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Report Highlights:

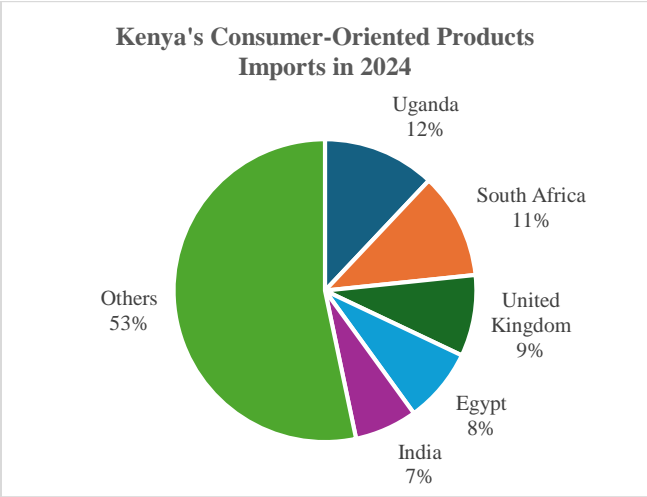
In 2024, Kenya's imports of agricultural and related products amounted to \$3.59 billion, of which 13 percent comprised consumer-oriented food products. The country's increasing urbanization, rapidly expanding population, growing middle class, and the development of modern food retail and food service sectors collectively create significant opportunities for U.S. exporters. The leading consumer-oriented product prospects, based on the value of imports in 2024, include soups and other food preparations, dairy products, distilled spirits, bakery goods, cereals and pasta, as well as wine and related products.

Executive Summary:

Kenya is East Africa’s economic powerhouse, with a strong financial sector and a relatively well-developed logistics network, making it a regional hub. As a net importer of agricultural products, agricultural and related product exports to Kenya reached \$3.59 billion in 2024. Kenya’s fast-growing population, growing middle class, urbanization, and expanding food service and retail sectors offer many opportunities for U.S. exporters.

Consumer-Oriented Agricultural Imports

Kenya imported \$475 million high value consumer-oriented agricultural products in 2024. Uganda, South Africa, United Kingdom, Egypt, and India were the major suppliers, with the United States providing 2 percent of total imports.



Food Retail Industry:

Kenya’s retail landscape is a mix of traditional, informal retailers and modern grocery channels which stock most imported consumer-oriented high value products. Grocery retail sales grew by 16.3 percent in 2024 to reach \$9.3 billion and are expected to grow at 10 percent from 2022 to 2027, according to Euromonitor International. Growth in e-commerce and increased urbanization drive growth in the formal retail sector. Kenya’s ecommerce sector has prompted most retailers to strategically partner with online delivery firms like Glovo, UberEats, and Bolt Food.

Food Processing Industry:

Kenya’s manufacturing sector grew by 2.8 percent in 2024, compared to 2.2 percent in 2023, contributing 7.3 percent to GDP. Agro-based industries recorded a growth of 9.8 percent, largely driven by a rebound of sugar and corn production. Growth in beverage production (15.6%), milk processing (11.8%), coffee (7.8%), and tea (4.9%) expanded the food processing sector by 4.6 percent in 2024.

Food Service Industry:

Kenya’s food service sector plays a crucial role in the hospitality industry. Kenya has over 3,800 restaurants as of January 2024. The sector is thriving, supported by a robust food and beverage market, expanding tourism, and evolving consumer preferences.

Quick Facts CY 2024

Imports of Consumer-Oriented Products (US \$475 million)

List of Top 10 Growth Products in Kenya

- 1) Meat products
- 2) Pork and pork products
- 3) Egg and egg products
- 4) Coffee, roasted and extracts
- 5) Nursery products and cut flowers
- 6) Condiments and sauces
- 7) Tree nuts
- 8) Chewing gum and candy
- 9) Fruit and vegetable juices
- 10) Spices

Food Industry by Channels (US\$)

Retail Food Industry (Modern Groceries)	\$12 billion
Food Service	\$300 million
Food Processing	\$9.0 billion
Food and Agriculture Exports	\$4.3 billion

Top Formal Food Retail Chains in Kenya (number of stores)

- 1) Naivas (108)
- 2) Quickmart (61)
- 3) Chandarana FoodPlus (27)
- 4) Carrefour (28)
- 5) Maguna’s (24)
- 6) Cleanshelf (15)
- 7) Eastmatt (11)
- 8) Maathai (11)

GDP/Population in 2024

Population (millions): 52.4 million (Estimate)
GDP (Nominal): \$120.34 billion
GDP per capita (ppp): \$6,601

Data Sources: Trade Data Monitor , LLC, Kenya Economic Survey 2025, Euromonitor International (2024), IMF Data

Strengths	Weaknesses
Dynamic, market-based economy. Rapidly expanding online retail sector.	Price-based purchasing decisions. High shipping costs for U.S. exporters.
Opportunities	Threats
Regional hub for seven East Africa countries. Local importers, distributors, and consumers, have a limited awareness of U.S. food products.	Strong competition from European countries, regional countries, South Africa, India, and the local industry.

Section I: Market Overview

Advantages	Challenges
Kenya's strategic location in East Africa makes it a regional trade hub for East and Central Africa.	U.S. suppliers face stiff competition from suppliers in Uganda, South Africa, Egypt, India, and Europe due to geographical advantages.
U.S. food products are associated with premium quality and have a positive image in the Kenya and East African market.	Kenyan consumers, importers, retailers, and processors have limited awareness and knowledge of U.S. agricultural and food products.
Kenya has a vibrant and diversified private sector. Consumer spending is expected to increase due to rising incomes.	Most Kenyan buyers are price sensitive.
Kenya has an expanding modern food retail sector, food service sector, and food processing sector.	European vendors benefit from strong historical ties.
An emerging eating-out culture in Kenya's middle class is driving growth in fast food outlets, restaurants, and coffee shops.	Exporters face competition from locally produced goods through the Government of Kenya's "Buy Kenya, Build Kenya" campaign.
Kenya has internet access rates at nearly 80 percent and a growing e-commerce sector. The spread of broadband internet and e-commerce alongside deeper financial inclusion will create new market opportunities.	East African Community (EAC) and Common Market for Eastern and Southern Africa (COMESA) member states have a preferential tariff advantage.

The following table summarizes Kenya's economic trends:

Table 1: Economic Trends

Economic Trends	2020	2021	2022	2023	2024	2025^E	2026^F
Population (million) ²	52.2	53.2	54.3	55.3	56.4	57.5	58.6
Formal Sector Employment (million) ¹	2.9	3.1	3.2	3.3	3.4	3.5	3.6
Informal Sector Employment (million) ¹	14.5	15.3	16.0	16.7	17.4	18.0	19.0
Public Sector Employment ('000s) ¹	884.6	923.1	938	993	999	1,055	1,088
Nominal Gross Domestic Product (GDP) (in billion US\$) ²	100.66	109.71	114.45	107.50	120.34	136.08	143.94
GDP per capita (US\$ at PPP) ²	4,793	5,339	5,883	6,276	6,601	7,047	7,488
Real GDP growth rate (%) ¹	(0.3)	7.6	4.9	5.7	4.7	5.0	5.4
Inflation (% change) ¹	5.3	6.1	7.6	7.7	4.5	4.5	5.5
Exchange Rate Kshs: US\$(end-period average) ¹	106.50	109.70	117.90	139.90	134.82	130.44	136.70

Sources: ¹Economic Survey, 2025; ²Economist Intelligent Unit; and ^{E, F}FAS/Nairobi estimates and forecasts

Kenya's population is forecast to grow at an average annual rate of 2.2 percent between 2022 and 2025 and reach 60 million by 2025, according to the Economist Intelligence Unit (EIU). In 2024, the real gross domestic product (GDP) grew by 4.7 percent, a slowdown from 5.7 percent growth in 2023. The growth was notable across several sectors of the economy, including agriculture, forestry, and fisheries which registered a growth of 4.6 percent, attributed to favorable weather conditions. Kenya's economy is projected to remain resilient in 2025 and beyond mainly supported by structural reforms, a vibrant services sector, broad based digitization, and deeper regional integration.

Key Demographics

Kenya's rising urban population remains a large and fast-growing consumer market for high-value consumer-oriented foods. According to the World Bank, Kenya's urban population is growing at an annual average rate of 3.7 percent against a global average of 1.9 percent. Nairobi is the country's political, economic, and financial center, with an estimated population of 5 million. Nairobi's high concentration of consumers, combined with the city's commercial power, makes it Kenya's most important market, followed by Mombasa, Kisumu, Nakuru, and Eldoret.

The following table summarizes Kenya's urban population by age groups, 2020-2026.

Table 2: Urban Population by age group, 2020-2026

	2020	2021	2022	2023	2024	2025 ^E	2026 ^F
Urban population (million)	14.6	15.2	15.7	16.3	17.0	18.0	19.0
Urban population (%)	28.0	28.5	29.0	29.5	30.0	30.5	31.0
Population aged 0-14 (%)	39.3	38.7	38.1	37.4	36.8	37.0	37.5
Population aged 15-64 (%)	58.9	58.5	59.1	59.6	60.2	60.7	60.8
Population aged 65+ (%)	2.8	2.8	2.9	2.9	3.0	3.0	3.1
Male population (%)	49.8	49.7	49.7	49.7	49.7	49.7	49.7
Female population (%)	50.2	50.3	50.3	50.3	50.3	50.3	50.3
Life expectancy male (years)	59.1	59.0	61.3	61.5	61.6	61.7	61.8
Life expectancy female (years)	64.2	63.6	65.9	65.9	66.1	66.2	66.3

Sources: Euromonitor International, 2025, ^E, ^FFAS/Nairobi estimates and forecasts

Section II: Exporter Business Tips

Local Business Customs and Trends

In general, Kenyan business executives are relatively informal and open. The use of first names during early stages of business relationships is acceptable. Friendship and mutual trust are highly valued. Once trust is earned, a productive working relationship can be expected.

Business gifts are not common, but business entertainment such as lunches, golf, and cocktails are common courtesies during major deals and agreements. Kenyan businessmen appreciate quality and service and are ready to pay extra if convinced of a product's overall superiority. Kenya is a value market, but still price sensitive. As a result, businesses must ensure timely delivery dates and honor quality after-sales service. A U.S. exporter should allow for additional shipping time to Kenya and continuously update the buyer on changes in shipping schedules and routing. It is better to quote a later delivery date that is guaranteed than an earlier one that is uncertain. Since Kenyan importers generally do a lower volume of business, U.S. exporters should be ready to offer smaller shipments.

U.S. exporters should maintain a close relationship with their importer to exchange information and ideas. Importers can serve as a good source of market information and as an appraiser of product market acceptance. In most instances, email and/or telephone calls are enough to complete a transaction. However, periodic personal visits keep exporters apprised of new developments and help in quickly resolving problems. Sustained promotion is needed to launch new products.

General Consumer Tastes, Preferences, and Trends

Kenyan high-end consumer tastes have become more sophisticated and demand quality and exceptional service. They also more frequently make purchasing decisions based on brand awareness.

Kenyan food retailers stock a wide range of products to meet consumer tastes and preferences. Consumers cannot always depend on an imported brand to be available in supermarkets and must be flexible to stock products they like or try similar products. Many U.S. brands are available in the Kenyan marketplace, even though the product may have been produced outside the United States and with non-U.S. food ingredients. Private label brands that use 100 percent U.S. ingredients such as the 'American Garden', and 'American Gourmet' brands have penetrated Kenya's retail sector and have significant market share in certain food categories like peanut butter, sauces, and condiments.

Section III: Import Food Standards, Regulations and Procedures

The main regulatory agencies for imported food products include the Kenya Bureau of Standards (KEBS), the Kenya Plant Health Inspectorate Service (KEPHIS), the National Biosafety Authority (NBA), the Department of Veterinary Services (DVS), and the Department of Public Health (DPH). More information is available in the 2025 FAIRS Country Report.

General Import and Inspection Procedures (*Customs clearance*)

A Certificate of Conformity (CoC) is required for most food exports to Kenya. To obtain a CoC, an imported product must satisfy Kenya's import requirements, evaluated by a KEBS contracted pre-export verification of conformity (PVoC) agent. Imports from the United States are inspected and certified by the Société Générale of Surveillance (SGS). The importer must present the CoC to KEBS for clearance of imported goods, and to receive an Import Standardization Mark (ISM), a stick-on-label to be affixed

to each retail item imported. Goods arriving at the port without a CoC are subject to inspection at a fee equivalent to 5 percent of the approved custom value.

Country Language Labeling Requirements

Labels must use English and/or Swahili. Combining English with other languages is permitted.

The Government of Kenya has implemented mandatory labeling of all food containing or derived from genetically engineered products.

More information is available at: [2025 FAIRS Country Report](#).

Tariffs and Free Trade Agreements

Kenya generally follows the common external tariffs (CET) of the East African Community (EAC). The CET is one of the key instruments under the EAC Customs Union which promotes regional integration through uniform treatment of goods imported from third countries.

Effective July 1, 2022, the EAC raised the CET for several agricultural products to 35 percent, including edible oils, beverages, and spirits. For several products designated as “sensitive,” the EAC applies tariffs above 35 percent including milk and dairy products (60 percent), corn (50 percent), rice (75 percent), wheat flour (60 percent), and sugar (100 percent). The full EAC tariff book is available at: [EAC Common External Tariff Book](#).

In addition to tariffs, there are additional charges including a 2.5 percent Import Declaration Fee (IDF) for all imported goods (reduced to 1.5 percent for raw materials and intermediate goods), a 2.0 percent Railway Development Levy (RDL), and a Value Added Tax (VAT) of 16 percent charged on Cost, Insurance, and Freight (CIF) value.

Kenya is an active player in Africa’s economic integration initiatives. Kenya and Ghana were the first countries to ratify and deposit instruments of ratification for the African Continental Free Trade Agreement (AfCFTA). In June 2022, Kenya was designated as one of seven countries to pilot the AfCFTA rollout. In August 2022, Kenya released its AfCFTA implementation strategy (2022 -2027) with the goal of consolidating, diversifying, and expanding exports to African markets.

In December 2020, Kenya signed a free trade agreement with the United Kingdom which went into effect in January 2021. Additionally, Kenya participates in two regional economic blocks that lower tariffs between members. Kenya is a member of the EAC, and COMESA.

Documents Generally Required by the Government of Kenya for Imported Food Products

Pre-Shipment Documents

- Plant Import Permit (PIP) for bulk commodities issued by the Kenya Plant Health Inspectorate Service (KEPHIS)
- Import Declaration Form (IDF) issued by the Kenya Revenue Authority (KRA)
- Certificate of Conformity (CoC)

Post-Shipment Documents

- Phytosanitary Certificate (PC) containing required additional declarations for bulk commodities (corn, wheat, pulses, rice, sorghum, barley, etc.).
- Bill of Lading (three original bills plus non-negotiable copies)
- Commercial Invoice
- Packing List
- Customs Entry Form
- Certificate of Origin
- Health Certificates (Cleanliness, Weight, and Quality)
- Insurance Certificate

Other Documents That May Be Required:

- Fumigation Certificate
- Radiation Certificate
- Noxious Weed Certificate
- Free from Karnal Bunt Certificate

Find more in the [2025 FAIRS Export Certificate Report](#).

Trademark and Patent Protection

Kenya, a member of the World Intellectual Property Organization (WIPO) since 1971, has four intellectual property protection bodies: the Kenya Industrial Property Institute (KIPI), the Kenya Copyright Board (KECOBO), Kenya Plant Health Inspectorate Services (KEPHIS) and the Anti-Counterfeit Agency (ACA). KIPI, established in 2002 is the lead agency that protects and promotes intellectual property rights including trademarks and patents. Find more specific information at [KIPI](#).

Section IV: Market Sector Structure and Trends

Kenya's food retail sector is dynamic and rapidly evolving to meet changing consumer behaviors, and technological advancements. The sector has market players ranging from informal markets (open air markets, roadside vendors, dukas/kiosks) to formal retail chains (supermarkets and hypermarkets). Increased urbanization, a growing middle class, and increased demand for convenience and variety are the key drivers of growth in modern retail. The four largest supermarket chains, Naivas (108 outlets), Quickmart (61), Chandarana Foodplus (27) and Carrefour (28) have partnered with online delivery firms to meet increased demand for convenience. The partnership also allows the supermarkets to reach a wider customer base, and to maintain their competitiveness. The formal retail food sector reached an estimated value of \$12 billion in 2024. Informal retail still dominates the sector due to its lower prices.

Retailers attract customers through a variety of product promotions and convenience services including 24-hour operations, customer loyalty programs, and special offers. Local producers and importers of consumer-oriented products use in-store promotions, weekend and/or holiday discounts, billboards, brochures, and flyers to advertise products. However, the sector faces challenges including supply chain inefficiencies, regulatory hurdles, and fluctuating commodity prices. The sector is attracting investments in supply chain infrastructure, retail technology, and food processing (e.g., bakeries, delis, and ready-to-eat meals in the stores).

Food Processing Sector

In 2024, Kenya's food processing sector was valued at approximately \$9 billion, with a projected compound annual growth rate of 7.1 percent over the next five years. Additionally, by 2030, the market is expected to reach around \$13 billion according to a 6Wresearch report. The food and beverage sector holds significant position in the overall market. The sector is driven by more than 1,200 companies involved in processing dairy, beverages, fruits and vegetables, meat and poultry, fish, grain milling, oils, and fats, among other products. There is potential for growth in value addition and the export of processed foods. However, the sector is constrained by high production costs, inadequate infrastructure, limited access to credit, and competition from imported products.

U.S. suppliers of food ingredients may find opportunities in Kenya's food processing sector. Local ingredient production does not always meet the processing industry's demand, including key ingredients such as soybeans, corn, and wheat.

Hotels, Restaurants, and Institutions (HRI)

Kenya's food service sector includes a wide range of establishments, such as restaurants, cafes, fast food outlets, and catering services. The industry is projected to grow at a compound annual growth rate of 9.44 percent from 2024 to 2028, reaching a market volume of \$424.90 million by 2028, according to Report Linker. The sector's growth is fueled by increasing urbanization, a growing middle class with rising disposable incomes, and changing consumer preferences towards dining out and convenience foods. American fast food chain outlets, such as Kentucky Fried Chicken (KFC), Subway Ltd., Domino's Pizza, and Cold Stone Creamery, are present in Kenya. American pizzeria Papa John's International, opened a restaurant in Nairobi, and has plans to open 13 more restaurants.

Kenya's hotel industry is experiencing growth due to an increase in tourism and investment in infrastructure. Accommodation and food service activities sector grew by 25.7 per cent in 2024 compared to 33.6 per cent growth recorded in 2023. This growth was mainly driven by an increase international and local conferences and meetings, tourist arrivals which rose by 12.1 percent to stand at 1.83 million. Hotel bed-nights occupied increased by 18.9 percent to 10.26 million in 2024.

International hotel brands, such as the Best Western Group, Kempinski, Crowne Plaza, the Marriott Group, Dusit2 International, and Accor are present in Kenya. Nairobi's growing role as a business and conference center has driven expansion in the hotel sector.

Distribution Channels

Most Kenyan food retailers and service providers purchase U.S. food products from local importers instead of importing directly. Local importers usually source U.S. products from consolidators in the United States, the United Arab Emirates, South Africa, and Europe. Importers then sell their goods directly to food retailers, hotels, and restaurants, or indirectly through appointed distributors and agents. U.S. food manufacturers and distribution companies do not generally have a direct presence in Kenya.

Section V: Agricultural and Food Imports

Table 3: Imports of Agricultural and Food Products, 2020-2026

Agricultural Products Imports	2020	2021	2022	2023	2024	2025^E	2026^F
Total agricultural product imports (in million USD\$)	\$2,701	\$3,261	\$3,633	\$3,690	\$3,452	\$3,800	\$4,000
Total agricultural products imports from the United States (in million USD\$)	\$32	\$63	\$98	\$137	\$46	\$80	\$100
Total imports of consumer-oriented foods and seafood products from the world (in million USD\$)	\$484	\$508	\$545	\$596	\$483	\$483	\$500
Total imports of consumer-oriented foods and seafood products from the United States (in million USD\$)	\$8.50	\$9.80	\$9.00	\$7.30	\$9.80	\$10.0	\$11

Data Source: Trade Data Monitor, LLC, and FAS/Nairobi Estimates

Best High-Value, Consumer-Oriented Product Prospects (USD\$)

Table 4 : Top Ten Imported Consumer-Oriented Agricultural Products, 2020-2024

Product Category	2020	2021	2022	2023	2024
Soup & other food preparations	92,805,905	86,341,461	100,054,182	175,662,028	95,737,134
Dairy products	111,277,689	105,396,137	153,835,636	136,336,445	80,811,054
Distilled spirits	47,138,868	59,302,181	45,787,147	44,691,651	58,696,241
Bakery goods, cereals, & pasta	34,852,495	38,776,800	29,535,340	33,625,627	33,806,859
Wine & related products	21,161,015	25,328,969	23,782,479	24,595,371	23,504,858
Fresh fruit	26,054,312	30,684,102	26,081,372	23,265,090	22,442,921
Chocolate & cocoa products	15,889,261	18,217,045	16,590,869	16,871,770	20,102,338
Processed fruit	22,970,252	20,519,589	26,470,509	24,378,299	19,576,406
Condiments & sauces	8,744,802	10,204,567	10,532,156	12,185,515	15,962,836
Non-alcoholic bev. (ex. juices, coffee, tea)	11,318,675	12,538,548	15,261,297	11,375,294	13,631,869

Data Source: Trade Data Monitor, LLC

Table 5: Top Ten Fastest Growing Imported Consumer-Oriented Agricultural Products in 2024, based on highest growth rate in the last five years based on value.

Product Category	**Market Size - 2024(Volume) Metric Tons	Imports - 2024 (\$1,000)	5-Year Average Annual Growth Rate (%) 2020-2024	Import Tariff Rate (%)
Meat products nesoi	109	1,200	63%	35%
Pork & Pork products	3,155	8,361	29%	35%
Eggs and egg-products	637	2,347	22%	35%
Coffee, roasted and extracts	1,258	8,139	21%	35%
Nursery products & cut flowers	1,361mts	11,423	17%	35%
Condiments & sauces	375,305 Litres	15,963	16%	35%
Tree-nuts	2,582	3,641	14%	35%
Chewing gum & candy	1,852	5,592	12%	35%
Fruit & Vegetable juices	3,770	5,670	9%	35%
Spices	6,626	5,834	8%	35%

Sources: ¹Trade Data Monitor, LLC; ²East Africa Community Common External Tariff Book

More specific retail information can be found at:

- [Naivas Supermarkets](#)
- [Quickmart Supermarkets Ltd.](#)
- [Chandarana Food Plus](#)
- [Carrefour Supermarkets Kenya](#)
- [Retail Trade Association of Kenya](#)

Section VI: Key Contacts and Further Information

Office of Agricultural Affairs, Embassy of the United States of America

United Nations Avenue, Gigiri

Email: Agnairobi@usda.gov

www.fas.usda.gov

Kenya Bureau of Standards (KEBS)

Email: info@kebs.org

<http://www.kebs.org>

Kenya Plant Health Inspectorate Service (KEPHIS)

Email: director@kephis.org

www.kephis.org

Department of Veterinary Services (DVS)

Email: veterinarydepartment@yahoo.com

<https://www.kilimo.go.ke/management/state-department-of-livestock/>

National Biosafety Authority (NBA)

Email: info@biosafetykenya.go.ke

<https://www.biosafetykenya.go.ke/>

Ministry of Health

Public Health Department

<http://www.health.go.ke/>

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Attachments:

No Attachments