



RESILIENT GRAIN MARKETS: **UNLOCKING AFRICA'S FOOD SECURITY POTENTIAL**

2ND-4TH, OCTOBER 2025 | ZANZIBAR, TANZANIA

Main Session 5

Smart & Seamless Logistics:

**Optimizing Grain Supply Chains from Farm to Regional
and Global Markets**

**Session
Sponsors:**



**Arnaud
Petit**

Executive Director
International Grains
Council (IGC)



RESILIENT GRAIN MARKETS: UNLOCKING
AFRICA'S FOOD SECURITY POTENTIAL

Optimizing logistics in the grains trade



International Grains Council



RESILIENT GRAIN MARKETS: UNLOCKING
AFRICA'S FOOD SECURITY POTENTIAL



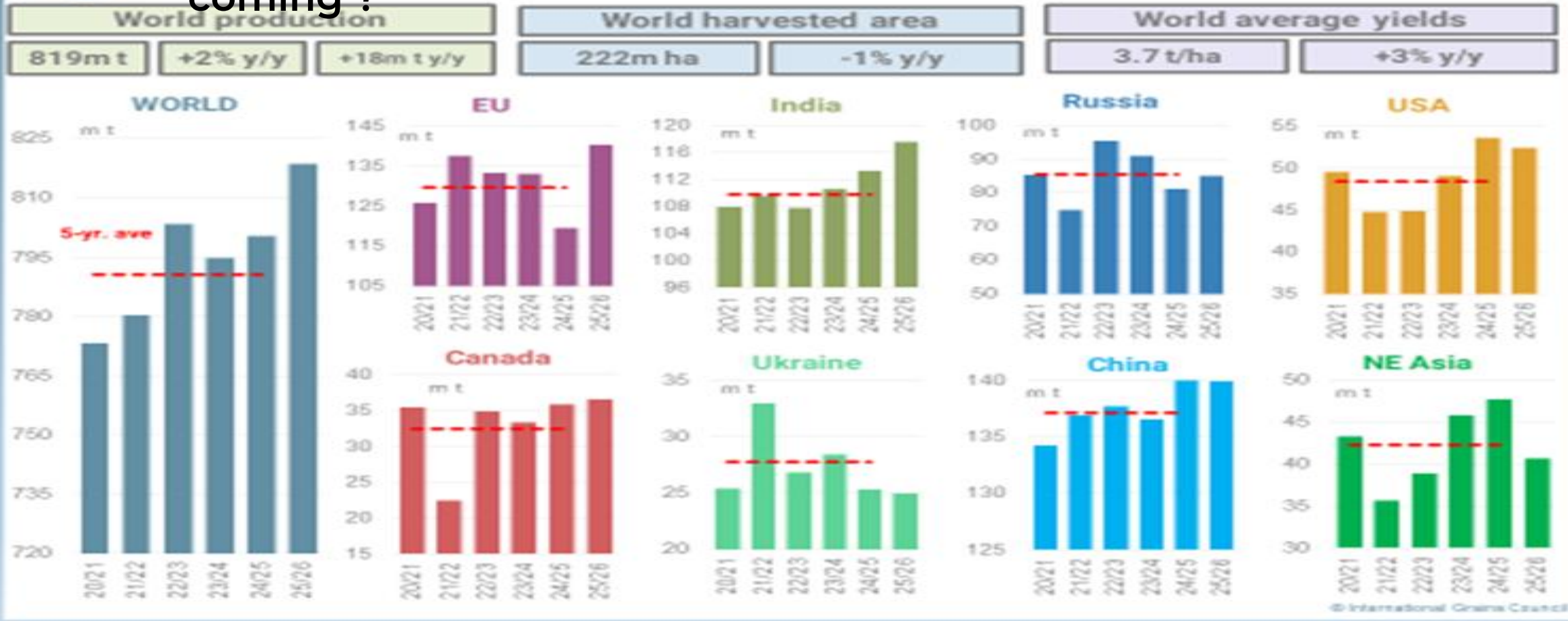
Global market: Are we facing a new cycle ?

International Grains Council





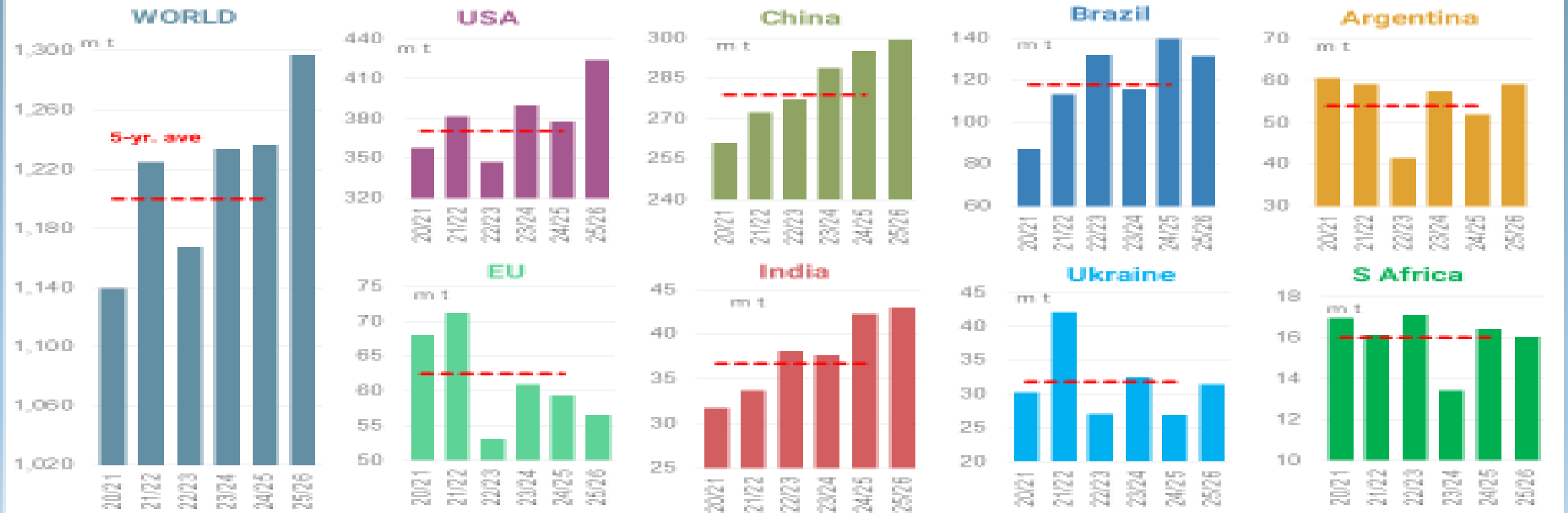
Wheat: big crops getting bigger in 2025/26 and more upside coming ?





Maize: Global production approaching 1.3 b T

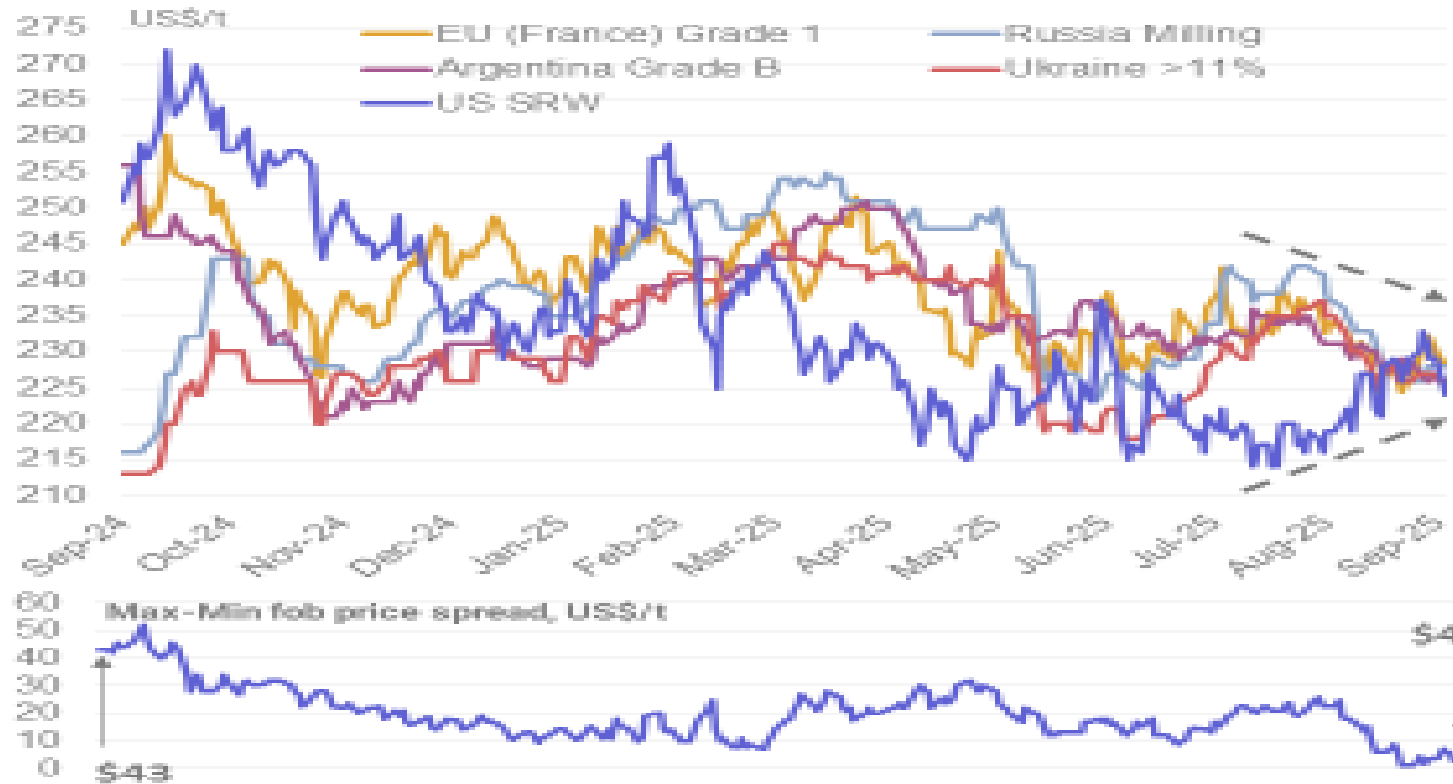
World production			World harvested area		World average yields	
1,297mt	+5% y/y	+60mt y/y	211m ha	+3% y/y	6.2 t/ha	+2% y/y





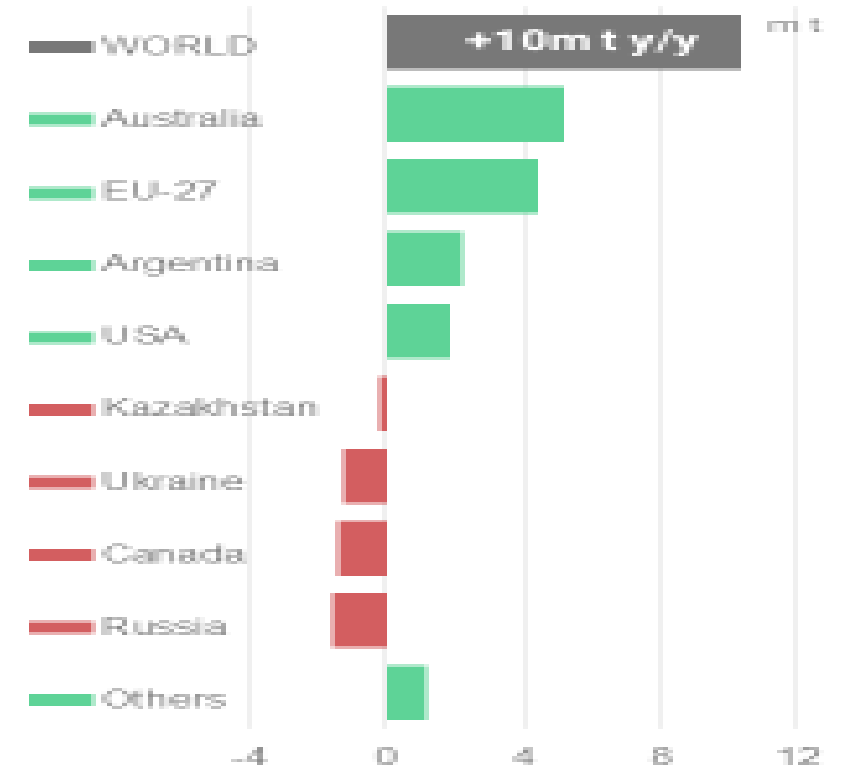
Wheat: Fob competition fierce and set to intensify : Logistics will make the difference !

Spot nominal export (FOB) prices



Note: Fob prices may not be directly comparable due to different specifications

Changes in exports in 24/25 (Jul/Jun)



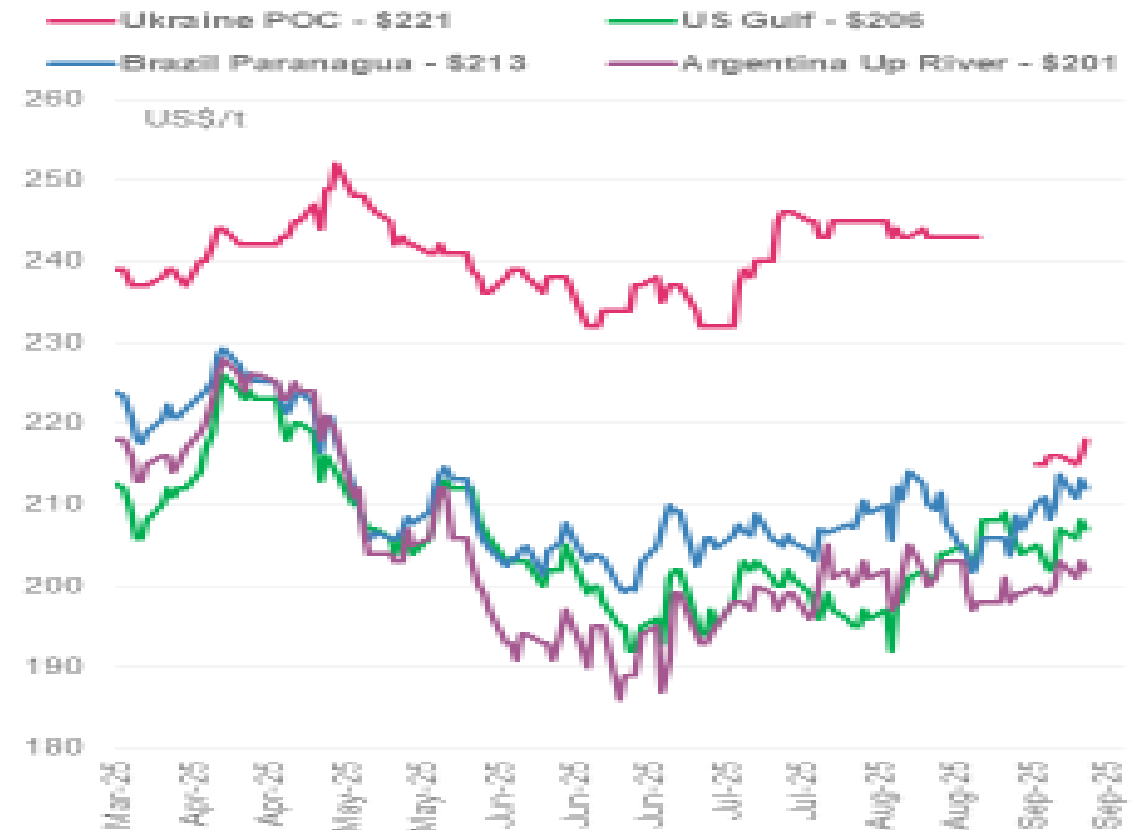


Maize price: showing some resistance !

IGC GOI maize sub-Index



Indicative fob quotations (6 months)



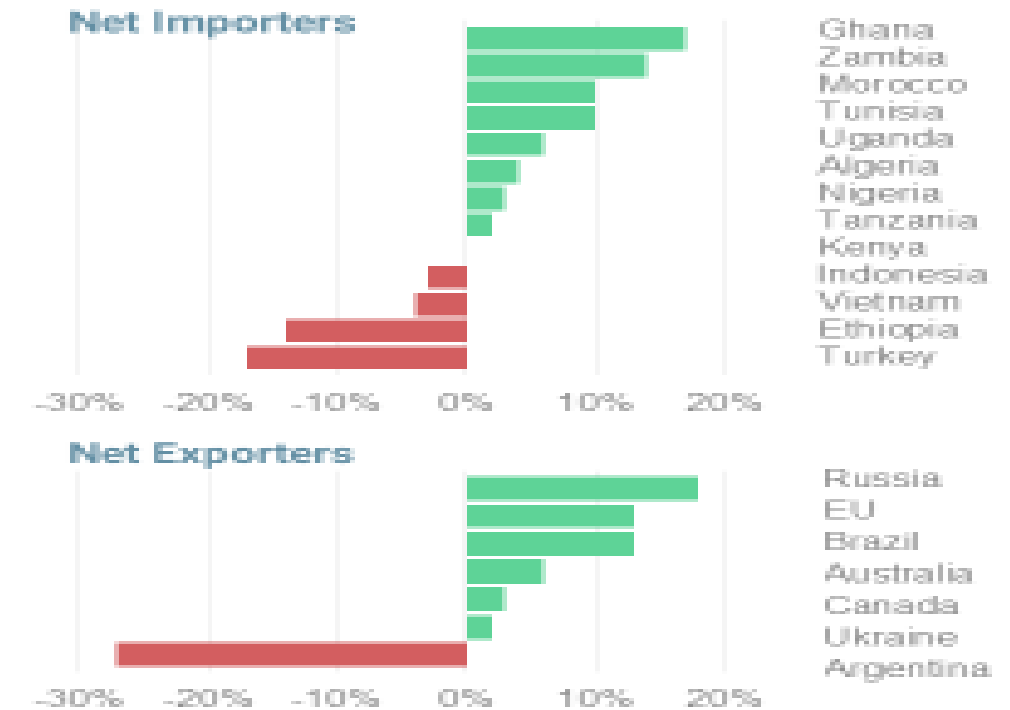


Currency movement: Good news for importers ?

US Dollar Index

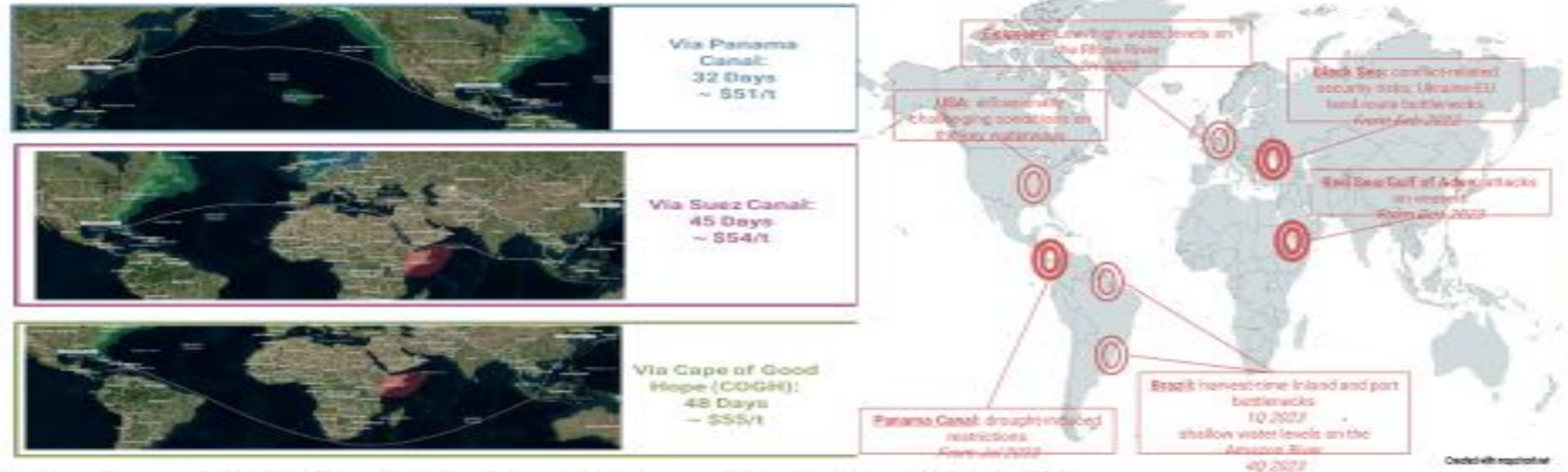


Local currencies vs. USD
(change since Jan 2025)



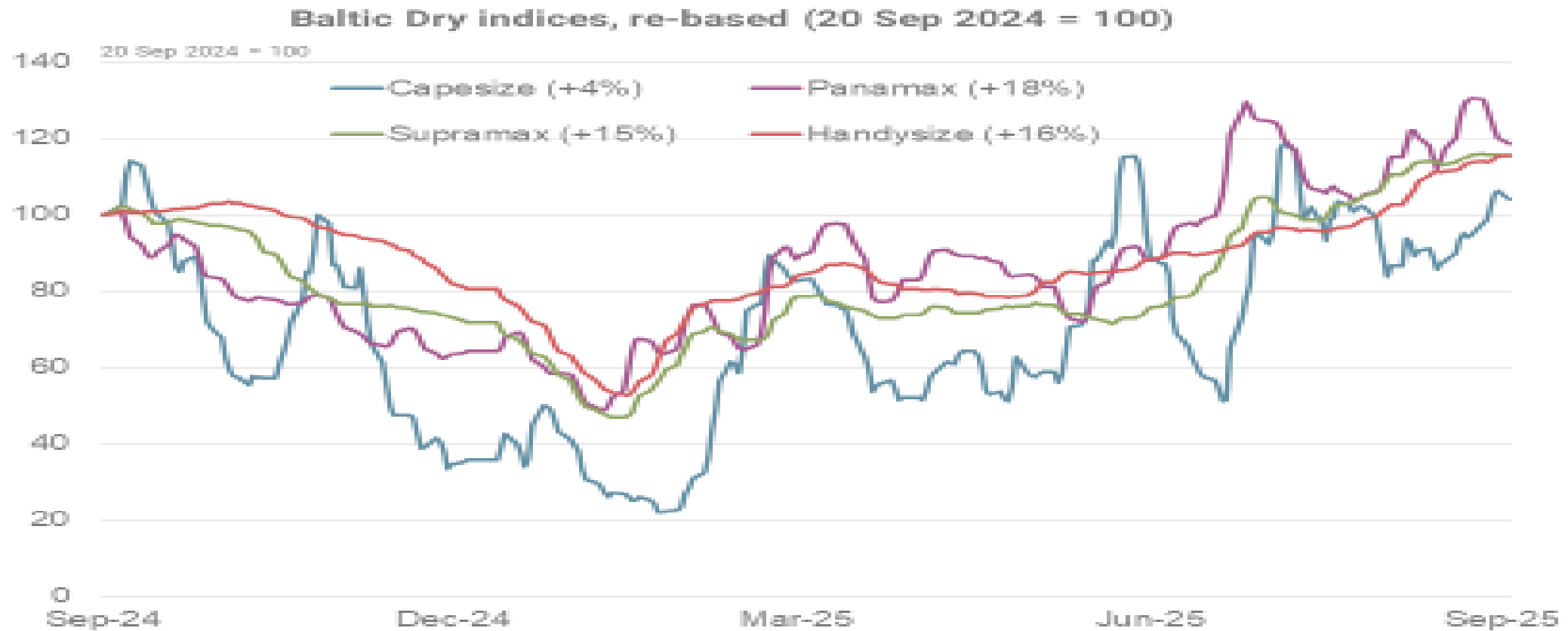


Maritime logistics: Time Nexus Cost !





Time charter Rate on its rise !





RESILIENT GRAIN MARKETS: UNLOCKING
AFRICA'S FOOD SECURITY POTENTIAL

Maritime logistics trend in Eastern Africa



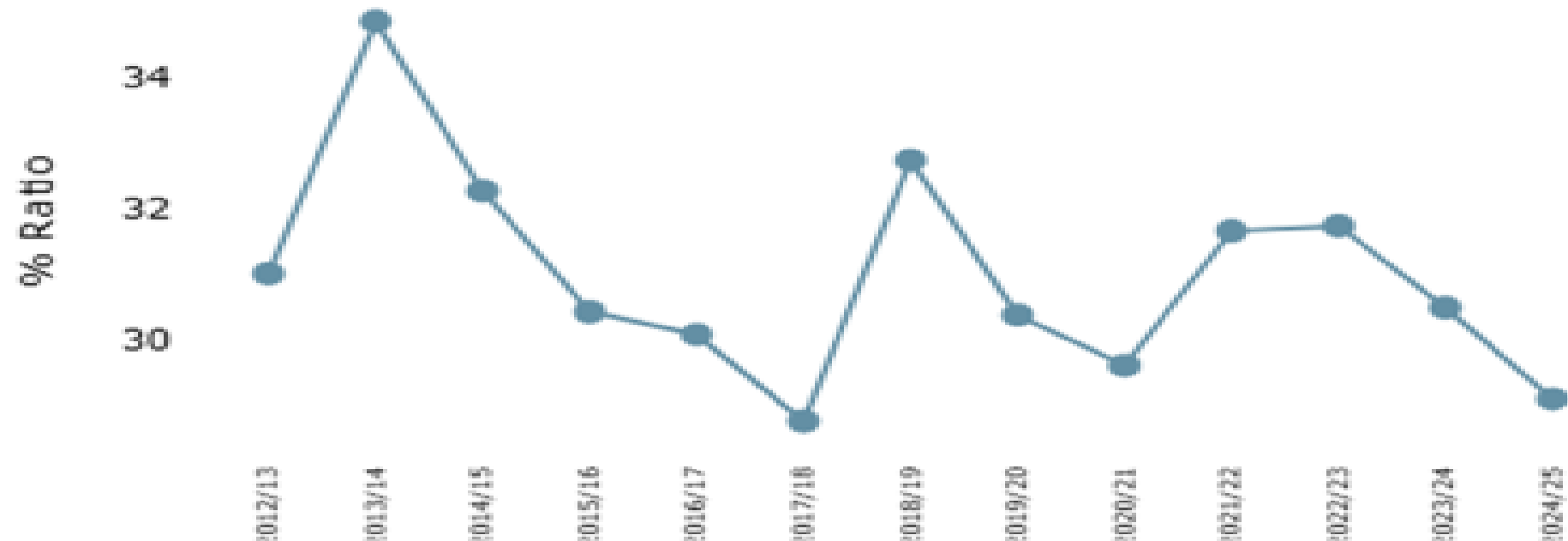
International Grains Council





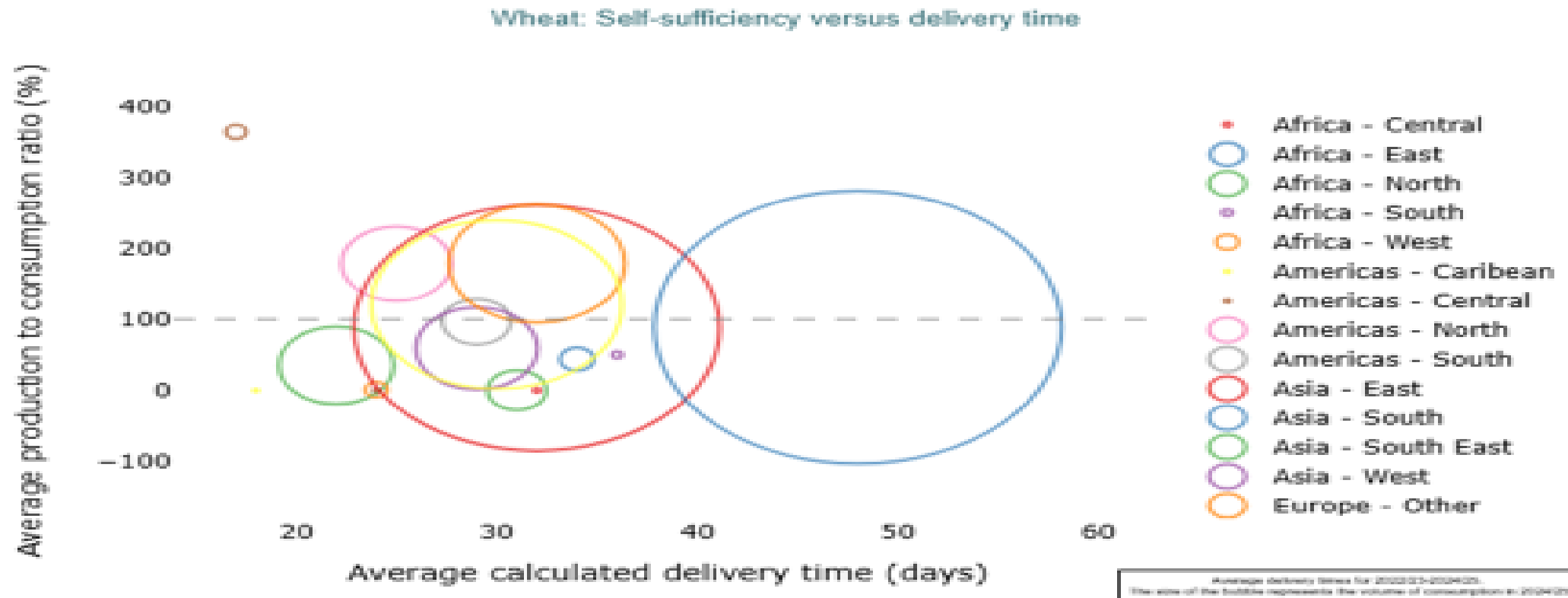
An increasing reliance on global wheat market !

Wheat: Production to consumption ratio in Africa - East





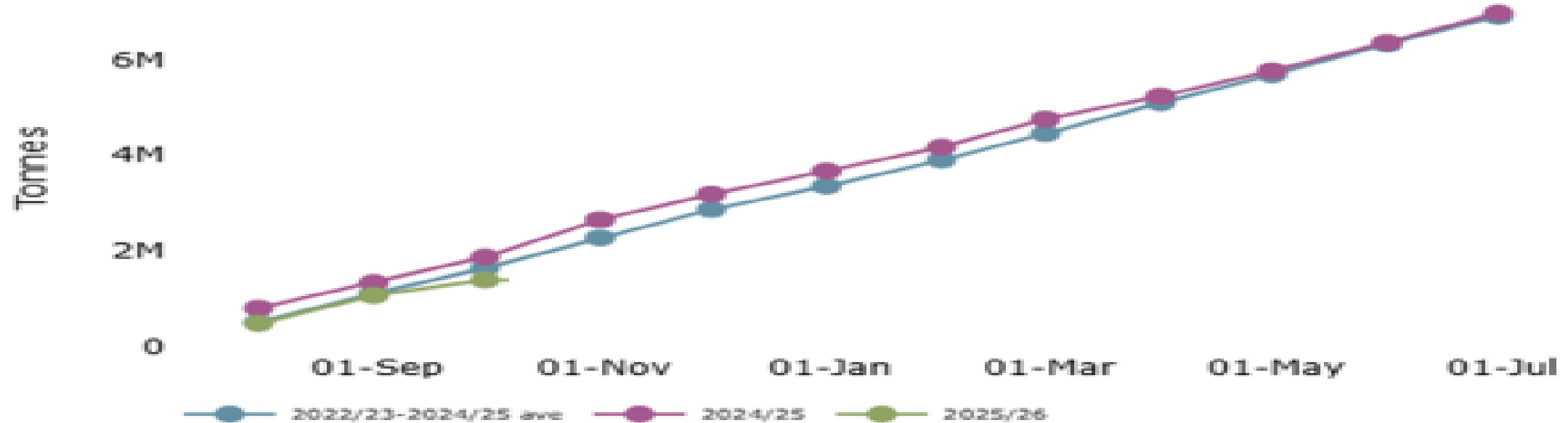
Exposure of East Africa to logistical issue !





Regular imports along the marketing year

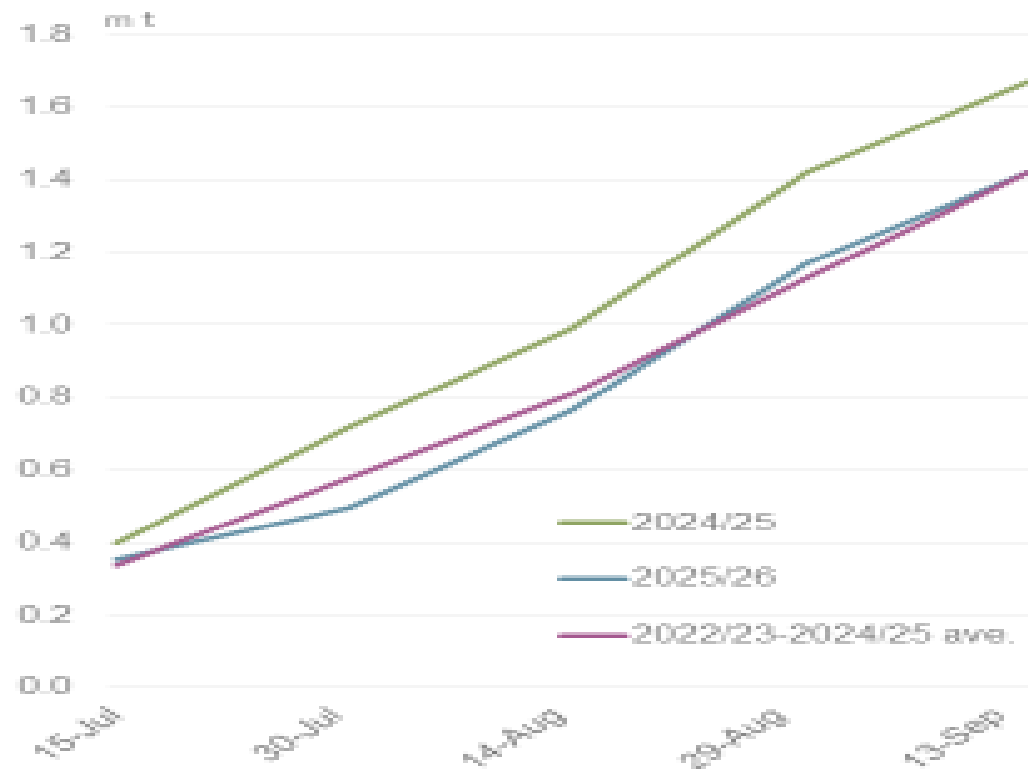
Wheat: Cumulative Exports
WORLD to Africa - East



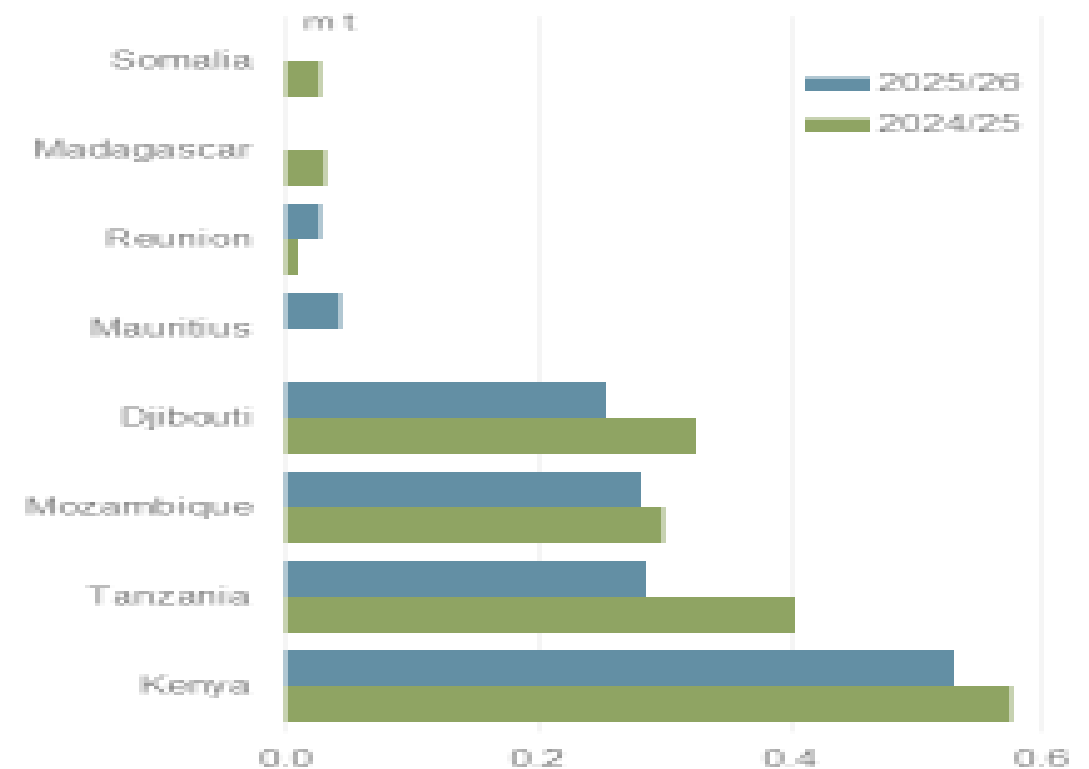


Low start season for the main importing countries

Cumulative wheat imports by East Africa



1 Jul – 15 Sep 2025 cumulative wheat imports



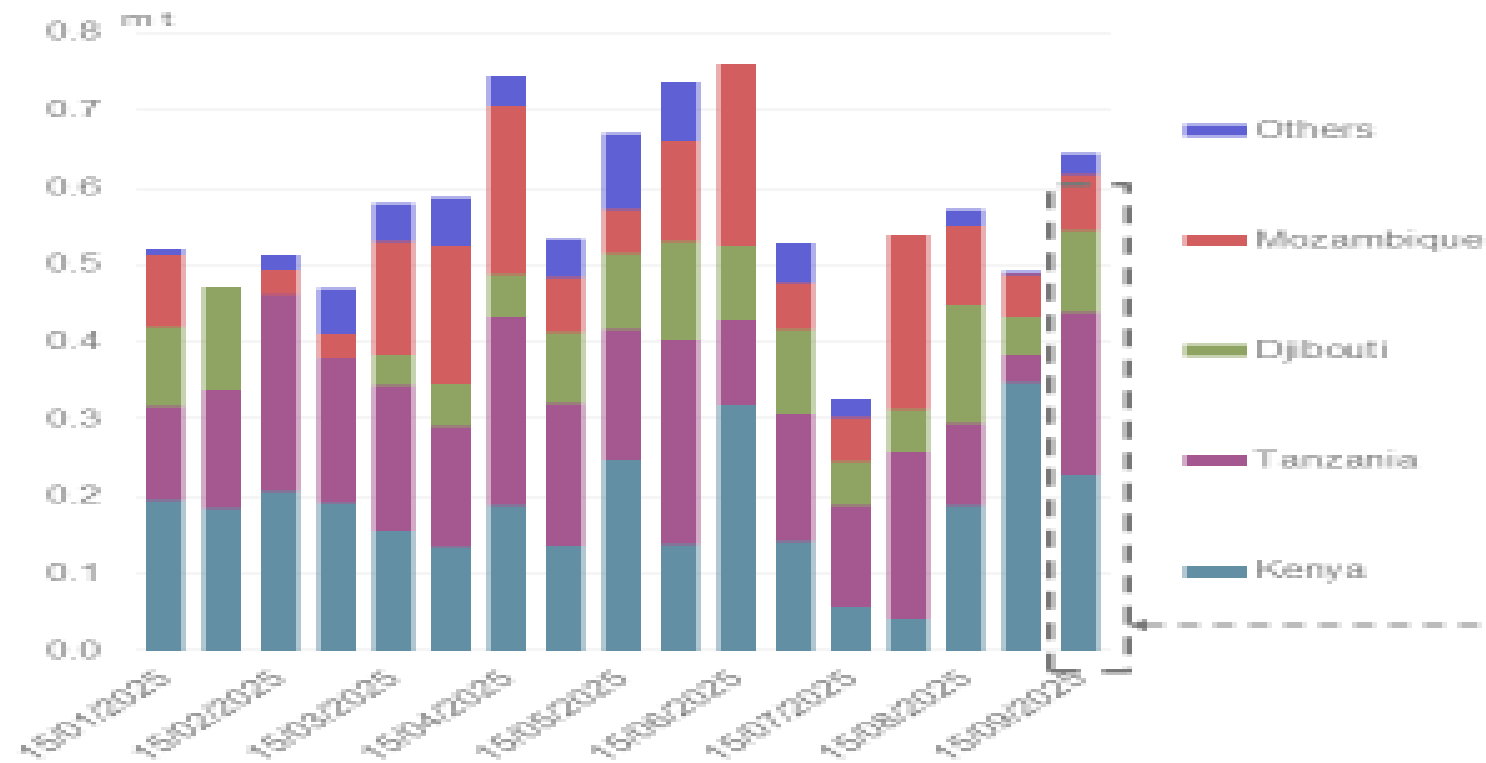
Source: Kpler, IGC analysis and calculations

© International Grains Council

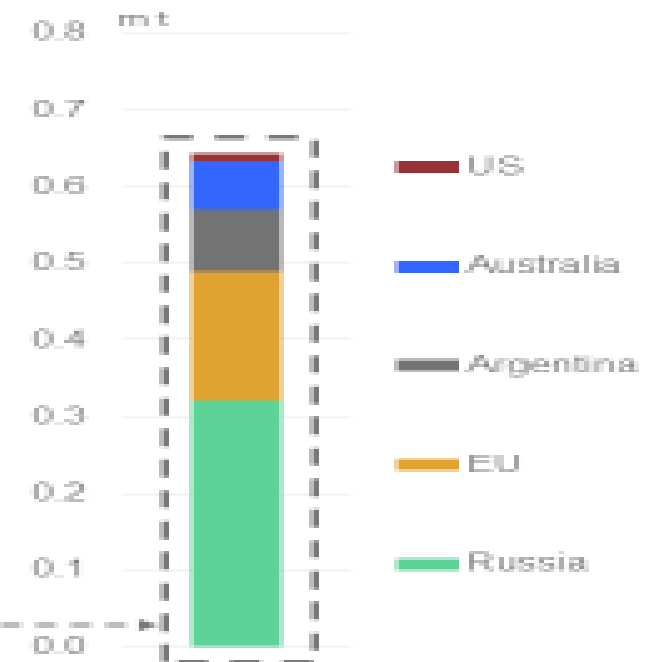


Line up (cargoes in transit)

Wheat line-ups (cargoes in transit) to East Africa



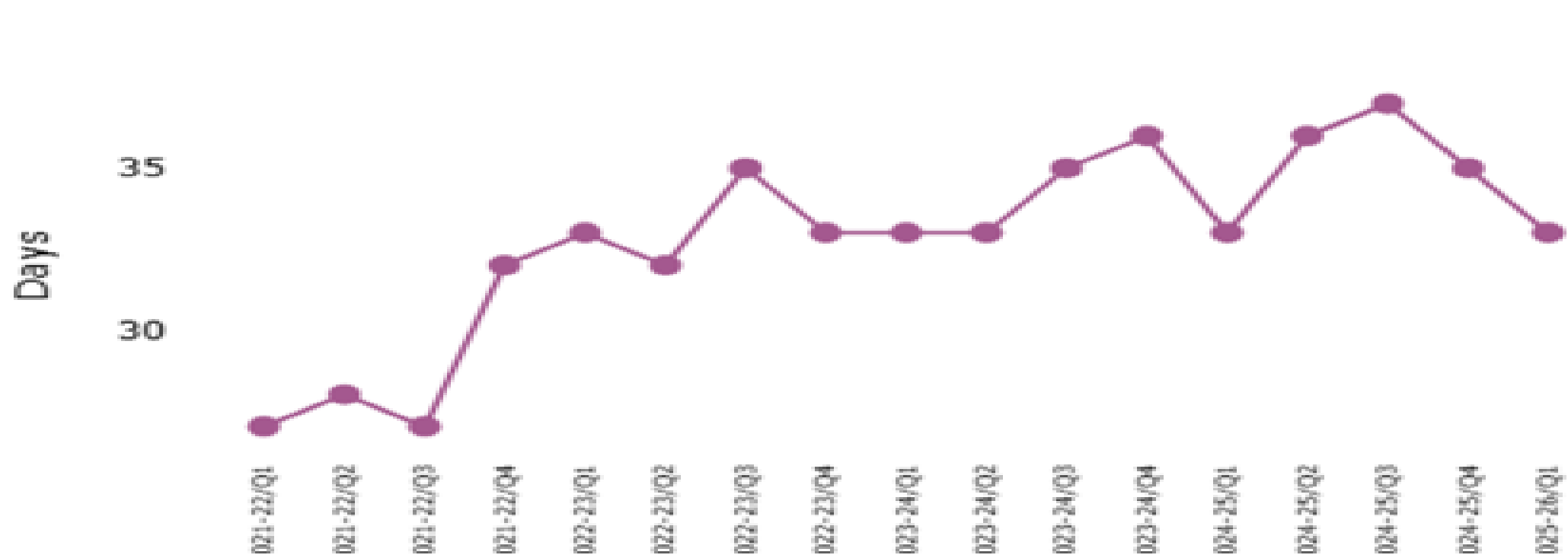
Line-up 15/09/2025, by origin





But delivery time increased by
30%

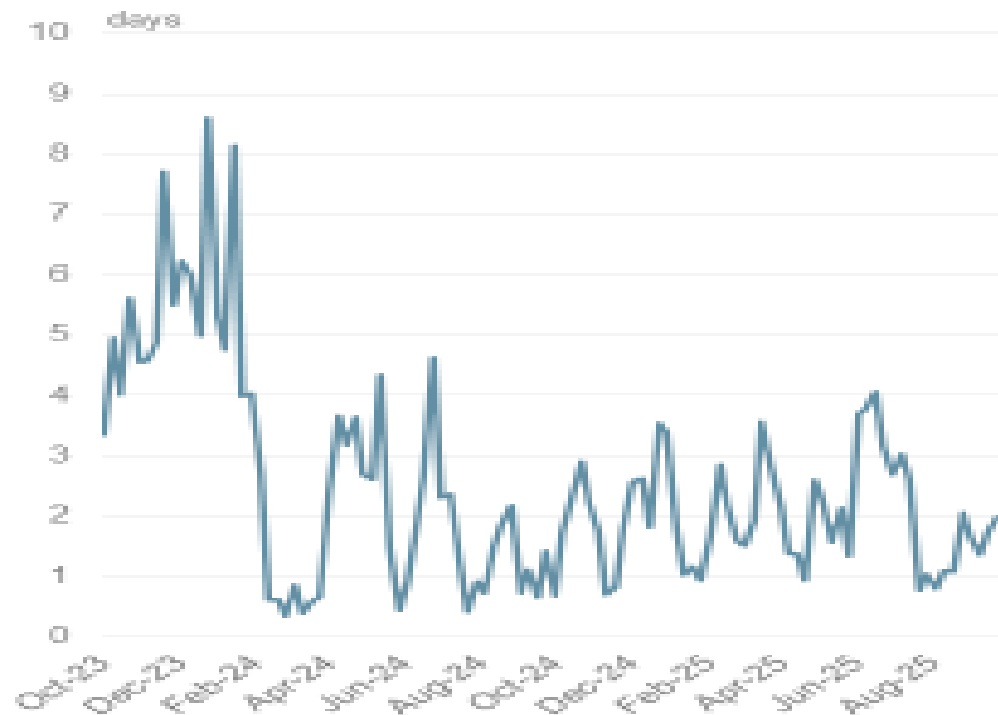
Wheat: Delivery time for Africa - East, past 3 years





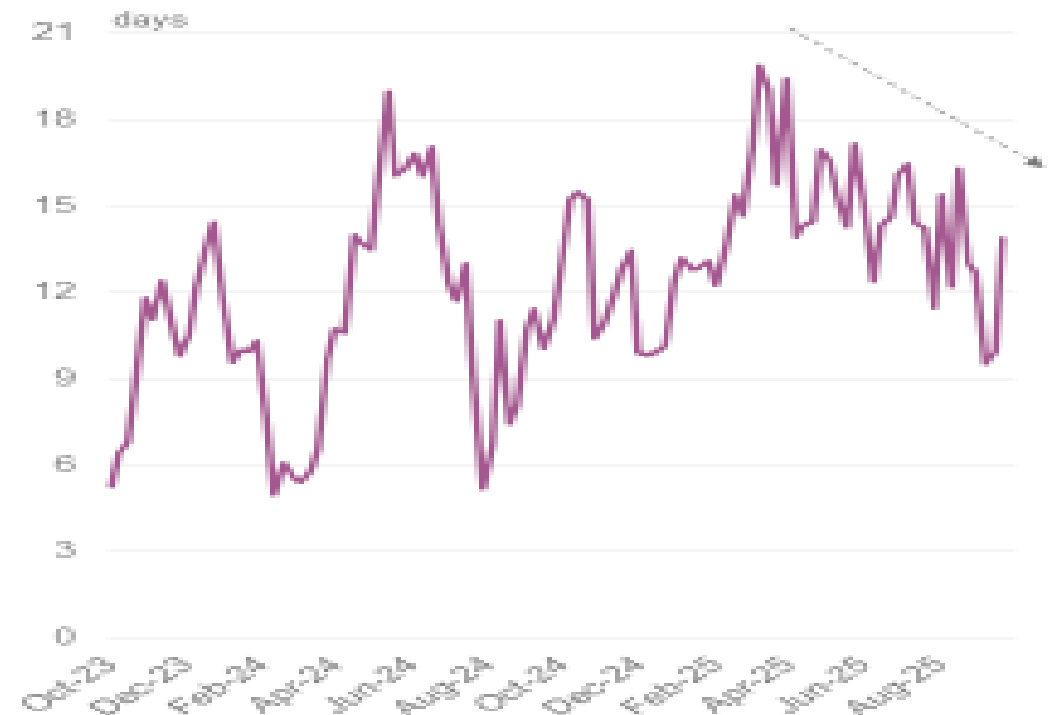
Waiting time at Port Mombasa and Dar Es Salam

Port of Mombasa: Average waiting times



Source: Kpler

Port Dar Es Salam: Average waiting times



© International Grains Council



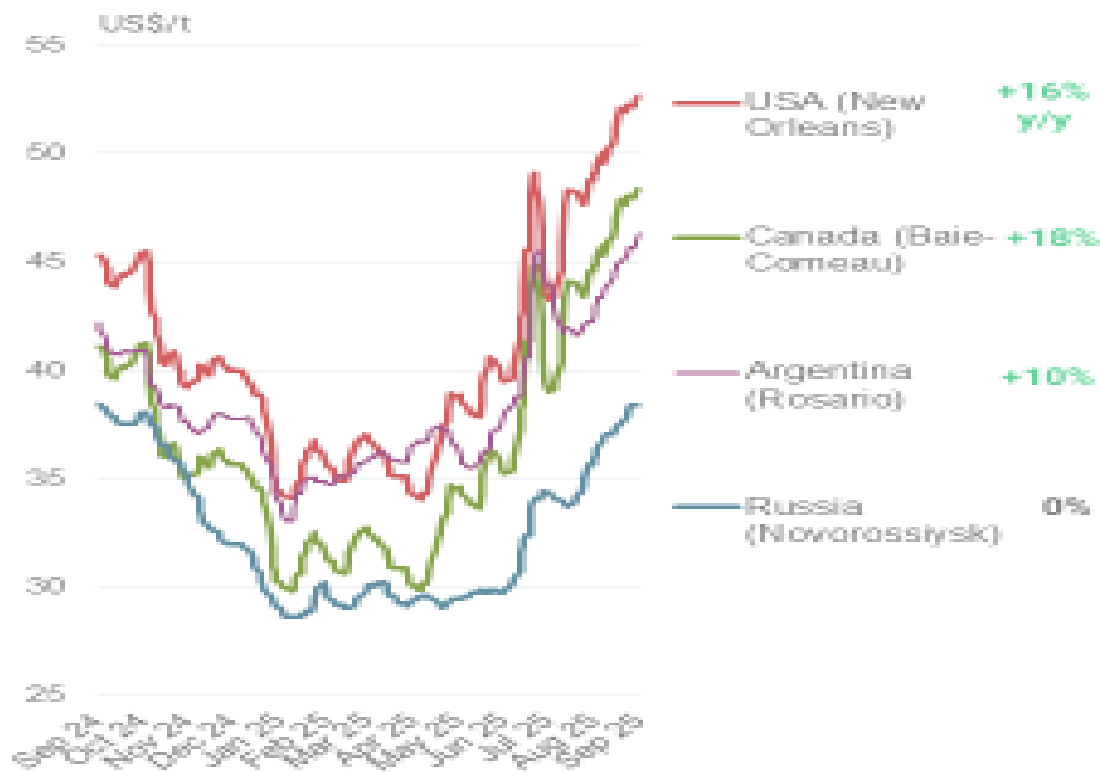
Freight rate represents 15% of the C&F price



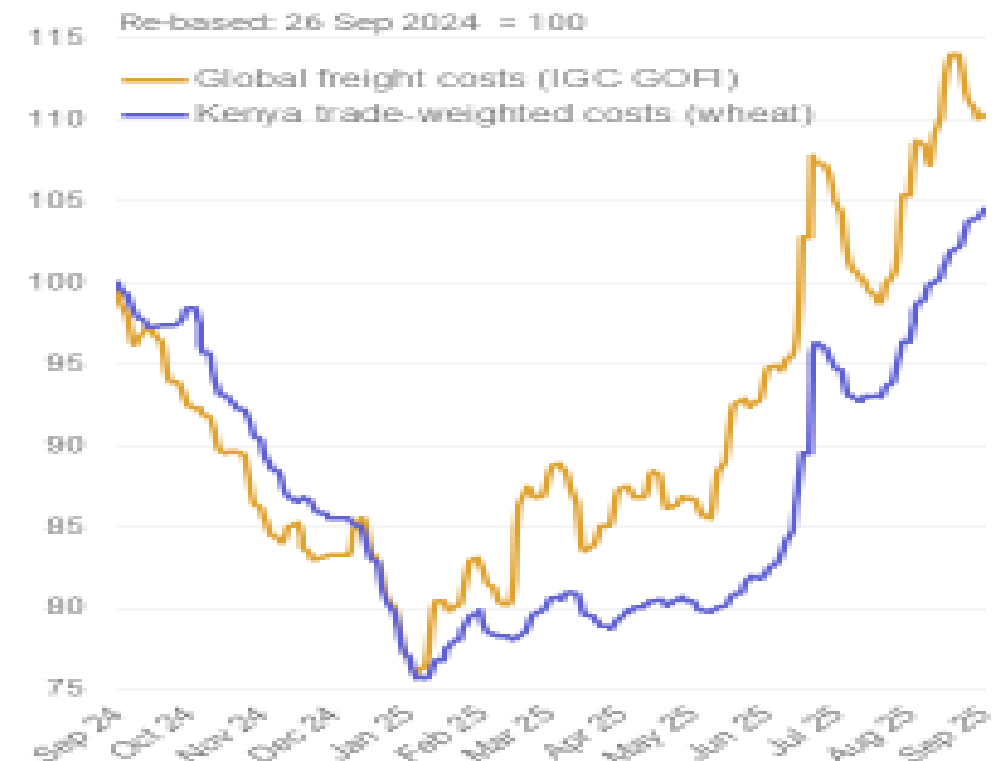


Freight rates to Kenya: Quick raise but still below the GOFI !

Nominal freight rates to Kenya (Mombasa)



Rates to Kenya vs. Global costs (IGC GOFI)

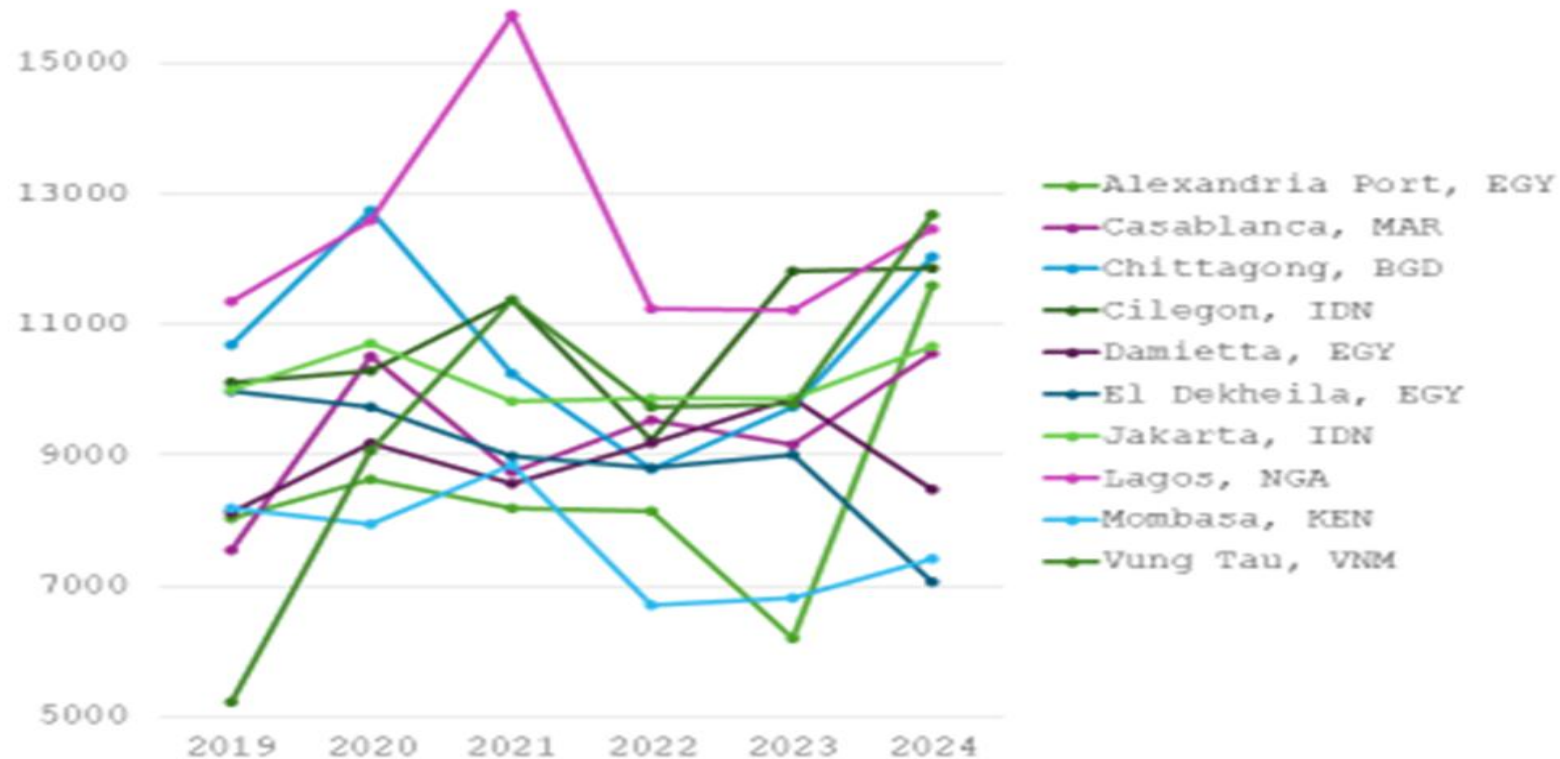


IGC calculated nominal freight rates, HSS basis (heavy grains, soyabeans, sorghums). Values do not represent market fixtures.

© International Grains Council



Top ten dynamic ranking of importing ports (wheat)



Restricted Use - A usage restraint



RESILIENT GRAIN MARKETS: UNLOCKING
AFRICA'S FOOD SECURITY POTENTIAL



Toward a global mapping of the global grains trade



C0507CAF.html

THANK YOU.

