Required Report: Required - Public Distribution **Date:** March 24, 2022

Report Number: TZ2022-0001

Report Name: Grain and Feed Annual

Country: Tanzania

Post: Dar Es Salaam

Report Category: Grain and Feed

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Report Highlights:

MY2022/23 corn production is forecast to decrease by approximately 16 percent to 5.9 million metric tons (MMT) due to drought conditions, fall armyworm infestations, and high fertilizer prices. Rice and wheat imports will continue to rise in MY2022/23 to 1.23 MMT and 250,000 metric tons (MT), respectively to offset domestic production declines and satisfy rising food demand.

Corn

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

Corn	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
Tanzania	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	4200	4150	4100	4400		4000
Beginning Stocks (1000 MT)	808	808	1073	1073		1100
Production (1000 MT)	6500	6400	6500	7000		5900
MY Imports (1000 MT)	15	15	20	20		20
TY Imports (1000 MT)	15	15	20	20		20
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	**7323**	**7223**	**7593**	**8093**		**7020**
MY Exports (1000 MT)	150	150	500	800		100
TY Exports (1000 MT)	150	150	400	800		100
Feed and Residual (1000 MT)	900	600	900	650		700
FSI Consumption (1000 MT)	5200	5400	5400	5543		5620
Total Consumption (1000 MT)	6100	6000	6300	6193		6320
Ending Stocks (1000 MT)	1073	1073	793	1100		600
Total Distribution (1000 MT)	**7323**	**7223**	**7593**	**8093**		**7020**
Yield (MT/HA)	1.5476	1.5422	1.5854	1.5909		1.475

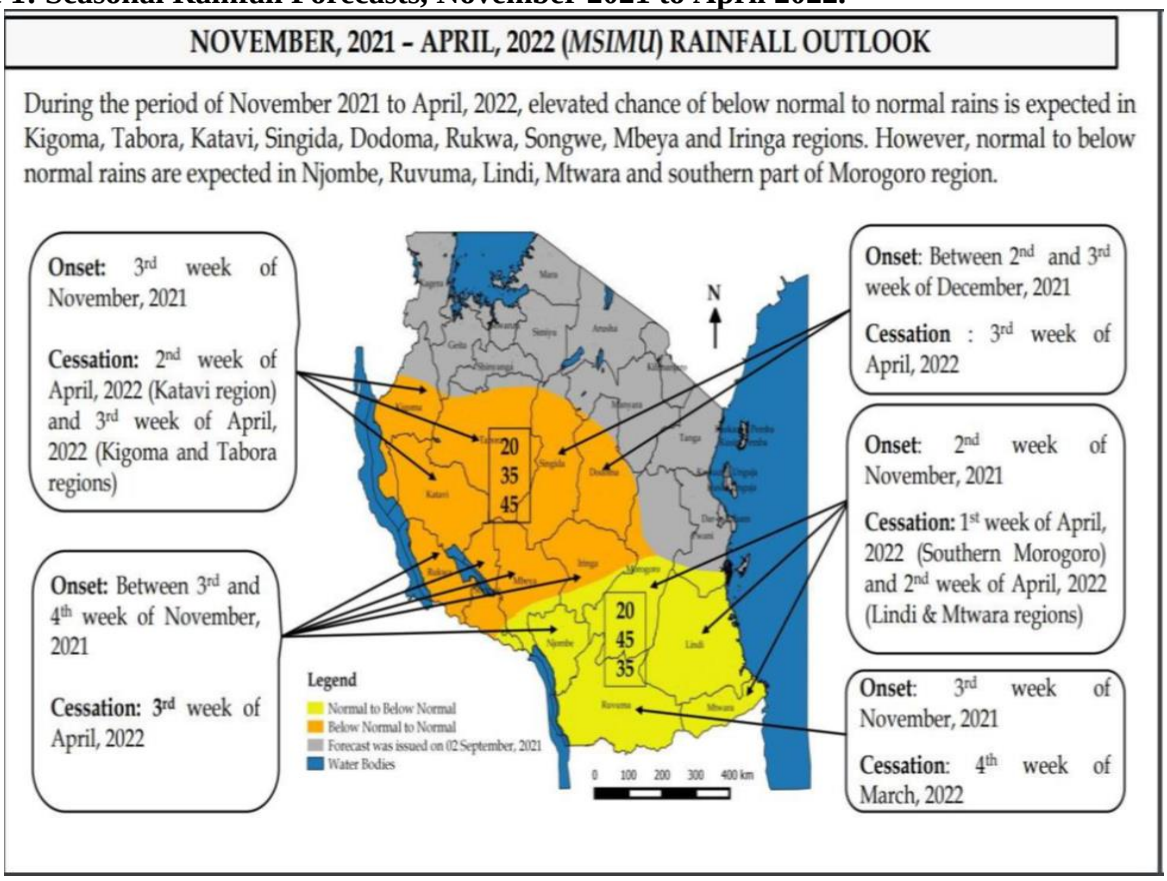
Production

MY 2022/23 corn production is forecast to decrease by 16 percent to 5.9 million MT (MMT) due to drought conditions during the planting season in key regions in northern and southern Tanzania. Post anticipates these conditions will cause area harvested to fall 9 percent as farmers switch to alternative crops such as sunflower and cassava. Farmers in Tanzania typically wait for rainfall before making planting decisions and will switch to other crops if rain is delayed or does not occur.

Corn in Tanzania is grown in unimodal and bimodal areas. For unimodal areas planting occurs from early December to January. In bimodal areas planting runs from October to early November during the short rain season and from early March to early April during the long rain season. In 2021, the unimodal planting season was disrupted by drought conditions until early January, causing many corn farmers to plant alternative crops (see Appendix I for rainfall in unimodal regions). This particularly affected the Southern Highlands region which produces more than half of Tanzania's corn supply.

For bimodal areas, the short rain season did not receive adequate rain for corn production. The 2022 long rain season is expected to receive normal or below normal rain levels which may slightly depress yields in these regions (see Appendix II for rainfall in bimodal areas).

Figure 1: Seasonal Rainfall Forecasts, November 2021 to April 2022.



Source: Tanzania Meteorological Agency (TMA)

Overall yields for MY2022/23 are forecast down due to drought conditions in unimodal areas and an outbreak of fall armyworm in eastern Tanzania. Fertilizer prices have also increased following the suspension of government-determined fertilizer price ceilings in 2021. The current market price of a 50 kg bag of Urea ranges from 58,000 TZS ($25.1) to 88,000 TZS ($38). The price of a 50 kg bag of diammonium phosphate (DAP) ranges from 72,000 TZS ($31) to 100,000 TZS ($43.35). These prices are up to nearly double the maximum prices allowed by the Government of Tanzania (GoT) in 2020 (see Tables 2 and 3). Industry sources indicate that prices have increased due to Covid-19-related logistical challenges. 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: Price Ceilings (in TZS) for DAP Fertilizer from 2015 to 2020.

Regions	2015	2016	2017	2018	2019	2020
Arusha	52,000	55,000	59,000	65,000	60,000	55,539
Dodoma	65,500	65,500	65,500	65,500	70,000	54,109
Iringa	70,000	42,500	51,808	64,780	67,000	54,746
Kagera	65,000	65,500	60,000	70,000	65,000	59,378
Mbeya	68,000	65,000	63,731	65,000	65,000	56,476
Morogoro	65,000	65,600	65,000	70,000	70,000	53,211
Mtwara	60,000	65,000	75,000	85,000	90,000	54,963
Mwanza	90,000	90,000	57,000	60,000	80,000	58,370
Njombe	55,000	55,500	66,000	70,000	77,000	55,571
Coastal	82,000	82,000	60,000	75,000	80,000	51,819
Katavi	62,983	66,800	68,649	70,000	68,000	59,439
Kigoma	84,000	54,571	59,900	68,580	60,000	51,546
Kilimanjaro	66,000	66,000	65,000	56,200	66,000	46,712
Lindi	70,000	80,000	67,000	67,000	66,000	46,439
Manyara	66,000	66,000	66,000	66,000	70,000	48,856
Mara	76,000	54,600	56,731	72,000	67,000	52,481
Ruvuma	66,000	66,000	66,000	64,000	65,000	57,585
Simiyu	45,000	50,000	55,000	55,000	50,000	57,727
Singida	65,000	70,000	75,000	75,000	75,000	55,134
Songwe	52,000	52,000	58,000	67,500	50,000	57,663
Tanga	52,000	72,000	52,000	64,228	68,000	53,206

Source: Tanzania Fertilizer Regulatory Authority (TFRA), Exchange rate: USD 1= TZS 2322

Table 3: Price Ceilings (in TZS) for Urea Fertilizer from 2015 to 2020.

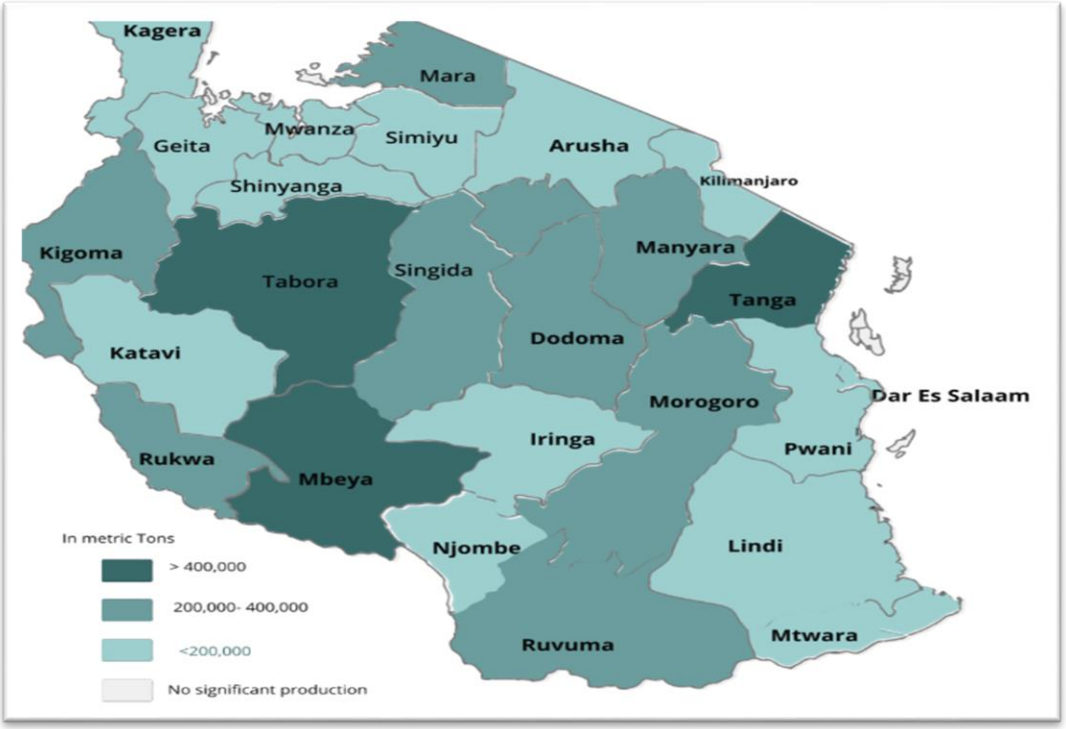
Regions	2015	2016	2017	2018	2019	2020
Arusha	42,000	45,000	54,000	57,000	40,000	47,757
Dodoma	65,500	65,500	65,500	65,500	65,000	46,321
Iringa	50,000	31,000	39,229	52,872	40,000	46,959
Kagera	65,000	65,000	60,000	60,000	65,500	52,337
Mbeya	56,000	50,000	45,278	50,000	55,000	48,689
Morogoro	65,500	65,500	65,500	65,500	65,000	45,424
Mtwara	52,000	55,000	60,000	65,000	60,000	47,176
Mwanza	75,000	75,000	45,000	45,000	70,000	50,583
Njombe	65,000	75,000	70,000	57,000	60,000	47,784
Coastal	70,000	75,000	60,000	90,000	80,000	44,032
Katavi	51,300	54,300	57,380	60,000	55,000	52,595
Kigoma	65,500	65,500	65,500	65,500	65,000	51,546
Kilimanjaro	55,000	54,000	55,000	52,900	50,000	46,712
Lindi	65,000	75,000	57,000	57,000	58,000	46,439
Manyara	55,000	57,000	58,000	58,000	60,000	48,856
Mara	52,000	52,000	44,278	61,000	60,000	52,481
Ruvuma	42,000	55,000	55,000	56,000	55,000	49,798
Simiyu	50,000	60,000	55,000	60,000	65,000	49,940
Singida	60,000	60,000	65,000	65,000	70,000	47,347
Songwe	45,000	48,000	54,000	57,000	60,000	49,876
Tanga	55,000	52,000	40,000	55,898	60,000	45,126

Source: Tanzania Fertilizer Regulatory Authority (TFRA), Exchange rate: USD 1= TZS 2322

MY 2021/22 production is estimated to increase 9 percent to 7 MMT year-on-year due to good weather throughout Tanzania, increased fertilizer use, and expanded area dedicated to corn production driven by timely rainfall. The East Africa desert locust infestations that migrated south from the Horn of Africa in 2021 were largely controlled in Tanzania as were fall armyworm infestations.

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 percent and 25 percent, respectively, of Tanzania's corn-producing area (see Figure 2). 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 2: Corn Growing Areas in Tanzania



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

Consumption

MY 2022/23 food, seed, and industrial (FSI) consumption is forecast to increase 1 percent to approximately 5.6 MMT largely due to higher demand from population increases. Tanzania is growing at an annual rate of 2.9 percent; however, increases in consumption will be limited by domestic production declines. Due to adverse weather conditions, Tanzania may suffer regional pockets of food insecurity which may force some communities to turn to alternative food staples such as sorghum, finger millet, cassava, sweet potato, and bananas. MY2021/22 FSI consumption is estimated to increase 3 percent year-on-year to 5.5 million MT due to plentiful domestic supplies and steady population growth.

Tanzania's annual per capita consumption of corn is roughly 135 kilograms, and white corn is the most popular variety. Corn provides 80 percent of dietary calories and more than 35 percent of utilizable protein in the country. On average, corn purchases account for 16 percent of household food expenditures, but this figure varies dramatically by region.

Post forecasts MY2022/23 feed and residual consumption will increase 8 percent to 700,000 MT as Tanzania's poultry sector increases output to supply a rebound in Tanzania's tourism, hotel, and restaurant sectors as COVID-19 conditions improve and travel to Tanzania bounces back. In October 2021, Tanzania issued 1.6 million import permits for chicken parent stock, setting the stage for increased poultry production in MY2022/23. Tanzania infrequently issues import permits for poultry parent stock, only allowing imports when a deficiency is perceived by the GoT. Corn is a key ingredient for poultry feed with 70 percent of feed rations composed of corn and protein concentrate.

MY2021/22 feed consumption is estimated to rise 8 percent to 650,000 MT as meat and poultry consumption increases due to partial resumption of tourism and the opening up of businesses and institutions as COVID-19 conditions continue to improve.

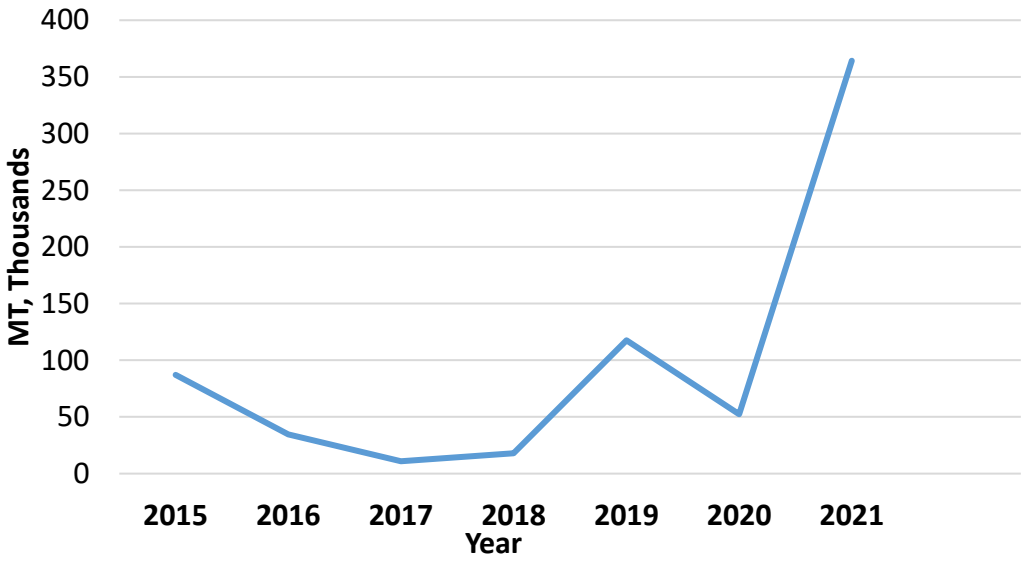
Trade

MY 2022/23 corn exports are forecast to decline sharply to 100,000 MT from 800,000 MT in the previous year as Tanzania's lower supply is directed to domestic consumption. In the past, the GoT has regularly implemented export bans to ensure local corn production is consumed domestically, especially during times of scarcity.

MY2021/22 exports are estimated to reach a record 800,000 MT from 150,000 MT as Tanzania's surplus corn production is exported north to offset low corn production in Kenya.[1] As of November 2021, Tanzania's corn exports stand at 364,000 MT, a nearly 600 percent increase from the year before, driven primarily by exports to Kenya (see Figure 3 and Table 4).

MY2022/23 corn imports are anticipated to remain flat at 20,000 MT. Tanzania largely imports corn for seed use, as well as some yellow corn for feed and corn products such as corn oil and breakfast cereals. Tanzania predominately imports corn from South Africa and Zambia.

Figure 3: Tanzania Year-to-Date MY Corn Exports (July to November)



Source: Trade Data Monitor, LLC

[1] For more on Kenya, see the Kenya 2022 Annual Grain and Feed Report.

Table 4: Tanzania Year-to-Date MY Corn Exports by Destination (July to November)

Tanzania Corn Exports by Importing Country (July to November)							
Country	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**
Kenya	87,139	34,480	10,878	17,989	117,617	52,253	364,247
Ghana	0	0	22	0	0	0	0

Source: Trade Data Monitor, LLC

Stocks

For MY 2022/23 post forecasts a 45 percent decline in ending stocks to 600,000 MT as production declines expose some parts of the country to food insecurity. While government-held stocks increased in 2021 (see Table 5), these reserves will be depleted as Tanzania's production falls off in MY2022/23.

Table 5: Corn Stocks Held by the Tanzania National Food Reserve Agency (NFRA), 2017 to 2021 (MT)

Month	**2017**	**2018**	**2019**	**2020**	**2021**
January	86,835	91,947	93,037	43,597	110,398
February	86,444	91,313	85,525	41,231	110,389
March	86,443	83,650	78,336	39,597	109,231
April	86,278	73,468	68,748	38,053	109,231
May	74,826	68,893	68,058	38,291	108,284
June	70,393	63,844	67,336	52,725	107,384
July	68,697	62,288	67,410	90,255	107,384
August	78,434	62,317	68,407	92,991	123,635
September	85,403	78,224	61,711	109,733	150,057
October	89,248	87,435	55,853	110,895	192,408
November	93,353	92,402	52,727	110,289	209,057
December	92,074	95,534	52,498	110,398	214,968

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

Some parts of Tanzania are already vulnerable to food insecurity. According to the 2021 GoT Comprehensive Food Security and Nutrition Assessment, 14 of Tanzania's 172 councils are currently experiencing crisis levels of food insecurity, with 20 to 30 percent of the population in these counties experiencing high levels of acute food insecurity.

Tanzania's storage capacity continues to expand. In 2017, Tanzania received a $55 million loan from the Government of Poland to construct grain silos. Tanzania is constructing silos in eight NFRA zones:

Babati (Northern Region), Dodoma (Central Region), Makambako (Southern Highlands), Mbozi (Southern Highlands), Shinyanga (Lake Region), Songea (Southern Highlands), Sumbawanga (Southern Highlands), and Mpanda (West Region). So far, 68 percent of the Songea silos have been constructed with completion expected by MY 2022/23. When complete, sources note that NFRA will be able to store 546,000 MT of maize per year. Currently, NFRA owns 30 storage facilities with a total storage capacity of 246,000 MT (see Photo 1).

Photo 1: Construction Site of Silo Complexes at NFRA Babati

Policy

Tanzania uses a facility called the Strategic Grain Reserve (SGR) to guarantee markets for farmers. The SGR absorbs corn surplus in the market by buying corn from farmers at a fixed price above the prevailing market price. Tanzania frequently implements trade and market measures such as the SGR to help maintain stable market prices for corn and inputs. Until 2021, the GoT enforced price ceilings for fertilizers. These ceilings have been suspended and currently market prices prevail in Tanzania for DAP and urea fertilizer. The GoT does not subsidize fertilizer prices.

Two years ago, Tanzania launched a 10-year National Post-Harvest Management Strategy (NPHMS) and a 10-year implementation plan (SIP). The purpose of this plan is to reduce post-harvest losses, facilitate agricultural marketing systems, strengthen institutional capacity, mitigate the effects of climate change, address inadequacy in post-harvest management financing, and develop a standard methodology for collecting data and estimating post-harvest loss in the country. While gains have been made in aflatoxin mitigation, the full impact of this strategy on production has not yet occurred.

The GoT is preparing to address food insecurity in MY2022/23. In November 2021, the GoT began work on a drought contingency plan, which is still under development. A key part of this plan will likely be mobilizing NFRA food stocks and releasing them in MY2022/23 to food insecure areas.

Marketing

Corn prices declined in early 2021 due to ample domestic production but began to rise in October 2021 as drought conditions began to affect maize-producing areas during planting. Prices are anticipated to continue to rise into MY2022/23 as lower domestic production reduces corn availability.

Table 6: National Average Wholesale Corn Prices

The year 2020	**Price in $ per 100Kg**	**The year 2021**	**Price in $ per 100Kg**
Jan	40.00	Jan	24.51
Feb	37.00	Feb	22.20
March	28.00	March	21.00
April	26.00	April	19.40
May	24.00	May	19.00
June	25.00	June	18.43
July	25.12	July	19.00
Aug	24.40	Aug	19.31
Sept	23.50	Sept	19.12
Oct	25.00	Oct	21.00
Nov	25.00	Nov	21.41
Dec	24.51	Dec	25.00

Source: Bank of Tanzania, Ministry of Industry and Trade

Wheat

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

Wheat	2020/2021		2021/2022		2022/2023	
Market Begin Year	Jul 2020		Jul 21		Jul 22	
Tanzania	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	60	60	70	70		60
Beginning Stocks	215	215	90	90		85
Production	85	85	90	100		65
MY Imports	990	990	1200	1135		1230
TY Imports	990	990	1200	1135		1230
TY Imp. from U.S.	0	0	0	0		0
Total Supply	1290	1290	1380	1325		1380
MY Exports	0	0	0	0		0
TY Exports	0	0	0	0		0
Feed and Residual	0	0	0	0		0
FSI Consumption	1200	1200	1300	1240		1285
Total Consumption	1200	1200	1300	1240		1285
Ending Stocks	90	90	80	85		95
Total Distribution	1290	1290	1380	1325		1380
Yield	1.4167	1.4167	1.2857	1.4286		1.0833

Production

Production in MY2022/23 is forecast to fall from 100,000 MT to 65,000 MT year-on-year due to drought conditions. More than 90 percent of Tanzania's wheat production comes from the Northern and Southern Highlands regions. Planting in the Southern Highlands for the MY2022/23 season was disrupted by delayed rainfall in late 2021 and prolonged drought in early 2022. Planting in the Northern Highlands (which normally occurs in February and March) has been slowed by low rainfall and soil moisture.

Post anticipates MY2022/23 area harvested will drop 14 percent year-on-year to 60,000 hectares as farmers switch to beans in the Northern Highlands and to beans and peas in the Southern Highlands due to delayed rainfall. Yields are also expected to decline, particularly in the Northern Highlands where below-average rainfall is anticipated in Spring 2021. High fertilizer prices will likely deter proper fertilizer application and further suppress yields.

Production in MY2021/22 is estimated to rise 18 percent year-on-year to 100,000 tons due to good weather which improved yields and incentivized an expansion in area harvested.

The level of wheat mechanization in Tanzania can be grouped into three modes of production: large-scale mechanized production, small-to-medium-scale mechanized production, and hand-tool production, with large-scale mechanized farms dominating production in the Northern Highlands. In the Southern Highlands, farms fall under a mix of medium-scale mechanization and hand-tool production.

Consumption

Post forecasts a 2 percent increase in MY 2022/23 wheat consumption to approximately 1.29 million metric tons due to higher levels of home baking, urbanization, and a growing middle-class. These same dynamics are estimated to drive a 5 percent year-on-year increase in MY2021/22 consumption. A shift towards wheat consumption has been observed in urban and peri-urban areas, with urban areas accounting for 80 percent of Tanzania wheat consumption. Growth of major cities like Dar es Salaam, Mwanza, and Arusha will create long-term demand growth for wheat products as consumers turn to staples that are easy to prepare and consume. Demand growth has been supported by expansion of wheat processing facilities such as milling plants and bakeries. Tanzania's overall milling capacity currently stands at about 10,000 MT per day, compared to 6,000 MT in 2016, although no new milling investments have occurred in 2021. Growth wheat products include pasta, biscuits, and breakfast cereals. Wheat consumption in Tanzania is ranked fourth after maize, cassava, and rice. The Tanzania wheat milling industry is concentrated in Dar es Salaam by local companies that have modern wheat mills and silos.

Trade

Post forecasts a 4 percent increase in MY 2022/23 wheat imports to 1.2 MMT due to rising demand and drought-related decreases in domestic production. Tanzania primarily imports wheat from Russia, Australia, Ukraine, Argentina, the EU, and Canada, (see Table 8). While Tanzanian traders have an appreciation for the high quality of U.S. wheat, they report that high shipping costs make it less competitive than alternative sources. Both Ukraine and Russia are important exporters to Tanzania, particularly Russia which regularly supplies more than half of Tanzania's wheat supply. The impact of the Ukraine conflict on Tanzania's wheat supply will depend on the duration of hostilities. Traders report that they currently have sufficient stocks of wheat to supply short-term demand and may begin importing more in July 2022.

MY 2021/22 wheat imports are forecast to increase from 990,000 MT to 1.11 million MT on rising consumer wheat demand. Wheat imports are controlled by the GoT which sets an import quota through the issuance of import permits. Under this system, the GoT estimates the total demand for wheat and issues import permits until this demand is met, restricting additional imports. For MY2022/23, the GoT has determined that Tanzania has a demand of 1 million MT. The GoT currently applies a tariff rate of 10 percent for hard wheat imports, lower than the EAC common external tariff of 35 percent. This lower tariff is submitted annually to the EAC for approval. Tanzania is not a significant exporter of wheat.

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

Country	2016	2017	2018	2019	2020	2021
Russia	376,344	680,662	760,613	516,097	700,911	377,123
Australia	0	1,257	1,008	1,005	903	200,867
Ukraine	0	415	40,000	53,739	46,620	113,595
Argentina	48,580	90,835	33,203	0	0	66,112
Canada	63,282	110,508	90,586	48,699	33,425	29,499
India	26	26	25	13	45	71
EU 27	287,741	181,049	29,100	164,537	208,171	0
United States	66,508	2,900	12,000	102,735	0	0

Source: Trade Data Monitor, LLC

Stocks

Post forecasts MY2022/23 ending stocks to hold steady from MY2021/22 as increased consumption is accommodated by higher imports. Wheat stocks are mainly held by traders, millers, and farmers in their stores and warehouses.

Marketing

The price of a 5 kg package of wheat flour is currently $5.2 from $4.1 in 2020/2021.
In major cities, a 500-gram loaf of bread that sold at $0.7 in MY 2020/21 has been selling for $1 in MY 2021/22. The price of wheat flour fluctuates depending on distance from Dar es Salaam where all mills are situated. Traders have not indicated an increase in prices associated with the Ukraine conflict at the time of this report, but prices may increase if the conflict continues, due to competition for alternative import sources and high fuel costs. Russia and Ukraine are key wheat suppliers to Tanzania, accounting for more than half of Tanzania’s imports in 2021.

Rice

Production, Supply, and Distribution

Table 9: Rice: Production, Supply, and Distribution (PS&D) Table

Rice	2020/2021		2021/2022		2022/2023	
Market Begin Year	May 2020		May 2021		May 2022	
Tanzania	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1100	1100	1100	1150		1100
Beginning Stocks	0	100	0	100		125
Milled Production	2310	2310	2400	2525		2300
Rough Production	3500	3500	3636	3826		3485
Milling Rate (.9999)	6600	6600	6600	6600		6600
MY Imports	120	100	120	50		250
TY Imports	100	100	120	50		250
TY Imp. from U.S.	0	0	0	0		0
Total Supply	2430	2510	2520	2675		2725
MY Exports	30	185	30	50		5
TY Exports	30	185	30	50		5
Consumption and Residual	2400	2225	2490	2500		2590
Ending Stocks	0	100	0	125		80
Total Distribution	2430	2510	2520	2675		2725
Yield (Rough)	3.1818	3.1818	3.3055	3.327		3.1682

Production

Post forecasts MY 2022/23 rice production will fall 8 percent year-on-year to 2.3 MMT due to drought conditions. Rice production in Tanzania is mostly rain-fed and irrigation systems largely consist of channeling rainwater to rice fields, making them vulnerable to low rainfall. Area harvested is expected to decrease 4 percent to 1.1 million hectares as many farmers are leaving fields fallow in the Southern Highlands and northern regions. MY 2021/22 production is estimated to increase 9 percent year-on-year to 2.5 MMT on good weather conditions.

Tanzania's rice production has increased over time due to the impact of the 10-year GoT National Rice Development Strategy Phase II (NRDS-II). The NRDS-II has made progress in boosting fertilizer use and expanding milling facilities. New irrigation schemes are under construction; however, very few are operational as most are still not yet complete or suffer from water shortages. The NRDS-II has ambitious goals to double Tanzania's rice area to 2.2 million hectares and double productivity by 2030.

These goals have not yet been achieved due to many challenges including insufficient funds for the development of new rice varieties, water and irrigation shortages, and limited extension services.[2]

Consumption

MY 2022/23 consumption is forecast to increase 4 percent year-on-year to 2.59 MMT. Rice is becoming increasing popular in Tanzania, especially in urban areas. Compared to wheat, it is more accessible and affordable. Additionally, rice is viewed as a healthy food staple compared to corn. As Tanzania's urban areas expand, rice demand will continue to grow. Rice is associated with a higher social status and as Tanzania's middle class continues to expand it is increasingly preferred to corn.

Dar es Salaam is the principal market for rice and accounts for about 60 percent of national consumption. Tanzanian rice consumers are particular about grain size, color, flavor, and aroma, demonstrating preferences for the following characteristics: long slender rice, translucence, intermediate amylose content, and aromatic to semi-aromatic varieties. Two popularly preferred rice varieties include Supa and TXD 306 (SARO 5). Premium, grade one, and standard are common rice grades available in local markets. Premium prices are usually given to aromatic rice.

Trade

MY 2022/23 imports are forecast to increase dramatically from 50,000 MT to 250,000 MT to offset drought-related declines in domestic production and to meet Tanzania's growing demand. Tanzania primarily imports rice from Pakistan, India and Thailand (see Table 11 below). 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. In 2018, the GoT announced a rice import quota to stimulate domestic production. Similar to wheat, the GoT estimates local rice demand and issues import permits to supplement domestic production until supplies are sufficient to meet local consumption.

Table 11: Major Rice Exporters to Tanzania, Calendar Year, MT

Country	2016	2017	2018	2019	2020	2021
Pakistan	173,596	180,099	190,741	146,444	107,327	53,727
India	8,116	8695	9,209	7,628	23,646	34,525
Thailand	23,425	51,206	30,910	14,885	4,280	1,254
United States	19	11	16,644	0	10	21
China	0	0	0	260	1040	0

Source: Trade Data Monitor LLC

[2] For more on the NRSD-II see: National Rice Development Strategy Phase II.

While the GoT has sought to promote Tanzania as a rice-providing country for the East Africa region, MY 2022/23 exports are forecast to be minimal due to domestic production declines and high local demand. Tanzania frequently exports to regional countries including Uganda, Rwanda, Kenya, Burundi, and occasionally Malawi and Zambia. Most traders purchase rice for export at milling facilities in rice-producing areas of the country.

Stocks

Post forecasts a decline in MY 2022/23 ending stocks from 125,000 MT to 80,000 MT due to low production and high demand. Ending stocks are mainly held by individual farmers, cooperative warehouses, traders, or millers in rented or individually owned warehouses.

Marketing

Rice markets in Tanzania are active throughout the calendar year. Consumers mostly prefer polished milled rice which is aromatic long grain rice. There is also a demand for sticky white long grain rice. Brown rice and rice flour are available in a very limited supply, and value-added rice products like rice crackers are not common. Consumers usually purchase loose rice from bulk sacks either from traditional small retailers or at farmers' markets. Quality differentiation is limited mainly to the amount of broken rice present, whether it is aromatic or non-aromatic, and whether it is local or imported. Branding for local rice in supermarkets is still limited.

Average national prices have begun to increase year-on-year in late 2021 based on expected lower supplies due to drought conditions.

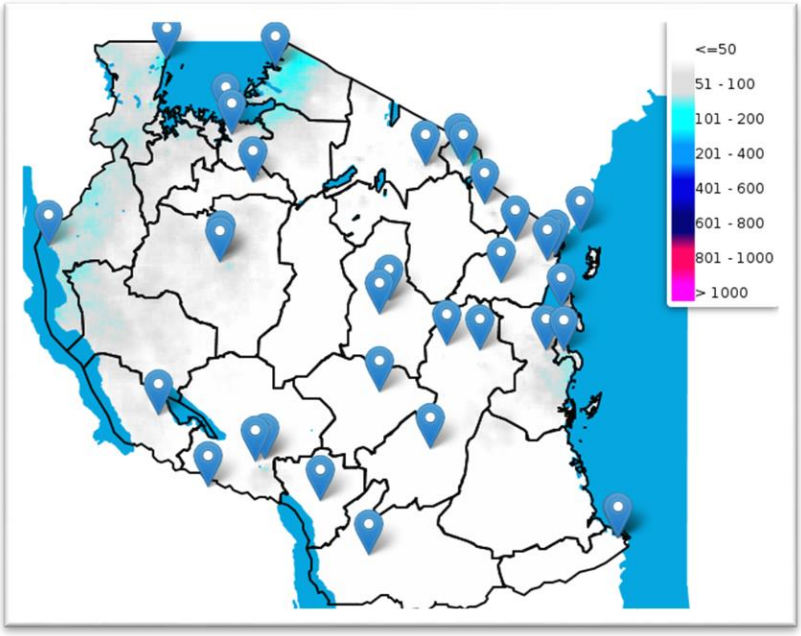
Table 12: National Average Wholesale Prices of Rice in Tanzania

2020	Price in $ per 100Kg	2021	Price in $ per 100 Kg
Jan	82.00	Jan	62.20
Feb	82.23	Feb	54.00
March	77.00	March	61.21
April	78.24	April	62.00
May	70.10	May	59.00
June	66.00	June	58.30
July	64.20	July	59.00
Aug	63.40	Aug	60.40
Sept	62.00	Sept	61.00
Oct	60.13	Oct	65.45
Nov	62.20	Nov	66.54
Dec	62.00	Dec	71.10

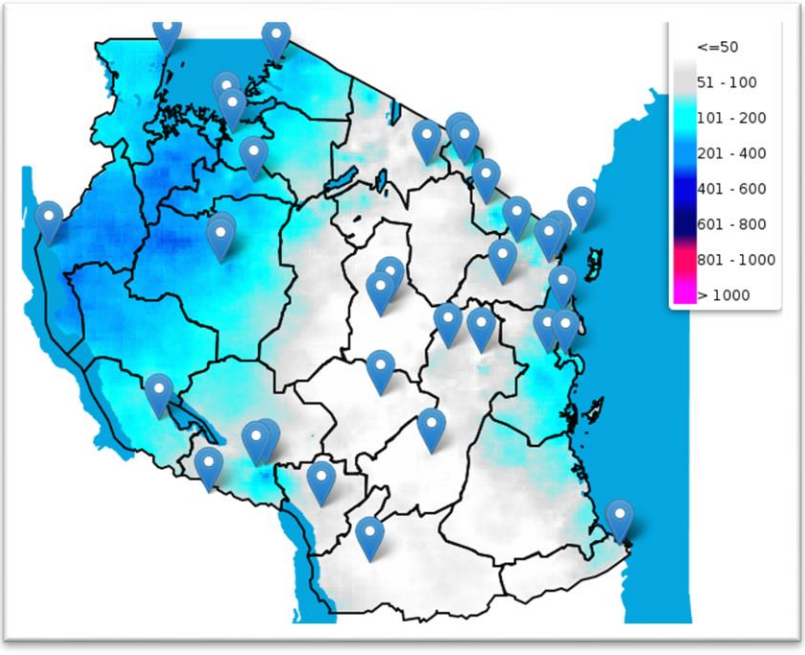
Sources: Bank of Tanzania and Ministry of Industry and Trade.

Appendix I: Rainfall in Unimodal Corn Regions, November 2021 to February 2022 (in millimeters)

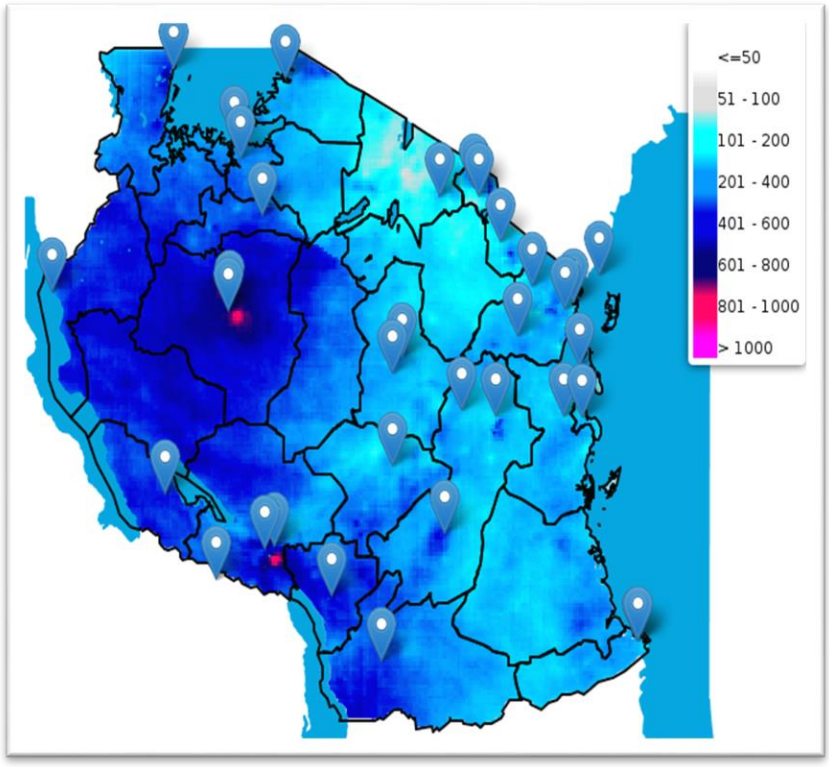
November 2021 Rainfall



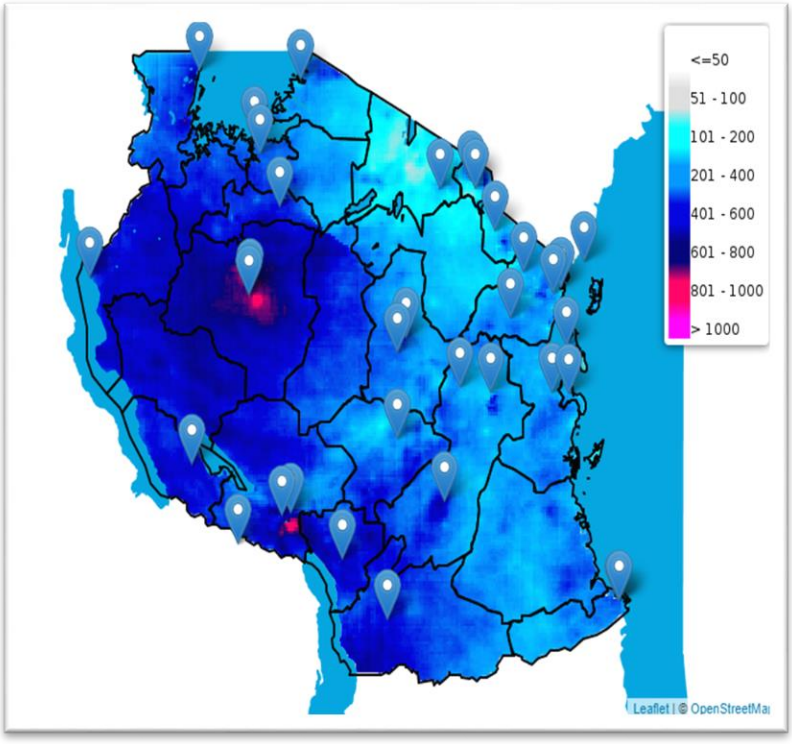
December 2021 Rainfall



January 2022 Rainfall



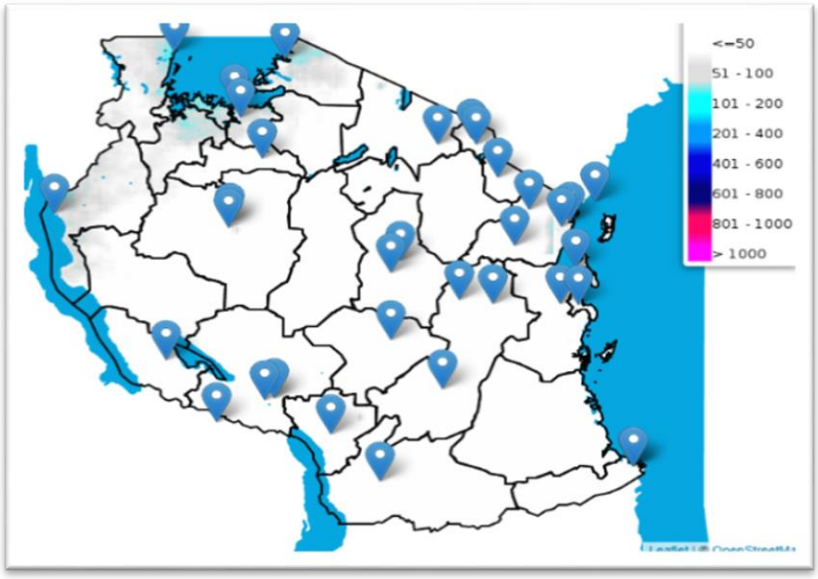
February 2022 Rainfall



Source: Tanzania Meteorological Agency (TMA)

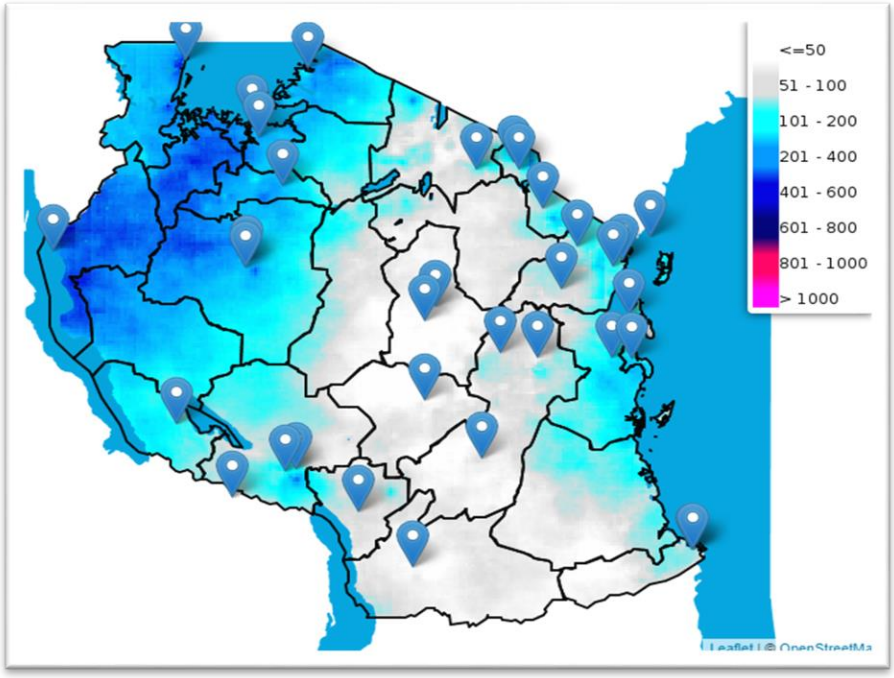
Appendix II: Rainfall in Bimodal Corn Regions, October 2021 to December 2021 (in millimeters)

October 2021



November 2021

December 2021



Source: Tanzania Meteorological Agency (TMA).

Attachments:

No Attachments