

Voluntary Report – Voluntary - Public Distribution

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Report Name: Kenya's Pulses Market - Trends and Emerging Market Opportunities

Country: Kenya

Post: Nairobi

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Report Highlights:

Kenya is among the largest producer of pulses in Africa and a major consumer in Sub-Saharan Africa, with dry beans accounting for the largest share of production and consumption. Pulse production relies primarily on rain-fed agriculture and faces recurrent challenges from erratic rainfall, drought, pests, diseases, and limited access to improved seed, reducing the sector's ability to meet growing domestic demand. Kenya supplements local supplies through imports of dry beans, dry peas, lentils, and chickpeas from regional and international suppliers while exporting mung beans (green grams), pigeon peas, and other specialty pulses. U.S. pulse exports to Kenya remain limited but present opportunities for growth, particularly for dry peas, lentils, chickpeas, and value-added pulse products serving the food processing, institutional, and retail sectors.

Executive Summary.

Kenya ranks as the seventh-largest pulse producer in Africa and remains one of the continent's largest consumers, with dry beans accounting for the largest share of production and consumption, followed by mung beans (green grams), cowpeas, pigeon peas, dry peas, chickpeas, and lentils. Post forecasts 2026 pulse production to decline as below-average rainfall, prolonged dry conditions, pest and disease pressure, and limited adoption of improved seed and production technologies reduce yields across major producing regions. Growing population, urbanization, and increasing demand from households and the food processing industry continue to outpace domestic production. Kenya continues to export mung beans, black grams and pigeon peas, although export volumes fluctuate with production and regional market conditions. Regional trade remains critical in balancing domestic supply deficits. U.S. pulse exports to Kenya remain modest, but have opportunities for expansion, particularly for dry peas, lentils, chickpeas, and value-added pulse ingredients used by food processors, institutional feeding programs, and the expanding retail sector.

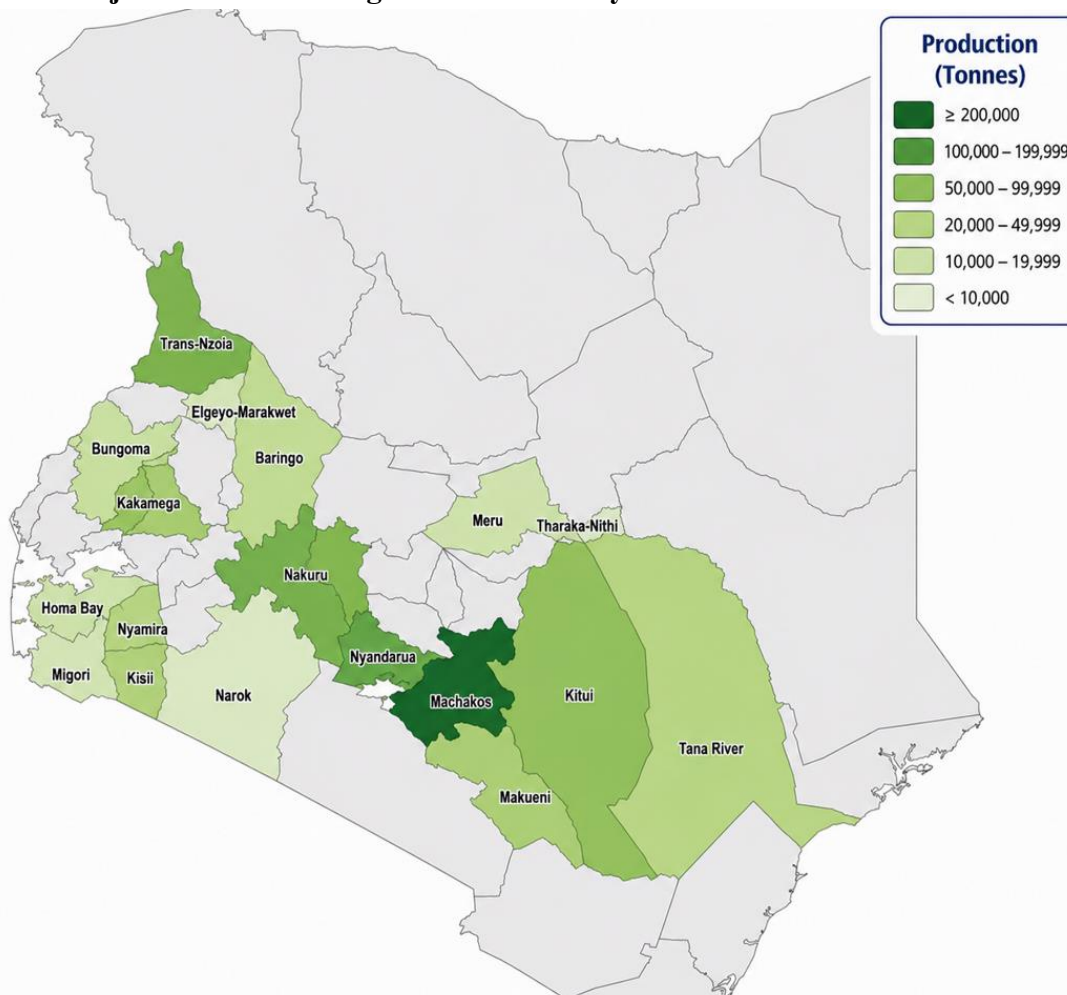
Production

Kenya commercially produces at least seven pulse crops: dry beans (various varieties), mung beans (green grams), pigeon peas (red grams), cowpeas (black-eyed peas), chickpeas (garbanzo beans), lentils, and dry peas. In 2025, dry beans were the country's largest pulse crop, accounting for over 50 percent of total production (666,000 metric tons [MT]), followed by green grams, cowpeas, and pigeon peas. Production of chickpeas and lentils is relatively small domestic and unable to meet domestic consumption requirements, resulting in continued imports.

Rising demand for affordable plant-based protein, lower production costs relative to many cereal crops, and short crop cycles continue to encourage pulse cultivation among smallholder farmers. Pulse production remains concentrated in Kenya's highland and semi-arid regions, where bimodal rainfall supports two cropping seasons annually. Eastern Kenya dominates production of mung beans, pigeon peas, and cowpeas, while the Rift Valley, Western, and Central regions account for most dry bean production. Harvesting generally follows the long rains season (June-August) and the short rains season (January-March), although planting and harvest periods vary by county and seasonal rainfall performance.

In 2025 major pulse producing counties include Machakos which produced 235,328 MT, Nyandarua 178,377 MT, Nakuru 138,576 MT, Trans-Nzoia 118,973 MT, Kitui 75,005 MT, Kakamega 68,894 MT, Makueni 59,059 MT, and Bungoma 52,094 metric tons. Other significant producing counties include Homa Bay, Nyamira, Baringo, Elgeyo-Marakwet, Migori, Kisii, Meru, Tana River, Tharaka-Nithi, and Narok (**see Figure 1**). Production is predominantly undertaken by smallholder farmers under rain-fed conditions, with beans commonly integrated into mixed-cropping systems, particularly alongside maize.

Figure 1: Major Pulse Producing Counties in Kenya in 2025



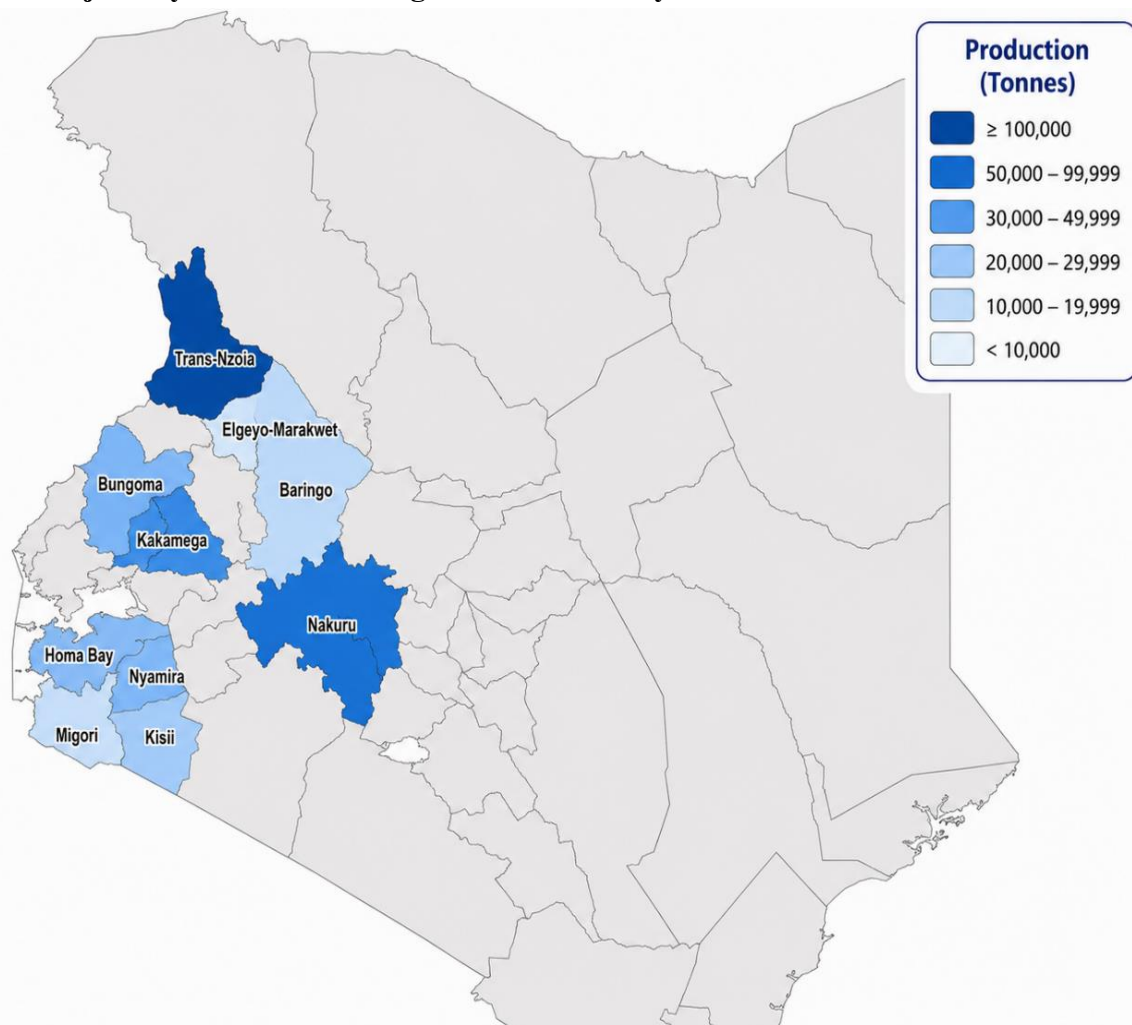
Source: Kenya's Agriculture and Food Authority.

Government and donor-supported programs, including county seed multiplication programs, continue to promote certified seed adoption and extension services. Nevertheless, erratic rainfall, recurring drought, pests and diseases, limited irrigation, inadequate access to quality seed, post-harvest losses, and weak storage infrastructure continue to limit the sector's ability to meet growing domestic demand.

Dry Beans

Dry beans are widely cultivated across Kenya and remain an important pulse crop. Production is concentrated in the western and Rift Valley regions, with Trans-Nzoia, Nakuru, Kakamega, Bungoma, Homa Bay, Nyamira, Baringo, Migori, Elgeyo-Marakwet, and Kisii among the leading producing counties. Trans-Nzoia and Nakuru are the largest producers, accounting for 118,973 MT and 96,842 MT, respectively (**see Figure 2**). Production is predominantly rain-fed and undertaken by smallholder farmers, with beans commonly intercropped with maize. Production levels vary across counties depending on rainfall patterns, agroecological conditions, and seasonal growing conditions.

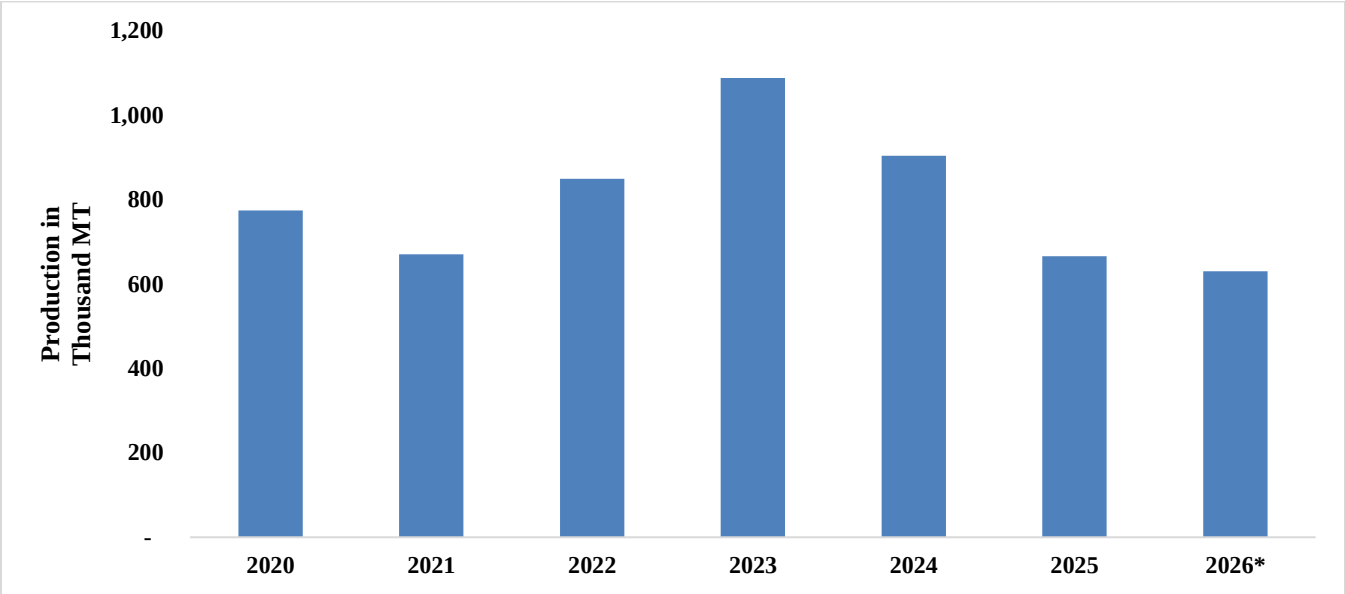
Figure 2: Major Dry Beans Producing Counties in Kenya in 2025



Source: Kenya's Agriculture and Food Authority.

Production fluctuates considerably from year to year depending on rainfall distribution, the incidence of pests and diseases, land size, and access to improved seed. According to Kenya National Bureau of Statistics, dry bean output reached a record 1.09 million metric tons (MT) in 2023 following favorable rainfall, but declined to 904,000 MT in 2024, and is estimated at 666,000 MT in 2025, due to below-average rainfall in several producing regions. Post estimates 2026 production to decline further to 630,000 MT in 2026 due to dry weather conditions that are affecting the North Rift region (**Figure 3**).

Figure 3: Dry Beans Production in Kenya, Calendar Year (CY) 2020-2026



Source: Kenya National Bureau of Statistics, and Post Estimate
2026* Post Estimate

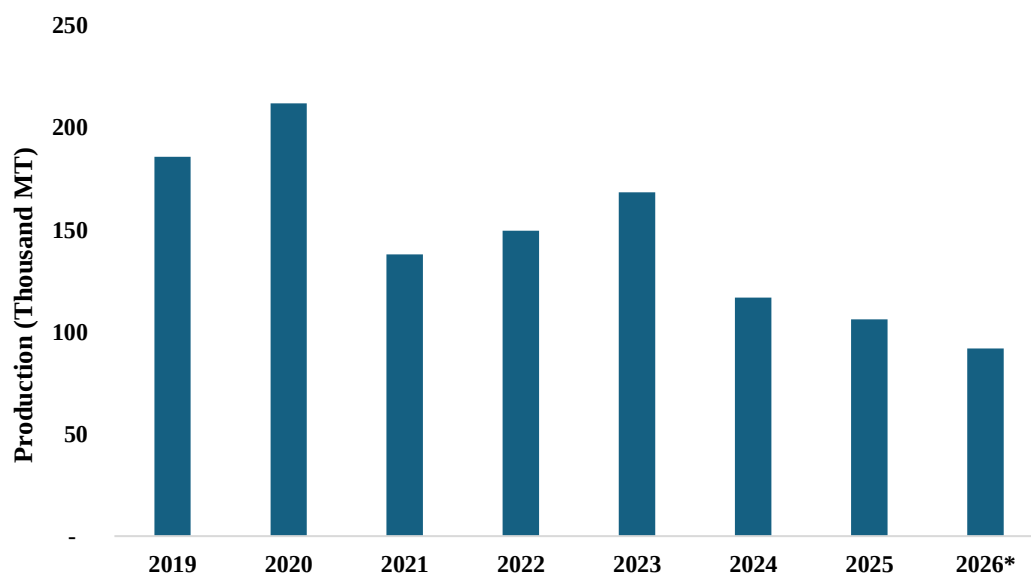
Research institutions, including the Kenya Agricultural and Livestock Research Organization (KALRO), continue to develop improved bean varieties with enhanced drought tolerance, disease resistance, and higher yields. Adoption of certified seed and improved agronomic practices has increased productivity in some production areas, although seed replacement rates among smallholder farmers remain relatively low.

Mung Beans (Green Grams)

Mung beans are Kenya's second-largest pulse crop by commercial importance and are widely cultivated in the country's arid and semi-arid lands (ASALs). Eastern Kenya accounts for most of national output, with harvest periods occurring mainly between June and August and again between January and February. Major producing counties include Kitui, Makueni, Machakos, Tharaka Nithi, Embu, Meru, Tana River, and parts of eastern and coastal Kenya.

The crop is valued for its short maturity period, drought tolerance, and strong export demand. Production peaked at approximately 212,000 MT in 2020, before declining due to erratic rainfall and prolonged drought conditions. In 2025, Kenya produced 106,000 MT of mung beans with Post forecasting 2026 production to decline to approximately 92,000 MT (**Figure 4**). Mung beans remain one of Kenya's leading pulse export commodities, supplying regional markets and international buyers in Asia and the Middle East.

Figure 4: Mung Bean production in Kenya, CY 2019-2026



Source: Kenya National Bureau of Statistics and Post Estimate
2026* Post estimate

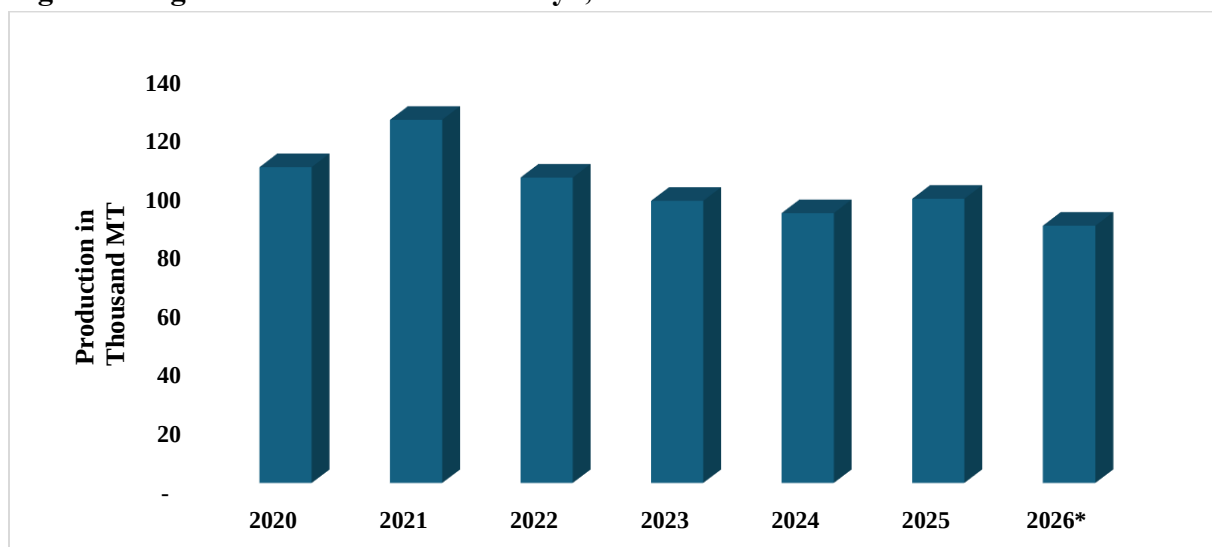
Farmers continue replacing maize with mung beans in marginal rainfall areas because of lower production risks and stronger drought tolerance. The government, through KALRO, continues promoting improved varieties through multiplication and extension programs. Counties continue supporting expansion through agriculture training, certified seed distribution, and soil moisture conservation practices. However, mid-season droughts, anthracnose disease, pod borers, and price volatility during harvest periods continue affecting profitability and yields.

Pigeon Peas

Pigeon peas, commonly known as *Mbaazi*, are primarily produced in the semi-arid eastern counties of Kitui, Makueni, Machakos, Embu, Tharaka Nithi and elsewhere in coastal Kenya. The crop is highly drought tolerant and serves both domestic and export markets. Farmers commonly intercrop pigeon peas with maize and sorghum. Main harvesting occurs between July and September, although late-maturing varieties may extend harvests into October.

Production has gradually declined from 124,000 MT in 2020 to an estimated 88,000 MT in 2025, because of reduced planted area, weather-related production challenges, and fluctuating export demand. Post forecasts 2026 production to slump to 74,000 MT as a result of decreased rainfall (**Figure 5**). Kenya continues to export pigeon peas to neighboring countries and Asian markets, although exports fluctuate depending on production levels and international market conditions.

Figure 5: Pigeon Pea Production in Kenya, CY 2020-2026



**Source: Kenya National Bureau of Statistics and Post Estimate
2026* Post estimate**

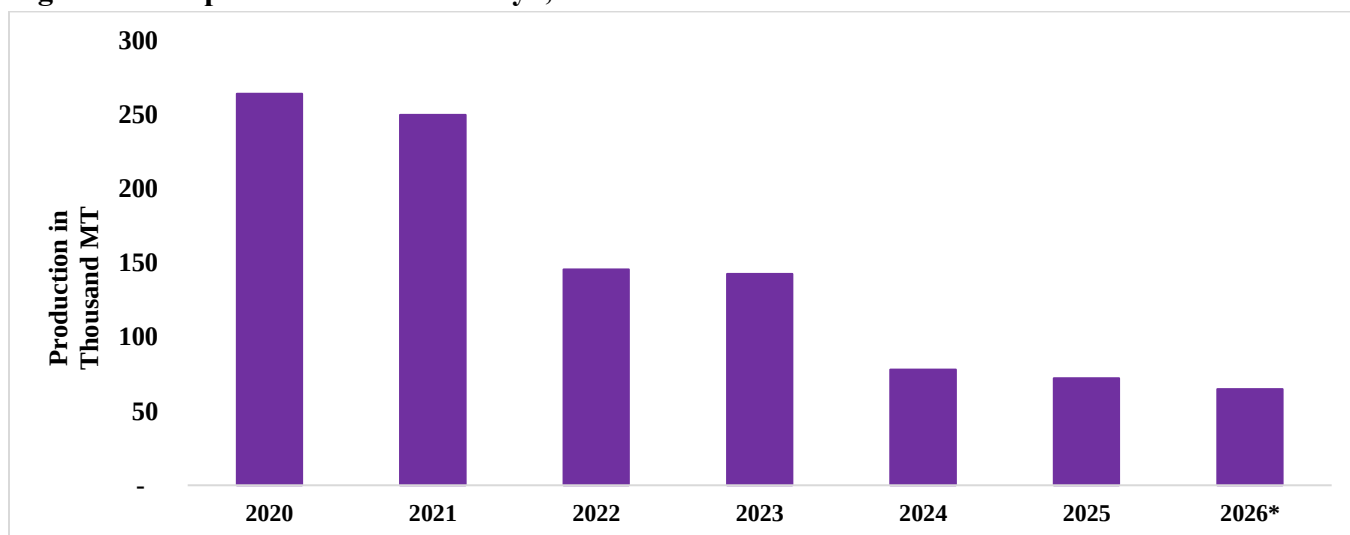
Demand, especially from South Asia, continues supporting commercial production. Farmers in low-rainfall areas increasingly replace maize with pigeon peas because of lower input costs and greater weather resilience. National and county government programs continue promoting adoption of improved varieties, such as *Mituki* and *Mpesa*. Additional expansion has occurred in counties such as Laikipia and Elgeyo Marakwet, as producers adopt drought-tolerant crops. However, erratic rainfall, poor storage systems, and inconsistent export logistics continue constraining production growth.

Cowpeas

Cowpeas are an important food security crop in Kenya's arid and semi-arid regions and are grown for both grain and leafy vegetables. Major producing counties include Kitui, Makueni, Machakos, Taita Taveta, Tana River, Garissa, Turkana, Baringo, and parts of western Kenya.

Following production of over 264,000 MT in 2020, Kenya's output has declined because of prolonged drought and changing rainfall patterns. Kenya produced an estimated 87,500 MT in 2025 and is forecast to decline further to approximately 65,000 MT in 2026 (**Figure 6**). Despite lower production, cowpeas remain an important source of household nutrition and income in the eastern part of the country because of their ability to perform under low-rainfall conditions.

Figure 6: Cowpea Production in Kenya, CY 2020-2026



Source: Kenya National Bureau of Statistics, FAO and Post Estimate
2026* Post estimate

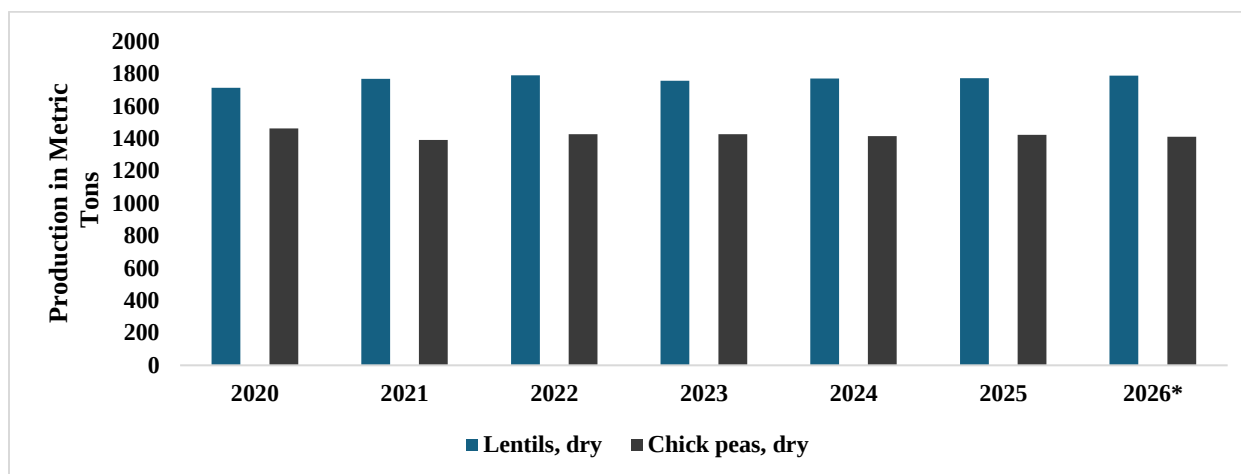
Chickpeas and Lentils

Chickpea production in Kenya remains relatively limited compared to other pulse crops and is concentrated in the cooler highland areas of Nakuru, Narok, Uasin Gishu, Laikipia, Meru, and parts of central Kenya. Both Kabuli and Desi chickpea varieties are cultivated, with Kabuli varieties preferred for domestic consumption and food processing. KALRO and Egerton University are still evaluating some improved chickpea varieties.

Although domestic demand has increased because of changing dietary preferences, urbanization, and the expanding food processing sector, local production remains relatively stagnant at approximately 1,400 MT annually. Consequently, Kenya imports chickpeas to satisfy domestic demand. Excessive rainfall during pod maturity, prolonged dry spells during flowering, and limited seed availability continue constraining production expansion.

Lentil production in Kenya is minimal and is limited to small-scale cultivation in selected highland areas with suitable cool climatic conditions. Annual production has remained relatively low at approximately 1,700 MT over recent years (**Figure 7**). Main harvesting periods occur from July to August following the long rains and from February to March following the short rains.

Figure 7: Chickpea and Lentil Production in Kenya, CY 2020-2026



**Source: Kenya Bureau of Statistics, FAO and Post Estimate
2026* Post estimate**

Domestic production is insufficient to meet consumer demand, particularly in urban centers, the hospitality sector, and among communities where lentils form part of traditional diets. As a result, Kenya relies on imports to supply the domestic market.

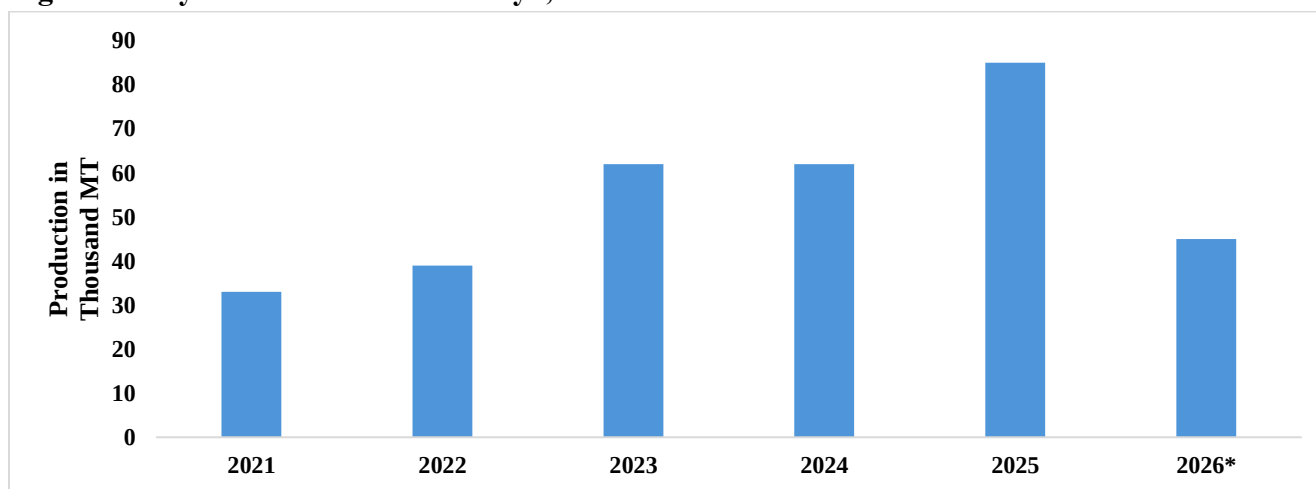
Research and variety adaptation programs under KALRO and the National Expanded Irrigation Program continue supporting lentil production in irrigated areas. However, low farmer awareness, limited availability of adapted seed varieties, and inadequate extension support continue constraining commercial-scale production.

Dry Peas

Dry pea production has expanded in recent years, particularly in the Rift Valley and central highlands, where favorable climatic conditions support cultivation. Production increased from 33,000 MT in 2021 to approximately 85,000 MT in 2025, driven by growing domestic demand and increased interest from processors. Post forecasts 2026 production to decline to 45,000 MT in 2026 because of expected lower planted area and less favorable weather conditions (**Figure 8**).

Although domestic production has grown, Kenya continues to import dry peas to supplement local supplies, particularly for institutional buyers, food processors, and the hospitality industry.

Figure 8: Dry Pea Production in Kenya, CY 2021-2026



Source: Kenya Bureau of Statistics and Post Estimate
2026* Post estimate

Consumption

Kenya's pulse consumption continues to increase because of population growth, rapid urbanization, and rising demand for affordable, protein-rich foods. In 2025, average per capita pulse consumption is estimated at 24.9 kilograms per year, with dry beans accounting for approximately 11.7 kilograms. Dry beans remain the preferred pulse because they are widely available, relatively affordable compared with animal-source proteins, have a long shelf life, and are a part of cultural preferences and traditional diets.

Consumers commonly incorporate pulses into daily meals alongside staple foods such as *ugali* (corn flour paste), rice, *chapati* (wheat flour dough and water, rolled thin, and dry-cooked), and vegetables. They are frequently purchased by households, schools, hospitals, and other institutional feeding programs. Other commonly consumed pulses include mung beans, cowpeas, pigeon peas, chickpeas, and lentils.

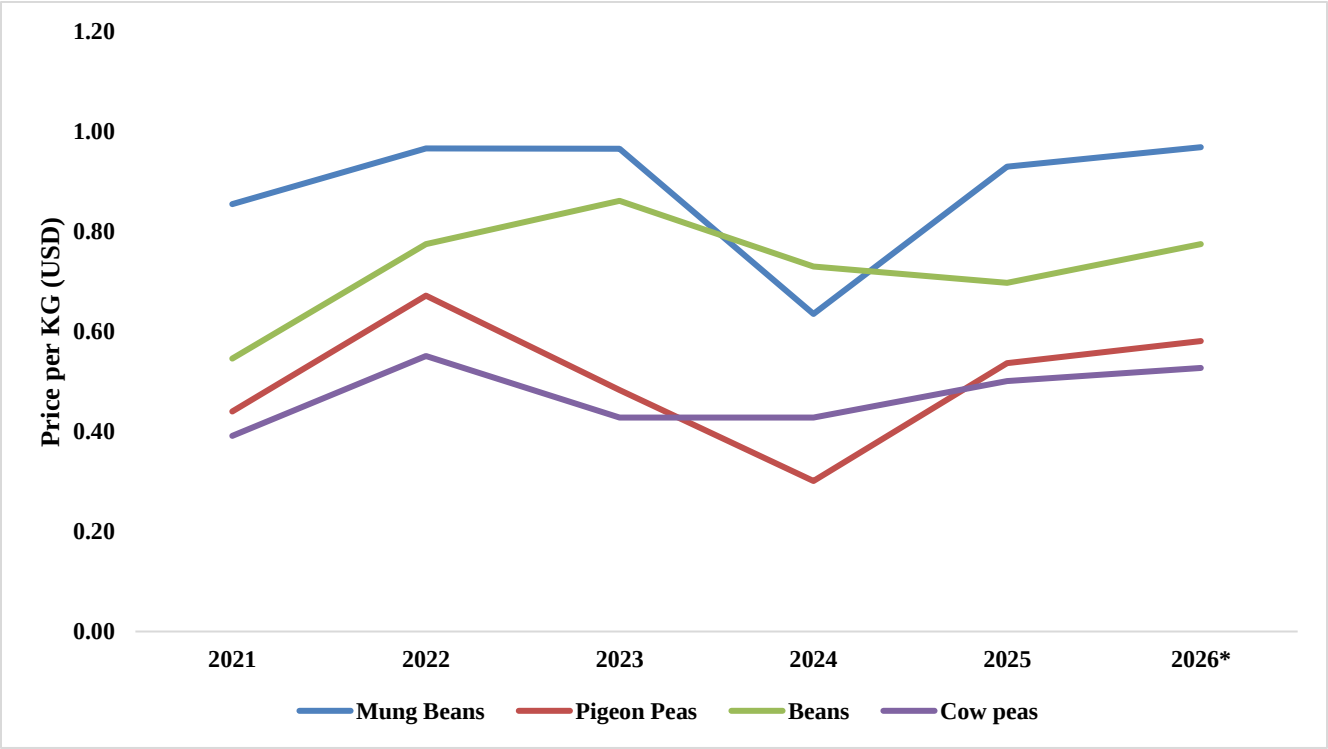
Demand for pulses continues to grow as consumers seek nutritious, lower-cost alternatives to animal protein, while expanding urban markets and changing consumer preferences support increased use of pulse-based products. Food processors are increasingly incorporating pulses into composite flours, canned foods, snacks, and other value-added products, and demand from institutional buyers and regional markets for cleaned, graded, and packaged pulses continues to encourage investment in aggregation and value addition.

In addition to food processing and household consumption, pulses also provide feed ingredients for the livestock sector. Lower-grade pulses and processing by-products are incorporated into livestock feed, while crop residues are commonly used as fodder and as organic soil amendments in mixed crop-livestock production systems.

Government, development partners, and industry initiatives continue to support pulse consumption in Kenya through nutrition, school feeding, and market development programs. The humanitarian interventions by World Food Program incorporate pulses as an affordable source of protein, supporting household nutrition and local demand.

Prices for pulses vary considerably depending on seasonality, crop type, quality, production region, and market channel. Farm-gate prices generally decline during peak harvest periods, due to increased supply and strength during lean seasons when stocks tighten (**Figure 9**). Premium prices are typically recorded for well-graded beans and green grams destined for urban supermarkets, processors, and export markets, while lower quality produced in informal markets attracts lower returns. Prices have also become increasingly volatile in recent years due to fluctuating weather conditions, transportation costs, regional demand shifts, and rising input prices.

Figure 9: Farm Gate Price of Selected Pulses, CY2021-2026



Source: Kenya Bureau of Statistics and Post Estimate
2026* Post estimate

According to industry sources, demand from regional export markets and domestic urban consumers continues to influence price trends across key pulse categories. Beans remain the most widely traded pulse in local markets, while mung beans and pigeon peas often command premium prices during periods of strong export demand.

Investment in the sector remains constrained by limited storage infrastructure, inconsistent supplies of quality raw materials, and inadequate processing technology, which restrict processing efficiency and product diversification.

Trade

Kenya remains a significant importer of pulses to supplement domestic production and meet growing demand from households and food processors. Total pulse imports increased from 95,200 MT in 2021 to a peak of 157,900 MT in 2023, before declining to 90,600 MT in 2024. Kenya imported an estimated 99,400 MT in 2025. The decline from 2023 was a result of increased domestic production in some pulse categories. Imports during January–May 2026 reached 67,900 MT.

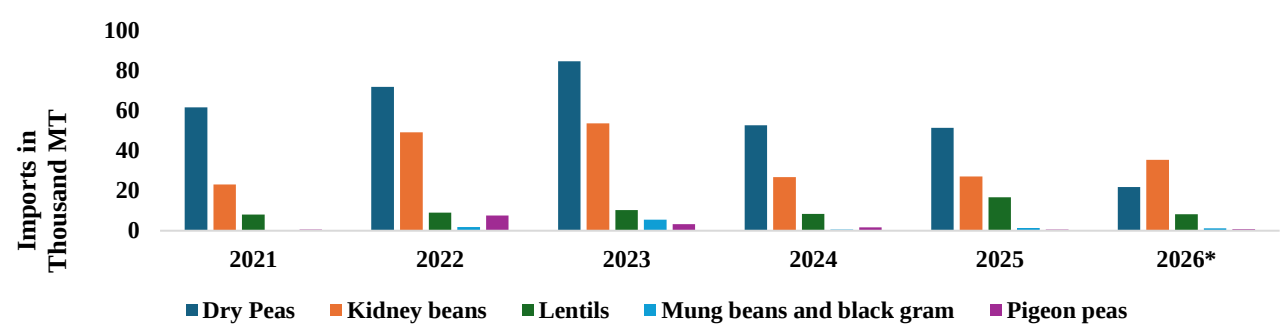
Kidney beans represent the largest imported pulse category by volume, with imports showing significant fluctuations. Imports increased sharply from 23,200 MT in 2021 to 53,700 MT in 2023, before falling to 26,900 MT in 2024 and ticking slightly upward to 27,200 MT in 2025. Kenya imported 35,400 MT of kidney beans during January–May 2026, accounting for about 52.2 percent of total pulse imports during the same period.

Dry peas remain Kenya’s second largest imported pulse commodity, accounting for the largest share of total pulse imports during the review period. Dry pea imports increased from 61,600 MT in 2021 to 84,600 MT in 2023, before declining to 52,600 MT in 2024 and further to 51,400 MT in 2025. During January–May 2026, Kenya imported 21,800 MT of peas, representing approximately 32 percent of total pulse imports during the period. Dry peas are primarily used for household consumption, food processing, and blending with other pulses.

Lentil imports have remained relatively smaller but showed strong growth in 2025. Imports increased from 8,134 MT in 2021 to 10,356 MT in 2023, declined slightly to 8,474 MT in 2024, and rose sharply to 16,748 MT in 2025. During January–May 2026, Kenya imported 8,316 MT of lentils.

Imports of mung beans and black grams (*Vigna radiata* and *Vigna mungo*) remain relatively limited compared with other pulses but have shown increased market interest. Imports rose from 306 MT in 2021 to 5,441 MT in 2023, before declining to 558 MT in 2024 and recovering to 1,374 MT in 2025. Kenya imported 1,200 MT during January–May 2026. These pulses are primarily consumed as green grams (*ndengu*) and specialty pulses, with demand supported by urban consumers and food diversification trends (**Figure 10**).

Figure 10: Top 5 Kenya Pulse Imports, CY2021-2025

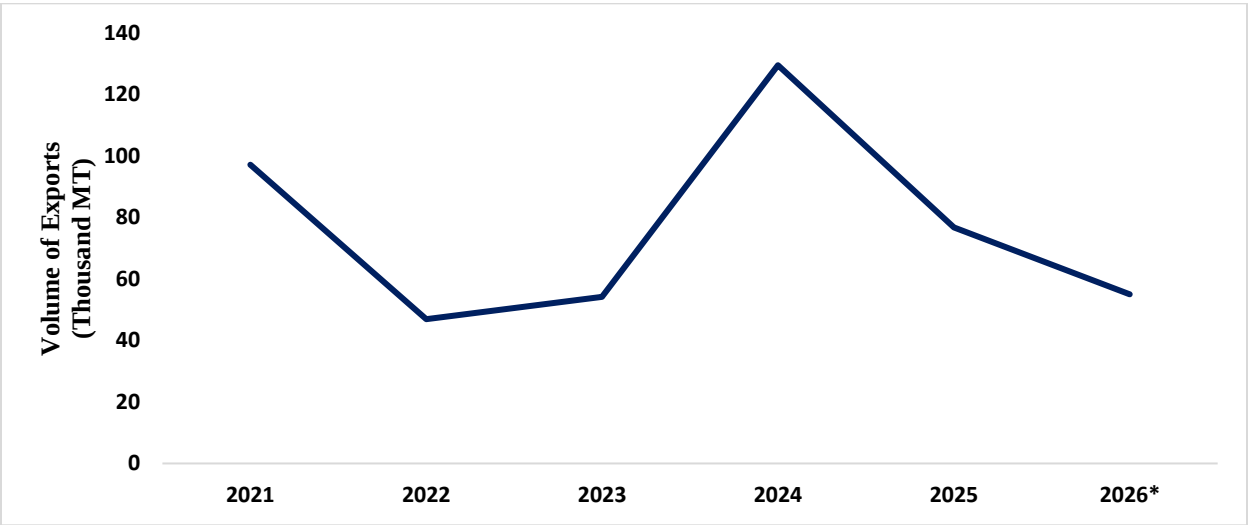


Source: Kenya Bureau of Statistics and Post Estimate
2026* Post estimate

Kenya’s major pulse suppliers include Tanzania, Canada, Ukraine, the United States, and Ethiopia. Tanzania has remained the dominant supplier, increasing its exports from 37,512 MT in 2021 to 52,060 MT in 2025, representing 52 percent of total exports. Canada remains a consistent supplier, with exports reaching 17,527 MT in 2025, up from 10,029 MT in 2024. Ukraine’s exports to Kenya fluctuated significantly, declining from 23,784 MT in 2023 to 5,992 MT in 2024 before recovering to 13,427 MT in 2025. U.S. pulse exports to Kenya increased sharply in 2022, reaching 31,222 MT, making the United States one of the leading suppliers that year, but shipments declined to 7,697 MT in 2025. Ethiopia also expanded its presence in the Kenyan market, with exports rising to 30,330 MT in 2023 before declining to 6,560 MT in 2025.

Kenya's pulse exports fluctuated over the past five years, declining from 97,700 MT in 2021 to 46,900 MT in 2022, before increasing to 54,100 MT in 2023 and reaching a five-year high of 129,400 MT in 2024 (**Figure 11**). Exports declined to 76,700 MT in 2025, and FAS/Nairobi forecasts exports to fall further to 55,000 MT in 2026 as a result of below average rainfall. Pigeon peas, mung beans and black grams (*Vigna radiata* and *Vigna mungo*), and kidney beans are expected to remain Kenya's principal pulse exports.

Figure 11: Kenya Pulse Exports by Volume, 2021-2026



Source: Kenya Bureau of Statistics and Post Estimate
2026* Post estimate

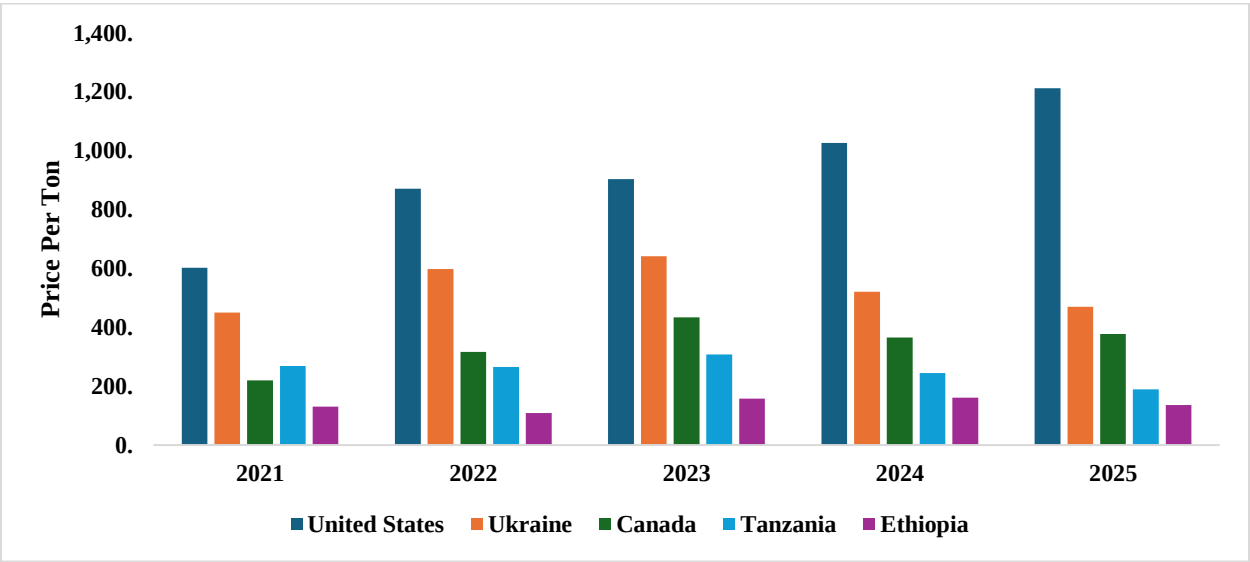
In 2025, India remained the largest export destination, importing 43,900 MT, equivalent to approximately 57 percent of Kenya's total pulse exports. Other major markets included Thailand (7,100 MT), Uganda (5,200 MT), Pakistan (4,470 MT), Indonesia (3,100 MT), the Democratic Republic of the Congo (2,800 MT), and Burundi (1,800 MT). Industry sources indicate that quality standards, moisture

content requirements, and post-harvest handling practices continue to affect Kenya’s competitiveness in international markets.

Opportunities

Kenya's recurring pulse production deficits, driven by erratic rainfall, declining productivity, and rising consumer demand, continue to create opportunities for U.S. pulse exporters. Tanzania, Ethiopia, and Canada remain the country's primary suppliers of dry peas and other pulses due to either geographic proximity, competitive pricing, or both (Figure 12). U.S. exporters may find opportunities in premium-quality dry beans and selected value-added pulse products that meet the needs of food processors, institutional buyers, and retail consumers. While Kenya presents commercial opportunities for U.S. pulses, market access for some commodities remains limited by phytosanitary import requirements. Specifically, imports of whole peas are restricted due to concerns over *Pseudomonas pisi*, while lentil imports are restricted because of concerns regarding darnel weed (*Lolium temulentum*). Split peas are permitted.

Figure 12: Average Price of Pulse Imports to Kenya, USD



Source: Kenya Bureau of Statistics and Post Estimate
2026* Post estimate

Demand for pulse flours, protein concentrates, pulse-based ingredients, and ready-to-use food formulations is expected to increase as Kenya's food processing sector expands. Kenya also serves as a regional humanitarian and logistics hub for East Africa, supplying food assistance to neighboring countries affected by conflict, drought, and displacement. International humanitarian organizations operating in Kenya regularly procure pulses for emergency food assistance and nutrition programs, creating additional commercial opportunities for suppliers capable of meeting quality, food safety, and delivery requirements.

Policy

Kenya permits the commercial importation of dry beans and other pulses to supplement domestic production and stabilize supplies during periods of market shortages. Imports are subject to applicable tariffs under the East African Community (EAC) Common External Tariff and must comply with Kenya's sanitary, phytosanitary, and quality requirements administered by the Kenya Plant Health Inspectorate Service (KEPHIS) and the Kenya Bureau of Standards (KEBS). In 2025, KEPHIS and the U.S. Department of Agriculture's Animal and Plant Health Inspection Service (APHIS) resolved phytosanitary concerns related to *Curtobacterium flaccumfaciens* pv. *flaccumfaciens* (CFF), removing an important technical barrier to U.S. dry bean exports to Kenya. However, market access remains subject to commodity-specific phytosanitary requirements for other pulses from the United States.

Attachments:

No Attachments.