



INFORMAL CROSS BORDER FOOD TRADE IN SOUTHERN AFRICA

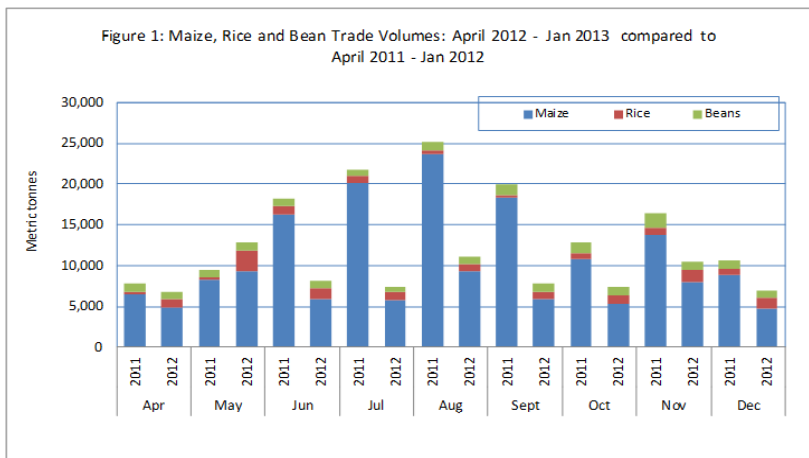
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This Cross Border Food Trade Monitoring Bulletin is prepared by The Alliance for Commodity Trade in Eastern and Southern Africa– ACTESA (A Specialised Agency of COMESA) with funding from The Alliance for a Green Revolution in Africa (AGRA). The report is based on data collected by a network of cross border monitors based at selected border points in Malawi, Mozambique, Zimbabwe and Zambia. The cross border monitors record data on a regular basis, and transmit it to a central location for collation and analysis. Currently, the informal cross border trade monitoring system includes 29 borders. ACTESA has since March 2011, been collaborating with The World Food Programme (WFP) and The Famine Early Warning Systems Network (FEWS NET) on this initiative. Please address any comments/suggestions to the following e-mail addresses: achuula@comesa.int; cmwila@comesa.int; gchansa@comesa.int; or echanda@comesa.int

SUMMARY

- Total volumes of observed informal monthly trade since the start of 2012/13 (May, 2012 to April, 2013) marketing year are at much lower levels compared to last year. Maize, which is the most traded commodity, experienced the highest drop in trade volumes.
- Cumulative (since April 2012) volume of informally traded maize has also dropped by 54 percent from 126,672 MT last year, to 58,430 on account of the drastic drop in outflows from Malawi (a major exporter last season). While rice trade has significantly been higher compared to last year (106 percent increase), trade in beans has also dropped by 19 percent.
- December year on year price trends show significant increases (between 73 – 98 percent) in maize prices across most monitored border sites. The high increases on the Tanzania/ Zambia (Nokonde) and Tanzania/Malawi (Songwe) borders are attributed to the sustained high demand of maize in Tanzania and the rest of East Africa which has given incentive to traders to source supplies within neighboring Zambia and Malawi.



Informally traded volumes of maize and beans have been consistently below levels recorded last year. Monthly variations (when compared to same time last year) have ranged from 13 – 61 percent below last year levels, with the highest drop experienced in September. Compared to the same April – December period last year, total trade is 45 percent down (78,175 MT compared to 142,280 MT last year). Maize trade dropped significantly, falling 54 percent compared to the April to December period last year. The reason for these trends remains largely the export ban put in place by Government of Malawi in December 2011 as a precautionary measure to stem the huge outflows of maize due to increased trader activity to supplied export markets in East Africa and Zimbabwe. Before the ban, monthly volumes of traded maize

were well above the 5-year average and last year's levels. Rice trade on the other hand has been well above the levels that were traded in the April – December period last year, with an overall increase of 106 percent. Most of this trade (64 percent) has been outflows from Malawi to Tanzania. Bean trade has dropped by 19 percent from a cumulative April – December total of 9,915 MT to 8,001 MT. Maize remains the most traded commodity accounting for 75 percent of total informal trade captured since the beginning of the current marketing year: May, 2012 to April, 2013 (Table I).



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Summary of Maize trade flows

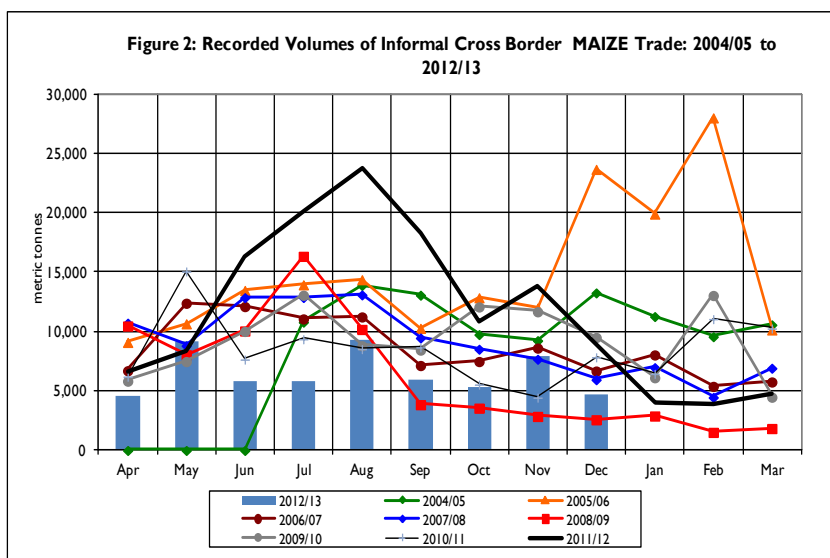
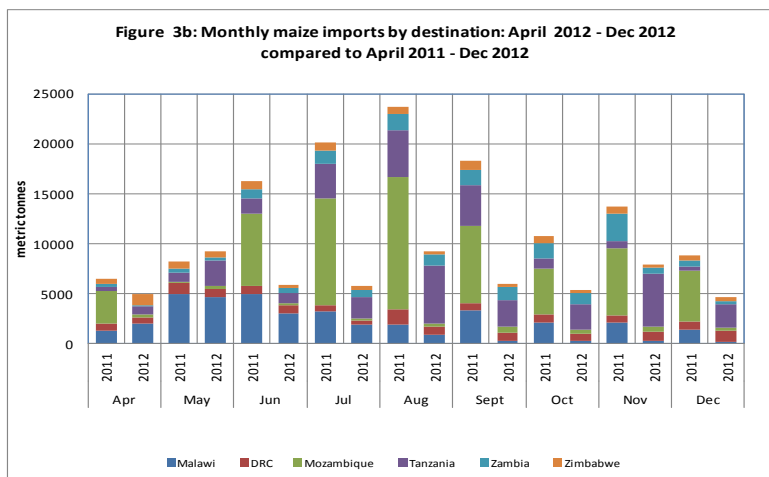
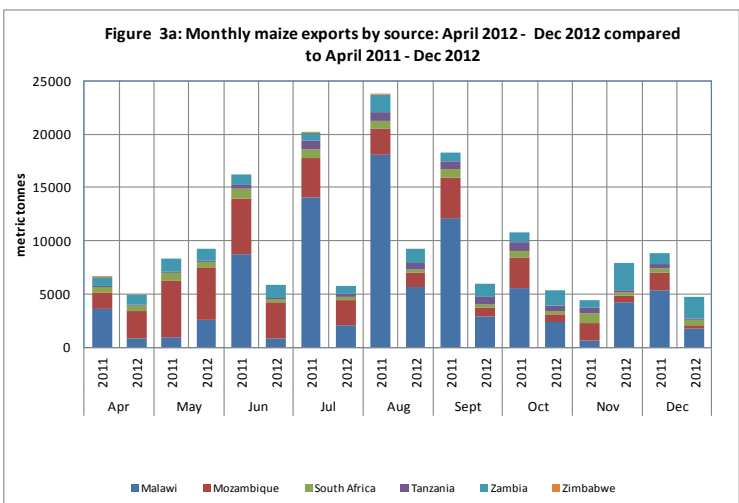


Figure 2 shows trends in volumes of informal maize grain and maize meal trade among the monitored countries while Figure 3 (a and b) shows trade flows by source and destination. Total volumes of informal trade across the monitored countries for the period between September and December 2012 amounted to 23,926 MT as opposed to the same period in 2011 which recorded 51,654 MT. The highest informal trade volumes recorded during this time period was 7,908 MT in the month of November, 2012. December, saw a drop in trade volumes to the lowest (4,707 MT). This drop in volumes traded between November and December is similar to the trend observed over the same period in 2011.

Exports: At country level, total informal exports from Malawi to Mozambique, Tanzania,

and Zambia were the highest at 11,132 MT. Of these, 9,566 MT went to Tanzania, 1,459 MT to Mozambique and only 107 MT went to Zambia. Similarly, informal exports from Zambia to the DRC, Mozambique and Tanzania amounted to 3,491 MT, 346 MT and 3,412 MT, respectively, bringing the total to 7,249 MT. On the other hand, Tanzania's informal exports of 1,662 MT were all destined for Zambia. Most of Mozambique's exports of 2,539 MT went to Malawi (1,037 MT) and Zambia (1,501 MT), while South Africa's 1,345 MT of exports were all destined for Zimbabwe. Total informal trade from Malawi to Tanzania registered the highest monthly volumes comprising 40 percent of the total traded over this period. The highest (3,793 MT) was recorded in November. However, this was followed by a steep fall of 60 percent in December with volumes dropping to 1,489 MT. This could be attributed to the steep increase in prices in the source markets of Malawi where increases of up to 43 percent were recorded between November and December.

Imports: In the same period September-December, 2012, Tanzania's informal maize imports were the highest at 12,978 MT with 9,566 MT and 3,412 MT from Malawi and Zambia respectively, followed by Zambia (3,163 MT) with 1,662 MT and 1,501 MT from Mozambique respectively.



Mozambique received 1,459 MT all from Malawi, while Zimbabwe's 1,345 MT were all from South Africa (only 1 MT came from Mozambique). Malawi recorded the least informal imports of 1,037 MT all from Mozambique.

Maize Meal: The DRC's informal imports of maize meal from Zambia were the highest at 1,443 MT, followed by Zimbabwe with 739 MT from South Africa, Tanzania with 347 MT from Zambia, and lastly, Mozambique with 198 MT from Malawi. The highest and lowest totals traded over this period were 988 MT and 552 MT registered in the months of December and October, 2012, respectively (Table 2, Page 3).

Table 1: Informal cross border MAIZE trade by source and destination country (MT)

Source	Destination	Total 05/06 season	Total 06/07 season	Total 07/08 season	Total 08/09 season	Total 09/10 Season	Total 10/11 Season	Total 11/12 Season	Sep-Dec 2011	Sep-Dec 2012	Cumulative Apr 2011 - Dec2011	Cumulative Apr 2012 - Dec2012
Malawi	Mozambique	133	591	3,755	203	6,124	27,209	59,388	24008	1459	58396	2156
Malawi	DRC	0	0	300	0	0	0	0	0	0	0	0
Malawi	Tanzania	944	2,928	1,581	239	6,031	7,073	17,252	5801	9566	16391	20693
Malawi	Zambia	81	202	1,779	129	315	444	990	496	107	890	263
Malawi	Zimbabwe	0	0	306	0	0	0	0	0	0	0	0
Mozambique	Malawi	71,218	77,394	56,078	54,223	60,399	23,557	30,356	8897	1037	25283	13486
Mozambique	Zambia	49	1,269	2,113	865	4,462	8,341	4,602	2302	1501	4285	2927
Mozambique	Zimbabwe	5	2,085	11	178	1,761	55	10	5	1	8	2
South Africa	Zimbabwe	1,688	49	47	2,663	1,135	9,430	8,232	2694	1345	6370	3345
Tanzania	Malawi	84,862	1,888	1,073	2,910	89	261	27	0	0	27	0
Tanzania	Zambia	13,556	6,260	4,980	2,449	3,730	5,034	6,573	3790	1662	6126	2814
Zambia	DRC	4,682	9,481	33,424	4,589	9,861	12,754	9,652	3133	3491	7823	7148
Zambia	Malawi	419	378	2,500	5,388	546	515	0	0	0	0	0
Zambia	Mozambique	55	2	0	60	130	583	1,239	218	346	521	1015
Zambia	Tanzania	0	7	4	15	257	307	897	307	3412	528	4582
Zambia	Zimbabwe	182	299	433	350	28,493	0	0	0	0	0	0
Zimbabwe	Mozambique	85	294	129	2	8	10	0	0	0	0	0
Zimbabwe	Zambia	0	0	166	207	345	508	24	0	0	24	0
Total Traded (MT)		177,959	103,127	108,679	74,470	123,685	96,081	139,243	51,654	23,926	126,672	58,430

Note: Volumes of maize meal trade are estimated in grain equivalent and added to the volumes of informally traded maize as presented in Table 2 above

Table 2: Informal MAIZE MEAL trade flows by source and destination (MT)

Source	Destination	Total 09/10 season	Total 10/11 season	Total 11/12 season	Apr 2012	May 2012	Jun 2012	Jul 2012	Aug 2012	Sep 2012	Oct 2012	Nov 2012	Dec 2012	Cum total (MT)
Malawi	Mozambique	91	383	608	34	44	20	20	36	31	34	75	58	352
Mozambique	Zimbabwe	25	51	5	448	155	0	0	0	0	0	0	0	605
Mozambique	Malawi	0	540	1,010	0	0	0	0	0	0	0	0	0	0
South Africa	Zimbabwe	904	5,327	2,036	299	341	255	198	186	143	179	189	231	2019
Tanzania	Zambia	104	545	94	3	5	2	3	2	2	5	8	9	39
Zambia	DRC	1,895	1,446	1481	150	178	146	83	374	343	309	335	456	2375
Zambia	Mozambique	11	63	409	0	115	90	35	114	135	0	55	85	629
Zambia	Tanzania	24	37	93	52	51	74	45	12	24	25	149	149	582
Zambia	Zimbabwe	9,200	0	0	0	0	0	0	0	0	0	0	0	0
Zimbabwe	Zambia	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Traded (MT)		12,254	8,392	6,859	539	735	587	384	724	679	552	809	988	6600

Table 3: Percent change in nominal maize grain prices at source/ destination points (USD cents/kg)

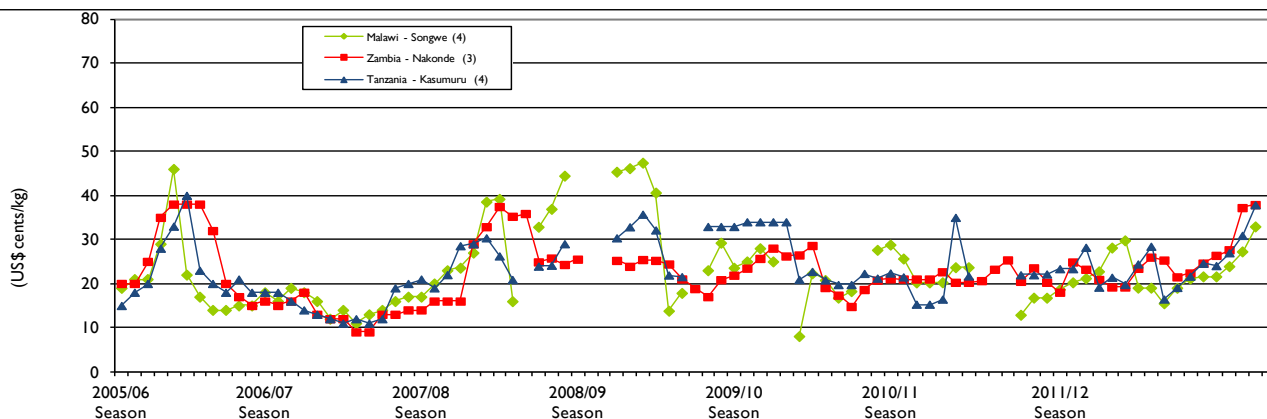
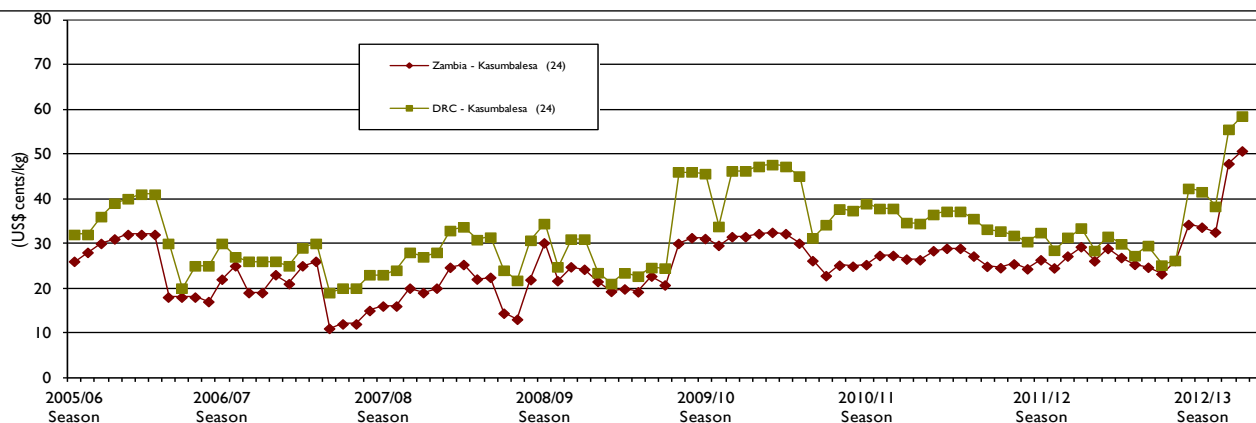
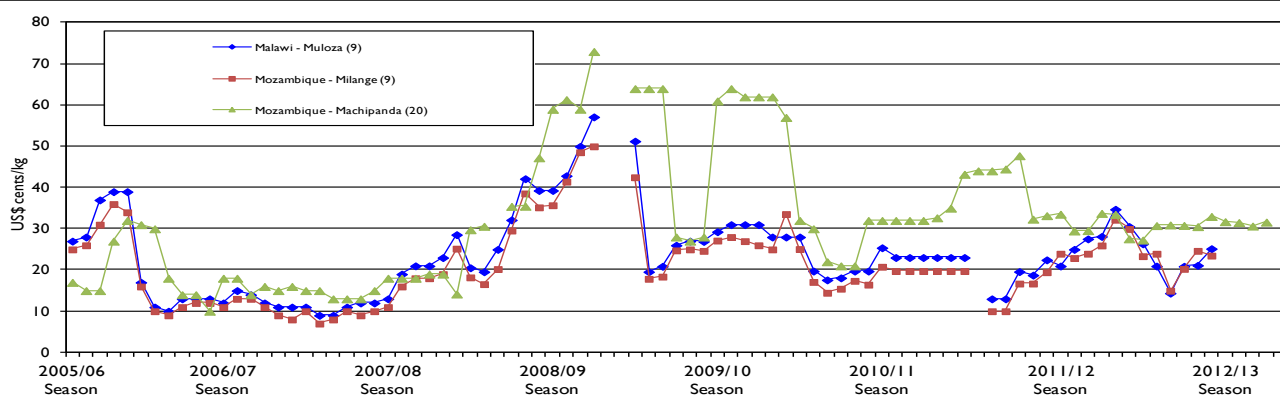
Price at Source (S) and Destination (D)	Aug 2012	Sep 2012	% Change Jul - Aug 2012	Sep 2012	Oct 2012	% Change Sep - Oct 2012	Oct 2012	Nov 2012	% Change Oct - Nov 2012	Nov 2012	Dec 2012	% Change Nov - Dec 2012	Dec 2011	Dec 2012	% Change year on year
Mal/Moz: Muloza (D)	25.17	-	-	-	-	-	-	-	-	-	-	-	28.14	-	-
Moz/Mal: Milanje (S)	23.49	-	-	-	-	-	-	-	-	-	-	-	25.95	-	-
Moz/Zim:- Machipanda (S)	32.98	31.73	-4	31.73	31.51	-1	31.51	30.65	-3	30.65	31.62	3	33.73	31.62	-6
Zam/DRC: Kasumbalesa (S)	34.24	33.63	-2	33.63	32.54	-3	32.54	47.85	47	47.85	50.68	6	29.26	50.68	73
DRC/Zam: Kasumbalesa (D)	42.30	41.54	-2	41.54	38.28	-8	38.28	55.50	45	55.50	58.48	5	33.44	58.48	75
Tan/Zam: Nakonde (S)	24.58	24.05	-2	24.05	26.97	12	26.97	30.91	15	30.91	37.85	22	19.16	37.85	98

Nominal maize grain prices at source and destination points:

Figures 4 a to c (page 4) present monthly nominal maize grain prices (in USD equivalent) for selected border points, while Table 3 shows the monthly percentage changes for the current marketing year as well as the year on year change for the period ending December 2012. Prices were stable across the current monitored borders between September and December.

Nakonde (Tanzania/Zambia) recorded a high 12 percent price increase. From October until December, prices rose significantly across most monitored border markets (source and destination); monthly increases ranged between 3 – 47 percent. The higher increases were observed at both sides of the Kasumbalesa border, and were a reflection of tight supplies on markets where traders source their supplies. The exception to the rising trend was at the Machipanda (Mozambique/ Zimbabwe border, where prices have remained stable throughout the period September to December. Of note in this period is the absence of trade on either side of the Malawi/Mozambique – Muloza/ Milange border which is normally the most active border in terms of maize trade between the two countries. This is due to a combination of factors including poor production (tighter supplies) in this area of Mozambique last season and unfavorable price differentials which acted as a disincentive for maize trade in either direction. December year on year trends also show significant increases (between 73 – 98 percent) across most monitored sites, except again – for Machipanda where a 6 percent drop was recorded compared to December 2011. The high increases on the Tanzania/ Zambia (Nakonde border) are attributed to the sustained high demand of maize in the Greater Horn which has given incentive to Tanzanian traders to source supplies (favorable differential) within neighboring Zambia. Similar trends have been observed at Songwe (Tanzania/Malawi) where maize outflows from Malawi are now the highest recorded through the system.

Figures 4a-4c: Retail MAIZE prices in selected border points (USD cents/ kg)



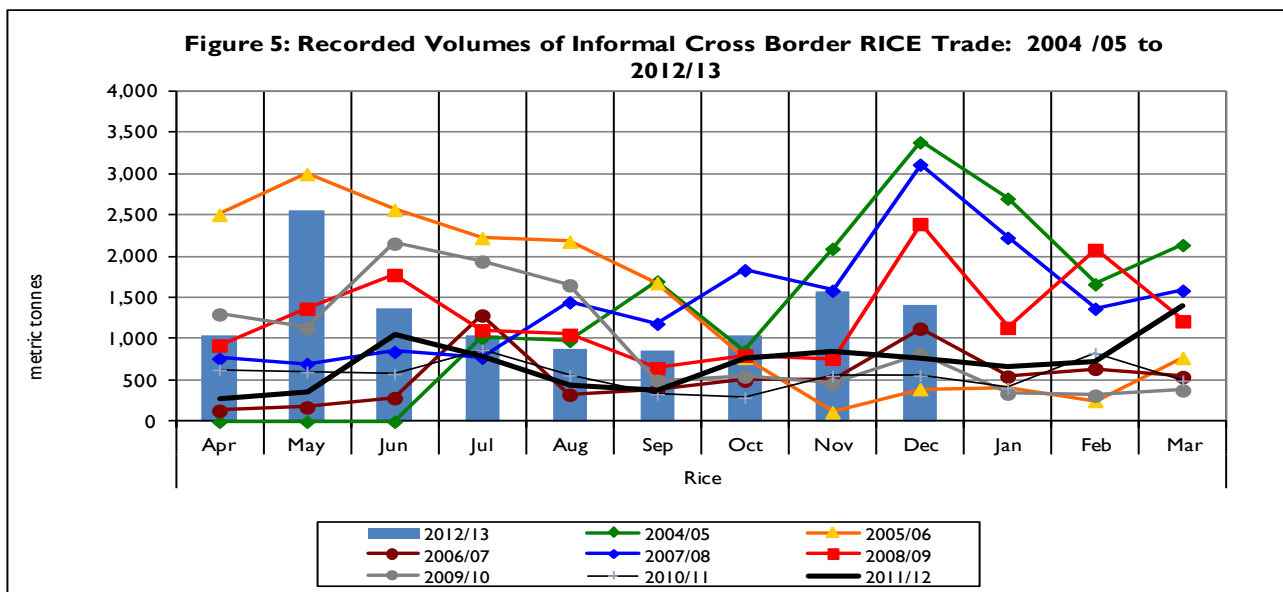
Summary of Rice trade flows

Table 4. Informal cross border RICE trade by source and destination country (MT)

Source	Destination	Total 05/06 season	Total 06/07 season	Total 07/08 season	Total 08/09 season	Total 09/10 Season	Total 10/11 Season	Total 11/12 Season	Sep-Dec-2011	Sep-Dec-2012	Cumulative April011 - Dec2011	Cumulative April-2012 - Dec2012
Malawi	Mozambique	12	1	822	58	518	921	1,677	993	205	1246	388
Malawi	Tanzania	135	1,217	1,568	291	1,909	403	1,648	256	2477	1072	7087
Malawi	Zambia	31	74	2,360	990	2,607	201	0	0	0	0	0
Malawi	Zimbabwe	0	0	405	0	630	0	0	0	0	0	0
Moz	Malawi	1,691	1,718	444	690	588	250	1,104	4	103	380	282
Moz	Zambia				3	4	15	26	9	7	20	15
Moz	Zimbabwe	399	850	1,028	1,958	276	148	143	46	53	113	103
RSA	Zimbabwe	64	82	33	25	215	1,254	914	403	307	676	619
Tanzania	Malawi	912	4	100	154	0	320	0	0	0	0	0
Tanzania	Zambia	641	557	397	374	549	753	1,408	507	1277	942	2227
Zambia	DRC	12,629	1,697	6,746	9,333	3,660	1,839	1,274	436	356	1019	856
Zambia	Malawi	0	0	30	0	7	0	0	0	0	0	0
Zambia	Tanzania	0	0	3	6	9	10	9	3	5	7	10
Zambia	Zimbabwe	106	803	3,312	1,387	568	595	281	115	86	219	158
Zimbabwe	Zambia	0	0	185	0	0	0	0	0	0	0	0
Total Traded (MT)		16,620	7,003	17,434	15,268	11,541	6,708	8,485	2773	4875	5693	11744

Table 4 and Figure 5 summarize informal cross border rice trade trends. Volumes of traded rice have been fluctuating throughout this period, (September, 2012 to December, 2012) depending on available supplies and market opportunities. Despite the marked fluctuation, the cumulative total traded between the same period (September, 2012 to December, 2012) was 64 percent higher (at 4875MT) than last year's total trade in the same period of 2,773MT (Table 5). The volume of trade recorded in November 2012 (1569MT) was the highest for the same period, making up 32 percent of the total. Of 4875. Trade flows (ranked in order of volumes) were notable between Malawi/Tanzania, Tanzania/Zambia, and Zambia/DRC. In this period, Malawi remains the major source of rice with a total share of 63.6 percent, followed by Tanzania at 29 percent. Elsewhere rice trade volumes were low (below 9 percent of the total). Tanzania was the largest importer over this period, receiving over 60.4 percent of the total traded. Zambia came in a distant second with a 19.1 percent share. Flows into the other countries were quite minimal.

Trends in Volumes of Rice Traded by Month and Year



Summary of Bean trade flows

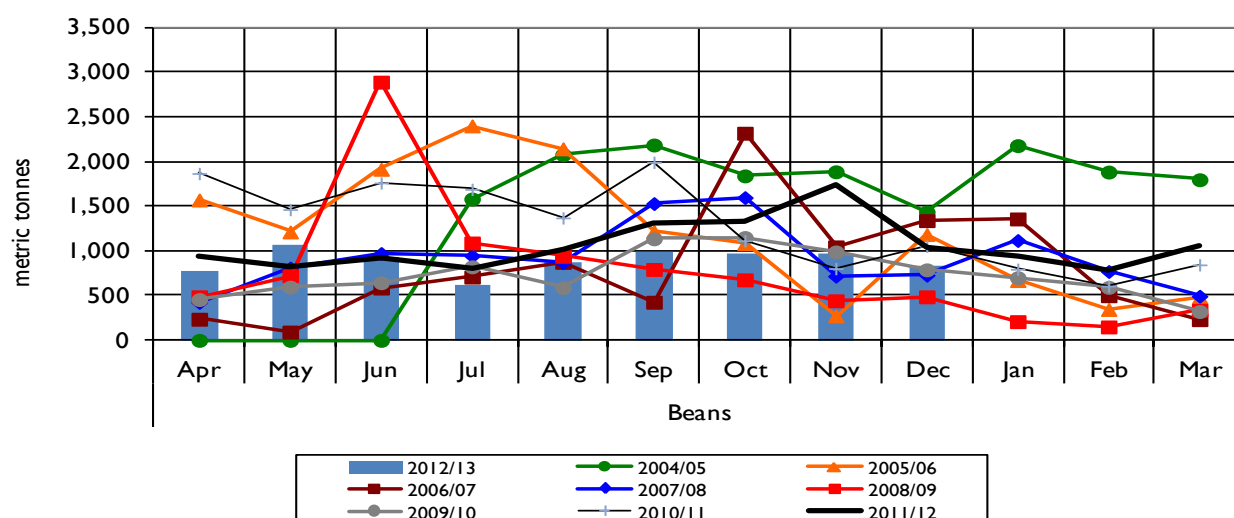
Table 5. Informal cross border BEAN trade by source and destination country (MT)

Source	Destination	Total 05/06 season	Total 06/07 season	Total 07/08 season	Total 08/09 season	Total 09/10 Season	Total 10/11 Season	Total 11/12 Season	Sep—Dec 2011	Sep-Dec 2012	Cumulative April 2011 - Dec- 2011	Cumulative April2012 - Dec 2012
Malawi	Mozambique	76	269	149	19	328	12	240	189	148	189	191
Malawi	South Africa	0	0	270	0	0	0	0	0	0	0	0
Malawi	Tanzania	0	0	169	6	6	423	10	0	0	0	0
Malawi	Zambia	19	268	338	124	52	91	81	34	155	67	200
Malawi	Zimbabwe	0	0	480	0	0	0	0	0	0	0	0
Mozambique	Malawi	2,741	2,798	2,375	3,045	2,619	6,950	3,419	1503	86	2673	990
Mozambique	Zambia				151	152	0	0	0	0	0	2
Mozambique	Zimbabwe	4	8	13	29	38	106	5	3	8	4	13
South Africa	Zimbabwe	325	83	11	6	17	255	141	48	39	111	78
Tanzania	Malawi	2,459	3,646	3,468	2,749	622	1,460	2,956	1707	894	2246	1397
Tanzania	Zambia	472	588	1,058	946	1,099	1,775	2,751	973	1287	2217	2497
Zambia	DRC	8,231	2,422	2,487	1,880	3,548	3,788	2,547	751	909	2005	2147
Zambia	Mozambique				0	90	188	154	55	67	127	122
Zambia	Tanzania	0	2	0	0	86	122	281	105	121	186	304
Zambia	Zimbabwe	16	69	170	280	143	209	106	36	26	91	60
Total Traded (MT)		14,343	10,153	10,988	9,236	8,800	15,380	12,690	5404	3738	9915	8001

Table 5 and Figure 6 summarize informal cross border bean trade trends. Bean trade declined compared to levels recorded throughout the 2011/12 marketing year. The September – December cumulative total of 3738MT is about 41 percent lower than the amounts traded over the same period last year. Traded volumes of beans were generally stable ranging from the highest of 980 MT recorded in September to 833MT in December. The December 2012 trade is 44 percent lower than the 1038MT recorded last December. The reasons for the lower traded volumes of beans this season are not immediately evident, but one reason could be that many households harvested stocks that are just adequate for own consumption. Over the September to December, trends show dominance in bean flows between Tanzania/ Zambia, Zambia/DRC and Tanzania/Malawi borders. Elsewhere beans traded at much lower volumes (below 300 MT). Tanzania ended the year with the highest export share (48 percent), followed by Zambia (33 percent), and Mozambique (13 percent). The largest informal importer of beans with a total share of 30percent was Malawi; most of these were from Mozambique and Tanzania. Zambia and the DRC followed with import shares of 27percent each. Zambia's imports were from Tanzania, while those to the DRC were from Zambia.

Trends in Volumes of Bean Traded by Month and Year

Figure 6: Recorded Volumes of Informal Cross Border BEAN Trade: 2004/05 to 2012/13



Annex 1: Trade Tables

Table 6: Informal Cross Border trade in Maize (MT)

Source	Destination	2005/06 Season	2006/07 Season	2007/08 Season	2008/09 Season	2009/10 Season	Apr-Jun 10	Jul-Sep 10	Oct-Dec 10	Jan-Mar 11	2010/11 Season	Apr-Jun 11	Jul-Sep 11	Oct-Dec 11	Jan-Mar 12	2010/11 Season
Tanzania	Zambia	13,556	6,260	4,980	2,449	4,103	1,388	1,891	1,235	520	5,034	702	2,299	3,125	447	6,573
Zambia	Zimbabwe	182	299	433	350	15,726	0	0	0	0	0	0	0	0	0	0
Zambia	Malawi	419	378	2,500	5,388	533	182	334	0	0	515	0	0	0	0	0
Zambia	Tanzania	-	7	4	15	288	106	81	68	52	307	86	188	254	369	897
Malawi	Zambia	81	202	1,779	1,293	311	111	114	125	93	444	75	713	102	100	990
Zambia	DRC	4,682	9,481	33,424	4,588	11,126	3,288	3,793	3,063	2,610	12,754	2,591	2,817	2,415	1,829	9,652
Mozambique	Malawi	71,218	77,394	56,078	54,223	49,137	11,887	9,333	1,423	914	23,557	11,257	8,439	5,587	5,073	30,356
Malawi	Tanzania	944	2,928	1,581	239	7,718	2,364	4,077	351	281	7,073	2,691	11,851	1,849	861	17,252
Tanzania	Malawi	84,862	1,888	1,888	2,910	89	14	0	85	162	261	27	0	0	0	27
Mozambique	Zimbabwe	5	2,085	11	178	1,810	1	51	3	0	55	1	2	5	1	10
Mozambique	Zambia	49	1,269	2,113	864	5,539	943	3,223	3,261	914	8,341	840	1,647	1,799	316	4,602
Malawi	Mozambique	133	591	3,755	203	7,144	556	1,510	5,386	19,758	27,209	10,487	31,666	16,244	992	59,388
Zambia	Mozambique	55	2	0	60	204	230	78	101	174	583	165	189	167	719	1,239
Zimbabwe	Mozambique	85	294	129	2	12	0	4	6	0	10	0	0	0	0	0
South Africa	Zimbabwe	1,688	49	47	2,663	3,122	2,277	2,159	2,660	2,334	9,430	2,151	2,387	1,831	1,863	8,232
Total Traded (MT)		177,959	103,127	108,679	75,426	106,862	23,347	26,647	17,767	27,812	95,574	31,081	62,215	33,377	12,570	139,243

Table 7: Informal Cross Border trade in Rice (MT)

Source	Destination	2005/06 Season	2006/07 Season	2007/08 Season	2008/09 Season	2009/10 Season	Apr-Jun 10	Jul-Sep 10	Oct-Dec 10	Jan-Mar 11	2010/11 Season	Apr-Jun 11	Jul-Sep 11	Oct-Dec 11	Jan-Mar 12	2011/12 Season
Tanzania	Zambia	641	557	397	625	549	179	192	193	189	753	238	304	399	467	1,408
Malawi	Tanzania	135	1,217	1,568	291	1909	229	174	0	0	403	429	441	203	576	1,648
Tanzania	Malawi	912	4	100	154	0	0	320	0	0	320	0	0	0	0	0
Zambia	DRC	12,629	1,697	6,746	9,334	3660	731	393	339	376	1,839	312	358	348	255	1,274
Zambia	Malawi	0	0	30	0	7	0	0	0	0	0	0	0	0	0	0
Malawi	Zambia	31	74	2,360	990	2607	62	79	60	0	201	0	0	0	0	0
Zambia	Zimbabwe	106	803	3,312	1,386	568	126	163	201	106	595	67	62	90	62	281
Mozambique	Malawi	1,691	1,718	444	690	588	226	15	0	9	250	372	4	4	724	1,104
Malawi	Mozambique	12	1	822	58	518	34	160	268	460	921	60	224	962	431	1,677
Mozambique	Zimbabwe	399	850	1,028	1,958	276	20	62	37	29	148	43	35	35	30	143
South Africa	Zimbabwe	64	82	33	25	215	198	202	301	553	1254	153	185	338	238	914
Total Traded (MT)		16,620	7,003	17,434	15,511	10,898	1,804	1,761	1,397	1,722	6,684	1,682	1,622	2,388	2,792	8,485

Annex 1 (continued)

Table 8: Informal cross border trade in beans (MT)

Source	Destination	2005/06 Season	2006/07 Season	2007/08 Season	2008/09 Season	2009/10 Season	Apr-Jun 2010	Jul-Sep 2010	Oct-Dec 2010	Jan-Mar 2011	2010/11 Season	Apr-Jun 2011	Jul-Sep 2011	Oct-Dec 2011	Jan-Mar 2012	2011/12 Season
Tanz	Zambia	472	588	1,058	946	1,099	641	342	397	396	1,775	772	696	749	534	2,751
Zambia	Tanz	0	2	0	0	86	34	26	27	36	122	45	56	86	95	281
Zambia	DRC	8,231	2,422	2,487	1,881	3,548	1,296	1,026	779	686	3,788	676	760	569	542	2,547
Malawi	Moz	76	269	149	19	328	2	3	7	0	12	0	1	188	51	240
Zambia	Zim	16	69	170	207	143	47	61	56	45	209	34	34	24	15	106
Moz	Malawi	2,741	2,798	2,375	2,321	2,619	2,452	2,681	1,273	544	6,950	720	876	1,076	746	3,419
Malawi	Tanz	0	0	169	6	6	122	262	0	38	423	0	0	0	10	10
Moz	Zim	4	8	13	29	38	1	102	3	1	106	0	1	3	1	5
Malawi	Zambia	19	268	338	124	52	25	25	27	15	91	16	24	27	14	81
Tan	Malawi	2,459	3,646	3,468	2,749	622	399	392	302	367	1,460	343	613	1,290	710	2,956
RSA	Zim	325	83	11	6	17	25	87	54	89	255	42	28	41	30	141
Total Traded (MT)		14,343	10,153	10,988	8,288	8,558	5,043	5,006	2,926	2,217	15,192	2,683	3,131	4,101	2,776	12,690

ACTESA -COMESA, Lusaka, Zambia; FEWS NET Southern Africa Regional Office, Pretoria South Africa; and UN World Food Programme Regional Bureau for Southern Africa, Johannesburg South Africa

Current Border Monitoring Sites

