

Building Blocks of Trade in Food

Biennial Report of Kilimo Trust



July 2012 – June 2014

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ACRONYMS AND ABBREVIATIONS

ACE	-	Area Cooperative Enterprise
AEZ	-	Agro Ecological Zone
BCtA	-	Business Call to Action
BEST	-	Beans Enterprises and Structured Trade
BMGF	-	Bill and Melinda Gates Foundation
CARI	-	Competitive African Rice Initiative
CGIAR	-	Consortium of International Agricultural Research Centers
CTA	-	Technical Centre for Agriculture and Rural Cooperation
DSIP	-	Development Strategic Investment Plan
EAC	-	East African Community
EAHB	-	East African Highland Banana
FAO	-	Food and Agricultural Organisation
GAPs	-	Good Agricultural Practices
GCF	-	Gatsby Charitable Foundation
GIZ	-	German Federal Enterprise for International Cooperation
Ha	-	Hectare
IFAD	-	International Fund for Agriculture Development
ISABU	-	Institut des Sciences Agronomiques du Burundi
KEPHIS	-	Kenya Plant Health Inspectorate Service
KT	-	Kilimo Trust
MoU	-	Memorandum of Understanding
MSME	-	Micro, Small & Medium Enterprise
MT	-	Metric Tons
NGO	-	Non-Governmental Organization
NVRC	-	National Variety Release Committee
PHH	-	Post-Harvest Handling
RAB	-	Rwanda Agriculture Board
SME	-	Small and Medium-Scale Enterprise
UNDP	-	United Nations Development Programme
UoN	-	University of Nairobi
VC	-	Value Chain
VCISIS	-	Value Chain Institutions, Support Institutions and Services
VSLA	-	Village Savings and Loan Associations



LETTER FROM THE BOARD CHAIRPERSON

Prof. Joseph Mukiibi

To our Stakeholders and Partners,

In 2010, Kilimo Trust (KT) initiated a far-reaching transformation of the organization, to: i) change from a regional grant maker on behalf of global foundations, into ii) a “self-sustaining business” specializing in direct implementation and management of programs and projects in partnership with and/or on behalf of governments, international and regional organizations, and the private sector; while iii) remaining a not-for-profit development organization.

The changes in our structural and operational designs had two key objectives:

- 1) To strengthen the process of building KT into one of its kind home-grown regional agricultural development organization in the East African Community (EAC) Region; and
- 2) To diversify our partnerships so as to enhance our ability to innovate and become a key player in driving dynamic change in food security in the EAC.

We therefore chose our core business to be supporting the transformation of food and nutrition security in the EAC Region away from high risk subsistence farming into lower risk trade-based systems. The vision of success is, within 15 years, to see:

- a) Specialization in production of staples to:
 - i) effectively utilize comparative advantages; and
 - ii) enable smallholder producers of key food commodities to “farm as business” and become competitive.
- b) A structured regional trade in foods driven by the private sector
- c) A high proportion of the food commodities (especially perishables) produced in the EAC processed into high value differentiated products.

June 2014 marked the end of the first 3-year period of pursuing the transformation process, the new strategy and our core mission as stated above. We are therefore pleased to present our results for the two year period starting July 2012 and ending June 2014. We encourage you to review this report to note the results we produced and the progress we made in our ambition to transform ourselves as well as the food sector in the EAC.

For instance, one key source of excitement came from the fact that the period reviewed in this report coincided with the time when all the five EAC Partner States (Burundi, Kenya, Rwanda, Tanzania and Uganda) were celebrating 50 years since independence. We are proud that in November 2013, we provided leadership in implementing an international symposium that brought together key stakeholders, experts and leaders from the EAC to critically assess what worked well; what did not work well and the lessons learned in agricultural development during the 50 years since independence.

We welcome you to visit www.kilimotrust.org to review the exciting output from this symposium.

While celebrating the progress we made over the two years as reported in this report, we also recognized that we needed to be sure that we are on track. To support this we commissioned an intensive external review to assist us look in a more objective and critical way the performance of KT in the first 3 years of transformation. We are happy that the review confirmed that our change in strategy and focus was timely and that the initiated transformation will enable us to become a regional leader in our mission and core business.

However, the review found that there was a mismatch between the business portfolio, on one hand, and the organizational structure that was based on subject-matter themes on the other. The review recommended and the Board agreed that we should deepen the re-structuring towards an organizational structure based on a small core team and a larger project-based teams who are hired for the duration of specific projects. We have embarked on this, but with an eye on ensuring we remain a single organization through strong collaboration across the different project teams. We also have updated our values and behaviours to emphasize collaboration and high ethical standards.

We will also continue with and expand the research function of the Trust focusing on markets and policy analysis to enable KT provide evidence-based design of projects as well as advice and advocacy in the EAC.

We sincerely thank our partners for the continued confidence placed on us in implementing projects and other activities on their behalf. We would not have seen the results we delivered without the dedication and work beyond the call of duty by the Board of Trustees. We say thank you very much. We want to congratulate the team KT for their dedication which immensely contributed to the success we continue to see in the transformation of the organization.

The transformation has gone very well due to the inputs of all our team members regardless of position. We are convinced that the attitude and commitment to work by the team we assembled at the end of the re-organization has created a great foundation for an organization that is truly bold by design.



Prof. Joseph Mukiibi
Chairperson, Board of Trustees



STATEMENT FROM THE C.E.O

Prof. Nuhu Hatibu

Our esteemed stakeholders, funders, clients, and implementation partners; we are happy and proud to share a report of the technical and financial results of Kilimo Trust for the two year period of July 2012 to June 2014.

We invite you to go through this report which captures some truly exciting results and lessons from our work in the EAC Region over the two financial years. The period reviewed in this report was both exciting and challenging for us in Kilimo Trust, with respect to our mission to “catalyze the growth and competitiveness of strategic agricultural sectors for the benefit of a large number of people in East Africa”.

The first source of excitement came from the results we produced and the lessons we learned while pursuing our core business. It is during the period under review that we rolled our sleeves in the implementation of our first project which truly focused at the development of food trade – the Development of Inclusive Markets in Agricultural and Trade (DIMAT) project designed to support producers of beans, cassava and rice in Uganda to link effectively with national and regional markets. The partnership we built with UNDP Uganda and key agencies of the Government of Uganda in the implementation of DIMAT have been tremendous. The work and lessons from DIMAT were scaled-out to regional level through our regional program – Bean Enterprises and Structured Trade in the EAC (BEST-EAC).

The second source of excitement came from the work we did in structuring our rice sector development program leading to us joining as a member, and lead implementer for Tanzania, of the Pan–African Consortium led by GIZ to implement the Competitive African Rice Initiative (CARI). The CARI program under development since November 2012 was launched in Abuja on 19th February 2014. It is a 4 year program covering Burkina Faso, Ghana, Nigeria and Tanzania. The start of this project enabled us to register and launch Kilimo Trust – Tanzania, the first step in implementing our ambition to have a subsidiary in each of the EAC Partner States. Coupled with this, were the results we achieved in partnership with IFAD towards the development of the Regional East African Community Trade in Staples (REACTS) project.

More importantly, we are very excited and satisfied by all the other strategic partnerships that we initiated, developed and sealed during the period under review. We achieved tremendous results in enhancing our partnerships with the EAC organs, governments of the EAC Partner States, key private sector players in the agricultural value chains in the EAC, some key international development funders, and a good number of potential consortia partners for implementation of projects.

The exciting results came along with challenges the key one being the coming to an end of the nearly nine years of tremendous core support by the Gastby Charitable Foundation (GCF), which generously invested in founding Kilimo Trust in 2005. On behalf of all who have benefited from our work through the support, we say thank you very much GCF, for assisting in nurturing Kilimo Trust to become what it is, a truly home-grown regional agricultural development organization for the EAC Region.

As the people and leaders of the EAC Partner States continue to strengthen the East African Common Market, for example with the ratification of the Monetary Union, our confidence in the importance and relevance of mission and core business we have chosen for ourselves, is growing in leaps and bounds. We are more than ever convinced of the need for deliberate and integrated regional programs to rapidly transform the food sector in the EAC.

So please, join us in this exciting journey.



Prof. Nuhu Hatibu
CEO

SECTION ONE: MAJOR OUTCOMES FROM THE PORTFOLIO OF PROJECTS

1.1 Structuring trade: beans worth us\$ 357,600 traded at national level while us\$ 141,000 worth of beans crossed borders

Beans production has been erratic in the EAC region, despite its high ranking as one of the main food stuffs. Trade in dry beans is not expanding in proportion to production, population and urbanization.

Besides, consumption of beans among the middle income earners is dropping because of: a wrong perception built over many years to assigning bean meals an inferior status; the flatulence resulting from eating beans meals and little attention on building consumers' demand by most of the programs targeting the bean sub-sector. Consequently beans are losing their market share among the urban population who have high preference for processed and convenient foods.



Figure 1: Bean meal in a school feeding programme

It is against this background that KT designed a program dubbed "Beans Enterprises and Structured Trade in the East Africa

Community" (BEST – EAC). It aims at optimizing food and nutrition security in the EAC Region by supporting consumer-driven markets and structured regional trade of beans and bean-food-products in the EAC. BEST-EAC has contributed towards streamlining marketing of beans, which has resulted to:

- i) US\$ 357,600 worth of beans traded within Uganda, Rwanda and Tanzania,
- ii) US\$ 141,000 worth of beans exported to the Kenyan market, and
- iii) 42% percent increase in farm gate prices in Tanzania due to improved quality of the dry beans and assured markets.

This positive impact on farmers' livelihoods was possible through interventions which included training farmers in areas such as Good Agricultural Practices (GAPs), good Post-Harvest Handling (PHH) practices and collective marketing which led to the establishment of 5 functional market linkages.



Figure 2: Bush beans planted in row, a Good Agricultural Practise

Training in GAPs has also resulted in improved access and utilization of agro inputs by farmers. For instance, in February-March, 2014 planting season, 300 producers from 26 producer groups in Southern Tanzania planted 240 Ha with 15.6MT of improved bean variety (Uyole 96), and used 30MT of fertilizers. The inputs were accessed using an input financing model of 50% upfront payment to Rogimwa Agrochem Company, an outcome of capacity building in financial literacy.

KT has also partnered with the University of Nairobi to select bean varieties with superior characteristics to meet consumer demand. The selection process has evaluated 70 lines of fast cooking varieties in Kenya. As a result, three climbing bean varieties with superior characteristics of reduced levels of flatulence were released. Four bush types were recommended to Kenya Plant Health Inspectorate Service (KEPHIS) for release by the National Variety Release Committee (NVRC) of Kenya. Forty of these lines are under adaptation trials in Uganda and Burundi.



Figure 3: Climbing bean variety being tried in Burundi

Despite KT's intervention and results achieved, there is still a huge gap that requires partnerships and funding in order to effectively streamline trade in beans in the EAC.

1.2 Transforming market opportunities into income

Market access and growth potential for a number of agricultural products is constrained by many factors including: low purchasing power in producing areas, weak market chains, inadequate economies of scale, difficulties in linking small and medium enterprises (SMEs) with market buyers, difficulties in conforming to produce quality requirements, negative attitudes towards commercialization, and inadequate post-harvest handling facilities especially storage. Although many agribusiness development programs have been designed and implemented, few effectively address market access.

In 2012, KT started implementing the "Development of Inclusive Markets in Agriculture and Trade (DIMAT) Project". The project is designed to build inclusive business approaches between agricultural Micro, Small and Medium Enterprises (MSMEs) and other Value Chain Actors (VCA). It is implemented in 17 districts in Northern, Eastern, Central and Western Uganda. The project has successfully changed the status quo by building strong formal relationships between VC actors using the business linkage approach and piloting of Business Call to Action (BCtA) initiative. Livelihoods of VC actors have been transformed through better incomes earned from rice, beans, cassava and passion fruit enterprises.



Figure 4: Patrick Muganga in a monitoring mission of passion fruits under the BCtA model of DIMAT

The strategic interventions in these were as a result of participatory studies undertaken by KT for 5 commodities (rice, coffee, honey, cassava, beans) which provided a deeper understanding of the gaps and opportunities. The studies also acted as decision support tools for selection of the priority VCs and identification of key intervention areas. Three VCs were selected namely: rice, cassava and beans.

The project has succeeded in improving MSMEs' access to productive assets. Their capacity to assess and choose appropriate available productive assets that suit their requirements has been built through formally linking them to service providers and building their capacity in financial literacy; proper post-harvest handling and GAPs. Out of the 47 service providers identified, 17 have been formally engaged. A total of 1,420 producer MSMEs have accessed improved seed or production loans. Of these, 950 accessed 6,790 MT of high quality seed and 470 accessed production loans from different financial institutions worth USD173, 000.

A savings culture is being established among smallholder farmers as a result of capacity building they received from the project. One thousand and sixty six farmers opened accounts with commercial banks

and SACCOs to save and access financial products and services.

Fourteen new Village Savings and Loan Associations (VSLAs) have been formed mainly in Northern Uganda and by June 2014 each VSLA had on average saved UGX 250,000. One of the lessons learnt in implementing this project is that internal capital mobilization through promotion of savings is the cheapest source of finance and is more sustainable. This is because many MSMEs do not meet the requirements for accessing loans from financial institutions.

Producers have been linked to buyers and the following results achieved: twenty two. Twenty two pre-season supply contracts were signed between producer MSMEs in all project intervention areas and 5 market off-takers. The contracts involve supplying over 6,000MT of rice grain valued at USD 2.7 million, 675MT of rice seed valued at USD311,500, 100 MT of Bean seed valued at USD 57,000, and 1,940MT of High-Quality Cassava Flour/chips valued at USD 895,000.



Figure 5: Properly stored paddy awaiting milling

Prior to signing of supply contracts, MSMEs were equipped with skills and knowledge on how to: prepare production plans; bargain and negotiate with off-takers; determine mark-up and competitive price using cost benefit analyses; and understand basic concepts of memorandum of understanding (MoUs) to enable them establish formal working

relationships with other VC actors. A total of 36 MoUs were signed between producer MSMEs (15,000 producers) and 12 market off-takers as a result of the capacity building initiatives. Consequently, the attitudes of MSMEs and off-takers' to formalize their operations with their clients changed. This led to improved profitability and reduction of risks involved in business operations especially those related to market access.

The project was also able to build the capacity of private sector companies to develop innovative business models under the Business Call to Action (BCtA) initiative. This initiative integrates low income communities (the poor) as suppliers, employees, distributors or consumers in companies' supply chain with the aim of generating profits for both the business and low income communities as well as create some social impact on the livelihoods of the poor, thus directly reducing poverty. Four (4) innovative pro-poor concepts were developed. These include: up-scaling commercialization of disease free cassava planting materials production in Western Uganda by FICA Seeds Ltd; up-scaling the mobile van banking model to reach farmers in areas without physical bank branches by Postbank; access to low cost irrigation pumps by Kick Start and access to low cost solar lighting in off-grid areas in Northern Uganda by Agrinet.



Figure 6: Farmers taking advantage of mobile banks to open accounts in Easter Uganda

1.3 Opportunities for investment in the Rice value chain in the EAC

It has been estimated that half the world's population subsists wholly or partially on rice. Rice provides 21% of global human per capita energy and 15% of per capita protein. Rice is also the most important crop to millions of small holder farmers, and to the many workers who derive income from working on value chain. Interventions in the rice value chain therefore have a potential to impact on the lives of millions of poor people. In the future, it is imperative that rice production continue to grow at least as rapidly as the population, if not faster. Rice research that develops new technologies for all farmers has a key role to play in meeting this need and contributing to global efforts directed at poverty alleviation.

The decade to 2012 saw significant increase in rice consumption in the EAC at an average rate of 4%/year, a trend projected to continue in the foreseeable future. This has made rice the second most important staple in the EAC, after maize, with an estimated consumption of about 1.8 million MT in 2012. With an annual regional production of rice standing at an average of 1.25 million MT, a deficit of about 0.55 million MT is met through cheap imports especially from Asia. This presents an opportunity to promote locally produced rice.

In the financial year 2012/2013, KT under took a robust analysis of the Rice sub-sector in the EAC to better understand the opportunities and constraints. The key findings of the study include low competitiveness of the local rice industry despite the possible opportunity of substituting imports. This is caused by 4 factors:

- i) small scale operations making mechanization uneconomical hence low productivity of labor;

- ii) low use of improved inputs (seed and fertilizers) resulting into low yield (1.5MT/ Ha – 2MT/Ha) compared to 5MT/Ha in China and 6MT/Ha in Vietnam;
- iii) thin markets especially of the highly productive non-aromatic rice varieties discourage producers from upgrading their crop farming from subsistence to commercial; and
- iv) inefficiency in milling resulting to poor quality rice that compete poorly with imported better quality brands that are well packaged.

Another finding of the study was the harsh rice trade environment in the EAC region to the local actors due to: i) Non-tariff barriers (NTBs) that include export bans, corruption, and lack of fool-proof technologies for quality. The end result is delayed supply of rice and high consumer prices driving further down affordability; ii) high cost of transportation as a result of poor state of roads. Transportation costs can make up to 50% of the consumer prices of rice; and iii) tariffs on imports that unfortunately have not helped boost local production due to the low levels of productivity.

The output of this study was a report on “Expanding Rice Markets in the EAC” which was published (copy can be found on KT website: www.kilimotrust.org). It is currently being used by stakeholders in the rice VC to design strategic interventions that can effectively transform the VC.

A major outcome of this study was a project called Competitive African Rice Initiative (CARI) which was designed using information from the study. The project is currently being implemented in Tanzania.

1.4 Testing the cluster approach in transforming rice value chain in Tanzania

Kilimo Trust has been subcontracted by GIZ to implement CARI’s Tanzania component. Other countries covered by the project are Burkina Faso, Ghana and Nigeria. This 4 year project was launched in Abuja on 19th February, 2014 and in the Tanzania component was launched in October same year in Dar es Salaam.



Figure 7: H.E Ali Hassan Mwinyi, retired president of the United Republic of Tanzania officially launching CARI Tanzania

In Tanzania, the project is targeting to improve the livelihoods of 30,000 (30% must be women) smallholder farmers of rice by increasing the competitiveness of domestic rice supply to meet the increasing regional demand.

The project is being implemented using a cluster model to incentivize and leverage private sector partners’ investment in the Rice VC in Tanzania.

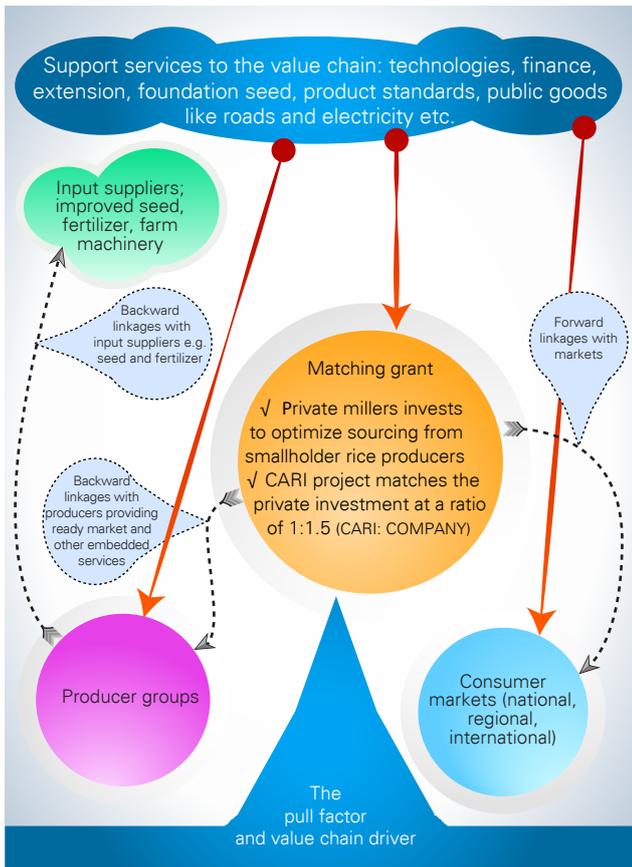


Figure 8: Cluster Model

Under this approach partners bring in their specific experience and know-how to up-scale and further optimize rice production systems including smallholder and large scale commercial farming entities. The lead firm in the consortium is a rice processor who coordinates the activities of other members who include: smallholder farmers, input suppliers, financial and other service providers. This model was chosen for its efficiency in providing end to end services along the VC while galvanizing VC deepening and upgrading; hence achieving intended outcomes of the project. Private sector partners are funded up to 40% by the program through matching grants and are required to invest the other 60% in implementing project activities.

The CARI Tanzania – a USD 3.75M project-forms an important component of the long-term East African Rice Development Program of KT - a USD 10M program. This program aims at supporting the transformation of the

rice sub-sector in the EAC region away from high risk subsistence farming into lower risk trade-based systems. KT welcomes development partners to join in and fill the existing funding gap.

1.5 Investing in Agro-industry in the EAC

It is estimated that the size of the agricultural market in Africa is about US\$68.2Bn annually and growing, with US\$49Bn of this being the size of the domestic market for staple foods (UNIDO, 2011). Private investors are increasingly attracted to the sector, as the world’s demand for high-value agricultural products has been growing steadily in the past twenty years. This trend represents a great opportunity to increase investment in agriculture, which remains underdeveloped due to market imperfections that impede investment flows into technically and economically feasible agribusiness opportunities.

In 2012 KT laid the foundation for harnessing the agribusiness potential in the EAC by undertaking a study on the state of Agro-industries in the EAC and published as “the East African Agro-industry and Agro-Enterprise Development Programme (E3ADP) report”. This programme was in response to the endorsement in Abuja, Nigeria, of the African Agribusiness and Agro-Industry Development Initiative (3ADI) by African Union (AU) Heads of State and Government in March 2010. KT carried out this study using a participatory approach where various stakeholders including: agro-industry practitioners, policy makers and service providers were consulted. The study came up with the following four key findings and recommendations.

First, acceleration of regional consumer food markets in the EAC, alongside that of selected food commodity export markets is one of the

most critical areas that require attention, as a means of driving market-oriented changes in the agro-food industry in the EAC. The regional market for food products particularly staples presents the best opportunity for establishing a base for upgrading the agro-industry in the EAC. This will create a strong multiplier effect with respect to income, food, and nutrition security of the majority of people, as well as externalities in support industries (such as packaging) and service markets (such as transport and finance).

Second, the most important staple food commodities for agro-processing in the region are beans, dairy, maize, vegetables, meat (cattle), cassava and rice.



Figure 9: A rice processing plant in Jinja, Uganda

Third, agro-processing is the most highly ranked industrial sub-sector in the region. However, attention needs to focus on creating a critical mass of medium and large scale agro-processing firms to catalyse rapid industrialisation of the food industry in the region, away from primary processing. This will be especially effective if done in a way that facilitates entrepreneurship development among youth and women in the region as well as reversing the current trajectory of primary processing and informality to aid competitiveness of the subsector.

Fourth, the most critical factor to address in enabling the upgrade and growth of the agro-industry sub-sector in EAC are: skills, agro-processing technologies, packaging, raw materials and finance.

The main output of the study was a report on Status of Agro-industry in East Africa. The outcome of the study was an Agro-industry Investment Strategy. The report and the strategy were both commissioned by East Africa Community Secretariat and funded by UN-FAO.

It is anticipated that the strategy will revolutionise and guide investment in the agro-industry in the EAC which will result in more agro-industries that will tap into the big agricultural market. This will lead to improved household incomes for farmers and workers in the industries which will catalyse development in the EAC.

1.6 Upgrading small and medium agricultural enterprises in Tanzania and Uganda

Small and Medium Scale Enterprises (SMEs) play an increasing role in earning income and creating employment. In Tanzania, it is estimated that a third of gross domestic products (GDP) originates from the SME sector while in Uganda it contributes about 75%. SMEs are even more critical in food staples sub-sector because they serve a role of collecting, handling, processing, storing and trading, often on a daily basis, food staples from millions of small scale producers and then making that food available to millions of low income and low volume consumers.

However, most agricultural SMEs are informal, poorly developed and inadequately supported which limits their ability to compete in global, regional and domestic markets. Their full potential is constrained by

developmental and operational challenges that include: inadequate capital, weak internal management processes, limited market access, complex regulatory and administrative environments as well as poor agricultural infrastructure. This situation is exacerbated further by inadequate and inaccurate information to agricultural SMEs on market opportunities. More seriously, non-farming SMEs involved in the food staple VCs are often: ignored by agricultural and rural development programs; not given support by the extension service and left out of services such as training, market information, stable logistics and access to new technologies and innovations.

It is against this background that KT undertook a 3-phase study aimed at identifying limitations of SMEs and providing recommendations for maximizing their potentials. The study focused on 7 VCs: bananas, beans, cassava, dairy, maize, rice and sweet potatoes. The following six key findings and recommendations came out of the study.



Figure 10: An small seed outlet in Uganda

First, SMEs and Value Chain Institutions, Support Institutions and Services (VCISIS) in both Tanzania and Uganda are constrained by: inappropriate agricultural financial products, inadequate business and technical skills, low economies of scale and insufficient government support.

Second, historical oversight of agricultural VCs in economic development efforts in the EAC has resulted in limited if any information to guide investment in these VCs. As such, there is need to develop and operationalize a mechanism that can generate and disseminate accurate as well as real time information on investment opportunities in these VCs in order to increase market access.

Third, the structure of agricultural SMEs in Tanzania and Uganda are not significantly different in the case of: cereals (rice, maize and beans); and vegetative propagated crops (bananas, sweet potatoes and cassava). On the other hand, SMES in the dairy sub sector have clearly distinct structures. In addition, there were distinctive differences among small and medium enterprises at each node of the value chains. The most commercialized and profitable VC in Tanzania and Uganda is dairy, while the least commercialized and least profitable is sweet potato.

Fourth, the majority of the enterprises in the sweet potato VC are informal and opportunities for growth as viable business entities are limited. On the other hand, enterprises in the dairy VC are more developed in terms of management and capital employed since the sub sector is highly regulated compared to the other food staple sub sectors. Producers are the main actors in all the value chains profiled making more than 90% of all the enterprises.

Fifth, building capacity of VC actors will enable them access and utilize quality technologies as well as ameliorate the challenge of inadequate agribusiness and technical skills among them.

Sixth, there is an urgent need to support market leaders in the private sector to pilot innovative business development services (BDS) to sustainably compliment the public sector efforts in providing these services.

The output of the study was a profiling report on the most important SMEs and VCISIS across the 7 VCs. The report will be disseminated to various stakeholders of agricultural development in the EAC. It is expected that it will be used to guide investment in the development of agriculture using SMEs and VCISIS as facilitators.

The outcome of the study so far has been a program in which KT is studying the use of innovative ICT to accelerate efforts to alleviate the challenges of agricultural SMEs and VCISIS in Tanzania and Uganda.

1.7 Low levels of commercialization hurting the sweet potato value chain

Sweet potato is among the major food crops in the world. Africa produces over 14 million MT (14%) of global sweet potato production placing it 2nd after Asia which is the leading producing over 81 million MT (82%).

The ability of sweet potato to produce better yields in poor conditions with less labor and inputs makes it suitable as a crop for poor households threatened by civil disorder, migration, or diseases such as AIDS. Sweet potato requires lesser inputs and labor than other staple crops. It tolerates marginal growing conditions, such as dry spells and poor soil. Sweet potato provides more edible energy per hectare per day than wheat, rice, or even cassava.

However, the potential of sweet potato has remained largely untapped in Sub-Saharan Africa. Average yields are 10-times lower among small-scale farmers than those seen among commercial growers with access to irrigation, fertilizers, and credit.

In 2012 KT carried out a study to investigate how developing markets for sweet potatoes and yams and their processed

products would contribute to upgrading of relevant VCs in Tanzania and Uganda. The assessment was designed to focus on how such a development will positively impact low-income earners in both urban and rural areas with respect to food/nutrition security; enhanced incomes and creation of wealth for producers and other operators along the VC. The following were the findings

Sweet potatoes grow across a wide range of agro-ecological conditions with different varieties enabling adaptation to a range of climatic conditions. They are grown mainly by smallholder farmers using rudimentary technologies such as hand hoes and sickles with average farm size of 0.8 ha and who produce an average yield of about 4.2 MT/ha.

Although improved planting materials (vines) contribute significantly to productivity, only 28% of farmers in Tanzania and 38% in Uganda access them. In both countries there are limited suppliers of improved planting materials. Farmers end up using vines from previous harvests which tend to accumulate diseases over time reducing productivity. About 95% of planting material comes from such informal sources including from neighbors and local markets.

Sweet potatoes have lower priority in the allocation of household labor especially among producers growing other crops. All this 'subsistence thinking' has a negative impact on productivity with most producers operating independently and missing out on the benefits of collective action. This exacerbates the problem of low productivity.

Commercialization is stronger in Tanzania where 80% of the produce is marketed while in Uganda only 20% is sold despite the fact that Uganda is the leading producer in the region. This could be explained by the fact that in Tanzania the commodity is consumed as a snack while in Uganda it is a main meal.



Figure 11: Boiled sweet potatoes served as a snack

Primary processing is undertaken by smallholder producers at farm level and is mostly concerned with increasing shelf-life of fresh roots and is not driven by commercializing other products. Few farmers engage in processing and so value addition at the farm is of little economic benefit. In Tanzania, some sweet potatoes are processed into “Michembe” where the roots are cut into slices and dried; and “Matobolwa”, where the roots are boiled, sliced and dried. Both products extend shelf-life between 5 and 10 months.

The study recommended support to the production and sustainable supply of planting material by establishing a strong system for vine multiplication in disease free conditions; strengthening value chain institutions including, enhancing the voice of producers and organizing them into producer organisations (POs) for collective marketing and financial access; establishing a multi-actor platform for advocacy such as for optimal investments on infrastructure, linking different VC actors; and developing strategies for dissemination and adoption of existing proven technologies from other countries and from research organizations.

The output of the study was a 3-volume report on the demand and value chain analysis for sweet potatoes and yams grown in Uganda and Tanzania.

1.8 Peeling the potential of Bananas as a food and income security crop

In the East African Highlands and the Great Lakes region, bananas are a major staple food and a source of income for over 50 million smallholder farmers, mainly women. Banana production is dominated by the East African Highland Banana (EAHB), which includes both cooking and brewing varieties. Bananas serve as famine avoidance crop and provide a buffering bridge to food provision in times of scarcity between cereal harvests.

East Africa produces 16.4 million MT per year – about 20% of the world output. Uganda and Tanzania are the main producers of bananas in the EAC annually producing 10 million and 3.7 million MT respectively.



Figure 12: A meal of matooke and ground nut sauce: A Ugandan delicacy

Per capita annual consumption of bananas in Uganda is the highest in the world at 0.70 kg daily per person and mainly consumed as boiled bananas that are mashed (matooke).

A study by KT found out that four million small-holder households cultivate bananas and plantains earning an income of about USD 1,244 per household per annum making bananas one of the highest small-holder income generating agricultural commodities in the region.

Second, in both Uganda and Tanzania banana consumption is increasing, although in Uganda per capita consumption is falling. In Tanzania consumption exceeds production. Major drivers include: increasing urbanization, population growth and emerging new markets in Southern Sudan and DR Congo.

Banana consumption is most important at the household level with 70% of all the bananas produced in Uganda and 60% in Tanzania being consumed by the farming households either cooked or ripened as dessert. It could be deduced that the surplus of 30% and 40% in Uganda and Tanzania respectively is either sold or given out to friends and relatives as hand outs. In Uganda and Tanzania only, banana is a food staple to 13 million farming households. Bananas are therefore an important food staple for ensuring food security at the household level but also contribute significantly to incomes as well as social ties.

Institutions especially schools and hotels are the second important consumers of bananas. Schools purchase up-to 100% of all bananas sold to institutions in Rwanda whereas hotels in Burundi purchase up-to 80% of all the bananas sold to institutions. This finding points to an opportunity of investment for middle to large scale traders in fresh bananas to supply such institutions.

Production of bananas in Uganda and Tanzania has been on the decline for the past few years owing to low productivity. For instance, in Uganda, productivity reduced from 6 MT/Ha in 2001 to 5.4 MT/Ha in 2006. This low productivity is as a result of diseases especially the banana wilt, climate change, poor soil fertility, use of poor varieties of bananas and poor management practices. The productivity gap between the EAC and India, the world's largest producer is 15 MT/Ha.



Figure 13: Effects of banana wilt

Reversing the current trends of low productivity requires promotion of integrated soil fertility management and water conservation cropping systems. Such systems include crop-livestock intercropping, use of fertilizers and minimum tillage to conserve moisture. Due to the high susceptibility nature of bananas to diseases, actors in the VC should utilize improved varieties that are early maturing and free from diseases.

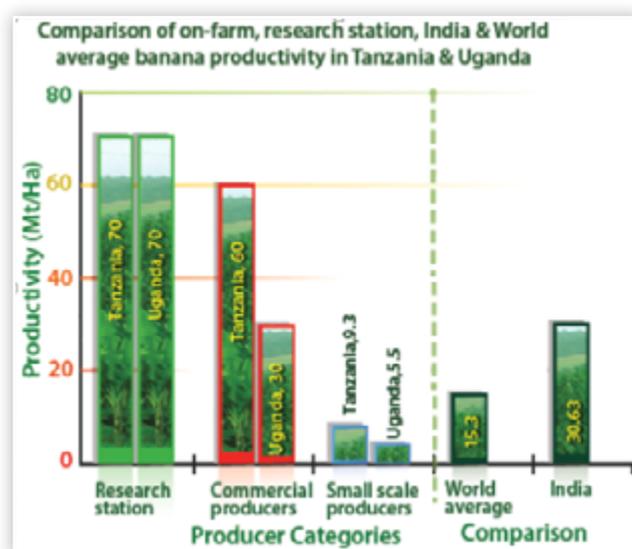


Figure 14: Comparison of on-farm & Research Station productivity of bananas

Processing of bananas into value added products is at its infancy with most efforts being projects for experimentation purposes. Some of the products that have been processed from bananas include juice, beer and snacks. However, the market has not been responsive to such value added products because of the high cost of processing involved resulting to high consumer costs and the sentimental value attached to fresh bananas.

There is low commercialization with 30% and 40% of the bananas produced in Uganda and Tanzania available for sale. Cross border trade in bananas is minimal and largely remains informal. For instance, Uganda the leading producer of bananas in the EAC region exports 1,200 MT and 20,000 MT of matooke to Kenya and Rwanda respectively and 5,000 MT of dessert to Kenya annually. The explanation to this low cross border trade in bananas is the bulk nature of fresh bananas and the high perishability making transportation over long distances expensive in addition to the fast rate of deterioration in quality. The two factors translate into narrow margins that are not attractive to investors in trading of fresh banana across borders. Export of bananas to international markets is insignificant. The low levels of current exports suggest that there is considerable potential for more international trade. Bananas being bulky and perishable, it would be inevitable to add value if opportunities provided by local and regional markets are to be harnessed.

Private and public sectors participate in the banana value chain. The government is mostly involved in provision of extension services as well as research to develop superior cultivars of bananas. On the other hand, private entrepreneurs invest in production and trade of bananas majorly in local markets with minimum exports. In some instances, NGOs are involved especially in projects to experiment new products within the VC.



Figure 15: Trade in fresh bananas in an open market, the common form of trade

The potential for bananas to increase food security and improve livelihood in the region are significant. However, in order to reap these benefits, increasing production is only one step in the process. Without complementary steps in crop handling, transport, processing and marketing, attempts to increase on-farm production will have limited impact. To access the report, visit www.kilimotrust.org

1.9 Fifty years of agricultural development in the EAC: taking stock and planning for the future

During the period of three years (2011 – 2013) - all the five EAC Partner States celebrated 50 years of independence. During this post-independence period, agriculture remained the most dominant sector in the economies of all the five countries. Therefore, in mid-2011, the Trustees of Kilimo Trust initiated the process of organizing an international symposium with the aim of bringing together key stakeholders, experts and leaders from the EAC to critically assess what worked well; what did not work well and the lessons learned. This process culminated with the convening of the International Symposium and Exhibition on Agricultural Development in the EAC, held in Kampala, Uganda from 4th to 8th November 2013 which coincided

with the build-up period to the 15th Ordinary Summit Meeting of the EAC Heads of State.



Figure 16: H.E. Edward Sekkandi the Vice President of the Republic of Uganda officially opening the symposium

The symposium was attended by over 350 delegates (with women making over 30%) from twenty (20) international, regional and national public and private organizations in the EAC and beyond participating in discussions and proposing recommendations. Seven (7) specialist side seminars were also held to add to the quality of the debate.



Figure 17: Opening session of the symposium

The symposium through a High Level Executive Roundtable (HLERT) of Ministers, Chief Executive Officers (CEOs) and Presidents of organizations from the EAC region identified five investment areas. These were derived from fifteen (15) technical papers and ten (10) case studies presented

during the main symposium and the Youth in Agriculture (YiA) workshop respectively.



Figure 18: HLERT meeting adopting recommendations from the symposium

The HLERT thus concluded that, there is need to harness the 'demographic dividend' presented by the youth through intentionally designing and executing strategies that attract and retain the youth in agriculture. With about 100 million of youth in East Africa and this number projected to grow to 250 million by 2050, the region will be among the youngest in the world. Case studies presented by young entrepreneurs during the YiA workshop highlighted two main challenges derailing the success of youth in agriculture as negative mindset of the youth regarding employment opportunities in the sector as well as the small scale of operation. The recommendation by the HLERT was to start a regional movement meant to recognize those youth who have already succeeded as a bait to attract and retain others to the sector. From the deliberations of the YiA workshop, Kilimo Trust has developed a concept note to tap into the opportunities in agriculture by addressing the twin challenges facing the youth.

It is important to design and operationalize end to end value chain financing models. While most commercial banks end up with huge balances as unabsorbed agribusiness

portfolio or end up transferring money meant for agribusiness to other sectors, the target beneficiaries of such portfolios complain that the banks are not willing to extend credit. The main reason for this dilemma is inappropriate financial products and services that are not tailored to meet specific needs of the agripreneurs on one hand and low absorption capacity of agri-finance on the other. The symposium recommended that coordinated financing programmes are required but in ways that do not distort the financial markets.

It is imperative that there is investment to reduce high risks (actual and perceived) in the agriculture sector in-order to attract private sector financing. Incentives to attract private sector funding into the agriculture sector include those that cushion the producers against adverse conditions like weather and diseases. A weather indexed agri-insurance was recommended as the long term sustainable strategy.

Improve post-harvest management practices of agricultural products to minimize the current up to 40% loss of grain and more in other commodities.

Currently, most agricultural commodities are not tradable because among other reasons, they are bulky and have short shelf life hence end up being consumed within the areas of production and any surplus goes to waste. To manage this challenge, it was recommended that regional programmes that recognize comparative advantages for producing agricultural products should be implemented with a focus on value addition in order to eliminate the self-sufficiency syndrome currently being experienced where commodities are grown in unsuitable zones. The first step was seen as supporting the private sector to modernize and expand

post-harvest handling and agro-industries technologies followed by enhanced capacity by producers to supply quality volumes to warrant profitable running of such agro-industries.

There is need to strengthen the input systems in the region. To ensure responsiveness from the production side of the agriculture sector, the input system should be efficiently working to deliver quality inputs and on time. For this ambition to become a reality, the capacity of producers should be built with an aim to increase the demand of improved inputs. The regulation mechanisms for the input sector should be strengthened to eliminate counterfeits and curtails who in most cases make inputs unnecessarily unaffordable. The starting point was suggested to be local fabrication of equipment and manufacturing of fertilizers and other selected chemicals to ensure availability and affordability of crucial inputs.

The above recommendations from the HLERT were submitted to the sectoral council of ministers through the EAC Secretariat and are awaiting discussions and possible adoption during the 7th sectoral meeting to be held in September, 2014 in Kigali, Rwanda.

All the papers that were presented have been published online at www.kilimotrust.org. In addition, the deliberations of the symposium were published into “Key Lessons and Recommendations report” and launched during the 2nd General Assembly of ASARECA held in Bujumbura in December, 2013 – reaching readers in more than 10 countries in Eastern Africa. A “Symposium Highlights Report” was also published in a book form and is available both in print and online at www.kilimotrust.org.

1.10 Summary of funds received by KT for project implementation from July 2012 to June 2014

For the past 2 years, KT's projects' portfolio has tremendously increased as illustrated in Table 1. This has been possible because of KT's partnerships with the following organizations: Gatsby Charitable Foundation (GCF), Bill

and Melinda Gates Foundation (BMGF), United Nations Development Programme (UNDP), International Fund for Agriculture Development (IFAD), Food and Agricultural Organisation (FAO) and The Technical Centre for Agricultural and Rural Cooperation (CTA) and The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH (German Federal Enterprise for International Cooperation) or GIZ.

Table 1: Funds received for project implementation by KT during the 2-year period from July 2012 to June 2014

No	Project /Program Name	Source of Funding	Project Period	2012/13	2013/14	Total
1	Development Of Inclusive Markets in Agriculture and Trade (DIMAT)	UNDP	October 2011 – Dec 2014	118,872	576,446	695,318
2	Beans Enterprises and Structured Trade in the EAC (BEST - EAC)	Kilimo Trust	July, 2012 – Dec. 2015	59,089	89,326	148,415
3	Support to EAC to Develop an EAC Agro-Industry and AgroEnterprise Development Program (E3ADP+ Others)	EAC and FAO	October 2012 – April 2014	115,174	42,693	157,867
4	Analysis of the Banana Value Chains in Tanzania and Uganda	BMGF	Nov 2012 – Nov 2013	180,634	-	180,634
5	Expanding Markets for Rice in the EAC Region – Phases 1 and II	GCF and KT Board	Nov 2012 – Nov 2013	237,680	-	237,680
6	Profiling of SMEs and Supporting Institutions & Organizations Value Chains of Staple Food Sub-sectors in Tanzania and Uganda	BMGF	March 2013 – August 2014	70,372	332,745	403,117
7	Demand and value chain analysis for sweet potatoes and yams	BMGF	April – July 2013	209,736	-	209,736
8	International Symposium on Agriculture in the EAC	Kilimo Trust and Partners	Nov 2013	19,509	463,669	483,178
9	Competitive African Rice Initiative	GIZ	Feb 2014 - Dec 2018	-	42,665	42,665
			Total	1,011,066	1,547,544	2,558,610

SECTION TWO: OUR HUMAN RESOURCE



Prof. Nuhu Hatibu
CEO



Dr. Joseph Nzomoi
Director



Michael Kairumba
Associate Director



Dr. Birungi Korutaro
Assistant Director



Christine Alokot
Assistant Director



Deus Tirwakunda
Leader of Finance and
Administration



Fiona Lukwago
Assistant Director



Dr. Mary Shetto
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Prisca Githuka
Assistant Director



Dr. Joseph Mudiopa
Senior Program Officer



Rogers Munywoki
Senior Program Officer



Anthony Mugambi
Program Officer



Donald Liya
Program Officer



Henry Mwololo
Program Officer



Lilian Githinji
Program Officer

OUR HUMAN RESOURCE



Mary Mera
Program Officer



Rachel Ajambo
Program Officer



Rachel Katana
Accountant



Rogart Mmole
Program Officer



Andrew Gashayija
Technical Assistant



Désiré Hakizimana
Technical Assistant



Eddy Frank Rugamba
Technical Assistant



Henry Mawanda
Technical Assistant



Jennipher Tibagonzeka
Administrative Assistant



Joshua Musoke
Supervisor



Patrick Muganga
Technical Assistant



Ramadhan Yateri
Accounts and
Administration Assistant



Rita Neumbe
Office Assistant



Salum Hamadi
Technical Assistant



Stephen Nsubuga
Driver



William Zimwe
Technical Assistant

SECTION THREE: FINANCIAL STATEMENTS FOR THE TWO YEARS ENDED 30 JUNE 2014

3.1 Our Finances

3.1.1 Financial history

Kilimo Trust (KT) was incorporated as a company Limited by guarantee on 22 July 2004. As a company Kilimo Trust operated between October 2005 and 9th January 2008 when it acquired Trust status under the registered name 'The Registered Trustees of Kilimo Trust' with 'Kilimo Trust' as the business name. KT is governed by a Board of Trustees with eight (8) members with equal vote on all resolutions of the Board.

3.1.2 Audit Reports

The Trust's financial statements were audited by KPMG during the two year period (2012/13 and 2013/14). The Trust received unqualified audit opinion during the two year period thus maintaining unqualified audit report since the start of Kilimo Trust in 2005.

Below is the extract from audited accounts for the two years showing the Statement

of Comprehensive Income, Statement of Financial Position, Statement of Cash Flows and Statement of Changes in Accumulated Fund for the two years.

3.1.3 Internal Control Systems

Kilimo Trust Board has established robust financial and accounting controls which have ensured value for money and efficient running of operations. This has enabled the Trust to achieve unqualified audited financial statements for the nine (9) years since the start of Kilimo Trust.

3.1.4 Performance

Kilimo Trust has been on a positive course to breakeven except for the disputed retrospective taxes levied worth US\$ 965,814 by URA in 2012/13 which increased the operating expenses as well as the deficit for the year. The Trust was able to recover US\$ 460,535 in the FY 2013/14 and continues to engage Uganda Revenue Authority (URA) for refund of the balance.

3.2 Financial Statements in United States Dollars (US\$)

3.2.1 Statement of Comprehensive Income

	2013/14 US\$	2012/13 US\$	2011/12 US\$
Revenue	1,458,218	1,249,563	55,320
Other income	483,043	79,333	35,125
Grants disbursed	(59,074)	(59,266)	(696,745)
Program Implementation Costs	(1,070,130)	(702,611)	(611,325)
Operating expenses	(2,008,978)	(2,730,620)	(1,129,193)
Provision for Loan Guarantee Claims	-	(45,809)	(507,506)
Surplus from operations	(1,196,921)	(2,209,410)	(2,352,324)
Finance Income	56,325	158,593	(155,802)
Surplus before income tax	(1,140,596)	(2,050,817)	(2,508,126)
Income tax expense	-	-	-
Surplus for the year	(1,140,596)	(2,050,817)	(2,508,126)
Other Comprehensive Income	-	-	-
Total comprehensive loss for the year	(1,140,596)	(2,050,817)	(2,508,126)

3.2.2 Statement of Financial Position

	2013/14 US\$	2012/13 US\$	2011/12 US\$
Equity			
Accumulated fund	4,212,354	5,352,950	7,403,767
Total equity	4,212,354	5,352,950	7,403,767
Noncurrent Assets			
Property and equipment	61,807	94,000	99,061
Recoverable Grants	20,190	47,142	113,255
	81,997	141,142	212,316
Current assets			
Receivables and prepayments	613,479	359,372	81,522
Cash and cash equivalents	3,816,821	5,297,727	7,643,592
	4,430,300	5,657,099	7,725,114
Current liabilities			
Payables and accrued expenses	299,943	445,291	533,663
Net current assets	4,130,357	5,211,808	7,191,451
	4,212,354	5,352,950	7,403,767

SECTION FOUR: PARTNERS AND SERVICE PROVIDERS

4.1 a) Founding Partners



Gatsby Charitable Foundation.
www.gatsby.org.uk



Rockefeller Foundation
www.rockefellerfoundation.org

4.1 b) Current Partners



UNDP Uganda
www.undp.or.ug



The East African Community
Secretariat
www.eac.int



Bill & Melinda Gates Foundation
www.gatesfoundation.org



Food And Agriculture Organisation
www.fao.org



Enterprise Uganda
www.enterprise.co.ug



Ministry Of Agriculture And Animal
Resources, Rwanda
www.minagri.gov.rw



Tanzania Horticultural Association
www.taha.or.tz



Nairobi University
www.uonbi.ac.ke



EAGC
www.eagc.org



CTA
www.cta.int



IFAD
www.ifad.org



SAGCOT
www.sagcot.com



giz
www.giz.de

4.2 Service providers

Bankers

KCB Bank Uganda Limited
P.O Box 7399,
Kampala, Uganda
Plot 1, Kampala Road, Commercial Plaza

Stanbic Bank Uganda Limited
17 Hannington Road
Crested Towers
P. O. Box 7131

Standard Chartered Bank Uganda Limited
5 Speke Road
P O Box 7111
Kampala-Uganda

Secretary

Kampala Associated Advocates
KAA House
Plot 41 Nakasero Road
P.O. Box 9566
Kampala, Uganda

Auditors

KPMG Uganda
Certified Public Accountants
3rd floor, Rwenzori Courts
Plot 2 & 4A, Nakasero
P. O. Box 3509
Kampala, Uganda

Registered offices

Kilimo Trust Head Quarters
Plot 42 Princess Anne Drive, Bugolobi,
Kampala, Uganda

Kilimo Trust Tanzania
First floor Plot 1481, Rufiji Street, Masaki,
Dar es Salaam Tanzania



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