TADB "The Farmers' Bank" **The AgroBrief** *MARCH 2026* *Series #03*

This AgroBrief provides a comprehensive market overview for Maize and Sunflower value chains, covering global market conditions, local market trends, and outlooks based on the latest accessible data available up to mid February 2026.

## MAIZE

### Global Market Overview

- Global maize markets in early 2026 are defined by a "comfortable supply buffer" that has kept international futures (standardized prices) under pressure. The February 2026 World Agricultural Supply and Demand Estimates (WASDE) report confirmed that while global demand is improving, it remains insufficient to tighten supply.
- **Price Levels**: Corn futures (standardized prices) hovered around $169.29 per metric tonne (MT) throughout early February.
- **Production**: Global coarse grain production remains near 1.59 billion tonnes. The U.S. began 2026 with record inventories following a 432.34 million metric tonnes (MT) harvest, a 14% increase over 2024 levels
- **Supply Dynamics**: A fast-moving Brazilian harvest has increased immediate supply, while China remains the second-largest producer, utilizing its crop primarily for massive swine operations.
- **Outlook**: Incremental gains in export and feed demand are being absorbed by existing supply rather than translating into sustained price increases.

### Global Average maize Prices (USD/Kg)


### Top 10 producers and Importers of Maize globally

| Rank | Top Producers | Output (Million MT) | Top Importers | Market Share (Imports) |
|---|---|---|---|---|
| 1 | United States | 378.27 | China | ~16.5% |
| 2 | China | 294.92 | European Union | ~12.5% |
| 3 | Brazil | 136 | Mexico | ~10.4% |
| 4 | European Union | 59.02 | Japan | ~9.3% |
| 5 | Argentina | 50 | Korea, Rep. | ~7.0% |
| 6 | India | 42.28 | Vietnam | ~5.8% |
| 7 | Ukraine | 26.8 | Spain | ~5.7% |
| 8 | Mexico | 23.2 | Egypt | ~4.6% |
| 9 | South Africa | 17.06 | Italy | ~3.9% |
| 10 | Canada | 15.35 | Colombia | ~3.9% |
| | Source;FAO,WITS,WASDE | | | |

### Local Market Overview

- The Tanzanian maize sub-sector continues to benefit from the record 2024 harvest, where production reached 13.9 million metric tonnes (MT). However, regional price disparities highlight the importance of financing aggregation and logistics.
- **Price Disparity**: Wholesale prices remain stable but vary by region, ranging from TZS 500 per kg in surplus zones like Njombe to TZS 1,000 per kg in coastal entry points like Daresalaam.
- **Production Outlook**: Planting of Rainy season (Masika) crops in bimodal areas commences in mid-February, with above-average rainfall expected between March and May 2026.

### Local Average maize Prices (TZS/Kg)


| Production Zone | Rainfall Regime | Harvesting Season |
|---|---|---|
| **Southern Highlands** (Ruvuma, Mbeya, Rukwa, Iringa, Njombe, Songwe) | **Unimodal** | May – July |
| **Central Zone** (Dodoma, Singida) | **Unimodal** | May – July |
| **Western Zone** (Tabora, Kigoma, Katavi) | **Unimodal** | May – July |
| **Northern Highlands** (Arusha, Kilimanjaro, Manyara) | **Bimodal** | Late Jan – Feb (Short)<br>July – Aug (Main) |
| **Lake Zone** (Mwanza, Kagera, Mara, Geita, Shinyanga) | **Bimodal** | Jan – Feb (Short)<br>June – Aug (Main) |
| **Eastern & Coastal** (Morogoro, Tanga, | **Bimodal** | Late Jan – Feb (Short)<br>July – Aug (Main) |

### Top 10 destinations for Maize exports from Tanzania

| Rank. | Destination Country | Export Share (%) | Export Value (USD) | Primary Product |
|---|---|---|---|---|
| 1 | Uganda | 71.99% | 3.51 Million | Seed / Grain |
| 2 | Kenya | 15.97% | 777,900 | Grain / Flour |
| 3 | Rwanda | 4.51% | 219,980 | Grain / Flour |
| 4 | Dem. Rep. Congo | 4.39% | 213,850 | Flour / Starch |
| 5 | Malawi | 3.14% | 152,990 | Grain / Flour |
| 6 | Burundi | <1.0% | 14,800 | Flour |
| 7 | United States | <1.0% | 10,160 | Specialty Flour |
| 8 | Oman | <1.0% | 1,300 | Seed / Flour |
| 9 | Australia | <1.0% | 1,010 | Flour |
| 10 | Germany | <1.0% | 540 | Specialty Flour |
| | Source;FAO,WITS,WASDE | | | |

**SOURCES LOCAL DATA:** Ministry of Agriculture, Tanzania Investment Centre (TIC).
**GLOBAL DATA:** , World Bank Pink Sheet(WITS), USDA WASDE, UN COMTRADE,**FAOSTAT**

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# SUNFLOWER

## Global Market Overview

- The global sunflower market reached "peak demand and prices" in the first half of February 2026, primarily due to supply tightness in the Black Sea region in Europe.
- **Price Bubble**: Average world sunflower oil prices stabilized at around $1,540 per metric tonne (MT). This was supported by Turkey's decision to allow duty-free imports of 1 million tonnes of seeds.
- **Production**: Global sunflower production for 2025-2026 is estimated at 56.96 million metric tonnes (MT).
- **Risks**: India, the world's largest buyer, is reportedly shifting to cheaper alternatives like palm or soybean oil at these peak prices.
- **Outlook**: Analysts suggest prices have reached a "ceiling." A technical correction is expected to drop seed prices in major ports from $630 per MT to $570 per MT as Turkish demand is satisfied.

## Global Sunflower Prices Forecast (USD/Kg)

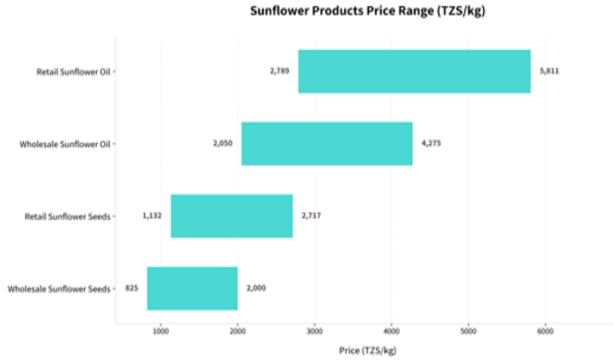

## Top 10 producers and Importers of Sunflower globally

| Rank | Top Producers | Output (Million MT) | Top Importers | Import Share (%) |
|---|---|---|---|---|
| 1 | Russia | 16.55 | India | 26.00% |
| 2 | Ukraine | 12.9 | China | 13.80% |
| 3 | European Union | 8.78 | Turkey | 13.10% |
| 4 | Argentina | 4 | Spain | 6.14% |
| 5 | Kazakhstan | 1.83 | Italy | 5.13% |
| 6 | China | 1.75 | Bulgaria | ~4.5% |
| 7 | Turkey | 1.38 | Netherlands | ~4.0% |
| 8 | Moldova | 0.74 | Romania | ~3.8% |
| 9 | South Africa | 0.7 | Germany | ~3.5% |
| 10 | Serbia | 0.63 | France | ~3.0% |
| | | | | |
| | Source; FAO,WITS,WASDE | | | |

## Local Market Overview

- Sunflower serves as a critical import substitution value chain. Currently, Tanzania produces roughly 205,000 metric tons of edible oil locally, covering just 36% of the 570,000 metric ton annual demand. This leaves a substantial gap of 365,000 metric tons, meaning the country still imports 64% of its required supply.
- **Price Trends**: Wholesale prices for sunflower seeds in Tanzania for early 2026 range between 800 and 2,000 TZS per kg.
- **Production Hubs**: Dodoma and Singida remain the leading regions, with Dodoma accounting for 40.3% of national production.
- **Strategic Investment:** Financial institutions continues to facilitate finance for SME oil processors to reduce extraction inefficiencies, while parallel efforts are necessary to support primary producers and address the ongoing shortage of raw seed supply.
- **Outlook**: The government's Agenda 10/30 targets 3 million metric tonnes (MT) of sunflower production by the 2025/26 season. To achieve self-sufficiency, with TADB-backed finance focusing on bridging the yield gap via hybrid seeds.

## Local Average Sunflower Prices (TZS/Kg)




## Top 10 destinations for sunflower exports from Tanzania

| Rank | Destination Country | Export Share (%) | Export Value (USD) | Primary Product |
|---|---|---|---|---|
| 1 | Netherlands | 39.54% | 96,760 | Seeds / Broken |
| 2 | United States | 26.70% | 65,330 | Organic Seeds |
| 3 | India | 14.71% | 35,990 | Raw Seeds |
| 4 | Burundi | 11.04% | 27,010 | Seeds / Oil |
| 5 | Kenya | 7.96% | 19,480 | Seeds / Cake |
| 6 | Norway | ~1.5% | 7,790 | Seeds |
| 7 | Saudi Arabia | ~1.0% | 3,820 | Seeds |
| 8 | Rwanda | <1.0% | ~1,000 | Seeds / Oil |
| 9 | Uganda | <1.0% | Varies | Seed Cake |
| 10 | UAE | <1.0% | Varies | Refined Oil |
| *Source:* | FAOSTAT | | | |

**SOURCES LOCAL DATA:** Ministry of Agriculture, Tanzania Investment Centre (TIC).
**GLOBAL DATA:** , World Bank Pink Sheet(WITS), USDA WASDE, UN COMTRADE,**FAOSTAT**