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Report Highlights:

FAS Dar es Salaam anticipates corn production will decline 6 percent in marketing year (MY) 2024/25 as farmers switch to alternative crops due to low corn prices. MY 2024/25 wheat imports are anticipated to reach 1.3 million metric tons (MT) as rising incomes and growth in the tourism and hospitality sectors increase demand for wheat products. Rice production for MY 2024/25 is anticipated to increase by 115,000 MT due to higher area harvested as some farmers switch from corn to rice, however yields will likely be negatively impacted by an outbreak of bacterial leaf blight.

Corn

Table 1: Production, Supply, and Distribution (PS&D)

Corn Market Year Begins Tanzania, United Republic of	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4000	4000	4000	4200		4000
Beginning Stocks (1000 MT)	1413	1401	1103	1076		1036
Production (1000 MT)	5900	5900	5900	6400		6000
MY Imports (1000 MT)	40	40	30	30		30
TY Imports (1000 MT)	40	40	30	30		30
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	7353	7341	7033	7506		7066
MY Exports (1000 MT)	450	415	400	170		170
TY Exports (1000 MT)	300	255	400	170		170
Feed and Residual (1000 MT)	500	550	500	500		450
FSI Consumption (1000 MT)	5300	5300	5400	5800		5630
Total Consumption (1000 MT)	5800	5850	5900	6300		6080
Ending Stocks (1000 MT)	1103	1076	733	1036		816
Total Distribution (1000 MT)	7353	7341	7033	7506		7066
Yield (MT/HA)	1.475	1.475	1.475	1.5238		1.5
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Corn begins in October for all countries. TY 2024/2025 = October 2024 - September 2025						

Production

Post forecasts MY 2024/25 production will decline 400,000 MT year-on-year to 6 million MT largely due to decreases in area harvested. Area harvested is expected to decrease 5 percent from MY 2023/24 to 4 million hectares as farmers respond to lower corn prices during the planting season and switch to alternative crops such as rice and potatoes. In late December 2023, grain traders reported corn prices as low as \$300 per MT, half the price received during the same period in 2022. According to local sources, corn prices are likely lower due to an increase in local supply following a recovery from drought conditions in MY 2022/23 and more corn remaining in the Tanzania market due to new export procedures implemented by the GoT in July 2023 (for more on these procedures see the Policy section below). Post anticipates yields will decline slightly from MY 2023/24 due to heavy rainfall during the planting season which is likely to leach out needed nutrients from the soil during the growing season and waterlog new corn stalks.

Fertilizer prices remain high but relatively unchanged from levels seen last year (Table 2). Tanzania farmers continue to have limited access to fertilizer despite efforts by the GoT to subsidize prices. Subsidized fertilizer is frequently kept in towns far from farmers’ fields or arrives too late in the season to improve productivity. In general, fertilizer is underused in Tanzania with application rates equal to 28 to 40 percent of soil requirements. More than 90 percent of Tanzania’s fertilizer supply is imported.

Table 2: Fertilizer Prices per 50 kg Bag, September 2023

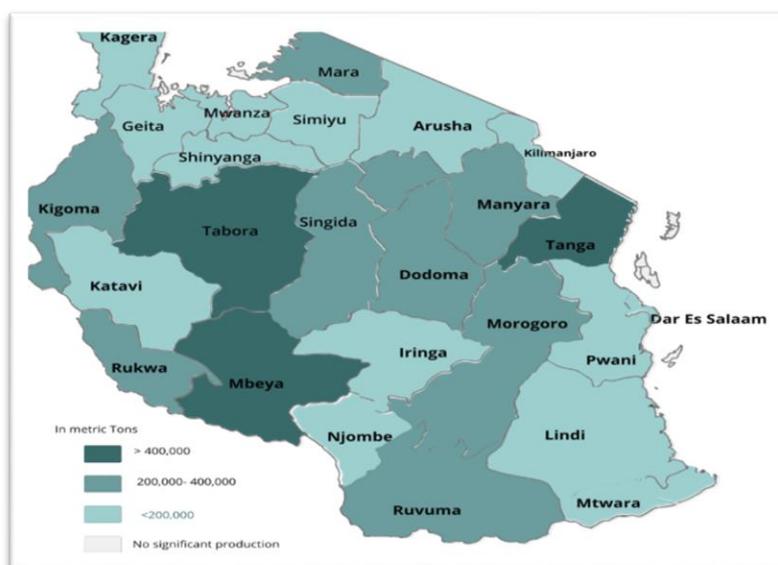
Fertilizer Type	Low Indicative Price (Tsh)	High Indicative Price (Tsh)
DAP	67,625	80,000
UREA	58,568	70,000
CAN	48,671	65,000
SA	39,152	50,000
NPKs	67,935	80,000

Source: TFRA. As of March 2024, 10,000 Tanzania Shillings equal \$3.80

Tanzania farmers continue to struggle with pest and disease issues such as Fall Army Worm and Maize Lethal Necrosis. Local sources report that these infestations are neither more or less severe than conditions in MY 2023/24.

Tanzania’s main agro-ecological zone for corn production lies between 500 and 1,500 meters above sea level. The Southern Highlands and Lake Regions account for 26 and 25 percent, respectively, of Tanzania’s corn-producing area (Figure 1). These areas are followed by the Eastern Region (13 percent), Northern Region (12 percent), Western Region (10 percent), Southern Region (8 percent), and Central Region (6 percent).

Figure 1: Corn Growing Areas in Tanzania



Source: Tanzania Ministry of Agriculture, Annual Sample Survey, 2020/21.

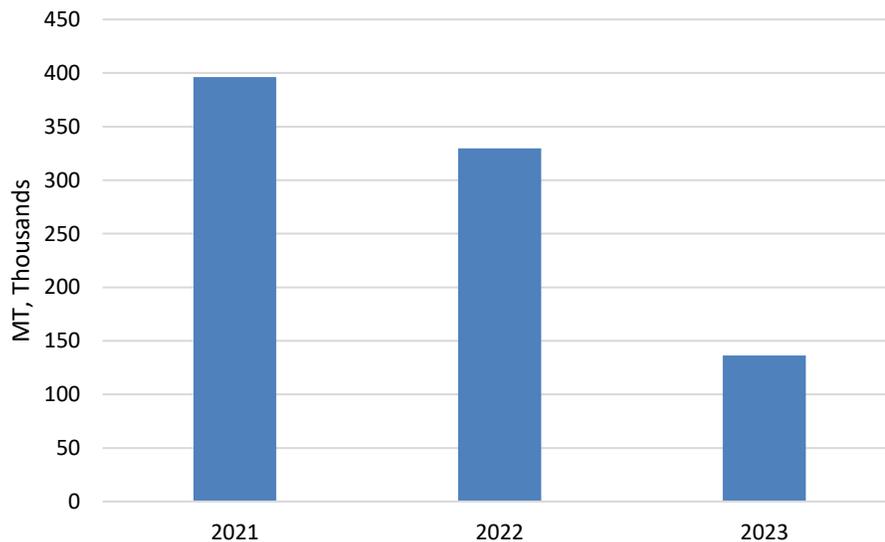
Changes to MY 2023/24

Post revises its MY 2023/24 production estimate up 3 percent to 6.4 million MT due to timely rainfall during the growing season. MY 2023/24 yields are estimated to recover from drought conditions the year before, but remain below historical levels due to post-harvest losses caused by heavy off-season rainfall during the harvest period.

Policy

In July 2023, the GoT implemented new procedures for exporting grain which local sources have cited as a *de facto* barrier against grain shipments to markets outside of Tanzania. In particular, local sources have identified new restrictions requiring foreign buyers to exclusively source grain from Tanzanian traders registered with the GoT. Historically foreign buyers purchased grain directly from Tanzanian farmers at farmgate prices. According to local sources, the new procedures have constrained grain exports as there are relatively few registered Tanzania traders for foreign buyers to contract with and these traders typically channel most of their sales into the Tanzania domestic market. Additionally, this measure is likely to increase the price of Tanzanian corn to foreign markets as it introduces another step in the value chain for foreign buyers, raising corn prices to international markets from their farmgate base. Following the enforcement of these new export procedures, Tanzania corn exports fell almost 60 percent year-on-year (see Figure 2) totaling 136,000 MT from July to December 2023.

Figure 2: Tanzania Corn Exports, July to December



Source: Trade Data Monitor, LLC.

Trade

Post forecasts MY 2024/25 exports will remain unchanged year-on-year at 170,000 MT as foreign buyers continue to face restrictions against sourcing grain directly from farmers. Additionally, Post anticipates demand for Tanzania corn will remain low in regional export markets such as Kenya due to increased domestic production in neighboring countries. Post estimates Kenya's corn production will reach 3.7 million MT in MY 2023/24 and MY 2024/25, up almost 28 percent from MY 2022/23 as the country recovers from drought conditions. Kenya is Tanzania's largest export market, claiming more than 90 percent of Tanzania's exports, according to available trade data (Table 3).

Table 3: Tanzania Exports by Destination Country (July to June)

Country	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Kenya	78,667	93,534	169,435	146,873	708,978	412,755
Zimbabwe	0	0	34,156	30	0	0
Ghana	0	0	22	0	0	0
Australia	0	0	0	0	0	10

Source: Trade Data Monitor, LLC.

MY 2024/25 imports are anticipated to remain flat at 30,000 MT. Tanzania primarily imports seed corn and corn-based consumer products such as breakfast cereals. Historically Tanzania has sourced most of its imports from Zambia and South Africa (Table 4).

Table 4: Tanzania Imports by Destination Country (July to June)

Country	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Zambia	44,414	9,070	10,414	9,704	13,305	40,565
South Africa	1,823	33,392	27,257	1,067	1,086	708
Kenya	954	514	257	2,661	2,028	313
India	0	80	235	0	0	192

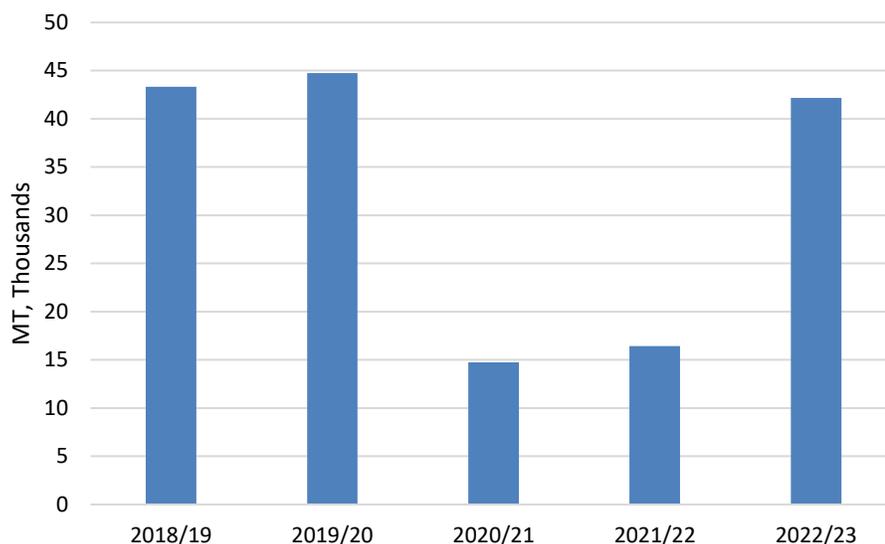
Source: Trade Data Monitor, LLC.

Changes to MY 2022/23

Post revises its MY 2023/24 export forecast down from 425,000 to 170,000 MT due to reported difficulties associated with Tanzania's new export procedures and reduced demand for Tanzania corn in Kenya's market.

Post maintains its MY 2023/24 import estimate of 30,000 MT as higher domestic production reduces the need to import corn for Tanzania's feed sector. In MY 2022/23, imports reached more than 40,000 MT as drought conditions in Tanzania caused feed manufacturers to source corn from Zambia to supplement low domestic supplies (Figure 3).

Figure 3: Tanzania Corn Imports (July to June)



Source: Trade Data Monitor, LLC.

Consumption

Post forecasts MY 2024/25 consumption will decrease to 6.08 million MT from 6.3 million MT the year before due to decreased local supply as farmers respond to low corn prices by switching production to other crops such as potato and rice.

MY 2024/25 feed consumption is anticipated to decline 10 percent to 450,000 MT as poultry and livestock farmers either reduce their flocks or exit production due to high protein feed costs. Local feed manufacturers report that a majority of soybean extruders in Tanzania have closed operations as they cannot source affordable soybeans for crushing. Tanzania primarily relies on soy as a protein source for its feed manufacturing. Most soy for animal feed is imported from countries such as Malawi and Zambia, however according to local sources imports from these countries have stalled due to ongoing trade frictions. In late 2023, the GoT halted imports of soybeans from Malawi citing the presence of tobacco ring-spot virus, a disease not currently present in Tanzania. In February 2024, the GoT formally removed its ban on Malawi soybeans, however traders report that they still experience difficulty bringing soybeans across the Malawi-Tanzania border. Similarly in 2023, the GoT increased surveillance of Zambia soybeans for genetically engineered traits, slowing imports. Currently no GE products are approved for commercial use in Tanzania.

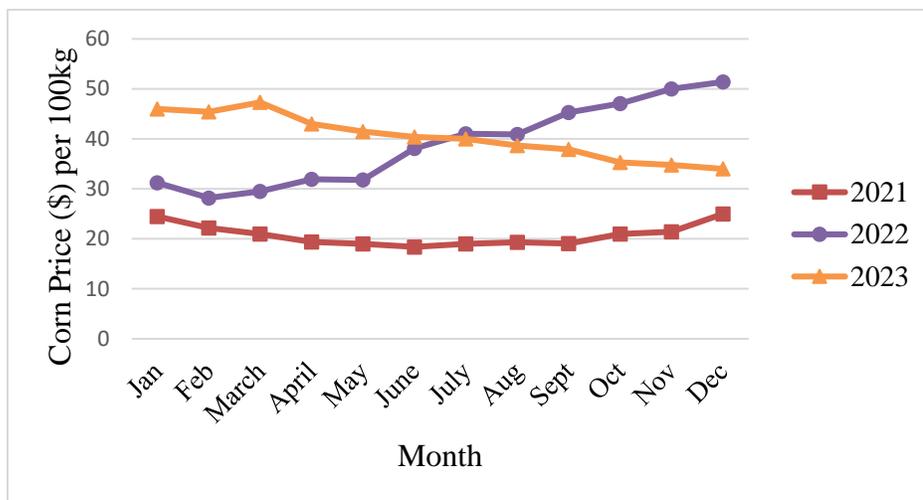
Changes to MY 2023/24

Post revises MY 2023/24 FSI consumption up 7 percent to approximately 5.8 million MT due to low prices triggered by high domestic production, and reduced exports associated with new trading procedures and lower import demand for corn in Kenya. Feed consumption is revised down to 500,000 MT due to reduced animal feed demand as poultry and livestock producers reduce operations due to high protein costs.

Marketing

Post anticipates MY 2024/25 prices may increase slightly from MY 2023/24 due to lower production as farmers switch farmland to alternative crops. Beginning in August 2023, corn prices began to fall below 2022 levels as Tanzania's corn harvest recovered from drought conditions the year before (see Figure 4).

Figure 4: Monthly Tanzania Corn Prices



Source: Bank of Tanzania, Ministry of Industry and Trade

Stocks

FAS Dar es Salaam forecasts MY 2024/25 ending stocks will decrease to 816,000 MT as lower production reduces available corn supplies. Stocks are held by millers, farmers, grain traders and the National Food Reserve Agency (NFRA). As of November 2023, the NFRA was holding 244,223 MT in its warehouses (see Table 5). Currently, the NFRA owns 30 storage facilities with a total storage capacity of 286,000 MT.

Table 5: Corn Stocks Held by the Tanzania National Food Reserve Agency (NFRA), MT

Month	2019	2020	2021	2022	2023
January	93,037	43,597	110,398	207,899	124,736
February	85,525	41,231	110,389	203,297	106,881
March	78,336	39,597	109,231	200,626	80,123
April	68,748	38,053	109,231	190,366	63,808
May	68,058	38,291	108,284	149,402	51,367
June	67,336	52,725	107,384	141,576	46,665
July	67,410	90,255	107,384	140,695	94,088
August	68,407	92,991	123,635	144,410	210,020
September	61,711	109,733	150,057	149,044	244,169
October	55,853	110,895	192,408	151,794	244,289
November	52,727	110,289	209,057	147,401	244,223
December	52,498	110,398	214,968	137,655	248,282

Source: Bank of Tanzania (BOT), National Food Reserve Agency (NRFA)

Wheat

Table 6: Wheat: Production, Supply, and Distribution (PS&D)

Wheat Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	60	60	60	55		55
Beginning Stocks (1000 MT)	69	85	114	100		98
Production (1000 MT)	75	75	75	73		73
MY Imports (1000 MT)	1170	1170	1300	1225		1300
TY Imports (1000 MT)	1170	1170	1300	1225		1300
TY Imp. from U.S. (1000 MT)	38	0	0	0		0
Total Supply (1000 MT)	1314	1330	1489	1398		1471
MY Exports (1000 MT)	0	0	0	0		0
TY Exports (1000 MT)	0	0	0	0		0
Feed and Residual (1000 MT)	0	0	0	0		0
FSI Consumption (1000 MT)	1200	1230	1350	1300		1375
Total Consumption (1000 MT)	1200	1230	1350	1300		1375
Ending Stocks (1000 MT)	114	100	139	98		96
Total Distribution (1000 MT)	1314	1330	1489	1398		1471
Yield (MT/HA)	1.25	1.25	1.25	1.3273		1.3273
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025						

Production

MY 2024/25 production is estimated to remain unchanged year-on-year at 73,000 MT as farmers face similar conditions from the year before. Despite increasing domestic demand for wheat products, according to local sources wheat remains less attractive to farmers compared to other food staples such as corn and rice due to low productivity and profitability. Access to improved wheat varieties remains low and many farmers save their seeds for planting in the next season, lowering yields. Tanzania's wheat yields are also negatively affected by insufficient government subsidized fertilizer and occasional pest and disease outbreaks such as wheat stem rust.

Tanzania wheat production is concentrated in the Arusha, Manyara, and Kilimanjaro regions (near the Kenya-Tanzania border), and the Mbeya, Iringa, Njombe, and Rukwa regions (along the Tanzania-Zambia Highway and Malawi and Zambia borders).

Changes to MY 2023/24

Post estimates MY 2023/24 production will decrease 3 percent year-on-year to 73,000 MT, largely due to a decline in area harvested as farmers replaced wheat with beans and peas in the Southern Highlands (Mbeya, Iringa, and Njombe). According to industry sources, farmers were encouraged to switch by higher bean and pea prices. MY 2023/24 yields are estimated to recover from MY 2022/23 drought conditions.

Consumption

MY 2024/25 consumption is anticipated to increase almost 6 percent to 1.375 million MT as demand for wheat products continues to grow, particularly in urban areas among middle and upper-income consumers. Rising incomes have increased demand for wheat products as consumers with more disposable income buy new goods utilizing wheat as a primary ingredient. According to World Bank data, Tanzania's per-capita income grew 4 percent in 2022, reaching \$1,900 and has increased more than 50 percent since 2010. Commonly consumed wheat products include chapati (an Indian flat bread), mandazi (an African donut), bread, and cakes. Growth wheat products include pizza, pasta, cookies, and breakfast cereals.

Wheat consumption is also likely rising due to increased travel to Tanzania by international tourists who regularly consume wheat-based products provided by the hotel and tourism sectors. According to the Bank of Tanzania, 2023 annual tourism revenue grew 30 percent year-on-year reaching \$3.4 billion. Similarly, 2023 international arrivals were up 24 percent year-on-year, totaling 1.8 million tourists.

Changes to MY 2023/24

Post revises its MY 2023/24 forecast up to 1.3 million MT as rising incomes drive higher demand for wheat-based products. MY 2023/24 consumption will also likely increase due to the removal of tariffs on wheat imports from outside the East Africa Community (EAC) from July 2023 to June 2024 (see the Policy section below). This decision waives a 10 percent tariff on most of Tanzania's wheat supplies, reducing costs to consumers.

Policy

In July, 2023, the EAC granted Tanzania permission to waive tariffs on wheat imports for five designated millers and processors. Under this policy, Tanzania buyers can import wheat duty-free from outside the EAC after all domestic wheat has been sold. These five millers and processors regularly buy the majority of wheat imported into Tanzania. The GoT usually applies a tariff of 10 percent on wheat imports from outside the EAC. The tariff-free window will expire in June 2024; however Tanzania has the option to request an extension on an annual basis.

Trade

FAS Dar es Salaam anticipates MY 2024/25 wheat imports will increase 6 percent to 1.3 million MT to meet growing consumer demand. Wheat imports account for more than 90 percent of Tanzania's supplies and are primarily sourced from outside the EAC (see Table 7 below). Tanzania wheat importers are price-sensitive and will frequently switch country sources based on lower costs and greater availability. Tanzania's largest wheat supplier is Russia, which historically has supplied more than 50 percent of Tanzania's wheat imports. While Russia trade data has not been available since 2021, industry sources note that Russia continues to account for a majority of Tanzania's wheat supply.

Table 7: Major Wheat Exporters to Tanzania, Calendar Year, MT

Country	2019	2020	2021	2022	2023
Russia	516,097	700,911	377,123	*	*
EU 27	172,783	214,188	4,111	228,797	226,250
Turkey	21,303	45,522	44,985	41,083	68,225
Canada	48,699	33,425	29,499	36,300	53,459
Australia	1,005	903	200,867	108,198	1,046
Ukraine	53,739	46,620	113,595	49,251	0
Argentina	0	0	66,112	81,900	0
India	13	45	71	47,698	221
United States	102,735	0	0	0	0

Source: Trade Data Monitor

*Import data from Russia is not available for 2023.

Wheat imports are controlled by the GoT which sets an import quota through the issuance of import permits. Under this system, the GoT estimates total demand for wheat and issues import permits until this demand is met, restricting additional imports. For MY 2023/2024, the GoT has set an initial demand estimate of 1 million MT of wheat to guide issuance of import permits.

Changes to MY 2023/24

Post revises its MY 2023/24 import estimate up 10 percent to 1.225 million MT as rising domestic demand and lower tariffs facilitate higher imports. According to industry sources, MY 2023/24 Russia imports remain robust and still account for most wheat arriving in Dar es Salaam.

Marketing

Prices in Tanzania are largely set by global prices as most wheat is imported. 2023 prices fell significantly from the year before, averaging \$77.75 per 100 KG, compared to \$185 per 100 KG in 2022 (Tables 8 and 9). This price drop is likely in part due to lower Russia wheat prices. As of March 2024, Russian global wheat prices have declined 33 percent year-on-year.¹ The price of wheat flour within Tanzania fluctuates depending on transportation costs from Dar es Salaam where all mills are situated.

¹ For more on global wheat prices, see the USDA Grain World Markets and Trade Circular: [Grain: World Markets and Trade | USDA Foreign Agricultural Service](#).

Table 8: Average Wheat Price in Tanzania, Jan to Dec 2023, (Prices in \$ per 100Kg)

Region	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Arusha	63	63	61	60	58	56	55	59	59	59	78	80
DAR	80	78	78	78	78	86	90	102	102	105	105	10
Dodoma	60	86	86	86	86	86	86		89	89	85	78
Iringa	78	78	78	74	78	86	78	75	98	92	92	92
Katavi	60	86	86	90	110	100	95	86	71	71	71	71
Kili	63	63	70	72	74	78	78	78	80	84	86	92
Lindi	78	78	78	80	86	80	79	59	61	65	71	71
Moro	60	86	86	86	90	157	98	102	102	100	97	95
Mtwara	63	63	65	74	78	78	80	85	90	86	86	88
Mwanza	0	78	78	80	78	80	59	60	60	65	70	70
Njombe	60	86	86	86	86	98	90	85	51	51	51	60
Rukwa	63	63	70	80	98	90	90	86	67	78	78	80
Ruvuma	78	78	78	86	86	69	71	78	50	50	70	86

Source: Bank of Tanzania, Ministry of Industry and Trade

Table 9: Average Wheat Price in Tanzania, Jan to Dec 2022, (Prices in \$ per 100Kg)

Region	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Arusha	110	120	120	150	150	140	150	170	140	150	140	150
Dar	150	180	200	250	250	22	200	200	220	220	200	200
Dom	150	165	170	176	174	182	182	182	182	182	182	183
Iringa	150	150	150	200	200	200	180	200	200	200	200	200
Kag	150	140	140	220	220	220	250	220	210	200	200	200
Kili	140	140	140	160	150	140	150	160	150	160	150	140
Man	180	180	200	220	230	200	200	230	230	210	210	210
Kigm	150	150	180	180	250	250	200	200	200	180	200	200
Moro	150	160	170	175	180	220	220	220	230	230	230	230
Njb	180	180	180	180	220	200	200	200	220	230	250	250
Tanga	140	130	170	170	182	200	200	200	200	200	200	200

Source: Bank of Tanzania, Ministry of Industry and Trade

Stocks

FAS Dar es Salaam forecasts MY 2023/24 and MY 2024/25 ending stocks will remain largely unchanged year-on-year at 96,000 and 98,000 MT respectively. Tanzania wheat stocks are held by traders and millers in stores and warehouses.

Rice

Table 10: Rice: Production, Supply, and Distribution (PS&D) Table

Rice, Milled Market Year Begins Tanzania, United Republic of	2022/2023		2023/2024		2024/2025	
	May 2022		May 2023		May 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1000	1000	1100	1100		1125
Beginning Stocks (1000 MT)	0	100	0	85		100
Milled Production (1000 MT)	2200	2200	2400	2450		2515
Rough Production (1000 MT)	3333	3333	3636	3712		3811
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600		6600
MY Imports (1000 MT)	400	375	350	400		415
TY Imports (1000 MT)	480	470	325	400		415
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	2600	2675	2750	2935		3030
MY Exports (1000 MT)	50	25	50	10		10
TY Exports (1000 MT)	50	50	50	10		10
Consumption and Residual (1000 MT)	2550	2565	2700	2825		2920
Ending Stocks (1000 MT)	0	85	0	100		100
Total Distribution (1000 MT)	2600	2675	2750	2935		3030
Yield (Rough) (MT/HA)	3.333	3.333	3.3055	3.3745		3.3876
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2024/2025 = January 2025 - December 2025						

Production

Post estimates MY 2024/25 production will increase 3 percent to 2.515 million MT largely due to an expansion in area harvested. Local sources report that many farmers are switching from corn to rice during the planting season as maize prices are currently half as low compared to same period in 2023. Area harvested is also expected to expand as a result of ongoing GoT efforts to provide irrigation for rice production through the National Rice Development Strategy Phase II (NRDS-II) which seeks to reach 2.2 million hectares under rice production by 2030. While area harvested is expanding, local sources report the rate of growth is constrained by limited access to water resources. Post forecasts MY 2024/25 area harvested will increase 25,000 hectares to 1.125 million.

MY 2024/25 yields are expected to remain below historical levels due to an outbreak of bacterial leaf blight which has spread to all rice-growing areas. The first outbreak occurred in 2022 and efforts to control it to confined areas have not succeeded. Bacterial leaf blight causes wilting and yellowing of leaves and can result in yield losses of 70 percent.

Changes to MY 2023/24

Post revises its MY 2023/24 production estimate up 2 percent to 2.45 million MT due to increased acreage associated with irrigation schemes in Morogoro, the Southern Highlands and the Northern Region. Yields are expected to recover from drought conditions in MY 2022/23, however they will remain below historical levels due to damage associated with bacterial leaf blight and floods in January and February 2024 which caused losses in Morogoro and the Northern Region.

Consumption

MY 2024/25 consumption is anticipated to increase 95,000 MT to 2.92 million MT, largely driven by increasing demand in urban areas. Dar es Salaam, Tanzania's largest city, accounts for more than 60 percent of national consumption. While a majority of Tanzania's population resides in rural areas, Tanzania's urbanization rate has steadily increased over time, growing from 28 percent in 2010 to 37 percent in 2022 according to the World Bank. According to local sources, urban consumers increasingly view rice as an easy-to-prepare food staple at home which cooks more quickly and requires less energy to prepare than corn.

Changes to MY 2023/24

Post revises its MY 2023/24 estimate up 11 percent to 2.825 million MT as increased domestic production increases available supplies and lowers consumer prices. As of December 2023, rice prices had declined 20 percent year-on-year due to a recovery from MY 2022/23 drought conditions (Table 11).

Table 11: National Average Wholesale Prices of Rice in Tanzania (US \$/100 kg)

Month	2020	2021	2022	2023
Jan	82	62	90	113
Feb	82	54	89	115
March	77	61	89	116
April	78	62	95	118
May	70	59	98	116
June	66	58	101	104
July	64	59	100	100
Aug	63	60	106	97
Sept	62	61	177	102
Oct	60	65	131	104
Nov	62	67	135	107
Dec	62	71	138	110

Sources: Bank of Tanzania and Ministry of Industry and Trade.

Trade

FAS Dar es Salaam anticipates MY 2024/25 imports will reach 415,000 MT to meet growing consumer demand. Tanzania sources most of its rice from outside the EAC, primarily from India, Pakistan, and Thailand (Table 12).

Table 12: Major Rice Exporters to Tanzania, Calendar Year, MT

Country	2019	2020	2021	2022	2023
Pakistan	146,444	107,327	53,727	109,152	228,134
India	7,628	23,646	34,525	68,065	194,577
Thailand	14,885	4,280	1,254	2,469	42,789
United States	0	10	21	21	0
China	260	1040	0	0	0

Source: Trade Data Monitor LLC

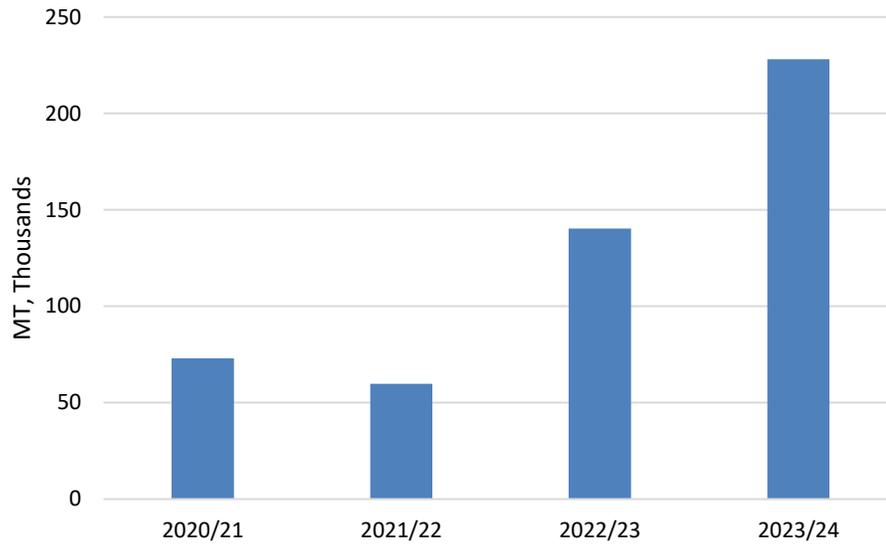
Tanzania applies a common external tariff of 75 percent *ad valorem* or \$345 per metric ton, whichever is higher, for imports from non-EAC countries. Similar to wheat, the GoT controls rice imports through an import quota system under which import permits are issued to supplement domestic production. Unlike wheat, the GoT does not issue a preliminary demand estimate or blanket target to guide the issuance of permits. Instead import permits are granted on an as-needed basis until the GoT determines that local demand has been met.

MY 2024/25 exports are anticipated to remain low at 10,000 MT as traders report difficulty navigating Tanzania's new grain export procedures (see Policy under the corn section) and high domestic demand encourages sales to the domestic market.

Changes to MY 2023/24

Post revises its MY 2023/24 import forecast up to 400,000 MT as imports from Pakistan and India supplement domestic supplies to meet growing demand. In February 2023, the GoT authorized import permits for an additional 90,000 MT of rice. Post estimates that much of this rice arrived in Dar es Salaam at the beginning of MY 2023/24. As of December 2023, Tanzania year-to-date imports stood at nearly 230,000 MT, a 62 percent increase from 2022/23 (see Figure 5).

Figure 5: Tanzania Rice Imports, May to December



Source: Trade Data Monitor, LLC

Post revises MY 2023/24 exports down 20,000 MT to 10,000 MT as traders report difficulties sourcing rice associated with new GoT export procedures.

Stocks

Post estimates MY 2024/25 ending stocks will remain unchanged at 100,000 MT. All rice stocks in Tanzania are held by farmers, cooperative warehouses, traders, millers and the government.

Attachments:

No Attachments