

THE KENYAN BEER INDUSTRY 2005



KENYA

EXPORT PROCESSING ZONES AUTHORITY



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1 Industry Overview

1.1 Global barley industry

Barley is one of the most highly adaptable of the cereal grains, with production in climates ranging from sub-Arctic to sub-tropical. Barley is grown on a large scale in Russia, Australia, Germany, Turkey, and North America. The leading exporters of barley are the European Union, Australia, and Canada.

Because of its use in malt beverages, barley is grown in many areas of the world as much for cultural as economic reasons. Europe has long been a producer of malt barley. The use of subsidies to encourage production has resulted in the European Union competing with Canada as the largest exporter. US exports and market share have dropped substantially since the 1980s. Saudi Arabia, Japan, and China are the largest importers of barley. Imports to Saudi Arabia are used for livestock feed, while Japan imports barley for food and malt production. A growing percentage of the world barley trade is in the form of malt.

1.2 Global beer industry

World beer and barley industry is on the rise especially in the developed countries. This has been propelled by economic growth, technology advancement, high per capita beer consumption, improved quality and globalisation of markets that has provided better market opportunities. Likewise some of the developing countries with better economic indexes are expected to experience growth as well. In other regions, the industry has either declined or is stagnant as a result of economic recession, health and social concern, negative influence on globalisation of markets, lack of donor funding support, and industrial brewing technology as in the case of some African countries.

Production of beer worldwide is forecasted to increase to an annual growth rate of 2.3 percent through 2005 to a volume of about 153 billion litres. Demand in the developed world will continue to be restrained by health and social concerns, high taxes and competition from alternative beverages, although favourable demographic patterns will help to boost consumption. In many developing nations, demand is expected to rise with the strongest gains being in Asia especially China and Eastern Europe. This is propelled by economic recovery, expanding population, rising disposable income, improvement in beer quality, efficient distribution systems, high per capita consumption levels, and rising popularity of beer at the expense of traditional beverages, especially among women, youth and more affluent consumers.

Table 1: World Beer Production 2000-2003 (figures in million hectolitres)

Region	2000	2001	2002	2003
Europe	481.3	492.3	506.0	509.8
America	480.8	474.8	497.8	487.2
Asia	350.5	369.2	380.0	385.7
Africa	61.7	63.4	63.6	64.2
Australia	21.1	21.0	21.5	21.5
Word Total	1,395.4	1,420.7	1,450.9	1,468.4

Data source: LookSmart, Ltd 2003

Beer is considered a mature product, so growth occurs at a slow rate relative to newer industries. The industry measures beer consumption using beer shipments as a proxy. Recent growth in beer consumption is attributed to the increase in the



population of adults over the age of 21. Despite the overall increase in beer shipments, per capita consumption has actually decreased since the early 1980s. This may be an indication of the effectiveness of public policy and private sector initiatives encouraging moderation and personal responsibility regarding alcohol consumption.

Generally, world beer production has been on upward trend with minimum annual growth rate of 1.3 % between 2000-2003. The growth in beer production has been remarkable in Asia, Europe, America, while Africa and Australia production growth rate has remained at less than one %. Europe is the world-leading region in beer production with a growth rate of 1.5 % between 2000-2003, followed by USA, Asia, Africa and Australia respectively.

Among the various types of beer, lager beer is the most commonly produced and consumed though other types of beers are also available in the market. Beer brewing specification mostly includes water, grain sugar, hops, and yeast for fermentation then addition of other flavours if necessary, though this is not common. Barley is more preferred for brewing beer as it consists of strong enzymes capable of breaking grain sugar into maltose necessary in beer fermentation.

Kenya has a flourishing beer industry producing high quality beer recognised internationally. This has been possible due to factors such as good climate for agro-production, availability of barley, affordable labour, local market (beer per capital consumption at 14 litres), access to the regional markets like COMESA and the East African Community. Kenya's strategic location in the East African coast provides accessibility to the East and Central African markets via International seaport/airport. The Kenya government has additionally set up investor friendly centres such as the Export Processing Zones Authority and the Investment Promotion Centre to facilitate investors setting up projects in Kenya. Furthermore, investor friendly policies in place include the liberalization of marketing and processing of cereals and other agro-produce, removal of duties on importation of farm inputs and free repatriation of capital and profits.

Investment opportunities in the sector that can be explored further include supply of farm machinery to barley farmers, production of aluminium cans for packing beer and soft drinks, barley production/processing to malt and set up of brewing plants to weaken the present monopoly.

2 Industry Structure

Kenya's food and beverage processing industry¹ comprises more than 1,232 businesses. Agro processing is the largest manufacturing sub sector accounting for 13% of total manufacturing output (2002). The businesses range from small family-owned businesses to large businesses listed on the Nairobi Stock Exchange and subsidiaries of foreign or multinational businesses. Major multinationals have established operations in Kenya as foreign companies or as joint ventures with Kenyan shareholding to supply the domestic and neighbouring markets. East African Breweries Ltd (EABL) partners with Guinness PLC and Diageo Group to brew and supply bottled beer to the East African and COMESA markets. The company produces the same high standard of their products that are well known around the world.

Beer industry in Kenya dates back to 1922 when two brothers from England, George and Charles Hurst, started brewing beer in Kenya. The two formally incorporated their business as a private company under the name of Kenya Breweries Ltd. In 1929 the first malted barley beer was brewed and the first batch delivered to New Stanley Hotel where it was opened with mixed reaction. In 1930, the first lager beer was brewed and released into the market. By 1938 the company was recognised for its beer after it

¹ Kenya's food and beverage industry is composed of the following key production sectors: beer brewing, dairy and meat products, bakery goods, grain milling, edible fats and oils, beverages, fruits and vegetables processing, fish processing, wines and spirits.



won the first brewing award in an international competition. Bottled beer consumption was exclusive for whites in postcolonial era until 1947 when Africans were allowed to drink formal sector beer.

Kenya Breweries Ltd became a public limited company in 1934, after which it incorporated Tanganyika Breweries and changed its name to East Africa Breweries Ltd making the first move into the East African market. The company became a holding company after merging with beer makers Allsopps EA Ltd in 1962 and Kenya Breweries Ltd was re-established as a major partner in Nairobi and Mombasa. In 1964 it acquired equity interest in Tanzania's Kilimanjaro Brewery and a year later, Guinness East Africa was incorporated in Kenya. By 1972 EABL had the largest public share issue in Kenya of up to more than 23,000 shares making it the only key player in beer and barley production since 1947.

Currently, Kenya barley investment infrastructure stands at around KShs 1.9 billion. To break with tradition of selling only malted beer, the company started brewing 100% non-malted beer (Citizen Lager) in 1997. The company has also diversified into non-alcoholic beverages e.g. Malta Guinness in the backdrop of beer demand.

EABL has extensive beer operations within the East African Community member states having 3 independent brewing entities namely:

- Kenya Breweries Ltd. (KBL-Nairobi, Kenya) 80% ownership
- Uganda Breweries Ltd. (UBL-Kampala, Uganda) 98% Ownership
- Kibo Breweries Ltd. (TBL-Moshi Tanzania) 20% Ownership

Other subsidiaries include, Kenya Malting Ltd. solely for barley farming and malt processing, and Central Glass Ltd, which dominates local glass packaging market and exports to Ethiopia, Rwanda D.R Congo and Seychelles.

3 Production

3.1 Beer production

Generally, beer production in the East African Community (EAC) region has been stagnant. Kenya leads with beer production of 2.8 million hectolitres (hl) for the year 2003, Tanzania 2.1 million hl and Uganda 1.3 million hl. It is important to note that besides being a market leader in this sub sector, Kenya has extended beer production operations to each of the EAC Member countries.

Table 2: East Africa Beer Production in 2000-2003 (In Millions of hectolitres)

Region	2000	2001	2002	2003
Kenya	2.5	2.6	2.7	2.8
Uganda	1.5	1.3	1.3	1.3
Tanzania	2.0	1.9	2.0	2.1
Total	6.0	5.8	6.0	6.2

Source: East African Breweries

According to EABL 2002/2003 financial report, beer market trend has gone down by 4%. The consumption by volume has also been declining at an annual rate of 5% and consequently beer per capita consumption down from 14 litres to 8 litres for the last decade. The basic attributes to beer industry non-performance are the critical challenge of taxes, which account for 50 % of beer production cost, gradual consumption decline as a result of economic hardship and competitive price on other alcoholic beverages.

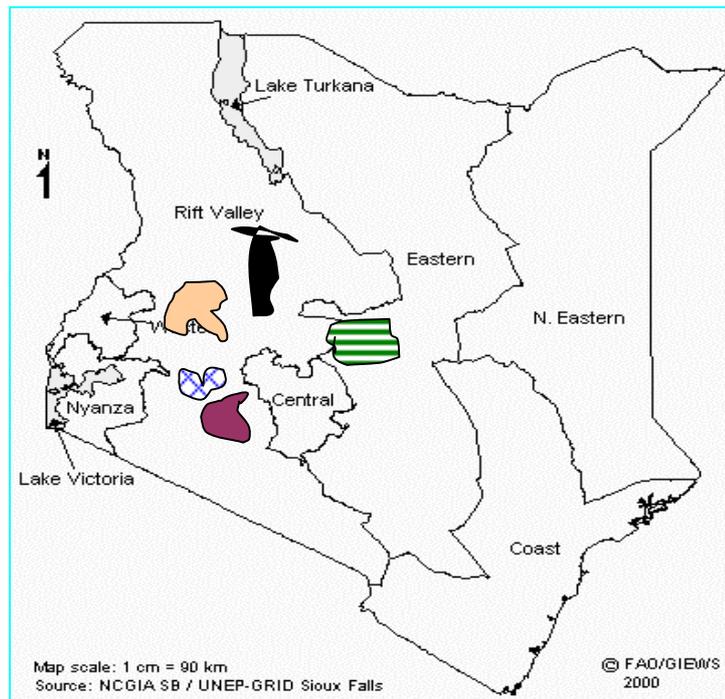


3.2 Barley farming

Barley farming in Kenya was introduced by the colonial regime as animal food until 1929 when it was commercialised into beer making. It is now one of the principal raw materials used to process barley malt, a vital ingredient for beer brewing. Kenya's barley growing area is estimated to be 85,000 hectares according to production estimates. However only 20,000 hectares is under barley production thus 65,000 hectares has not been utilised. Barley crop is grown in large-scale farms with relatively flat landscape to allow use of farm machineries from ploughing to harvesting. This method ensures high efficiency in crop production and guarantees economies of scale in order to provide for local and export markets.

Barley does well in high and medium altitude with consistent annual rainfall of more than 635mm. It is commonly grown in Rift Valley and Central provinces (Kenya's granary), owing to high productivity of foods and cash crops. Below is a map indication of barley growing locations in Kenya.

Map1: Map of barley growing locations in Kenya



Key



Timau near Mt Kenya



Moiben near Eldoret town



Nakuru*



On the wetter escarpment of Samburu district near Maralal town



Molo near Nakuru town

*Although Nakuru has potential, the soil has high nitrogen content, which is not suitable for growing barley for beer brewing



Kenya Malting Ltd. (KML), a subsidiary of EABL, solely produces, processes and markets barley seeds and barley malt in Kenya. The company contracts farmers who have a minimum of 125 acreage of land to grow either barley seed or barley for processing.

The first category of farmers grow barley seed and sell them to the company for production of three types of seeds namely Kalne, Sabini, and Bima. Currently the company is only offering Sabini and Bima since Kalne has become prone to fungus and gives lower yields. Kenya Plant Health Inspectorate Service (KEPHIS), an independent government regulatory agency, certifies seed quality standard before they are offered for sale to farmers. Barley seeds are packaged in 50kg bags and cost between KShs 2,000 to 2,500 (US\$ 25-31.25).

The second category of farmers grow barley for processing malt for beer brewing. Regardless of the market or weather patterns in future, the company and farmers agree on the sale price of barley when signing the contract. The year 2004 sale price agreed upon is KShs. 1,520 (US\$19) for a bag of 80kg.

Courtesy of EABL, farmers are offered guaranteed loans aggregating KShs 450 million (\$5.7 million) annually from banks such as Kenya Commercial Bank, Standard Chartered Bank of Kenya and Barclays Bank of Kenya, to finance 50% of crop production and repayment is done through individual accounts after the company pays farmers for their produce. Kenya barley malting infrastructure is currently worth over KShs.1.9 billion (\$238 million) which includes malting industry in Nairobi, research facilities in Moiben, Uasin Gishu district and a barley filtration and storage facility in Molo.

KML has also contracted transporters who deliver barley from farmers to various storage and processing destinations at an average cost of Kshs. 6.5 per tonne per kilometre.

Production capacity of barley is unlimited owing to good weather, and on average one hectare of land can yield at least 2.6 tonnes of barley. According to EABL's financial results of 2003, the company processed 20,744 tonnes of net sale volume for KShs. 734 million as opposed to 17,067 tonnes of net sale volume for KShs. 590 million in 2002, which was an increase of 22%.

4 Market Conditions

Beer & barley can be considered as one of economic sub-sectors inherited from the colonial era. The idea was noble as the industry evolved to a giant brewery across the East African region under the name East African Breweries Ltd (EABL). Currently the company controls about 95% of bottled beer market in Kenya, about 30% share in Tanzania and around 60% market share in Uganda. The other major player in the bottled beer market in the region (Uganda and Tanzania) is SAB Miller of South Africa, which controls over 60% of the Tanzanian market and about 30% of the Ugandan market.

The market prospects within East Africa region are expected to rise as the sector focuses on innovation in the businesses and working with the respective governments in trying to reduce excise duty that is currently considered very high.

Kenya is self-sufficient in beer and barley and has remarkably invested in all the East African countries commanding the highest market share within the region. High excise duties charged on beer makes the sub-sector one of the main revenue earners for the government. EABL is currently one of the highest corporate taxpayers with annual turnover of Kshs. 28.9 billion and employs more than 1600 people across the region.

The sub-sector has undergone tremendous changes and currently Kenya is one of the world's leading producers of quality beer having won various international award



competitions on various brands of locally produced beer. The only major market player in the sector has been EABL though Castle Breweries Ltd of South Africa had ventured into the Kenyan market but opted out after sometime, citing problems in sourcing barley locally and the import duty charged by the government.

Beer market growth is flat in all the three states due to economic hardships that have continued to affect beer industry, coupled with high taxes, stiff competition from other beverage sub sectors and low consumer spending.

EABL currently enjoys trade monopoly in formal sector beer. Currently, branded beer accounts for 40% of alcohol market though it faces stiff competition from cheap spirits and illicit / traditional brews. There has been a reduction in beer sales volumes by more than one million hectoliters in the past decade. According to EABL half-year results, beer sales volumes went down by 4% while spirit sales volumes showed some gains during 2003, which indicates beer market shift to spirit or other cheap alcoholic beverages principally because of sale price considerations.

Among key brands of beer available in the Kenyan market are Tusker Lager, Pilsner Lager, Tusker Export, Tusker Malt, Pilsner Ice, Pilsner Ice Light, Allsops, White Cap, Citizen, and Guinness Stout.

Import/export of beer

Beer from malt is one of the principal domestic commodities for export to the common market for Eastern and Southern Africa (COMESA). Though not substantial, for the year 2002, Kenya recorded the following export value on beer from malt to the following destinations:

Table 3: Export of beer, 2002

Country	Amounts, Kshs
Tanzania *	KShs. 2.07 Million
Zambia	KShs. 0.01 Million
Uganda	KShs. 2.56 Million
Total	Kshs. 4.65 Million

Source: *Statistical Abstract 2003*

* Tanzania no longer COMESA member

In the last few decades Kenya has integrated beer operations within the East Africa region through EABL. Hence, export markets that existed in EA countries is served by Kenyan entities operating in those countries. Excise duty on production of beer in Kenya has also made beer sale prices less competitive on the international market.

Plummet demand on formal sector beer has also discouraged imports over a period of time since 1999. In 1998 Kenya imported beer brands such as Castle Lager and Guinness Milk Stout from SAB Millers from Tanzania, but when Castle breweries Ltd. launched their beer production unit in Thika in 1998, those brands were locally produced and hence reduced.

5 Beer Packaging

Returnable glass bottles traditionally dominated beer packaging in Kenya for years owing to on-premises drinking patterns. However, aluminium cans packaging has been growing in the market of late due to imported canned beer and soft drinks. This growth has further been catalysed by consumer preference of aluminium can package with perception of being lightweight, resistance to breakage, handling advantage, excellent graphics, convenience, portability and favourable image among consumers. Plastic beer packaging is not common, as it is for spirits, soft drinks and juices.



EABL'S response to aluminium can packaging has been encouraging and various brands of beer are now both in glass bottles as well as in aluminium cans. Pack sizes most available are glass bottles of 500ml and 300ml while aluminium can packs come in 340ml.

Glass bottled beer usage is common in on-premises drinking and is mostly available in public drinking places, large and medium size hotels, restaurants, wines and spirits shops, and supermarkets. Metal can packed beer is more common in supermarkets and wines and spirits shops for at-home and off-premises drinking consumers.

6 Legal and Regulatory Framework

Currently beer and barley sub-sector is under the monopoly of EABL that controls 98% of the Kenyan market. Though beer price is mostly influenced by excise duty, the monopoly can also influence beer prices or manipulate market forces of supply and demand for monopolistic profits. It further eliminates competitive ground that allows product quality improvement and consumer wider choice. Monopoly is more profound in barley farming where farmers are subjected to only one market point for seed and barley where they buy seed and sell their produce at a predetermined quantity and price.

The monopoly in this sub-sector should therefore encourage more investors in order to alleviate some of the unhealthy market imbalance that may unfairly influence farmers and beer consumers.

East Africa community trade block is another hope for the sector now that all the member states are currently negotiating for common external trade tariffs across their borders.

The Kenya Bureau of Standards (KEBS) sets the standard and approves the quality of beer and other alcoholic beverages in Kenya. Kenya Revenue Authority under the Ministry of Finance determines the rate of excise duty charged on alcohol and the mode of calculating the tax e.g. *ad valorem* system. Currently tax on beer is charged on per-litre basis, which is a shift from the old system of *ad valorem* basis.

National Cereals and Produce Board

The National Cereals and Produce Board advises farmers on grain growing and marketing, which includes barley. Established in 1939, the National Cereals and Produce Board has provided grain farmers with an important marketing outlet while, at the same time, undertaking food supply functions of the state. Though it has been exempted from State Corporations Act, and transformed into a commercial entity, the Board continues to maintain a firm presence in grain handling and marketing with self-sustainability as a goal. It remains an important player in grain trade and a food regulatory instrument.

The Board's principal trade remains the purchase and sale of food crops. Chief among them are *Maize, Wheat, Beans* and to a certain extent *Pulses*. In trading on these grains, the Board makes purely economic decisions on their purchase, pricing and disposal. Unless the Board is carrying out market stabilization programmes, or any other social function on behalf of the government, the Board's pricing policy is strictly determined by market trends.

Apart from trading in the above food crops, the Board also sells commodities such as rice, tarpaulins, gunnies and pesticides, which are required by farmers. Tarpaulins and gunnies are of various grades and are ideal for protection against weather and packing of grain.

With an elaborate countrywide network of facilities, the Board provides handling, storage and preservation services ideal for both farm produce and a wider range of products from the food industry. The services provided include:



- Drying -The Board dries your grain to the required moisture content suitable for storage. This service is quite helpful to farmers and traders in the management of their grain during wet periods.
- Grading and Cleaning - The Board cleans various grains and legumes to meet contracted specifications or those of the Kenya Bureau of Standards. It also grades grain, either for storage purposes, to comply with buyer's requirements or determine other grain quality factors which may be of importance to those who require the service.
- Pest Control - Annually, 30% of grains are lost through pests. To minimize such losses, fumigation and general pest control services are provided by the Board's highly- trained Pest Control Team that is capable of disinfesting grain from all common storage insect pests. The latest techniques are used which employ approved insecticides that are safe and environmentally friendly.
- Weighing - The Board also provides weighing facilities that give accurate weight of grain load. It operates this service to growers and other millers who would like to collect or dispose of their commodities at a later stage. The Board also provides Warehousing service to those who may want to lease storage space and facilities for their own uses. It allows growers, millers and other traders to minimize marketing risks. Warehousing is an alternative to storage and is both convenient and cost effective.
- Market Information - The Board exchanges grain market information and ideas with farmers on a domestic and international basis to enable them obtain optimum value in grain production and consumption.

7 Reasons to Invest in Kenya's Beer-Barley Sector

Kenya produces excellent beer, utilizing locally grown barley. Kenya's competitive advantage as an ideal investment destination in the beer/barley industry is supported by various investor friendly factors that include:

Availability of raw materials

Kenya produces its own barley for production of beer. This provides potential investors with locally available raw materials for the brewing of Malt and Lager beer. Kenya also produces wheat and rice for investors who would be interested in using alternative raw materials for brewing beer.

Local market availability

Kenya being the leading market in beer and barley in the East African region, offers investors a readily available market for beer and barley.

Good climate

Kenya offers ideal climatic and weather conditions for growing of barley mainly in Central and Rift Valley areas.

Financial Support

EABL offers financial support to farmers growing barley by providing guaranteed loans through local banks to the tune of 50% of the production cost.

Availability of affordable labour

Kenya offers potential investors with an abundant supply of affordable labour in the barley growing areas. Kenya also has a well-trained labour force in the handling of farm machinery, which is used in the barley growing farms.



Access to the regional market

Kenya's membership in regional trading bodies such as COMESA, African Union and the East African Community provides potential investors with a large potential market for their products.

Investor friendly policies

The Kenyan government has set up investor friendly investment policies such as:

- Incentive programs under the Export Processing Zones program
- Setting up of Investment Promotion Center (IPC) to assist investors interested in setting up projects in Kenya
- Liberalization of the economy thus creating an enabling environment for business in Kenya
- Reduction of set up costs on capital goods
- Duty free importation of farm inputs
- Free repatriation of capital and profits

Investment insurance

Kenya as a member of MIGA (Multilateral Investment Guarantee Agency) provides potential investors with an opportunity to insure their investment in Kenya against a wide range of non-commercial risks. Kenya is also a signatory of Africa Trade Insurance Agency (ATIA) and International Council for Settlement of Investment Disputes (ICSID).

Strategic location

Located on the East African coast and having the port of Mombasa, Kenya is strategically located for investors wanting to access the East and Central African market. Kenya is also a regional hub for airlines allowing for easy access from and to any part of the world.

Good quality of life

Kenya hosts a number of international organizations and foreign embassies and provides very good and up to standard living conditions for foreign investors wishing to reside in Kenya. With recognized international hotels, airports and entertainment centers, Kenya provides as much comfort for foreigners as in any European capital.

Stable political climate

Kenya has been one of the most stable countries in Africa since independence. The country has had three presidents with peaceful transition taking place from one Government to the next and elections were held regularly. This is also manifested in the number of international and regional organizations headquartered in Nairobi including the UN, etc.

8 Investment Opportunities

Some of the investment opportunities in the beer-barley sector include:

- Supply of farm machinery to barley farmers – The farming of barley is highly mechanised and requires a variety of farm machinery that are currently being imported. There exists potential for setting up either an assembly or servicing industry for the farm machinery.
- Setting up of can manufacturing and canning facilities – Though there are few manufacturers of metal cans namely Metal Crowns Ltd, Friendship Containers Ltd, and Metal Box Ltd. among others in Kenya and East Africa region, all aluminium cans for use in packing canned beers and soft drinks are imported. Therefore investment in aluminium cans manufacture and canning facilities can be accommodated by the growing local market and regional market like Uganda, Tanzania, Rwanda and Burundi.
- Farming of barley - there is significant local and export market for barley within E. African countries for beer production in the region.



- Conversion of barley into malt – this is currently done by EABL through Kenya Malting Ltd. There exists good potential for the export of Malt into the East African Community and the larger COMESA region.
- Setting up of brewery plant - to further liberalise the market and reduce monopolistic conditions, there also exists potential for further investment in the beer brewing industry.
- Distribution of beer – another potential investment area is in the distribution of beer from source to market.

9 Main Players in the Industry

Company	Industrial role
<p>East African Breweries Ltd Tusker House, off Thika Rd. Ruaraka P.O. Box 30161, 00100 City Square Nairobi, Kenya Tel: +254-20-864000/802701 Fax: +254-20-802054/861090 Email: kbl@kenyabreweries.co.ke Web: www.eabrew.com</p>	Production of beer
<p>Kenya Maltings Ltd. Kampala Rd., Industrial Area P.O. Box 41412, Nairobi, Kenya Tel: +254-20-533613-6 Web: www.eabrew.com</p>	Barley production, barley seed production, barley malting and marketing
<p>National Cereals and Produce Board (NCPB) Head Office - Nafaka House Machakos Rd., Industrial Area P. O. Box 30586, Nairobi, Kenya Tel: 254-20-536028 Fax: 254-20-54224 Email: cereals@africaonline.co.ke</p>	Controls and regulates cereals production, marketing, storage, distribution and standard measures
<p>Kenya Plant Health Inspectorate Service (KEPHIS) Waiyaki Way P.O. Box 49592, 00100 GPO Nairobi, Kenya Tel: +254-20-884545/882308/882933 Fax: +254-20-882265 Email: kephis@nbnet.co.ke Web: www.kephis.org</p>	Inspection, certification and approval of barley seed before sales to farmers
<p>Central Glass Industries P.O. Box 49835, Nairobi, Kenya Tel: +254-20-803681-9 Web: www.eabrew.com</p>	Manufacture of beer and other glass bottles
<p>Kenya Revenue Authority (KRA) Times Towers Bldg., Harambee Ave. P.O. Box 48240, 00100 GPO Nairobi, Kenya. Tel: +254-20-310900/315553 Email: info@kra.go.ke Web: www.kra.go.ke</p>	Collector of government revenue i.e. excise duty on beer
<p>Kenya Bureau of Standards (KEBS) Belle-vue Area, off Mombasa Rd. P.O. Box 54974, 00200 Nairobi Kenya Tel: +254-20-605490/605506/605550 Fax: +254-20-604031</p>	Beer/alcohol specifications and other quality measures.



<p>Email: info@kebs.org Web: www.kebs.org</p>	
<p>Export Processing Zones Authority Administration Building Athi River EPZ, Viwanda Road Off Nairobi - Namanga Highway P.O Box 50563, 00200 Nairobi Kenya Tel: +254-45-26421-6 Fax: +254-45-26427 Web: www.epzakenya.com Email: info@epzakenya.com</p>	<p>Export oriented investment promotion and facilitation</p>
<p>Investment Promotion Center (IPC) 8th Floor, National Bank of Kenya Bldg. Harambee Avenue P.O. Box 55704, 00200 City Square Nairobi, Kenya Tel: +254-20-221401-4 Fax: +254-20-336663 Email: info@investmentkenya.com Web: www.investmentkenya.com</p>	<p>Investment promotion and facilitation</p>
<p>Ministry of Trade and Industry Telposta Towers, Kenyatta Avenue P.O. Box 43137 Nairobi, Kenya Tel: +254-20-315001-4 Fax: +254-20-315011 Web: www.tradeandindustry.go.ke</p>	<p>Creation/facilitation of enabling business environment for business</p>
<p>Ministry of Agriculture & Rural Development Kilimo House, Cathedral Road P.O Box 30028 Nairobi, Kenya Tel: +254-20-2718870 Fax: +254-20-2720586 Web: www.agriculture.go.ke</p>	<p>Agricultural policy and services</p>

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