

VEGETABLE OIL INDUSTRY IN KENYA 2005



KENYA

EXPORT PROCESSING ZONES AUTHORITY



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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

For more information contact:

Evelyn Noah
Promotion Executive
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
Email: enoah@epzakenya.com

Margaret Waitthaka
Manager, New Investments Department
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
Email: mwaitthaka@epzakenya.com

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This report was prepared by:

PKF Consulting Ltd
Kalamu House, Waiyaki Way
P.O. Box 47323-00100 Nairobi
Kenya
Tel: (254-20) 4446616-9
Website: www.klsa.net

International Research Network
4th Floor, Corner Plaza, Westlands
P.O. Box 11445-00400 Nairobi
Kenya
Tel: (254-20) 3741342
Website: www.irn.co.ke



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Abbreviations

COMESA	Common Market for Eastern & Southern Africa
EPC	Export Promotion Council
EU	European Union
FAO	Food and Agriculture Organization
FPEAK	Fresh Produce Exporters Association of Kenya
GDP	Gross Domestic Product
HCDA	Horticultural Crops Development Authority
KARI	Kenya Agricultural Research Institute
KShs	Kenya Shillings
VOPS	Vegetable Oil Protein System
WTO	World Trade Organisation

Annual Exchange Rates (KShs. to US\$)

Year	Rate
1999	70.3
2000	76.2
2001	78.6
2002	78.4
2003	75.9
2004	80.0 (As at 31 st August 2004)

For latest rates click on <http://www.centralbank.go.ke/cbk/FXrates/archives.html>



1 Industry overview

Agriculture accounts for about 24% of Kenya's GDP with an estimated 75% of the population depending on it either directly or indirectly. The sector grew by 1.5% in 2003, as compared to 0.8% the previous year.

Vegetable oil is one of the key sub-sectors of agriculture, with soybean and palm oil being the leading sources in production of vegetable oil in the world respectively. At present, Kenya's domestic production of edible oils is estimated at 380,000 tonnes, only about one-third of its annual demand. The remainder is imported, at a cost of \$140 million, making edible oil the country's second most important item after petroleum.

Area under vegetable oil crops has remained fairly steady over the years. The key reason for this has partly been attributed to irregular and unstable weather conditions.

The key players in the vegetable oil industry in Kenya comprise **processors** who extract the oil from the seeds and also produce oil cake for use in animal feeds, and **refiners** who convert crude oils into a form suitable for human consumption.

The FAO has been exploring the potential of oil palm in western Kenya, in partnership with one of the region's largest agro industrial producers, the Mumias Sugar Company, and its outgrower network of some 60,000 farmers. FAO says profitable oil palm production in Western Kenya will have significant benefits for socio-economic development in rural communities and for food security in farm households. It will increase incomes, improve diets, reduce imports of food oil and also provide much-needed crop diversification for local sugar growers.

Increased domestic production of oilseeds by local manufacturers in Kenya has been constrained by inadequate supply of raw materials, leading to efforts by Food and Agriculture Organization (FAO) to initiate development of raw material centers in the country, especially in the key growing areas of Western Kenya and the Lake Victoria basin. Players like Mumias Sugar Company have played a pivotal role in developing the sector with assistance from FAO. Processing companies like Bidco have also actively supported and encouraged local farming of vegetable oil crops and specifically palm oil.

Kenya has been undertaking continued research through the Vegetable Oil Protein System (VOPS). The objective of VOPS is to support an integrated, sustainable, applied research and extension program on the vegetable oil / protein system aimed at the removal of constraints to domestic oilseed production, processing and use of edible oils.

2 Industry structure

Private investors are largely credited with the sub-sector's growth, with the government largely playing an advisory role. The public sector players include the Ministry of Agriculture, Ministry of Trade and Industry, Ministry of Finance and other government agencies like HCDA and KARI. The processing and refining companies represent the private sector and related development partners including large-scale growers and small-scale farmers.

Currently there are about 30 vegetable oil refiners in the country. The larger companies include Bidco Oil Refineries, KAPA Oil Refineries, Palmac Oil Refiners, Pwani Oil Refiners and Unilever. These companies engage in production of cooking oils, fats, edible oils, copra oil and corn oil among other oil products.

Some of the large vegetable oil refiners are also involved in growing of vegetable oil crops and supporting small scale farmers in better farming methods to increase the vegetable oil production in Kenya.



3 Vegetable oil production

3.1 Range of vegetable oil crops

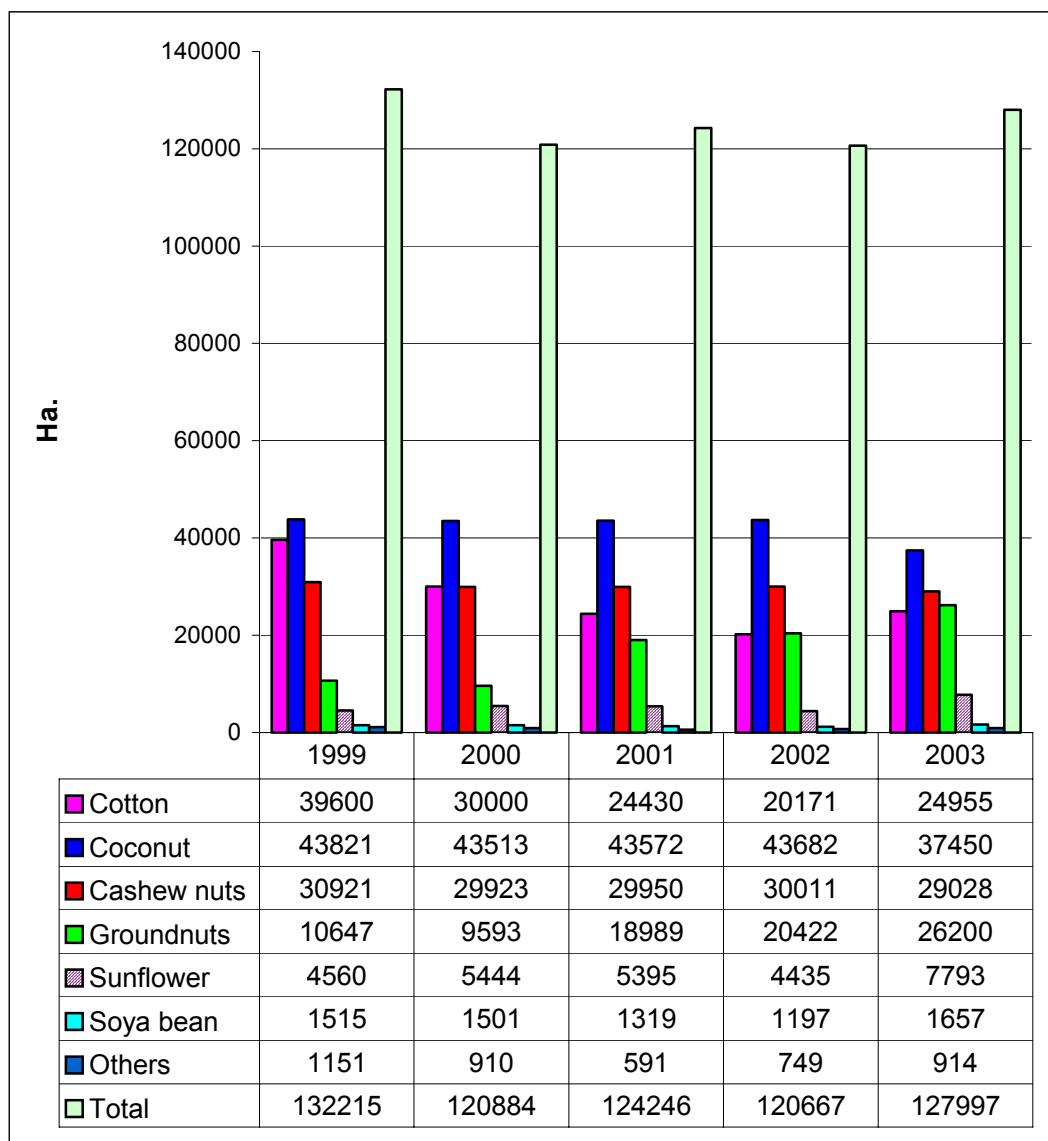
The range of oil crops in Kenya include sunflower, cottonseed, soya, groundnuts, rapeseed, bambara nuts, castor, palm oil, sim-sim, linseed, nuts, grains, beans, seeds (e.g. Sesame), maize germ, copra and olives amongst others.

3.2 Production

Kenya is making efforts to satisfy the local and export demand for various vegetable oil crops, and in spite of unreliable climatic conditions in recent years, production has remained steady, with commendable growth in some of the crops.

The total area covered by vegetable oil crops has increased from 120,667 hectares in 2002 to 127,997 hectares in 2003 as shown in chart 1 below.

Chart 1. Area under vegetable oil crops in Kenya, 1999-2003 (Ha)



Source: Crop Dev Division 2003 Annual Report, Ministry of Agriculture,

Coconut is one of the major oil crops covering large cultivation areas in Kenya. The area under coconut cultivation has been fluctuating over the years with the highest area



covered being about 43,821 hectares in 1999 while the lowest was 37,450 hectares in 2003. Other crops with high area coverage include cotton, cashew nuts and groundnuts.

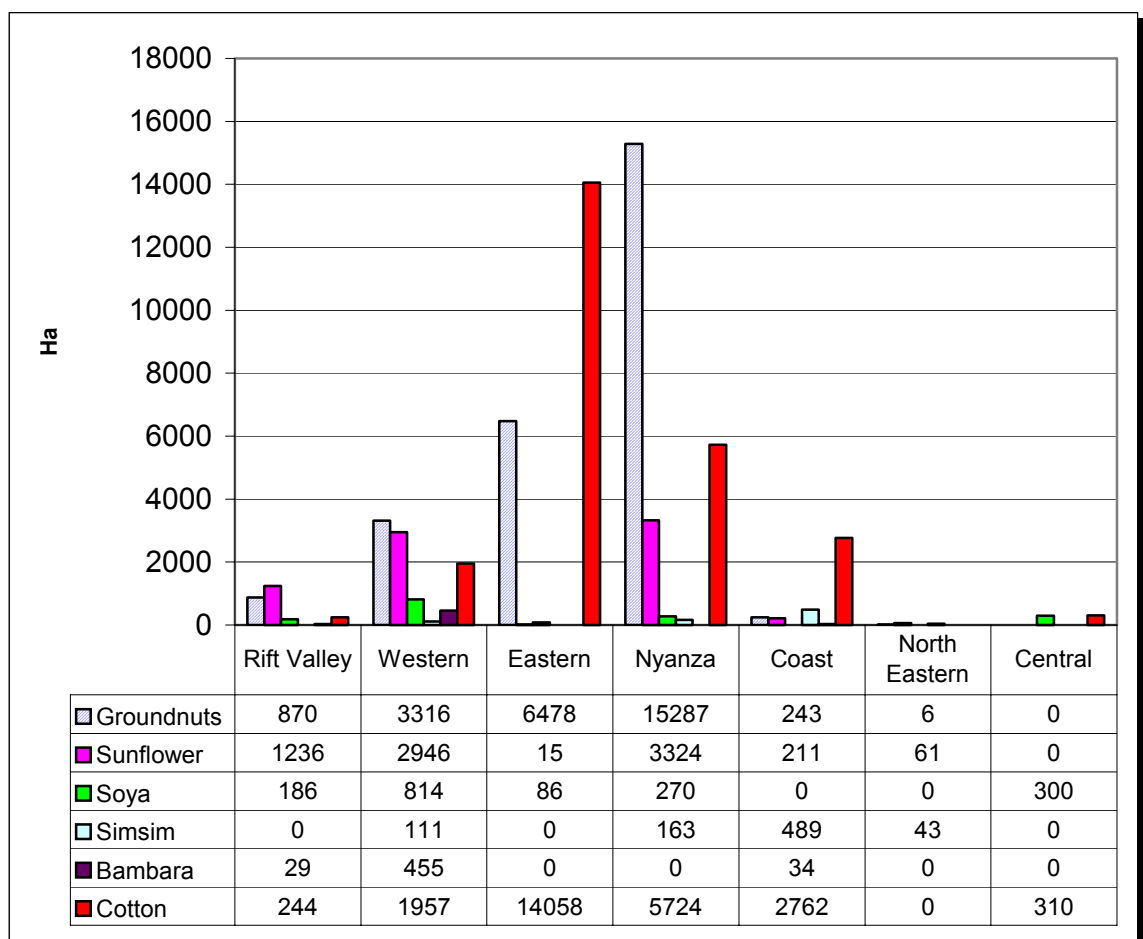
Cultivated area and production trend of oil crops like groundnuts, sunflower, soya beans, simsim, rapeseed, bambara nuts and castor have remained fairly constant. To foster growth, producers like Bidco have in the recent years encouraged farmers to grow more oil crops.

Furthermore, the FAO has initiated farmer-based support in oil crop growing areas in western Kenya. They have done this by creating Farmers' Field Schools network, in conjunction with KARI and Mumias Sugar Company, through the Mumias Sugar Company Outgrowers, which is estimated to have about 60,000 members. This is an association of sugarcane farmers who deliver their cane to the company. The company is based in western Kenya, a vital source (region) of natural resources for vegetable oil.

Some of these farmers, in addition to being members of the Mumias Sugar Outgrowers Association, are also members of the FAO field schools, and have taken part in planting oil palms with support of agronomists based at the Mumias Sugar Company.

By region, production of oil crops has been largely varied, differing with each oil crop.

Chart 2. Area under oil crop production by province, Kenya 2003. (Ha)

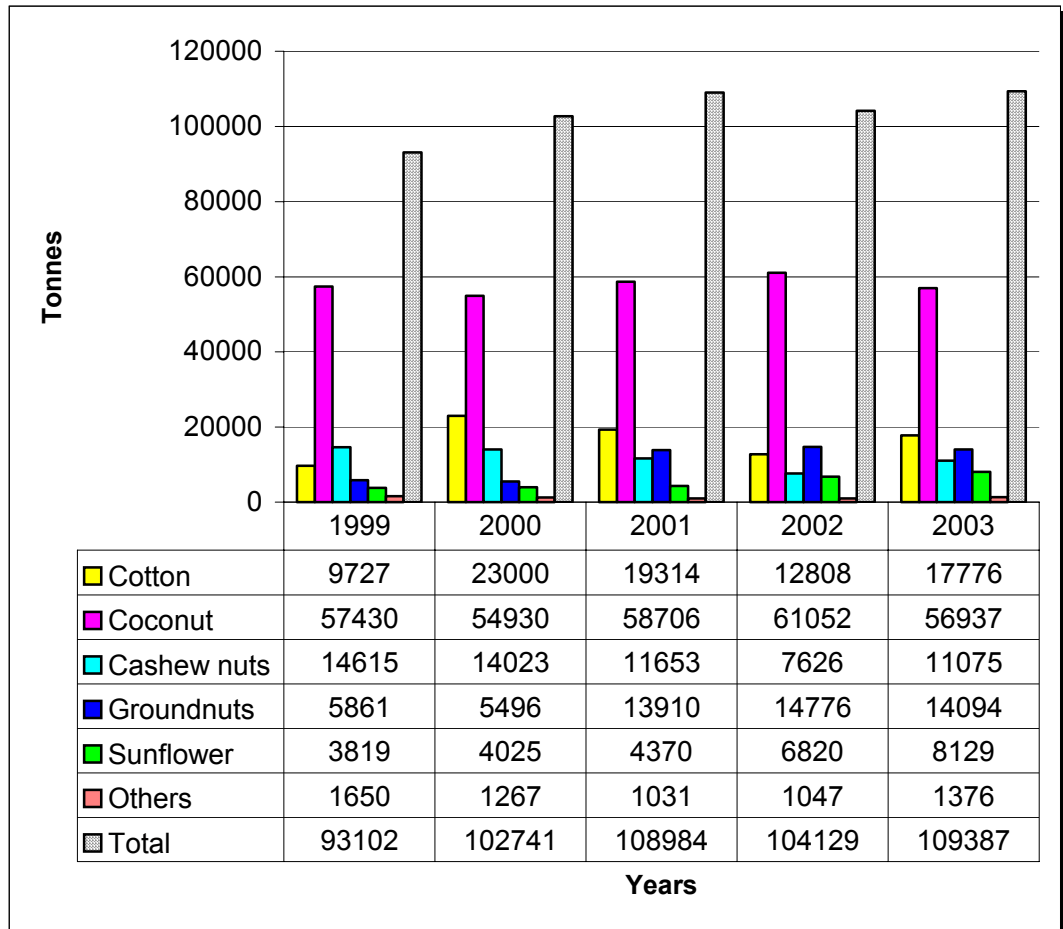


Source: Crop Dev Division 2003 Annual Report, Ministry of Agriculture

The vegetable oil crop production corresponds to the land area under crop. In recent years, the crop production has remained fairly stable, as illustrated in chart 3 below.



Chart 3. Production of vegetable oil crop Kenya, 1999-2003 (Tonnes)



Source: *Crop Dev Division 2003 Annual Report, Ministry of Agriculture*

Local production of oil crops is projected at 10 million metric tonnes by the year 2005, of which over 5 million metric tonnes are expected to come from the Lake Basin Region.

3.3 Projects

FAO is now exploring opportunities for boosting production of palm oil in western Kenya through its programme on integrated farming systems. This will involve seedlings from Costa Rica being grown in community nurseries and by the region's largest sugar producer, Mumias Sugar Company. Their cultivation would allow small-scale and industrial producers to reduce the edible oil deficit and, in the process, provide a badly needed source of extra income for western Kenya's rural areas, where one in two of the population lives in poverty.

The local climate is already favourable to a range of annual and perennial oil seed crops, including sunflower, soya, groundnuts, safflower, sim-sim and linseed, many of which are traditional crops in the area. According to FAO, the climate for oil palm in some of the western districts is comparable to - or even better than - that of the world's biggest oil palm grower, Malaysia: rainfall is more evenly distributed and thus the cumulative sunshine intensity is greater.

FAO would also like to boost small-scale oil extraction, which involves resources beyond that which most farmers have. The oil can be easily extracted by hand or with simple extractors and used in crude form in the household to produce not only tasty dishes but also products such as soap. The project envisages distribution to poor farm households in western Kenya of planting material and technical assistance to provide the basis for



small-scale oil extraction industries. To compete, FAO says, they will need access to small-scale processing and associated crop storage, handling and servicing technology, and to reliable, regularly available trading information.

In its effort to court local tastes, the project is sending a nutritionist from western Kenya to Ghana to undergo a cooking and nutrition course on the benefits and uses of red palm oil. She will use this training to produce a cookbook for western Kenya, adapted to local tastes and ingredients.

Around 10 000 palms had been planted by 2003, and 5 000 more were anticipated by the time the FAO project came to an end August this year. The initiative will continue under the direction of the Kenyan Agricultural Research Institute and the Government.

Another project is the VOPS. Phase I & II of this project aimed to characterize the Kenyan vegetable oil/protein sub sector and identify intervention points for its improvement. The two phases were successful in bringing together a team of professionals from different institutional backgrounds in the analysis of the sub sector. VOPS III, initiated in 1989, intended to build on this by establishing research capacity in VOPS Egerton University. The stated general objective of the VOPS project was to develop an integrated research and development program on the vegetable oil/protein system in Kenya aimed at the removal of constraints to domestic oilseed production, processing, and utilization of edible oils and protein cakes.

The project team participated in the National Committee for Oil crops, providing a consistent flow of information from the project to the government. In this way and through various other activities -- workshops, field days, participation in national and regional seminars, and the publication of a newsletter -- the project raised the profile of VOPS, possibly influencing the government to take key decisions such as decontrolling the prices of oil crops, reviewing the consumer prices of edible oils, and raising the duty on crude and refined imported palm oil. The training element of the project consisted of on-the-job, mostly computer-related training, for the research assistants; the MEPS training; and graduate training (two MSc and one PhD) for three senior staff from the Agricultural Economics Department of the University.

4 Market conditions

Kenya's trade policy objectives include moving towards a more open trade regime, strengthening and increasing overseas market access for Kenyan products, especially processed goods, and further integration into the world economy.

Kenya is striving to strengthen its regional and bilateral trade negotiations, in particular within the African region, as well as through its participation in the multilateral trading system. The Government has been pursuing an outward-oriented industrial policy in order to redirect industrial production in favour of exports.

Processing and marketing of vegetable oil is dominated by large vegetable oil processing companies i.e. Bidco Oil Refineries, Palmac Oil Refineries, Kapa Oil Refineries, Pwani Oil and Unilever.

Exports

Kenya exports vegetable oil and fats products to mainly East and Horn of African countries, as well as Europe and the United States of America (USA). Kenya is ranked 15 worldwide in export of vegetable fats and oils and their fractions (according to data available at the Ministry of Trade & Industry).



Table 1: Value of Domestic Exports

Domestic exports value 1999-2003 Value in Kshs '000					
	1999	2000	2001	2002	2003*
Oil seeds, oil nuts and kernels	67,420	42,537	66,126	84,441	N/A
Animal, vegetable oils and fats	2,096,020	1,204,373	1,298,468	2,277,164	2,410,000
Total	2,163,440	1,246,910	1,364,594	2,361,605	2,410,000

Source: Economic Survey, 2004 by Central Bureau of Statistics, Min of Planning & National Dev
* Provisional

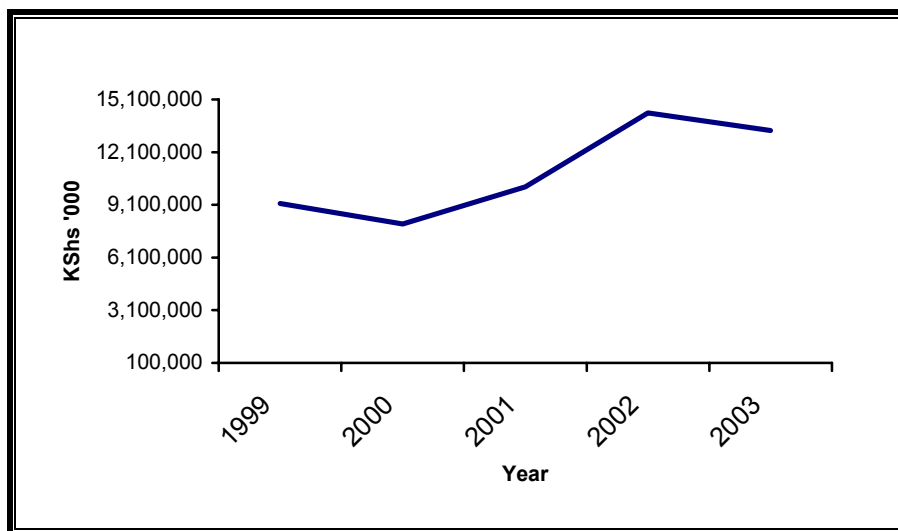
Exports of animal and vegetable oils from Kenya experienced a drop in year 2000 when they fell to KShs 1.2 billion from KShs 2.1 billion in 1999. However the exports picked up again from 2001 onwards increasing to KShs 2.3 billion in 2002 and KShs 2.4 billion in 2003. This increase was mainly due to expansion of markets in Uganda and Tanzania, among other countries, by Bidco Oil Refineries. Animal and vegetable oils contribute over 96% of the total exports while oil seeds, nuts and kernel contribute the remaining 4%.

The COMESA region is the principal market of Kenya's vegetable oil products; these include Uganda, Tanzania, Zimbabwe, Zambia, Zaire, Rwanda and Burundi. One of the leading companies in Kenya, Bidco recently opened processing plants in Uganda to further increase and develop their market in the region. Kenya's key export destinations for oil seeds include Netherlands, the UK, and Germany where export values stood at KShs 10 million, KShs 6 million and KShs 1.4 million respectively.

Imports

Kenya imports vegetable oils and fats in order to supplement its local production, which is presently inadequate to meet local demand. The trend of domestic imports is detailed in chart 4 below.

Chart 4: Value of domestic imports of vegetable oils & animal fats; 1999 – 2003 (KShs '000)



Source: Economic Survey, 2004 by Central Bureau of Statistics, Min of Planning & National Dev



Kenya imports mainly vegetable oil and fats, which contribute over 95% of the total animal and vegetable oils and fats imports. Animal oil and fats make up the balance of 5%.

5 Legal and regulatory framework

The Government, through the Ministry of Agriculture's Crop Development Division, plays a major role in development of key crops in the agricultural sector as a whole.

The Crop Development Division has the following functions:

- To promote production of food crops to enhance food security
- To promote production of cash crops such as coconut, cashew nuts and Simsim, that are some of the crops relied on by the vegetable oil industry
- To liaise with national and international institutions dealing with food/industrial crops
- To promote production of raw materials for agro-industries
- To develop, review and harmonise policy and legal framework for food and industrial crops
- To collect, process and analyse data and reports on agro-industry
- To collect data and prepare reports for early warning and food information systems
- To control migratory pests, storage and plant diseases
- To provide agricultural laboratory services

The seed companies in Kenya play important roles in ensuring quality seeds are available to farmers. Equally, they ensure that there are wider varieties for all climatic and geographical conditions suitable to the country's varied zones. In Kenya, the Kenya Seed Company, one of the largest African seed companies, has consistently and adequately ensured seed production and supply (since 1956) to meet the national requirements while surplus is exported to various countries in Africa, Europe, Asia and the Middle East. Among the international seed companies represented in Kenya are Pioneer, Panaar, Monsanto, and Seminis.

Under export incentive schemes, remissions, rebates and refunds of import duties are available on raw materials, capital equipment, machinery, and other components used in the manufacture and packaging of goods destined for export. Imports on which duties are also remitted include sowing seeds, industrial implements like unassembled trailers and semi-trailers, raw materials for use in the manufacture of component parts used in the manufacture of agricultural and horticultural equipment.

6 Reasons to invest in Kenya's vegetable oil industry

Kenya's competitive advantage as an investment destination for vegetable oil production is supported by various investor friendly factors as outlined below.

Local market availability

Currently the production in the country does not meet the local demand for vegetable oil, thus creating a shortfall that can be filled through additional oil factories.

Kenya is also moving strongly into industrial agricultural production. Foreign investment and sales focus on relatively new sectors such as cut flowers, selected green vegetables and pharmaceutical crops, and there is interest in diversification into new and alternative plantation crops that show potential.



Established seed industry

Existence of vegetable seed companies, both local and international - among the international seed companies represented in Kenya are Pioneer, Panaar, Monsanto, and Seminis. The Kenya Seed Company is one of the largest African seed companies.

Availability of affordable skilled & unskilled labour

Kenya offers current and potential investors with an abundant supply of affordable skilled and unskilled labour.

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 regional market for their products.

Investor friendly arrangements

The Kenya government can guarantee investor friendly arrangements such as:

- the Export Processing Zones (EPZ) program which offers attractive incentives to export-oriented investors and EPZ Authority to provide one-stop-shop service for facilitation and aftercare
- the Investment Promotion Centre (IPC) to promote all other investment in Kenya including in Manufacturing under Bond (MUB) program
- the Tax Remission for Export Office (TREO), a program for intermittent imports for export production
- Generous investment and capital allowances
- Double taxation, bilateral investment and trade agreements

Investment protection and insurance

The Constitution of Kenya provides guarantees against expropriation of private property. In addition, capital repatriation, remittance of dividends and interest are guaranteed to foreign investors under the Foreign Investment Protection Act (FIPA) (Cap 518).

Kenya as a member of MIGA (Multilateral Investment Guarantee Agency) provides investors with an opportunity to insure their investment in Kenya against a wide range of non-commercial risks. Kenya is also a member of the African Trade Insurance Agency (ATI), a multilateral export credit and political risk agency for COMESA member states as well as the 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 markets. Kenya is also a regional hub for airlines allowing for easy access from and to any part of the world.

Stable political climate

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

7 Investment opportunities

Given that Kenya imports over US \$100 million worth of edible oil annually, the investment opportunities in this sub-sector are quite enormous. The oil seeds that can be commercially grown in Kenya are many but of major importance are sunflower, simsim, soya beans, rapeseed, coconut, castor, groundnuts and sunflower.



The agro-ecological zone with potential for oil-crops production is Coast province. However, it is noted that with proper planning, there is large potential in the country's Arid and Semi Arid Lands (ASAL).

The government has been laying emphasis for developing the sector through fiscal measures that are geared towards supporting the development of the oilseeds sub sector through encouraging imports of oilseeds as raw materials rather than processed products (crude and refined oils). Private sector investment is equally being encouraged in oilseed production, marketing and edible oil processing (sunflower, simsim, groundnuts and soya beans).

Additional investment opportunities in the oil crop sub sector include:

- Cottonseed multiplication, development of new cotton ginneries, as well as the construction of textile industries and expansion of cotton plantations
- Production of cooking oil, soaps, animal feeds and other edible oils processing (all rely on the success of the oil crop industry for raw materials)
- Investment in plantations of coconut, cashew nut, sunflower, groundnuts, simsim and soya beans
- High quality packaging of cashew nuts for export and packaging other vegetable oil products
- Production of:
 - Fertilizers, chemicals
 - Better high yielding seeds and plant materials cross breed
 - Irrigation systems; water pumps, steel pipes, hosepipes and provision of modern irrigation facilities
 - Agricultural tools and equipments
 - Spare parts and accessories
- Assembly of tractors, generators, motors
- Organic farming
- Pest control, fumigation
- Provision of pre-cooling and cold storage facilities for vegetable products

In the service sector, opportunities exist in the following areas:

- Agricultural extension services
- Farmers Training - better production methods, quality control and improvement
- Transport services (from farm to markets)
- Availing credit and loan facilities to farmers

8 Main players in the industry

A growing number of companies have established operations to process and refine vegetable oil in Kenya.

Table 2: Vegetable oil processing and refining companies, Kenya

Company Name	Location	Activity Category	Products
Aberdare Oil Millers	Nyeri	Millers	Edible oils and fats
Afa Cooking Oil Manufacturers	Kakamega	Refiners	Fats, oils
Arkay Manufacturing Plant	Eldoret	Buyers of raw products	Sunflower, soya bean oil
Bidco Oil Refineries Ltd	Nairobi	Refiners	Fats, margarine, oils, industrial bulk oils
Corn Products Limited	Nairobi	Millers	Corn syrups, corn germ, gluten feed,



Company Name	Location	Activity Category	Products
			meal dextrose, dextrin, and waxy corn starch
Kapa Oil Refineries	Nairobi	Refiners	Fats, margarine, oils, industrial bulk oils
Kenya Nut Company	Thika	Processor	Macadamia nuts, oils
Menengai Oil Refineries Ltd	Nakuru	Refiners	Edible oil
Mumias Sugar Company	Mumias	Grower	Palm oil
Nakuru Oil Mills	Nakuru	Millers	Edible oils
Oil Crop Development Limited	Nakuru	Processors	Maize seed, vegetable oil
Oil Extraction Limited	Nakuru	Oil Extractors	Edible oils
Palmac Oil Refiners	Nakuru	Refiners	Fats, margarine, oils, industrial bulk oils
Premier Oil Extraction	Nairobi	Extractors	
Pwani Oil Products	Mombasa	Refiners	Fats, margarine, oils, industrial bulk oils
Rift Valley Product Limited	Nakuru	Processors	Crude palm olein, sunflower oil, plant extract
Sansora Oil Mill	Kisii	Millers and refiners	Grains
Unilever	Nairobi	Millers, refiners	Fats, margarine, oils, industrial bulk oils
Voi Industries Ltd	Nakuru	Processors	Cotton, sunflower seeds
Western Seed and Grain Co	Kitale	Processors	Seeds and grains

Source: Troika (Website): Ministry of Agriculture: Kenya Factbook, 2001

9 Useful contacts

Ministry of Agriculture & Rural Development
 Crop Development Division
 Kilimo House, Cathedral Road
 P.O Box 30028
 Nairobi Kenya
 Tel: 254-20-2718870
 Fax: 254-20-2720586
 Web: www.agriculture.go.ke

Investment Promotion Centre (IPC)
 National Bank Building, 8th Floor,
 Harambee Avenue
 P.O. Box 55704-00200 Nairobi,
 Tel: 254-20-221401-4
 Fax: 254-20-336663
 Email: info@investmentkenya.com
 Web: www.investmentkenya.com

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

Horticultural Crops Development Authority (HCDA)
 P.O Box 42601, Nairobi, Kenya
 Tel: 254-20-827260
 Fax: 254-20-827264
 Email: hcda.md@swiftkenya.com



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

Export Promotion Council
Anniversary Towers, 16th Floor
University Way
P.O. Box 42047 Nairobi, Kenya
Tel: 254-20-228534
Fax: 254-20-218013/228539
Email: chiefexe@epc.or.ke
Web: www.cbik.or.ke

Kenya Seed Company Ltd
P. O. Box 553
Kitale, Kenya
Tel: 254-325-20941/2/3/4/5/6
Fax: 254-325-20458
Email: kenseed@form-net.com

Fresh Produce Exporters Association of
Kenya (FPEAK)
P.O. BOX 40312, Nairobi, Kenya
New Rehema House, 4th Floor,
Rhapta Road, Westlands
Tel: 254-20-4451488
Fax: 254-20-4451489
E-mail: info@fpeak.org
Web: www.fpeak.org

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

Kenya Agricultural Research Institute
(KARI)
Kaptagat Rd, Loresho
P.O. Box 57811, Nairobi 00200, Kenya
Fax: 254-20-583344
Tel: 254-20-583301-20, 0733333223
0722206986, 0722206988
Email: resource.center@kari.org
Web: www.kari.org

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