



Ministry of Agriculture  
Agricultural Marketing Section

## EXECUTIVE SUMMARY

Staple food prices declined in April, though they remained at their highest levels since last year and the five-year average. Between March and April, prices for maize, sorghum, and beans decreased by 8, 4, and 3 percent, respectively, while rice prices remained relatively stable. Improved seasonal rains increase the likelihood for good harvests in the majority of producing regions. Early harvesting of crops like beans and maize has improved supply of food crops. Food prices are forecasted to ease as the country approaches the harvesting season. International commodity prices declined and other commodities remained broadly stable in the first quarter of 2023 (except tobacco) owing to improved trade flows and improved weather conditions. Tanzania's traditional export crops value has reached USD Mil 758 for the fiscal year ending March 2023 with cashewnut (USD Mil 199), coffee (USD Mil 181), tobacco (USD Mil 173), and cotton (USD Mil 108) being the leading commodities. On the hand, import bill for wheat, edible oil, and fertilizer for the same period was USD, Mil 340, USD Mil 152, and USD Mil 622 respectively. Tanzania has an advantage in increasing commodity exports and reducing imports by improving production of edible oil, wheat, and fertilizer.

# MONTHLY MARKET BULLETIN

April, 2023

## I. DOMESTIC MARKET PRICES: STAPLE FOODS

Prices for major staple food crops increased and decreased at different rates in April than a month prior but remain significantly high in comparison to the previous year and to the five-year average (Table 1). In April, decrease in price was observed in maize (8.3%), sorghum (3.8%) and dry beans (3.2%), while price of wheat, round potatoes, and rice slightly increased by 5.5%, 2.9%, and 0.5% respectively.

Table 1: National average market price of major staple foods (TZS/100kg)

Commodity	Mar 2023	Apr 2023	Monthly change (%)	Annual change (%)	5-year average (%)
Maize	119,800	109,800	▼ 8.3	▲ 74.0	▲ 64.9
Rice	294,800	296,200	▲ 0.5	▲ 57.4	▲ 52.9
Dry beans	287,100	277,900	▼ 3.2	▲ 49.9	▲ 41.5
Sorghum	159,400	153,400	▼ 3.8	▲ 31.7	▲ 37.0
Round potatoes	98,000	99,600	▲ 1.6	▲ 30.9	▲ 29.6
Wheat	206,700	218,100	▲ 5.5	▲ 25.9	▲ 43.2



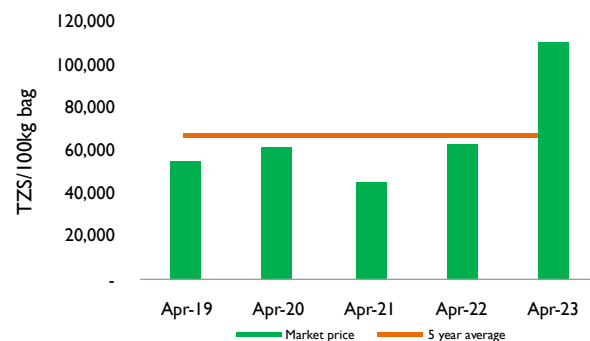
<sup>1</sup> B0T-Monthly Economic Review, April 2023

## Maize

In April, the average wholesale price declined 8.3 percent, from TZS 119,800/100kg bag in March to TZS 109,800/100kg bag in April (Table 1). Despite the April price decrease, maize prices remained 74% and 65% higher than the previous year's comparable month and the five-year April averages, respectively (Figure 1). Prices have begun to ease as a result of improved supply from ongoing early-season harvesting in various production areas.



Figure 1: Average market price of maize in April 2019 - 2023

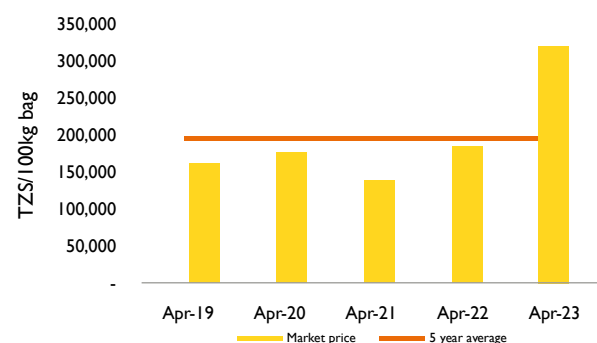


## Rice

Rice prices increased marginally by 0.5 percent in April, rising from TZS 294,800/100kg bag in March to TZS 296,200/100kg bag in April (Table 1). Similarly, prices increased by 57.4% in April compared to the previous year's same month, and by 52.9% compared to the five-year April average (Figure 2).



Figure 2: Average market price of rice in April 2019 - 2023

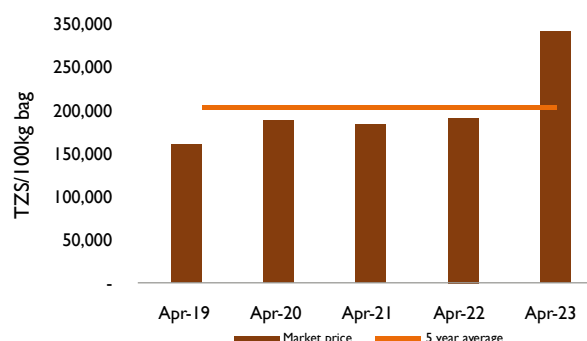


## Dry beans

Beans prices decreased by 3.2 percent in April, from TZS 287,000 /100kg bag to about TZS 281,000/100kg bag. Price trend shows a decline in prices over the past three months. This could be due to improved supply from various production areas. However, prices in April remained significantly higher by about 50% and 42% than similar month previous year and the five-year April average, respectively (Figure 3).



Figure 3: Average market price of beans in April 2019 - 2023



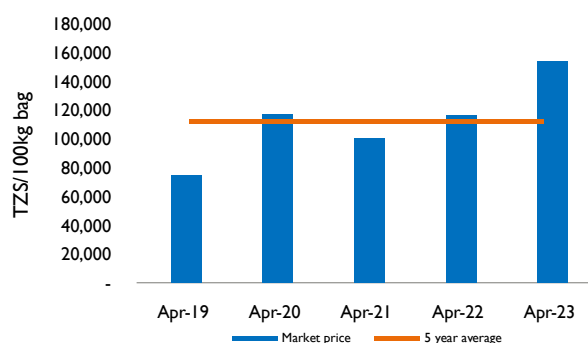


## Sorghum

The monthly average wholesale price of sorghum fell by 3.8 percent in April, declining from TZS 159,400/100kg bag in March to TZS 153,400/100kg bag in April. However, prices remained higher at 31.7% in April compared to the same month the previous year, and were 37% higher than the five-year April average. (Figure 4).



Figure 4: Average market price of sorghum in April 2019 - 2023

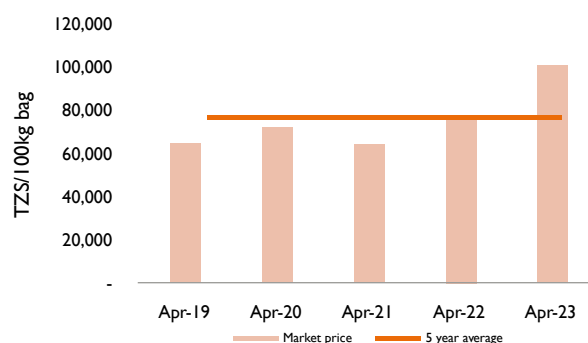


## Round potatoes

In April, round potato wholesale prices slightly increased by 1.6 percent, from TZS 98,000/100kg bag in March to TZS 99,600/100kg bag in April. Similarly, prices remained 30.9% higher in the reporting period compared to the same period the previous year, and 29.6% higher than the five-year April average (Figure 5). Prices are expected to ease as most producing regions harvest potato between March and June.



Figure 5: Average market price of round potatoes in April 2019 - 2023

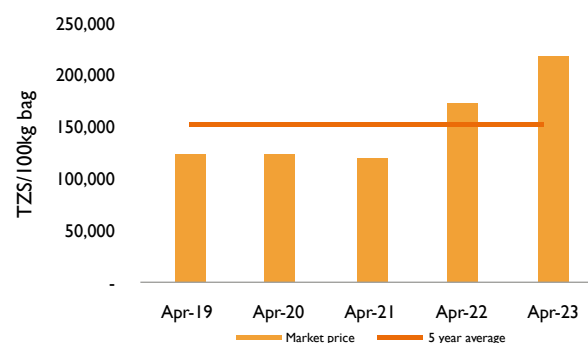


## Wheat

Wheat grain wholesale prices increased by 5.5 percent in April, from TZS 206,700/100kg bag in March to TZS 218,100/100kg bag in April. Prices, on the other hand, were 25.9% higher in the reporting period compared to the same period the previous year, and 43.5% higher than the five-year April average (Figure 6).



Figure 6: Average market price of wheat during month of April 2019 - 2023



## NOTES

Market price: Refer to nominal or observable prices

Price level: National average wholesale price in Tanzanian Shilling (TZS) per 100kg bag

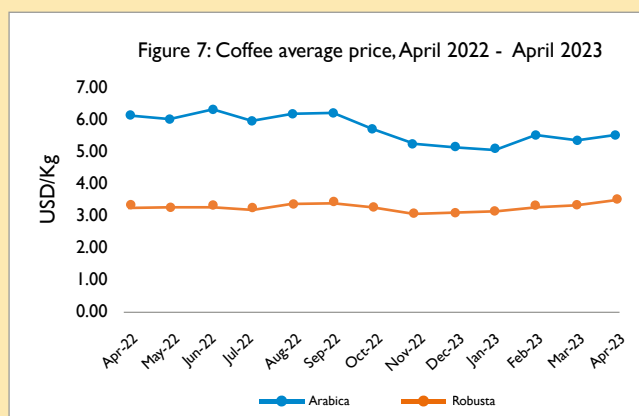
The symbols (▲ ▼ ►) indicate the direction of price changes. (▲) price increased; (▼) price decreased; (►) no changes in price

Source of data: Ministry of Investment, Industry and Trade

## 2. GLOBAL PRICES:TRADITIONAL EXPORT COMMODITIES (Source:World Bank, 2023)

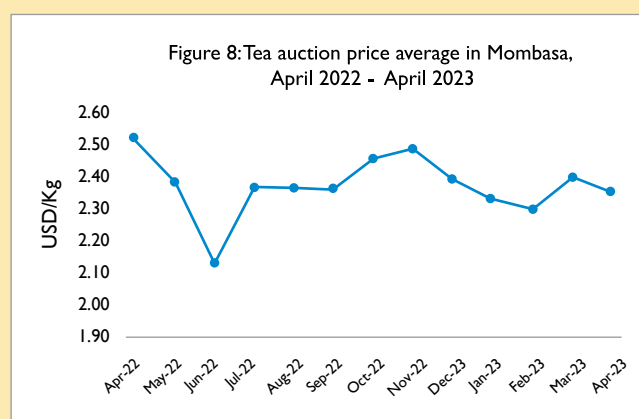
### Coffee

Arabica prices increased by 3.2 percent but remained lower than they were a year ago. In Nov, Robusta prices increased by 8.6 percent (Figure 7). After a rebound from a decline caused by adverse weather conditions, global coffee production is expected to rise, particularly in Brazil. Consequently, prices are expected to fall slightly as a result of increased production ([World Bank, 2023](#)).



### Tea

Despite the slight increase in March 2023, international tea prices have been declining for the last three months. Prices at the Mombasa auction market have slightly decreased by 2 percent in April, compared to their prices in March, from USD 2.40/kg in March 2023 to USD 2.35/kg in April 2023 (Figure 8). The decline in prices is linked to weak demand in key tea-consuming regions, particularly in Central Asia, as a result of the Ukraine conflict. Weak demand is expected to put prices at lower levels throughout 2023 ([World Bank, 2023](#)).



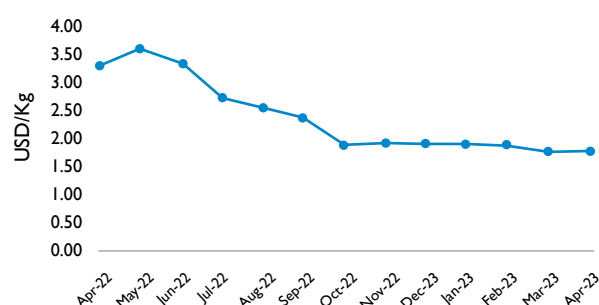
Benchmark: Tea (Mombasa/Nairobi auctions), African origin, all tea, arithmetic average of weekly



## Cotton

Global cotton prices have risen over the last year, peaked in May 2022, and then dropped significantly in the months that followed. Prices in April 2023 remain unchanged at 2.1 USD/kg as they did the previous month. Global consumption of cotton has weakened recently causing a decline in prices. Because of global production dynamics, prices are projected to trend low in 2023, and pick up again in 2024. ([World Bank, 2023](#)).

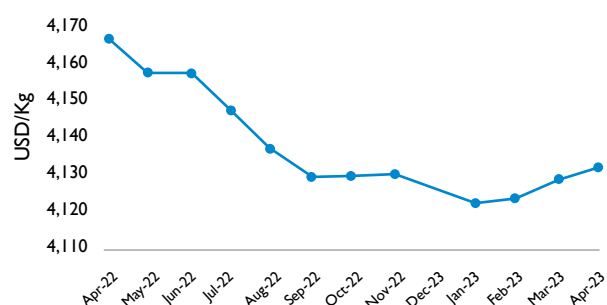
Figure 9: Cotton average price, April 2022 - April 2023



## Tobacco

Over the last year, global tobacco prices have been steadily declining (Figure 10). Prices picked up in February increasing slightly by 0.067% in April, from 4136.73USD/ton in March 2023 to 4139.49USD/ton in April. The increase in prices for tobacco is owed to the global increase in tax rates for tobacco products. The increase in tax rates is aimed at increasing government revenues but also reducing smoking prevalence that causes harm particularly to the youth and low income families. In 2023 for instance, UK increased the duty rate on all tobacco products by 2% above the Retail Price Index (RPI) inflation. Indonesia increased her taxation by 10% and Mexico by 8%.

Figure 10: Tobacco average price, April 2022 - April 2023



- <https://tobaeconomics.org/blog/2023-brings-tobacco-tax-increases-around-the-world/>
- <https://www.gov.uk/government/publications/tobacco-duty-changes-to-rates/changes-to-tobacco-duty-rates-from-15-march-2023>



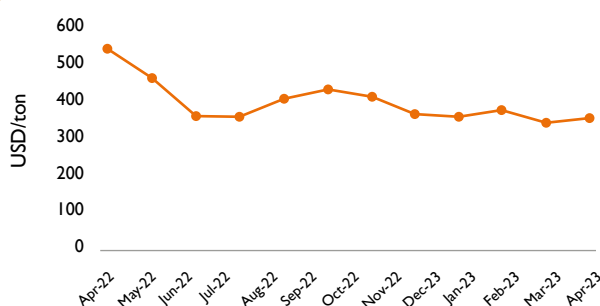
### 3. IMPORT SUBSTITUTION COMMODITIES (Source:World Bank, 2023)

#### Wheat

Ukraine and Russia account for nearly 30% of global wheat exports. Following several months of Russia's invasion of Ukraine, prices of wheat have soared. However, wheat observed a decline in prices from their pick in May 2022 reflecting improved supply prices (Figure 10). Tanzania imports about 90% of domestic wheat requirement. Wheat import bill increased from USD Mil 250 in 2022 to USD mil 340 in the fiscal year ending March, 2023 (BoT, 2023).



Figure 11: Wheat average price, April 2022 - April 2023



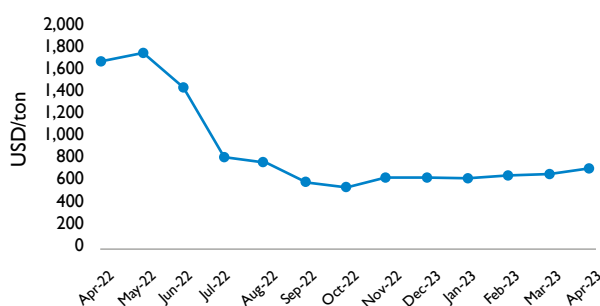
\*Wheat (US), hard red winter (HRW)

#### Edible Oil (Palm)

The price of palm oil fell sharply from its peak in May 2022 to its lowest level in October, then remained relatively stable throughout. Palm oil prices increased marginally by 3.41 percent in April 2023, from USD 972.06/ton in March 2023 to USD 1005.24/ton in April (Figure 11). The increase in prices for global palm oil could have resulted from the increased prices of crude oil in Malaysia but also high local demand for palm oil in the country. Source: <https://tradingeconomics.com/commodity/palm-oil>. Tanzania imports a large amount of edible oil. For the fiscal year ending March 2023, the import bill was USD mil 152 (BoT, 2023).



Figure 12: Palm oil average price, April 2022 - April 2023



Ref: Palm oil (Malaysia), palm oil demand and supply outlook report 2022.

<sup>1</sup> BoT-Monthly Economic Review, April 2023

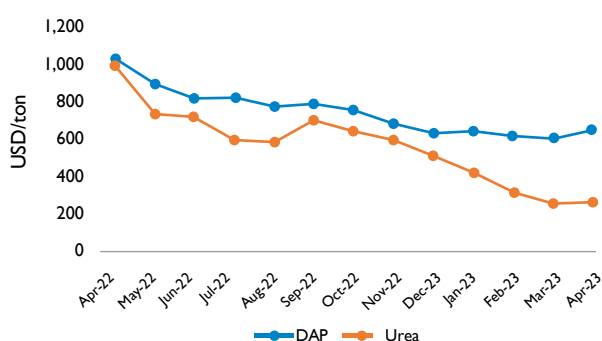
#### 4. FARM INPUTS (Source: World Bank, 2023)

##### Fertilizer

Both Urea and DAP fertilizers recorded a steady decline in price from their pick in April 2022. In April, a slight increase of 5 percent in DAP prices was observed while a Urea remained fairly stable from prices recorded in March (Figure 13). International prices are expected to continue declining as natural gas prices fall. Tanzania imports about 90% of its fertiliser's annual requirement. The fertilizer subsidy program, which is currently in effect, is expected to lower production costs and increase farm yield.



Figure 13: Fertilizer average price, April 2022 - April 2023



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### **About the Bulletin**

This bulletin provides domestic and international markets outlook for five commodity groups including **staples** (maize, rice, beans, sorghum, and round potatoes); **traditional export crops** (coffee, cotton, tea, tobacco, and cashew nut); **import substitution commodities** (edible oil, and wheat) and **farm inputs** (fertilizer and seed). The information in this bulletin serves as a reference point for key players along the respective value chain to make informed decisions.

**Disclaimer:** This bulletin is strictly for informational purposes only. The authors have made every effort to ensure accuracy of information provided; however, neither the Ministry of Agriculture nor the authors can guarantee such accuracy.