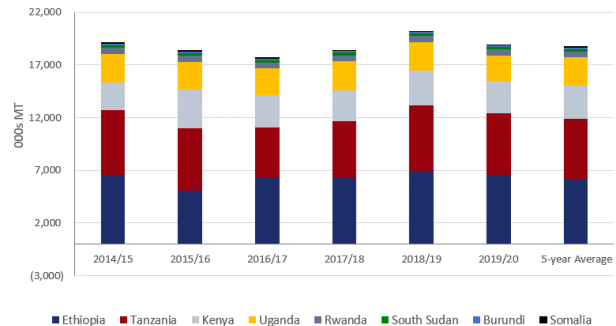


KEY MESSAGES

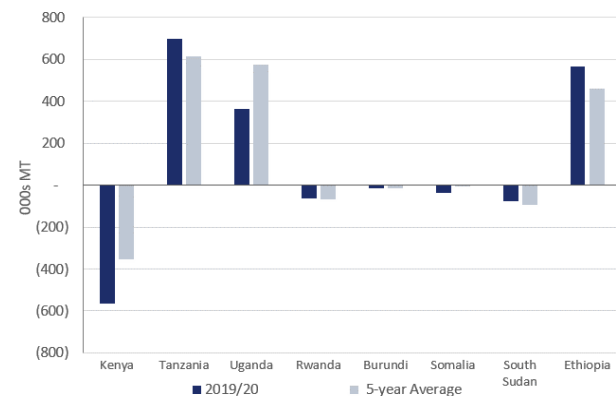
- Maize, wheat, rice and, and sorghum are important staple foods in East Africa. Domestic maize production contributes over 50 percent of national grain supply in Burundi, Rwanda, Kenya, Tanzania and Uganda. Maize contributes to relatively less in Ethiopia, Somalia, and South Sudan, ranging from nine to 33 percent.
- This report summarizes the supply and market outlook for maize in [Tanzania](#), [Uganda](#), Ethiopia, Kenya, Somalia, South Sudan, Rwanda and Burundi for the 2019/20 marketing year (MY), spanning from July 2019 to June 2020. This includes two main harvests, one spanning from May to August 2019 and another from October 2019 to February 2020. While the May-to-August production data reflect post-harvest estimates, the October-to-February data are early estimates and may be updated as post-harvest estimates are available.
- Preliminary estimates suggest that 2019/20 production in the structurally-surplus countries of Tanzania and Uganda was lower than 2018/19 (**Figure 1**). While production in Tanzania was similar to average, Uganda's production was nine percent below average. Harvests in import-dependent Kenya and Somalia are lower than 2018/19, with Somalia's production significantly lower than average. Production in Burundi is above average. Production is average elsewhere in the region (**Annex 1**).
- After accounting for domestic requirements, aggregate regional exportable maize surpluses will be 18 percent below average. Tanzania and Ethiopia are expected to have above-average exportable maize surpluses (**Figure 2**), while Uganda will have a below average surplus. Kenya and South Sudan will have above average import gaps that will be filled through imports from regional markets. Maize prices are expected to remain above average regionwide. This will constrain export opportunities to central and southern Africa (e.g. the DRC and Malawi). The region will continue to import wheat and rice from well supplied international markets (**Annex 2** and **Annex 3**).
- The regional maize market is expected to be tight and prices will remain high. Market-based response activities involving maize and substitute commodities should consider the projected market and trade dynamics presented in this report.

Figure 1. Regional Maize Production estimates (000s MT)



Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

Figure 2. Regional Maize Balance (000s MT)



Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

FEWS NET monitors trends in staple food supply and price trends in countries at risk of food insecurity. **The Regional Supply and Market Outlook** report provides a summary of regional staple food availability, surpluses and deficits during the current marketing year, projected price behavior, implications for local and regional commodity procurement, and essential market monitoring indicators. FEWS NET gratefully acknowledges partner organizations, national ministries of agriculture, national market information systems, regional organizations, and others for their assistance in providing the harvest estimates, commodity balance sheets, as well as trade and price data used in this report.

CURRENT MARKET TRENDS

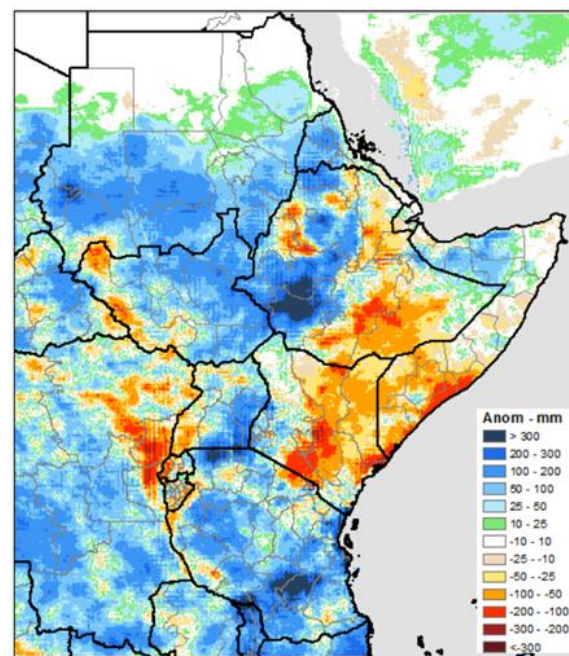
Aggregate cereal production

- The agro-climatology context in East Africa varied considerably in 2019. Cumulative rainfall between February and September 2019 was average to below-average in western Uganda, South Sudan, and eastern Ethiopia, parts of northern Kenya, Tanzania and Ethiopia, southern and southeastern Ethiopia and Somalia (**Figure 3**). Rainfall was significantly below average in southwestern, western and parts of northern Uganda; and southern Somalia between March and April during the March-to-May production season. Although rainfall increased in late April and early May it was not adequate to alleviate local drought conditions. This adversely affected the recent June-to-July harvests, resulting in below average cereal production in Uganda and Somalia during two consecutive seasons.
- Although there was a poor start of the May-to-October season in Kenya, South Sudan, and Ethiopia, rainfall performance improved subsequently, resulting in average to above-average grain production. Total regional grain production (maize, barley, wheat, millet, sorghum and teff) is estimated to be around 49 million MT, similar to the recent five-year average.

Maize

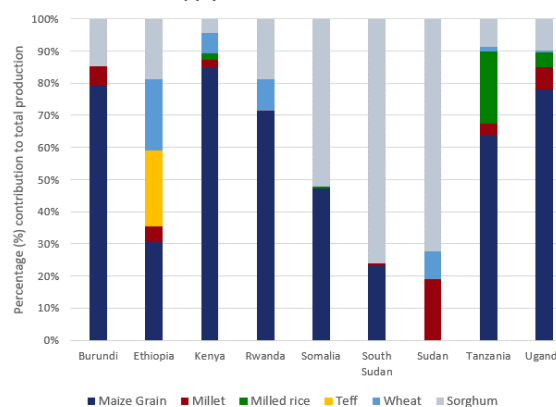
- Domestic maize production plays an important role in maize supply in East Africa (**Figure 4**). East Africa as a region usually produces a one million MT tradeable surplus (**Annex 1**). Maize imports from international markets are rare, but do take place, especially when there are restrictions on inter-regional trade or when production is uncertain or well below average in the surplus producing countries of Tanzania and Uganda.
- Total regional maize production is anticipated at around 19 million MT, six percent lower than in 2018/2019 but similar to recent five-year average levels (**Figure 1**).
- Around 191,500 MT of maize was traded in the region during the third quarter of 2019 (July-to-September). The volume traded was higher than the second quarter and similar to the same quarter last year, but 26 percent lower than the recent five-year average. Uganda and Tanzania accounted for 72 and 27 of the total regional exports, respectively. Kenya and South Sudan accounted for 70 and 21 percent of imports, respectively. Increased trade since the previous quarter was attributed to higher outflows from Uganda to Kenya as traders offloaded stocks into the market to get better returns before prices start declining with increased supplies from the October-to-December harvest in Kenya (**Figure 8** and **Figure 9**).
- Although exports from Uganda to South Sudan were stable between the second and third quarters, the volumes were higher than last year (84 percent) and recent five-year average (47 percent) because of relative calm that continued to be observed in most parts of South Sudan, despite slow implementation of critical aspects of the signed peace deal. This

Figure 3. Rainfall Accumulation between February to September 2019 Season compared to 30-year average



Source: FEWS NET estimates based on CHIRPS data

Figure 4. Contribution of Maize Production to Aggregate Domestic Grain Supply in East Africa



Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

Tranquility has enhanced market functioning and enabled traders to operate freely across most parts of the country except in some localized areas in Northern Bahr El Ghazel. Trade flows were ongoing along key marketing corridors such as Nimule-Juba, Juba-Bor, Juba-Yei, Juba-Rumbek in Greater Equatoria region; Ameit-Wau-Raga and Sudan-Warwar to Aweil in Greater Bahr el Ghazal region and Sudan to Fashoda-Tonga-Adok in Leer via river; Ethiopia-through Kuergeng to Paga of Maiwut of Greater Upper Nile region.

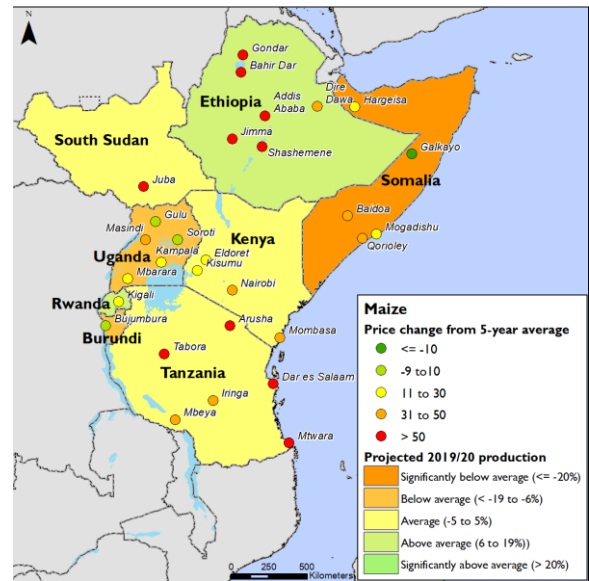
- As prices rose seasonably across most markets in Tanzania as result of high domestic and regional demand, Tanzania’s northwestern greater Bukoba region attracted imports from Uganda because of proximity and low transport costs compared to supplies from the main producing southern regions of Tanzania. Seasonal exports from Tanzania to Burundi also increased. Exports from Tanzania to Rwanda remained stable at higher levels as maize from Tanzania and also Zambia continued to replace supplies from Uganda following the closure of some borders between Uganda and Rwanda in March 2019.
- Maize prices in Ethiopia remained stable at high levels at the peak of the October-to-September lean season when there is high market demand. The prices were declining in Kenya, Somalia, and South Sudan because of availability from June harvest, green consumption, imminent start or ongoing harvest (Figure 9). The prices were on an increasing trajectory in Tanzania and Uganda as supplies tightened amid high domestic and regional demand before the next harvest in December 2019 and May 2020 respectively (Figure 8). Maize price trends (expressed in US dollars per MT) were relatively higher in structurally-deficit Kenya, South Sudan, Rwanda, and Burundi contributing to observed trade flows patterns.
- Persistent currency depreciation and high inflation have contributed to elevated staple grain prices in Sudan, South Sudan and Ethiopia (Figure 5). Prices were heightened in Kenya and Somalia by tight supplies, while high domestic and regional demand put upward pressure on prices in Uganda and Tanzania.

PROJECTED MARKET TRENDS FOR 2019/20

Domestic and Regional Supply Levels

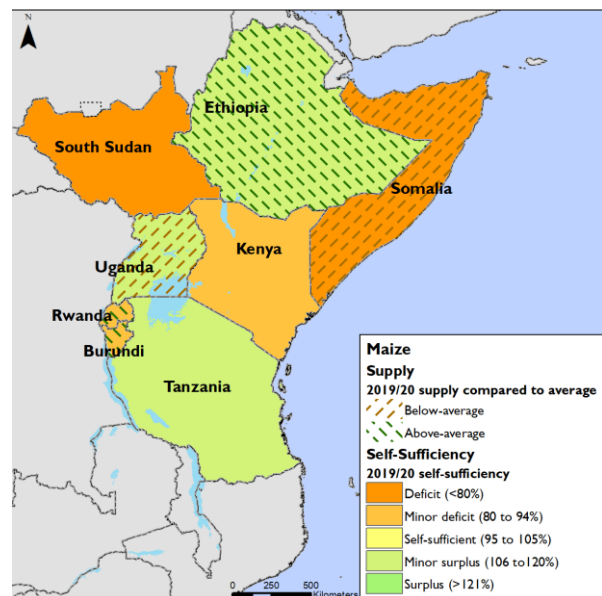
- Exportable maize surpluses for 2019/20 in East Africa are estimated at 1.6 million MT. This is a decrease of 18 percent from last year (July 2018 to June 2019) and below the recent five-year average levels. The lower availability is attributed to below average rainfall with poor spatial and temporal distribution during the production seasons across most maize producing areas. Uganda, which accounts for 14 percent of maize production will contribute to 31 percent of the tradable surplus. This is despite a significantly below average June-to-July harvest (Figure 6). Tanzania and Ethiopia account for the remaining 37 and 32 percent of the tradable maize surplus.
- The estimated aggregate import gap for the structurally maize deficit countries of Kenya, South Sudan, Rwanda, Burundi, and Somalia is estimated at 757,019 MT between July 2019 and June 2020. This amount is well above the import gaps estimated for last year and recent five-year average due to poor rainfall performance that reduced area under production

Figure 5. Current 2019 Maize Prices Compared to Average and 2019/20 Production compared to Average



Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

Figure 6. Projected 2019/2020 Maize Self-Sufficiency and Supply Levels compared to Average



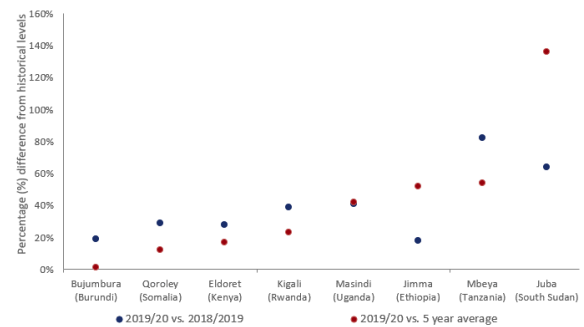
Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

- and yields especially in Kenya and Somalia. The deficit is expected to be filled by imports mostly from Tanzania followed by Uganda because of proximity to the main markets in the deficit countries, and higher market integration. Northern Kenya is expected to get supplies from Ethiopia. Hence the net regional surplus is expected to be 874,579 MT, which is 50 and 18 percent lower than last year and recent five-year average level.
- Tanzania, Ethiopia, and Uganda are expected to remain the main source for maize in East Africa because of availability of tradeable stocks at lower prices. Restrictions on exports are not anticipated by the Tanzanian government. Prices were relatively low in 2018 and early 2019 affecting farm incomes and production, trends the government would like to reverse.

Price Trends

- Tight maize supplies are expected to support elevated prices across most markets in the region as demand increases in structurally deficit countries and pulls imports from surplus producing countries. This is in turn expected to exert upward pressure on prices (**Figure 7**). Persistent currency depreciation and high inflation are expected to further reinforce higher prices in Ethiopia, South Sudan, and Burundi.
- Seasonal decline in prices between October and March are expected across most markets in the region (**Figures 8 and Figure 9**). However, the decrease in prices will likely be narrow and brief because of tight maize supplies, and/or worsening economic situation; in addition to temporary trade disruptions in South Sudan and Somalia and with neighboring countries.
- Maize prices in Tanzania, Ethiopia, and Uganda are expected to trend seasonably but remain higher than last year and recent five-year average levels because high domestic and regional demand amidst tight supplies (**Figure 8 and Figure 9**). Maize prices in Kenya, and Somalia are also expected to trend typically but remain elevated because of increased demand following lower production than last year. In Rwanda and Burundi, the prices are anticipated to remain high despite better production as increased demand extends to eastern Democratic Republic of Congo
- In South Sudan, relative tranquility is expected to continue being observed in most parts of the country, despite slow implementation of critical aspects of the signed peace deal. Trade are now able to operate freely across most parts of the country, except in some localized areas in Northern Bahr El Ghazel. Oil production will likely continue at between 180, 000 and 210,000 barrels per day between October 2019 and June 2020 enhancing government revenues with going to pay off debts. This will lead to positive, albeit marginal, economic growth in 2020. However, the pace of economic recovery will most likely remain sluggish. Consequently, currency depreciation and high inflation will remain persistent sustaining elevated maize prices that follow seasonal patterns.

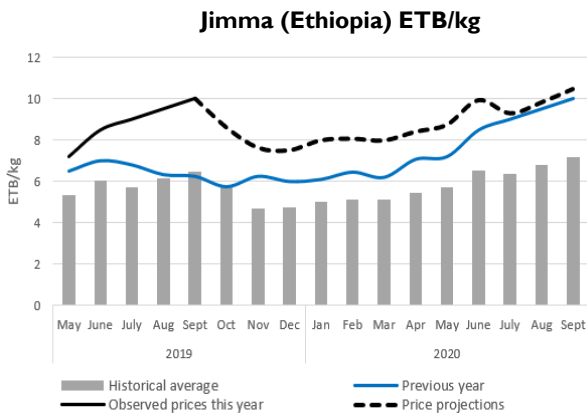
Figure 7. Percentage difference between projected 2019/20 maize prices and their 2018/19 and 5-year average levels in selected East African markets



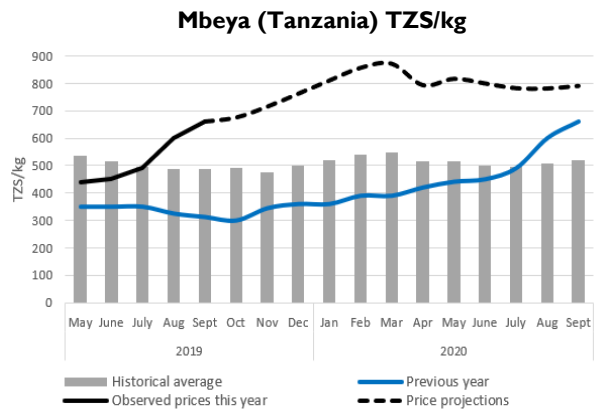
Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

Note: This chart presents the percentage difference between projected 2019/20 prices relative to their 2018/19- and 5-year average levels. For example, the 2019/20 prices in Sudan are projected to be approximately 136 percent above the five-year average, and approximately 64 percent above 2018/19.

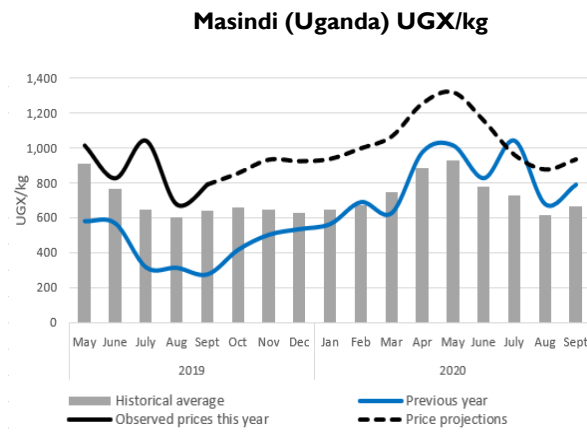
Figure 8. Maize price projections in structurally surplus areas October 2019 - September 2020



Source: FEWS NET estimates based on data from ETBC.

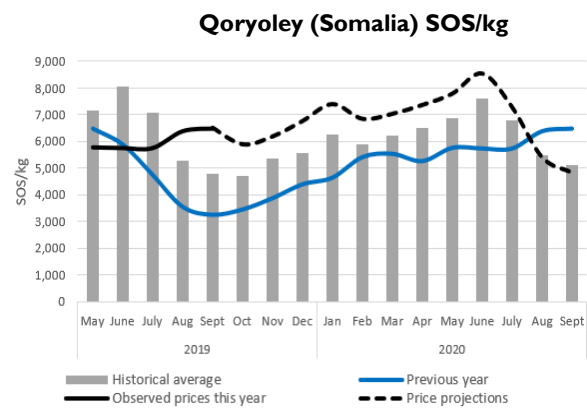


Source: FEWS NET estimates based on data from RATIN.

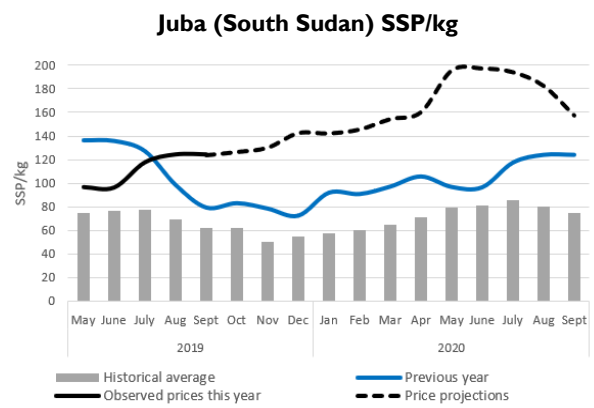


Source: FEWS NET estimates based on data from Farmgain.

Figure 9. Maize price projections in structurally-deficit areas October 2019 –September 2020

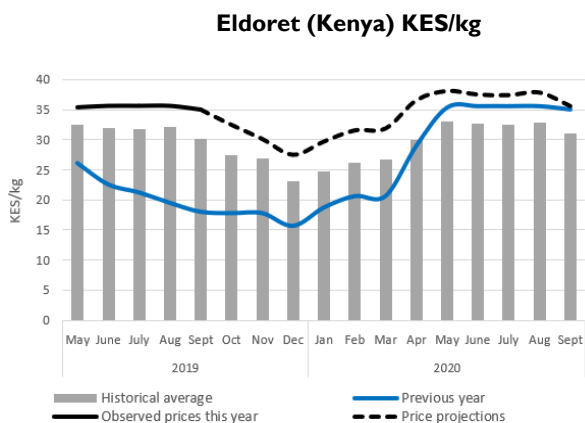


Source: FEWS NET estimates based on data from FSNAU.

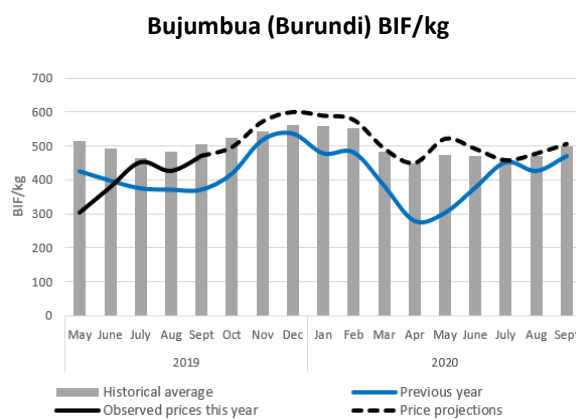


Source: FEWS NET estimates based on data from WFP.

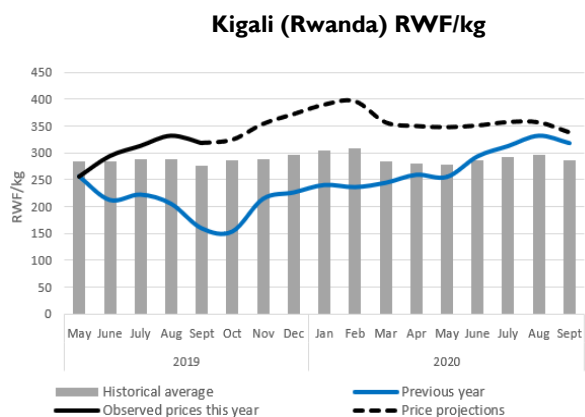
Figure 9. Maize price projections in structurally-deficit areas October 2019 –September 2020 (continued)



Source: FEWS NET estimates based on data from Ministry of Agriculture.



Source: FEWS NET estimates based on data from RATIN.



Source: FEWS NET estimates based on data from Ministry of Agriculture.

EVENTS THAT COULD CHANGE THE OUTLOOK

Based on the estimated available supplies in the region and expected regional market trends, most of the region is expected to experience high prices over the 2019/20 outlook period. There are some events that could exacerbate this situation or could potentially change this outlook.

Area	Event	Impact on market outcomes
Sudan and Ethiopia	Further devaluation or Floating of local currency	Would increase domestic prices of maize, reducing internal demand but reduce export parity prices boosting regional exports.
South Sudan	Reduced/heightened level of conflict	Reduced conflict would will lead to enhanced domestic and regional trade, increasing supplies and exerting downward pressure on prices. If the conflict level increases, domestic and regional trade will likely be disrupted exerting upward pressure on prices
Somalia, South Sudan, and parts of Ethiopia	Reduced food assistance distributions	Would result in higher prices reducing market access by some households, not only for maize but also its substitutes including sorghum, millet and wheat.
Tanzania	Tacit denial of export permits	Will likely moderate domestic price increases in Tanzania but strengthen calls for international imports in Kenya, moderating price elevation. Exert upward pressure on prices in Burundi and Rwanda.

Area	Event	Impact on market outcomes
Uganda and Rwanda	Opening of closed borders	Will increase inflows of maize from Uganda into Rwanda, moderating price increase in Rwanda, but increasing prices in Uganda due to expansion of regional demand to Rwanda from Kenya and South Sudan.

MARKET MONITORING INDICATORS FOR INSERT DATE OF MARKETING YEAR

There are several key indicators that are recommended for ongoing monitoring that may affect the evolution of markets.

Indicator	Justification
Inflation	Reduces purchasing power, reducing market demand, and mitigating price increase especially in South Sudan, Burundi, and Ethiopia.
Livestock prices and quantities	As the main source of income, the level of livestock prices and quantity sold would determine a household's ability to buy enough maize grain and flours in the market especially in Somalia, pastoral areas of Kenya, Ethiopia and South Sudan.
Staple maize grain and flour prices	Accessibility by households to adequate staple foods depends on their market prices and volatility. Stable and relatively low prices make decision making by households more certain and increases the ability of most households to purchase enough across all countries.
Food Aid distribution	Relief grain and flour sales into the market has some significant localized impact on the prices of maize across all countries.
Level of civil strife and inter-communal conflict	Further escalation of civil conflict and or inter-communal clashes would likely disrupt supplies from source to consumption markets increasing local prices particularly in South Sudan and Somalia.
Cross Border Trade Policies	Uganda, South Sudan, Ethiopia, and Somalia usually do not control staple food imports and exports. However, Tanzania occasionally controls exports. This is likely to result in reduced domestic prices but high demand and prices in destination markets in parts of Kenya, Rwanda and Burundi.
Government wheat subsidies	Although the government of Ethiopia is gradually but consistently moving away from expensive domestic targeted wheat subsidies, in areas where they are applied, the local prices wheat and substitute prices are likely to remain stable.
Peace Agreement in South Sudan	Implementation of the Peace Agreement in Sudan will likely re-energize the current improving economic condition, business and trade environment, forthcoming production, resulting in downward pressure on prices. Continued delay in the implementation of the agreement will likely prolong the current situation in which goodwill of all stakeholders is slightly improving the above parameters but uncertainty would increase risks to trade, costs of which will be passed to consumers sustaining elevated prices.

Annex I. East Africa Maize Balance Sheets and 2018/19 Projections by Country (MT) ¹

Country	Item	2018/2019	2019/2020	5-year Average 2014/2015 to 2018/2019	% from over one year	% from over 5- year average	Change one year	Change 5- year average
Burundi	Opening Stocks	12	15	16	25%	-6%	▲	▶
Burundi	Production	149,857	155,851	137,548	4%	13%	▶	▲
Burundi	Domestic Supply	149,869	155,866	137,564	4%	13%	▶	▲
Burundi	Other Uses	11,239	11,689	10,316	4%	13%	▶	▲
Burundi	Consumption	153,464	158,573	142,445	3%	11%	▶	▲
Burundi	Domestic Demand	164,704	170,262	152,761	3%	11%	▶	▲
Burundi	Domestic Balance	-14,835	-14,396	-15,197	-3%	-5%	▶	▶
Burundi	Self-Sufficiency	91%	92%	90%	1%	2%	▶	▶
Ethiopia	Opening Stocks	1,807,094	2,199,107	1,872,280	22%	17%	▲	▲
Ethiopia	Production	6,930,000	6,583,500	6,221,704	-5%	6%	▶	▶
Ethiopia	Domestic Supply	8,737,094	8,782,607	8,093,984	1%	9%	▶	▶
Ethiopia	Other Uses	467,775	444,386	419,965	-5%	6%	▶	▶
Ethiopia	Consumption	7,579,094	7,770,845	7,214,749	3%	8%	▶	▶
Ethiopia	Domestic Demand	8,046,869	8,215,231	7,634,714	2%	8%	▶	▶
Ethiopia	Domestic Balance	690,225	567,376	459,269	-18%	24%	▼	▲
Ethiopia	Self-Sufficiency	109%	107%	106%	-2%	1%	▶	▶
Kenya	Opening Stocks	361,518	324,242	196,134	-10%	65%	▼	▲
Kenya	Production	3,336,277	3,060,000	3,147,989	-8%	-3%	▶	▶
Kenya	Domestic Supply	3,697,795	3,384,242	3,344,123	-8%	1%	▶	▶
Kenya	Other Uses	467,079	428,400	440,719	-8%	-3%	▶	▶
Kenya	Consumption	3,283,337	3,521,757	3,255,338	7%	8%	▶	▶
Kenya	Domestic Demand	3,750,416	3,950,157	3,696,057	5%	7%	▶	▶
Kenya	Domestic Balance	-52,621	-565,914	-351,934	975%	61%	▲	▲
Kenya	Self-Sufficiency	99%	86%	90%	-13%	-5%	▼	▶
Rwanda	Opening Stocks	20	3,701	35	18,473%	10,553%	▲	▲
Rwanda	Production	567,000	595,350	556,900	5%	7%	▶	▶
Rwanda	Domestic Supply	567,020	599,051	556,935	6%	8%	▶	▶
Rwanda	Other Uses	79,380	83,349	77,966	5%	7%	▶	▶
Rwanda	Consumption	564,698	578,268	544,262	2%	6%	▶	▶
Rwanda	Domestic Demand	644,078	661,617	622,228	3%	6%	▶	▶
Rwanda	Domestic Balance	-77,058	-62,565	-65,293	-19%	-4%	▼	▶
Rwanda	Self-Sufficiency	88%	91%	90%	3%	1%	▶	▶

Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

¹ Data for the 2019/20 marketing year (MY 2019/20) are FEWS NET estimates as of October 23rd, 2019; ▶ denotes less than or equal to 10 percent change; ▲ denotes greater than 10 percent increase; ▼ denotes greater than 10 percent decrease.

Country	Item	2018/2019	2019/2020	5-year	% from	% from	Change	Change 5-
				Average	over	over 5-		
				2014/2015	one	year		average
				to	year	average		
				2018/2019				
Somalia	Opening Stocks	0	0	3	-220%	-91%	▼	▼
Somalia	Production	88,600	48,300	114,440	-45%	-58%	▼	▼
Somalia	Domestic Supply	88,600	48,300	114,443	-45%	-58%	▼	▼
Somalia	Other Uses	4,430	2,415	5,722	-45%	-58%	▼	▼
Somalia	Consumption	90,119	81,878	112,930	-9%	-27%	►	▼
Somalia	Domestic Demand	94,549	84,293	118,652	-11%	-29%	▼	▼
Somalia	Domestic Balance	-5,950	-35,992	-4,209	505%	755%	▲	▲
Somalia	Self-Sufficiency	94%	57%	96%	-39%	-40%	▼	▼
South Sudan	Opening Stocks	0	365	0	145,890%	654%	▲	▲
South Sudan	Production	235,541	247,318	254,306	5%	-3%	►	►
South Sudan	Domestic Supply	235,541	247,383	254,307	5%	-3%	►	►
South Sudan	Other Uses	11,777	12,366	12,715	5%	-3%	►	►
South Sudan	Consumption	313,468	313,468	336,103	0%	-7%	►	►
South Sudan	Domestic Demand	325,245	325,834	348,818	0%	-7%	►	►
South Sudan	Domestic Balance	-89,704	-78,151	-94,512	-13%	-17%	▼	▼
South Sudan	Self-Sufficiency	72%	76%	74%	5%	3%	►	►
Tanzania	Opening Stocks	292,629	503,263	353,610	72%	42%	▲	▲
Tanzania	Production	6,212,903	5,817,508	5,675,543	-6%	3%	►	►
Tanzania	Domestic Supply	6,505,532	6,320,771	6,029,152	-3%	5%	►	►
Tanzania	Other Uses	869,806	814,451	794,576	-6%	3%	►	►
Tanzania	Consumption	4,840,727	4,808,248	4,617,718	-1%	4%	►	►
Tanzania	Domestic Demand	5,710,533	5,622,700	5,412,294	-2%	4%	►	►
Tanzania	Domestic Balance	794,999	698,072	616,859	-12%	13%	▼	▲
Tanzania	Self-Sufficiency	114%	112%	111%	-1%	1%	►	►
Uganda	Opening Stocks	289,588	290,064	269,883	0%	7%	►	►
Uganda	Production	2,693,558	2,424,203	2,665,910	-10%	-9%	▼	►
Uganda	Domestic Supply	2,983,146	2,714,267	2,935,793	-9%	-8%	►	►
Uganda	Other Uses	377,098	339,388	373,227	-10%	-9%	▼	►
Uganda	Consumption	2,114,448	2,008,728	1,989,066	-5%	1%	►	►
Uganda	Domestic Demand	2,491,546	2,348,117	2,362,293	-6%	-1%	►	►
Uganda	Domestic Balance	491,600	366,150	573,500	-26%	-36%	▼	▼
Uganda	Self-Sufficiency	120%	116%	129%	-3%	-7%	►	►
Regional	Opening Stocks	2,750,861	3,320,758	2,768,174	21%	20%	▲	▲
Regional	Production	20,213,736	18,932,030	18,425,170	-6%	3%	►	►
Regional	Supply	22,964,597	22,252,787	21,193,343	-3%	5%	►	►
Regional	Other Uses	2,288,585	2,136,444	2,092,198	-7%	2%	►	►
Regional	Consumption	18,939,355	19,241,764	18,028,578	2%	7%	►	►
Regional	Demand	21,227,940	21,378,209	20,120,776	1%	6%	►	►
Regional	Balance	1,736,657	874,579	1,072,567	-50%	-18%	▼	▼
Regional	Self-Sufficiency	108%	104%	105%	4%	-1%	►	►

Source: FEWS NET estimates based on data from regional governments and multi-agency assessments.

Annex II. Average East Africa Grains Balance by Country (MT)²

Country	Commodity	Average Balance	Average production	Average Consumption	Average % contribution to total grain consumption
Burundi	Maize Grain	(15)	138	142	80%
	Millet	-	11	11	6%
	Sorghum	51	25	25	14%
	Total Grain	36	174	179	
Ethiopia	Barley	180	2,051	1,963	11%
	Maize Grain	1,902	6,222	5,772	33%
	Millet	18	1,009	990	6%
	Sorghum	602	4,735	4,440	25%
	Teff	(336)	4,840	(4,194)	-24%
	Wheat	(762)	4,550	5,670	32%
	Sorghum	701	3,835	3,020	17%
Total Grain	2,305	27,243	17,661		
Kenya	Barley	4	67	63	1%
	Maize Grain	(352)	3,148	3,255	53%
	Millet	-	85	85	1%
	Rice, Milled	(488)	70	669	11%
	Wheat	(1,590)	243	1,855	30%
	Sorghum	(21)	158	182	3%
	Total Grain	(2,447)	3,770	6,109	
Rwanda	Maize Grain	(65)	557	544	60%
	Millet	-	4	4	0%
	Rice, Milled	-	-	-	0%
	Wheat	(105)	77	197	22%
	Sorghum	(14)	147	161	18%
	Total Grain	(184)	784	906	
Somalia	Maize Grain	(4)	114	113	9%
	Rice, Milled	(368)	1	369	30%
	Sorghum	(56)	120	151	12%
	Wheat	(406)	-	406	34%
	Sorghum	(50)	126	171	14%
	Total Grain	(885)	362	1,210	
South Sudan	Corn	(7)	141	148	12%
	Maize Grain	(95)	254	336	27%
	Millet	-	8	8	1%
	Sorghum	(150)	833	748	60%
	Total Grain	(252)	1,236	1,240	
Sudan	Millet	-	1,227	1,227	10%
	Rice, Milled	-	-	-	0%
	Sorghum	389	4,747	4,500	37%
	Wheat	(2,065)	565	2,905	24%
	Sorghum	646	4,670	3,397	28%
	Total Grain	(1,030)	11,209	12,029	
Tanzania	Maize Grain	617	5,676	4,618	52%
	Millet	-	335	335	4%

² Other grains include maize millet and wheat for Ethiopia and Uganda, maize and wheat for Somalia, millet and wheat for Sudan, and maize and millet for South Sudan. Figures based on data from USDA.

	Rice, Milled	(193)	2,010	2,203	25%
	Wheat	(791)	108	1,005	11%
	Sorghum	73	783	704	8%
	Total Grain	(294)	8,912	8,865	
Uganda	Maize Grain	573	2,666	1,989	66%
	Millet	-	233	233	8%
	Rice, Milled	(78)	159	237	8%
	Wheat	(332)	22	377	13%
	Sorghum	168	332	169	6%
	Total Grain	332	3,413	3,005	

Annex III. Global Cereal Supplies

Global commodity markets remain well supplied with rice, wheat, and maize (**Figure 10**). These supplies are expected to remain above average in 2019/20 despite expectations for lower U.S. maize production where excessive and prolonged spring rains have reduced yield prospects for the 2019/20 crop. The U.S. Department of Agriculture’s (USDA) rice, wheat, and maize supply projections for the September 2019 to August 2020 marketing year, point to a modest increase mainly due to higher wheat production ([USDA](#)). Stock-to-use ratios are projected to be above five-year average levels for rice and wheat but will remain below five-year average levels for maize.

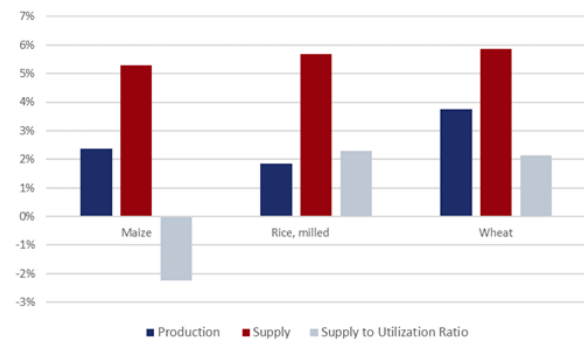
Global rice and wheat prices stabilized on average during the first half of 2019 while maize prices increased above 2018- and five-year average levels owing to reduced production prospects for the 2019 U.S. crop (**Figure 11**). Global cereal prices are on average expected to remain stable in 2019 but could increase by 2020 from lower 2019/20 U.S. crops along with higher energy and fertilizer costs ([World Bank](#)).

Key risks for the global cereal market include high energy and fertilizer prices, higher than expected demand for biofuels, sluggish global economic growth, domestic support and trade policy related risks, currency depreciation in emerging and developing economies, and poor weather patterns in major producer and export countries.

ENSO-neutral conditions are present and are forecast (50 – 55 percent chance) to continue through the Northern Hemisphere winter ([NOAA](#)). The impact of this forecast will vary geographically (**Figure 12**).

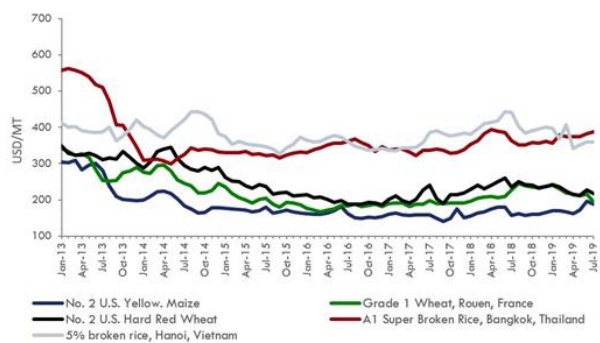
FEWS NET will continue to monitor the global commodity situation in the coming months as global 2019/20 commodity supply estimates by the USDA, International Grains Council (IGC), the FAO, and AMIS are updated.

Figure 10. Global Market Indicators, 2019/20 Compared to 2014/15 - 2018/19 Average



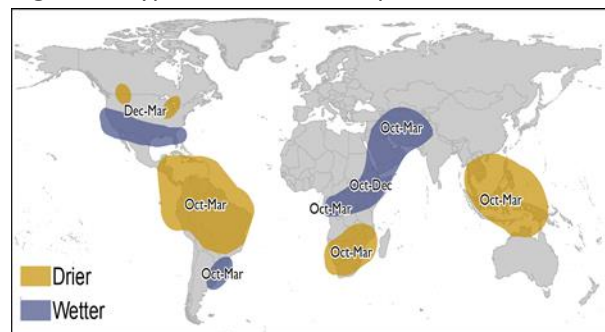
Source: FEWS NET calculations based on USDA July 2019 data.

Figure 11. Global Commodity Prices (USD/MT) 2013-2019



Source: Food and Agriculture Organization of the United Nations (FAO), World Bank, 2019.

Figure 12. Typical Global El Niño Impacts, October - March



Source: FEWS NET.