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Report Name: Grain and Feed Annual

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Report Highlights:

FAS Dar es Salaam expects a ten percent decline in corn exports for marketing year (MY) 2025/26 as production decreases and strict export permit procedures continue to stymie shipments. Wheat imports are projected to rise by 15.4 percent due to low corn supply, rising incomes, dietary changes, and growth in tourism. Rice markets are forecasted to remain broadly unchanged, with only minor increases in area planted in response to favorable domestic prices.

Corn

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

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4200	4200	4300	4100	0	4000
Beginning Stocks (1000 MT)	1088	1088	1348	1048	0	370
Production (1000 MT)	7000	6400	8000	7000	0	6800
MY Imports (1000 MT)	30	30	30	30	0	30
TY Imports (1000 MT)	30	30	30	30	0	30
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	8118	7518	9378	8078	0	7200
MY Exports (1000 MT)	270	170	1200	1000	0	900
TY Exports (1000 MT)	400	170	1100	1300	0	900
Feed and Residual (1000 MT)	700	500	850	608	0	400
FSI Consumption (1000 MT)	5800	5800	5900	6100	0	5800
Total Consumption (1000 MT)	6500	6300	6750	6708	0	6200
Ending Stocks (1000 MT)	1348	1048	1428	370	0	100
Total Distribution (1000 MT)	8118	7518	9378	8078	0	7200
Yield (MT/HA)	1.6667	1.5238	1.8605	1.7073	0	1.7
(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 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

FAS Dar es Salaam anticipates corn production for the marketing year (MY) 2025/26 will decrease by 200,000 metric tons (MT), or around three percent, reducing the total output to 6.8 million metric tons. The decline is largely attributed to factors such as below-average rainfall during the short rains season ("Vuli") from October to December 2024, untimely distribution of government-subsidized certified seeds and fertilizer during the planting season, infestations of pests and diseases like the Fall Armyworm, and a reduction in the harvested area.

Post forecasts area harvested to decrease by 2.44 percent to four million hectares as farmers adjust to the delayed and below-average rainfall, as well as the late distribution of government-subsidized fertilizer and seeds. Despite the government's efforts to subsidize seed and fertilizer prices, small-scale farmers continue to face significant challenges in accessing these inputs.

Notably, total rainfall across Tanzania increased two percent in calendar year 2024 when compared to calendar year 2023; increases that are likely associated with El Niño. Much of this rain fell early in the year, leading to flooding in April and May 2024. Despite the total annual increase in rainfall, the 2024 "Vuli" rain season was markedly drier than the 2023 season. Tanzanian official rainfall data show that 2024 October to December rainfall was 39 percent below 2023 rainfall during the same period. Post expects these unusual weather patterns to negatively impact corn production.

Post anticipates a slight decrease in yield to 1.7 metric tons per hectare (MT/HA) due to untimely planting caused by delayed and below-average rainfall, along with delayed distribution of fertilizer and

seeds, which heavily impacts productivity. Many agro-dealers are in distant towns where the subsidized seeds and fertilizers are stored, and they often receive inputs after the planting season has begun. Farmers also complain that the government-subsidized inputs are often of low quality and that some unscrupulous agro-dealers sell these inputs at unsubsidized prices.

As of September 2024, the prices of subsidized fertilizers in Tanzania ranged between approximately $23 (USD) and $28 per 50-kilogram bag. Variation in subsidized prices reflected the purchaser's relative proximity to the Dar es Salaam port, given that Tanzania imports nearly 95 percent of the fertilizer utilized within the country. Comprehensive details on fertilizer prices can be accessed on the Tanzania Fertilizer Regulatory Authority website. Presented below is a summary of the subsidized fertilizer prices as of September 2024, coinciding with the preparations for the 2024/25 short rains planting season.

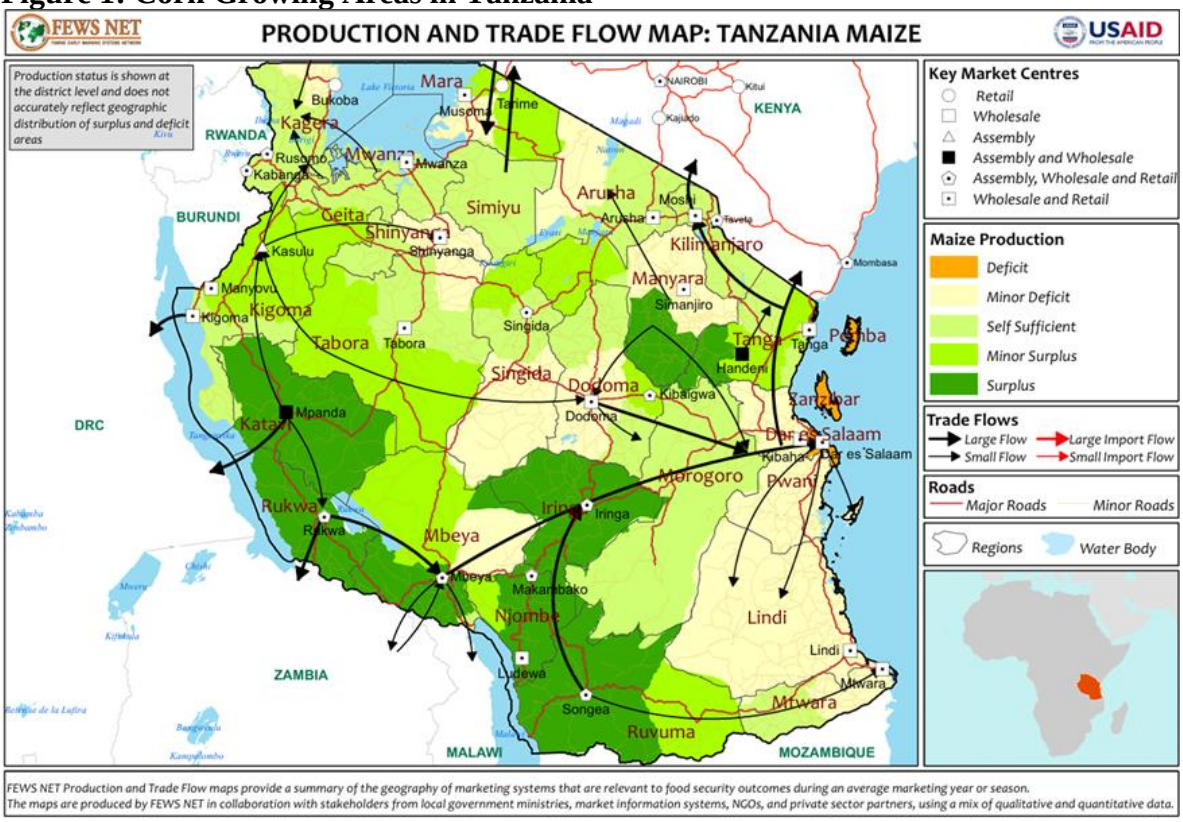
Table 2: Fertilizer Prices per 50 kg Bag, September 2024

Fertilizer Type	High Market Price (Tsh)	High Subsidized Price (Tsh)	Subsidy (Tsh)
DAP	113,319	85,000	32, 254
UREA	86,892	75,443	11,449
CAN	71,414	65,188	6,226
SA	58,343	55,444	2,899
NPKs	99,110	82,835	16,275

Source: TFRA. As of September 2024, 10,000 Tanzania Shillings equal USD 3.70

The primary agro-ecological zone for maize cultivation in Tanzania lies at altitudes ranging from 500 to 1,500 meters (approximately 1,640 to 4,921 feet) above sea level. The Southern Highlands and Lakes Regions are the main contributors to national maize production, contributing 26 and 25 percent, respectively. These regions are followed by the Eastern Region, which contributes 13 percent; the Northern Region, at 12 percent; the Western Region, at 10 percent; the Southern Region, at 8 percent; and the Central Region, at 6 percent.

Figure 1: Corn Growing Areas in Tanzania



Source: FEWS NET

Consumption

MY 2025/26 FSI consumption is projected to decrease by approximately five percent, reaching around 5.8 million metric tons from the previous year's 6.1 million metric tons. The decline is attributed to reduced local production. Post anticipates that the decline in corn consumption will result in food shortages, increased prices, and heightened food insecurity, particularly for low-income households. The World Food Programme (WFP) Tanzania's Preliminary Food Crop Production Assessment Report (2024) indicates that 23 District Councils may face food insecurity. Additionally, approximately 32 percent of children aged 6-59 months across the country are currently affected by chronic malnutrition. As corn becomes more costly or less accessible, individuals may turn to alternatives such as cassava and plantains. While these substitutes provide energy, they lack the nutritional diversity of corn, including sufficient protein and essential micronutrients. The shift could result in imbalanced diets and an increased risk of nutritional deficiencies, particularly among vulnerable groups like children and the elderly.

Feed and residual consumption is anticipated to decrease by approximately 34.2 percent to 400,000 MT, as poultry farmers, aquaculture, and livestock keepers reduce their flocks or cease production due to the high costs of protein and carbohydrate feeds. In turn, this will affect the supply and prices of animal products such as eggs, chicken, and fish. Local feed manufacturers report that most soybean crushers in Tanzania are operating below capacity or have shut down due to the inability to source affordable soybeans for crushing. Currently, genetically engineered (GE) products are not approved for commercial use in Tanzania. Tanzania primarily depends on soy as a protein source, and white corn as a

carbohydrate source for feed manufacturing, with most soy imports coming from Malawi and Zambia. However, imports from these countries have stalled due to low production caused by prolonged drought.

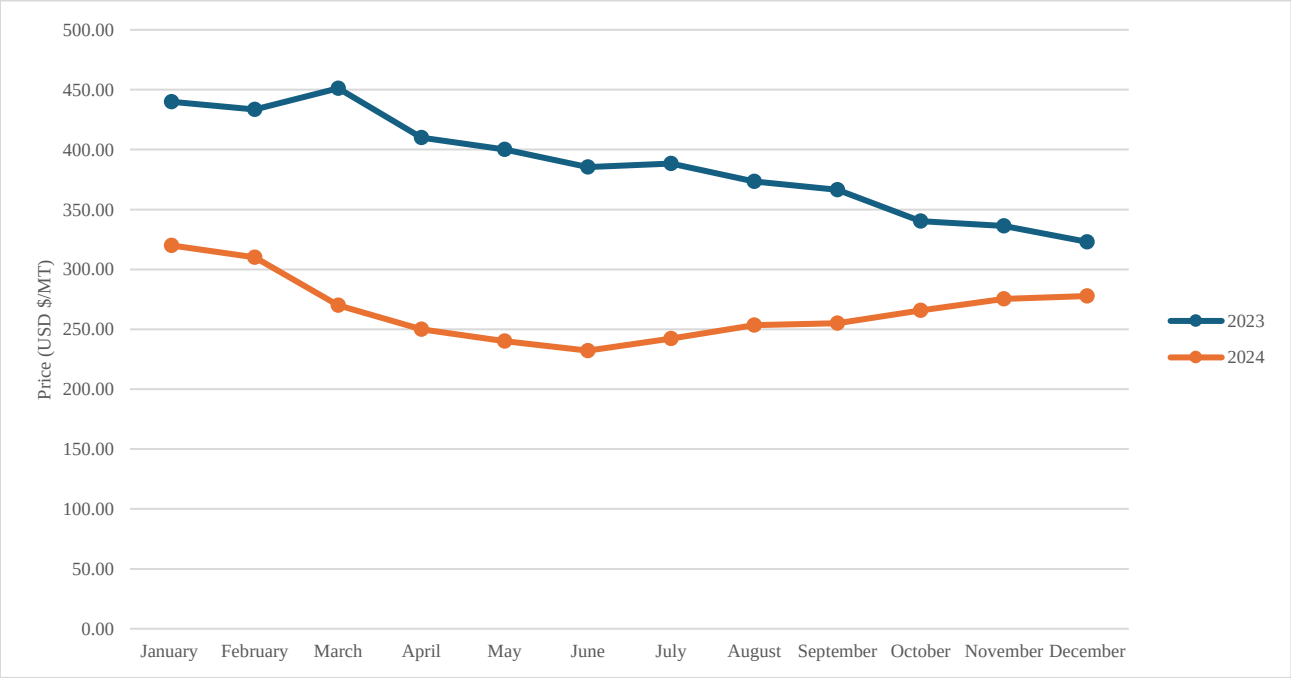
Post forecasts that in the marketing year 2025/26, corn prices may remain relatively high, with potential fluctuations driven by factors such as production levels and market demand. As of February 2025, the retail price range for maize in Tanzania was between $0.84 (USD) and $2.01 per kilogram (equivalent to TZS 1,991.26 to TZS 4,783.61 per kilogram). The wholesale price range was approximately $0.30 (USD) to $0.60 per kilogram (equivalent to TZS 800 to TZS 1,500 per kilogram). At the time of writing, the market price for corn in Tanzania is between $0.59 (USD) and $1.41 per kilogram. Various factors influencing the maize market in Tanzania include weather conditions, production levels, market demand, and regional trade dynamics.

Table 3: National Corn Prices January-December (USD/MT)

Month	2023	2024
January	440.00	320.00
February	433.40	310.00
March	451.20	270.00
April	410.00	250.00
May	400.00	240.00
June	385.40	232.20
July	388.50	242.20
August	373.50	253.50
September	366.50	255.00
October	340.40	265.70
November	336.20	275.40
December	323.00	277.70

Source: Bank of Tanzania, Ministry of Industry and Trade.

Figure 2: Corn Prices Trends January-December (USD/MT)



Source: Bank of Tanzania, Ministry of Industry and Trade

Trade

Post forecasts that corn exports for MY 2025/26 will decrease by ten percent year-on-year, reaching about 900,000 metric tons. This decline is primarily attributed to several factors. Low production levels due to adverse weather conditions and suboptimal farming practices have resulted in reduced exportable surplus. Additionally, traders are facing significant challenges in obtaining export permits through official channels, as the procedures have become increasingly stringent and bureaucratic. Many traders report encountering delays and difficulties in navigating the permit application process, which has hindered their ability to export grains efficiently.

Conversely, non-grain traders are reportedly acquiring permits at border crossings without possessing grains for export. This indicates potential inconsistencies and irregularities in the permit issuance process. These traders allegedly act as illegal brokers or middlemen by selling the export permits to grain traders. Furthermore, foreign buyers continue to face restrictions that prevent them from sourcing grains directly from farmers, adding another layer of complexity to the export process. These restrictions are aimed at ensuring that the local market has sufficient grain supplies, but they also create additional barriers for international trade.

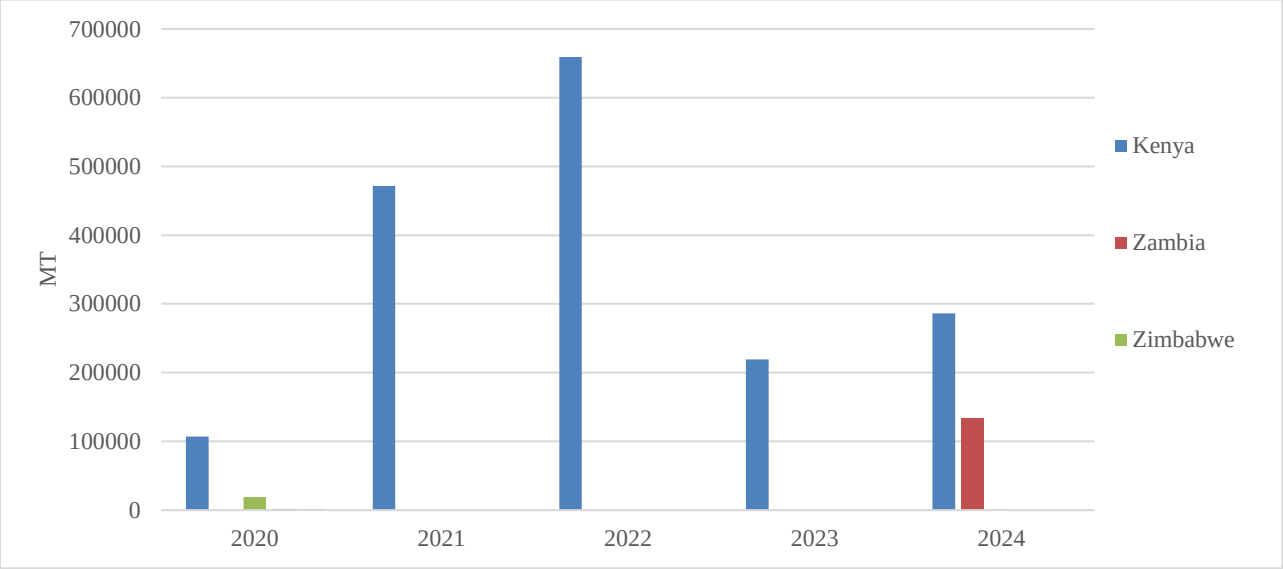
Post forecasts indicate that the demand for Tanzanian corn in regional export markets, particularly Kenya, is expected to remain low due to regulatory barriers and sourcing restrictions imposed by the Tanzanian government. Trade data reveals that Kenya is Tanzania's largest export market, accounting for over 90 percent of the country's corn exports. However, the reduced export demand has placed economic strain on Tanzanian smallholder farmers, potentially leading to nutritional deficiencies and economic instability within farming communities.

Table 4: Tanzania Exports by Destination Country (MT)

Reporter	2020	2021	2022	2023	2024
Kenya	106,813	471,571	658,969	219,260	286,124
Zambia	0	0	0	0	133,439
Zimbabwe	19,192	0	0	0	900

Source: Trade Data Monitor, LLC.

Figure 3: Trends of Tanzania Corn Exports (MT)



Source: Trade Data Monitor, LLC

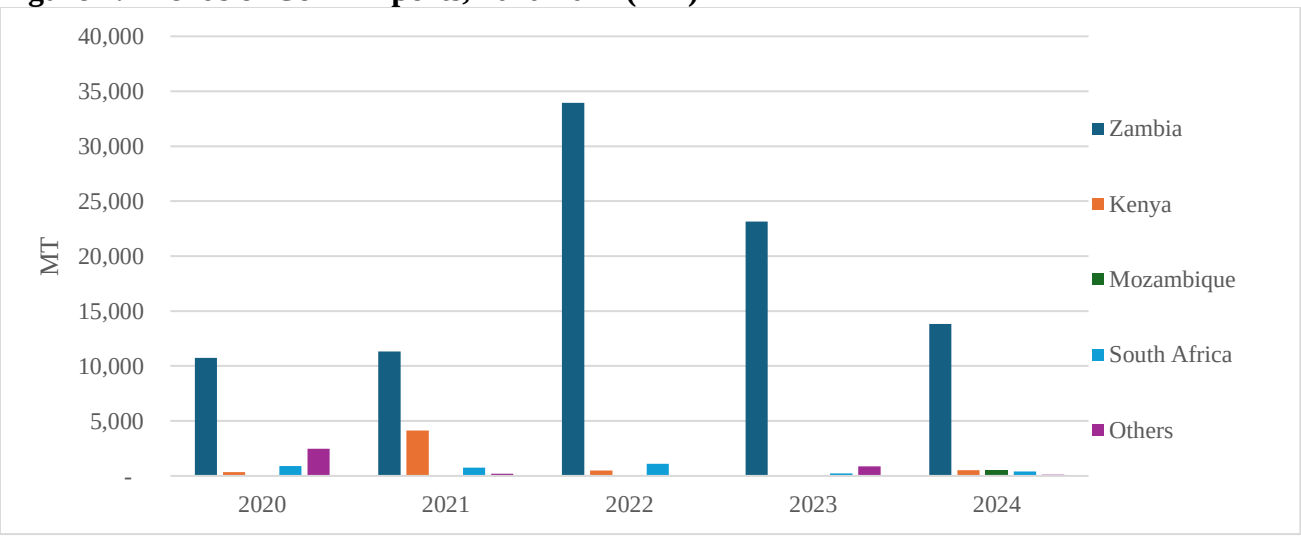
For MY 2025/26, Tanzania's corn imports are expected to remain at 30,000 metric tons, mainly from Zambia, Kenya, and Mozambique. The imports primarily consist of seed corn.

Table 5: Tanzania Corn Imports, 2020-2024 (MT)

	2020	2021	2022	2023	2024
Zambia	10,728	11,333	33,945	23,149	13,827
Kenya	356	4,137	484	37	530
Mozambique	0	0	0	0	508
South Africa	910	763	1,111	235	404
Others	2,456	207	4	883	102

Source: Trade Data Monitor

Figure 4: Trends of Corn Imports, 2020-2024 (MT)



Source: Trade Data Monitor

Tanzania imposes an import duty of 25 percent on the cost, insurance and freight (CIF) value of corn imports from non-East African Community (EAC) countries, along with an 18 percent Value Added Tax (VAT). Additional charges include a customs processing fee of 0.6 percent on the free on board (FOB) value, a railway development levy of 1.5 percent on the CIF value, and a wharfage charge of 1.6 percent on the CIF value on all port charges. Other potential charges may include handling, removal, corridor levy, transfer, stripping, storage, and movement charges, depending on the cargo's specifics. Tanzania is a member of several regional economic communities, including the EAC and the Southern Africa Development Community (SADC), facilitating duty-free intra-EAC trade and a common external tariff for non-EAC countries. Intra-Africa trade is significant, with corn being one of the top export products.

Stocks

Post forecasts that ending stocks for MY 2024/25 will decrease by approximately 73 percent year-on-year to 100,000 MT due to low production. Stocks are held by millers, farmers, grain traders, and the National Food Reserve Agency (NFRA). As of December 2024, the NFRA was holding 677,115 metric tons of corn. Currently, the NFRA owns 30 storage facilities with a total storage capacity of 400,000 tons. The NFRA has announced plans to expand its storage capacity to between 700,000 and 1,000,000 MT of grain by June 2025.

Table 6: Corn Stocks Held by the Tanzania National Food Reserve Agency (MT)

Month	2020	2021	2022	2023	2024
January	43,597	110,398	207,899	124,736	270,984
February	41,231	110,389	203,297	106,881	326,172
March	39,597	109,231	200,626	80,123	336,099
April	38,053	109,231	190,366	63,808	340,102
May	38,291	108,284	149,402	51,367	340,002
June	52,725	107,384	141,576	46,665	340,479
July	90,255	107,384	140,695	94,088	368,855
August	92,991	123,635	144,410	210,020	489,187
September	109,733	150,057	149,044	244,169	651,403
October	110,895	192,408	151,794	244,289	708,399
November	110,289	209,057	147,401	244,223	702,502
December	110,398	214,968	137,655	248,282	677,115

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

Wheat

Table 7: Production, Supply, and Distribution (PS&D)

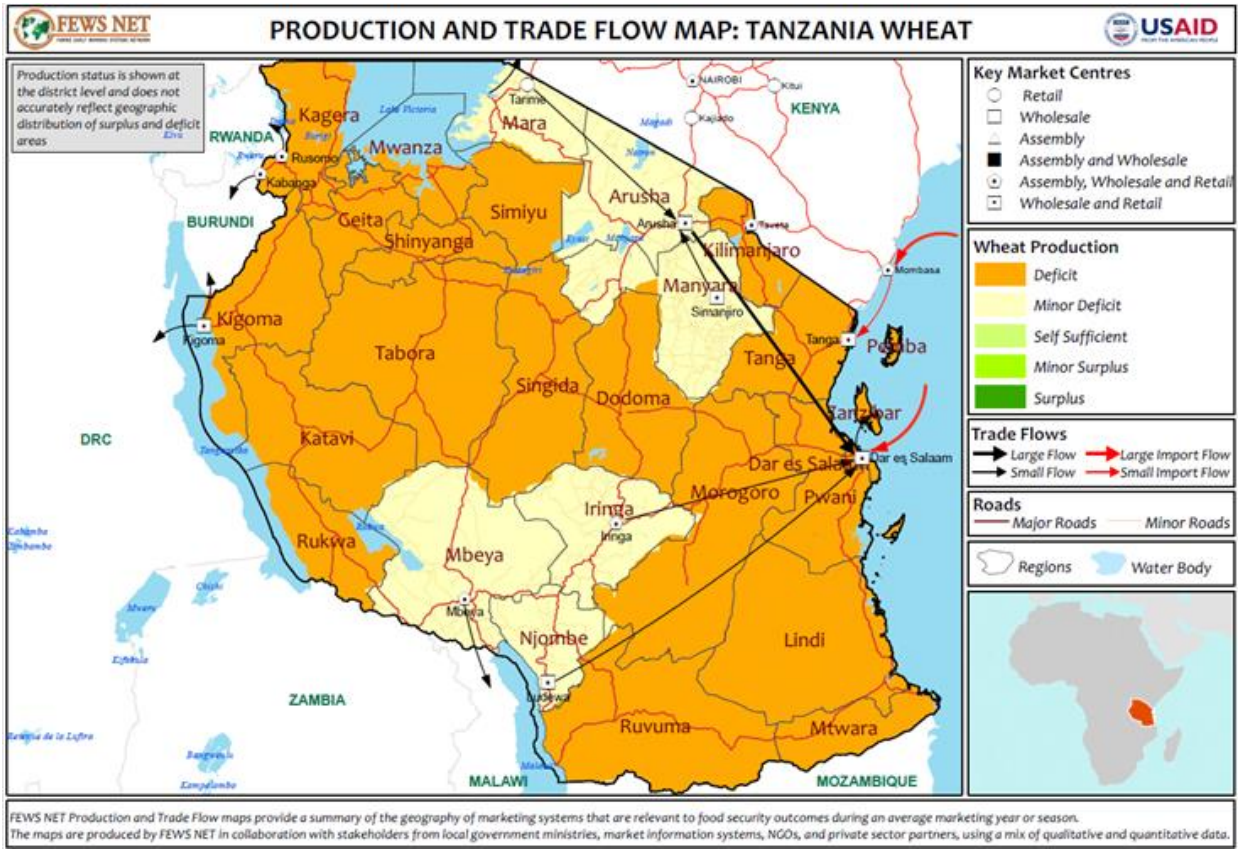
Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	60	55	60	55	0	70
Beginning Stocks (1000 MT)	143	143	209	157	0	155
Production (1000 MT)	75	73	75	73	0	80
MY Imports (1000 MT)	1241	1241	1250	1300	0	1500
TY Imports (1000 MT)	1241	1241	1250	1300	0	1500
TY Imp. from U.S. (1000 MT)	49	49	0	0	0	0
Total Supply (1000 MT)	1459	1457	1534	1530	0	1735
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	0	0	0	0	0	0
FSI Consumption (1000 MT)	1250	1300	1300	1375	0	1500
Total Consumption (1000 MT)	1250	1300	1300	1375	0	1500
Ending Stocks (1000 MT)	209	157	234	155	0	235
Total Distribution (1000 MT)	1459	1457	1534	1530	0	1735
Yield (MT/HA)	1.25	1.3273	1.25	1.3273	0	1.1429
(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 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Post forecasts Tanzania's wheat production to increase by approximately 10 percent year-on-year, reaching 80,000 metric tons, up from 73,000 MT in MY 2024/25. This projected growth is attributed to several government initiatives aimed at enhancing wheat production in the Southern Highlands. Despite significant government efforts to enhance wheat production, challenges such as high post-harvest losses, the prevalence of pests and diseases—most notably wheat stem rust caused by *Puccinia graminis*—and the limited availability of high-yielding wheat varieties continue to hinder progress. The primary wheat varieties cultivated in Tanzania include Sifa, Juhudi, and Synergy. Majority of farmers are using uncertified farmer's served seeds. Key government initiatives to address these challenges involve providing free wheat seeds to small-scale farmers, improving access to subsidized fertilizers, promoting block farming practices, and supporting wheat marketing through measures such as free transportation from villages to towns. Additionally, heightened demand and attractive prices offered by local buyers further incentivize wheat production.

Post forecasts area harvested to increase by 27 percent year-on-year, reaching 70,000 hectares in MY 2025/26 from 55,000 hectares in MY 2024/25 as farmers are shifting from growing other crops, such as potatoes, to wheat due to favorable prices and government support. Wheat production in Tanzania is concentrated in the regions of Arusha, Manyara, and Kilimanjaro (near the Kenya-Tanzania border), as well as Mbeya, Iringa, Njombe, and Rukwa (along the Tanzania-Zambia Highway and near the Malawi and Zambia borders).

Figure 6: Wheat Growing Regions in Tanzania



Source: FEWS NET

Consumption

Post forecasts a 9.1 percent rise in food, seed, and industrial (FSI) consumption for marketing year 2025/26, reaching 1.5 million metric tons from 1.375 million MT in MY 2024/25. The increase is driven by a low supply of corn, rising incomes, urbanization, dietary shifts towards wheat consumption, convenience of wheat products, and population growth, and growing demand for wheat products in urban areas among middle and upper-income consumers.

Tanzania has experienced consistent economic growth in recent years, with its GDP projected to expand by six percent in 2025. This growth has marked the country's transition from a low-income to a lower-middle-income economy. Consequently, there has been a notable emergence of a growing middle- and upper-income consumer demographic, driven by rising per capita incomes, increased financial inclusion, and enhanced market opportunities. According to the Tanzania National Bureau of Statistics (NBS), the per capita disposable income in Tanzania is projected to grow at an annual rate of 8.6 percent from 2023 to 2028.

The growth rate of middle and upper-income consumers in Tanzania has been particularly noteworthy. Presently, the middle-class population is estimated to be approximately 1.5 million individuals. The current annual population growth rate in Tanzania is approximately 2.89 percent. The country's population is currently estimated to be around 71.4 million individuals. This sustained growth rate is largely attributable to the nation's high fertility rate and predominantly youthful demographic

composition. The convenience of wheat products and Tanzania's growing population lead to an overall increase in food demand, including wheat products.

The tourism and hospitality sectors in Tanzania play a crucial role in driving the increasing demand for wheat. In 2024, the industry demonstrated significant growth, with tourist arrivals rising to approximately 1.8 million from 1.5 million in 2022, thus fueling the demand for wheat-based products, particularly in hotels and restaurants catering to both domestic and international guests. Looking to the future, the sector is projected to maintain its upward trajectory, with Tanzania aiming to attract over five million tourists in 2025, further emphasizing the industry's integral contribution to the national economy and its influence on related sectors. The expansion of the hotel and restaurant industry, with a 12 percent increase in registered hotels in 2023, further drives this demand. Diverse culinary offerings cater to both local and international tourists.

The government of Tanzania plans to launch soon construction of a wheat mill in Makete district, Njombe Region as an initiative to boost wheat production in the Southern Highlands and increase the consumption of locally grown wheat in Tanzania.

Feed and residual are negligible in Tanzania because feed millers and farmers use corn as the major source of carbohydrates for animal feed.

Trade

Post projects a 15.4 percent increase in wheat imports for MY 2025/26, reaching 1.5 million MT to meet rising domestic demand, with Tanzania sourcing over 90 percent of its wheat from international markets. Key factors influencing the wheat market include global prices, proximity to export markets, and geopolitical relationships, with competitive prices and favorable ties making imports feasible. The government of Tanzania has an import restriction on wheat importation that requires millers to buy locally before obtaining import permits.

Table 8: Major Wheat Exporters to Tanzania, Calendar Year, MT

Country	2020	2021	2022	2023	2024
Russia	700,911	377,123	*213,000***	*816,000***	*984,000***
EU 27	216,402	5,624	229,482	226,250	205,465
Argentina	0	66,112	81,900	0	81,267
United States	0	0	0	65,500	48,600
Canada	33,425	29,499	36,300	53,459	43,499
Turkey	45,522	44,985	41,083	68,225	28,102
Uruguay	0	0	0	0	12,524
Australia	903	200,867	108,198	1,046	1,184
Ukraine	46,630	113,595	49,251	0	0
Others	417	1,254	48,012	1,594	356

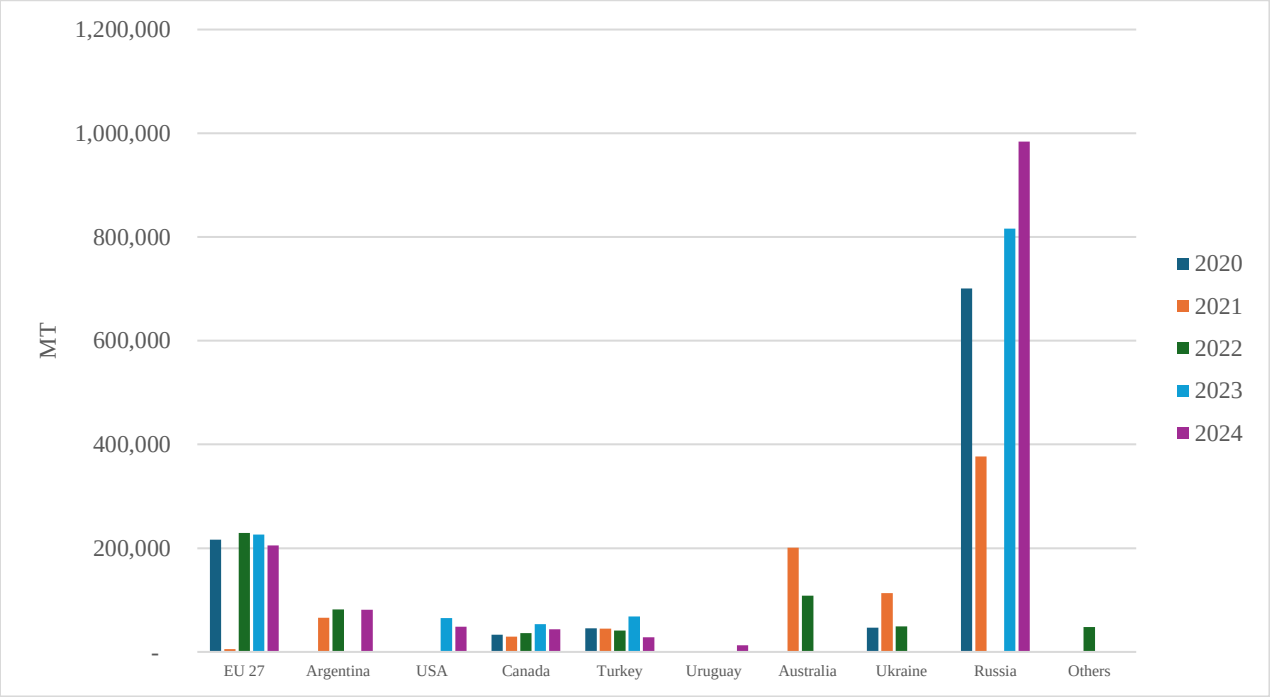
Source: Trade Data Monitor and Private Sources

**Post estimates based on private source data

FAS Dar es Salaam is revising up Tanzania wheat imports in MY 2024/25 to 1.3 million metric tons based on strong shipments to date and robust demand. Russia has historically been Tanzania's predominant supplier of wheat, contributing more than 50 percent of the nation's wheat imports. Russian export data has been unavailable since 2021; however, private source port loading data suggests that Russia remains the dominant supplier of wheat to Tanzania. In MY 2024/25 Russia had already shipped

approximately 774,000 MT of wheat to Tanzania by February, putting it on pace to be a record year for Russian exports. Indeed, CY 2024 was a record for Russian wheat shipments to Tanzania at an estimated 984,000 metric tons.

Figure 7: Wheat Imports Trends in Tanzania CY 2020-2024 (MT)



Source: Trade Data Monitor and Private Sources
Note: 2022 Russian import data not available

The East African Community customs union's common external tariff (CET) for wheat is set at 35 percent ad valorem. However, starting in June 2024, Tanzania was allowed to waive its application for one year and has instead imposed a 10 percent tariff to promote wheat imports. These measures collectively drive Tanzania's wheat import strategy to meet growing demand.

Wheat prices in Tanzania are primarily determined by global prices due to the country's reliance on imports. In 2024, prices averaged $313 (USD) per MT, down from $490 per MT in 2023. This decrease is partly attributed to a 33 percent decline in Russian wheat prices. Additionally, the cost of wheat flour in Tanzania varies based on transportation expenses from Dar es Salaam, where all mills are located.

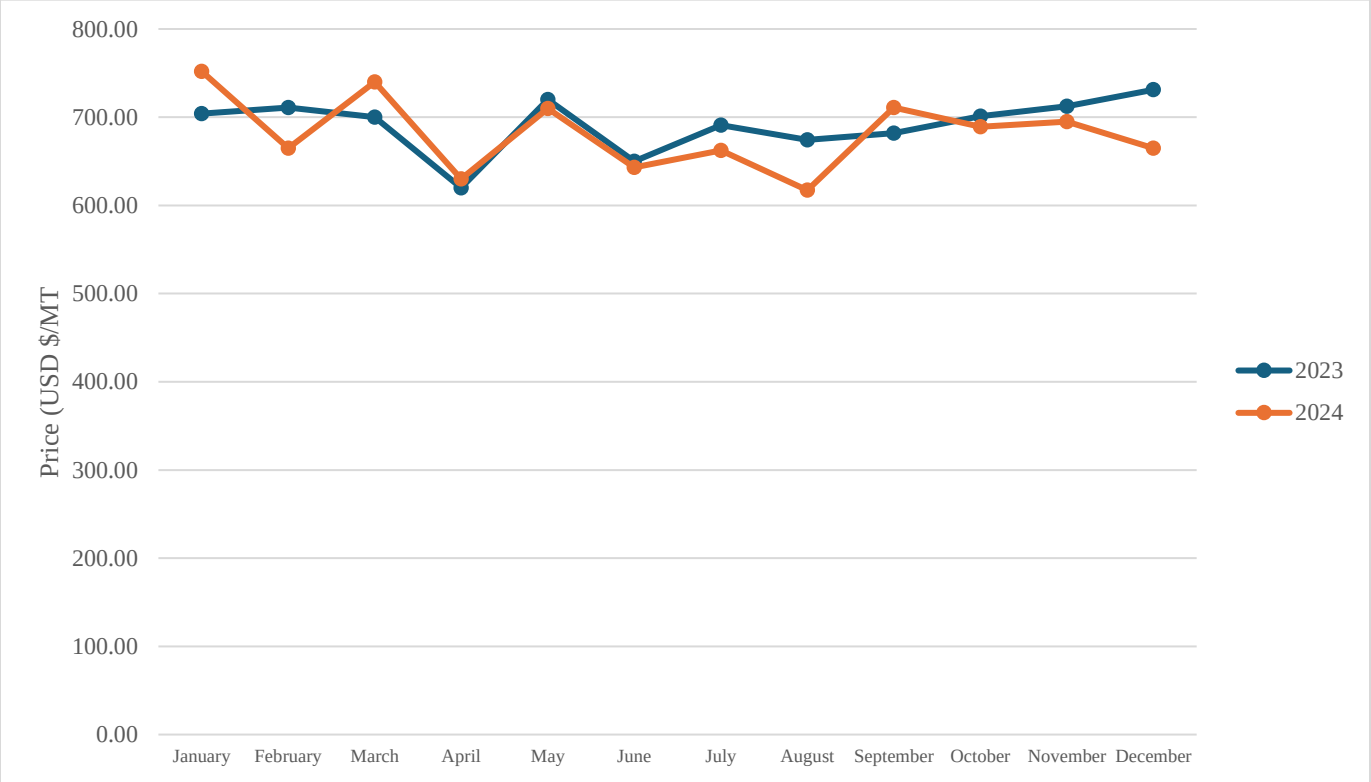
Table 9: Average Wheat Flour Price in Tanzania, January to December, (Prices in USD $/MT)

	2023	**2024**
January	704.00	752.00
February	711.00	665.00
March	700.00	740.00
April	620.00	630.00
May	720.00	710.00
June	650.00	643.00
July	691.00	662.30
August	674.20	617.20

September	682.00	711.00
October	701.00	689.00
November	712.30	695.00
December	731.10	665.00

Source: Bank of Tanzania, Ministry of Industry and Trade

Figure 9: Trends of Wheat Flour Prices in Tanzania (USD $/MT)



Source: Bank of Tanzania, Ministry of Industry and Trade.

Stocks

Post projects that ending stocks of wheat for marketing year (MY) 2025/26 will rise to 235,000 metric tons from 155,000 metric tons in MY 2024/25, mainly due to increased import supplies. In Tanzania, wheat stocks are held by traders and millers in stores and warehouses, ensuring a steady supply to meet domestic demand. Despite the rise in import supplies, storage capacity remains unchanged. According to sources, some of the imported wheat intended for Tanzania has been redirected to neighboring countries where Tanzanian wheat millers maintain operations.

Rice

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

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	May 2023		May 2024		May 2025	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1100	1100	1125	1125	0	1130
Beginning Stocks (1000 MT)	0	0	0	0	0	5
Milled Production (1000 MT)	2450	2450	2515	2515	0	2510
Rough Production (1000 MT)	3712	3712	3811	3811	0	3803
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600	0	6600
MY Imports (1000 MT)	280	280	125	125	0	170
TY Imports (1000 MT)	105	105	150	150	0	170
TY Imp. from U.S. (1000 MT)	1	1	0	0	0	0
Total Supply (1000 MT)	2730	2730	2640	2640	0	2685
MY Exports (1000 MT)	120	120	125	100	0	50
TY Exports (1000 MT)	125	125	125	100	0	50
Consumption and Residual (1000 MT)	2610	2610	2515	2535	0	2620
Ending Stocks (1000 MT)	0	0	0	5	0	15
Total Distribution (1000 MT)	2730	2730	2640	2640	0	2685
Yield (Rough) (MT/HA)	3.3745	3.3745	3.3876	3.3876	0	3.3655

(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 2025/2026 = January 2026 - December 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Production

Post forecasts a minor decline in milled production for MY 2025/26 by approximately 0.2 percent, reaching 2.51 million MT compared to 2.515 million MT in MY 2024/25. This reduction is primarily due to delayed fertilizer application, pest infestations, and diseases such as bacterial leaf blight, which causes wilting and yellowing of leaves. The disease first appeared in 2022, and efforts to contain it have not been successful.

Post anticipates a slight increase in the harvested area by 0.44 percent to 1.13 million hectares year-on-year. Various local sources report that many farmers are switching from corn to rice during the planting season because of more favorable rice prices. This trend is driven by a *de facto* import ban imposed by the Tanzanian government, which restricts rice import permits to times of deficit, specifically to address shortfalls. The government aims to expand rice farming to at least 2.2 million hectares by 2030, but progress has been slow due to limited access to water sources.

MY 2025/26 post forecasts decrease in yields by approximately 13.2 percent to 3.3655 MT/HA from 3.3876 MT/HA in MY 2024/25. Farmers experienced delays of three weeks in planting and over a month in fertilizer application, impacting overall yields.

Consumption

Post forecast MY 2025/26 approximately 3.4 percent increase in consumption and residual, reaching approximately 2.62 million MT, up from 2.535 million MT in MY 2024/25. This rise is primarily driven by population growth and the establishment of new hotels and restaurants in major cities such as Dar es

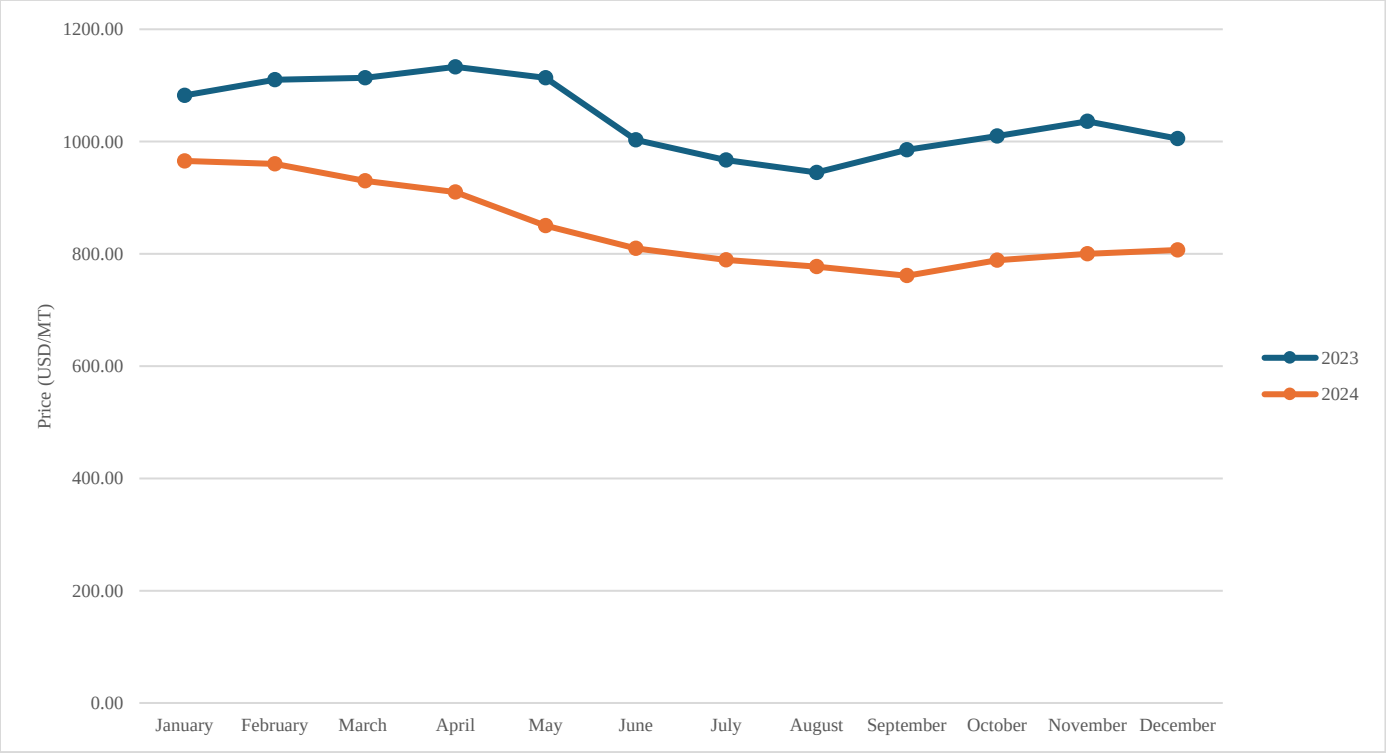
Salaam, Mwanza, Arusha, and Mbeya. Dar es Salaam, accounting for over 60 percent of the nation's consumption, is Tanzania's largest city. Though most of the population reside in rural areas, the urbanization rate has steadily increased from 28 percent in 2010 to 37 percent in 2023. Urban consumers increasingly perceive rice as a convenient staple food that cooks quickly and requires less energy compared to corn. Contributing factors include the rapid urbanization leading to a growing middle class with higher disposable incomes, the versatility and ease of preparation of rice, the aromatic attributes of certain rice varieties, and the government's efforts to improve the quality and availability of locally produced rice.

Table 11: National Average Wholesale Prices of Rice in Tanzania (USD/MT)

	2023	2024
January	1082.00	965.50
February	1110.00	960.30
March	1113.30	930.00
April	1133.10	910.00
May	1113.50	850.00
June	1002.70	810.00
July	967.00	789.00
August	945.00	777.30
September	985.50	761.00
October	1010.00	788.60
November	1036.00	800.00
December	1005.00	807.00

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

Figure 10: National Average Wholesale Prices of Rice in Tanzania (USD/MT)



Source: Bank of Tanzania, Ministry of Industry and Trade

Trade

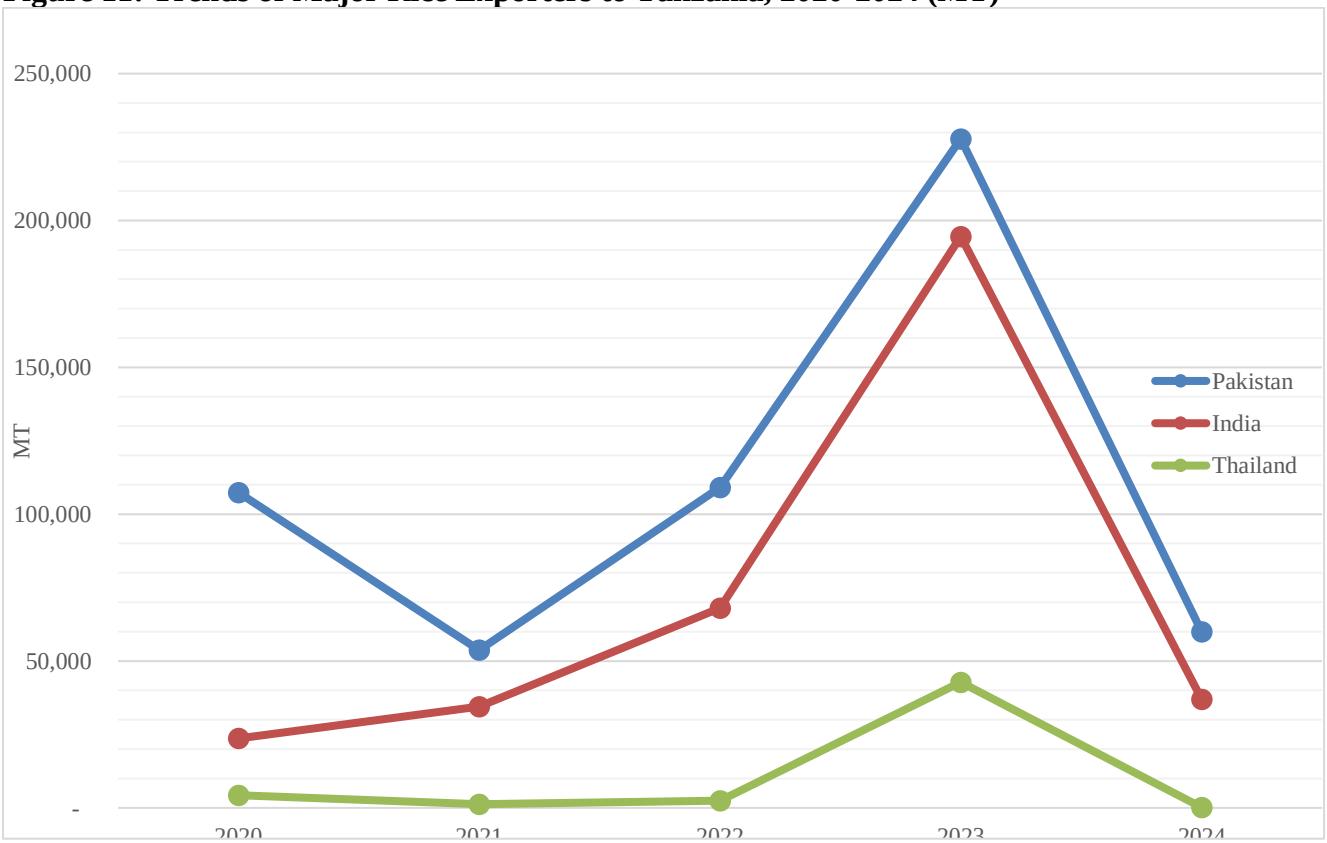
Post Dar es Salaam anticipates a measured increase in MY 2025/26 imports, rising to 170,000 metric tons from 125,000 metric tons in MY 2024/25, primarily driven by insufficient domestic production. The Government of Tanzania (GoT) administers rice imports through a quota system, granting import permits exclusively when domestic supply proves inadequate, thereby ensuring the prioritization of local production.

Table 12: Rice Exporters to Tanzania, Calendar Year (MT)

Country	2020	2021	2022	2023	2024
Pakistan	107,327	53,727	109,152	227,815	60,000
India	23,646	34,525	68,064	194,577	37,000
Thailand	4,280	1,254	2,469	42,788	155
United States	10	21	0	830	860
Kenya	0	372	70	0	148
Others	1,041	1	3	144	208

Source: Trade Data Monitor LLC

Figure 11: Trends of Major Rice Exporters to Tanzania, 2020-2024 (MT)



Source: Trade Data Monitor

Tanzania, as a member of the East African Community, follows the EAC's Common External Tariff system. The CET is designed to protect local industries within the EAC member states by imposing tariffs on goods imported from non-EAC countries. For rice imports from non-EAC countries, Tanzania imposes a tariff of 75 percent ad valorem or $345 (USD) per metric ton, whichever amount is higher. This high tariff is intended to discourage rice imports and protect domestic rice producers by making imported rice more expensive.

In addition to the tariff, the Government of Tanzania (GoT) regulates rice imports through an import quota system. This system aims to balance domestic production with necessary imports to stabilize the market. Under this system, import permits are issued to supplement domestic production when needed. Unlike wheat, for which the GoT provides a preliminary demand estimate or a blanket target to guide the issuance of permits, rice import permits are granted on an as-needed basis until the GoT determines that local demand has been met. For example, if local rice production fails to meet demand due to poor harvests or other challenges, the GoT may issue import permits to allow additional rice imports to bridge the shortfall.

In 2024, the Government of Tanzania allocated a total rice import quota of approximately 150,000 metric tons, with actual imports amounting to 140,000 metric tons. A substantial share of Tanzania's rice imports came from non-EAC countries, notably India and Pakistan.

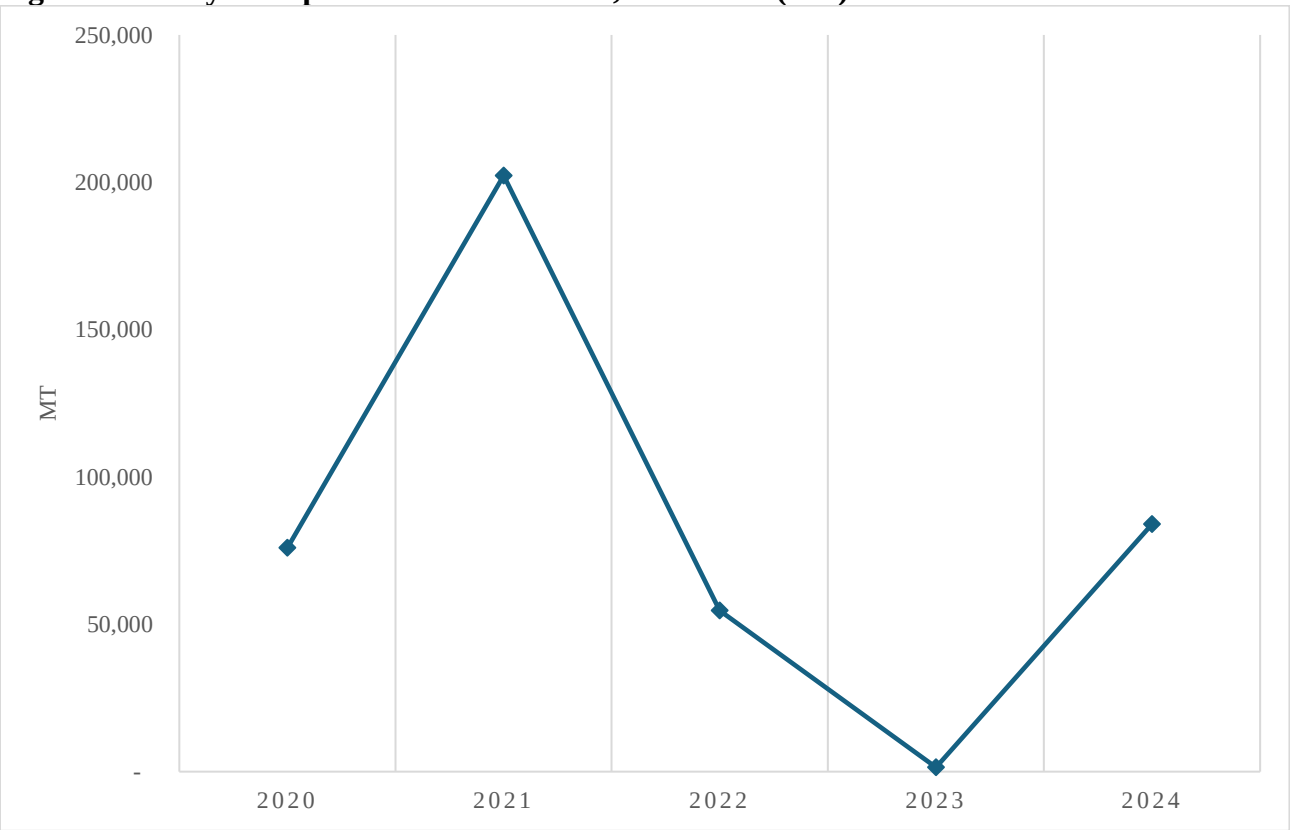
FAS Dar es Salaam forecast for MY 2025/26 projects a significant decline in exports, with a reduction of 50 percent to 50,000 metric tons year-on-year, down from 100,000 metric tons in the previous marketing year 2024/25. This decrease is primarily attributed to the stringent bureaucratic export procedures implemented by the Government of Tanzania since 2023. Additionally, high domestic demand has incentivized sales within the domestic market, further contributing to the reduction in exports. For more detailed information, please refer to the Trade section under corn.

Table 13: Major Buyers of Tanzania Rice, Calendar Year, (MT)

Country	2020	2021	2022	2023	2024
Kenya	75,972	202,278	54,614	1,461	84,002
Zambia	674	258	30	54	2,431
Cote d'Ivoire	0	0	0	0	1,986
Ethiopia	0	0	0	0	826
EU 27	0	0	0	0	350
Zimbabwe	37	99	15	0	330
USA	0	20	7	0	24
Others	9	147	30	7	27

Source: Trade Data Monitor LLC

Figure 12: Kenyan Imports of Tanzania Rice, 2020-2024 (MT)



Source: Trade Data Monitor

Stocks

Post estimates indicate that ending stocks for MY 2025/26 will increase by 200 percent, reaching 15,000 metric tons, down from 5,000 metric tons in MY 2024/25. Rice stocks are held by various stakeholders, including large-scale farmers, cooperative warehouses, traders, millers, and the government. This significant decrease in ending stocks is attributed to higher domestic consumption, reduced yields due to untimely application of fertilizer, pest infestations, and diseases such as bacterial leaf blight. The shift of farmers from corn to rice, influenced by favorable rice prices and government policies has contributed to changes in stock levels. Additionally, the government's import quota system and stringent bureaucratic export procedures have impacted the availability and distribution of rice stocks within the country.

Attachments:

No Attachments