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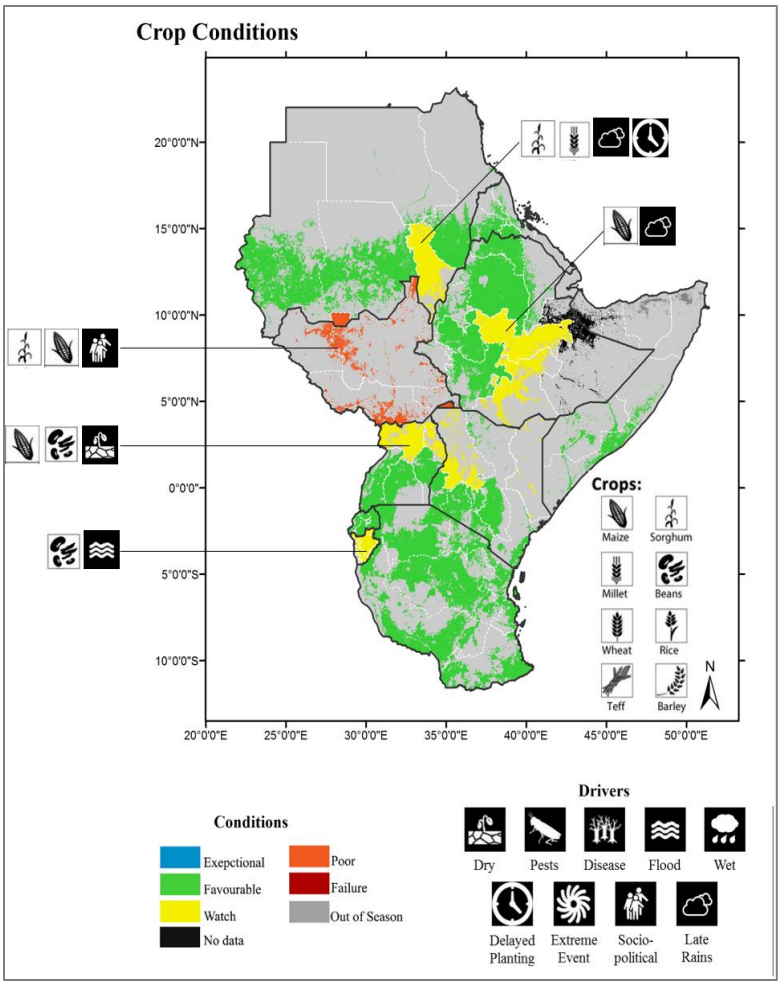
EASTERN AFRICA CROP MONITOR BULLETIN

Overview

- Eastern Africa received average to above average **rainfall** resulting in overall favorable crop conditions. Most crops have been harvested with main **crops** performing well. Uganda however, the region's beans surplus producer is projected to have **shortfalls** in the third quarter due to poor crop performance.
- In the oncoming OND Season, most areas of Eastern Africa are predicted to receive normal and above normal rainfall which will be **favorable** for crop season. Early **onset** of rain is also predicted.
- In the second quarter, **prices** of grain staples were well below last year's levels in most countries.
- **Trade:** In the second quarter, intra-regional trade decreased following availability of staple grains from the main season in Tanzania, and Uganda as well as the 2018B season in Burundi and Rwanda.



Contents

Market Information Grain Trade Q2

Maize	Dry beans	Rice
18% ▼ Decrease in total trade of Maize in the Region	16% ▼ Decrease in total trade of dry beans in the Region	44% ▲ Increase in exports out of Tanzania
Total trade 130,651 MT of maize in Q2	Total trade 71,253 MT of dry beans in Q2	Total trade 68,659 MT of rice exported from TZ in Q2
Price Max $609 MT JUBA Min $144 MT KAMPALA	Price Max $1,883 MT JUBA Min $379 MT KAMPALA	Price Max $1,391 /MT NBI Min $881 MT DAR ES SAL.

Bulletin Quick Access Code

Access Link

Want to know when to plant?

Rainfall Onset >> Page 14

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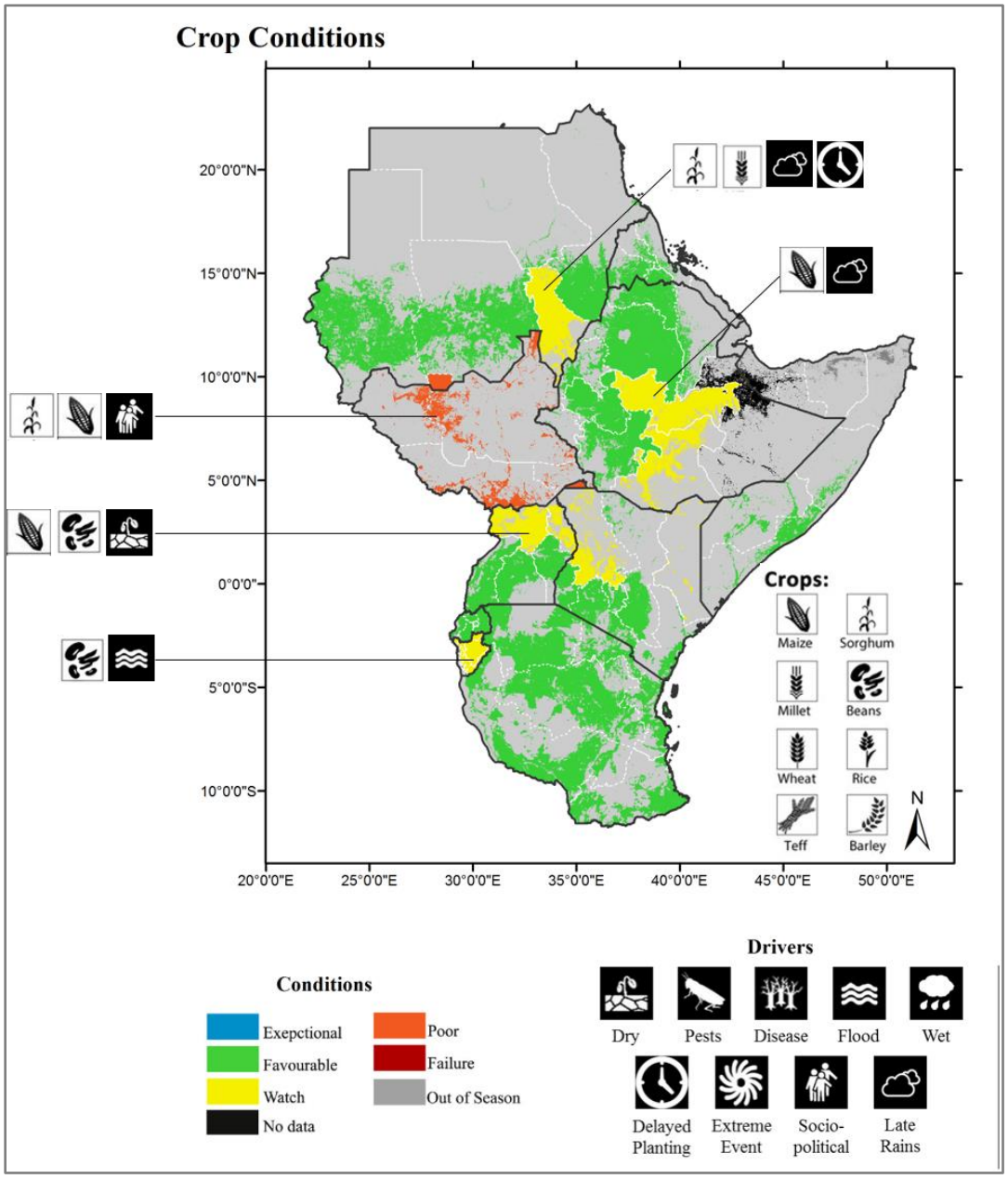
Regional Crop Conditions



Most countries received favorable rainfall with parts of northern Eastern Africa region experiencing above average rainfall. The crops are at different stages of development in the northern regions while southern regions have harvested main crops. Cereals harvest in Kenya, Uganda and Tanzania has been favorable and exceptional.

Burundi is in the climatological dry season with much of the activities being land preparation for the coming season.

Ethiopia *Meher* season begun in June and most areas have received near normal *Kiremt* rainfall. Fall Army Worm infestation is under control in most crop areas and crop conditions are favorable. However Central Oromia and Oromia regions have had dry conditions which may affect the current maize crop.

Eritrea: In *Maakel Zoba* despite late onset, distribution of the Kremti rains has been good. In *Anseba* and the *Gashbarka Zobas* rainfall started early but ceased after the onset. The rains returned during the third week of July. Early planters lost their crop but have replanted and the crop is in favourable condition. Only *Maekel, Debub, Gash Bark, Anseba* and parts of NRS zones receive the *Kremti* rains (June-September).

Kenya received good rainfall in the early months of the season which led to good maize crop. Limited cases of FAW were reported in some areas but not

*(**Kenya** Continued)* significant to affect production. The heavy rains however significantly reduced beans production and affected riverine crop areas of North Eastern and Coast regions.

Rwanda wheat, rice and beans have been planted and favorable conditions prevail on the growing crops.

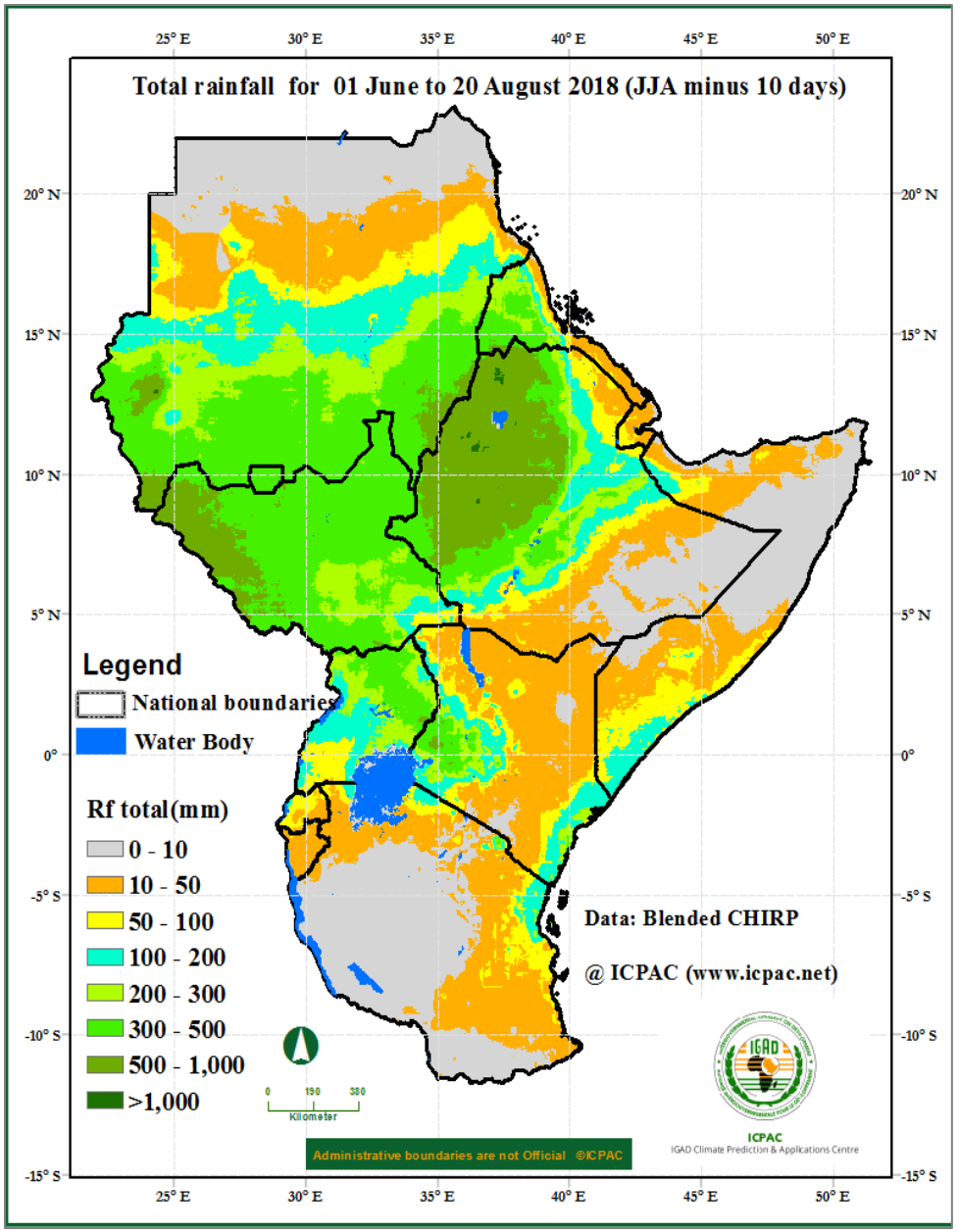
South Sudan's *Renk* and *Manyo* counties which produce majority of the sorghum crop have had conflict affect production. Production of other season crop is going on in Bar Ghazal and Greater Equatorial.

Somalia crop harvested in late July and early August in the Southern Somalia and were above average. However, flood recessional cultivation in riverine areas in *Hiran, Middle Shabelle, Gedo* and *Lower and Middle Juba* is continuing and are at vegetative and good condition. In northwest agro pastoral areas of *Woqoyi Galbeed* Region, long cycle sorghum is at crop establishment stage and is at normal condition and will be harvested in November.

Sudan planting of crop was complete with some crop areas of *Kassala* and *Gederef* having received floods. There was no damage to crops. There was delayed rainfall and that led to delay in planting experienced in Blue Nile State, but this was in a minimal scale, which may not affect yield. The crops are generally under favorable conditions.

Tanzania is in harvest period with favorable production of the main crops.

Uganda good cereals harvest was received. Current reports indicate that maize and beans in the northern crop area are experiencing dry conditions.



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Regional Grain Markets and Trade Overview

Summary

• In the second quarter, prices of grain staples were well below their year-earlier levels in most countries.

• Tanzania and Uganda, the regions surplus producers' harvested the main season crop in May and June respectively with maize, sorghum, millet, and rice performing exceptionally.

• Uganda, the region's bean surplus producer is projected to have shortfalls in the third quarter due to poor crop performance.

Trade: In the second quarter, intra-regional trade decreased following good availabilities of staple grains from the main season in Tanzania, and Uganda also, the 2018B season in Burundi and Rwanda. There were fewer barriers to trade with no bans and food subsidy programs in place compared to same period last year. In the second quarter, volumes of maize and beans were 130,651MT and 71,253 MT traded through the monitored corridors decreased by 16% and 18% respectively. This can be attributed to an improved output in countries that harvested within the second quarter, therefore, the need for imports decreased. For beans, the crop output was affected by wet conditions therefore expected to lead to overall tightened supplies in the third quarter. Volumes of rice exported from Tanzania, the regions primary producer increased significantly by 44% owing to large stocks at lower prices brought about by lower prices of substitute maize flour. Crop season assessment in the Southern region of Tanzania revealed good prospects for the rice crop with above average yield expected in the concluded May to June harvest, therefore, exports out of Tanzania is expected to remain elevated in the third quarter, therefore, easing regional demand.

Figure 1: Quarterly Trade flows in East Africa (Maize). Source, EAGC RATIN, and FEWS NET

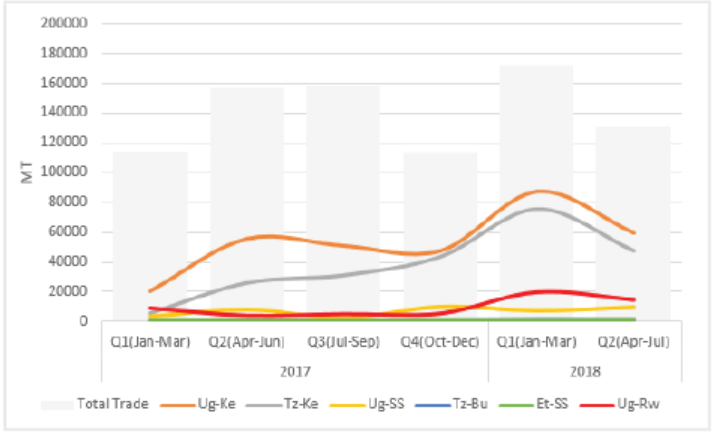
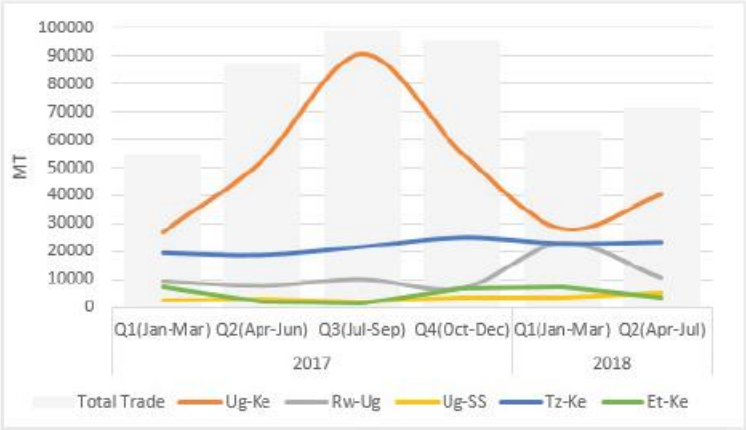


Figure 2: Quarterly Trade flows in East Africa (Beans). Source EAGC RATIN and FEWS NET



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Markets: Prices remain low in the second quarter

Maize: In ***Uganda*** and ***Tanzania*** Stocks of maize was adequate in June and July therefore, prices were generally stable and at levels below those a year earlier (about 25-30% lower). In July, prices of maize declined in ***Rwanda*** and ***Burundi*** with the start of 2018B harvest resulting to good availabilities with prospects looking good. In ***Kenya***, prices declined since March with imports from Uganda and Tanzania coupled with outputs the second season in South Rift significantly improving stocks. In ***South Sudan***, prices declined seasonally at the beginning of the quarter as green crop improved market availabilities, however, prices remained high towards the end of the quarter due to high fuel prices, weak currency, and insecurity.

Figure 3: Maize prices and projections in urban markets of East Africa

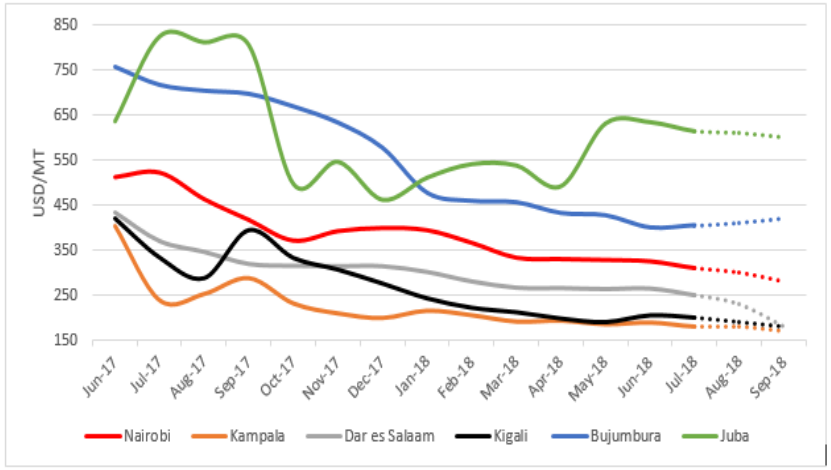
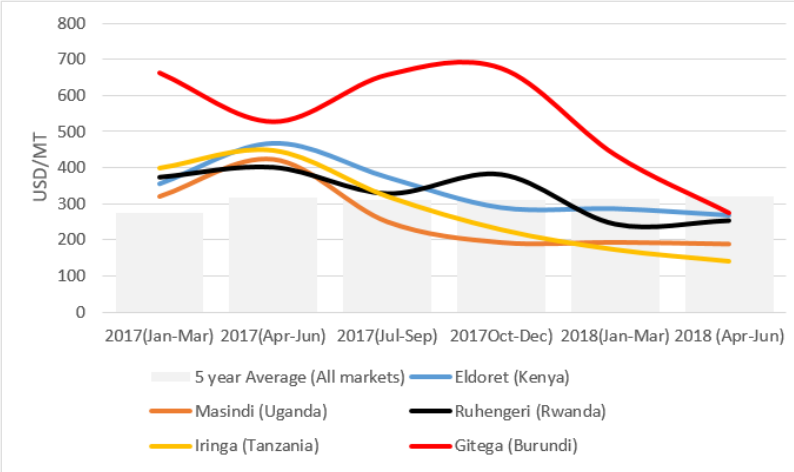


Figure 4: Quarterly and the Five-year average of Maize prices in the production markets of East Africa. Source, RATIN



Beans: Prices of beans were relatively stable in the second quarter in the region. Demand for beans in the region was largely met by ***Uganda*** which had an above average output in November to January 2018; with average harvest to below average expected in August following wet conditions experienced late in the season. Prices of all beans varieties were lower by 40 percent on average compared to last year's high levels. In ***Kenya***, domestic stocks diminished seasonally early in the second quarter, however, imports from Uganda shored up supply in the western markets. Prices remained relatively stable with the commodity trading at USD 690/MT on average by end of the quarter. In **Tanzania**, prices declined with the onset of the *Msimu* harvest in May and leveled off above last year's prices due to opening up of trade with significant volumes exported to the Southern Africa countries.

In ***Burundi*** and ***Rwanda***, prices declined with early harvest stocks from the 2018B in June however, stocks declined precipitously as harvest realized was below average following extended wet conditions in May. In July prices eased marginally with the commodity trading at USD 480/MT and USD 327/MT in Burundi and Rwanda respectively, however, an upward trend is expected towards the end of the third quarter as stocks diminish seasonally.

Figure 5: Beans prices and projections in urban markets of East Africa. Source RATIN.

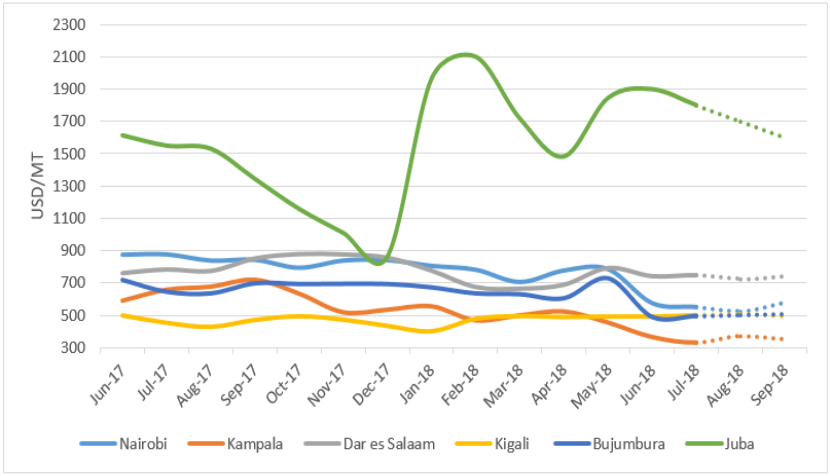
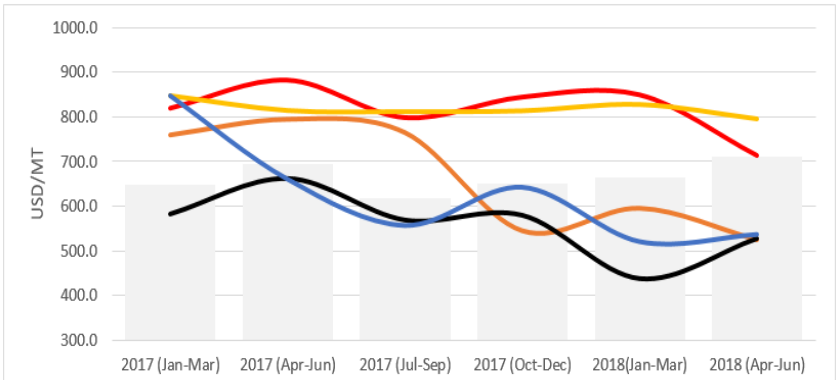
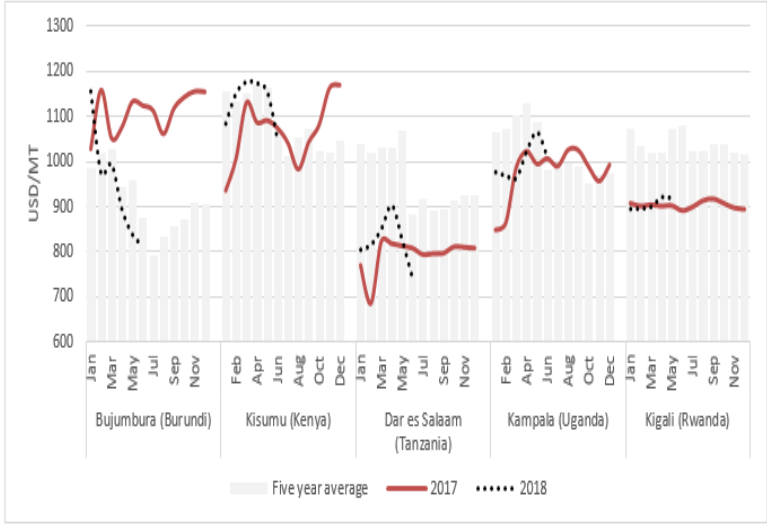


Figure 6: Quarterly and Five year average of Dry beans prices in production markets of East Africa. Source, RATIN



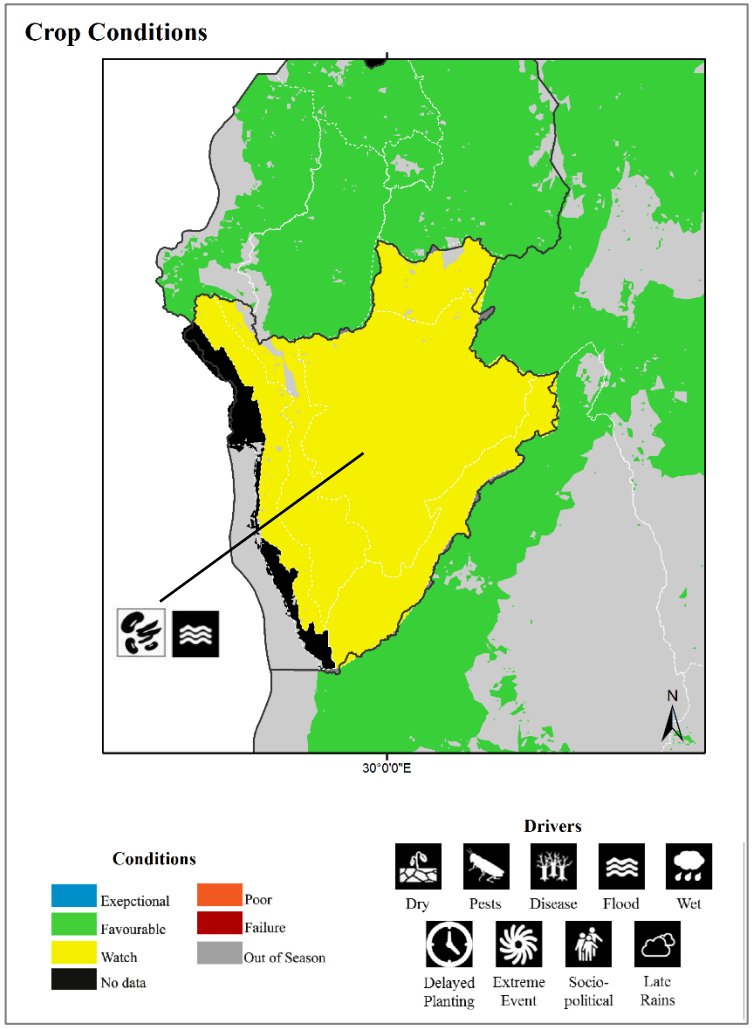
Rice: In ***Kenya***, rice was trading at USD 1046/MT in western markets in the second quarter and this was somewhat similar to the five-year average. Supply was stable with much of the commodity imported from Tanzania. In ***Rwanda***, prices were relatively stable compared to the previous quarter with a 2.4% marginal gain, however, the second wet season harvest (May-June) improved supply in the monitored markets with imports from Tanzania increasing significantly by 40% (5603MT). With both domestic and regional supply on the increase, prices will decline in the third quarter. In ***Tanzania***, prices eased with inbound stocks from the southern region. Rice from Mbeya averaged Tzs 2200/kg and from Morogoro, was trading Tzs 1850/Kg by close of the second quarter. Prices are expected to decline seasonally owing to above average harvest realized in the concluded season.

Figure 7: Rice prices in selected urban markets in East Africa. Source, RATIN



National Crop Conditions

Burundi



Crops:
Maize
Sorghum
Millet
Beans
Wheat
Rice
Teff
Barley

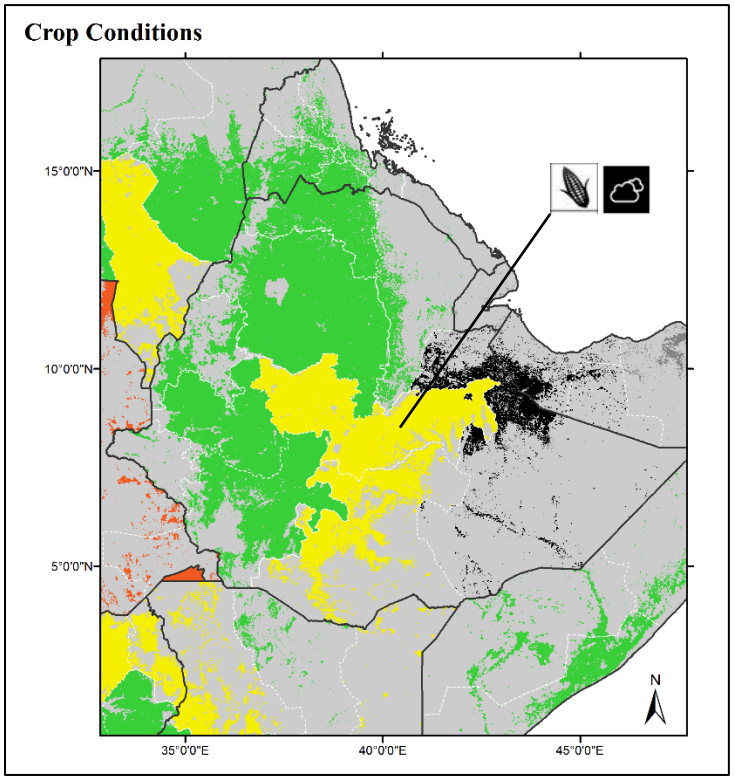
Bean crop damaged by Floods in Imbo Region

The crops production of the 2018B season has been influenced by rainfall. Legumes that are very sensitive to excessive rainfall have experienced a drop of about 10% compared to the 2017B production. The tubers, cereals (rice and sorghum) and bananas that best tolerate heavy rains increased by 10%, 4% and 4% respectively. The *Imbo* plain was the most affected by excessive rains, the production of legumes dropped by about 15% according to the Provisional IPC report, 2018B

The June July August (season C) in Burundi is climatology dry so the agricultural activities are conducted mainly in swamp areas where mainly vegetables (Irish potatoes, cabbage) are grown. Season C harvesting period is between November and December.

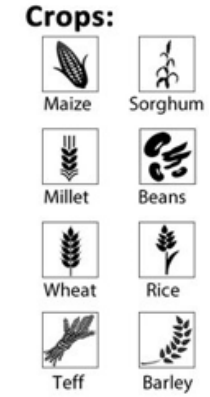
August marked the beginning of land preparation activities for coming OND cropping season.

Ethiopia

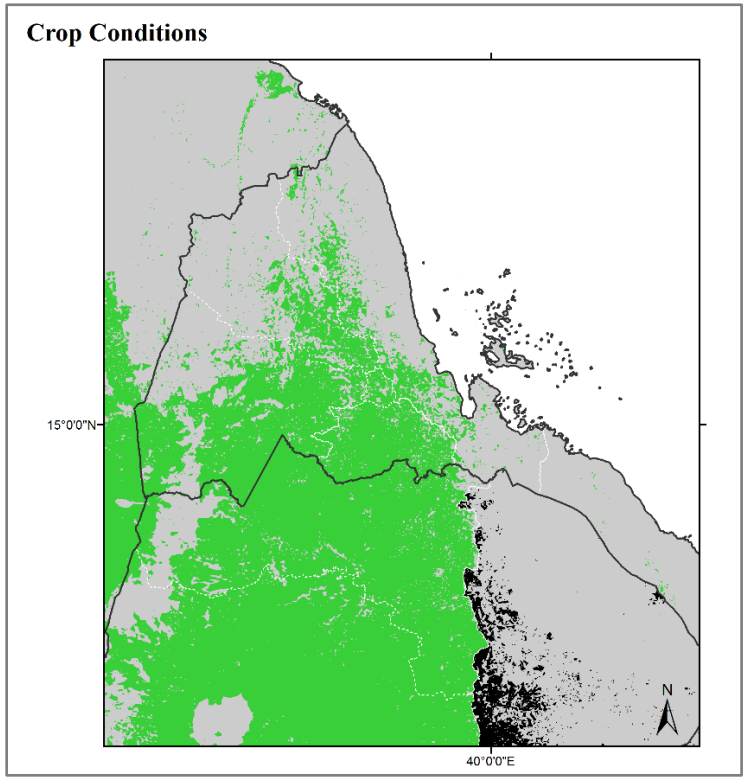


Ethiopia *Meher* season begun in June and most areas have received near normal *Kiremt* rainfall. Fall army worm infestation was controlled by farmers using mainly traditional interventions. Most crop areas the crop conditions are favorable.

Central *Oromia* and *Oromia* regions have however had dry conditions which were caused by late rains and this may affect the current maize crop.

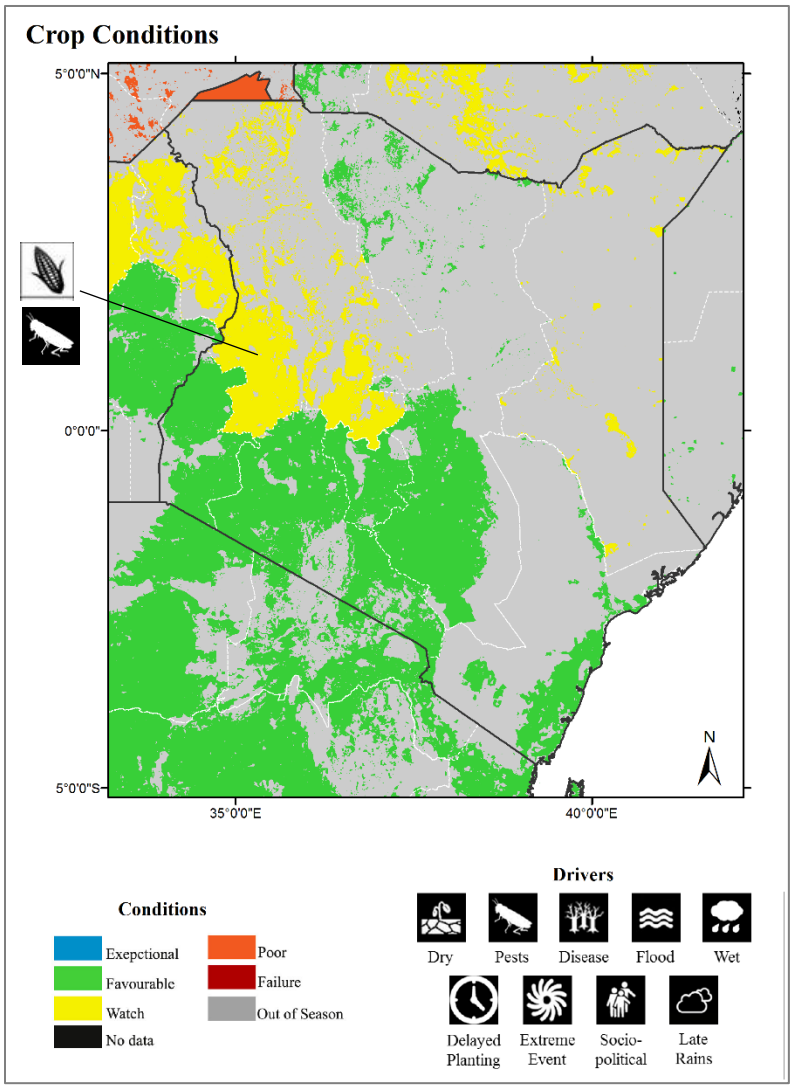


Eritrea



Eritrea: In *Maakel Zoba* there was a late onset of the *Kremti* rains but the distribution has been good. In *Anseba* and the *Gashbarka Zobas* the rain started early but ceased after the onset. The rains returned on third week of July. Early planters lost their crop but have replanted and the crop is favorable condition. The *Kremti* rain season (Jun-Sept) is in *Maekel, Debub, Gash Bark, Anseba* and parts of NRS zones.

Kenya



Kenya received good rainfall in the early months of the season which led to good maize crop. Limited cases of Fall Army Worm were reported in some areas but not significant to affect production.

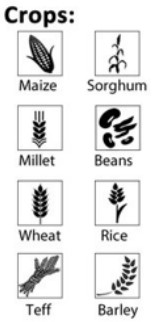
The heavy rains received in April-May however significantly reduced beans production and affected maize grown in the riverine crop areas of North Eastern and Coast regions.

The current crop conditions are good. Something interesting, even with reduced acreage due to flooding and FAW there was increase in yield per hectare hence above average production registered in Kitui, Tharaka, Kwale, Narok and Taita Taveta for maize.

Below average production for maize was registered in Embu, Makueni, Nyeri, Kilifi, Kajiado and Meru North.

Tree locust infestation has been reported in the northern range land areas of Samburu, Isiolo, Baringo and Marsabit. This will mainly affect pastoralism but the reduction of fodder for grazers may pose risk of animal grazing on crop lands.

Fall Army Worm Damage on Maize (Source: BBC)



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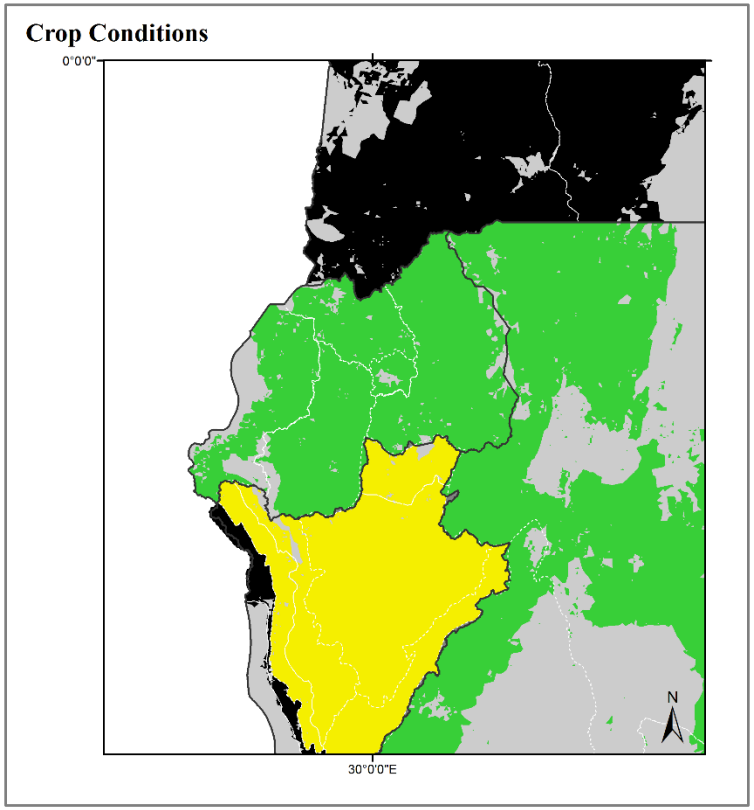
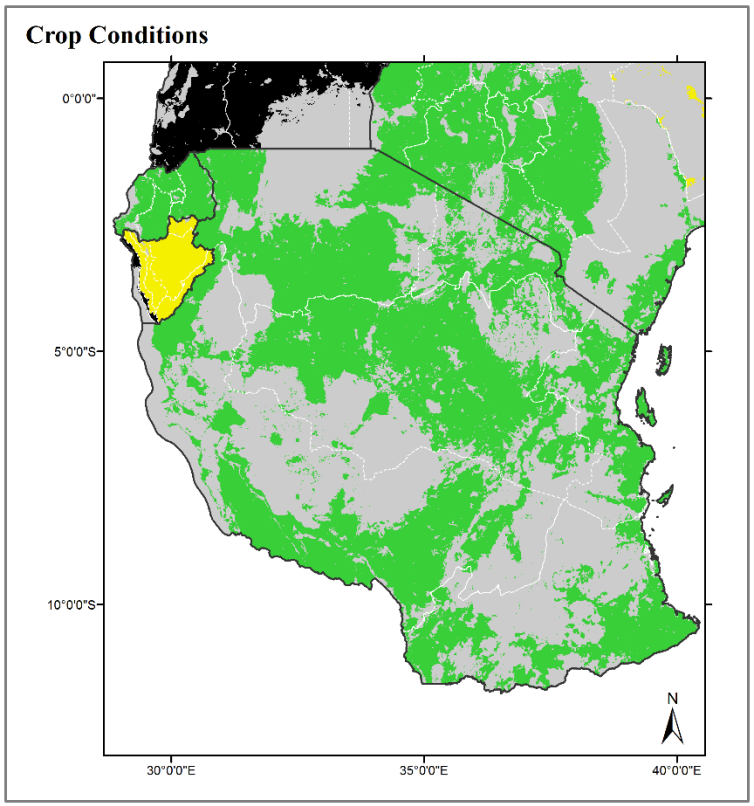
Rwanda



Crops:

Maize, Sorghum, Millet, Beans, Wheat, Rice, Teff, Barley

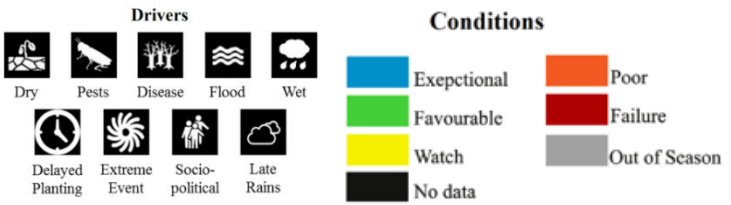
Tanzania



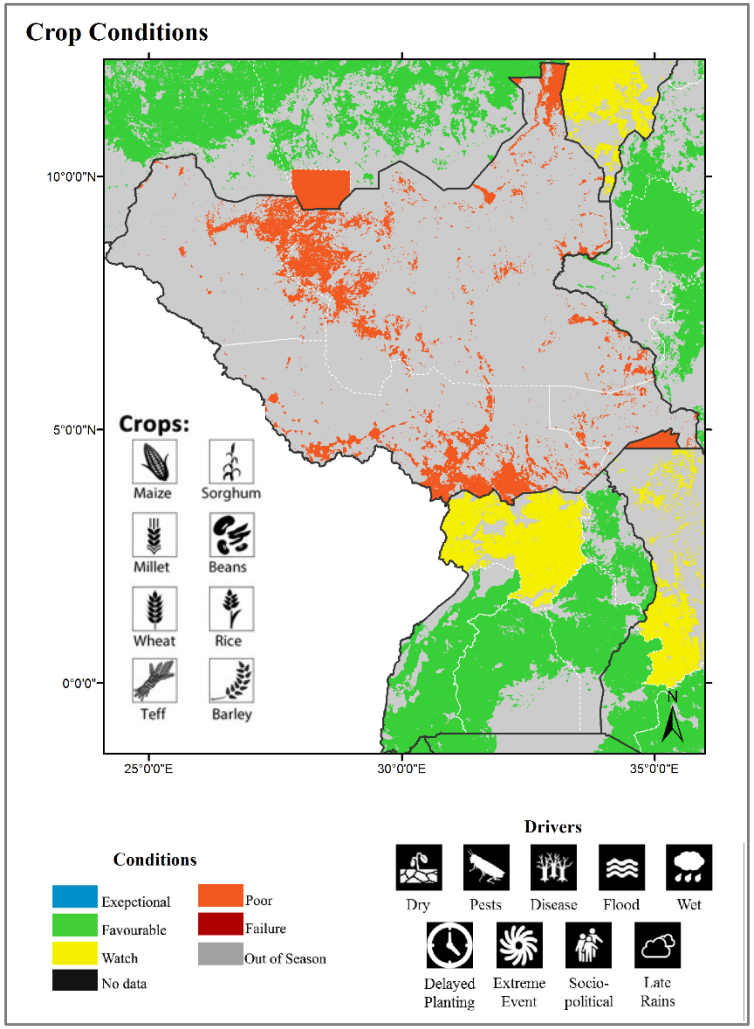
Rwanda maize, wheat, rice and beans have been planted and favorable conditions prevail on the growing crops. Early rains were experienced in late August.

Maize in Rwanda Nyaruguru District, Ruheru (Source: Ministry of Agriculture Rwanda)

Tanzania is in harvest period with favorable production of the main crops. Planting starts in October in the bimodal season areas of *Pwani* and *L.Victoria* regions and November in unimodal areas.



South Sudan



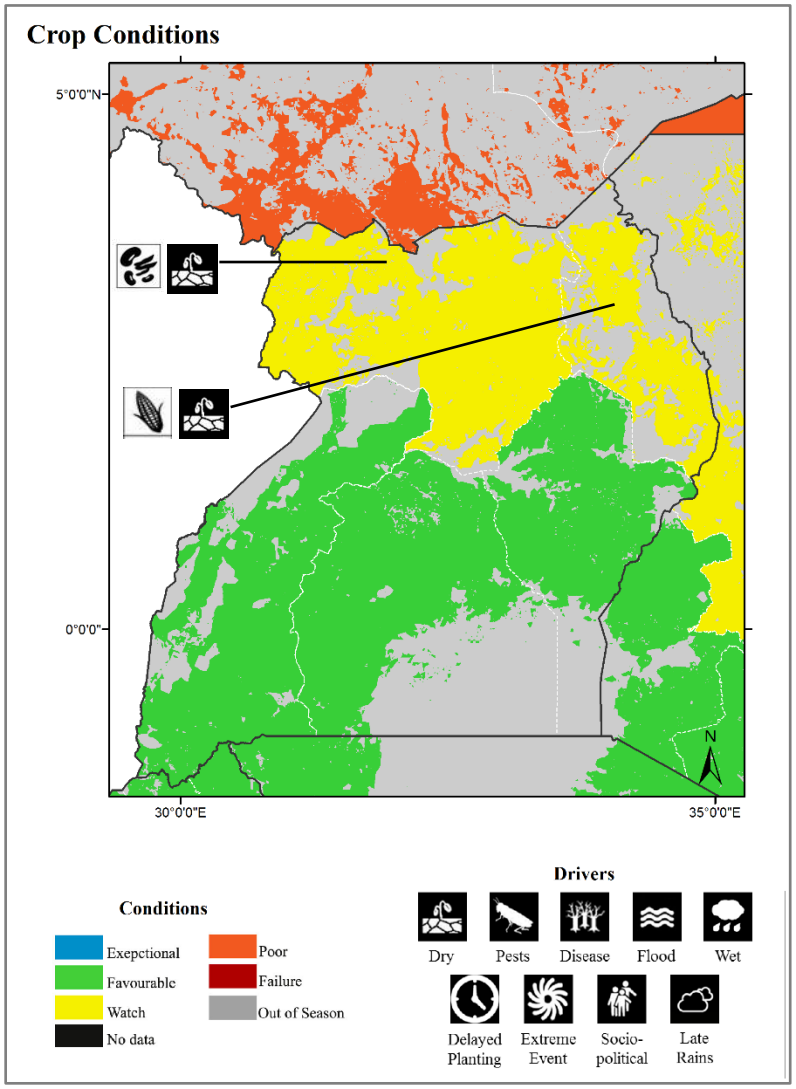
South Sudan in *Renk* and *Manyo* counties which produce majority of the sorghum crop have had conflict affect production with much production of other season crop happening in Bar Ghazal and Greater Equatorial.

Conflict affects crop production since most farmers are not able to tend to their farms, while others are displaced. Agricultural activities are limited to few areas and for subsistence kind.

Numbers of people Displaced South Sudan. (Source: Relief Web)

Conflict driven displacement is the leading cause of crop poor performance

Uganda



In bimodal **Uganda** above average cereals harvest was received. In North-eastern cropping areas of Karamoja, the season is unimodal and runs from late March to October. Cereal crops and cassava are generally performing poorly and significantly below average harvest is expected.

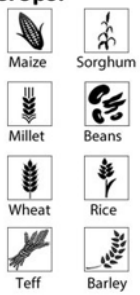
Seasonal rainfall commenced in August and agriculture activities (land preparation and planting) have commenced in parts of Central, southern and Western Uganda.

Field assessment in *Karamoja* sub region indicate that crops stunting and wilting initially due to flooding/water logging in the earlier months of the April-Sept followed by drier-than normal conditions in June/July. The area has a unimodal season.

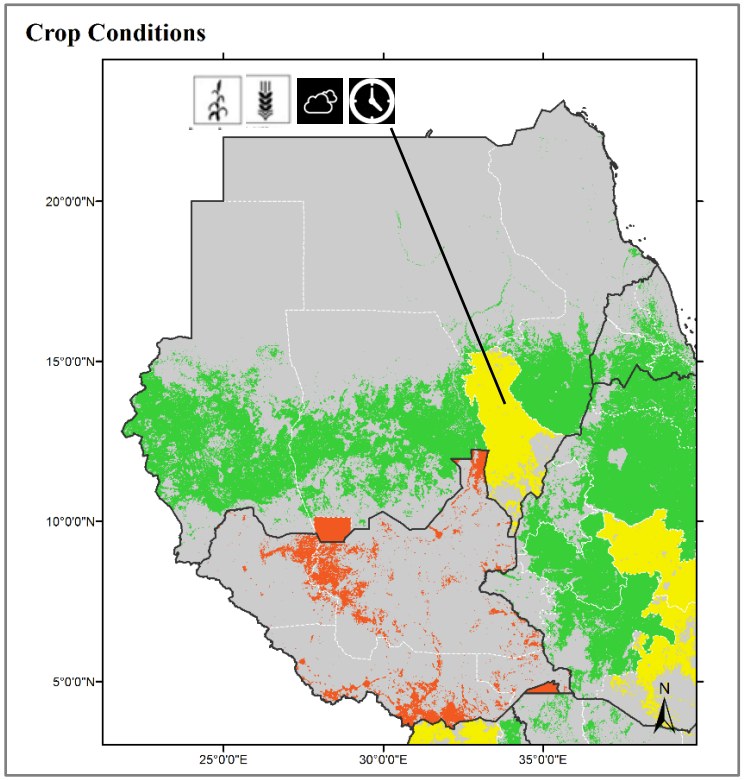
Field assessments show that many farmers abandoned matured maize in the field due to demotivation by the significantly low grain price offered to them at farm-gate. Some are ploughing back unharvested maize as they prepare for 2nd season's planting.

Above average harvest in all bi-modal areas; and it is anticipated to be below average across *Karamoja.*

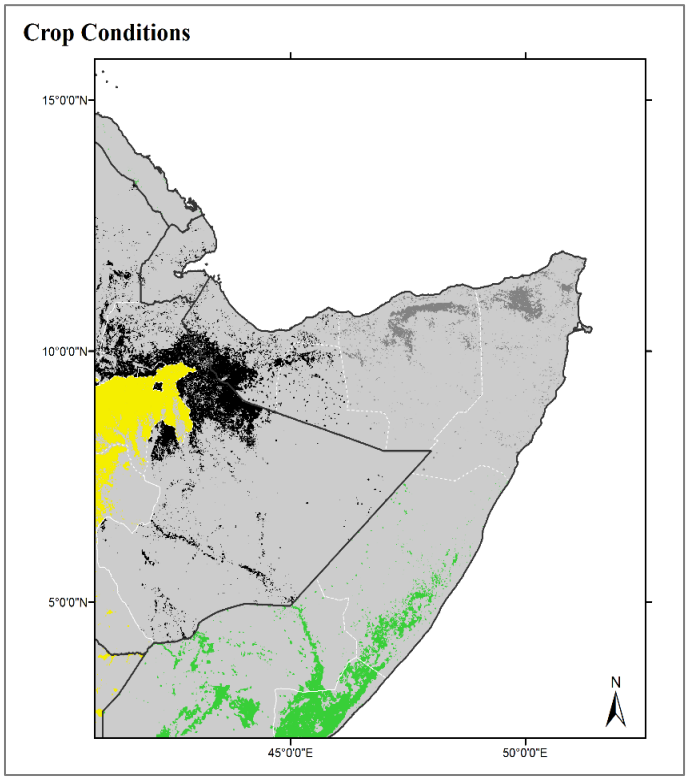
Crops:



Sudan

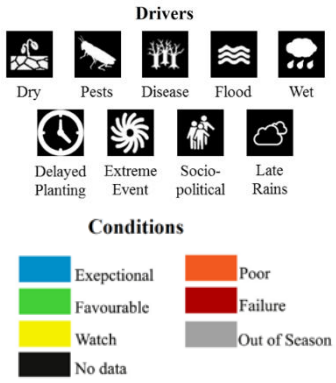


Somalia



Sudan planting of sorghum and millet was complete with some crop areas of *Kassala* and *Gederef* having received floods. There was no damage to crops.

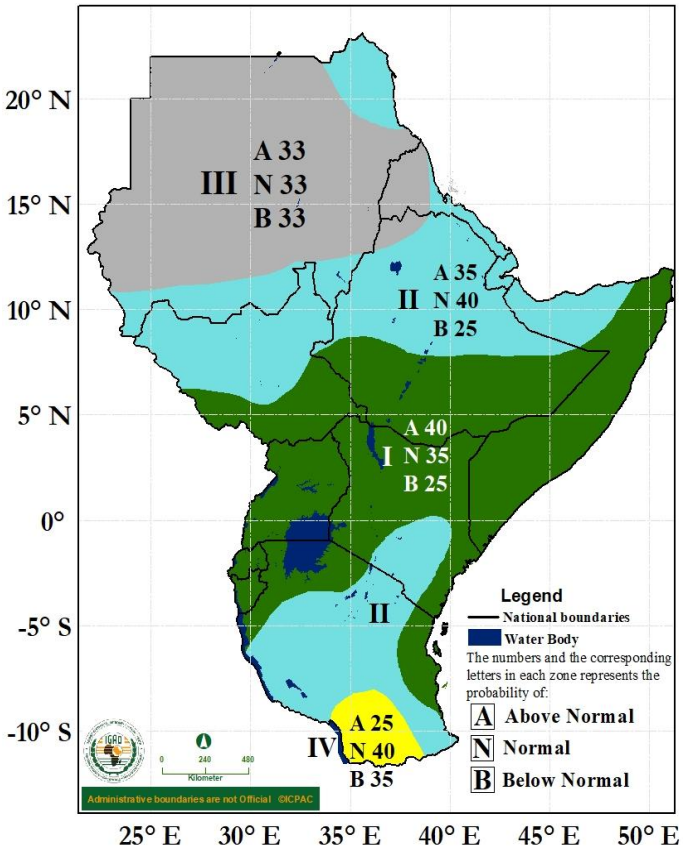
Delayed rainfall and that led to delay in planting was experienced in Blue Nile State, but this was in a minimal scale, which may not affect yield. The crops are generally under favorable conditions. Winter Crop wheat is sown in late October to Early November



Somalia Most of the crop were harvested in late July and early August in the Southern Somalia and were above average. However, flood recessional cultivation in riverine areas in *Hiran*, Middle *Shabelle*, *Gedo* and Lower and Middle *Juba* is continuing and are at vegetative and good condition, expected harvest will be in September/October. In northwest agro pastoral of *Woqoyi Galbeed* region, long cycle sorghum is at crop establishment stage and is at normal condition and will be harvested in November.

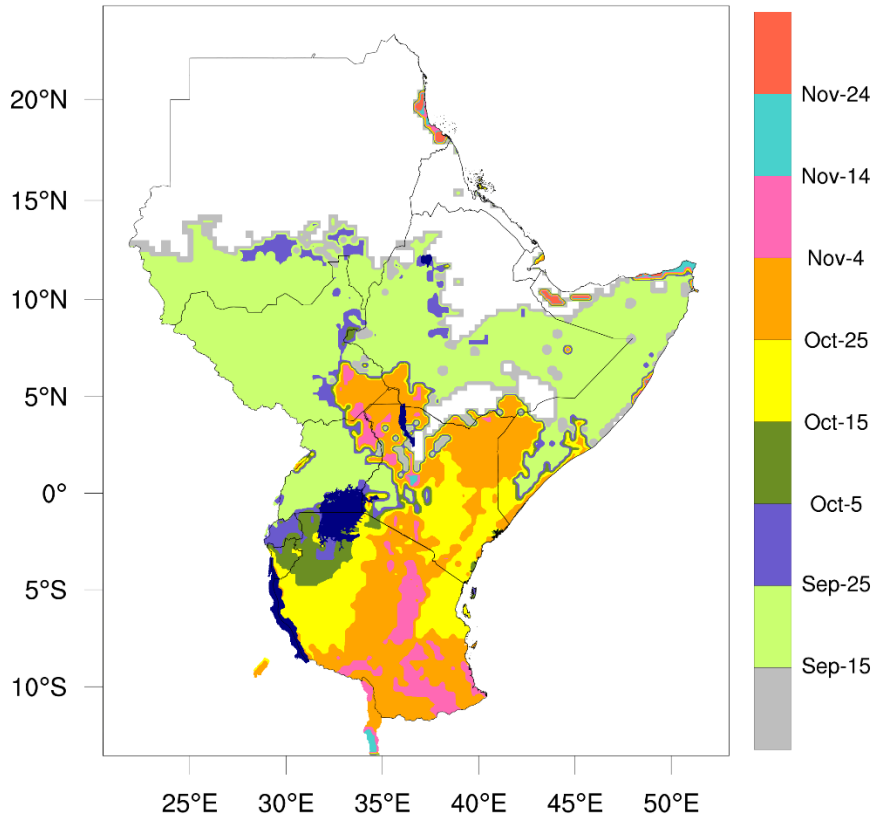
Climate Outlook and Impacts on Agriculture

Consensus Rainfall Outlook for October to December 2018 season



Zone I: Increased likelihood of above to near normal rainfall
Zone II: Increased likelihood of near to above normal rainfall
Zone III: Usually dry
Zone IV: Increased likelihood of near to below normal rainfall

Forecast Rainfall Onset Dates



The OND season forecast has most areas expecting early onset of rainfall. This can be used to plan for planting dates and farming implements in those areas where the season is yet to begin. Uganda, South Sudan, Ethiopia and Somalia are predicted to receive the earliest rainfall in September. Kenya and Tanzania is predicted to receive rains between Oct and Nov.

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Note:
In the map showing *Consensus Rainfall Outlook for October to December 2018* season, the numbers for each zone indicate the probabilities of rainfall in each of the three categories, above, near, and below-normal.

For example, in Zone II, there is a 35% probability of rainfall occurring in the above-normal category; a 40% probability of rainfall occurring in the near-normal category; and a 25% probability of rainfall occurring in the below-normal category.

Projected Impacts on Agriculture

	Positive	Negative	Mitigation
South Sudan			
Zone I	• Weather will be favorable for second season crop performance (Green belt) roots and cereals • Second season land preparation and planting is on-going • Reduce impact of FAW as the rainfall progresses • Early planting of second season crops with support from government and NGOs. • Improved crop production and productivity • Improve food security as more crops will be harvest	• Increased conflict between farmers and livestock owners as livestock will be returning home and destroying farm lands • Plenty of weeds –frequent weeding required • Farm labor force will be low	• Government enforcing livestock owners to be far from farming areas • Government trying to address insecurity situation to allow farmers return to farm lands
Zone II	• Near to above normal rainfall • Improve crop performance-production and productivity • Plenty of pasture and water for livestock • Plenty of fish as floods increases	• Flooding and displacement • Distraction of crops in the field by floods • Outbreak of Sudan dioch (quelea quelea) birds that feed on sorghum • Inaccessibility of most production areas due to deteriorating road conditions	• SSD and Sudan has agreement with DALCO company to combat the infestation of the birds • Government working with NGOs to control livestock and crop diseases • Extension services by government and NGO • Earlier prepositioning of food and air drops precaution.
Kenya			
Zone1	• .Normal to above normal rainfall • Water harvesting by the government in the country-expansion irrigable land within the country • Enhance crop yield through expansion of crop areas	• Increases in infestation of tree locust infestation	• Enhance strategies in terms of water harvesting and pest control and diseases in crops and livestock

	• Accumulation of pasture and water for livestock • Increase in own production by 50%	• Expected decline in crop planting due to already high crop stock with farmers	
Zone II	• Mostly wheat growing areas, rangeland, pasture and wild life • Enhance commercial pasture growth, wheat farming • Enough water and pasture for livestock • Reduce human and livestock/wildlife conflict	• People might be tempted to over stock which may result to less services for livestock if no plan is put in plan	• Education to livestock keepers to keep only a reasonable; livestock can be managed • Reduction in post-harvest loses
TANZANIA			
Zone 1	• Lake Victoria , northern coastal areas (both unimodal and bimodal areas-main staple crop • Flood expected to improve rice production	• Floods in low land areas which will affected maize due to water logging • Displacement of people due to floods resulting to loss of livelihood assets	• Need to create awareness on climate change to farmers by government • Inform farmers to do early planting to avoid flooding period • Prepare water dykes and canals
Zone II	• Increase production and productivity and enhance food availability	• Floods in lows leading to displacement, loss of lives and livelihood assets • Prevalence of pest and diseases	• Pest and diseases control • Early planting and planting of early maturity crops • Preparedness for flood
Zone IV	• Southern highland of Tanzania-Food basket of Tanzania • Normal harvesting expected • Food production expected to be with surplus	• Likelihood of reduce crop harvest in the area • Expected more pest and crop diseases in areas if there is drought **All zones: majority of farmers are women: Women will be most affected.**	• Water harvesting • Use of drought tolerance varieties
SUDAN			
Zone II	• Plenty of water in rangeland • Expected early harvest resulting to low food prices • Harvest of cash crops improve income of farmers and their food security situation	• Small scale producers will not be able to cover cost of production	• Government subsidize food production cost and
RWANDA			

Zone I	• Main agriculture season • Grow, maize, rice, beans, potatoes and cassava • Well preparedness for the season • High production is expected if the rainfall remain good • Enhance afforestation and re-forestation • Enhance cash crop planting (tea and coffee)	• expected in low lands affecting crops and livestock (North, West, Eastern) floods • Heavy rains will affected rice at flowering stage reducing production • Late on-set will have negative impact on land-El Nino will result to landslide and affect crop post-harvest performance • If distribution of rainfall is low then food security will decrease	• Government ensure agro-dealers have seeds and fertilizers to give to farmers when required • Presence of strategic grain reserve • Ministry of Agriculture support farmers who have no seeds with seeds
BURUNDI			
Zone I	• Main cultivation season • Early planting of staple food crops • Improvement in crop performance if rainfall distribution is good • Pasture and water improvement for livestock • Low post harvest losses when rainfall is normal to below normal • Food security expected to improve with improve crop performance and harvest-	• Flooding in low land areas destroying crops and causing displacement • Landslides in high lands resulting to soil erosion and destroying irrigation systems • Increase incidence of pest and diseases	• Awareness on soil erosion contrail measures • Water harvesting and storage • Crop diversification • Storage of fodder for livestock
ETHIOPIA			
Zone I	• OND is a dry period for most part of Ethiopia • Southern and South Eastern part is the second rainy season • Perennial plants performance improve • Pasture and water available for livestock • In drier area (water stress areas) water harvest and storage practiced	• Enhance rainfall may interrupt post-harvest activity • Flood related disasters in low-lands and landslides may also occur	• Early harvesting of fully mature crops • Develop structures to control floods (dykes, canals etc.) • Soil and water conservation practices
Zone II	• Most areas harvesting crops • Improvement in food security	• Rainfall will disrupt harvest of cereals • Post-harvest pest and diseases will increase	• Provision of weather information to farmers • Pest and diseases control • Early harvesting crops
DJIBOUTI			
Zone II	• Main rainy season in Coastal area • Cold season - increase production of vegetables • Reduction in crops and vegetables prices hence improve food security • Positive impact on gender, agriculture and market	• Poor pasture in rural areas for livestock	• Food distribution to rural population • Seeds and tools distribution to farmers

Definitions

Crop Conditions:

Exceptional: Conditions are much better than average* at time of reporting. This label is only used during the grain-filling through harvest stages.

Favourable: Conditions range from slightly lower to slightly better than average* at reporting time.

Watch: Conditions are not far from average* but there is a potential risk to final production. The crop can still recover to average or near average conditions if the ground situation improves. This label is only used during the planting-early vegetative and the vegetative-reproductive stages.

Poor: Crop conditions are well below average. Crop yields are likely to be 10-25% below average. This is used when crops are stunted and are not likely to recover, and impact on production is likely.

Failure: Crop conditions are extremely poor. Crop yields are likely to be 25% or more below average.

Out of Season: Crops are not currently planted or in development during this time.

No Data: No reliable source of data is available at this time.

"Average" refers to the average conditions over the past 5 years.

Drivers:

These represent the key climatic drivers that are having an impact on crop condition status. They result in production impacts and can act as either positive or negative drivers of crop conditions.

Wet: Higher than average wetness.

Dry: Drier than average.

Hot: Hotter than average.

Cool: Cooler than average or risk of frost damage.

Extreme Events: This is a catch-all for all other climate risks (i.e. hurricane, typhoon, frost, hail, winterkill, wind damage, etc.)

Delayed-Onset: Late start of the season.

Pest & Disease: Destructive insects, birds, animals, or plant disease.

Socio-economic: Social or economic factors that impact crop conditions (i.e. policy changes, agricultural subsidies, government intervention, etc.)

Conflict: Armed conflict or civil unrest that is preventing the planting, working, or harvesting of the fields by the farmers.

ICPAC

ICPAC
IGAD Climate Prediction & Applications Centre

Crop Monitor ICPAC

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