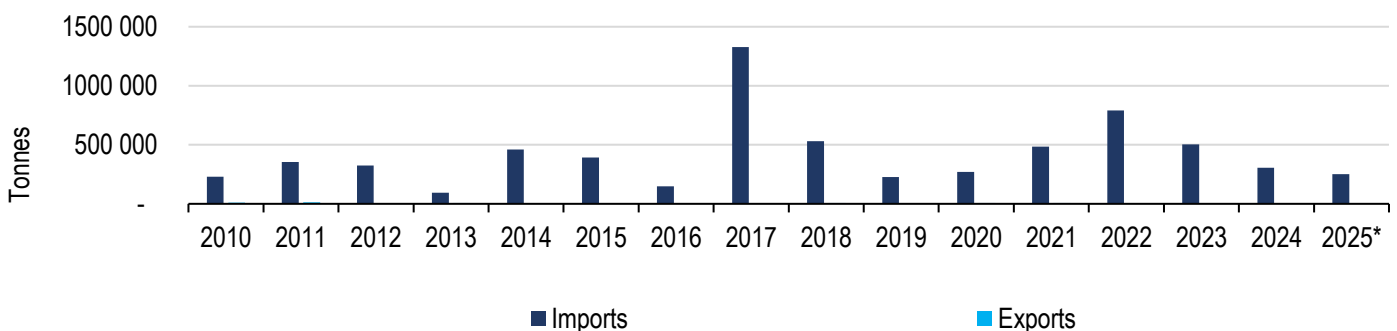


## Kenya's maize production has recovered, but the country will continue to be a net importer

- Similar to the improvement in maize production witnessed in South Africa, Zambia, Zimbabwe, and other countries in the Southern African region, Kenya's 2024-25 maize crop has also shown signs of recovery. The latest estimate by the United States Department of Agriculture (USDA) places the country's harvest at 4.4 million tonnes. This is up 15% from the previous season due to both the expansion in area plantings and improved yields. Consequently, imports are expected to decline by 17% to 250,000 tonnes in the 2025-26 marketing year (this corresponds with the 2024-25 production season). The typical maize suppliers to Kenya in times of need include Tanzania and Uganda. It is likely that when domestic supplies have lessened, Kenya will still rely on these countries to supplement its domestic supplies.
- South African maize exporters are unlikely to participate in the Kenyan market due to the country's reduced annual maize needs and its long-standing ban on imports of genetically modified crops. Over 80% of South Africa's maize is genetically modified, which is typically used as a non-tariff barrier by various African countries. Still, South Africa's maize exports are likely to focus on the neighbouring SACU countries, including Zimbabwe, and the Far East markets in the coming months. The East African region is unlikely to be a primary focus for many South African maize exporters.
- In essence, the recovery in Kenya's maize production, along with reduced imports, also implies that domestic food security conditions will likely improve this year compared to previous years of drought, during which consumers faced higher staple grain prices. Still, the country will remain a net importer of maize. The outlook for 2026 will largely depend on the upcoming season. So far, the weather prospects look encouraging for another better season for Kenya.

### Exhibit I: Kenya's maize trade



Source: Trade Map, USDA and Agbiz Research

Note: Each calendar year represents a marketing year; for example, the calendar year 2025 represents the 2025-26 marketing year.