

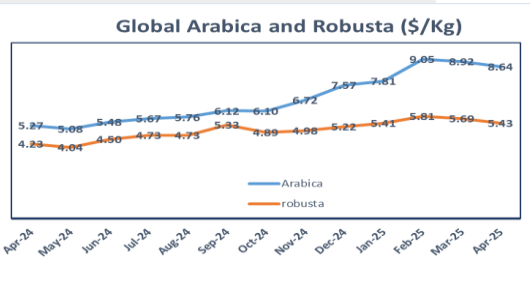
This AgroBrief provides an overview of the agricultural market trends for coffee, cotton, rice, and maize. It covers global market conditions (major producers and production forecasts), regional and national production and price trends, recent crop updates, and outlooks for the 2025 season.

COFFEE

Global Market Overview

- In April 2025, global Arabica prices averaged USD 8.64/kg, down 3.2% MoM, but still up 64% YoY, while Robusta averaged USD 5.43/kg, down 4.7% MoM, and up 28% YoY
- Brazil's (largest Arabica producer) 2024/25 crop supply is 20-25% down due to drought in 2024, increasing prices. Meanwhile Vietnam's (largest robusta producer) Robusta harvest stabilized from the heavy rains in the previous season.
- Low global stocks and high global demand help the prices stay up at the moment.
- Geopolitical risks (Red Sea, US tariffs) impact price volatility.
- EU deforestation laws (EUDR) favor Tanzanian Robusta as it is cultivated without clearing forests, hence in line with their policy.

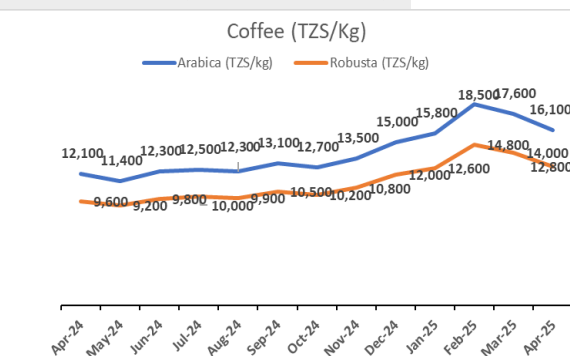
Global Average Coffee Prices (USD/Kg)



Local Market Overview

- Tanzanian auction prices are mostly set in USD at an average of 12800TZS/kg for robusta and 16100 Tzs/kg for Arabica and hence follow the global price trends; domestic consumption is minimal hence most coffee is exported.
- Main harvest ongoing; rains supporting yield.
- Farmers responding to prices despite past crop-switching.
- Export demand (EU, US) strong; prices firm.
- Transport & forex rates worth monitoring.
- Overall, strong export demand (particularly in Europe and the US) and the low production in Brazil predicted to increase local prices unless next Brazil's harvest recovers strongly.

Local Average Coffee Prices TZS/Kg



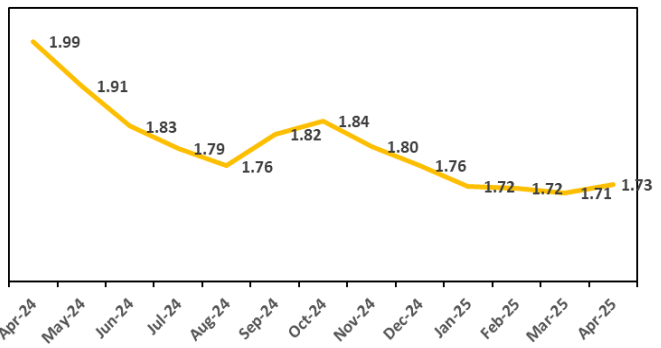
COTTON

Global Market Overview

- World prices remain weak due to sluggish textile demand, especially from China, and high global stocks.
- World market price averaged USD 1.73/kg in April 2025, up slightly from March but down 0.6% MoM 22% YoY.
- US acreage down by 14% in 2025 may tighten supply later this year.
- Bangladesh remains top importer as it is the largest textile producer.
- Policy shifts (e.g., US tariffs) could impact trade.

Global Average Cotton Prices

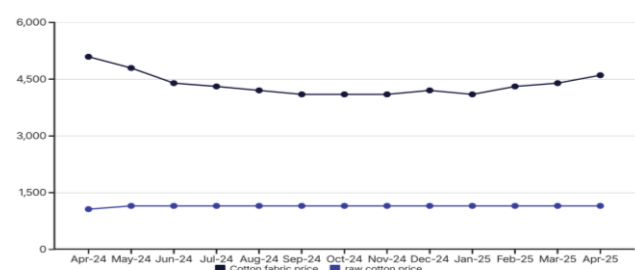
Cotton (\$/Kg)



Local Market Overview

- The price is set at a price floor set by the government which is the major buyer of cotton it was raised from 1060 TZS/Kg to 1150 Tzs/Kg
- The production in 2024 was down due to heavy rains.
- Production expected to rise due to incentives & better seed.
- Main harvest begins May–June; rains are currently favorable for harvest.
- Strong local mill/trader demand emerging.
- No more export bans; trade routes to India/Bangladesh (the largest importers) via Dar-es-salaam are now open.
- The general outlook positive, improving harvesting conditions and sustained global demand will keep prices high while stocks remain limited until the next harvest farmers may expand acreage again if the current prices persist.

Local Average Cotton Prices TZS/Kg



Sources: GLOBAL DATA, Worldbank
LOCAL DATA : Ministry of Agriculture

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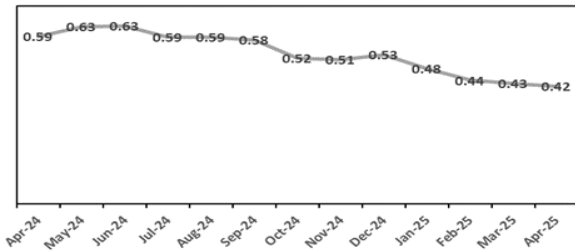
RICE

Global Market Overview

- Prices fell sharply due to India lifting export ban (April 2025).
- Asian rice which has a high quantity in the world market (Thai 5% White): was priced at 0.415\$/kg in April 2025, down 2.4% MoM and 19% YoY.
- 2024/25 production high; global stocks largest in years.
- Export restrictions from India were eased in Late 2024, increasing Global supply.
- Market in a downward momentum due to large South Asian harvests in large producers like Thailand, Vietnam and India.

Global Average Rice Prices USD/Kg

Rice (\$/kg)

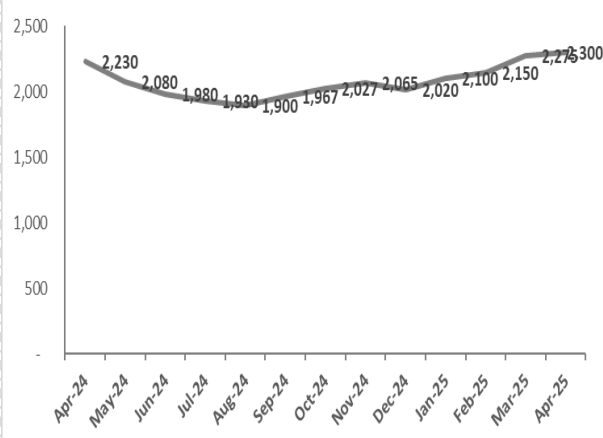


Local Market Overview

- A slight 1.1% increase MoM (From TZS 2275/Kg in March 2025 to TZS 2300/Kg in April 2025) was observed.
- A 3.14% increase YoY was observed as the average price increased from 2230 in April 2024 to 2300 in April 2025
- The increase was due to local supply tightness, increased regional demand, and global rice export restrictions.
- Rain season harvest ongoing; good rains expected to boost yield especially in Kilombero, Mbeya and Shinyanga.
- Imports supplemented urban markets to boost supply and avoid price spikes.
- Malawi import ban briefly disrupted trade (lifted Apr 26).
- The rice market price remains firm due to speculative trading activities driven by concerns over limited Vuli rains, which suggest a potential reduced harvest this season.
- Global abundance likely to avoid the local prices from significantly rising sooner.

Local Average Rice Prices TZS/Kg

Rice Price (TZS/Kg)



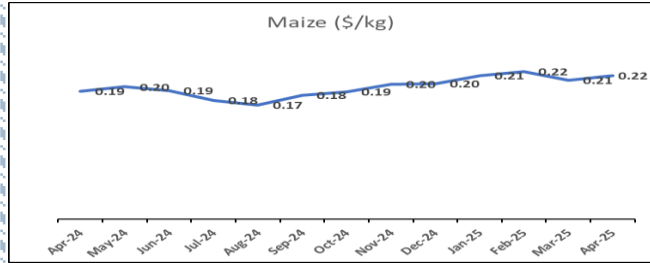
MAIZE

Global Market Overview

- April 2025 global market prices averaged USD 0.215/kg up 3.7% MoM and 12% YoY.
- Maize prices rebounded in early 2025 after prior oversupply.
- Global stocks are tightening; U.S. ending stocks at a 3-year low.
- Ukrainian output down by 34% from peak due to war and their global export share at 14-year low.
- Steady demand from China and Global feed markets was observed.
- Dry weather in South America also led to a limited global supply.

Global Average Maize Prices USD/Kg

Maize (\$/kg)

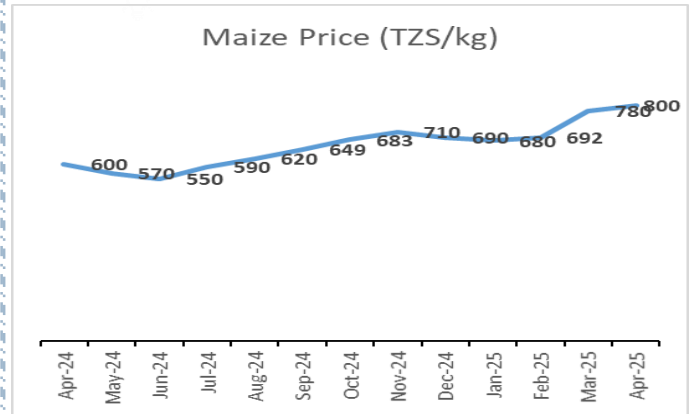


Local Market Overview

- A 2.56% increase MoM was observed (From TZS 750/kg in March 2025 to TZS 800/kg in April 2025).
- A 33.3% increase YoY (From TZS 600/kg in Apr 2024 to TZS 800/kg in April 2025) was observed.
- Strong export demand to Malawi, DRC, and other neighbors due to regional droughts accompanied with tight supply and increased costs of inputs and transportation, caused the price to rise.
- Brief maize flour export ban in April 2025 was lifted quickly.
- Prices expected to remain elevated until harvest season (July–August 2025); possible softening thereafter depending on production volume.
- Rising concerns over a potentially limited Vuli harvest, combined with strong regional export demand, continue to drive upward pressure on local maize prices.

Local Average Maize Prices TZS/Kg

Maize Price (TZS/kg)



Sources:
GLOBAL DATA: Worldbank
LOCAL DATA: Ministry of Agriculture

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