EAGC EASTERN AFRICA GRAIN COUNCIL Grain Watch Quarterly RATIN

EASTERN AFRICA GRAIN MARKETS AND TRADE | APRIL – JUNE 2022 | JULY 2022

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HIGHLIGHTS

EASTERN AFRICA: Food insecurity continues to persist across the Eastern Africa region driven by multiple shocks including rising food prices, the knock-on effects of conflicts, insecurity, displacement, migration, and destitution following loss of livelihood assets. The Russia-Ukraine conflict has driven up already high global agricultural commodity prices. The grain prices have also reached all-time highs both in the global and domestic markets, casting a serious shadow on 2022 cereal harvests and food insecurity in the Eastern Africa Region, due to these combined effects of macroeconomic challenges and drought. Fertilizer prices have also more than doubled from their levels a year ago due to the Russia-Ukraine conflict, rising energy prices and supply chain disruptions following the Covid-19 pandemic. There has also been a hike in fuel prices region-wide, rising by 17-75% in April 2022 year-on-year with the steepest increases observed in Burundi, Somalia, Kenya, Ethiopia, and South Sudan. This has impacted farmers' ability to use farm machinery and transport and will further reduce their ability to grow sufficient crops this year.

While headline inflation increased during this Quarter in most of the countries of Eastern Africa, the food inflation increased even more rapidly while the currencies within the region became weaker resulting to decrease in economic growth. While maize has been seen to be the most traded grain during the quarter, cross border food trade has generally decreased greatly within the region because of high prices of commodities, transportation and high import and export levies.

Grain prices of most staple food commodities have increased in the main producing countries such as Tanzania and Uganda due to high local and regional demand.

1. EASTERN AFRICA CROP SEASON

In both Ethiopia and Kenya, the maize crop is in the vegetative to reproductive stage following planting during the Belg (short rains) and long rains seasons in Ethiopia and Kenya respectively. However, there is high concern due to delayed rainfall onset and a possible fourth consecutive poor rainy season. This is impacting planting activities throughout Kenya, Somalia, and northeastern Uganda. Much of the sub region has experienced delayed rainfall onset for the March to May (MAM) rains, particularly in the Belg producing regions of Ethiopia, southeast, northeast, and coastal Kenya, and Somalia. As April or early May is usually the peak time for the March to May season in most parts of the sub region, below-average rainfall performance in April could result in little to no recovery of planted crops. Farmers in Somalia are also facing difficulties accessing agricultural inputs and labour as the extreme water shortage has resulted in high displacement levels, while the ongoing conflict in northern parts of Ethiopia also dampens production prospects.

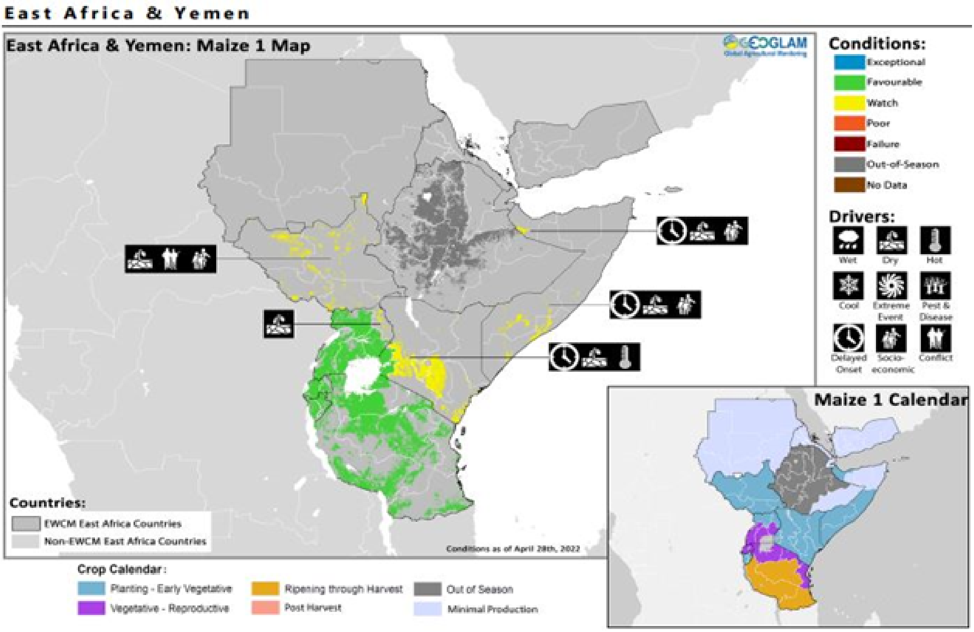

Fig 1: Crop condition map synthesizing Maize 1 crop conditions as of April 28th. Crop conditions over the main growing areas are based on a combination of inputs including remotely sensed data, ground observations, field reports, national, and regional experts. Conditions that are other than favorable are labeled on the map with their driver. Source ICPAC

According to IGAD Climate Predictions & Applications Centre, prospects of a fourth consecutive below-average rainfall season would place parts of Ethiopia, Kenya, and Somalia into the worst drought conditions experienced in the last 40 years.

2. WEATHER CONDITIONS AND OUTLOOK

According to ICPAC in the months of March to May weather across the Horn of Africa has been mostly dry, with mild to moderate rainfall deficits appearing across areas where the rainy season should have started, including southern and western Kenya, and central and southwestern Ethiopia.

Nonetheless, above-average rains particularly in western parts of Kenya will greatly improve the state of crop conditions that are in different growth stages. The conditions also favour a reduction in the African Army Worm and the Fall Army Worm (FAW) pests in western parts of the country. Further, most of the Western parts of Kenya will be harvesting during the third quarter of the year and therefore it is anticipated that there could be a slight decrease in the price of maize

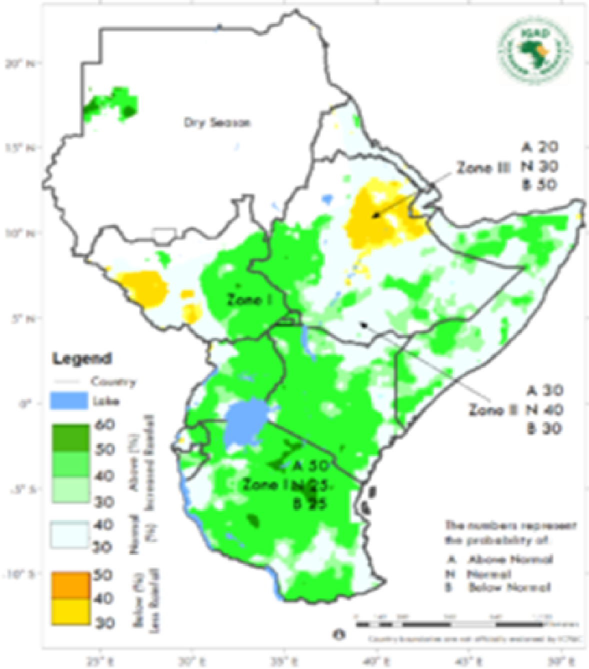

Fig 2: Rainfall anomaly for March-May 2022. Source: ICPAC

In the regions worst hit by drought, the current trends are comparable to those observed during the 2010-2011 famine and 2016-2017 drought emergency. In this respect, the Food Security and Nutrition Working Group, co-chaired by IGAD and FAO, estimates that 12 to 14 million people are currently highly food insecure in Ethiopia, Kenya, and Somalia.

Rainfall across most of the region has not yet been sufficient for planting or for the germination of dry-planted crops. Three consecutive failed rains or droughts and flooding in parts of the Eastern African region have hampered agricultural production activities leading to low agriculture output and high commodity prices. This has delayed planting activities in Belg (shorter season from February to April) receiving areas of Ethiopia, located in central and eastern areas of the country. Furthermore, in west Oromia, Southern Nations Nationalities and Peoples Regions and parts of Amhara that received below-average rainfall, extremely warm land surface temperatures, as well as low soil moisture may result in insufficient moisture in the soil, evapotranspiration and severe moisture stress. Above-average rains particularly in western parts of Kenya will greatly improve the state of crop conditions that are in different growth stages. Arid and Semi-Arid Lands of Kenya (common with the production of cow peas and green grams), and Somalia continue to face extreme drought conditions, following four seasons of below-average rains, a climatic event not seen in at least the last 40 years. Early forecasts for the October to December season also indicate prospects for another below-average season with an indication of rain deficit.

In the coming months of June to September, wetter than normal conditions are expected over central, northern south-western and eastern Ethiopia, western and parts of coastal Kenya, Lake Victoria Basin in Kenya, parts of the Karamoja cluster, central and south-eastern Uganda, a few places in South Sudan and Sudan, and northern parts of Somalia. (Figure 3)

Rainfall Forecast June - September 2022

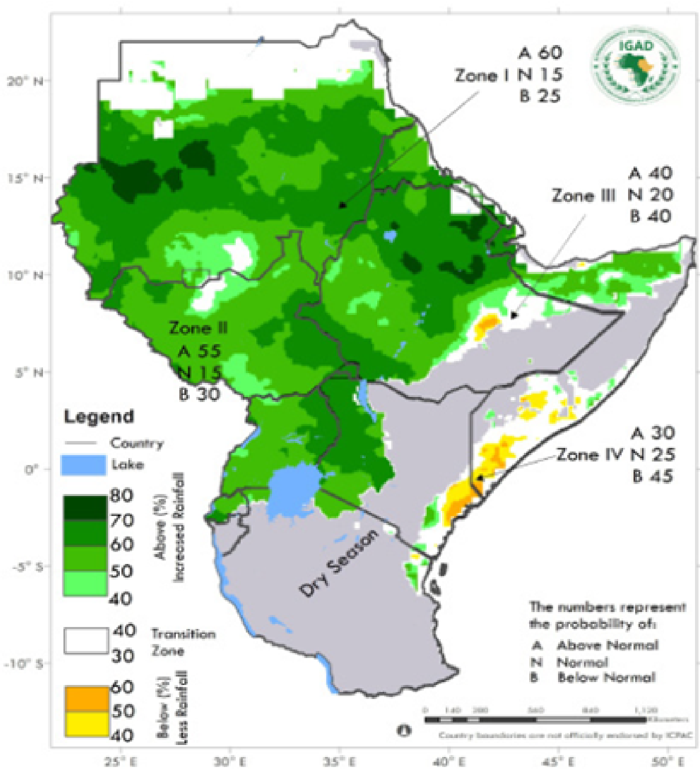

Fig 2: Rainfall forcast June - September 2022. Source: ICPAC

In Tanzania, most crops are at between 80 - 90% in terms of seasonal progress and are due for harvests from late June due to the dry season forecast (Figure 3). The anticipated good harvests will likely lead to relatively lower market prices for agricultural commodities. Further, dry conditions are ideal for feeder roads to facilitate agricultural marketing and distribution.

The likelihood of enhanced rains in Uganda is expected to improve crop conditions that are in different growth stages. However, the conditions might also favor high prevalence of some pests and diseases, an increase in weeds, waterlogging at flood-prone farms and post-harvest losses.

In South Sudan, June to September is a major cropping season. Enhanced rains present good prospects for crop production. However, post-harvest losses might be experienced particularly for the ongoing MAM crops that are due for harvest in this season.

3. CROSS BORDER TRADE DEVELOPMENTS

According to traders, maize was the most traded commodity within the East Africa region in April to June.Traders pointed out that trade from Uganda to Kenya has decreased due to the low production in the former and the high cost of transport caused by high fuel prices. However, the main commodities that were traded between the two countries were maize, beans, soyabeans and green grams. There have also been reported challenges with import permits, inspections at the border, relatively high aflatoxin and contaminants. Despite these challenges, there is high expectation for improvement in trade prospects on the back on an anticipated good harvest in Uganda.

Maize and rice accounted for between 60% and 70% of commodity trade between Tanzania and Kenya depending on the border crossing. Nonetheless, trade volumes have reportedly decreased due to changes in COVID-19 regulations in cross-border trade, lower exportable supplies from Tanzania (and thus higher prices) and recent stricter enforcement of export licensing and export permit regulations at the borders by the Government of Tanzania.

Rice importers in Uganda decried a decision by the Government that effectively (re)imposed 18% value added tax on rice imports originating from Tanzania. Nonetheless, the traders are optimistic that the trade volumes will increase in the second half of the year on the back of prospects of good rice harvests in Tanzania.

Unlike the other country pairs (Uganda and Tanzania), there was a reported increase in trade between Kenya and South Sudan driven by an increase in soybean trade from South Sudan to Kenya. This is because there have been ample stocks of the commodity in South Sudan and a favorable market in Kenya. Nonetheless, there is concern that trade may be curtailed by increasing shipping costs, unfavorable global economy and diminishing purchasing power of value chain players and consumers.

4. GRAIN MARKETS DEVELOPMENTS

During the second quarter, grain prices have generally increased seasonably mainly because of high local and regional demand and low supply in the main producing countries.

(a) Maize

In Kenya, there has been a sharp increase in the price of maize from the beginning of the quarter, rising 74% from USD 298/MT in April to USD 519/MT by end of June. The price is attributed to maize scarcity and various policy developments during the quarter

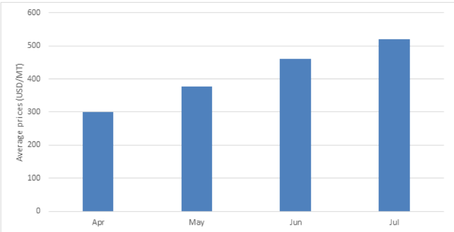

Fig 4: Q2 Kenya Maize Wholesale Prices. Source: EAGC RATIN

In Tanzania, Maize prices have increased consistently throughout the quarter, rising by 48% during this period from an average of USD 255/MT in April to USD 303/MT in June. The biggest price gains were recorded in May and June due to, among others, high demand from Kenya and high transport costs.

However, noting that most crops are approaching maturity and the early harvest has started in parts of the grain basket of the country, it is anticipated that a good harvest will likely lead to lower market prices. Further, dry conditions are ideal for feeder roads to facilitate agricultural marketing and distribution.

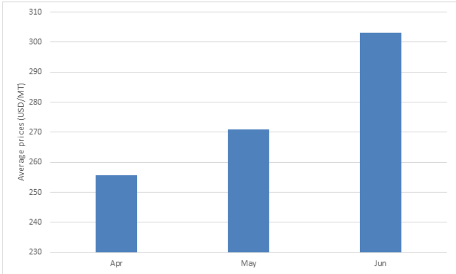

Fig 5: Tanzania Maize Wholesale Price Movement. Source: EAGC RATIN

In Uganda, the average price of maize increased by 14% (from USD 324 to 362 per MT), making it the most stable market compared to Kenya and Tanzania. Given expectations for below-average first season production in June/July, reduced global supply of grains, and sustained high global prices, staple food prices in Uganda are unlikely to decline as much as is typical during the post-harvest period and will remain above average

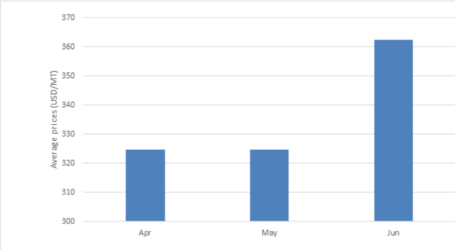

Fig 6: Uganda Maize grain Average of Wholesale.

EAGC with support from AGRA has been able to facilitate trade amongst its stakeholders. Maize linkages from Zambia Tanzania and Uganda to Kenya have been done during the last quarter with up to 50,000MT of maize identified for trade to the Kenyan off takers. Further, with Zambian exporters offering relatively large volumes beyond the ability of some individual SME off-takers, particularly in Kenya, EAGC is currently helping these SMEs to consolidate their requirements for onward trade facilitation from Zambian exporters.

(b) Red beans

In Kenya, the price of red beans has been steady at a price of USD 765 per MT.

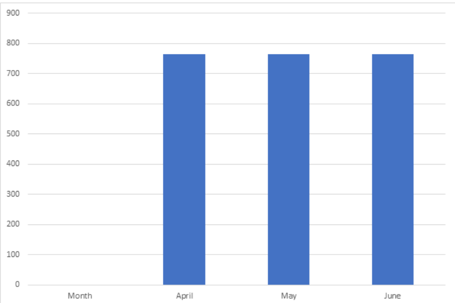

Fig 7: Q2 Kenya Red Beans Wholesale Price Movement. Source: EAGC RATIN

However, prices in Tanzania increased from USD 731/MT April to USD 751/MT in June. This is attributable to high demand and prices in Kenya.

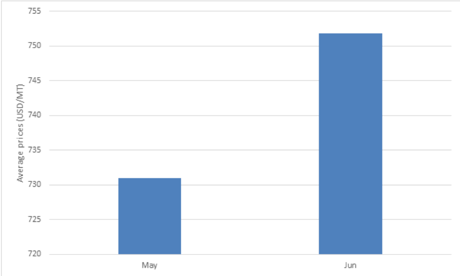

Fig 8: Q2 Tanzania Red Beans Wholesale Price Movement. Source: EAGC RATIN

(c) Sorghum

In Kenya, the price of Sorghum was consistent in the second quarter with no volatility observed.

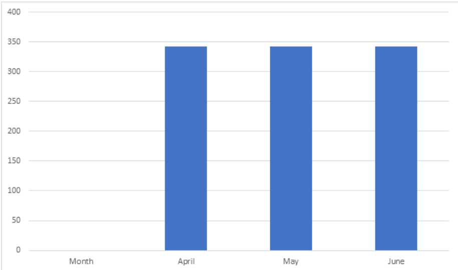

Fig 9: Q2 Kenya Sorghum Wholesale Price Movement. Source: EAGC RATIN

In Tanzania, Sorghum price increased by about 4% from USD 361/MT in April to 376/MT in June.

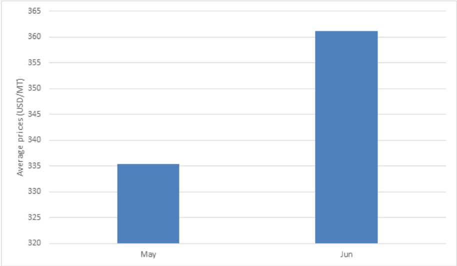

Fig 10: Q2 Tanzania Sorghum Wholesale Price Movement. Source: EAGC RATIN Analytics

In Uganda, the price of Sorghum decreased in the second quarter. The price decreased by 4% from the beginning of the quarter.

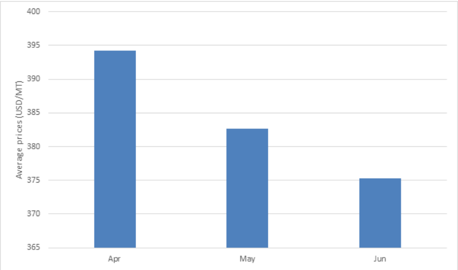

Fig 11: Q2 Uganda Sorghum Wholesale Price Movement. Source: EAGC RATIN

The price disparity between Uganda and Kenya has created useful trade opportunities. EAGC with support from TradeMark East Africa has successfully facilitated through the GSoko platform several transactions of red sorghum from Uganda to Kenya. More volumes of sorghum are expected to be facilitated by EAGC in the third quarter of the year.

(d) Rice

The price of rice in Uganda has been increasing from the start of the quarter. There is a 12% increase from April to June from USD 936/MT to USD 1,050/MT.

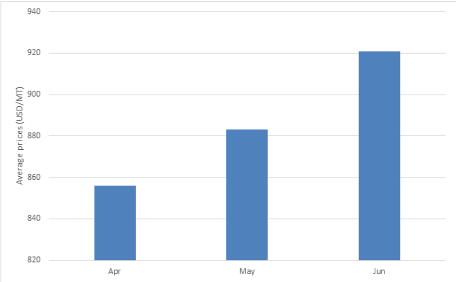

Fig 12: Uganda Rice Imported Average of Wholesale. Source: EAGC RATIN

Rice prices have also been increasing in Tanzania due to dwindling stocks during the lean period.

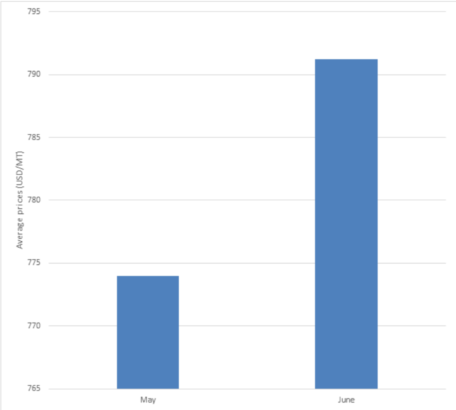

Fig 13: Tanzania Rice Wholesale Price Movement. Source: EAGC RATIN

5. REGIONAL AGRICULTURAL TRADE POLICY DEVELOPMENTS

(a) East Africa

The East Africa Community publishes the new Common External Tariff Schedule with a new 35% tariff band

The East African Community will be implementing a new Common External Tariff structure with effect from 1st July 2022. The CET regime is a trade instrument under the EAC Customs Union Protocol that dictates the import duty to be charged on goods originating from outside the East African Community. Unlike its previous iterations which have provided for a 3-band tariff structure (0%, 10% and 25% for raw materials, intermediate goods and finished goods, respectively), the new CET structure introduces a 4th tariff band of 35% import duty to provide additional protection for sectors and goods for which the Community is deemed to have sufficient capacity. Some of the goods covered by the new 35% band include dairy and meat products, cereals, cotton and textiles, iron and steel, edible oils, and beverages and spirits.

The new CET structure retains a Sensitive Items list which affords even higher import duty rates for some key grain commodities. For instance, maize and rice imports from outside the EAC attract 50% and 75% import duty respectively. However, wheat and pulses, which have previously been on the sensitive item list with 35% import duty, have now been moved to the new 4th tariff band.

(b) Malawi

The Government contemplates the Crops Bill, 2022 to bring order to the agricultural sector

The Government of Malawi is contemplating enacting the Crops Bill, 2022. The Bill, which has been proposed by the Ministry of Agriculture, intends to improve the governance and development of the agricultural sector, focusing on a few selected (scheduled) cash and food crops including grain commodities as maize, rice, soybeans, wheat, beans, groundnuts, sunflower, barley, sesame and pigeon peas. The Bill proposes to repeal the Special Crops Act and the Agriculture (General Purposes) Act and establish the Malawi Crops Regulatory Authority as a state corporation that will oversee all aspects of regulating these commodity value chains. If enacted, the Bill could significantly alter the agricultural landscape in Malawi. EAGC is thus working with grain sector stakeholders in the country to engage the government to ensure the Bill provides for the most appropriate regulatory and developmental functions that can move forward the grain sector in Malawi, without compromising the stated objective of the Bill.

(c) Kenya

i. Govt. waives importation of 540,000MT of maize

Unprecedented high cost of key food commodities has prompted the Government of Kenya to relax tariff-based restrictions on imports of these commodities originating from outside the EAC and COMESA regions.

Gazette Notice No. 5544 of 9th May 2022 removed import duty on 540,000MT of white non-GMO maize to be imported by 6th August 2022 to avert shortage. It targets imports from outside the East African Community. Imports would be restricted to what is needed by those who would be licensed to avoid shipping in excessive stocks by unscrupulous traders. Maize millers have snubbed maize imports on the back of high landing costs and a shorter window provided for shipping the commodity. Processors argue that currently, they can only get good stocks of non-Genetically Modified Organism (non-GMO) maize from Mexico, which will take at least 45 days for the first consignment to arrive after orders have been placed. However, some millers were unable to ship in the grain due to the high global cost of the commodity occasioned by the ongoing war between Russia and Ukraine.

ii. Government issues Gazette Notices removing import duty on inputs for animal feed and maize grain for food consumption

Gazette Notice No. 6615 of 24th May 2022 removed import duty on several raw materials for exclusively animal feeds industry, these being yellow maize (341,950MT), soybean meal (178,300MT), soybeans (86,250), cotton seed cake (28,000MT), sunflower seed cake (127,800MT), white sorghum (47,000MT), fish meal (46,750MT), dried distillers grains with soluble (DDGS, 68,250MT) and rapeseed cake. This means that imports would be allowed to have traces of genetically modified organisms (GMO). This Gazette notice provides some level of tolerance for GM-commodities (0.1% limit) and for the first time allows duty-free imports of DDGS for animal feeds.

While the Gazette Notices attempt to offer welcome respite to food and feed millers – and ultimately consumers – they are unlikely to have much impact due to several technicalities. For instance, the import period provided by Gazette Notice 5544 is too short to accommodate 540,000MT of maize from non-EAC/COMESA countries. Simply put, 3 months is too little for importers to secure foreign currency to finance the imports, confirmation of orders and bulking in the export country, and transit time to the Port of Mombasa, especially with the current global challenges in international shipping. The second Gazette Notice (No. 6615) is also hamstrung by time constraints as well as unfeasible GM-related restrictions on DDGS and reference standards.

EAGC is working closely with AKEFEMA, UGMA and CMA to engage governments to address the shortcomings of the 2 Gazette Notices and will keep its Members and Stakeholders informed on the developments.

iii. Govt. waives levies on maize imports

The government has waived all levies on maize imports effective July 1st, 2022, on all maize imported into the country from Tanzania and other COMESA countries, for the next 3 months before the next harvest. The move aims to reduce the cost of a 2kg packet of flour which has surpassed the Ksh. 200 mark. However, millers have termed he move which will only cut the cost by Sh2.7 for a 2kg packet as insignificant. The move will help fast track the clearance of trucks ferrying maize into the country at the borders which recently experienced a snarl up especially at the Namanga border point. Some of the costs that have been waived include KEBS levy, Kenya Plant Health Inspectorate Service (KEPHIS) levy, AFA levy, Port Health Service levy, KRA levy, Railway Development levy, and Importation Declaration Fund levy

iv. Millers exempted from duty on imported raw materials for manufacture of animal and chicken feed

Thirty millers were exempted from duty on imported raw materials used in the manufacture of animal and chicken feed. A gazette notice dated June 10 noted that all the imports shall be used for the manufacture of animal and chicken feed only and shall have been imported on or before October 31, 2022.

(d) Uganda

Government reimposes 18% VAT on rice imports from Tanzania

Rice traders from both Uganda and Tanzania have decried a government decision to impose 18% VAT on rice imports into Uganda originating from Tanzania. The domestic tax was imposed in May 2022 resulting in significant decline in rice imports and a corresponding spike in rice prices in Uganda with media reports indicating that the price of rice in Kampaala increased from to Ugx 4,000 from Ugx 3,500 .

https://observer.ug/news/headlines/73583-kampala-in-rice-shortage-as-traders-strike-over-18-vat

(e) Tanzania

Government strengthens enforcement of cross-border trade regulations

The Ministry of Agriculture issued a public notice informing traders of stricter verification of export licenses and export permits for all export consignments of agricultural commodities with immediate effect. Tanzania has typically required exporters to possess both export licenses (issued annually by the Ministry of Trade through the Business Registration and Licensing Agency) and export permits (issued for specific commodities, quantities, time and destination by the Ministry of Agriculture). However, anecdotal evidence from exporters reveal that in recent times, border officials have been lax about these 2 documents, which implied that they were no longer necessary for export trade. Therefore, the immediate enforcement action by the government caused long queues of trucks at Tanzania's border crossings with Kenya, a key export market for the country's food commodities. EAGC continues to monitor developments at key border crossings and will continuously update members.

(f) Rwanda

MOU signed between Rwanda and TRASE

Rwanda Food and Drug Authority (Rwanda FDA) and the Rwanda Inspectorate, Competition and Consumer Protection Authority (RICA), on Friday, June 17, signed a Memorandum of Understanding (MoU) with Trade in

Agriculture Safely and Efficiently in East Africa (TRASE), a U.S. Department of Agriculture (USDA) Food for Progress (FFPr)-funded project, to improve Sanitary Phytosanitary (SPS) measures in the country which hampers trade in the region.

6. OUTLOOK FOR Q3 2022

The main crop harvests from Tanzania (maize and rice) and Uganda (maize) are likely to peak during this period. This should help cool down prices in these two countries and increase tradeable stocks of these commodities to regional markets.

This should, in turn, boost imports into Kenya, particularly for maize. Coupled with a harvest from Western Kenya, maize prices may therefore decline; however, they are unlikely to return to relatively normal levels given the unprecedently high prices currently in the market.

The duty-free import window for 540,000MT of white non-GMO maize created by Gazette Notice No. 5544 of the Government of Kenya of expires on 6th August 2022. The window has so far failed to ease shortage or cool down maize prices in the country, and stake-holders are engaging government to extend the window beyond 6th August. Should this engagement be successful, maize prices could decrease and offer some relief to millers and consumers.

GLOSSARY

AFA - Agriculture and Food Authority
AKEFEMA - Association of Kenya Feed Manufacturers
CET - Common External Tariff of the East African Community
CMA - Cereal Millers Association
COMESA - Common Market for Eastern and Southern Africa
DDGS - Dried Distillers Grains with Solubles
EAC - East African Community
FAO - Food and Agriculture Organization of the United Nations
FAW - Fall Armyworm
GMO - Genetically Modified Organisms
IGAD - Intergovernmental Authority on Development
ICPAC - IGAD Climate Prediction & Applications Centre
KEBS - Kenya Bureau of Standards
MAM - March to May rain season
Rwanda FDA - Rwanda Food and Drug Authority
RICA - Rwanda Inspectorate, Competition and Consumer Protection Authority
SNNPR - Southern Nations, Nationalities and People's Republic region of Ethiopia
TRASE - Trade in Agriculture Safely and Efficiently in East Africa projectUGMA - United Grain Millers Association
USDA (FFPr) - U.S. Department of Agriculture (USDA) Food for Progress program

LIST OF REFERENCE

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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); 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.

ATPAF ESA
Agricultural Trade Policy Advisory Forum for Eastern & Southern Africa
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GRAIN BUSINESS INSTITUTE
A service of EAGC

G-Soko
Grain Trading System
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RATIN
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Crop Monitor ICPAC
Prepared by members of the GEOGLAM Community of Practice, Coordinated by the IGAD Climate Prediction and Application Center

HARVEST
EARTH DATA FOR INFORMED AGRICULTURAL DECISIONS

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