. In Nairobi, maize prices remained relatively stable compared to last month at Kes 33/Kg; field reports indicate Busia market as the primary source of the commodity, therefore; prices are expected to go down as stocks are on the rise in Uganda. In Nakuru, the May average price was Kes 25/Kg; prices were below the five-year average by 25% and expected to go down as farmers within the North rift are held up with last season stocks occasioned by poor market prices since the beginning of the year. Season crop performance in the north and south rift is exceptional therefore, harvest prospects are expected to be good later in the year. This means prices are anticipated to remain low in the in the fourth quarter. Presently, farmers in Uasin Gishu and Trans Nzoia Counties are lamenting the low prices on offer in the western markets; for instance, in aggregation markets such as Kamwosor, Kachibora and Kolongolo, maize is selling as low as Kes 21/kg and according to traders, the situation may worsen with the new harvest from neighboring countries. In Kisumu, prices decreased significantly by 10.8% with much of the maize coming from the North Rift as prices are anticipated to go down in June.

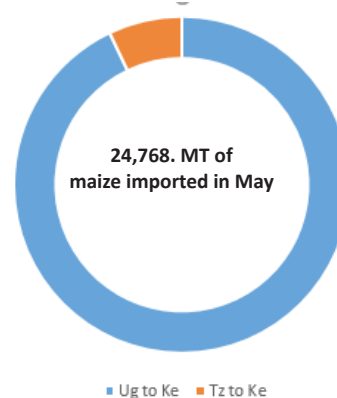
Beans: In May, supply improved in the Eastern and Central markets owing to the early harvest of pulses. Stocks are anticipated to increase in June as harvest intensifies in Upper, and Lower eastern. In Nairobi’s Nyamakima’s market, supply fluctu-

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

	Nairobi			Mombasa			Eldoret			Nakuru		
	May-Prices	change from Apr		May Prices	change from Apr		May-Prices	change from Apr		May Prices	change from Apr	
Maize	33	2(6.5%)	▲	28	0(0%)	■	29	0(0%)	■	24	0(0%)	■
Imp. rice				78	0(0%)	■	117	-12(-10.3%)	▼	82	-26(-24.1%)	▼
Red Beans	69	6(9.5%)	▲	60	0(0%)	■	78	-9(-3.7%)	▼	65	2(3.2%)	▲
Red Sorghum	50	3(6.4%)	▲	32	0(0%)	■	78	-3(-3.7%)	▼	41	0(0%)	■
Millet	63	-28(-30.8%)	▼	90	-1(-1.1%)	▼	100	-1(1.1%)	▼	79	4(5.3%)	▲
Green Grams	93	-19(-17%)	▼	70	9(14.8%)	▲	124	7(6%)	▲	104	5(5.1%)	▲

	Kisumu			Meru		Makueni			
	May Prices	change from Apr		Apr Prices	change from Mar.	Apr-Prices	change from Mar		
Maize	33	-4(-10.8%)	▼	22	1(4.8%)	▲	25	-4(-13.8%)	▼
Imp. rice	110	0(0%)	■						
Red Beans	70	0(0%)	■	72	2(2.9%)	▲	74	-6(15.9%)	▼
Red Sorghum	37	-3(-7.5%)	▼	38	0(0%)	■			
Millet	99	5(5.3%)	▲	72	1(1.4%)	▲			
Green Grams	82	-2(-2.4%)	▼	68	-4(-5.2%)	▼	87	-4(-4.4%)	▼

Figure 2: Imports of Maize

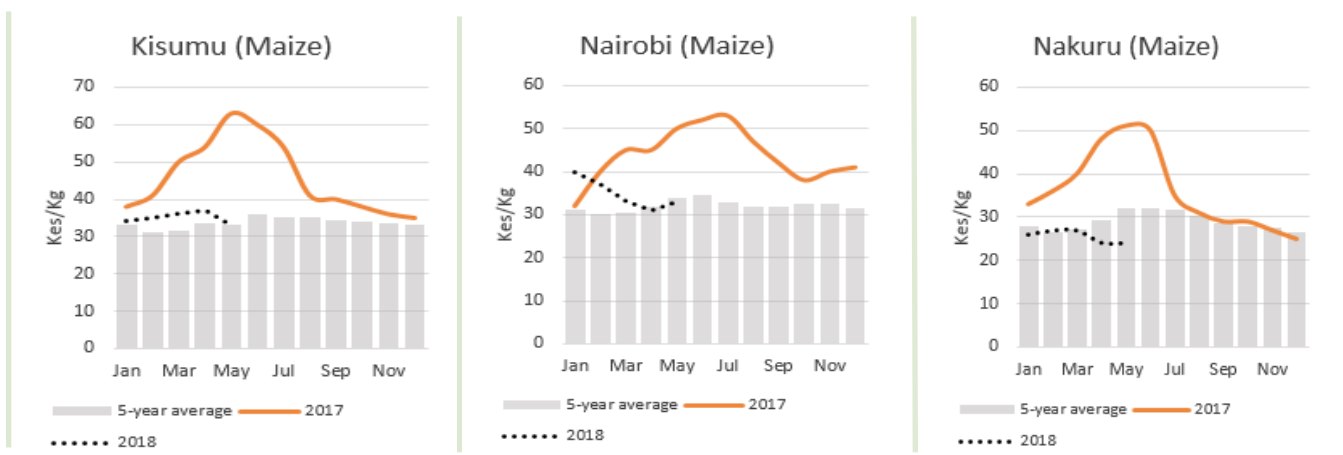


ated with a 9.5% gain recorded; the commodity was trading at Kes 69/kg on average and a downtrend is expected with inbound stocks from long season crop of eastern region. In Kisumu, about 100.2MT of beans was traded in May with yellow beans being the most preferred variety among the urban consumers; the price of red beans decreased by 7.5% as supply was reported to be adequate from the source market of Busia in Uganda. In Mombasa’s Kongowea market, all the bean varieties had stable prices save for Mwitmania (Sura Mbaya), this was as result curtailed access to Ethiopia markets, a key source of the commodity due to heavy rains in northern Kenya. Prices of the commodity are expected to go down in the monitored markets as Uganda, a key source market for the commodity will be harvesting in June.

Rice: There was an increase in traded volumes in Mombasa’s Kongowea market. A total of 47.5MT of imported rice (Pakistan) variety was transacted in May compared to last month’s 32.5MT indicative of strong demand for the variety. Traders attributed the surge in demand to tightened supply of the preferred local Pishori and aromatic varieties from Tanzania. In Kisumu, prices have been relatively stable since the first quarter with demand

for Pishori rice remaining high in the open markets. The demand for imported (Pakistan) rice has been very low with prices remaining stable at Kes 110/Kg with supply remaining somewhat lower compared to the previous months of 2018. Prices are expected to remain relatively stable in the coming month as supply from the global market is stable.


Figure 3: Wholesale price trends of Maize in selected markets in Kenya




2.2 Rwanda

Overview

- Maize prices have gained marginally in most of the monitored markets supply reported to be steady.
- Early harvest of rice has eased pressure on demand with imports from Tanzania decreasing seasonally.
- Sorghum, Maize and Rice prices are expected to decrease in June as harvest peaks.

 **Maize:** In Kigali's Mulindi market the commodity was trading at Rwf 161/kg and this was 48% lower than last year's high level and a 4%(Rwf 7/Kg) decline from previous month's average. Supply from Ngoma, Nyagatare, and Kayonza was reported to be steady and prices are expected to remain relatively in the coming month. In Ruhuha, traders reported adequate stocks with demand sustained by local institutions and local maize processing industries, prices increase marginally by 3.69% and a downtrend is expected in June as Season B harvest begins. The northern market of Ruhengeri experienced the highest price gain as stocks diminished seasonally; currently, the 2018b season is underway and prospects look favorable. Trade between Uganda and Rwanda was adversely affected by heavy rains as the road through Gatuna was damaged by landslides (See plate 1). This can be attributed to the 26%(748MT) decline in trade through Gatuna border which affected supplies in Byumba region and Kigali further south. In Rubavu market, harvest from the DRC has eased demand for the commodity as reports indicate that stocks have diminished seasonally. With 2018B harvest, prices are expected to decrease marginally in June as households will not be purchasing from the markets in the short run.

 **Beans:** Prices were on an upward trend in the month of May. In Kigali's Kimironko market, market offload was estimated at 360MT, a 14 % decrease from the previous month's volume with the supply of Red beans and yellow beans reported to be low, therefore, their prices were elevated compared to other varieties. In Musanze market the demand for Kiryumukwe, Kansirida, and mixed beans was reported to be higher, compared to other varieties with a marginal 2.4% increase recorded for red beans. In the Northern markets, supply from Burera, Gakenke, and Nyabihu could not meet demand therefore, traders imported from Uganda through the Cyanika border though stocks in Uganda have diminished seasonally as trade declined by 20% (647MT) compared to the previous month. Demand currently is sustained by schools that have just come out of recess. In Mulindi, the market offload was approximately 500MT for all the bean varieties as

supply remained steady however, traders reported lower demand compared to the previous month. Prices remained relatively stable with a marginal 2.9% gain recorded. Prices are expected to decrease in the coming month as 2018B harvest is expected to shore up supply in June.


 **Rice:** The second wet season for rice is underway with local production expected to shore up supply in the markets. However, production is expected to be average to below average. Generally, prices remained stable in all the monitored markets with volatility ranging from 0.27% to-3.2%. In the Eastern markets, there was a marginal gain of 0.2% as produce from the region expected to improve stocks. Produce from Bugarama valley and Kirehe will push prices lower in the coming month; local production has eased demand for Tanzanian rice as a 19%(601MT) decrease in trade was recorded in May. In the Kimironko market, Bugarama rice from Rusizi district fetched better prices compared to imported varieties however, consumers preferred Pakistani rice which is cheaper compared to other varieties. In Kamembe prices remained stable with heavy rains hampering access to the market.



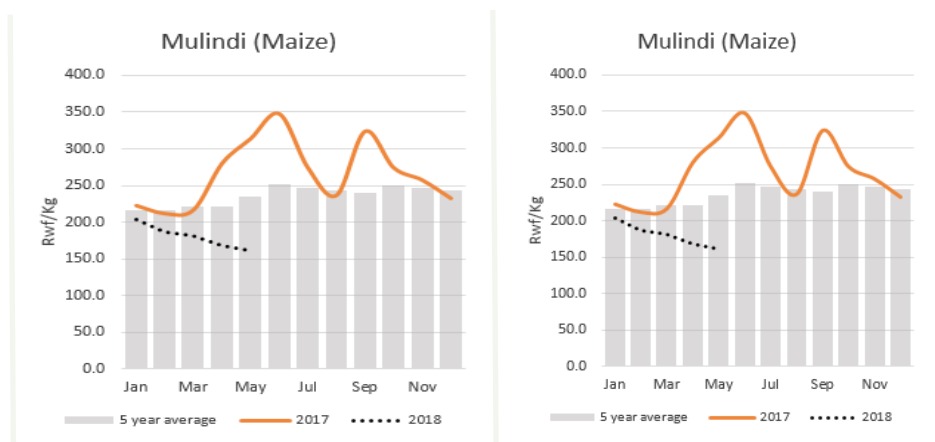
Plate1: Road connecting Rwanda and Uganda through Gatuna Border (20/5/2018).

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

	Ruhengeri			Ruhuha			Kamembe		Mulindi	
	May Prices	change from Apr.		May-Prices	change from Apr.		May Prices	change from Apr.	May Prices	change from Apr.
Maize	220	25(12.8%) ▲		225	8(3.69%) ▲		207	2(0.98%) ▲	161	-7(-4.17%) ▼
Rice (Kigoli)	826	28(-3.2%) ▼		731	3(0.27%) ▲		740	1(0.14%) ▲	780	0(0.0%) ▬
Red Beans	461	11(2.4%) ▲		348	21(6.42%) ▲		352	-5(-140%) ▼	425	12(2.91%) ▲
Red Sorghum	357	7(2.0%) ▲		371	8(2.20%) ▲				335	6(1.82%) ▲
Millet	708	3(0.43%) ▲							534	11(2.10%) ▲
Wheat	503	1(0.2%) ▲							539	15(2.86%) ▲

	Kimironko			Rubavu	
	May Prices	% change from Apr.		May Prices	% change from Apr.
Maize	257	8(3.21%) ▲		260	9(3.59%) ▲
Rice (Kigoli)	799	-4(-0.50%) ▼			
Red Beans	505	17(3.48%) ▲		483	22(4.77%) ▲
Red Sorghum	471	-27(-5.42%) ▼		342	-17(-4.74%) ▼
Millet	617	10(1.65%) ▲			
Wheat	518	19(3.81%) ▲		645	-14(-2.12%) ▼

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





3.3 Uganda

Overview

- Demand for maize eased in all markets as the country is heading into harvest season.
- Price of Sorghum, Millet, Beans are expected to go down in the coming with reports indicating good prospects from the Second/South season.

Maize: In May, maize was at maturity in the southern, central and eastern region with green maize already being consumed by rural households. Therefore, prices have declined in most of the monitored markets in anticipation of the new stocks. In Busia, prices were below the five-year average by 14% and 56% lower compared to last year's high levels. In Kampala, prices declined by 4.1% (Ugx 682/Kg in May) with supply expected to increase in June. In May, demand for maize by millers in Rwanda had slowed down due to reduced demand as schools were on recession last month; the price of Super 1 maize meal averaged Ugx 1200/Kg. In the easterly markets, demand was reported to be lower with a marginal decline of 3.9% recorded in Tororo as the commodity was trading at Ugx 663/Kg. In the north, the Gulu market had a marginal decline of 5% with supply reported to have improved since the beginning of the month. In Busia market, demand was sustained by Kenyan traders with an average daily offload of about 900MT recorded as prices averaged Ugx 728/Kg (Kes 20/Kg). Trade is expected to peak next month with inbound stocks from the second main season.

Beans: In May prices were relatively stable in easterly markets; in Tororo no price change was observed as mixed beans was trading at Ugx 1600/Kg with Busia recording a marginal gain of 5.6%. In Busia, traders from Kenya bought much of the commodity. In the North, Lira recorded the lowest price amongst the monitored markets with the commodity trading at Ugx 1563/Kg with about 3680MT traded in May. In the central region markets, harvested beans from the main season were registered from Kasese therefore old stocks of Nambale and yellow beans were offered at a relatively low price in Kampala markets. Though the supply of Nambale and yellow beans from Rwanda remained stable in May, the prices were higher compared to the local beans as they were deemed to be of better quality. Short Nambale bean was the most preferred and was selling at about Ugx.2050/kg at wholesale in Kampala. Demand from Kenyan traders increased by 15.9% (1,728MT) however, trade from Rwanda decreased by 36.9% (1,833.46MT in May) as stocks from season B shored up domestic supply. Prices of beans are expected to decrease as harvest season peaks in June.

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

	Kampala		Lira		Busia		Gulu	
	May-Prices	% change from Apr.	May Prices	% change from Apr.	May Prices	% change from Apr.	May Prices	% change from Apr.
Maize	682	-29(-4.1%) ▼	656	-8(-1.2%) ▼	728	-101(-12.0%) ▼	760	-40(-5%) ▼
Rice	3934	175(4.7%) ▲	3834	82(2.2%) ▲			3500	0(0%) ▬
Mixed Beans	1687	-243(-12%) ▲	1563	-103(-6.1%) ▼	1718	91(5.6%) ▲		
Red Sorghum	838	-40(-4.6%) ▼	691	16(2.4%) ▲	758	-5(-0.7%) ▼	665	-135(-16.9%) ▼
Millet	1815	-95(-5.0%) ▼	1651	-25(-1.5%) ▼	1610	-111(-64%) ▼	1695	-5(-0.3%) ▼
Soya Beans	1858	130(7.5%) ▲	1760	13(6.9%) ▲	1891	81(4.5%) ▲	1700	230(15.6%) ▲

	Tororo		Kasese		Masindi	
	May Prices	% change from Apr.	May Prices	% change from Apr.	May Prices	% change from Apr.
Maize	663	-27(-3.9%) ▼	616	39(6.8%) ▲	701	1(0.1%) ▲
Rice	3240	253(8.5%) ▲	3756	340(10.0%) ▲	3901	47(1.4%) ▲
Mixed Beans	1600	0(0.0%) ▬	2271	63(2.9%) ▲	2128	-227(-9.6%) ▼
Red Sorghum	712	23(3.3%) ▲	1177	154(15.1%) ▲	1100	20(1.9%) ▲
Millet	1725	45(2.7%) ▲	2452	-514(-17.3%) ▼	2801	306(12.3%) ▲
Soya Beans	1830	157(9.4%) ▲	1856	2(0.1%) ▲		

Figure 5: Wholesale price trends of Maize in selected markets in Uganda

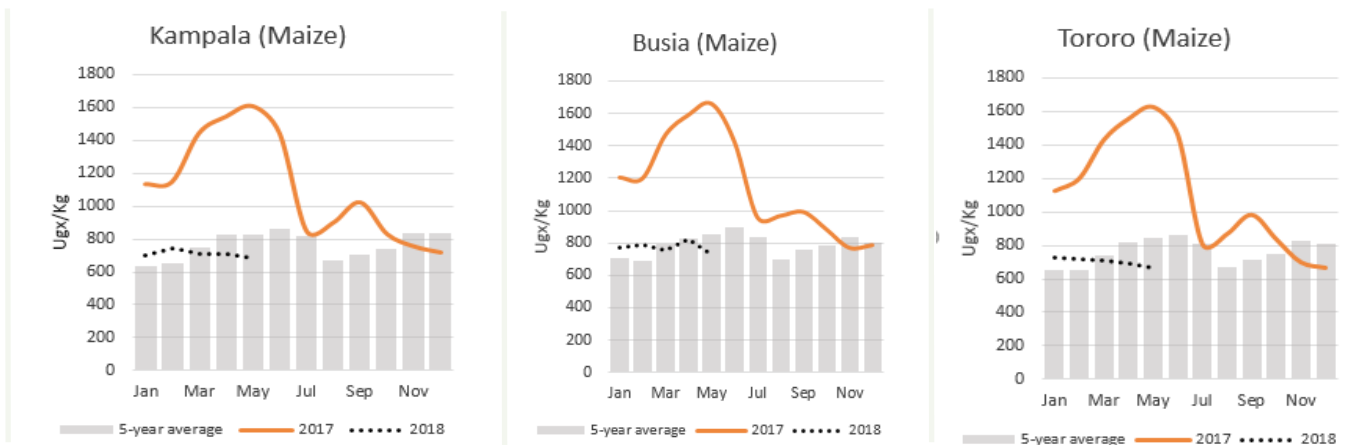
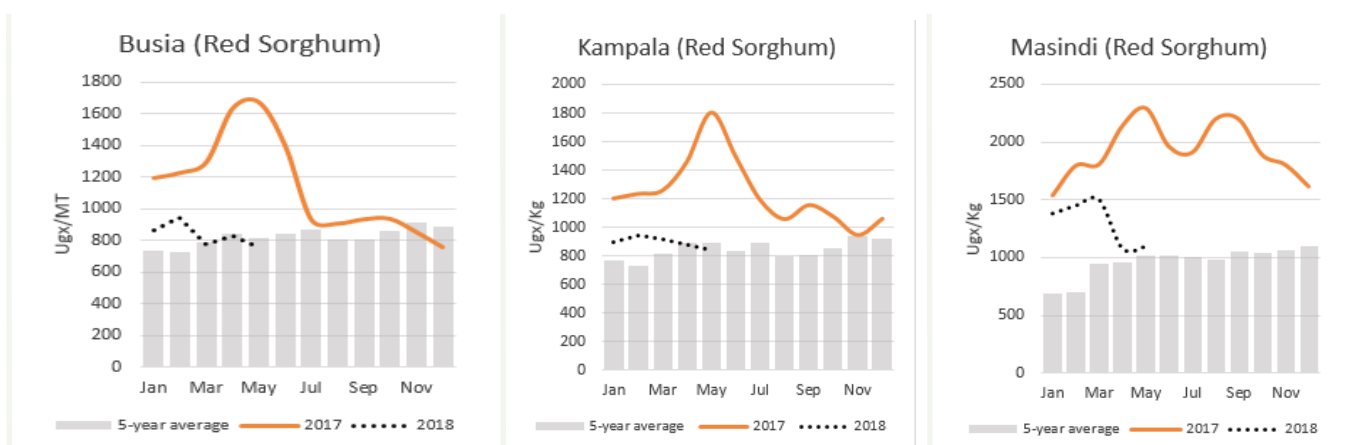



Figure 6: Wholesale price trends of Sorghum in selected markets in Uganda




3.4 Tanzania

Overview

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

 **Maize:** Maize prices remained relatively stable with minimal prices volatility (-3% to 3.6%) observed from the monitored markets. In May, the prices were highest at Dar es Salaam’s Tandale market at Tzs 588/Kg with Mbeya market recording the lowest price at Tzs 300/Kg. In the South, prices have gone down significantly as the region is currently harvesting the Msimu season crop. A look at Iringa and Mbeya markets shows stable prices with a marginal decline observed in Iringa as prices are 56% lower compared to the five-year average and 73% lower than last year’s high levels. In Dar es Salaam, there was a marginal decline of 2% (Tzs 12/Kg) with a 51% decrease from the five-year average. Reports indicate supply from the Southern region was adequate, therefore, prices are expected to go down in the coming month. In Arusha, there was a slight 3.6%(Tzs 18/Kg) increase from the previous month’s average with a decrease in prices expected in the coming weeks with inbounding stocks from Singida and Manya. In Dodoma’s Kibaigwa market, the prices declined with field reports indicating that traders are offloading old stocks at lower prices heading into the harvest season. In Mbeya, the commodity was trading at Tzs 300/Kg with traders aggregating the commodity

from Mlowo, Chimbuya, Igowe, Momba, Inyala, Ambassador and Sumbawanga in the South. Prices in Tanzania are expected to ease following the ongoing harvest.

 **Beans:** Prices declined seasonally in all the monitored markets. Mbeya offered the lowest price for yellow beans at Tzs 1,455/Kg and this represented a marginal decline of 0.2%. With harvest ongoing in the south, prices are expected to go down in the region; a look at Iringa market indicates at 2.4% decrease in prices. With traders from Dar es Salaam sourcing the commodity from Iring and Mbeya, prices were higher compared to the source markets. In May, a 4.3% decrease was recorded in Dar es Salaam’s Tandale market with the trend expected to persist in June. However, it is worth noting that unlike last year, production may be lower owing to the extended wet conditions in March and April occasioned by heavy rains experienced in the region, therefore, the crop performance was adversely affected. Therefore, cross-border trade is expected to decline earlier than usual this year with prices increasing earlier than October going by the long-term trends.


 **Rice:** In May, prices declined in all the monitored markets. Mbeya market had the highest plunge at 16.7% (Tzs 359/Kg) with supply from Rukwa basin, Kyela and Usangu easing the pressure on demand. With harvest expected to intensify in June, prices are expected to go down. In the Northern markets prices decreased by 7.6%(Tzs151/Kg) in Arusha with traders reporting adequate stock coming from the Southern region. In Iringa market, prices went down marginally by 2.05%(Tzs42/Kg) and this was 1.7% higher than last year’s prices; prices are expected to go down seasonally in the coming month.

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

	Dar es Salaam			Iringa		Mbeya		Arusha		Dodoma	
	May-Prices	change from Apr.		May Prices	change from Apr.	May Prices	change from Apr.	May Prices	change from Apr.	May Prices	change from Apr.
Maize	588	-12(-2.0%) ▼		320	-10(-3.03%) ▼	300	(0%) ▬	518	18(3.6%) ▲	378	-8(-2.1%) ▼
Mbeya Rice	2197	-131(-5.6%) ▼		2005	-42(-2.05%) ▼	1794	-359(-16.7%) ▼	1849	-151(-7.6%) ▼		
Soya Beans	1996	-4(-0.2%) ▼		1681	1(0.06%) ▲	1723	160(10.3%) ▲	2115	115(5.8%) ▲		
Red Sorghum	758	-42(-5.3%) ▼				600	-44(-6.8%) ▼	1493	57(4.0%) ▲	360	21(6.2%) ▲
Yellow Beans	2064	-90(-4.3%) ▼		1800	-43(-2.38%) ▼	1455	3(0.21%) ▲	1647	-92(-5.4%) ▼		
Pigeon Peas	785	-15(-1.9%) ▼		1369	-56(-3.93%) ▼			489	-11(-2.2%) ▼	370	32(9.5%) ▲
Wheat	1245	7(0.6%) ▲		1271	-104(7.56%) ▼	980	35(3.7%) ▲	1206	6(0.5%) ▲		

Figure 7: Wholesale price trends of Maize in selected markets in Tanzania

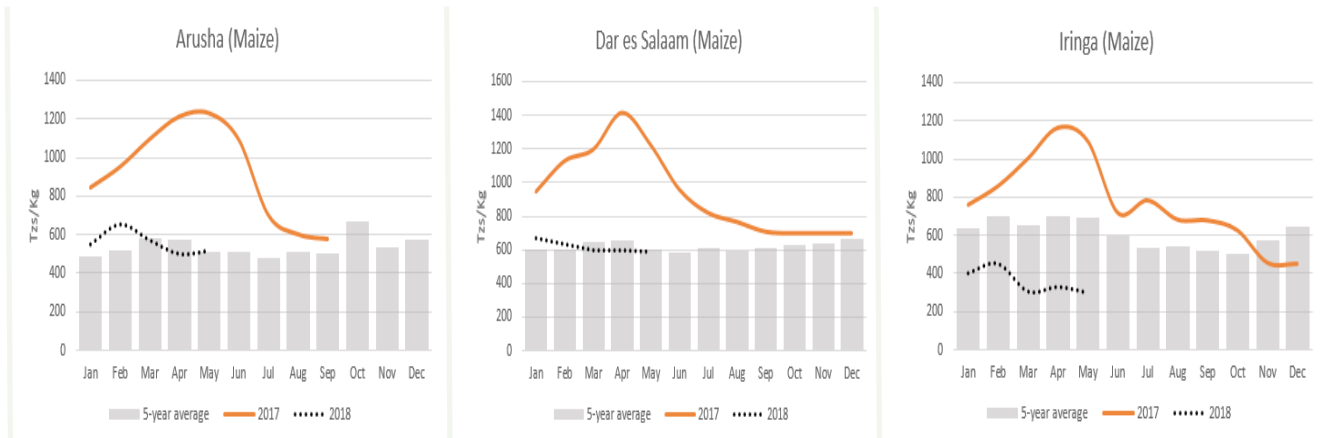
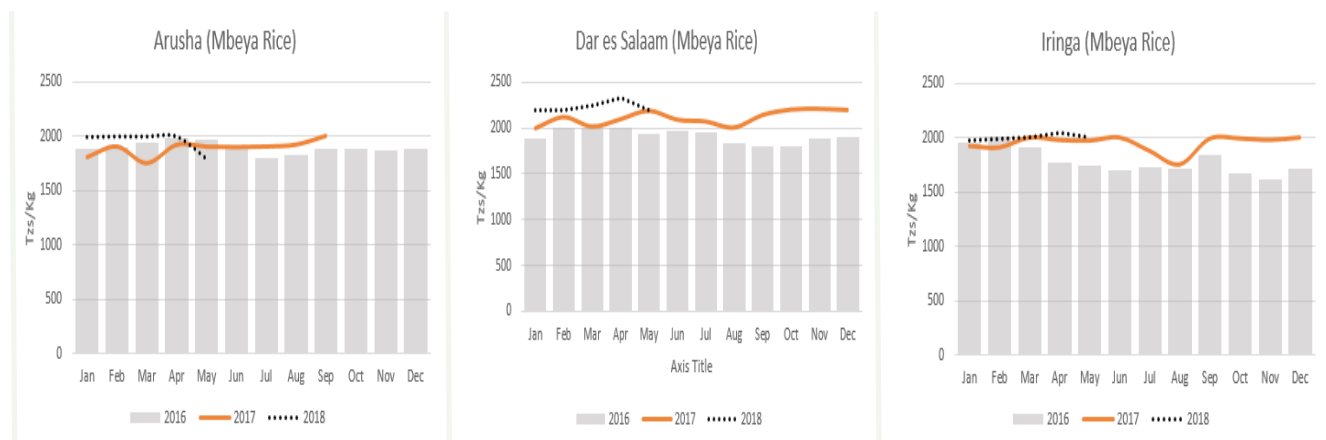


Figure 8: Wholesale price trends of Mbeya Rice in selected markets in Tanzania



3.5 Burundi

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.

Maize: prices decreased significantly by 26.7%(Bif/189Kg) in Ngozi with field reports indicating that consumer demand was weak. The decrease was reinforced by more than enough stocks realized from last season's above average performance. Prices were above the five-year average by 14% however, were 42% lower than last year's high levels. In Gitega, prices were relatively stable with a marginal gain of 4.9%(Bif 22/Kg) with traders reporting a decrease in the supply of the commodity to the market. Currently, traders are importing the commodity from southern Tanzania and Zambia as the country is heading to the end of the lean season. In Bujumbura market, prices remained relatively stable in May and are expected to go down in the coming month as the country is heading into the harvest season in June.

Beans: Bujumbura market had a significant price gain of 22%(Bif 269/Kg) indicative of tightened supply of the commodity. In Gitega market, prices decreased with early harvest stocks from neighboring communes being traded in the markets. Prices are expected to go down in the coming month as harvest peaks. In Ngozi market, prices increased by 7.4%(Bif 97/Kg) with supply from Kirundo and Muyinga was reported to be low. Generally, prices are expected to go down heading into the harvest season.

Rice: Prices in May declined in the monitored markets. In Gitega market, the price of rice declined marginally by 3% (Bif 53/ Kg) with reports showing adequate stocks from Imbo plain and Kumoso region as it was the harvest season (May-June). In Ngozi, there was relative stability as a marginal 4.7%(Bif 89/Kg) decrease was recorded with stocks reported to be adequate. Prices are expected to go down in the coming month as domestic stocks improve coupled with increased production from Tanzania, a key source of the commodity.

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

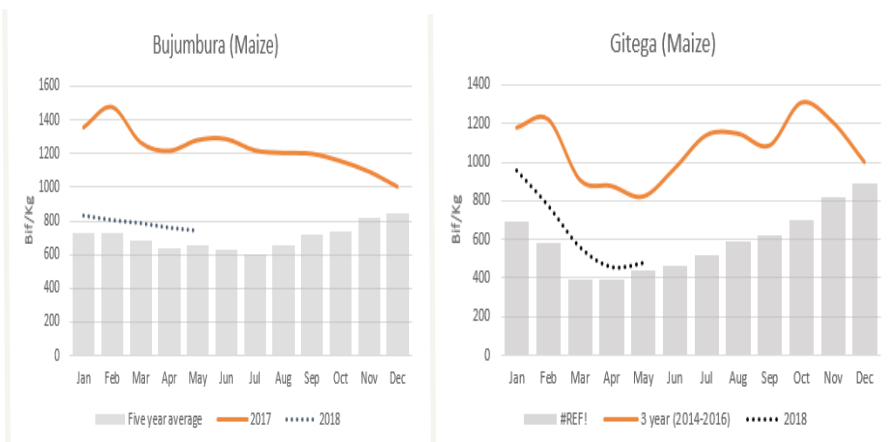


Table 7: Wholesale Prices of Grains in selected markets in Burundi (Bif/Kg)

	Ngozi		Gitega		Bujumbura	
	May-Prices	% change from Apr.	May Prices	% change from Apr.	May Prices	% change from Apr.
Maize	518	-189(-26.7%) ▼	476	22(4.9%) ▲	745	-11(-1.5%) ▼
Rice	1806	-89(-4.7%) ▼	1711	-53(-3.0%) ▼	1472	-93(-6.0%) ▼
Red Sorghum	634	-90(-12.4%) ▼	858	-47(-5.2%) ▼	961	-13(-1.3%) ▼
Wheat	1574	36(2.34%) ▲	1541	-34(-2.2%) ▼	1516	13(1.0%) ▲
Yellow Beans	1411	97(7.4%) ▲	1606	-261(-19.4%) ▼	1492	269(22.0%) ▲
Soya Beans	1166	76(7.0%) ▲	1301	82(6.7%) ▲	1650	44(2.7%) ▲

