



SAUTI TRADE INSIGHTS COVID-19 BULLETIN

HOW HAS CROSS-BORDER TRADE BEHAVIOUR
CHANGED DURING THE COVID-19 PANDEMIC?

APRIL 2022

Sauti.

SAUTI TRADE INSIGHTS

April 2022

Over the past two years, we have seen all sectors of the world economy change at a pace that is unprecedented prior to the COVID-19 pandemic. Sauti has been capturing the impact of the pandemic on the cross-border traders of East Africa through a series of COVID-19 bulletins to guide cross-border traders, development policy practitioners, and solution designers in the faster-than-ever changing landscape of trade in East Africa.

This COVID-19 bulletin aims to illustrate the changing state of trade in East Africa. Leveraging Sauti's East Africa's embeddedness with traders, we present the 2021 Q4/2022 Q1 behavioral and user data from our regional network of trade and market information platforms.

For policymakers, solution designers, and researchers, user interactions with our platforms provide us with a unique and far-reaching perspective into the business behavior of traders in the East African community. When combined with Sauti's demographic survey data, we have unprecedented opportunities for higher frequency disaggregated analytics and drill-downs to identify specific opportunities for the trade facilitating community.

This bulletin includes data on Kenyan, Rwandan, Tanzanian, and Ugandan traders. In the case of Tanzania, cross-border trade increased or remained high compared to the last quarter. However, we found that in every other country, cross-border trade decreased or remained low. Cross-border traders' destinations are consistently lower than pre-pandemic levels in Rwanda and Kenya, indicating that COVID-19 is likely having persistent effects on the levels of activity within the East African trade sector.

In [our last report](#), we highlighted the trends that demonstrate that Kenyan women traders are returning to pre-pandemic levels of trade activity at a faster rate than men. This report shows a similar trend in Uganda. While Kenyan women's participation in cross-border trade has equalized with men, in Uganda cross-border trade destinations made up 31% of market destinations for women - compared to 13% for Uganda's male traders.

Our unique data insights suggest that the cross-border trade sector in East Africa is slowly but surely making progress in recovering from the worst effects of the pandemic. However, our data suggest a mixed rate of recovery between countries, which emphasizes the need for specialized data insights from each country. Sauti will continue its work on collecting and visualizing unique, disaggregated data to provide post-pandemic insights for research and interventions on the cross-border trade environment in East Africa.

As we did in the previous reports, we also have made our data available through [Sauti's Trade Insights data portal](#). The Trade Insights data portal provides an innovative resource for supporting research, solution designs, and near real-time context mapping. This report also uses our improved data weighting methodology to more accurately represent the empirical behavioral patterns of East Africa's cross-border traders. See the technical detail section for links to explore the data.

LANCE HADLEY

Chief Executive Officer

For more information, please contact:

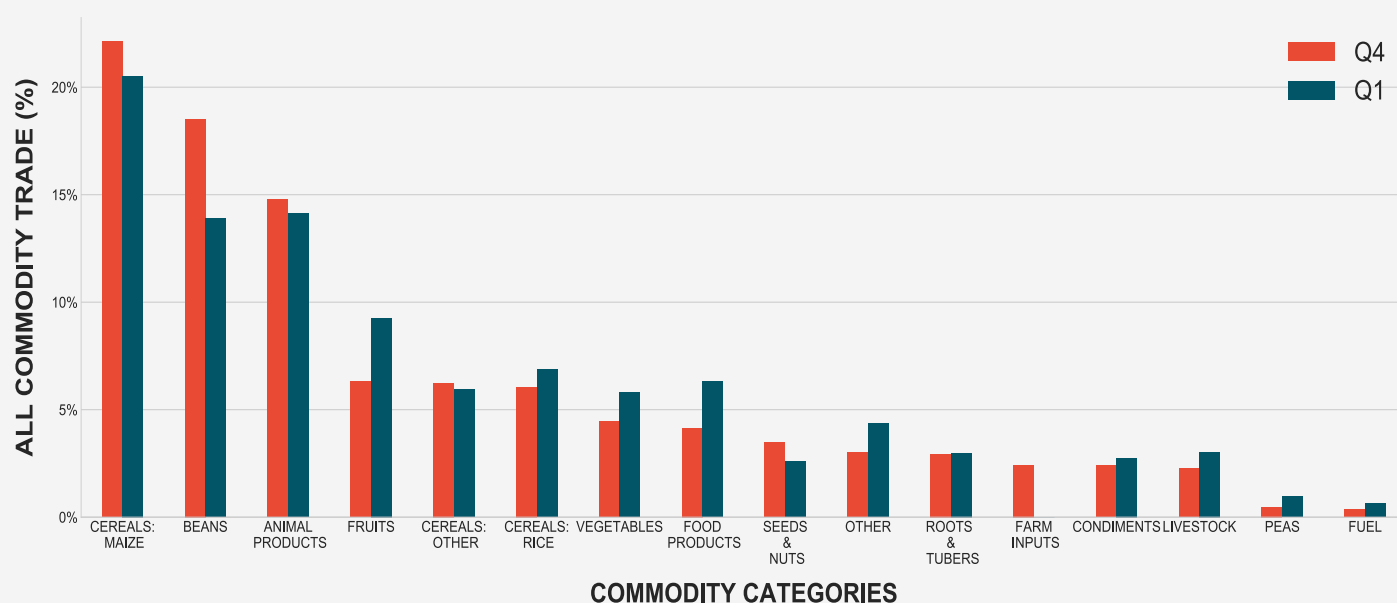
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SUMMARY OF FINDINGS

Q4 2021/Q1 2022 AT A GLANCE

MOST POPULAR COMMODITIES IN EAST AFRICA, BY CATEGORIES Q4 2021/Q1 2022

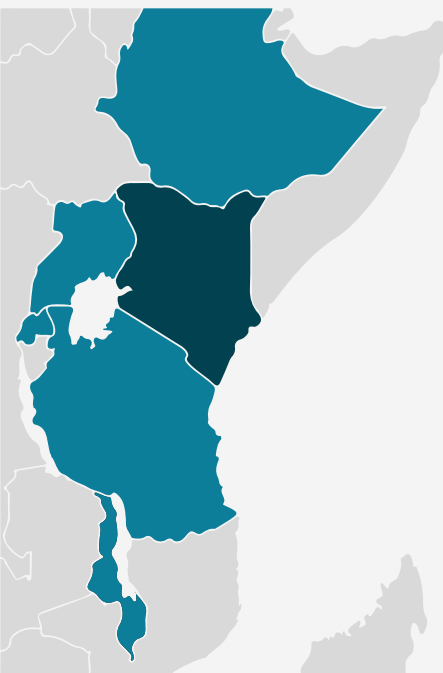


The three most popular commodity categories of Q1 were maize cereals (avg. 20.52%), animal products (avg. 14.14%) and beans (avg. 13.90%).

However, beans was found to have experienced the largest drop in trade between Q4 of 2021 and Q1 of 2022 with a 4.6pp decline from 18.52% to 13.9%.

This was followed by farm inputs which declined by 2.4 percentage points (pp).

Fruits experienced the most notable rise in trade activity between quarters, with a 3pp increase. Another increase by 2.2pp was seen in the buying and selling of food products.



MOST POPULAR TRADE DESTINATIONS FOR KENYAN TRADERS

The majority (77.9%) of Kenyan traders have kept their business within the borders of Kenya during Q4 of 2021 and Q1 of 2022, with the next most popular trade destination being Uganda (6.8%), followed by Tanzania (5.5%). There were 4.1pp less Kenyan traders buying and selling between Q4 of 2021 and Q1 of 2022.

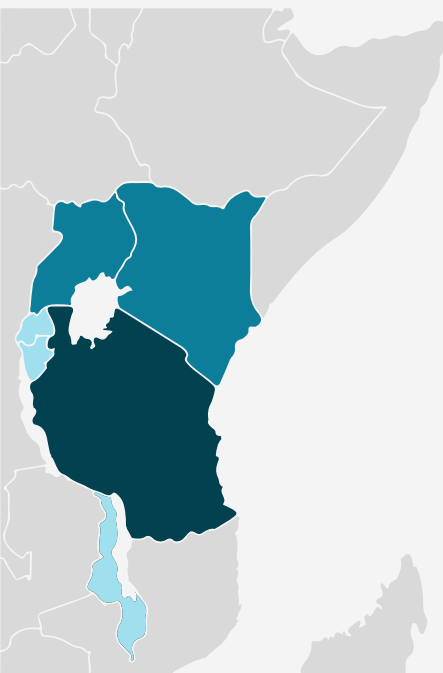
KENYA	UGANDA	TANZANIA	RWANDA	BURUNDI	ETHIOPIA
77.9%	6.8%	5.5%	2.6%	0.1%	3.4%
CHANGE IN TRADE DESTINATIONS FROM Q4 2021 TO Q1 2022					
+4.1pp	-3.1pp	+0.9pp	+0.5pp	-4.8pp	-0.1pp



MOST POPULAR TRADE DESTINATIONS FOR RWANDAN TRADERS

A large majority of Rwandan traders (84.9%) have kept their business within the borders of Rwanda during Q4 of 2021 and Q1 of 2022. Ethiopia (4.0%) and Tanzania (4.0%) are the next most popular trade destinations for Rwandan traders buying and selling goods in these cross-border countries. Trading activities in Rwanda is noted to have increased by 1.9pp between Q4 of 2021 and Q1 of 2022.

RWANDA	TANZANIA	ETHIOPIA	UGANDA	KENYA	BURUNDI
84.9%	4.0%	4.0%	3.2%	3.2%	0.1%
CHANGE IN TRADE DESTINATIONS FROM Q4 2021 TO Q1 2022					
+1.9pp	+2.1pp	+3.4pp	-1.9pp	+0.04pp	-5.7pp



MOST POPULAR TRADE DESTINATIONS FOR TANZANIAN TRADERS

The majority (77.2%) of Tanzanian traders have kept their business within the borders of Tanzania during Q4 2021 and Q1 2022. However, a decline in trade by 3.8pp was experienced within Tanzanian borders between both quarters. The biggest decline in trade activity by Tanzanian traders was seen within Burundian borders with a drop in buying and selling by 4.6pp in Q1 of 2022 compared to Q4 2021.

TANZANIA	KENYA	RWANDA	UGANDA	BURUNDI	ETHIOPIA
77.2%	7.5%	3.9%	2.8%	0.0%	2.9%
CHANGE IN TRADE DESTINATIONS FROM Q4 2021 TO Q1 2022					
📉 -3.8pp	📈 +0.2pp	📈 +2.0pp	📈 +1.5pp	📉 -4.6pp	📈 +0.9pp



MOST POPULAR TRADE DESTINATIONS FOR UGANDAN TRADERS

The majority (83.9%) of Ugandan traders have kept their business within the borders of Uganda during Q4 2021/Q1 2022, with the next most popular cross-border trade destination being Kenya (8.7%), followed by Rwanda (1.7%). However, Ugandan traders trading in Kenya has decreased by 4.3pp between Q4 of 2021 and Q1 of 2022.

UGANDA	KENYA	TANZANIA	RWANDA	ETHIOPIA	BURUNDI
83.9%	8.7%	1.2%	1.7%	2.2%	0.0%
CHANGE IN TRADE DESTINATIONS FROM Q4 2021 TO Q1 2022					
📈 +3.5pp	📉 -4.3pp	📉 -0.7pp	📉 -0.8pp	📈 +1.6pp	📉 +1.0pp

MARKET LOCATIONS

CHANGE IN TRADE ACTIVITY IN
FROM Q4 2021 TO Q1 2022

LEGEND

- ↗ Percentage point (pp)
Positive change Q1 2022
compared to Q4 2021
- ↘ Percentage point (pp)
negative change Q1 2022
compared to Q4 2021
- No change Q1 2022
compared to Q4 2021

NAIROBI, KE

- ↘ -0.6pp Kenyan traders
- ↘ -0.1pp Tanzanian traders
- 0pp Ugandan traders

NAKURU, KE

- ↘ -0.2pp Kenyan traders
- 0pp Ugandan traders

MOMBASA, KE

- ↘ -0.2pp Kenyan traders
- 0pp Ugandan traders

MULINDI, RW

- 0pp Kenyan traders
- 0pp Rwandan traders

DAR ES SALAAM, TZ

- ↘ -0.8pp Kenyan traders
- ↘ -0.3pp Tanzanian traders
- ↗ +0.2pp Ugandan traders

IRINGA, TZ

- ↗ +0.3pp Tanzanian traders
- 0.0pp Rwandan traders
- ↗ +0.1pp Kenyan traders

IGANGA, UG

- ↗ +0.3pp Kenyan traders
- ↗ +0.3pp Ugandan traders

KAMPALA, UG

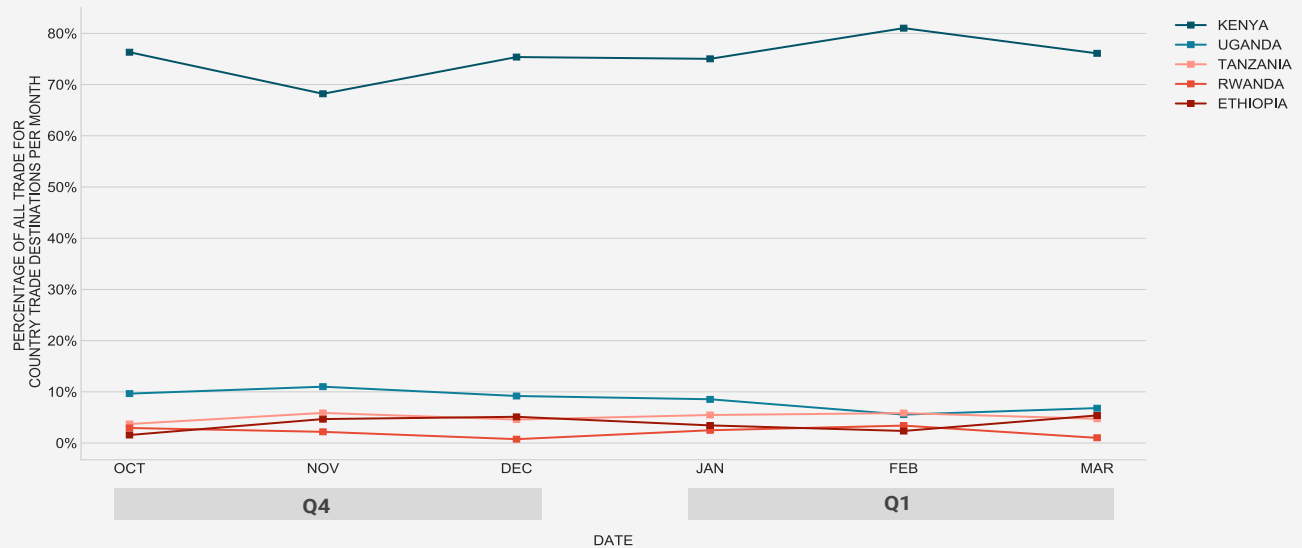
- ↘ -1.4pp Kenyan traders
- 0pp Tanzanian traders
- ↘ -0.1pp Rwandan traders
- ↘ -1.3pp Ugandan traders

IMPACT OF COVID-19 PANDEMIC

CROSS-BORDER TRADE MOVEMENT



TRADE DESTINATIONS FOR KENYAN TRADERS IN Q4 2021/Q1 2022



During Q4 of 2021 and Q1 of 2022, an average of 76.3% of Kenyan traders bought and sold goods within Kenya's local markets.

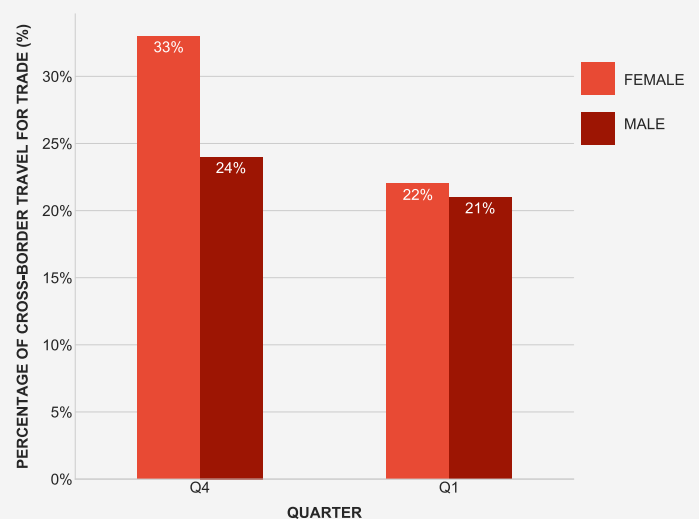
Domestic trading increased by 6pp between January and February, while the most notable drop in trading activities by Kenyans was observed in Uganda by 3.1pp between Q4 and Q1.

Cross-border trading remained relatively the same in Q4 of 2020 and 2021 while it decreased in Q1 2022 in comparison to previous years. Cross-border trading increased by 4.1pp between Q4 2021 and Q1 2022. Cross-border trading increased by 10.5pp for female traders and 3.3pp for male traders between Q4 2021 and Q1 2022.

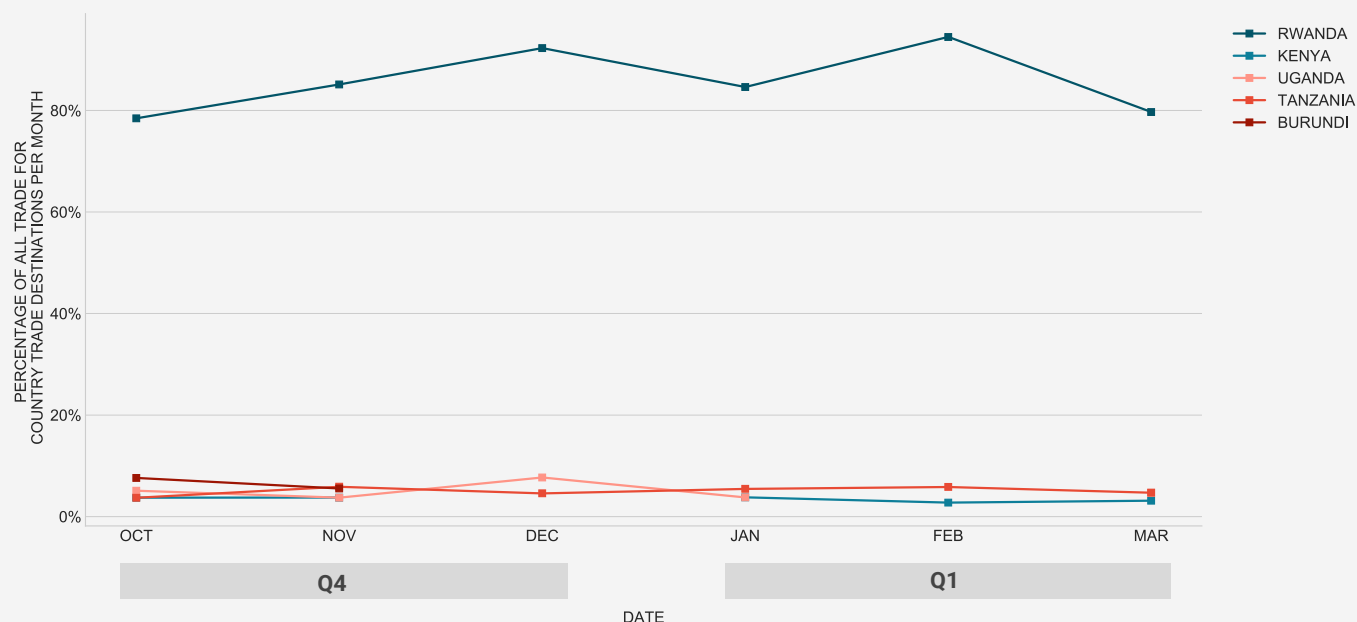
CROSS-BORDER TRADING FROM KENYA Q4/Q1 2019, 2020 & 2021



CROSS-BORDER TRADING FROM KENYA IN Q4 2021/Q1 2022



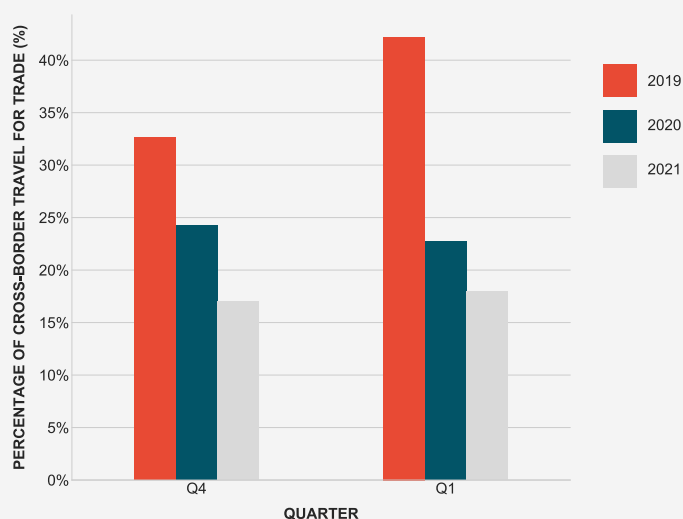
TRADE DESTINATIONS FOR RWANDAN TRADERS IN Q4 2021/Q1 2022



An average of 83.9% of Rwandan traders bought and sold goods within Rwanda's local markets during Q4 2021/Q1 2022. Crossborder trading remained low with an increase by 1.9pp between quarters.

Cross-border trading from Rwanda to Uganda decreased between Q4 2021 and Q1 2022 by 1.9pp. However, trading in Tanzanian, Ugandan, Kenyan and Ethiopian markets increased throughout both quarters.

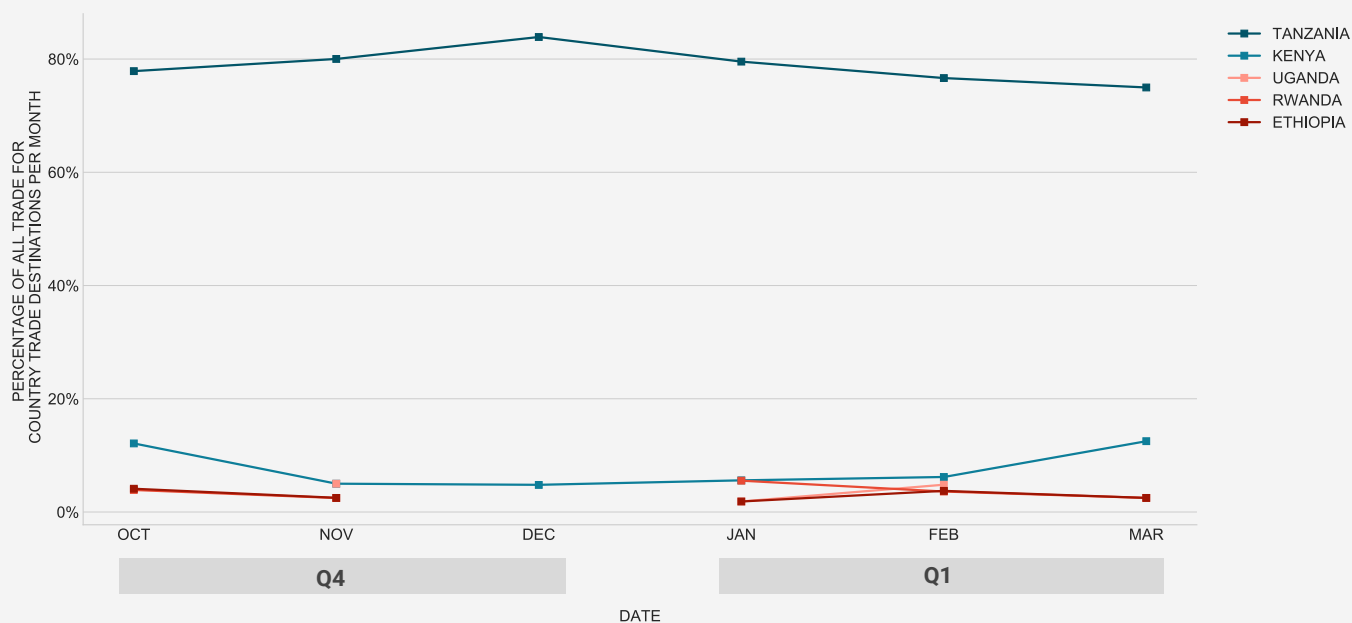
CROSS-BORDER TRADING FROM RWANDA IN Q4/Q1 2019, 2020 & 2021



Cross-border trading from Rwanda in 2021 was lower in Q4 compared to 2020 (-7.2pp), with a slight increase in Q1 2022 (+1.9pp).

Despite this increase between quarters, cross-border trading has not recovered to pre-COVID-19 levels, where cross-border trading in Q1 (42.3%) and Q4 (32.7%) of 2019 made up nearly one third of all trading activity from Rwandan traders

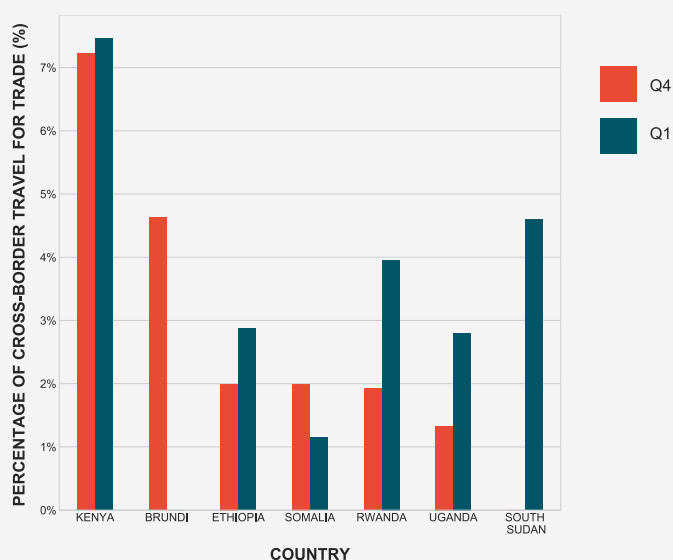
TRADE DESTINATIONS FOR TANZANIAN TRADERS IN Q4 2021/Q1 2022



An average of 77.2% of Tanzanian traders sold and bought within Tanzania's local markets between Q4 2021/Q4 2022. Although a peak was observed in January where local trade increased to 83.9%,

domestic trade declined by 3.8pp between quarters. Nevertheless, Kenya (7.5%) was the most popular trade destination for Tanzanian traders in Q4 2021 and Q4 2022 followed by Rwanda (3.95%).

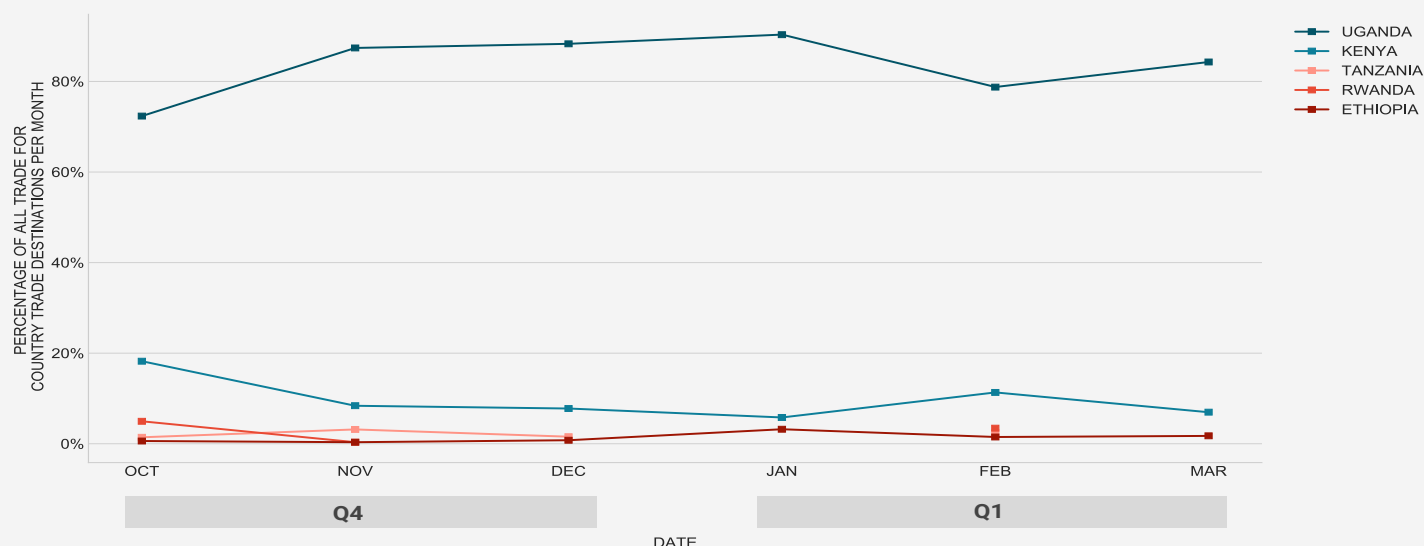
CROSS-BORDER TRADING FROM TANZANIA IN Q4 2021/Q1 2022



Cross-border trading from Tanzanian traders increased between Q4 2021 and Q1 2022 for most of the trade destinations. Trading in Q4 was significantly reduced in Malawi, Burundi and South Sudan while Ethiopia experienced some additional trade from Tanzanian traders in Q4.

Burundi saw the greatest drop (-4.6pp) from Tanzanian traders in Q1 2022 in comparison to Q4 2021. In contrast, cross-border trading was highest from Tanzania to Rwanda, with a raise by 2.0pp from Q4 2021 to Q1 2022.

TRADE DESTINATIONS FOR UGANDAN TRADERS IN Q4 2021/Q1 2022

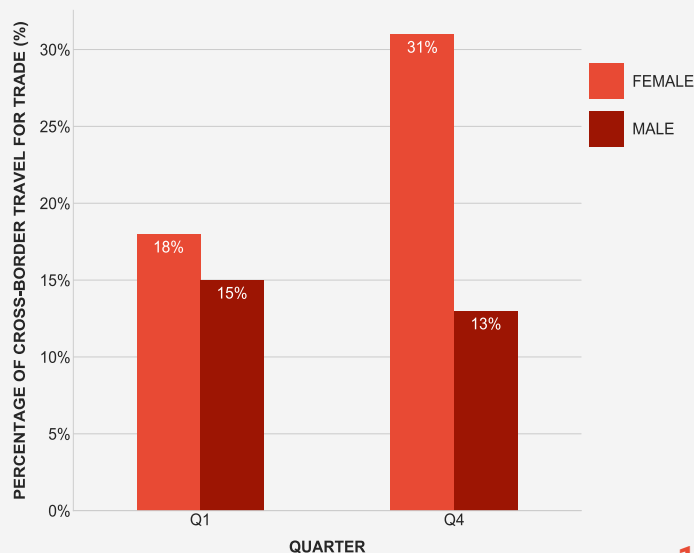
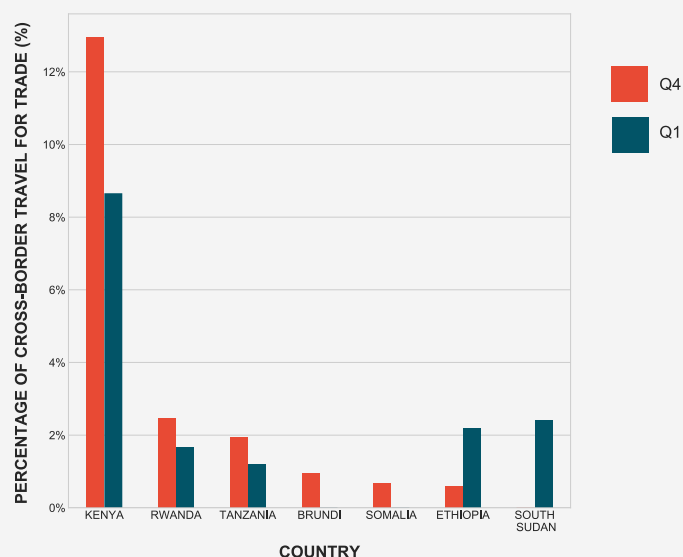


Most Ugandan traders in Q4 2021 and Q1 2022 traded in domestic markets, with local trade peaking at 90.3% in January. The second most popular trade destination in Q4 2021 and Q1 2022 was Kenya, with an average of 9.8% of Ugandan traders buying and selling goods in Kenyan markets.

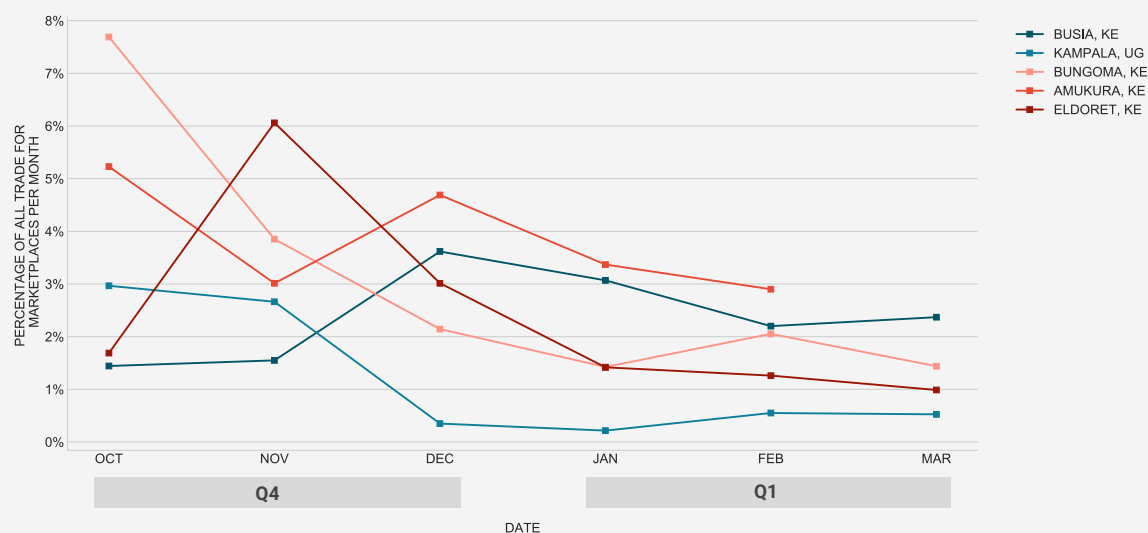
Trade in other cross-border destinations (Tanzania, Rwanda, and Burundi) over this time period remained relatively low.

Compared to the previous quarter, Kenya saw the largest decrease (-4.3pp) in cross-border trading from Uganda, followed by Brundi (-1.0), Rwanda (-0.8), Tanzania (-0.7), and Somalia (-0.7). In contrast, cross-border trading in South Sudan (+2.4pp) and Ethiopia (+1.6pp) increased slightly over this time period. Cross-border trading increased by 13.2pp for female traders and decreased by 2.5pp for male traders between Q4 2021 and Q1 2022.

CROSS-BORDER TRADING FROM UGANDA IN Q4 2021/Q1 2022



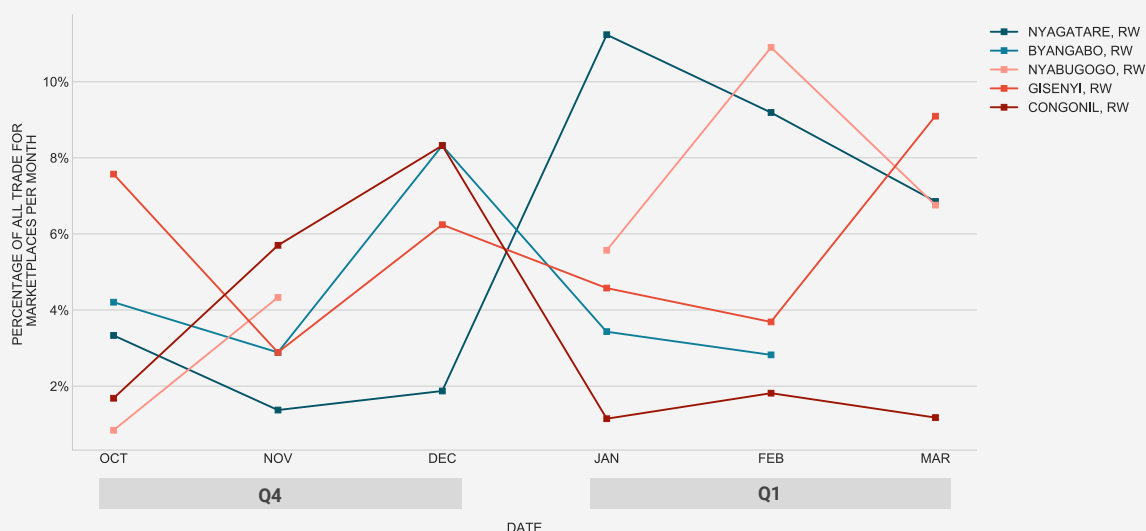
MARKET ACTIVITIES OF KENYAN TRADERS IN Q4 2021/Q1 2022



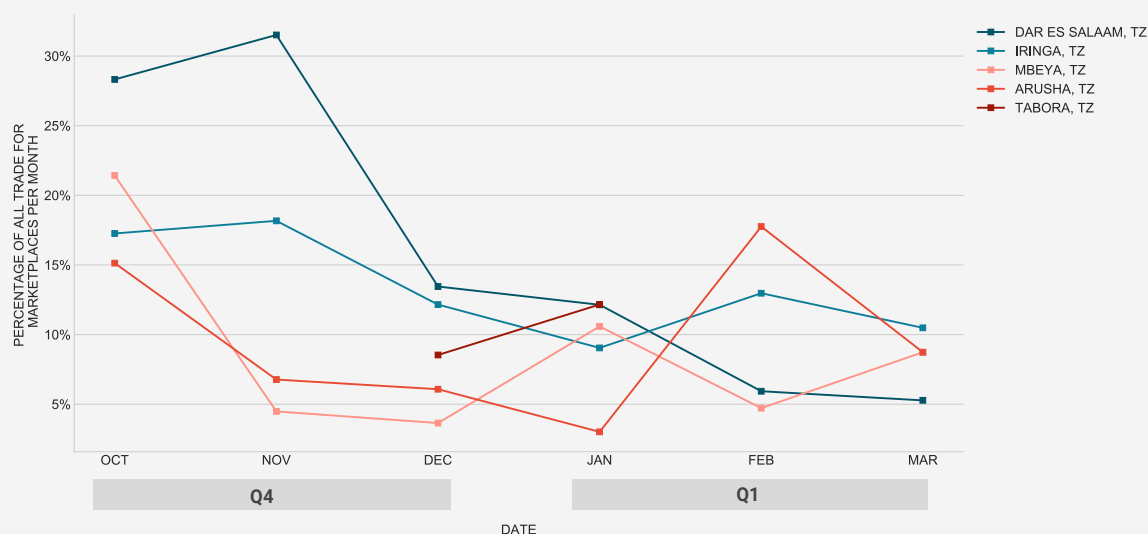
Bungoma had the highest Kenyan trader activity, comprising an average of 3.1% of all trade activity over the course of both Q4 2021 and Q1 2022. Despite this, after a peak in October (7.7%) Bungoma saw drops (-3.8pp) to 3.9% in November, 2.1% in December (-1.8pp).

The highest Rwandan trader activity in Q4 2021 and Q1 2022 was in Gisenyi at an average of 5.6%. This was followed by Nyagatare, with an average of 5.6% of Rwandan trade activity.

MARKET ACTIVITIES OF RWANDAN TRADERS IN Q4 2021/Q1 2022



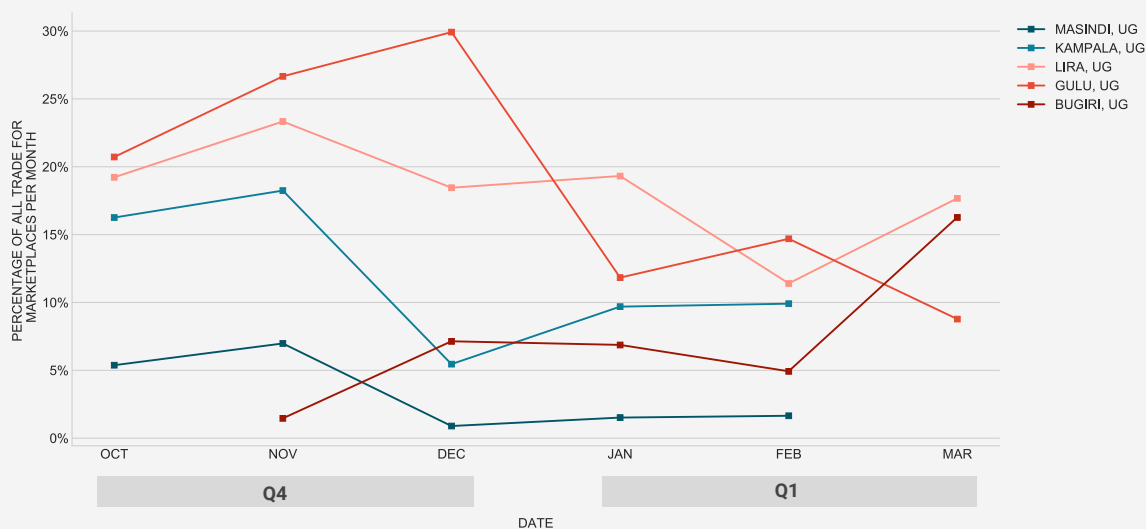
MARKET ACTIVITIES OF TANZANIAN TRADERS IN Q4 2021/Q1 2022



Dar es Salaam had the highest Tanzanian trader activity in Q4 of 2021 and Q1 of 2022 (avg. 16.1%). This was followed by Iringa, with an average of 13.3% of Tanzanian trade activity. Between Q4 2021 and Q1 2022, Tanzanian trade activity in Mbeya (-5.5pp) experienced a decrease while trade activity in Arusha (+1.5pp) experienced an increase.

The highest Ugandan trader activity in Q4 2021 and Q1 2022 (18.8% avg.) was seen in Gulu. Following Gulu, the next most popular market for Ugandan traders in Q4 2021 and Q1 2022 was Lira (avg. 18.2%). Bugiri (+5.1pp) experienced a significant increase in trade activity from Q4 2021 to Q1 2022.

MARKET ACTIVITIES OF UGANDAN TRADERS IN Q4 2021/Q1 2022

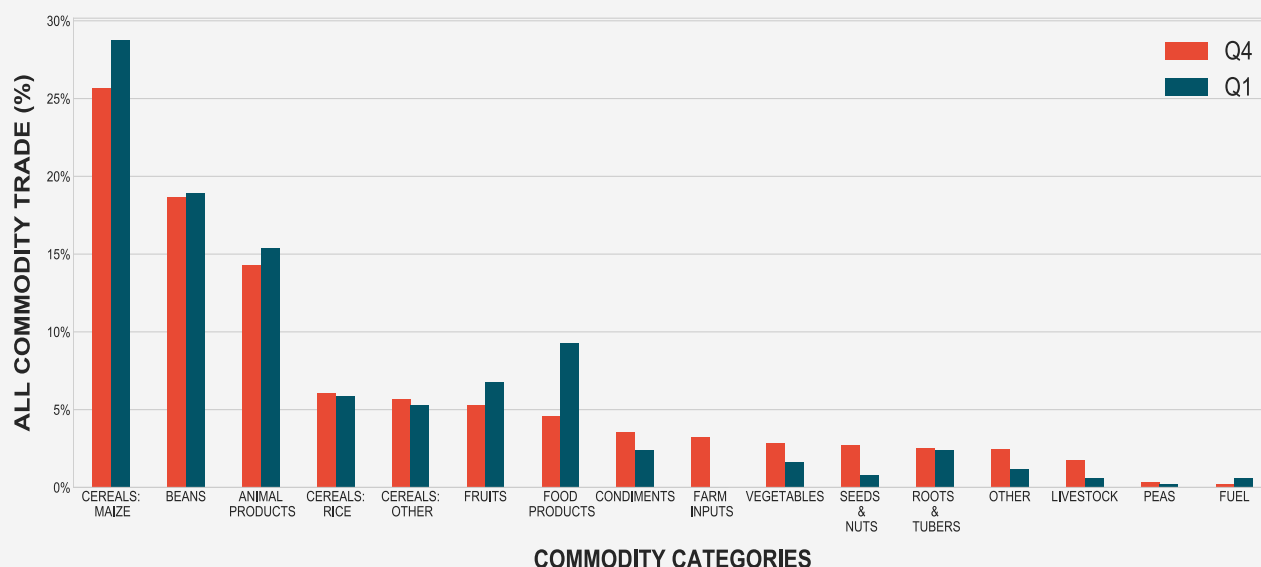


IMPACT OF COVID-19 PANDEMIC

TRADED COMMODITIES



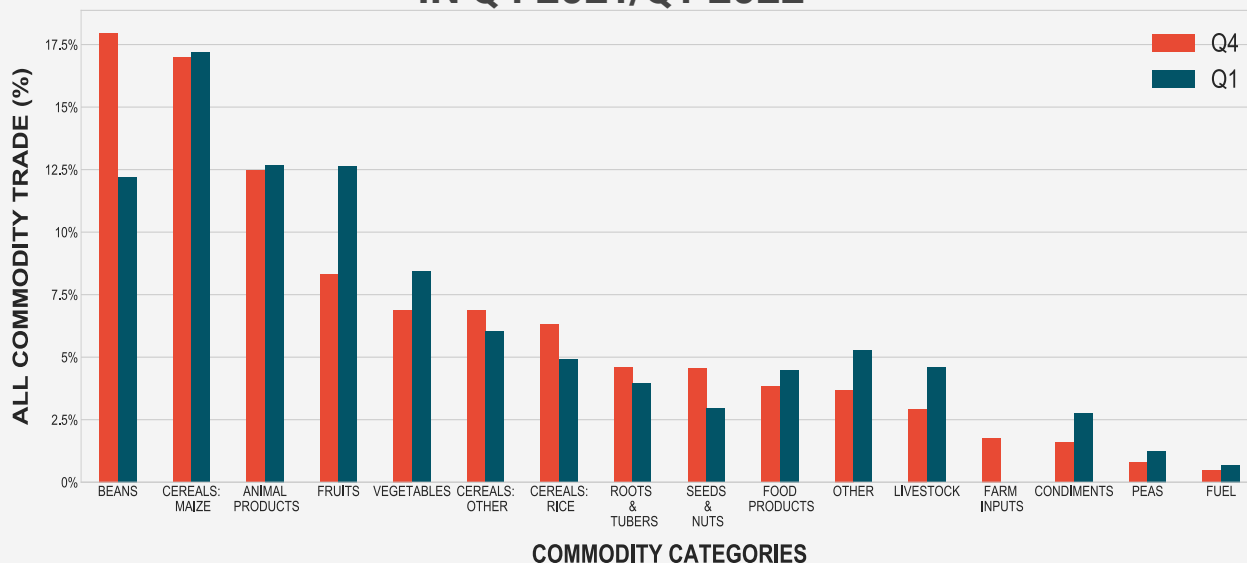
COMMODITY CATEGORIES TRADED BY WOMEN TRADERS IN Q4 2021/Q1 2022



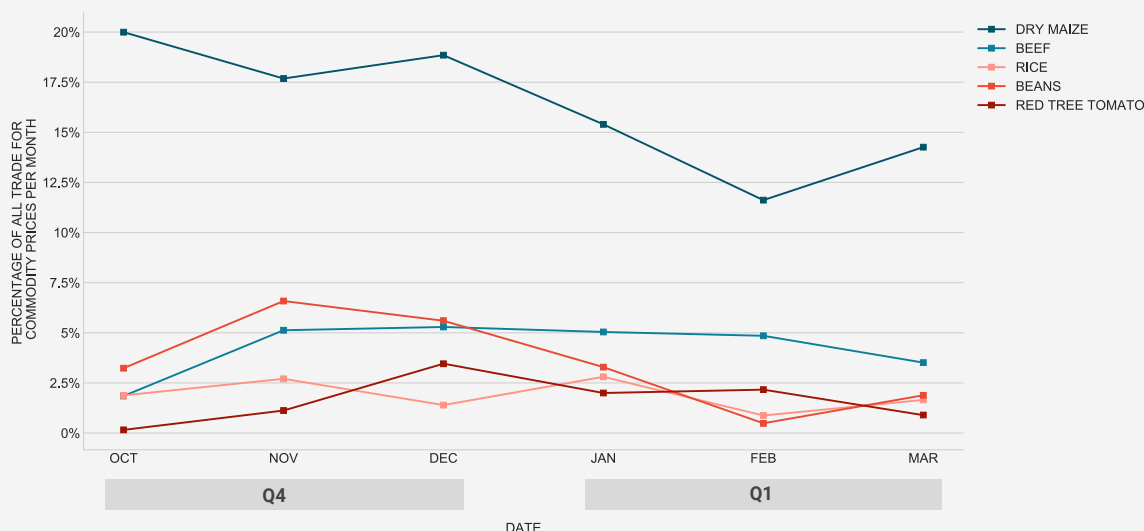
For women traders in East Africa, the most popular commodity categories were maize cereals (28.7%), beans (18.9%), and animal products (15.4%) in Q1. Between Q4 and Q1, price requests for maize cereals (+3.0pp), animal products (-1.1pp), and beans (+0.2pp) increased.

The top three traded commodities for male traders were maize cereals (17.2%), fruits (12.7%) and animal products (12.2%) in Q1. Between Q4 and Q1, fruits (+4.4pp) and maize cereals (+0.2pp) saw an increase, while trade in beans decreased by 5.8pp.

COMMODITY CATEGORIES TRADED BY MALE TRADERS IN Q4 2021/Q1 2022



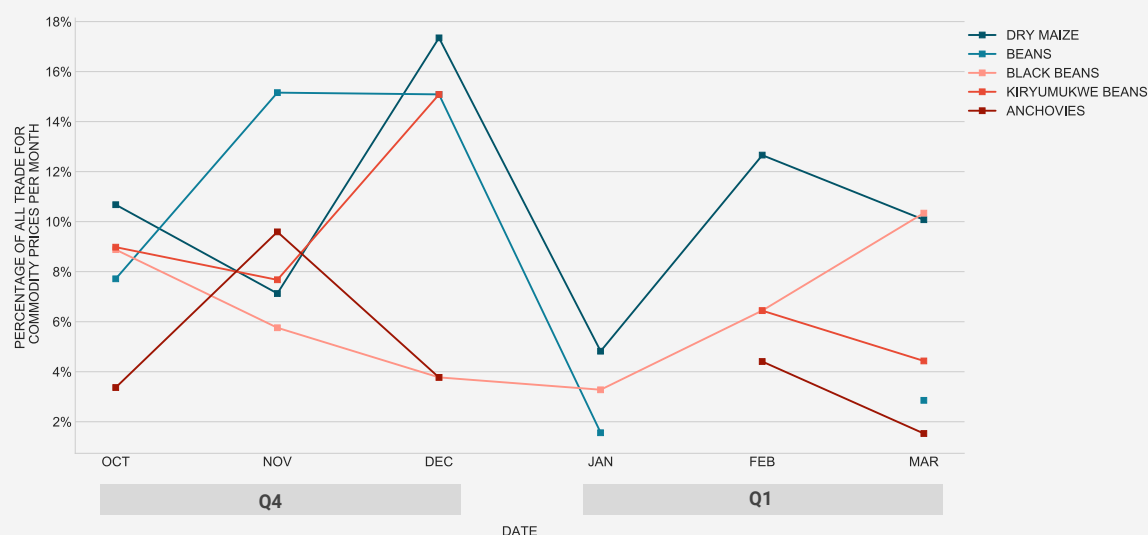
CHANGE OF COMMODITIES TRADED IN KENYA IN Q4 2021/Q1 2022



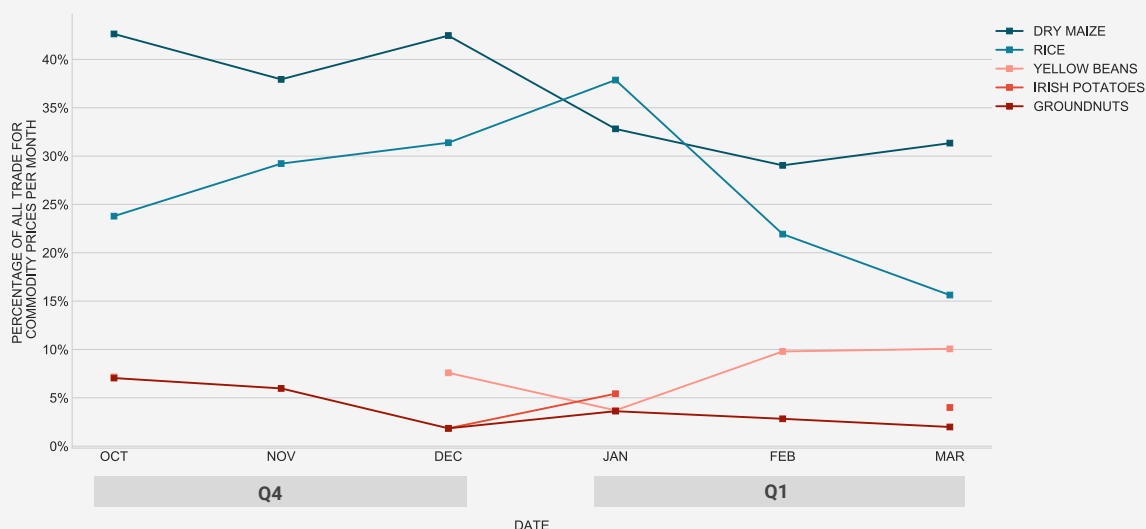
The most popular commodity for Kenyan traders in Q4/Q1 was dry maize (16.3% avg.), peaking in October at 20.0%. Trade in the top category commodities in Kenya slightly declined from Q4 to Q1 with the exception of beef (+0.4pp) and red tree tomato (+0.1pp).

Dry maize (10.5% avg.) and beans (7.1% avg.) were the most popular commodities in Rwanda in Q4/Q1. The demand for beans (-10.4pp) and dry maize (-2.5pp) decreased slightly between Q4 and Q1.

CHANGE OF COMMODITIES TRADED IN RWANDA IN Q4 2021/Q1 2022



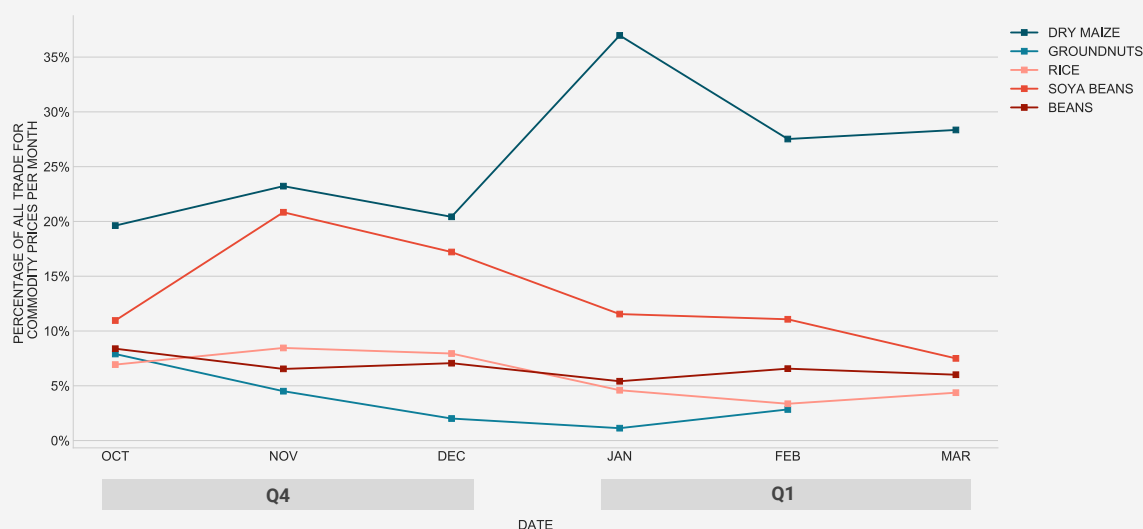
CHANGE OF COMMODITIES TRADED IN TANZANIA IN Q4 2021/Q1 2022



The most popular commodity for Tanzanian traders during Q4/Q1 was dry maize (36.0% avg.), peaking in October at 42.6%. The second most popular commodity for Tanzanian traders was rice (26.2% avg.). Groundnuts (-2.1pp) were more popular during Q4 in comparison to Q1.

The most popular commodity for Ugandan traders during Q4/Q1 was dry maize (26.0% avg.), performing higher in Q1 (+9.9pp). Soya beans was the second most popular commodity (13.2% avg.) for Ugandan traders. Soya beans peaked in November with 20.8%.

CHANGE OF COMMODITIES TRADED IN UGANDA IN Q3/Q4 2021



TECHNICAL DETAILS

DATA SAMPLES

Data is sourced from user session behaviour on Sauti East Africa's mobile-based trade and market information. Session data is enriched with demographic survey data provided by users. All data is given as a percentage of comparative sessions or users, with represented information requests weighted by user and by option set. This weighting standardises the impact of high frequency users and maximises the accurate representation of each user's behaviour.

SUMMARY OF FINDINGS

Most Popular Commodities in East Africa, by Categories Q4 2021/Q1 2022 | Sample: 3,336 users - [Explore Data](#)

Most Popular Trade Destinations for Kenyan Traders | Sample: 2,836 users - [Explore Data](#)

Most Popular Trade Destinations for Rwandan Traders | Sample: 124 users - [Explore Data](#)

Most Popular Trade Destinations for Tanzanian Traders | Sample: 168 users - [Explore Data](#)

Most Popular Trade Destinations for Ugandan Traders | Sample: 542 users - [Explore Data](#)

Market Locations Change in Trade Activity in Q4 2021/Q1 2022 | Kenyan Sample: 1,965 users, Rwandan Sample: 90 users, Tanzanian Sample: 122 users, Ugandan Sample: 371 users - [Explore Data](#)

CROSS-BORDER TRADE MOVEMENT

Trade Destinations for Kenyan Traders in Q4 2021/Q1 2022 | Sample: 2,836 users - [Explore Data](#)

Cross-Border Trading from Kenya in 2019, 2020 & 2021 | Sample: 9,820 users - [Explore Data](#)

Cross-Border Trading from Kenya in Q4 2021/Q1 2022 | Women Sample: 504 users, Male Sample: 532 users - [Explore Data](#)

Trade Destinations for Rwandan Traders in Q4 2021/Q1 2022 | Sample: 127 users - [Explore Data](#)

Cross-Border Trading from Rwanda in 2019, 2020 & 2021 | Sample: 2,110 users - [Explore Data](#)

Trade Destinations for Tanzanian Traders in Q4 2021/Q1 2022 | Sample: 168 users - [Explore Data](#)

Trade Destinations for Ugandan Traders in Q4 2021/Q1 2022 | Sample: 542 users - [Explore Data](#)

Cross-Border Trading from Uganda in Q4 2021/Q1 2022 | Women Sample: 94 users, Male Sample: 207 users - [Explore Data](#)

Market Activities of Kenyan Traders in Q4 2021/Q1 2022 | Sample: 1,965 users - [Explore Data](#)

Market Activities of Rwandan Traders in Q4 2021/Q1 2022 | Sample: 90 users - [Explore Data](#)

Market Activities of Tanzanian Traders in Q4 2021/Q1 2022 | Sample: 122 users - [Explore Data](#)

Market Activities of Ugandan Traders in Q4 2021/Q1 2022 | Sample: 371 users - [Explore Data](#)

TECHNICAL DETAILS

DATA SAMPLES

TRADED COMMODITIES

Commodity Categories Traded by Women Traders in Q4 2021/Q1 2022 | Sample: 1,343 users - [Explore Data](#)

Commodity Categories Traded by Male Traders in Q4 2021/Q1 2022 | Sample: 1,950 users - [Explore Data](#)

Change of Commodities Traded in Kenya in Q4 2021/Q1 2022 | Sample: 2,180 users - [Explore Data](#)

Change of Commodities Traded in Rwanda in Q4 2021/Q1 2022 | Sample: 97 users - [Explore Data](#)

Change of Commodities Traded in Tanzania in Q4 2021/Q1 2022 | Sample: 136 users - [Explore Data](#)

Change of Commodities Traded in Uganda in Q4 2021/Q1 2022 | Sample: 437 users - [Explore Data](#)

KENYA
Dial *716#

RWANDA
Dial *801*35#

TANZANIA
Dial *149*46*1#

UGANDA
Dial *284*111#

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ABOUT SAUTI

Sauti East Africa provides trade and market information services that empower cross-border traders in East Africa to trade legally, profitably, and safely.

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