Required Report: Required - Public Distribution

Date: March 18, 2026

Report Number: TZ2026-0002

Report Name: Grain and Feed Annual

Country: Tanzania

Post: Dar Es Salaam

Report Category: Grain and Feed

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Report Highlights:

FAS Dar es Salaam projects a tighter grains market in marketing year (MY) 2026/27, with corn production expected to fall by three percent due to delayed and uneven rainfall and disruptions to subsidized input delivery following post-election government crackdowns on opposition groups in late 2025. Wheat imports are forecast to rise by 3.3 percent, supported by higher incomes, shifting diets, and growing demand from the tourism sector. Rice imports are projected to surge by approximately 18.2 percent as domestic production continues to lag behind national consumption needs, widening the supply gap and increasing reliance on foreign suppliers.

Corn

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

Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4100	4100	4000	4000	0	3990
Beginning Stocks (1000 MT)	1401	1401	1431	1431	0	961
Production (1000 MT)	8500	8500	7000	7500	0	7300
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)	9931	9931	8461	8961	0	8291
MY Exports (1000 MT)	1200	1200	800	1000	0	800
TY Exports (1000 MT)	1100	1100	800	1000	0	800
Feed and Residual (1000 MT)	1200	1200	900	1000	0	1100
FSI Consumption (1000 MT)	6100	6100	6100	6000	0	6200
Total Consumption (1000 MT)	7300	7300	7000	7000	0	7300
Ending Stocks (1000 MT)	1431	1431	661	961	0	191
Total Distribution (1000 MT)	9931	9931	8461	8961	0	8291
Yield (MT/HA)	2.0732	2.0732	1.75	1.875	0	1.8296
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Tanzania's corn production for the 2026/27 marketing year is projected to fall by about three percent to 7.3 million metric tons (MT), largely due to delayed and uneven rainfall during the October–December 2025 period. The MY 2026/27 estimate reflects output from unimodal crops planted in November 2025 and harvested in July 2026, as well as bimodal crops planted in November 2026 and harvested in February 2027.

Unimodal regions, where corn is planted only once per year, include the Southern Highlands and Central areas. In these areas rains typically span October through early April, but in 2025 they began late in mid-November and were followed by prolonged dry spells from December to mid-January. Harvests in these areas run from July to early September, and this production feeds into the 2026/27 forecast.

Meanwhile, bimodal zones, where corn is harvested twice per year - covering the Northern, Lake, Eastern, Southern, and parts of Western regions - receive rainfall from November to December and again from March to May. The crop produced from the Nov-Dec rains is harvested in February and contributes to MY 2025/26. The crop produced from the March-May rains is harvested from July to September and contributes to the 2026/27 marketing year.

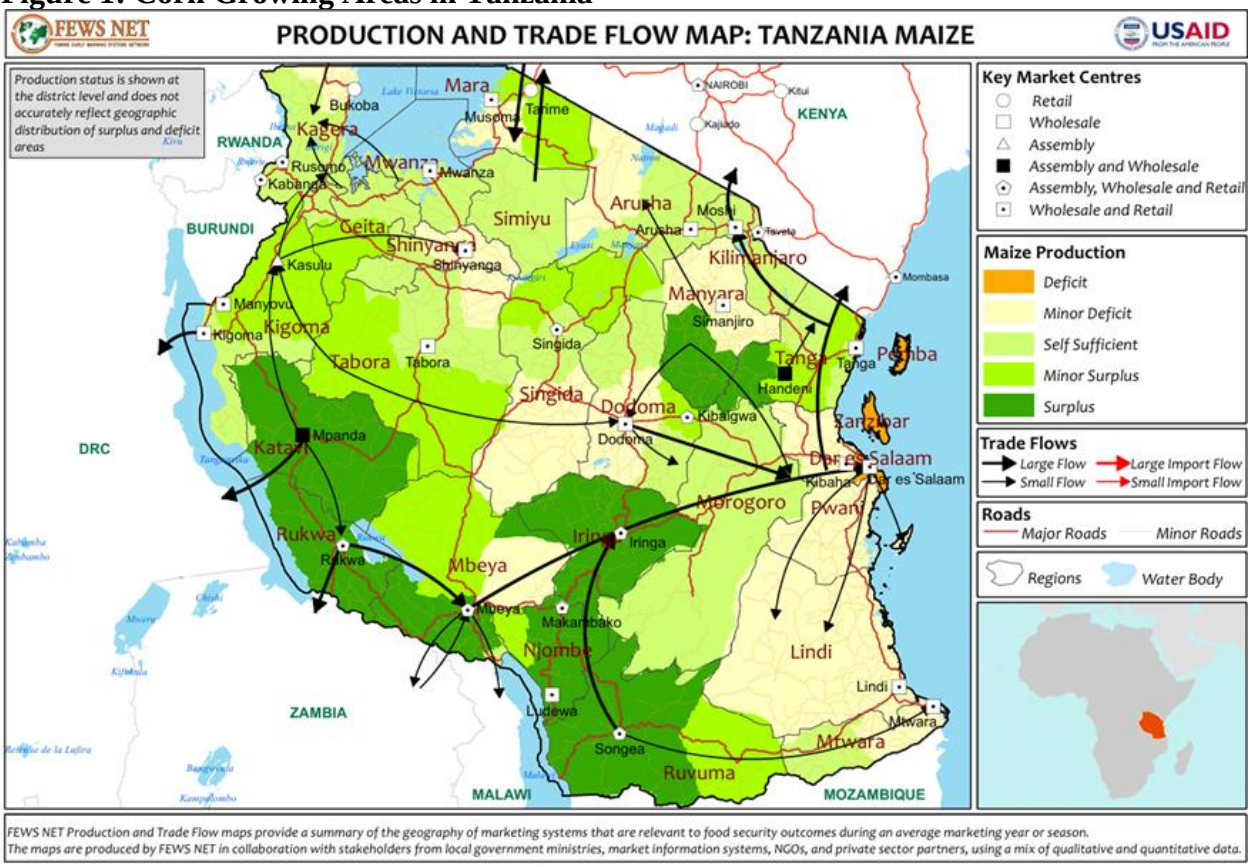
Harvested area is projected to edge down by about 0.25 percent to 3.99 million hectares. This slight reduction is driven by smallholder farmers in the southern highlands who cut corn at the tasseling stage and sell the plants as fodder at higher prices. Yields are projected to fall to 1.83 metric tons per hectare in part because of the early cutting, but also because of erratic early rains and delayed fertilizer delivery.

As of November 2025, subsidized fertilizer prices ranged from $23 to $28 per 50-kilogram bag, with costs varying by distance from the port of Dar es Salaam. Tanzania imports nearly 95 percent of its fertilizer, making the sector heavily dependent on smooth port operations. The lockdown and curfew that followed the October elections disrupted port operations and delayed fertilizer deliveries by several weeks. These delays meant that most farmers planted without fertilizer. When fertilizer eventually arrived—often in early December—farmers were forced to apply planting and top-dressing fertilizer simultaneously, reducing nutrient-use efficiency and increasing the risk of fertilizer burn. Cashflow constrains further limited purchases. The disruptions also created uncertainty for agro-dealers, increased transport costs, and resulted in partial deliveries to remote areas, exacerbating regional disparities in access and affordability.

Tanzania's main corn-producing belt spans elevations of roughly 500 to 1,500 meters above sea level, where moderate temperatures and relatively reliable rainfall create favorable growing conditions for the country's leading staple crop. Production is concentrated in a few dominant regions: the Southern Highlands contributes about 26 percent of national output, followed closely by the Lakes Region at 25 percent. The Eastern Region accounts for around 13 percent, the Northern Region 12 percent, the Western Region 10 percent, the Southern Region 8 percent, and the Central Region roughly 6 percent.

These regional differences reflect a combination of ecological, economic, and demographic factors. The Southern Highlands benefit from fertile volcanic soils, cooler temperatures, and stronger agro-dealer networks, while the Lakes Region relies on relatively consistent rainfall patterns. In contrast, the Central and Southern zones face higher drought risk, weaker infrastructure, and limited access to inputs, all of which constrain productivity. Population pressure in the Northern and Eastern regions has reduced average farm sizes, limiting expansion and intensification. Together, these dynamics shape the geography of corn production and play a central role in determining Tanzania's broader food security outlook.

Figure 1: Corn Growing Areas in Tanzania



Source: FEWS NET

Changes to MY 2025/26

Post is raising its MY 2025/26 corn production estimate to 7.5 million metric tons, reflecting the positive impact of timely and well distributed rainfall throughout the growing season. Despite improved weather patterns, yields are projected to decline slightly compared to MY 2024/25 - by about 0.2 MT per hectare (ha) to 1.875 MT per hectare. Yields are decreased because farmers are cutting corn for animal feed before maturity.

Table 2: Monthly Rainfall (mm) from Corn Growing Regions

Year	Month	Northen	Eastern	Southern	Highlands	Central	Western	Lakes
2024	Jan	520.4	2245.6	909.3	1243.5	414.3	581.2	691.1
	Feb	171.3	798.8	231.2	993.5	271.2	477	502.9
	Mar	545.9	1497.7	499.4	677.8	156.5	584.5	619.6
	Apr	841.4	1861.5	663.7	406.4	142.7	490.5	981.4
	May	206.8	313	551.5	5.3	2.1	5.1	398.7
	Jun	132.5	143	21.6	0.1	0.9	0	26.7
	Jul	22.3	15.4	19.5	0	0	0	47.2
	Aug	76	59.7	8.6	0	0	2.2	102.5
	Sep	84.2	38.9	7	0	0	0.5	122
	Oct	144.8	254.3	22.9	188.3	34.4	215.9	251.3
	Nov	248.6	306.4	34.8	204.7	181.2	416.9	604.6
	Dec	668.3	1107.8	126.1	638.2	464.4	460.7	660.7
	Total	3662.5	8642.1	3095.6	4357.8	1667.7	3234.5	5008.7
2025	Jan	182	520.7	178.5	862.4	283	466.7	393
	Feb	42.3	373.6	507.2	587.9	140.6	364.3	70.3
	Mar	462.7	1292.3	544.6	970.4	248.8	452.9	1106.4
	Apr	765.1	1458.7	433.9	343.2	41.1	288.2	722.7
	May	296.4	614.5	114.7	181.7	3.7	245.3	890.6
	Jun	157.9	215	87.2	4.6	0	13	163.6
	Jul	29.1	13.3	7.3	0	0	0	53.4
	Aug	23.9	72.8	0.4	0	0	0	216.8
	Sep	10.7	25	51.8	0.6	0	9.3	151.3
	Oct	15	30	60	10	10	15	200
	Nov	10	50	50	150	50	50	250
	Dec	10	100	100	250	100	150	400
	Total	2005.1	2328	1925.6	3360.8	717.2	961.2	4618.1

Source: Tanzania National Bureau of Statistics

Rainfall patterns show a clear decline from 2024 to 2025, with most regions receiving 40-70 percent less rain in 2025. The Eastern region, exceptionally wet in 2024, saw a sharp drop the following year, while Highlands and Lakes remained the most stable. Overall, 2024 was markedly wetter, especially early in the year, whereas 2025 reflects a much drier pattern.

Consumption

MY 2026/27 food, seed, and industrial (FSI) corn consumption is projected to rise by about 3.3 percent, increasing from 6 million metric tons to roughly 6.2 million metric tons. This growth is driven not only by population growth, but also by steady demand from the food processing sector, rising urbanization, and continued use of corn for seed and small-scale industrial applications. With production expected to decline, Post anticipates that this upward pressure on consumption will strain domestic supplies and reduce exports. The resulting imbalance is likely to contribute to localized food shortages, higher market prices, and increased food insecurity, particularly among low-income households that are most vulnerable to rising staple food costs.

Feed and residual corn use is expected to rise by roughly ten percent, reaching about 1.1 million metric tons, driven by expanding demand from poultry, aquaculture, and livestock producers that are steadily

increasing their operations. A notable share of this growth stems from a newly established modern poultry complex in Zanzibar, which depends on a reliable supply of feed-grade maize to support its broiler and layer units. The facility's upgraded housing systems, enhanced biosecurity, and on-site feed formulation have created a consistent and commercially significant source of demand.

Rapid urbanization is boosting consumption of affordable animal protein, prompting commercial poultry and fish farms to scale up, while feed manufacturers expand capacity and refine maize-based formulations. Growing investment in small- and medium-scale livestock enterprises is also accelerating the shift from traditional grazing to more intensive production systems, further increasing feed requirements and solidifying maize's central role in Tanzania's livestock and aquaculture industries.

Corn prices in MY 2026/27 are expected to remain relatively high, following sharp increases in 2023, a correction in 2024, and stabilization around $310-$330/MT in 2025 (Table 3). The supply shortfall in MY 2026/27 could renew upward price pressure.

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

Month	2022	2023	2024	2025
Jan	294.2	495.8	330	315.9
Feb	270.1	490.9	326.8	310.6
March	263.4	510.3	275.4	320.6
April	275.4	463.4	252.3	312.8
May	308.2	444.3	238.6	312.5
June	343.9	428.3	235.5	314.1
July	379.5	415.2	240.3	316.4
Aug	386.3	392	242.8	315.8
Sept	411.2	360	244.8	321.3
Oct	441.1	355.5	256.4	318.6
Nov	449	351.5	269.1	325.3
Dec	482.6	348	295.3	330

Source: FAO: Food Price Monitoring and Analysis (FPMA)

Changes to MY 2025/26

Post revises MY 2025/26 food, seed, and industrial (FSI) consumption downward to six million metric tons, reflecting the impact of reduced domestic production and rising market prices—both of which are tightening overall availability and discouraging use. Feed demand, however, is revised upward to one million metric tons, driven by the opening of new commercial poultry farms and increased livestock-sector consumption.

Trade

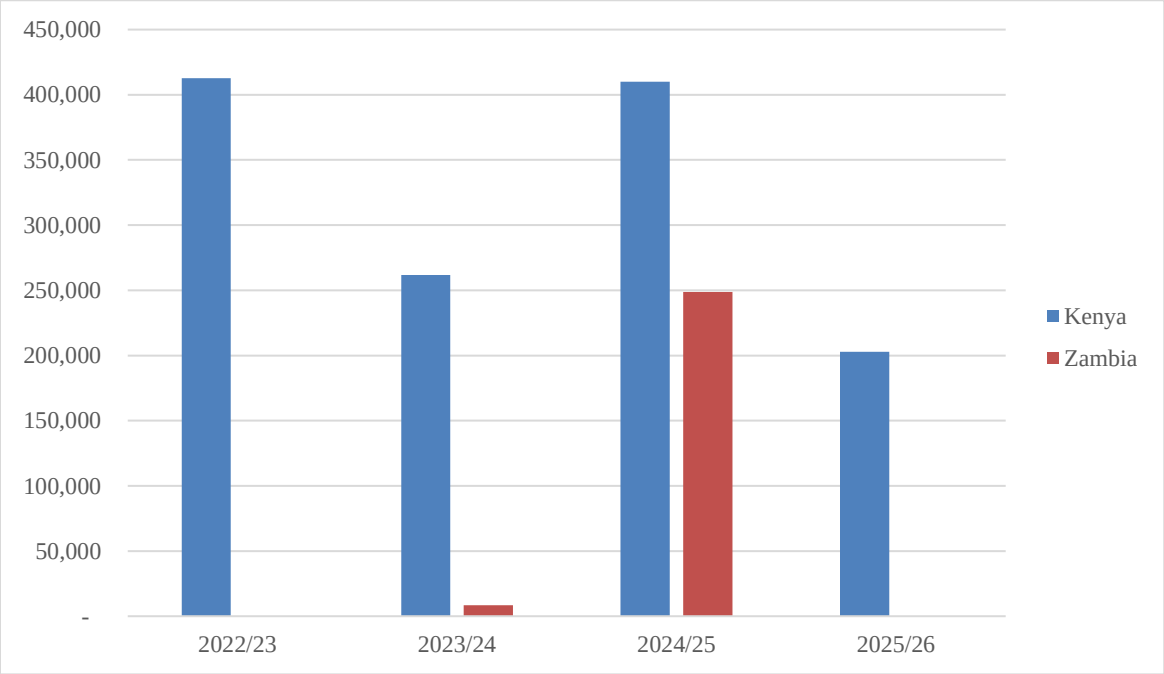
Post expects corn exports in MY 2026/27 to decline by 20 percent year-on-year, falling to 800,000 metric tons. This reduction reflects lower domestic production caused by delayed and uneven rainfall which has constrained exportable surpluses.

Exporters face increasingly restrictive and delayed permit procedures. Digitization through the Tanzania Electronic Single Window (TANESW) has not closed enforcement gaps, with permits still being issued to individuals without grain and resold on an informal market. Foreign buyers are still barred from purchasing directly from farmers, forcing reliance on intermediaries. These persistent irregularities raise costs, create uncertainty, and widen the gap between policy design and implementation. As a result, Tanzania's corn exports to Kenya remain below expectations despite severe Kenyan drought, as slow

permitting and buyer restrictions increase transaction costs, weaken farm-gate prices, and reduce smallholder incomes and food security.

Tanzania's borders are highly porous. Despite the officially reported export figures, illicit cross-border movement of corn remains significantly high between Tanzania and neighboring countries like Zambia and Kenya. This challenge is driven by several factors, including limited enforcement capacity at border points, long-standing informal trade routes used by communities along the frontier, and strong price differentials in the region that incentivize traders and farmers to move grain informally. Many border areas also lack adequate surveillance infrastructure, making it difficult to monitor commodity flows, particularly in remote locations. These dynamics often lead to seasonal spikes in unrecorded exports during harvest periods.

Figure 2: Trends of Tanzania Corn Exports (MT)



Source: Trade Data Monitor, LLC

For MY 2026/27, Tanzania's corn imports are anticipated to remain steady at around 30,000 metric tons, sourced predominantly from Zambia, Kenya, and Mozambique. These inflows consist largely of seed corn rather than grain for consumption. Import volumes are expected to stay modest due to Tanzania's generally sufficient domestic production, limited demand for feed-grade corn, and ongoing government efforts to promote local seed multiplication. However, periodic shortfalls in specific regions, variability in seasonal rainfall, and the need for improved seed varieties continue to drive a consistent level of seed corn imports. In addition, logistical efficiencies and established trade corridors with neighboring countries help maintain stable import flow despite broader market fluctuations.

Table 4: Tanzania Corn Imports, 2021-2025 (MT)

Reporter	2021	2022	2023	2024	2025
South Africa	763	1111	235	404	1389
Brazil	0	4	389	0	85
Kenya	4137	484	37	530	0
Zambia	11333	33945	23149	13827	0
Others	207	0	494	610	1

Source: Trade Data Monitor, LLC

Tanzania's corn imports have become increasingly volatile in recent years. Zambia's shipments peaked in 2022 before dropping to zero by 2025. Kenya and South Africa have remained stable suppliers, but at lower levels.

Tanzania applies a 25 percent import duty on the cost, insurance, and freight (CIF) value of corn imported from non–East African Community (EAC) countries, along with an 18 percent Value Added Tax (VAT). Additional charges include a 0.6 percent customs processing fee on the free on board (FOB) value, a 1.5 percent railway development levy on the CIF value, and a 1.6 percent wharfage fee on the CIF value for all port-related services. Depending on the nature of the cargo, other fees—such as handling, removal, corridor levy, transfer, stripping, storage, and movement charges—may also apply. As a member of the EAC and the Southern African Development Community (SADC), Tanzania benefits from duty-free trade within the EAC and adheres to a common external tariff for non-EAC imports. Intra-African trade remains significant, with corn among the region's leading export commodities.

Stocks

Ending stocks in MY 2026/27 are projected to fall nearly 80 percent to about 191,000 MT as lower production meets rising demand, reversing the steady buildup seen from 2020–2025 (Table 5). This sharp decline signals tighter market conditions, greater price volatility, reduced government buffer capacity, and mounting pressure from growing consumption.

Changes to MY 2025/26
Post is revising MY 2025/26 ending stocks upward to 961,000 metric tons, reflecting the impact of reduced FSI consumption and rising market prices. Higher prices are slowing the pace of industrial use and limiting discretionary demand, contributing to greater stock retention. In addition, weaker domestic processing margins and cautious purchasing by downstream users are further reducing drawdowns. Imports have also remained fixed, adding to overall availability despite lower domestic output. As a result, ending stocks are now projected to be higher than previously anticipated.

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

Month	2020	2021	2022	2023	2024	2025
January	43,597	110,398	207,899	124,736	270,984	646,480
February	41,231	110,389	203,297	106,881	326,172	619,659
March	39,597	109,231	200,626	80,123	336,099	587,062
April	38,053	109,231	190,366	63,808	340,102	557,228
May	38,291	108,284	149,402	51,367	340,002	509,990
June	52,725	107,384	141,576	46,665	340,479	477,923
July	90,255	107,384	140,695	94,088	368,855	485,930
August	92,991	123,635	144,410	210,020	489,187	537,571
September	109,733	150,057	149,044	244,169	651,403	570,519
October	110,895	192,408	151,794	244,289	708,399	593,485
November	110,289	209,057	147,401	244,223	702,502	590,425
December	110,398	214,968	137,655	248,282	677,115	577,376

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

Wheat

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

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	55	55	65	65	0	60
Beginning Stocks (1000 MT)	186	186	170	262	0	337
Production (1000 MT)	75	75	75	75	0	65
MY Imports (1000 MT)	1284	1376	1400	1500	0	1550
TY Imports (1000 MT)	1284	1376	1400	1500	0	1550
TY Imp. from U.S. (1000 MT)	57	0	0	0	0	0
Total Supply (1000 MT)	1545	1637	1645	1837	0	1952
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)	1375	1375	1450	1500	0	1600
Total Consumption (1000 MT)	1375	1375	1450	1500	0	1600
Ending Stocks (1000 MT)	170	262	195	337	0	352
Total Distribution (1000 MT)	1545	1637	1645	1837	0	1952
Yield (MT/HA)	1.3636	1.3636	1.1538	1.1538	0	1.0833

(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 2026/2027 = July 2026 - June 2027

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

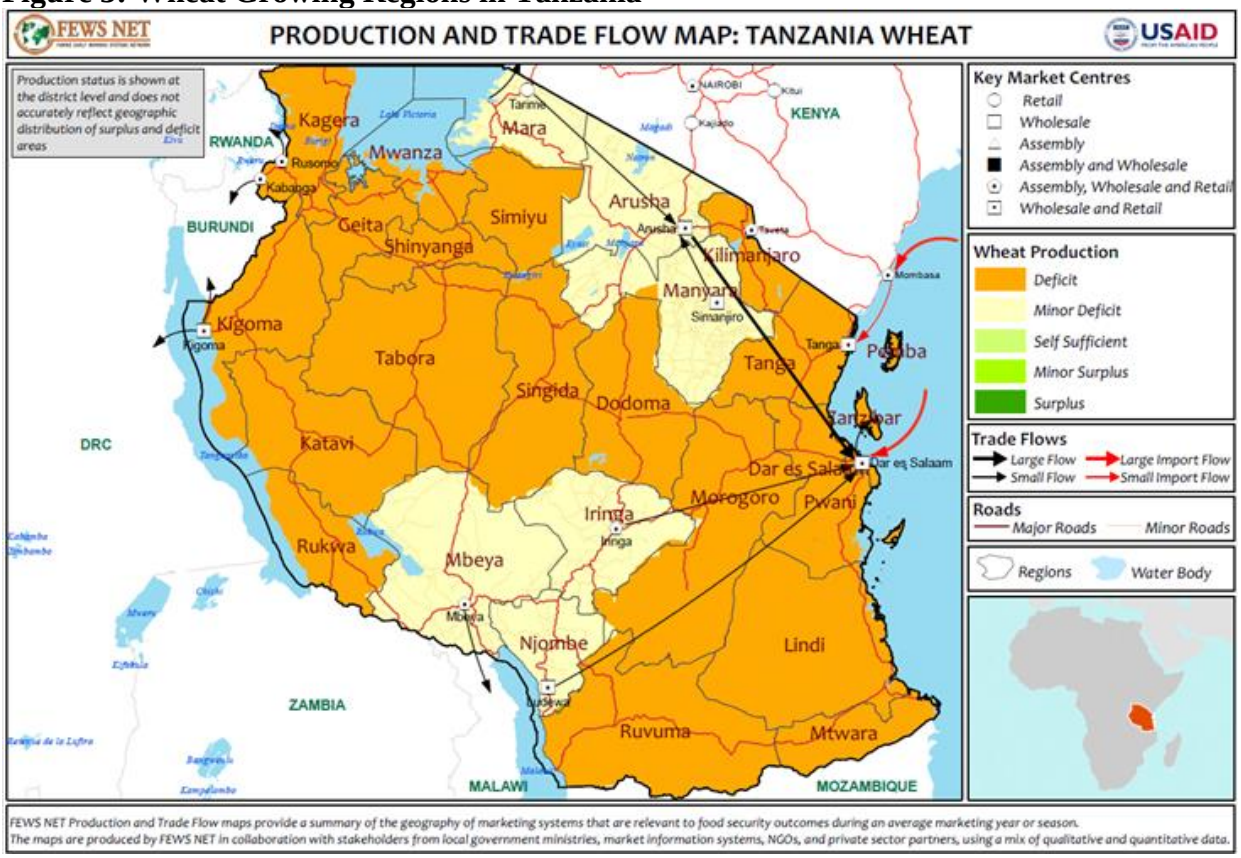
Production

Post projects Tanzania's wheat production to decline by 13.3 percent in MY 2026/27, falling from 75,000 MT to 65,000 MT, on reduced rainfall. March 2026 rains have been below average, and forecasts by the Tanzania Meteorological Agency predict continued erratic rainfall during key growing months, constraining production.

The expected production decline reflects below-average rainfall; however, structural issues also persist in the sector. Delayed fertilizer delivery, high post-harvest losses, disease pressure, and limited access to improved seed continue to plague wheat farmers. Most farmers still rely on uncertified seed, and government programs have had limited impact due to inconsistent implementation and unreliable input delivery, leaving production stagnant, despite strong demand.

Post anticipates a reduction of approximately eight percent in the area harvested, declining from 65,000 hectares in MY 2025/26 to 60,000 hectares in MY 2026/27. This contraction is driven by farmers shifting to more profitable alternatives such as potatoes and sorghum, which currently offer better market returns. Wheat cultivation in Tanzania remains concentrated in several key regions: Arusha, Manyara, and Kilimanjaro near the Kenya–Tanzania border, as well as Mbeya, Iringa, Njombe, and Rukwa along the Tanzania–Zambia corridor and close to the Malawi and Zambia borders.

Figure 3: Wheat Growing Regions in Tanzania



Source: FEWS NET

Consumption

Post projects wheat consumption in MY 2026/27 to increase by approximately seven percent, reaching 1.6 million metric tons from 1.5 million MT in MY 2025/26. This growth is driven by rising household incomes, rapid urbanization, and shifting dietary preferences toward convenient wheat-based foods such as bread, pasta, noodles, and pastries.

Demand from the hospitality and food service sectors will remain a key driver in MY 2026/27 as well. Continued expansion of hotels, restaurants, cafés, and fast-food outlets—supported by strong tourism performance—will further increase the use of wheat flour and processed wheat products. As international arrivals grow and new establishments open, consumption of wheat-based foods is expected to rise accordingly.

Macroeconomic conditions in MY 2026/27 also support higher consumption. Tanzania's steady economic growth and its strengthening lower-middle-income status are expanding household incomes. Rising purchasing power and broader financial inclusion are enabling more households to incorporate a wider variety of wheat products into their diets.

Population growth reinforces this trend. With Tanzania's population exceeding 71 million and growing at nearly three percent annually, overall food demand - including for wheat products - continues to rise. Middle-class consumers, estimated at around 1.5 million individuals, are drivers of demand for wheat-based foods.

The government's plan to construct a wheat mill in Makete District, Njombe Region, is expected to support long-term consumption by increasing the availability of locally processed wheat. However, feed and residual use of wheat will remain negligible in MY 2026/27, as the livestock sector continues to rely primarily on corn as its main carbohydrate source.

Trade

Post projects a 3.3 percent increase in wheat imports in MY 2026/27, reaching 1.55 million MT to meet rising domestic demand. Tanzania continues to rely heavily on foreign suppliers, sourcing more than 90 percent of its wheat from international markets. Import volumes are influenced by global price trends, proximity to major exporting countries, and geopolitical relationships.

Although the Government of Tanzania maintains an import restriction requiring millers to purchase locally produced wheat before receiving import permits, compliance remains limited. In practice, only one major miller consistently adheres to this regulation, largely because domestic wheat production is insufficient and the available grain is often of lower quality. As a result, millers continue to depend on imports to meet processing needs and ensure consistent supply.

Table 7: Major Wheat Exporters to Tanzania, Marketing Years, MT

Country	**2023/24**	**2024/25**	**2025/26**
Russia	781,000*	735,000*	844,000**
EU 27	230,457	106,655	192,106
Canada	34,459	58,039	52,451
Turkey	32,970	22,277	20,648
Australia	1,184	286,027	396,596
Kenya	861	359	847
Egypt	1,956	1,039	1,510
Rest of World	94679	186	713
Total	**1,177,774**	**1,209,642**	**1,508,911**

Source: Trade Data Monitor and Private Sources

* Private Sources, **Post estimates based on private source

Tanzania's wheat imports from 2023-2025 became increasingly concentrated, with Russia dominating due to low prices and efficient Black Sea logistics. The EU-27 declined, Australia surged in 2025, and other suppliers maintained small, stable volumes. Overall, Russia's strong foothold limits opportunities for higher-quality exporters.

Tanzania's monthly wheat imports patterns in MY 2025/26 were heavily concentrated among a small number of major suppliers, with Russia maintaining a dominant position and delivering substantial volumes in July, September, and October. Russian shipments were highest late in the year, while Australian shipments tend to cover supply early in the year.

Table 8: Major Wheat Exporters to Tanzania MY 2025/26, MT

Month	Russia	EU	Turkey	Australia	Canada	Egypt	Kenya	Rest of world
July	0*	52	3,466	88,999	0	206	74	12
Aug	168,000*	41	2,309	0	0	258	15	18
Sept	102,000*	42,527	1,196	0	0	0	30	46
Oct	284,000*	99,456	707	37,597	32,451	424	59	5
Nov	58,000*	30	2,143		0	62	526	18
Dec	112,000*	0	2,726	0	0	0	15	13
Jan	0*	0	1,601	0	0	0	28	1
Feb	70,000**		0	0	0	0	0	500
March	0**	0**	2,000**	50,000**	0**	400**	30**	30**
April	50,000**	0**	2,000**	100,000**	0**	50**	40**	10**
May	0**	50,000**	2,000**	60,000**	0**	100**	0**	50**
June	0**	0**	500**	60,000**	20,000**	10**	30**	10**
Total	**844,000**	**192,106**	**20,648**	**396,596**	**52,451**	**1,510**	**847**	**713**

Source: Trade Data Monitor and Private Sources

*Post estimates based on private source data

**Post estimates based on previous years data

The East African Community's Common External Tariff (CET) for wheat is set at 35 percent *ad valorem*. However, beginning in July 2025, Tanzania received approval to waive the CET for one year and instead apply a reduced 10 percent duty on specified quantities of wheat imported by approved domestic manufacturers under the duty remission scheme. In addition, approved manufacturers were authorized to import designated volumes of wheat groats and meals for pasta and spaghetti production at a zero percent duty for the same twelve-month period. These temporary measures are designed to support domestic processors and ensure adequate wheat supplies to meet rising demand.

Table 9: Trends of Wheat Flour Prices in Tanzania (US $/MT)

Month	2023	2024	2025
Jan	797.9	790.1	657.4
Feb	804.9	688.4	686.5
March	883.4	746.1	677.7
April	832	649	631.3
May	873.6	722.6	667.6
June	812.8	656.1	659.5
July	736.9	651.2	691.5
Aug	701.7	590.9	773.8
Sept	715	703.8	784.5
Oct	731.9	662.5	722
Nov	744.9	678.7	801.7
Dec	749.8	703.7	820

Source: FAO: Food Price Monitoring and Analysis (FPMA)

Wheat flour prices in Tanzania show a clear downward trend from 2023 to 2025, with 2025 averaging well below previous years despite notable month-to-month volatility. Prices in 2023 remained consistently high, generally ranging between $730–$880/MT, before easing in 2024 as increased wheat imports and improved regional supply conditions helped moderate costs. In 2025, prices fell further—reaching lows near $630/MT in April—though sharp spikes in August, September, November, and December indicate tightening supplies and stronger seasonal demand. The late-year surge, with prices exceeding $800/MT in November and December, suggests increased consumption pressures and possible supply constraints despite higher import volumes. Overall, the data reflects a market adjusting to greater import availability while still experiencing periodic price volatility tied to supply chain dynamics and demand fluctuations.

Stocks

Post projects wheat ending stocks in MY 2026/27 to increase to 352,000 metric tons, up from 337,000 metric tons in MY 2025/26, driven primarily by increased import levels. In Tanzania, wheat stocks are typically held by traders and millers in commercial storage facilities, which provide a steady flow of supply to the market. Despite higher import volumes, overall storage capacity has not expanded, limiting the country's ability to build larger reserves. Industry sources also report that some wheat imported for Tanzania is being redirected to neighboring countries where Tanzanian millers operate, further contributing to the drawdown in domestic stocks. These factors collectively suggest tighter supply conditions in the upcoming marketing year and underscore the importance of efficient supply chain management to meet rising demand.

Rice

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

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	May 2024		May 2025		May 2026	
Tanzania, United Republic of	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1125	1125	1130	1130	0	1120
Beginning Stocks (1000 MT)	0	0	0	0	0	5
Milled Production (1000 MT)	2515	2515	2510	2510	0	2400
Rough Production (1000 MT)	3811	3811	3803	3803	0	3636
Milling Rate (.9999) (1000 MT)	6600	6600	6600	6600	0	6600
MY Imports (1000 MT)	125	125	500	550	0	650
TY Imports (1000 MT)	425	400	425	550	0	650
TY Imp. from U.S. (1000 MT)	2	0	0	0	0	0
Total Supply (1000 MT)	2640	2640	3010	3060	0	3055
MY Exports (1000 MT)	380	100	150	55	0	40
TY Exports (1000 MT)	150	100	150	55	0	40
Consumption and Residual (1000 MT)	2260	2540	2860	3000	0	3010
Ending Stocks (1000 MT)	0	0	0	5	0	5
Total Distribution (1000 MT)	2640	2640	3010	3060	0	3055
Yield (Rough) (MT/HA)	3.3876	3.3876	3.3655	3.3655	0	3.2464
(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 2026/2027 = January 2027 - December 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

Milled rice production in MY 2026/27 is forecast to fall to 2.4 million MT from 2.51 million MT, a 4.4 percent decline driven by delayed, erratic, and below-average rains. With only 30 percent of rice under irrigation, weather disruptions affected up to 70 percent of the crop, limiting early establishment and reducing soil moisture during key growth stages.

Production prospects were further constrained by fertilizer distribution disruptions linked to the 2025 election-period crackdown, which delayed input delivery and contributed to late application across major producing regions. Farmers also faced heightened exposure to pests and diseases, particularly bacterial leaf blight.

Post anticipates a slight year-on-year decline in harvested area to approximately 1.12 million hectares. Local sources indicate that many farmers are opting not to plant rice due to insufficient rainfall and limited irrigation. Soil moisture remains below normal, and irrigation systems have been unable to compensate for the rainfall deficit, prompting producers to shift toward less water-intensive crops such as sorghum or to leave land fallow to reduce risk. This contraction in area is expected to constrain overall output and may tighten domestic supply if weather patterns do not improve. Although the government aims to expand rice cultivation to 2.2 million hectares by 2030, progress remains slow due to persistent water-access limitations.

Post also forecasts a slight decline in yields in MY 2026/27, which are expected to fall to 3.2464 MT/ha from 3.3655 MT/ha in the previous year. Yield performance has been affected by planting delays of up to two months and fertilizer application delays exceeding one month, both of which disrupted crop

development. These delays limited tillering, nutrient uptake, and grain formation, reducing yield potential even under otherwise stable agronomic conditions. Regional yield variability is expected to increase depending on the severity of delays and farmers' access to inputs.

Consumption

Projected rice consumption in MY 2026/27 is expected to grow slightly, reaching roughly 3.01 million metric tons, up from an estimated approximately 3.0 million metric tons in the previous marketing year. The increase reflects steady population growth and expanding demand from urban food service businesses, including newly opened hotels and restaurants in major commercial centers.

Dar es Salaam remains the country's primary consumption hub, accounting for most of the national rice use due to its size and concentration of economic activity. Although most people still live in rural areas, the share of the population residing in cities has risen steadily over the past decade, and this shift continues to influence dietary habits. Urban households increasingly favor rice because it cooks quickly and uses less energy than corn.

Rising incomes among urban consumers, growing appreciation for aromatic and higher-quality rice varieties, and ongoing efforts to improve the quality and availability of domestic rice all contribute to the upward trend. Together, these factors support continued growth in rice consumption heading into marketing year 2026/27.

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

Month	2023	2024	2025
Jan	1232.9	1027	852.4
Feb	1255	1015.3	859.2
March	1272.1	974.3	887.2
April	1267.9	939.2	925.7
May	1238.3	868.5	891.6
June	1116.1	815.5	910.5
July	1048	772.3	926.2
Aug	1002.4	731.9	960.6
Sept	1015	710.5	990.9
Oct	1055	741.4	999.3
Nov	1083.5	772.8	1023.4
Dec	1100	836.8	1050

Source: FAO: Food Price Monitoring and Analysis (FPMA)

Tanzania's wholesale rice prices declined from 2023 to 2025, with clear seasonal dips from May to August and year-end increases. Prices were highest in 2023, fell sharply through 2024, and stayed low early in 2025 before rebounding above $1,000/MT by December. The data shows a multi-year price decline followed by a late-2025 recovery as supplies tightened.

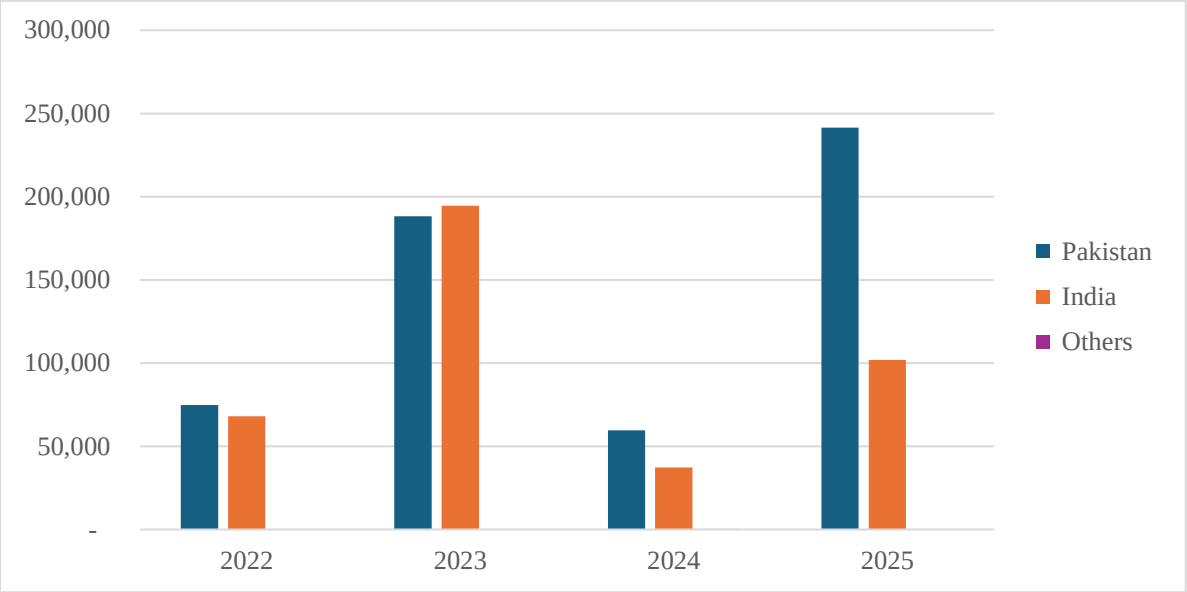
Trade

Post anticipates that rice imports will climb to 650,000 metric tons in MY 2026/27, up from 550,000 metric tons in MY 2025/26, as domestic production continues to fall short of national demand. The Government of Tanzania manages rice importation through a quota-based system that authorizes permits only when domestic supplies are insufficient, reinforcing its policy of protecting local producers. This expected increase in imports reflects ongoing production challenges, including erratic rainfall, limited irrigation infrastructure, and high input costs, all of which constrain yields. At the same time, population

growth and rising urban consumption are widening the supply-demand gap, prompting the government to use controlled imports as a tool to stabilize consumer prices during periods of tight local stocks. Regional trade dynamics—such as informal cross-border flows with Kenya, Rwanda, and other neighbors—also influence domestic availability and can trigger adjustments in quota allocations.

Tanzania's rice imports from 2022-2025 show a clear dependence on Pakistan and India, sharp year-to-year volatility, and a strong rebound after a major dip. Imports rose steeply in 2023 as both Pakistan and India more than doubled their shipments, then collapsed in 2024 when global supply tightened and India restricted exports. By 2025, volumes surged again - especially from Pakistan - indicating renewed domestic shortages or relaxed import constraints. Other suppliers, such as Thailand and the United States, remain inconsistent. Overall, the pattern highlights Tanzania's vulnerability to external supply shocks and its reliance on a narrow set of suppliers.

Figure 4: Trends of Major Rice Exporters to Tanzania, 2022-2025 (MT)



Source: Trade Data Monitor

Tanzania's approach to rice imports relies on a deliberately restrictive mix of high external tariffs and a tightly managed quota system, creating a market where foreign rice enters only when domestic production cannot fully satisfy demand. Under the East African Community's Common External Tariff, rice originating outside the EAC is subject to a 75 percent ad valorem duty or a minimum charge of $345 per metric ton, whichever is higher. This steep duty is intended to keep imported rice priced well above locally grown varieties, discouraging imports. On top of this tariff barrier, the government operates an import-permit system that authorizes shipments only when national supply projections show a shortfall. Unlike where authorities typically issue broad annual guidance, permits are released in small, targeted batches. This allows policymakers to adjust import volumes in response to harvest performance, price movements, and food-security considerations as they unfold.

With this dual structure, Tanzania's rice import levels vary dramatically from year to year. When domestic harvests are strong, the combination of high duties and limited permit issuance keeps imports extremely low. When production dips due to weather disruptions, input constraints, or regional supply pressures, the government temporarily opens the quota to stabilize availability and prevent sharp price

increases. Given the high tariff, only the lowest-cost global suppliers - primarily India and Pakistan - can land rice competitively, which is why they dominate Tanzania's non-EAC import profile. The system ultimately shields local farmers from cheaper global competition, gives the government a powerful tool for managing consumer prices during shortages, and maintains tight oversight of market balance.

Tanzania's rice export outlook for MY 2026/27 points to a marked slowdown, with shipments expected to fall to 40,000 metric tons, compared with 55,000 metric tons in MY 2025/26. The anticipated decline stems largely from the tight export controls introduced in 2023, which traders describe as cumbersome, time-consuming, and costly. These administrative barriers have discouraged many exporters from participating in formal trade. At the same time, strong domestic consumption and favorable local prices have drawn more rice into the internal market, reducing exportable supplies.

Reports from industry contacts indicate that some traders are blending Tanzanian aromatic rice with imported rice and then re-exporting the mixture as Tanzanian-origin product. This practice complicates the accuracy of official export data and raises concerns about maintaining the reputation of Tanzania's premium rice varieties. A Tanzanian official noted that demand for Tanzanian rice remains high across SADC markets, and in some countries, importers do not require permits for rice sourced from Tanzania. The combination of restrictive domestic regulations, strong internal demand, and vigorous regional interest helps explain the expected drop in formally recorded exports.

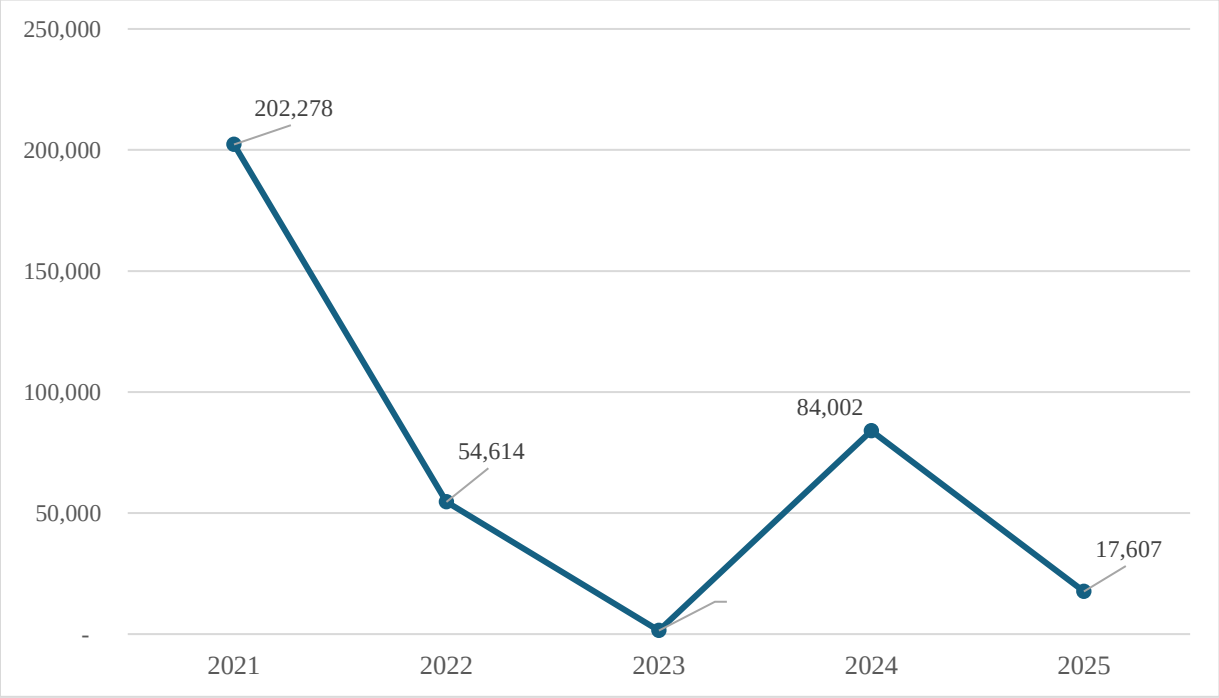
Table 12: Major Buyers of Tanzania Rice, Calendar Year, (MT)

Country	2022	2023	2024	2025
Kenya	54,614	1,461	84,002	17,052
Zambia	30	54	2,431	1,219
Zimbabwe	15	0	330	30
United States	7	0	24	18
Rest of the world	37	7	3,533	53

Source: Trade Data Monitor LLC

Tanzania's rice export pattern from 2022 to 2025 reflects a highly concentrated and unstable market structure, with Kenya overwhelmingly dominating demand but doing so in a volatile manner that causes large swings in export volumes (See Figure 5). Kenya's purchases collapse in 2023, surge dramatically in 2024, and fall again in 2025, indicating that Tanzania's export performance is heavily shaped by Kenya's domestic production cycles and shifting import policies rather than by stable, long-term trade relationships (see Table 12). Other buyers - Zambia, Zimbabwe, and the United States - remain small, irregular, and insufficient to offset this volatility, with occasional spikes that appear driven by temporary shortages or one-off procurement rather than sustained demand. Overall, the data points to an export sector with potential but lacking diversification and resilience.

Figure 5: Calendar Year (2021-2025) Export of Tanzania Rice to Kenya (MT).

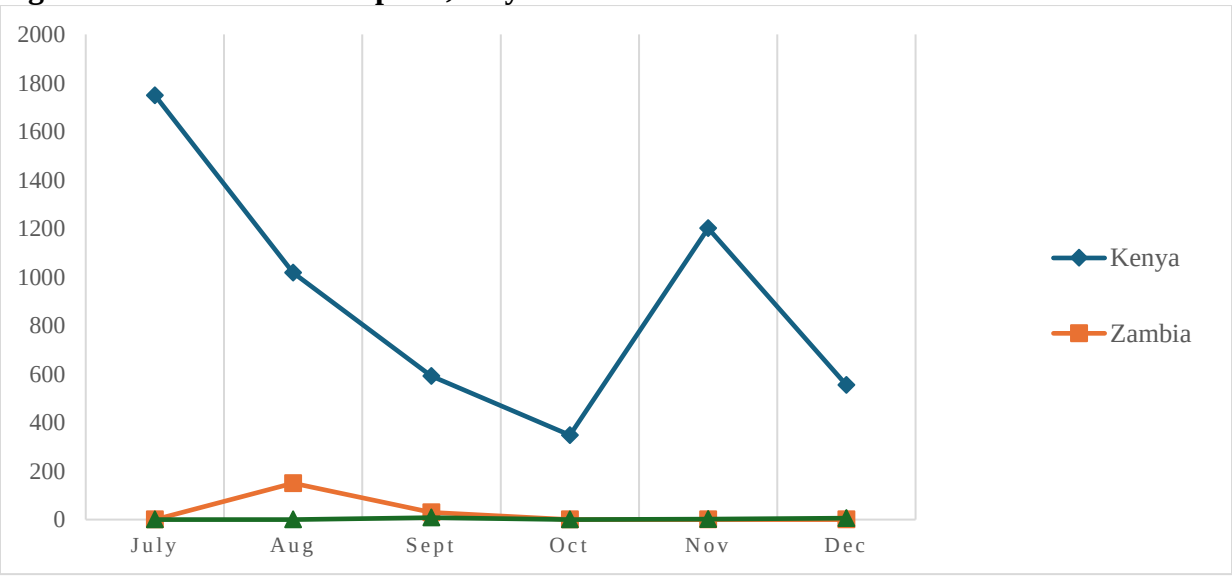


Source: Trade Data Monitor LLC

Changes to MY 2025/26

Tanzania's export outlook for MY 2025/26 has weakened (see Figure 6) as traders report that the country's newly introduced grain export procedures are proving difficult to navigate, slowing the pace of cross-border shipments. At the same time, strong domestic demand - driven by firm local prices and ongoing food-security concerns - is pulling more grain into the internal market, reducing the incentive to pursue exports. As a result, the export forecast has been revised downward to 55,000 MT, reflecting both administrative bottlenecks and a market environment that favors domestic sales over regional trade.

Figure 6: Tanzania Rice Exports, July to December 2025



Source: Trade Data Monitor, LLC

Stocks

Ending stocks for MY 2026/27 are projected to remain near 5,000 metric tons. Rice inventories continue to be held across a large set of actors - large commercial farmers, cooperatives, traders, millers, and government agencies - reflecting a fragmented storage system with limited centralized capacity. The stability in stock levels signals that supply is only just keeping pace with demand, leaving little room for rebuilding reserves. Stronger domestic consumption, driven by population growth and rising household purchasing power, is absorbing much of the available supply. At the same time, on-farm productivity has been constrained by poorly timed fertilizer application, pest outbreaks, and the spread of diseases such as bacterial leaf blight and rice blast.

Additional pressures are preventing stock accumulation. Irregular rainfall patterns, localized drought, and occasional flooding have reduced yields and milling recovery rates. Higher production costs, especially for fertilizer, fuel, and labor, have discouraged farmers from expanding planted area or investing in improved inputs. Post-harvest losses remain significant due to limited drying and storage infrastructure, particularly among smallholders. In some regions, cross-border trade and informal exports have also tightened domestic availability when price differentials are favorable. Taken together, these factors keep inventories flat despite ongoing efforts to stabilize production and strengthen supply chain resilience.

Attachments:

No Attachments