United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** December 04, 2025

Report Number: KE2025-0026

Report Name: Poultry and Products Situation

Country: Kenya

Post: Nairobi

Report Category: Poultry and Products

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Report Highlights:

FAS Nairobi projects Kenya’s chicken meat production to increase by about eight percent in 2025, supported by better access to quality chicks, veterinary inputs, and strong demand. Although feed costs remain high, local feed quality is gradually improving. Population growth, higher incomes, and changing dietary preferences are driving demand in urban areas. The industry remains primarily focused on meeting domestic demand, while export opportunities are constrained by the relatively high production costs, which makes it less competitive in regional and international markets.

Executive Summary

Post estimates Kenya's chicken meat production to rise by 8.2 percent in 2025, reaching approximately 105,000 metric tons (MT), up from 96,937 MT in 2024. The growth is driven by increased investment in the poultry sector, wider availability of high-yielding day-old chicks, and rising demand for poultry meat and products in rapidly growing urban centers. Kenya's population is expanding by about 2.3 percent annually, with urbanization at nearly four percent boosting consumption of poultry meat. The 2024 production recovery followed a near-stagnant 0.3 percent growth in 2023. This growth was supported by improved feed availability and modest gains in consumer purchasing power. However, high feed production costs, limited veterinary services, and inadequate cold chain infrastructure continue to constrain growth, especially among small-scale producers.

In 2025, the poultry sector is expected to benefit from better access to breeding stock, favorable farm-gate prices, and growing interest from medium-scale investors, particularly in peri-urban areas. While domestic consumption is projected to rise, affordability remains a concern for lower-income households due to persistently high input costs. Chicken prices remain elevated domestically because the limited availability of key inputs, especially feed and breeding stock, continues to drive up production costs. Export potential also remains constrained by high prices and limited supply, which reduce Kenya's competitiveness in regional markets.

Production

Kenya's poultry population is estimated at over 72 million birds, of which 79 percent are indigenous varieties, 17 percent are broilers and layers, and two percent are breeding stock. Other species such as turkey, duck, geese, guinea fowl, pigeon, dove, and quail make up about two percent. Indigenous chickens known as Kienyeji chicken **(see Figure 1)** are mostly found in rural areas, while imported breeds of broilers and layers **(see Figure 2**) dominate urban and peri-urban centers. The commercial sector produces over one million chicks weekly, supported by a growing urban population and expanding retail outlets, including fast-food chains, supermarkets, and restaurants. Demand for commercial chicken and eggs remains high and continues to grow.

Figure 1: Indigenous Breeds

Source: FAS Nairobi

Figure 2: Laying Hens in Kenya

Source: FAS Nairobi

Post estimates Kenya's chicken meat production to increase by 8.2 percent in 2025, reaching an estimated 104,921 metric tons up from 96,937 metric tons in 2024. This anticipated growth is supported by improved access to improved day-old chicks and robust demand driven by population growth. Medium-scale producers in peri-urban hubs are increasingly capitalizing on attractive farm-gate prices. While domestic consumption is expected to grow steadily, elevated input costs, especially for feed and veterinary services, continue to limit affordability for lower-income households.

In 2024, poultry output increased modestly following a sluggish 2023, because of stable feed-grain supplies and increased capital flows from vertically integrated producers. However, cost pressures persisted, with day-old chick prices rising by more than 10 percent year-on-year, largely due to constrained breeder stock availability and heightened demand. Imports of day-old chicks increased from $7.1 million in 2023 to $10 million in 2024. After plunging to $2.1 million in 2021 due to COVID-19 disruptions, import values surged to $18.3 million in 2022, before declining by 61 percent in 2023 with an ease in travel restriction.

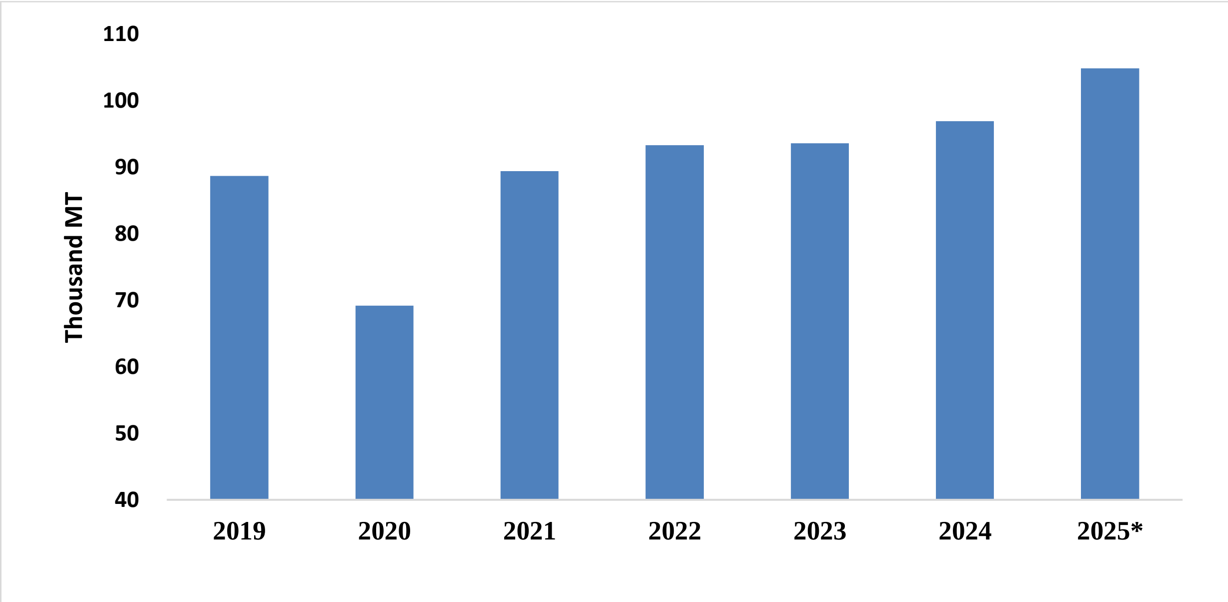
Imports of fertilized eggs for incubation have been increasing at a compound annual growth rate of about 23 percent in value since 2020, reflecting continued reliance on imported hatchery inputs alongside gradual improvements in domestic hatchery capacity. While feed prices only increased marginally, many smallholders continued to face high production costs and limited access to veterinary and extension services. Larger integrated firms benefited from economies of scale, but persistent challenges such as inconsistent supply of key inputs, weak regulatory oversight, and logistics inefficiencies continue to constrain the growth of the poultry sector.

Consumption

Demand for poultry products including whole, half, parts, grilled and fried chicken, and eggs is increasing in Kenya due in part to population growth of 1.8 percent per annum. Rapid urbanization, a growing middle class, increasing disposable income, and growing distribution chains have also led to an increase in consumption of poultry and poultry products.

In 2020, poultry meat consumption dropped by 21.9 percent to 69,212 MT, mirroring the three percent GDP contraction caused by COVID-19–related supply disruptions that lowered household disposable incomes. In 2021, poultry consumption surged by 29.2 percent to 89,450.06 MT, driven by 4.2 percent economic growth and increased mobility following the easing of COVID-19 restrictions. The following year, growth slowed to 4.3 percent, with consumption reaching 93,340 MT, broadly aligned with 4.8 percent GDP expansion. However, elevated inflation of 7.9 percent eroded household purchasing power, making poultry meat consumption less affordable, particularly for lower-income groups. **(see Figure 3 and Figure 4).**

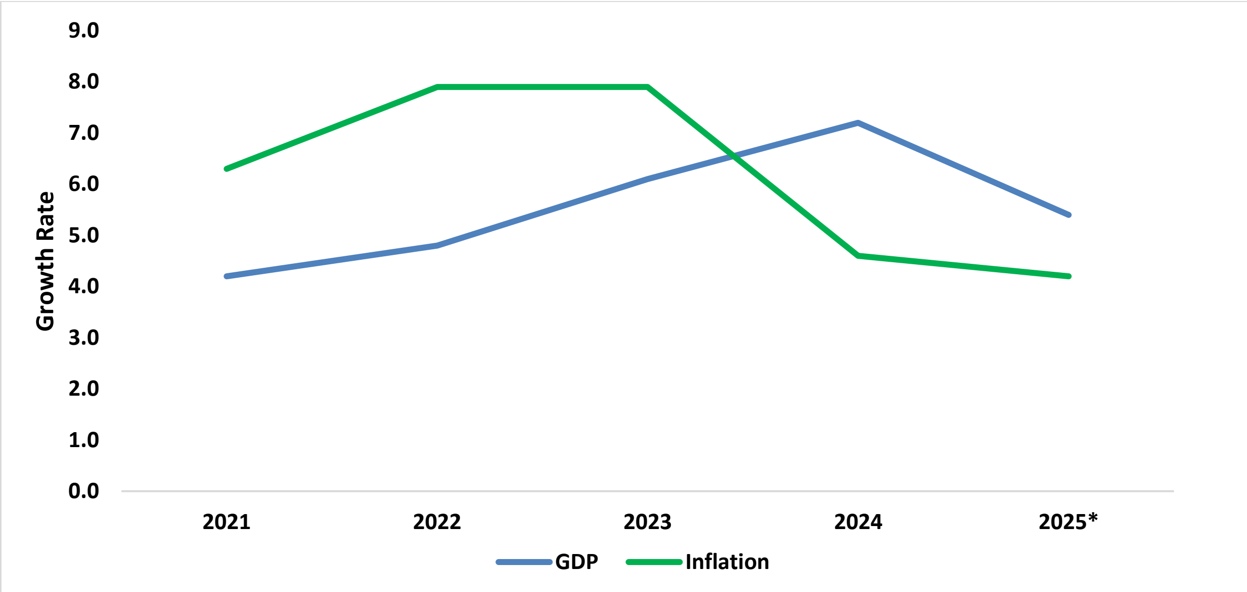
Figure 3: Kenya's Annual Chicken Meat Consumption



***2025 Post estimate**
Source: Kenya National Bureau of Statistics and Post Estimate

In 2023, GDP grew by 6.1 percent, but high inflation of 7.9 percent limited consumer spending and raised production costs, especially for feed. Even so, consumption rose slightly by 0.3 percent to 93,622 metric tons. In 2024, stronger GDP growth of 4.7 percent and a drop in inflation to 4.6 percent boosted real income and purchasing power, driving consumption up by 3.5 percent to 96,937 metric tons. Looking ahead, with GDP expected to grow by 5.4 percent and inflation remaining low, consumption in 2025 is projected to rise by 8.2 percent to 104,921 metric tons.

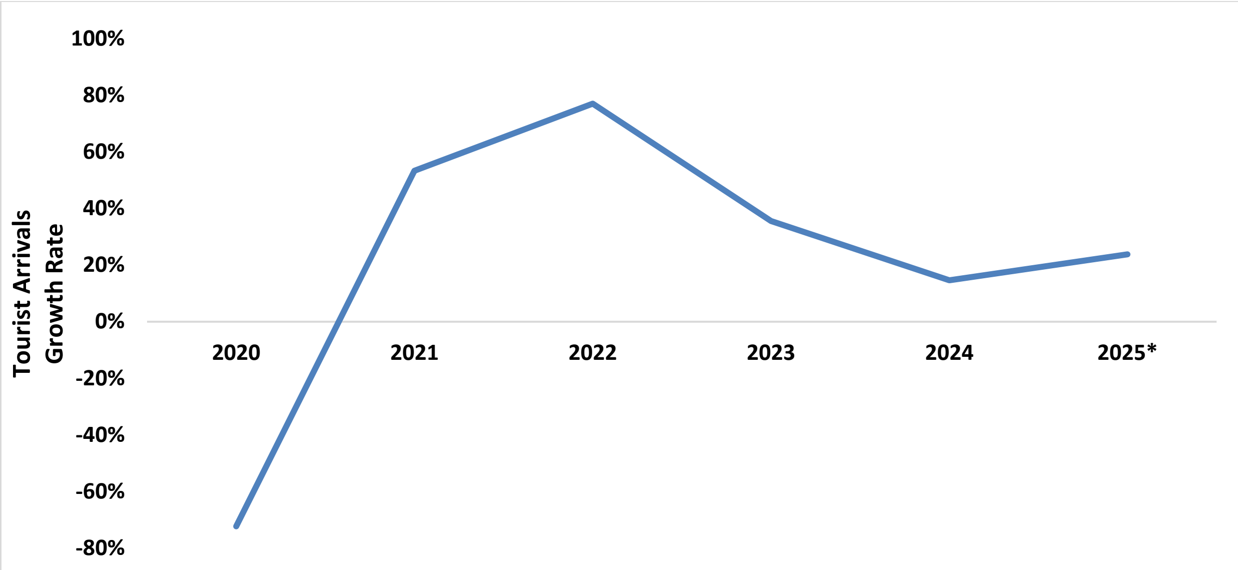
Figure 4: Growth in GDP and Inflation Rate



Source: Kenya National Bureau of Statistics
***2025 KNBS estimate and Post estimate**

Tourism, an important driver of restaurant and high-end meat consumption fluctuated between 2020 and 2024, with the Kenya Tourism Board reporting roughly 2.39 million international arrivals in 2024 and growth in both visitor days and tourism receipts, which lifted demand in the accommodation and food service sectors. Nevertheless, per capita tourist food spending grew more slowly than arrivals, as travelers shifted a greater share of their budgets toward accommodation and experiences rather than food **(see Figure 5).**

Figure 5: Tourism Arrival in Kenya



Source: Kenya Tourism Board

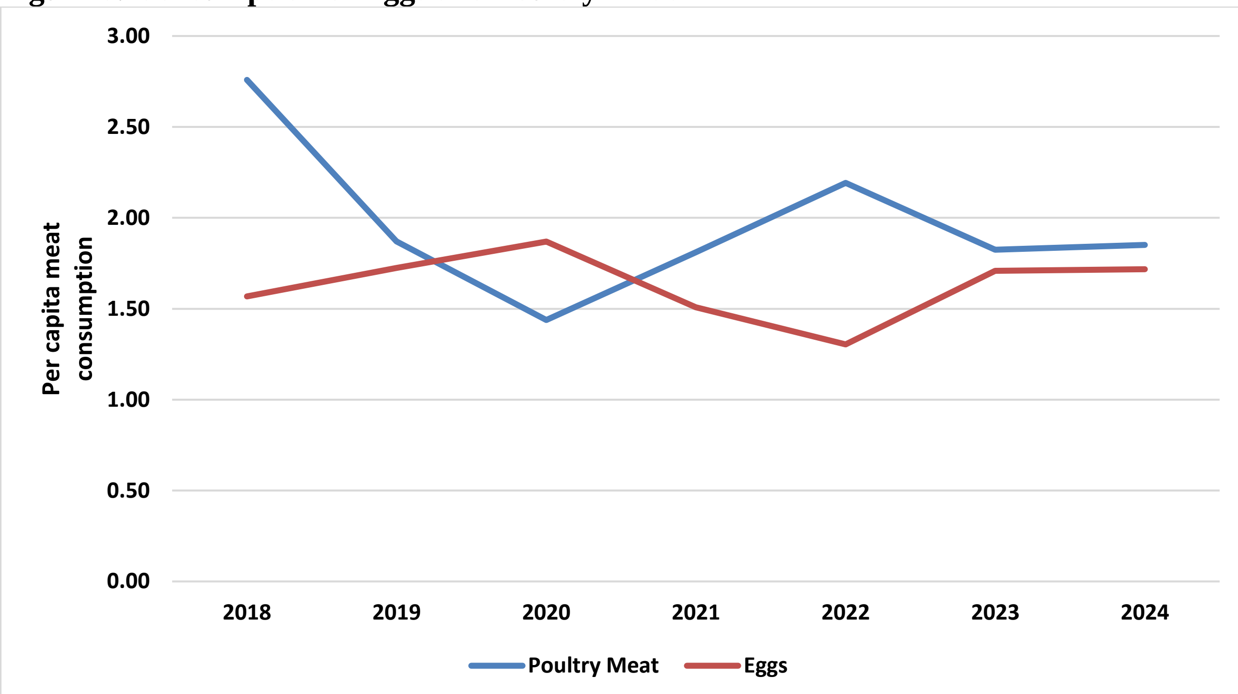
Per Capita Poultry Meat and Egg Consumption

Poultry meat consumption remained stable from 2018–2024. In 2018, per capita consumption stood at 2.76 kilograms, but dropped to 1.87kg in 2019, a sharp decline of 32.2 percent, and further to 1.44kg in 2020, representing another 23.0 percent drop. This deceleration of almost 48 percent in two years was driven by rising production costs, particularly in feed prices, coupled with weakened consumer incomes.

The period between 2021 and 2022 marked a strong rebound, with consumption rising from 1.81kg in 2021 (25.7 percent growth) to 2.19kg in 2022 (21 percent increase), supported by economic recovery, stronger household demand, and a resurgence in the hospitality sector as COVID-19 restrictions eased. Nevertheless, this growth was not sustained, as consumption slipped back to 1.82kg in 2023, before improving by 1.85kg in 2024, a modest 1.6 percent growth.

On the other hand, egg per capita consumption rose steadily from 1.57kg per person in 2018 to 1.72kg in 2019, an increase of about 9.6 percent, and further to 1.87kg in 2020, representing another 8.7 percent growth. However, this trend reversed in 2021, when consumption fell to 1.51kg, a 19.3 percent decline, followed by a sharper drop to 1.30kg in 2022, equivalent to a 13.9 percent decrease. The downturn coincided with the effects of the COVID-19 pandemic, which strained household purchasing power and disrupted feed and production systems. From 2023 onwards, recovery was evident, with consumption increasing from 1.71kg in 2023 to 1.72kg in 2024, a marginal 0.6 percent growth, pointing to gradual stabilization of both demand and supply and also growth in the purchasing power **(see Figure 6).**

Figure 6: Consumption of Eggs and Poultry Meat



Source: Kenya National Bureau of Statistics

Poultry Feed

Despite rising feed prices, retail chicken prices in Kenya increased by a smaller margin throughout 2024. Feed costs increased by approximately 37 percent over the past four years, putting pressure on broiler producers who have turned to homemade feed formulations to manage expenses.

According to industry experts, Kenya's compound feed industry has an annual production capacity of approximately 1.6 million MT, with current production operating at about 40–60 percent of total capacity, equivalent to 700,000–800,000 metric tons per year. Poultry feed accounts for about 41 percent of total output, dairy feed 39 percent, pork feed 13 percent, and the remaining share serves other livestock species. The sector is highly fragmented, with 307 registered feed mills, 90 percent of which are small-scale. However, a few large firms dominate the market: the two biggest producers supply more than half of all poultry feed, while the top four account for about 75 percent, according to the Competition Authority of Kenya.

One of the key challenges facing industry is the high cost of animal feed, which has risen sharply in recent years. Between 2020 and 2025, feed prices increased by more than 37 percent. The price of a 50-kg bag of layer mash rose from about $14 in 2020 to $32 in 2024, driven by limited supply of corn and soybean meal, coupled with import restrictions and low domestic production of key feed ingredients. Industry contacts report that as much as 82 percent of the cost of chicken meat is attributed to feed costs.

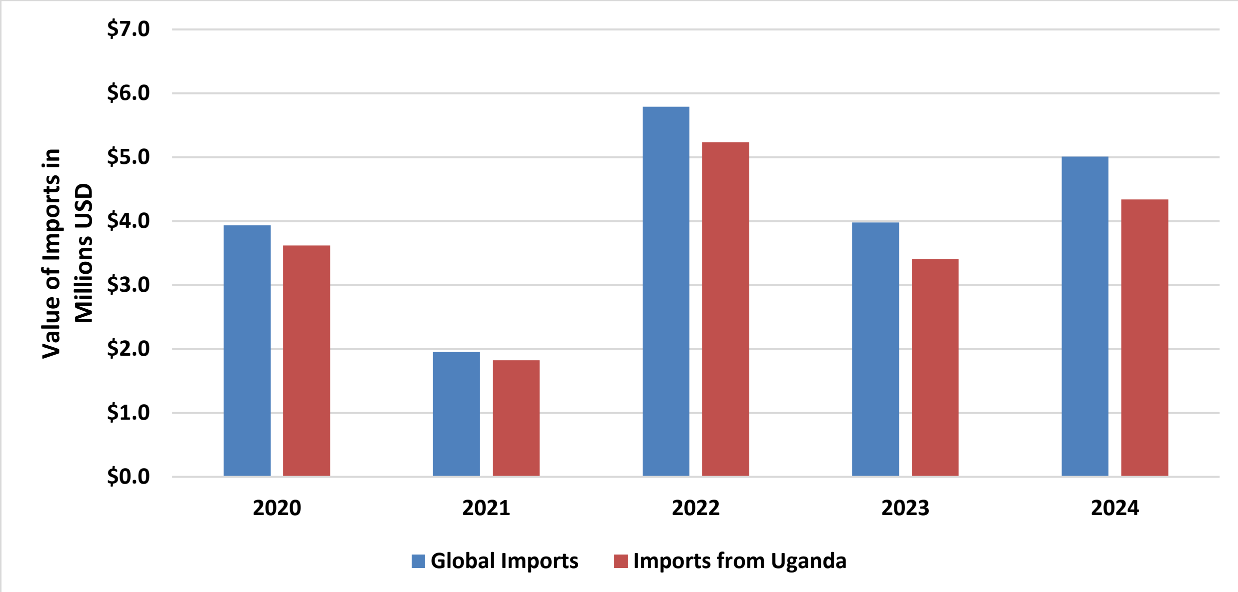
In addition, Kenya meets about 40 percent of its estimated annual feed demand with nearly 46 percent of harvested grain lost post-harvest. Grains by-products such as bran and pollard are also often exported regionally, further tightening local supply.

Poultry feeds in Kenya are corn-based rations, often with 50–70 percent corn or sorghum, supplemented by protein sources. Common protein ingredients include soybean meal, sunflower, and cottonseed cake.

Trade

Kenya's poultry meat and products imports (excluding eggs) were marked by sharp fluctuations between 2020 and 2024. Total imports were valued at $3.93 million in 2020, declined to $1.96 million in 2021, peaked at $5.79 million in 2022, dropped again to $3.98 million in 2023, and later recovered to $5.01 million in 2024. Imports were largely dominated by Uganda, whose share consistently represented the bulk of imports, rising to $5.24 million in 2022 before falling to $3.41 million in 2023 and recovering to $4.34 million in 2024. The declines in 2021 and 2023 were largely driven by tighter supply conditions, disruptions in cross-border trade as a result of COVID-19 containment measures, and stricter import regulations in Kenya. Overall, the volatility in imports was influenced by shifts in regional supply availability, changing trade policies, and varying domestic demand pressures **(see Figure 7).**

Figure 7: Kenya Poultry Meat & Products Imports (Ex. Eggs)



Source: Trade Monitor LLC

Policy

The Kenyan government is currently reviewing its national livestock policy. Some policies under consideration cover issues on farm animal genetic resources, livestock feed and nutrition, inputs, animal diseases and pests, livestock marketing, research and agricultural extensions, and food security. The government is also considering the Livestock Bill of 2019 which seeks to promote development, promotion, regulation, and research in all aspects of livestock. The bill looks at the production, rearing of poultry, promotion of poultry keeping, and the production of poultry products.

Attachments:

No Attachments.