



Highlights

- Above average rainfall received across the region.
- Harvest for main season cereals is underway and production prospects are looking favourable in Northern Parts of East Africa.
- Floods in several parts of the region led to production shortfalls.
- Prices trended seasonally towards the end of the year with most prices being above their five-year average.

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Summary

The 4th quarter of 2019 saw most of the region receive above average rainfall due to a positive Indian Ocean Dipole, a phenomenon which sees greater than average surface temperatures and great precipitation in the western Indian Ocean region as reported by the IGAD Climate Prediction and Applications Centre (ICPAC). This rainfall pattern was in line with the October-November-December (OND) rainfall forecast by the 53rd Great Horn of Africa Climate Outlook Forum (GHACOF). In Kenya, the Western regions received the most rainfall with floods and landslides reported in some areas around the north-western region. Similar cases were also reported in Uganda, Rwanda and Burundi. As flooding persists across East Africa and heavy rains continue, which has led to delay in harvesting, there is a growing concern of the effects of continued heavy precipitation in the region. Despite the adverse conditions, the above average rainfall could improve grain production outlook for 2020 and help mitigate price spikes.

In East Africa, staple grain prices were relatively stable in the fourth quarter but were above both last year's and the five-year average levels owing to the effects of poor performance of previous crop seasons. In Kenya, maize prices remained high as the market responded slowly to the ongoing harvest but were

on a slight downward trend. Maize prices in Tanzania were still firmly high owed to increased regional demand from the Southern African countries due to the ongoing drought ([Crop Monitor](#)).

Harvest is underway for main season cereals in the north of the Sub region (Kenya and Uganda) and production prospects are favourable, except in South Sudan. In the south of the sub region (Tanzania, Rwanda and Burundi), heavy rains in October through November benefited crop establishment and development but triggered floods, which will likely result in localized crop production shortfalls. ([Crop Monitor](#)).

Table 1: Wholesale grain prices in select markets East Africa (USD/MT). Oct-Nov. (Source - RATIN)

Commodity	Location	Sep-19	Oct-19	% change
Maize	Nairobi	355	382	7.61
	Kampala	248	286	15.32
	Dar es Sal.	385	389	1.04
	Kigali	340	329	(3.24)
	Bujumbura	472	585	23.94
Rice	Kampala	880	904	2.73
	Gicumbi	897	853	(4.91)
	Bujumbura	872	911	4.47
Red Sorghum	Nairobi	704	703	(0.14)
	Kampala	233	254	9.01
	Dar es Sal.	444	422	(4.95)
	Gicumbi	386	380	(1.55)
	Bujumbura	634	682	7.57
Mixed beans	Kampala	798	768	(3.76)
	Dar es Sal	741	743	0.27
	Gicumbi	459	462	0.65
	Bujumbura	529	580	9.64

Table 2: Wholesale grain prices in select markets East Africa (USD/MT) Oct-Nov. (Source - RATIN)

Commodity	Location	Oct-19	Nov-19	% change
Maize	Nairobi	382	394	3.14
	Kampala	286	311	8.74
	Dar es Sal.	389	421	8.23
	Ruhengeri	325	381	17.23
	Bujumbura	585	638	9.06
Rice	Kampala	904	945	4.54
	Gicumbi	853	873	2.34
	Bujumbura	911	975	7.03
Red Sorghum	Nairobi	703	698	(0.71)
	Kampala	254	294	15.75
	Dar es Sal.	422	417	(1.18)
	Gicumbi	380	408	7.37
	Bujumbura	682	760	11.44
Mixed Beans	Kampala	768	688	(10.42)
	Dar es Sal.	743	869	16.96
	Gicumbi	462	507	9.74
	Bujumbura	580	616	6.21

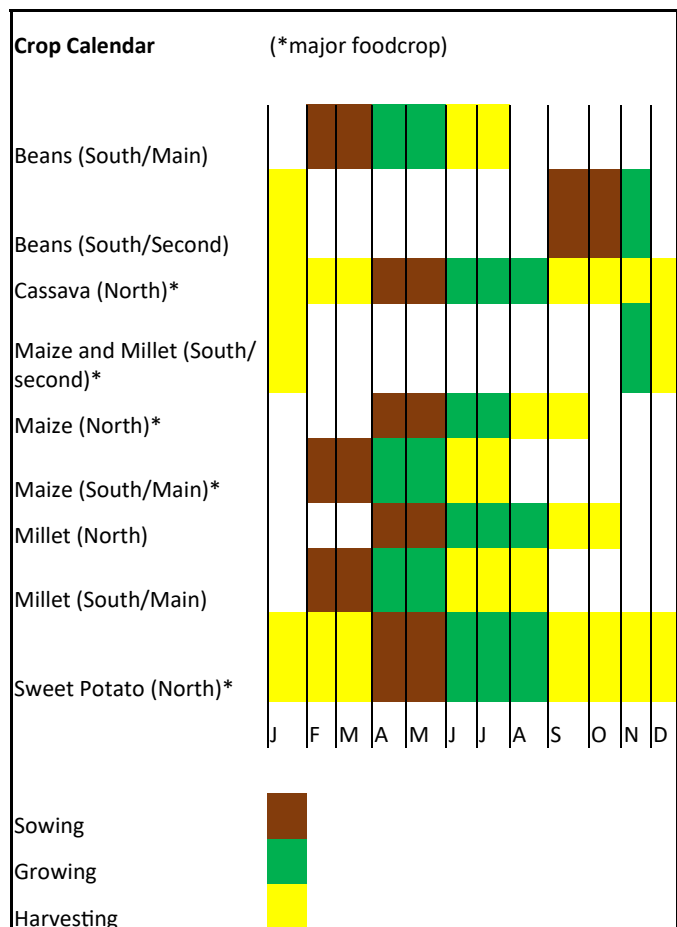
Table 3: Wholesale grain prices in select markets East Africa (USD/MT). Nov –Dec. (Source - RATIN)

Commodity	Location	Nov-19	Dec-19	% Change	Dec-18
Maize	Nairobi	394	382	3.14	241
	Kampala	311	342	8.74	176
	Dar es Sal.	421	365	8.23	283
	Ruhengeri	381	415	17.23	240
	Bujumbura	638	702	9.06	537
Rice	Kampala	945	980	4.54	997
	Gicumbi	873	930	2.34	-
	Bujumbura	975	972	7.03	967
Red Sorghum	Nairobi	698	630	(0.71)	432
	Kampala	294	302	15.75	176
	Dar es Sal.	417	415	(1.18)	274
	Gicumbi	408	439	7.37	-
	Bujumbura	760	743	11.44	480
Mixed Beans	Kampala	688	570	(10.42)	408
	Dar es Sal.	869	873	16.96	653
	Gicumbi	507	604	9.74	-
	Bujumbura	616	637	6.21	537

1.0 Crop Season

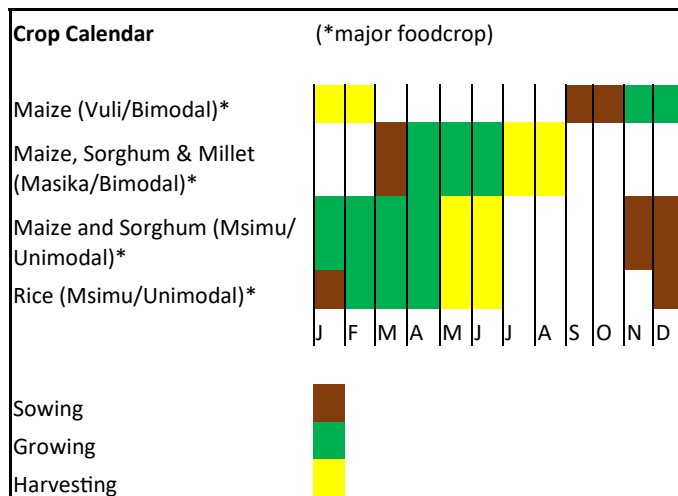
Uganda: In bimodal areas in south western Uganda, ample food stocks from the first season harvest and declining market prices have both contributed to the improvement of food access for the poor. Meanwhile, above-average rainfall since June prompted early planting for the second season. In Karamoja, food supplies from the unimodal and first season bimodal harvests are improving food availability ([FEWSNET](#)). The harvest is approaching completion in southern and central areas, which has improved food supply in this quarter. Towards the end of the quarter in most bimodal areas, atypically early and well above-average rainfall has supported above-normal crop development, though south-western areas have experienced below-average rainfall. As a result, the green harvest of early-planted maize, beans, and other pulses is currently available in the Eastern and Central regions and northern parts of the Western region.

Figure 1: Uganda Crop Calendar. Source: FAO GIEWS



Tanzania: Heavy rainfall was received especially in the coastal region (Dar es salaam, Tanga, Pwani, Unguja, Pemba and Morogoro) with incidences of flooding in some areas. Planting started around the lake regions: Mwanza, Shinyanga, Geita, Mara and Tabora. Other regions started planting in November and expected to go on until early January and harvest from May to August. The *Vuli* harvest is also expected in the northern, north-eastern and coastal bimodal rainfall areas in January, which will see slight improvement in market supply and briefly stabilize prices in the country as it only contributes to 15-20 percent of the total annual cereal production.

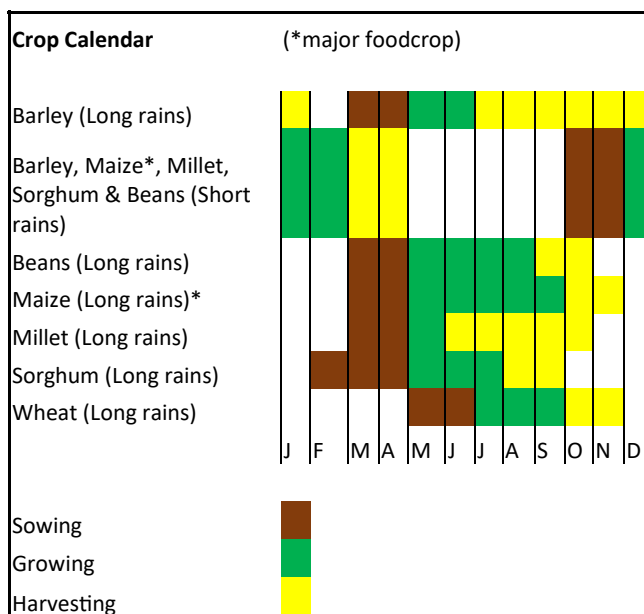
Figure 2. Tanzania Crop Calendar. Source FAO GIEWS



Kenya: October was one of the wettest months on record since 1981, according to [ICPAC](#). Cumulative rainfall since early October was above average in many areas, with positive anomalies exceeding 100 millimetres according to [ICPAC](#) leading to incidences of flooding in West Pokot. Disruptions to critical transport infrastructure and ongoing delays in the unimodal harvest have reduced the availability of food in markets, sustaining high food prices. In localized areas, crop and livestock losses were reported.

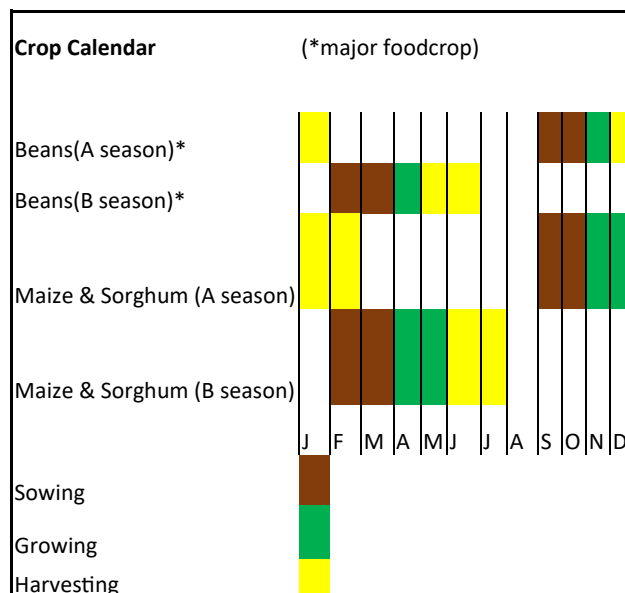
Above average rainfall has had mixed effects on agriculture. On one hand, it is likely to lead to above average crop production in the bimodal areas while on the other hand, disruptions to transport infrastructure and harvests in unimodal areas is dampening crop output onto the market.

Figure 3: Kenya Crop Calendar. Source: FAO GIEWS



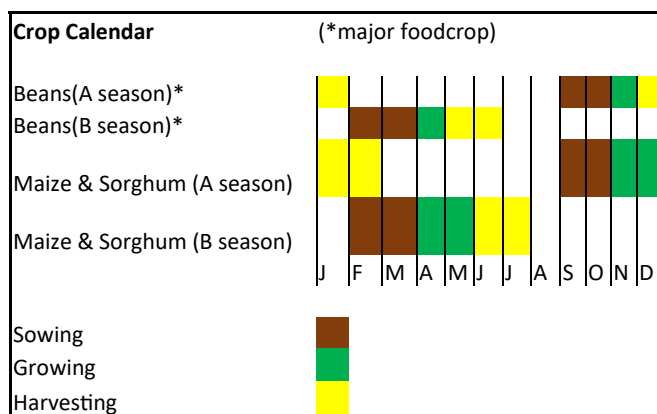
Rwanda: Rainfall was above average across the country and reduced to average towards the end of the year. Average harvests are expected from December 2019 to February 2020. Despite the generally favourable production prospects, relatively heavy rainfall increased risk of flooding in lowlands across the country and of localized landslides, particularly in the Western province, which led to destroyed crops and houses. Moreover, the rains damaged the bean and Irish potato crops, especially in North Province, but benefited all other crops. This will likely result in an overall above average harvest in January through to the end of the first quarter in 2020 ([FEWSNET](#)).

Figure 4: Rwanda Crop Calendar. Source: FAO GIEWS



Burundi: Food availability has been boosted by carry over stocks from an above-average season 2019 B harvest, above-average season 2019 C production and ongoing production of bananas, roots, and tubers. Above-average rainfall received from September to December supported another favourable harvest in December-January. Above average and well-distributed rainfall throughout the 2020 Season A to date has led to good crop development, with favourable harvests expected in January 2020. However, some localized flooding and damage to crops was experienced during the quarter in some areas in the country. Though an outbreak of Fall Armyworm was recently signalled, significant impacts on crop production are not expected due to the availability of pesticides and improved knowledge of control practices among farmers ([FEWSNET](#)).

Figure 5: Burundi Crop Calendar. Source: FAO GIEWS



2.

Food Reserve (SFR) became the major supplier of maize in the 3rd and 4th quarter, offloading about 3.1 million bags to domestic maize millers through its disbursement processes (Table 4). These supplies helped stabilize prices and prevented further price spikes during the year (Figure 6), illustrating the importance of SFR's mandate in price stabilisation. Despite the relatively high prices, a slight decrease in prices was noted in the producer region of Eldoret where prices decreased by 7.8% owing to the ongoing harvest which is set to improve market supply in the country. Therefore, Maize prices are expected to reduce in the coming months.

Maize prices remained relatively high in November and December with a slight increase observed in comparison to the October Prices. Maize in Nairobi was USD 394/MT ([RATIN](#)) in December, which was a 3.14% increase from the previous month. This is contrary to the seasonal trend, as prices tend to be on a downward trend during this time of the year. This is attributed to the delay of the short rains which led to late planting and which would lead to delayed harvest as currently witnessed in the country. This is also compounded by the speculative nature of the maize value chain as imports from Uganda have reduced as harvest is expected to begin or is ongoing. These forces have led to tightened stocks in the market hence the slight increase in prices. Maize Prices are however expected to gradually decline as market supply will increase from local production and will be compounded with imports from Uganda where the harvest is currently underway.

2. Grain Markets

Maize

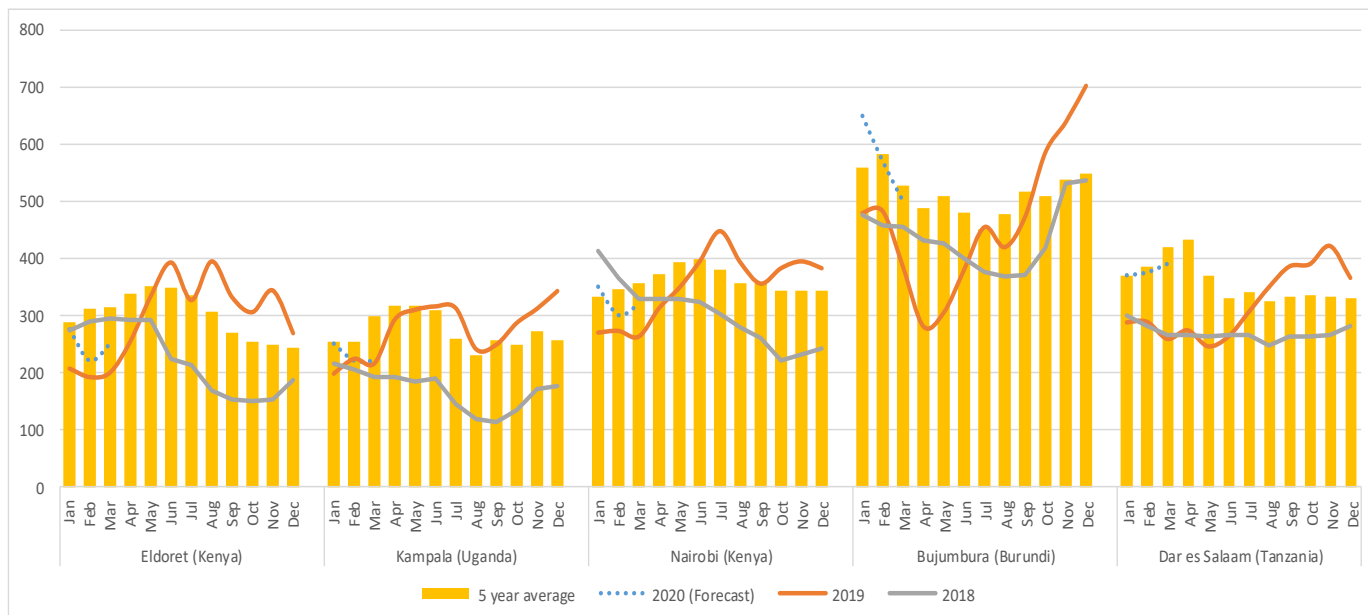
Maize prices in Kenya were relatively high and above the five-year average. This was due to tightened stocks owing to the below average long rains season; following depletion of stocks by the second quarter, the Strategic

Table 4: Strategic Food Reserve Stocks released

Period 2019	Estimated stocks released by SFR(90kg bags)
Q1	400,000
Q2	253,000
Q3	1,200,000
Q4	1,938,000
Total	3,791,000

In **Uganda**, maize prices maintained an upward trend in the 4th quarter, which is not typical during this time of the year. This increase is attributable to dwindling stocks from the previous season harvest and poor quality maize after continuous rains made proper drying difficult. The same was witnessed in November and December as prices slightly increased to close the year at USD342/MT ([RATIN](#)). However, the above average rainfall experienced throughout the region in the 4th quarter has favoured crop development and thus above average harvest is expected in the coming season, which will stabilize prices.

Figure 6: Maize prices in select markets in East Africa. Source - RATIN



In **Tanzania**, prices remained well above the five-year average and a slight increase in prices was noted in Iringa, Dar es Salaam and Arusha at an average of 4%. The high prices can be attributed to the effects of high demand for maize in the region, especially from the Southern African countries and depleting stocks from the previous harvest. With the country expecting the *Vuli* harvest around January and February 2020, prices are expected to stabilize as market supply will improve slightly. Maize closed the year at USD 365/MT in Dar es Salaam compared to USD 283/MT in December 2018 (RATIN).

In **Rwanda**, maize prices were high as compared to the same period last year, with an increase of 71% to USD 415/MT in Ruhengeri (RATIN) in December. That price increase is partly related to the closure of the main border post between Uganda and Rwanda, which remains closed despite discussions for a reopening. Moreover, dwindling stocks from a relatively poor Season B harvest also led to low market supplies, which led to an increase in prices.

In **Burundi**, prices are expected to trend seasonally but slightly below the five-year average owing to the favourable Season A and Season B harvests. Nevertheless, maize prices were higher than the same period last year with wholesale prices going as high as USD 702/MT in Bujumbura and USD 666/MT in Ngozi in

December (RATIN). The high maize prices are attributable to the shortened stocks from the season B harvest. This has also been compounded by high priced imports from neighbouring countries like Tanzania as most of the countries are awaiting harvest. Prices are expected to trend seasonally with above average harvests expected in the coming months due to favourable rainfall that was experienced from October to December.

Beans

In the 4th quarter, beans prices remained stable in **Uganda** owing to the steady supply in the markets owing to previous harvest supplies. Beans in Masindi retailed at USD 688/MT and USD 555/MT in Lira in December (RATIN). In Kampala, mixed beans went for USD 570/MT, yellow beans for USD 983/MT and red beans for USD 950/MT in December (RATIN). As stocks continue to decline due to the increasing demand from the region, the prices are expected to trend seasonally but above the five-year average in the 1st quarter of 2020.

Prices of dry beans in **Tanzania** remained below the five-year average owing to ample stocks. In Arusha, yellow beans were USD 873/MT and USD 1091/MT in Dar es Salaam in December, which represented an increase in price as the quarter progressed.

In **Rwanda**, stocks from the second season have helped to stabilize prices though an increase in prices is expected in the coming months. These prices will trend below the five-year average as planting season begins with positive looking prospects of the coming season due to adequate rainfall. Red beans retailed at USD 781/ MT in Kimironko and USD 731/MT in Kicukiro during the month of December.

Beans prices remained relatively high in **Kenya**. Mixed beans retailed at USD 710/MT, red beans retailed at USD 789/MT and yellow beans retailed at USD 927/MT in Meru during the month of December. The high prices were attributable to the below average harvest from the main season which saw supply being tightened to markets across the country.

In **Burundi**, beans prices were steady owing to above average food reserves from 2019 Season B harvests and anticipated favourable 2020 Season A harvests. This has been due to adequate rainfall received throughout the country favouring good crop development hence favouring high production. The prices are expected to remain steady with no spikes foreseen in the coming months.

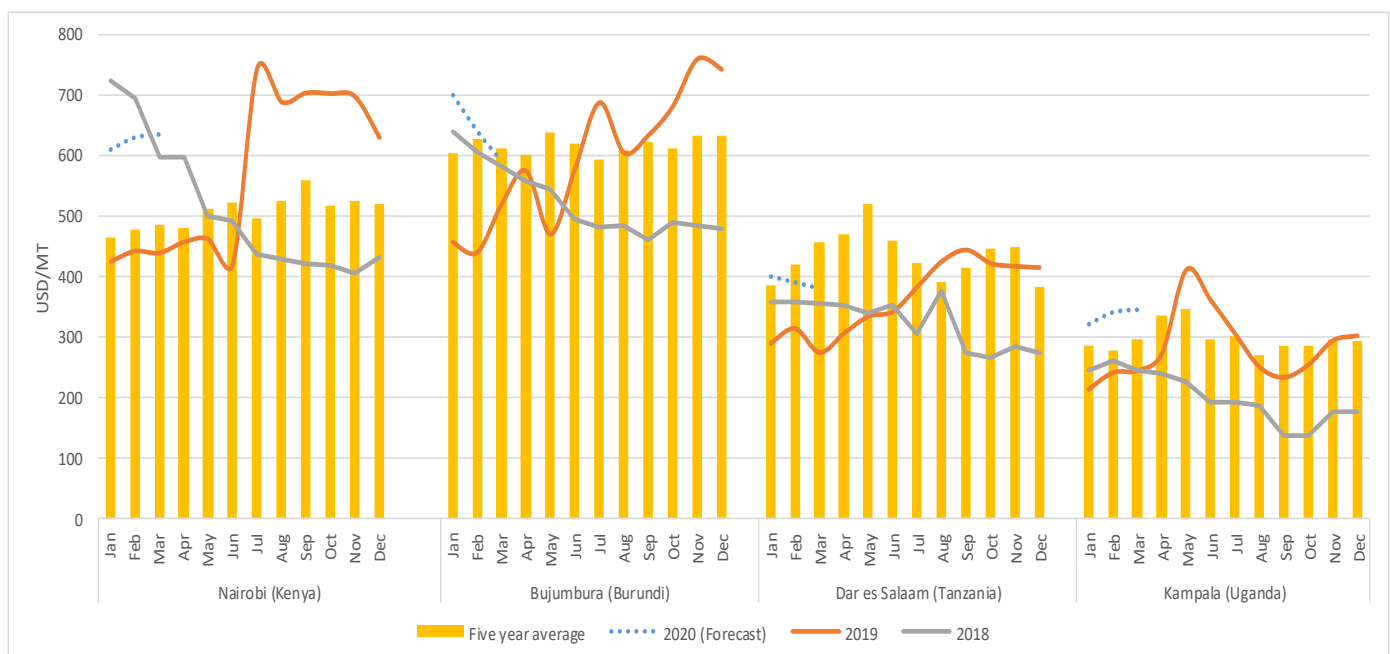
Red Sorghum

In **Kenya**, sorghum prices still remained above the five year average due to the below average long rain season performance, which led to below average harvests and higher prices above both last year's levels and the five-year average. However, there was a slight drop in prices towards the end of the year. This was attributable to the ongoing harvest from long rains season, which was delayed due to delayed onset of the long rains. Red sorghum retailed at USD 630/MT in Nairobi and USD 333/MT in Kitale ([RATIN](#)) during the month of December.

In **Uganda**, sorghum prices remained steady in the quarter owing to ample stocks from the previous harvest. Red sorghum retailed at USD 302/MT in Kampala and USD 266/MT in Gulu. Prices are expected to remain stable and trend seasonally in the coming months.

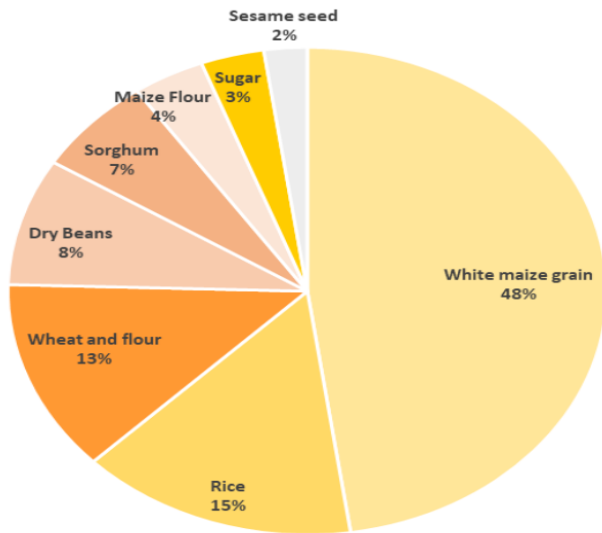
In **Tanzania**, sorghum prices were stable owed to the ample stocks from the *Masika* and *Vuli* harvests, which solidified supplies to the markets. Prices are expected to trend seasonally in the coming months with no foreseen spikes in prices.

Figure 7: Red Sorghum Prices in Select Markets in East Africa in USD/MT. Source-RATIN



3. Grain Trade

Figure 8: Main Staple Food Commodities Informally Traded Across Selected Borders in Eastern Africa in the Fourth Quarter of 2019. Source: FEWSNET and EAGC

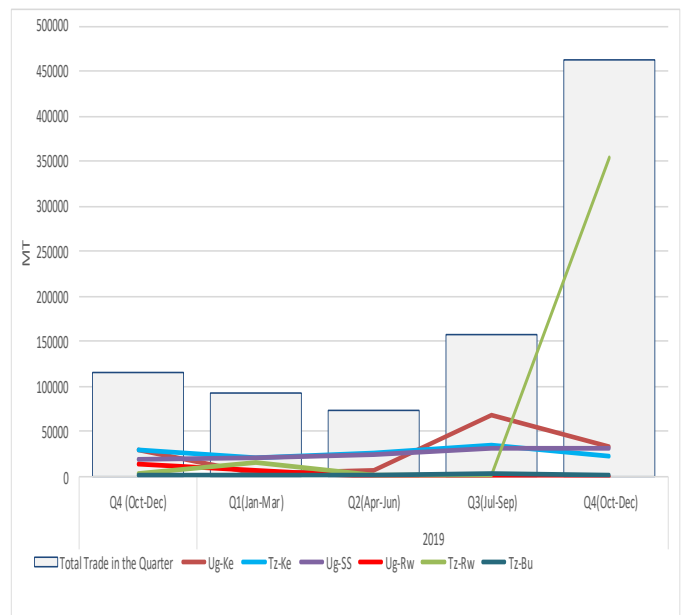


In the 4th quarter of 2019, maize grain was the main commodity traded in Eastern Africa. These trends include unusually high maize exports from Tanzania to Rwanda to replace traditional supplies from Uganda following border closures between the two countries. In addition, exports from Uganda to both Kenya and South Sudan have increased due to high demand and improving market functionality respectively (MAS Group). Compared to the previous quarter, maize trade increased by 18% and dry beans trade reduced by 9% of the total trade in the region. Wheat, rice and sorghum trade maintained similar percentages of total trade in the region.

Maize

Maize trade in the 4th quarter increased significantly as compared to the previous quarter. This was mainly due to exponentially high imports of maize from Tanzania by Rwanda, which accounted for 76% of maize trade in the region. This was because of the concerted efforts by the Rwandan government, private sector and humanitarian organisations to find replacement for imports from Uganda following the border closure and trade restriction between the two countries. Trade between Uganda and Kenya accounted for 7% of maize trade in the region, which was approximately 32,196.5 MT down from 67,000MT in 3rd quarter as Kenyan buyers switched to the domestic crop from the long rains harvest. Trade between Uganda and South Sudan accounted for 6% equivalent to 31,000 MT of maize. Maize trade is expected to ease in the first quarter 2020 as domestic supplies are set to increase due to ongoing harvest in Uganda, Kenya and *Vuli* harvest in Tanzania.

Figure 9: Quarterly Sum of formal and Informal cross border trade of Maize in main trade corridors in Eastern Africa. Source: RATIN and FEWSNET



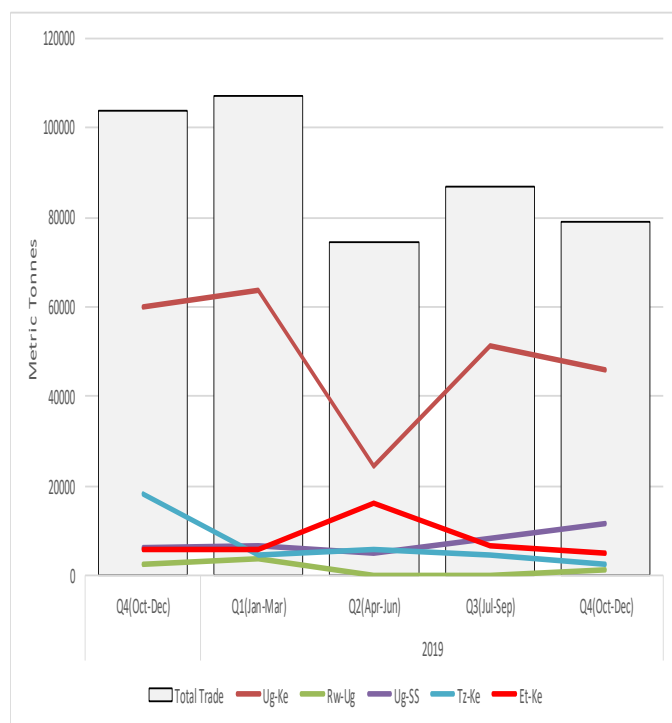
Beans

Trade in beans slightly decreased in the 4th quarter with declining availabilities from the second season crop in Uganda. Total trade through monitored corridors decreased by 9% compared to last quarter and 23% lower than the same period in the previous year. Trade from Uganda to Kenya decreased by 10% despite accounting for about 80% of Uganda's exports with availability and lower prices attracting traders from Kenya. Uganda also exported 11,400MT of beans to South Sudan during the quarter, representing a 35% increase from the previous quarter due to increased demand given the looming famine crisis in South Sudan. In Tanzania, trade in the 4th quarter decline by 48% compared to the previous quarter. This decline was seasonal as the country was in the lean season. Trade is however expected to slightly pick up as the harvest of the *Vuli* season in February.



Intraregional Maize Trade between Kenya and Tanzania: Loading bay in Arusha

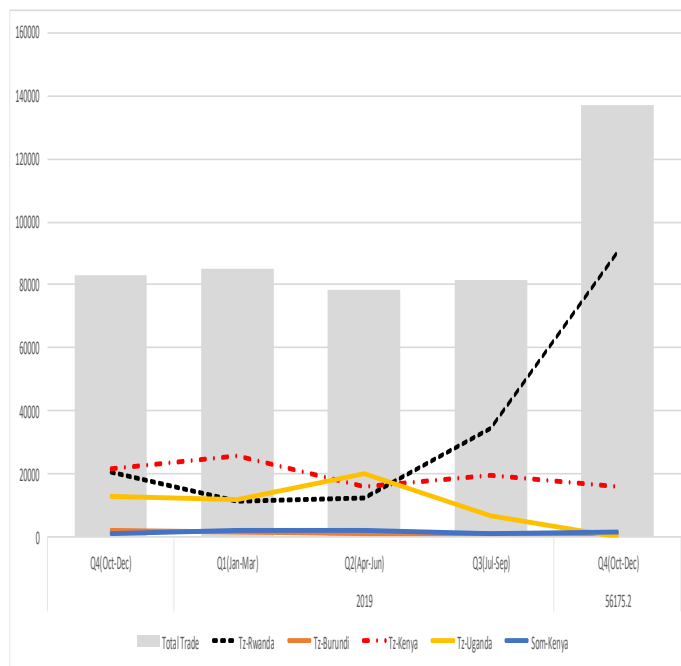
Figure 10: Quarterly sum of formal and informal cross border trade of dry beans in main trade corridors in East Africa. Source: FEWSNET and RATIN



Rice

In the 4th quarter of 2019, rice trade in the region increased by 59% compared to the previous quarter in the monitored borders. Intra-regional trade was dominated by Tanzania, which accounted for 78% of the total trade in the quarter, which translated to 107,236MT. Exports from Tanzania to Rwanda increased significantly to 90,625MT followed by exports to Kenya which amounted to 15,682MT. This is mainly attributed to increased demand from Kenya and Rwanda due to below average performance from the previous seasons which led tightened supplies to local markets. This is likely to change in the first quarter of 2020 as stocks from the main season in May to June are expected to decline. Exports to Rwanda are expected to decrease with the ongoing first wet season crop.

Figure 11: Quarterly Sum of formal and informal cross border trade of rice in main trade corridors in East Africa. Source: FEWSNET and RATIN



4. Outlook

Maize prices are expected to ease in the first quarter of 2020 given the above average rainfall experienced across the region especially in Kenya and Uganda where harvest is currently underway but will however increase towards the end of the quarter due to tight maize supplies as demand increases in the structurally deficit countries in the region (Kenya, Somalia, South Sudan, Rwanda and Burundi). Maize prices in Tanzania are expected to remain high given the high demand from the South African countries given the drought experienced in the region. Maize trade is therefore expected to increase in the first quarter of 2020 with Tanzania, Ethiopia and Uganda being the main source of maize in the East Africa region because of available stocks at lower prices.

Dry beans prices are expected to remain above last year and five-year average levels across key markets in East Africa because of unseasonably heavy rains that damaged maturing crops in the field resulting in below average production, disrupted harvesting activities and delayed entry into market. supply. Bean prices are expected to remain significantly above average levels in most markets in Rwanda because of costly replacement of supplies from Tanzania following trade restricting border closure with Uganda.

Red Sorghum prices are expected to increase in Uganda due to increased demand for sorghum in Uganda's domestic

alcohol production which will correspond to reduced exports to Kenya. This will also push prices in Kenya's capital to above five year averages..

Rice prices are still expected to remain high above five year average levels with high domestic and regional demand which calls for efforts to import from the international markets to meet the high demand in most markets in the region. High regional demand, export parity prices in Tanzania will likely remain above recent five year levels. Imported rice prices are expected to be similar to last years levels.

5. Agricultural Trade Policy Developments

A. The 8th African Grain Trade Summit

The Eastern African Grain Council (EAGC) successfully hosted 8th African Grain Trade Summit in Mombasa, Kenya from 3rd to 5th October 2019. In attendance were more than 250 grain industry leaders, researchers, service providers, innovators and development partners from 17 countries across 4 continents, in addition to 19 exhibiting companies.

The African Grain Trade Summit (AGTS) is Africa's premier grain industry event that is hosted biennially by the Eastern Africa Grain Council and its Partners. Its main purpose is to drive business environment improvements to support growth of grain sector agribusinesses, to facilitate business and investment partnerships and to share new knowledge and innovations that can be leveraged to drive growth of the sector.

With its theme being "Transforming Grain Trade Value Chains for a Prosperous Africa", the 8th AGTS delivered the following recommendations to guide the development of the grain sector in Sub-Saharan Africa:

- Improving competitiveness of the Grain Sector in regional and International Markets
- Harmonization of National, Regional and International efforts towards food security
- Removal of trade barriers to promote regional trade
- Coordination of Market information Generation and Management
- Collaboration between Public and Private sector will be key in promoting the grain sector
- Expansion of Financial support for the grain sector
- Opportunities for women and Youth in the grain sector
- Mitigation of Climate change

B. Grain Trade Mission to Ethiopia

On 22nd to 25th October 2019, EAGC in collaboration with Agricultural Transformation Agency-Ethiopia, with support of Ethio Agri-CEFT PLC, Halkayan Industry and Trading P.L.C, Belayneh Kindie Export & Import Ltd hosted a Grain Trade Mission of Kenya Grain Traders and Processors to Ethiopia. The objective of the Grain Trade Mission was to explore business opportunities for grain trade and processing between Ethiopia and Kenya.

Some of the key issues that arose during the grain trade mission include:

- The underlying trade potential between Kenya and Ethiopia is indispensable, having witnessed historic levels of grain trade between Ethiopia and Kenya through the facilitation of over 150,000MT of grain in 2017 by EAGC.
- The Kenya's demand for grain raw materials for industrial processing particularly soya beans used for processing of soya milk, soya meat and the by products used for animal feeds manufacturing is increasing, while the Ethiopian grain market offers a very viable source that can be competitive if well facilitated.
- Concerns about the quality conformity assessments, where consignments destined for Kenya from Ethiopia are required to have a unique Certificate of Conformity for each vehicle load, thus increasing the costs of intra-regional grain trade. However, EAGC has addressed the issue and now, only one certificate of conformity per batch or per consignment is required, there is need to follow up and ensure this is implemented.
- Complete transformation of the Moyale border into a One-Stop Border Post will facilitate cross-border trade between Ethiopia and Kenya; the modern facility is expected to enable a seamless clearance of goods and people across the border.
- Grain trade between Ethiopia and the East Africa Community is increasingly presenting an opportunity for Ethiopia to review the grain standards in harmony with the East African Standards for enhanced cross-border grain trade.
- Ethiopian government should consider signing the COMESA Customs Treaty Agreement to allow for duty free importation of all goods into Kenya.

EAGC will carry out the following steps on recommendations from the Grain Trade Mission:

- EAGC shall follow up with KRA and KEBS to ensure that the

requirement of one Certificate of Conformity (CoC) per batch or per consignment is implemented at Moyale border. grain to avoid delays at the busiest border, Beitbridge, which lies between South Africa and Zimbabwe.

- Trademark Ethiopia to facilitate the completion of the Moyale border into a One Stop Border Post for speedy clearance of goods and people across the border. The OSBP is yet to be automated.
- EAGC will work closely with the buyers from Kenya and the sellers from Ethiopia to facilitate the actualization of the Trade through the EAGC GSoko Grain Trade Service.

C. Removal of Interest rate capping in Kenya

In November, the government of Kenya removed the interest rate cap which was enforced in 2016 in a bid to lower the cost of credit. It set the maximum lending rate at no more than four percentage points above the central bank rate. This change came as the law had an adverse effect on the economy and reduced the amount of available credit. This change will facilitate the availability of more credit to businesses which will in turn increase the circulation of money.

D. Government of Kenya Initiatives of Post harvest management of Agricultural commodities

The government of Kenya pledge Kshs. 300 million to the Micro and Small Enterprises Authority for the construction of cold storage and processing facilities in Nyandarua, Meru and Kisii.

The president also directed the National Treasury to release Kshs. 660 million to the Kenya National Trading Corporation to purchase all the excess rice produced in Kano plains and Mwea for onward selling to various institutions in the country. This was in a bid to ensure that farmers sell excess rice produced in the region.

E. Zimbabwe lifts ban on genetically modified corn imports in a bid to avert famine

Zimbabwe has quietly lifted a ban on imports of genetically modified corn for the first time in 12 years in a bid to avert what could be its worst famine.

Zimbabwe is battling its worst drought in 40 years and its in the midst of an economic collapse which has left more than half the population in need of food aid.

According to reports, a logistic team has been sent to South Africa to oversee the grain import exercise and there are plans underway to provide special clearance for trucks bringing in

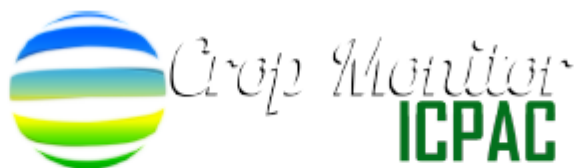
APPENDIX: RATIN Monitored Borders and Markets



Partnerships



ICPAC
IGAD Climate Prediction
& Applications Centre



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



**EARTH DATA FOR INFORMED
AGRICULTURAL DECISIONS**

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