

**Highlights**

**Outlook for maize:** Delayed start to the 2021 rainy season, along with erratic and below average precipitation could potentially delay the 2021 maize harvest in Kenya, Uganda and Tanzania. This is further exacerbated by the challenges brought about by the Covid-19 pandemic.

**Grain markets:** Supply to grain markets in the second quarter of 2021 is expected to tighten seasonally. Prices of maize and beans are projected to trend at near average levels with increase to be observed in most markets.

**East Africa Season Review:** The main cropping season in central and southern part of the region normally starts with the onset of the March to May rainy season. However, majority of the cropping regions have experienced delayed rainfall, with some countries like Ethiopia, Kenya and Somalia battling desert locust infestation, disrupting planting activities. Forecasts indicate a likelihood of above-normal rainfall for the April to June period in south and western areas of the sub-region, which would benefit main season crop development.

**Q1 Market Summary:** In Kenya, Tanzania, Uganda and Rwanda, prices remained stable in the first three months of the year, with minimal steep price movements. In monitored markets, prices were lower compared to 2020 prices as the region continues to recover from the Covid-19 pandemic.

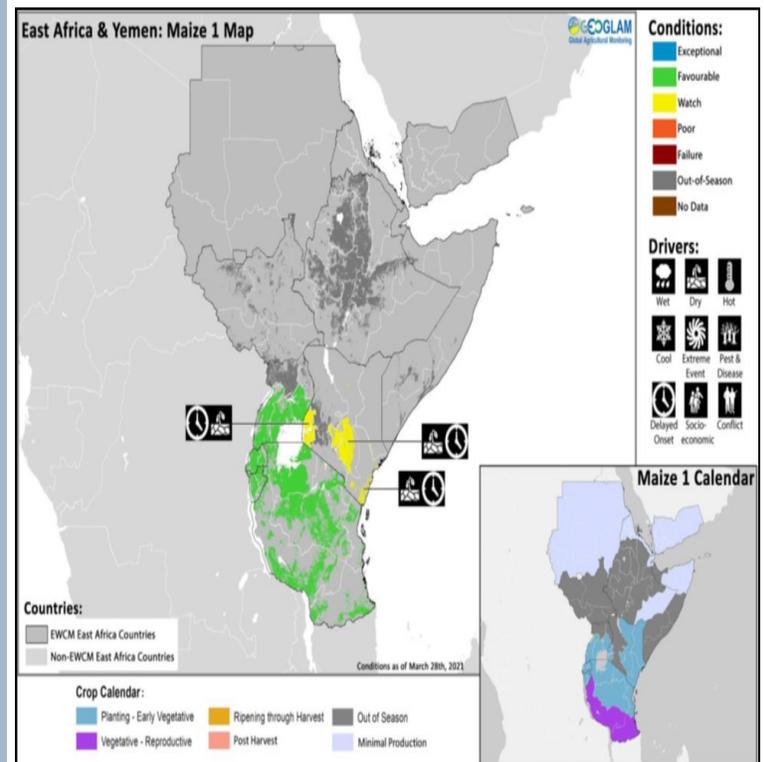
In Kenya, prices of maize marginally increased in Q1 due to dwindling stocks further enhanced by local lockdowns due to the Covid-19 pandemic and locust infestation and restrictions of maize imports from Uganda and Tanzania due to issues of quality.

In Uganda, maize price drastically decreased in Q1 due to the Covid-19 pandemic, which led closure of many grain-demanding institutions. The Kenya-Uganda border closure also reduced market access and thus further reduced prices. Beans prices increased in Q1 mainly owing to tightened stocks due to poor harvest from second season of 2020.

In Rwanda, maize prices decreased in Q1 due to lack of access to markets mainly due to the covid-19 pandemic, which has made it hard for traders and other off takers to acquire loan facilities from financial institutions. High local and regional demand pushed beans prices slightly up in Q1 awaiting the next harvest from May.

**1.0 Season Review**

In Kenya, the secondary Short Rains harvest was concluded in mid-March in south eastern and coastal marginal agriculture areas, and maize production is estimated at 25 and 45 percent below-average, respectively, due to poor rains. Planting of main Long Rains (March to May) maize crops is underway for harvest from July, and there is concern as delayed rainfall onset and dry conditions have delayed the start of the season. Forecasts indicate below-average rains are likely through June in eastern areas, which may negatively affect crop production. This is of particular concern given the poor performance and below-average production realized in the Short Rains cropping season. However, in the main producing and unimodal areas of the west and Rift Valley, land preparation of Long Rains (mid-February to mid-August) maize crops is underway for planting in April, and the forecasted above-average rains from April to June will likely benefit crop production.



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*Crop condition map synthesizing crop conditions as of March 28th. Crop conditions over the main growing areas are based on a combination of inputs including remotely sensed data, ground observations, field reports, national, and regional experts. Conditions that are other than favourable are labelled on the map with their driver.*

Source: Crop Monitor Early warning

In Uganda, planting of first season maize and millet crops is underway in the south for harvest from June, and overall conditions are favorable. Planting of first season cereals in the north and northeast will begin in April. The increased probability for the transition to neutral El Niño Southern Oscillation and Indian Ocean Dipole for the April to June period is expected to bring rains in most parts of the country and benefit first season cereal production.

In Rwanda and Burundi, conditions are favorable for the planting of main Season B maize and rice crops for harvest from June. However, some localized flooding could affect crop development in affected areas. In the main producing central and southern unimodal areas of the United Republic of Tanzania, main Msimu season (November to April rains) cereal crops are developing under favorable conditions for harvest from April. In northern bimodal areas, planting of main Masika season (March to May rains) cereals is underway for harvest from May, and overall conditions are favorable. Planting of second season sorghum crops is also underway with favorable conditions for harvest from mid-June.

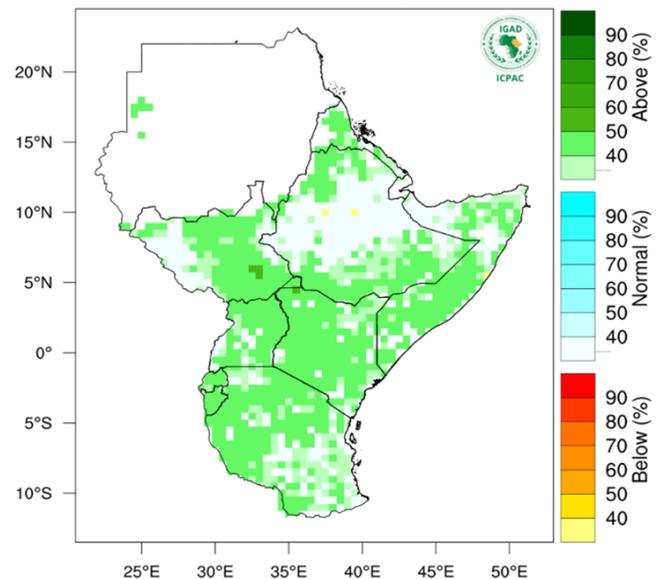
### Seasonal Outlook

Across the south of the sub region, planting and development of main Long Rains season cereals is underway in parts of Kenya, Uganda, Burundi, Rwanda, and the United Republic of Tanzania. There is some concern due to delayed rainfall onset and dry conditions which are impacting planting activities. In March, below-average rainfall was received over much of the region, and moderate to large rainfall deficits occurred in Uganda, southern Kenya, and northern United Republic of Tanzania. Forecasts indicate a likelihood of above-normal rainfall for the April to June period in south and western areas of the sub region, which would benefit main season crop development. In Kenya, the secondary Short Rains harvest was concluded in mid-March in south-eastern and coastal marginal agriculture areas, and cereal production is

estimated at well below average levels due to poor rains. Across northern bimodal areas of the United Republic of Tanzania, planting of second season Short Rains maize and sorghum crops continued in March under favorable conditions for harvest from June.

Wetter than usual conditions are expected over Kenya, Uganda, Rwanda, Burundi, Tanzania, much of Somalia, southern and northern parts of Ethiopia, and much of eastern South Sudan. Usual rainfall conditions are likely over western areas of South Sudan, central Ethiopia, Djibouti, north-western areas of Somalia, and south-eastern Tanzania. Drier than usual conditions are likely over localized areas in central Ethiopia.

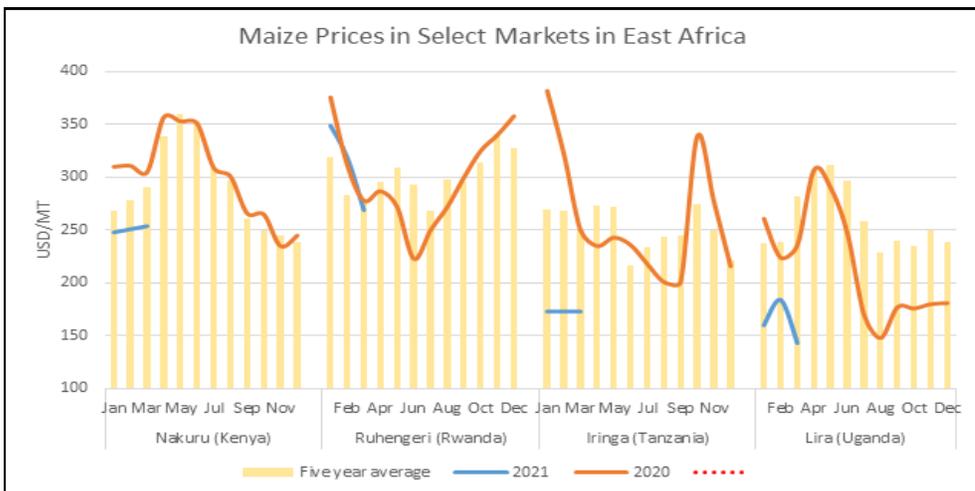
Rainfall Probabilistic Forecast for April 2021



Information source: IGAD Climate Prediction and Application Centre

## 2.0 Maize Markets and Trade

In the first quarter, maize prices were lowest in the Ugandan markets owing to ample stocks due to lack of market caused by closure of many grain-consuming institutions i.e. high schools and universities mainly due to the Covid-19 pandemic. Prices remained stable in the other monitored markets, notably below last year's levels mainly due to adaptation to the pandemic by major producers across the region.

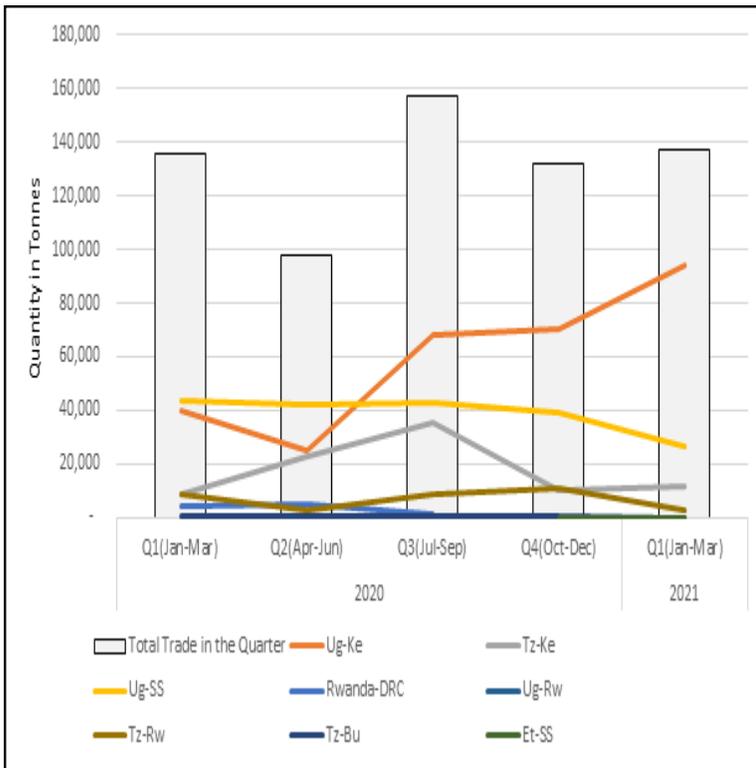


## 2.1 Trade in the region

In the first quarter, 136,797 metric tonnes was traded through monitored trade points. This was 4% increase compared to the previous quarter. The increase was mainly attributable to the increase in seasonal imports into Kenya due to declining domestic stocks from last year and low opening stocks significantly increased the domestic deficit gap; in the western Kenya production markets, prices were higher than traditional source markets in Uganda, therefore import parity was lower. Total imports into Kenya from the region increased by 31% compared to the last quarter with 106,286 metric tonnes reported as imports.

In Tanzania, maize exports declined seasonably by 31% compared to the previous quarter and 17% compared to the same quarter last year. (About 15,147 metric tonnes traded in Q1). In the quarter, Tanzania accounted for 11% of the total maize trade in the region. Demand from Kenya marginally increased to meet the domestic deficit gap whereas in Rwanda, the Season A harvest, which was recently concluded, significantly improved domestic availabilities hence a decline in trade with Tanzania by 72% compared to the previous quarter.

### Quarterly Sum of Formal and Informal Cross border Trade of Maize Grain in Main Trade Corridors in Eastern Africa. Sources: FEWS NET and RATIN



In Uganda, maize exports increased by 10% compared to the previous quarter to 120,582 metric tonnes, a 44% higher than previous year's levels. The increase in trade was not only occasioned by above average crop output in the second season, but also declined availabilities in structurally deficit countries. Local demand in Uganda also decline due to closure of most grain demanding

establishments due to the covid-19 pandemic, forcing producers to seek other markets for their produce at lower prices, which attracted traders, especially from Kenya. Despite the untimely ban in maize imports from Uganda and Tanzania by Kenya through the Agriculture Food Authority due to concerns over aflatoxin contamination in maize, trade between the two countries was not severely affected as trade continued via informal channels.

In Rwanda and Burundi, maize imports significantly declined due to improved domestic supply from the recently concluded season A harvest in March.

### Kenya

Production in 2021 is estimated to recover by 5% compared to last year to 4 million tonnes. Therefore, supply is projected to increase to about 4.6 million tonnes compared to 4.4 million in 2020. In the markets, limited supply was reported early in the year owing to tightening stocks from the previous season. This was further exacerbated by hoarding of stocks by farmers in the source markets (Central and North Rift areas). Traders and farmers were looking for better margins as prevailing prices in Q1 could not permit breaking even. Earlier in the year, the National Cereals and Produce Board bought maize from farmers at around Kes 2,500/90 kg. On the other hand, traders were bidding lower prices than the NCPB price with farmers not keen to release the commodity at a price lower than Kes 2800/90kg. NCPB later reviewed prices to Kes 2700/90kg bag to try to woo growers who were selling their maize to traders and millers offering slightly higher than what it was paying.

A look at the producer markets in Kenya, prices were up marginally by 1 percent % compared to the previous quarter in Nakuru, trading at USD 251/MT whereas in Eldoret, prices averaged USD 228/MT, a 1 % percent increase compared to the previous quarter. Prices in Q2 are projected to trend above Q1 levels due to low stocks as the short rains output was below average. Therefore, local supply deficit is expected to widen in the coming quarter and bulk of the imports are expected from Tanzania and Uganda towards the end of the second quarter.

### Uganda

The 2021 production is forecasted to increase by 8 percent to about 2.8 million tonnes. Domestic consumption is projected to increase marginally by about 1 percent to 2.65 million tonnes. Exports are expected to marginally decrease owing to better outputs to be realized in structurally deficit countries that rely on Uganda to bridge demand gaps.

Prices have drastically reduced are a result of the covid-19 pandemic leading to a number of maize grain demanding institutions closing. The situation was compounded by Kenya halting maize imports from Uganda due to concerns around aflatoxin contamination in maize making it unfit for human consumption. Traders were forced to trade informally which drove them to quote lower prices. Prices went down from Ugx.730/kg in February to an average of Ugx.500/

kg in March 2021 across all the monitored markets .

Traders are also battling with the recent issued policy from the government of Uganda, which prohibited small-scale millers from participation in the maize milling business. The government directed the small-scale millers to only conduct the milling business when they have been issued a certificate to do so . *"We are out of business or other with we are forced to do other grain/pulse business yet some of us have no expertise or capital for other commodities because they require a lot of funds"* said by 'Lucas , a trader from Busia boarder market.

Maize prices are expected to further decrease as more maize is released into the markets by farmers to get income for immediate financial needs e.g. school fees.

### Tanzania

In Tanzania, production in 2021 is estimated to increase by 8% compared to the 2019/2020 season with about 6.3 million tonnes. With higher opening stocks, market supply will remain ample through the end of the year. Supply is estimated at about 6.3 million tons against the annual demand of about 5.9 million tonnes.

In the first quarter, supply was stable in the monitored markets. In Dar-es-Salaam, prices increased marginally by 10 percent quarter-on-quarter and were 15 percent lower compared the five-year average. The msimu season establishment was good over much of the southern region however, below normal rainfall was recorded in the northern part and the lake region but prospects look favorable. In Q1, prices increased seasonally in the production markets due to demand from the urban markets. In Arusha, a 19 percent quarter-on-quarter gain in prices was recorded with the commodity trading at about USD 235/MT. With good prospects expected over much of the southern production region and some bimodal areas, the May to June harvest is expected to shore up supplies resulting to prices decreasing.

### Average Quarterly wholesale prices of Maize Grain in urban markets in Eastern Africa (USD/MT). Source: RATIN

Market	2021 Jan—Mar Average	Five Year Average	Previous Quarter	Same Quarter Last year
Nairobi (Kenya)	327	341	310	347
Kampala (Uganda)	178	259	197	271
Dar es Salaam (Tanzania)	295	349	307	337
Ruhengeri (Rwanda)	312	293	358	322

In Rwanda, production is projected to increase marginally to 420,000 tonnes with supply maintaining the same level at 591,000 metric tonnes is estimated in 2020/21 marketing year against a demand of 540,000 tons. In Rwanda, prices decreased in the first quarter as domestic supply from the 2021 first season significantly improved availability in the markets. In Mulindi, stable supply was reported in Q1 with marginal gains observed, the commodity was trading on average at USD 309/MT, the lowest amongst the urban monitored markets. In the production markets, demand pressure eased significantly due to better household availability. In Kamembe, a 31 percent decline quarter-on-quarter was recorded in Q1 with prices forecasted to remain relatively stable in the second quarter.

### Outlook Summary

1. A late start to the 2020/21 rainy season, along with erratic and below average precipitation could potentially delay the 2021 harvest in Kenya, Uganda and Tanzania. Expectations are generally depressed for the 2020 harvest in East Africa.
2. Maize grain prices in the Eastern Africa region are projected to trend at near average levels through September 2021. However, in Tanzania, maize grain prices are projected to trend significantly below average levels owing to ample market availability.

### 3.0 Beans Markets and Trade

Within the region, beans prices were lowest in Rwanda as recently gathered stocks from the first season significantly improved market availability of the commodity. Beans prices decreased in Rwanda, Tanzania and Kenya but increased seasonably in Uganda and Burundi, the latter trend attributable to tightening domestic stocks due to poor seasonal harvests in 2020.

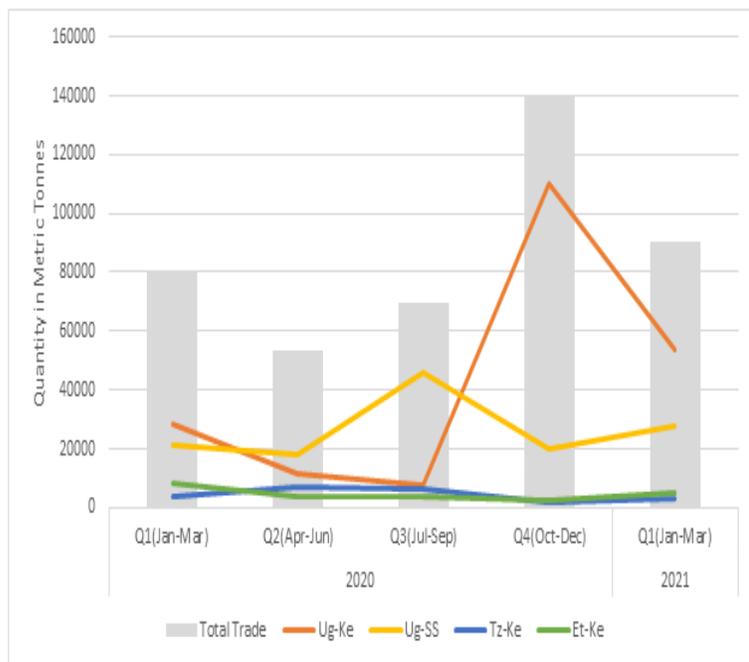
#### 3.1 Trade in the region

In the first quarter, 90,340 metric tonnes of dry beans was traded through the monitored trade corridors, this was a 35% decrease compared to the previous quarter and a 12% increase compared to a similar period last year . In the second quarter, trade in the Great Lakes is expected to decrease as there are concerns about availability of the commodity owing to the poor crop performance in Uganda, Kenya and some parts of Tanzania due to late onset of rainfall.

Uganda's exports to Kenya significantly dropped by 56,021 metric tonnes, a 50% drop compared to the previous season. This was mainly due to the excess rainfall, which interfered with the crop development process that affected the second harvest of 2020. Kenya imports with Tanzanian and Ethiopia marginally increased to try and bridge the demand supply gap due to the poor crop performance of the previous season.

*Production, demand and supply estimates of maize and rice compiled from United States Department of Agriculture (USDA) data.*

**Quarterly Sum of Formal and Informal Cross border Trade of Dry beans Grain in Main Trade Corridors in Eastern Africa. Sources: FEWS NET and RATIN**



**Kenya**

In Kenya, the 2020 short-rains harvest was below average resulting to increased demand pressure. This was compounded by reduced imports from Uganda due to below average crop performance in the previous season. In the production markets, low supply was noted in Meru, Makueni and Machakos following low output earlier in the year mainly due to lack of rainfall and diseases, which greatly affected the yield. In Nairobi, prices remained stable, with beans trading at USD 663/MT in Q1 with much of the supply coming from Uganda, Tanzania and Ethiopia. In Kenya, prices are projected to gain in the second quarter following below average rainfall and the effects of the Covid-19 pandemic, which have curtailed production efforts by farmers.

**Uganda**

In Uganda, low domestic supply was reported in the quarter. Consequently, prices increased remarkably in the first quarter. The second season crop in 2020 was affected by poor rains leading to supplies tightening earlier than usual. Among the monitored production markets in East Africa, Masindi exhibited price gains, with prices settling at USD 677/MT in Q1. In Kampala prices were up by 8 percent quarter-on-quarter, trading at USD 674/MT, with gains also observed in the eastern markets. The first season demand pressure is expected to build on account of low stocks as prospects for the first season crop are not good. Extended dry conditions and late rains may affect this year's production.

**Tanzania**

In Tanzania stocks were reported to be ample with harvest from the bimodal areas late in the quarter improving domestic stocks in the

north and north-eastern markets. In Dar es Salaam prices eased by 5 percent quarter-on-quarter and generally, prices were below the five-year average in all the monitored markets. In the second quarter, prices are expected to ease following the positive production outlook for the main crop.

**Rwanda**

In Rwanda, prices slightly decreased due to improved domestic availabilities following the first season harvest. In the northern region, prices reduced by 2 percent quarter-on-quarter averaging USD 719/MT. In Kigali, prices leveled at USD 697/MT in Q1, a 1 percent decline from the previous quarter. Prices remained higher than the five-year average due to increased demand pressure, both domestic and regional. Supply is expected to tighten in the second quarter as stocks diminish seasonally but will recover in May, as the second season harvest will improve availability. The second season prospects looks favorable.

**Average Quarterly wholesale prices of Dry Beans in urban markets in Eastern Africa (USD/MT). Source: RATIN**

Market	2021 Jan—Mar Average	Five Year Average	Previous Quarter	Same Quarter Last year
Nairobi (Kenya)	663	646	666	744
Kampala (Uganda)	675	665	624	817
Dar es Salaam (Tanzania)	920	750	896	899
Ruhengeri (Rwanda)	718	603	815	737

**Outlook Summary**

With erratic below average rainfall experienced at the beginning of the season in the region, significant production losses is expected with prices gaining towards the end of the third quarter in Uganda and Kenya. In Rwanda, prices are expected to remain stable with domestic supply from harvest in the second quarter reducing demand pressure.



#### 4.0 Rice Markets and Trade

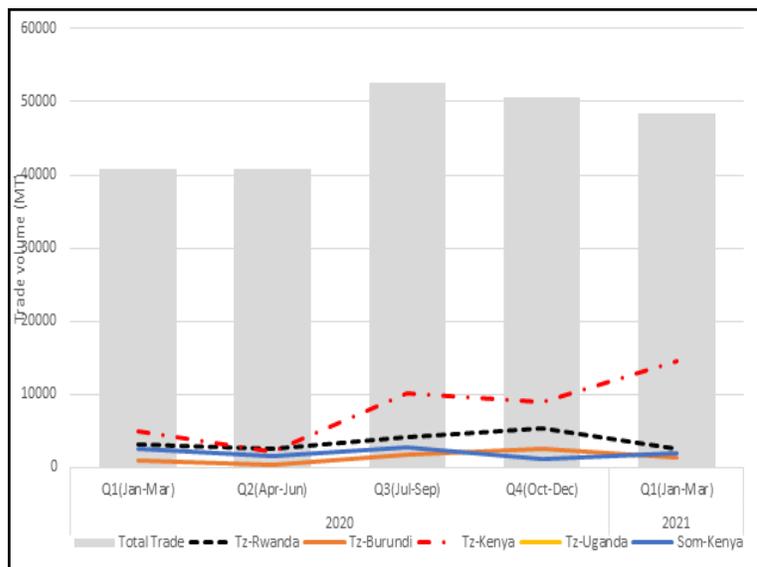
In the region, prices were lowest in the producer markets of Tanzania and Uganda and highest in the urban markets of Kenya. The region is typically a deficit producer with requirements met by imports from the international markets.

##### Tanzania

In Tanzania, production was forecasted to marginally increase to about 2.31 million tonnes (1.5 million metric tonnes milled basis) with total demand remaining stable at about 0.9 million metric tonnes. In 2020, production benefitted from timely, well distributed, and above average rains, which led to increased output over much of the production regions in central and northern Tanzania. Therefore, production recovered with about 39,000 metric tonnes. A surplus is expected in this marketing year.

Price movements were seasonal with drops observed since the beginning of the year. Compared to last year, prices were lower with price decreases recorded in most markets. In the southern highlands, Iringa market had a marginal drop of 13% quarter-on-quarter. In the aforementioned market prices averaged at USD 652/MT Q1. In Dar es Salaam, prices were stable compared to Q4, 2020 and averaged USD 830/MT; this was 3% lower compared to the previous quarter as supply from Mbeya and Morogoro mitigated demand pressure. In the northern market of Arusha, prices remained stable as commodity traded at about USD 719/MT.

#### Quarterly Sum of Formal and Informal Cross border Trade of Rice Grain in Main Trade Corridors in Eastern Africa. Sources: FEWS NET and RATIN



##### Tanzania Exports to the region

In Q1 of 2021, total trade in the quarter marginally decreased to 48,340 metric tonnes compared to the last previous quarter with Tanzania accounting for 38% of the total trade. Tanzania's exports to Kenya increased by 63% compared to the previous quarter at 14,642 metric tonnes owing to increase demand pressure due to poor crop

performance in Kenya. On the other hand, exports to Rwanda and Burundi decreased by 53% and 44% respectively compared to the previous quarter due to improved domestic availabilities from the recently gathered season A crop.

##### Kenya

In Kenya, milled rice production is estimated at 80,000 metric tonnes in 2020/21 marketing year, similar to last year's levels. However, consumption is set to increase marginally by approximately 2% compared to last year to 715,000 metric tonnes. Therefore, there is a huge gap in supply, which is plugged by imports from international markets by traders. Within the region, Tanzania is the major source of rice imports to Kenya.

In East Africa, Nairobi market prices were above the region's urban markets average trading at USD 1,260/MT. In other urban markets, marginal price increases were observed in Nakuru and Mombasa where rice trade at USD 1498/MT and USD 1009/MT respectively.

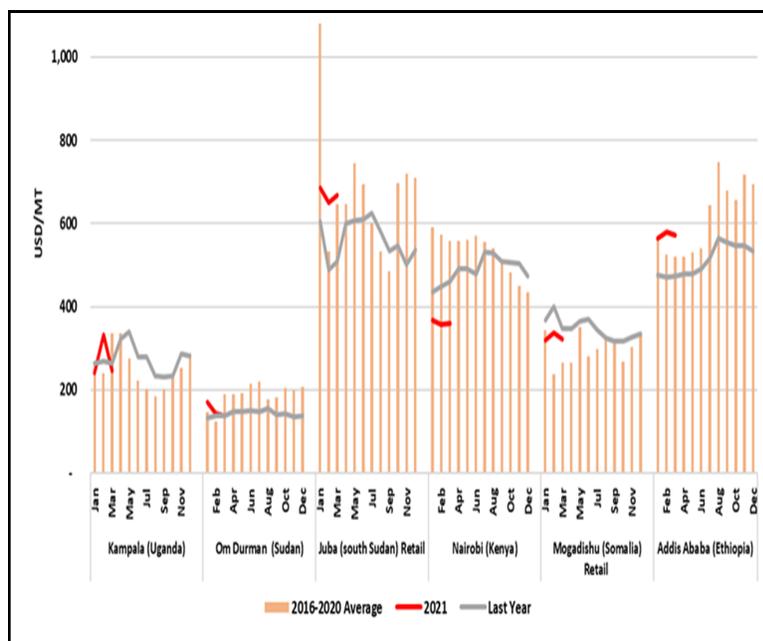
##### Uganda

Rice production in 2020/21 was estimated at 166,00 MT against consumption 246,000 MT. Like other East African countries, imports from international markets and Tanzania ease the demand pressure in the first quarter. Increased domestic stocks from the second season in December improved market supply, marginally reducing market prices. In Kampala, rice was trading at USD 633/MT while in the western region, prices were relatively stable in Kabale where rice was trading at USD 619/MT with gathered harvest improving market supply.

#### 5.0 Sorghum Markets

Prices of sorghum in Uganda and Kenya drastically dropped due to the uncertainty in the brewing industry because of the Covid-19 restrictions on entertainment.

#### Sorghum Prices in Select Markets in East Africa. Source FEWSNET



## 6.0 Regional Agricultural Trade Policy Developments

### Kenya

#### 1.0 Implementation of Minimum Tax

In Kenya, the Finance Act 2020 amendments to the income tax Act were effected and the Minimum tax was introduced, effective from January 1st 2021. The tax is to be levied at the rate of 1% on the gross turnover where the minimum tax is higher than the installment tax due under the normal regime. The minimum tax targets all business enterprises regardless of the annual gross turnover, with exemption only to businesses whose income is subject to Turnover Tax, those whose retail price is government controlled and insurance businesses. All other businesses will have to pay the minimum tax, payable on the 20th of the 4th, 6th, 9th and 12th month in a year.

Notably, the introduction of minimum tax did not replace the existing Turnover Tax (ToT), which was introduced in 2020. Currently, the Turnover tax is payable at one per cent of monthly gross turnover and remitted to the Kenya Revenue Authority on the 20th day of the month following the taxation period. This applies to all business enterprises with an annual turnover of more than Kshs 1,000,000 but less than Kshs 50,000,000 in any given year.

The Eastern Africa Grain Council held a consultative meeting with grain stakeholders and Kenya Revenue Authority to discuss the implications of the minimum tax and recommendations from the grain sector. The meeting communiqué can be accessed [here](#).

The High Court of Kenya however, on Monday 19th April, suspended the implementation of the minimum tax on businesses following a petition challenging the enforcement.

#### 2.0 Ban of Maize imports from Uganda and Tanzania

The Government of Kenya through the Agriculture and Food Authority (AFA) on 5th March 2021 banned the importation of maize from Uganda and Tanzania with immediate effect. According to AFA, the ban was introduced based on the findings of a survey conducted by AFA, which showed that maize from the two countries is unfit for human consumption due to levels of mycotoxins that were consistently beyond safety limits. The sudden ban led to a snarl up of traffic at the Busia and Namanga borders as trucks carrying maize to Kenya were blocked from crossing the borders, with those that had crossed into Kenya, were restricted from travelling further.

The ban caused a crisis disrupting trade and increasing the cost of doing business already taking a huge toll on traders, transporters and farmers with most traders having entered into bidding agreements to deliver maize supplies. At the Busia border, traders were left stranded with more than 100 trucks loaded with maize grain, and in extreme cases, trucks were sent back to Kenya. The ban posed severe implications for cross-border maize trade, food security, business operations and livelihoods for maize value chain players in

all three countries.

Following the Regional Members and Stakeholders Consultative Meeting, EAGC held a series of engagements with the Agriculture Food Authority (AFA), senior officials from the Ministry of Agriculture in Kenya and the Kenya Bureau of Standards (KeBS) between 10th and 12th March 2021.

EAGC deliberations with AFA, the Ministry of Agriculture and KEBS resulted in The Cabinet Secretary in charge of the Ministry of Agriculture in Kenya after agreeing on strict regulations that will be implemented in consultation with stakeholders.

#### 3.0 National Smart Food Market Policy

EAGC in partnership with the State Department of Housing, Infrastructure and Urban Development is developing a National Smart Food Market Policy for Kenya. Through a consultative Policy Making process, the smart markets concept will be subjected to review upon which a framework and roadmap for the establishment of the smart markets will be developed.

The functioning of open air markets is flawed with high incidences of food wastage, increased public health risks and inadequate food safety which are challenges caused by impediments such as informal operations, low quality infrastructural designs, poor governance, poor waster management , poor food quality and hygiene, post-harvest food losses and weak disaster preparedness and management.

The National Smart Market Policy will help alleviate some of the challenges impeding the full benefits and potential of the Food Markets in Kenya focusing on all the pillars of the markets including structural designs, the policy environment, business modeling and sustainability of the market.

The Smart Markets policy will ensure coherence with existing market reforms by augmenting service delivery rather than negotiating over reform with a view of maintaining some sort of centralized control which has been the norm.

## About the Eastern Africa Grain Council

The Eastern Africa Grain Council (EAGC) is a membership-based organization representing the grain sector in Eastern and Southern Africa. The Council exists to facilitate efficient, structured, profitable and inclusive grain trade in its 10 mandate countries, namely Kenya (Regional Headquarters), Uganda, Tanzania, South Sudan, Ethiopia, Burundi, Rwanda, Zambia, Malawi and the Democratic Republic of Congo. EAGC draws its membership from grain sector value chain actors in its Member States, which include farmers, traders and processors. Support service providers and complimentary sectors such as agro-input suppliers, financial services and animal feed manufacturers also form part of the Membership. In facilitating structured grain trade in the Eastern Africa region, EAGC provides trade facilitation services through the EAGC G-Soko Grain Trading System; market and cross-border trade information through the Regional Agricultural Trade Intelligence Network (RATIN – [www.ratin.net](http://www.ratin.net)); pursuing appropriate policy reforms to support growth of structured grain trade through the Agricultural Trade Policy Advisory Forum for Eastern and Southern Africa (ATPAFESA); and capacity building of grain industry stakeholders through the Grain Business Institute (GBI).



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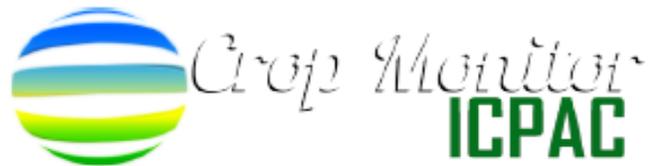
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Partnerships



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**Prepared by members of the GEOGLAM Community of Practice, Coordinated by the IGAD Climate Prediction and Application Center**



**EARTH DATA FOR INFORMED  
AGRICULTURAL DECISIONS**