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Report Highlights:

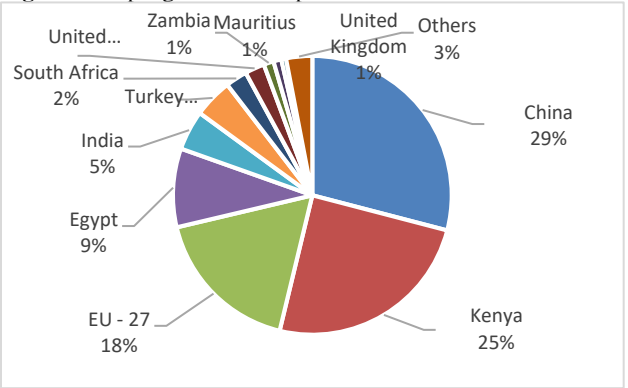
Rwanda is a growing economy with a young population and expanding retail sector that offers opportunities for U.S. agricultural and food exports. The country's increasing demand for safe, high-quality products coupled with the growth of modern retail and e-commerce platforms creates favorable entry points. However, exporters must navigate high tariffs, regulatory hurdles, and regional competition. This guide provides U.S. exporters with key insights into Rwanda's market landscape, identifies priority product opportunities, and outlines strategies to effectively navigate the business and regulatory environment.

Executive Summary

Rwanda is an East African country bordered by Uganda, Tanzania, Burundi, and the Democratic Republic of Congo. Administratively, the country is divided into five provinces: Northern, Southern, Eastern, Western, and Kigali City. Rwanda was estimated to have a population of approximately 13.6 million in 2024; there is a growing urban population concentrated in Kigali, the capital city, which had over 1.3 million residents in 2024. Rwanda's nominal GDP grew from \$14.1 billion in 2023 to approximately \$14.92 billion in 2024. Despite its small size and landlocked geography, Rwanda has made significant progress in economic development, governance, and infrastructure.

The country’s agricultural sector remains a cornerstone of the economy, employing more than 60 percent of the population. Rwanda has invested heavily in land consolidation, irrigation, and crop intensification programs. Despite these advancements, challenges remain in achieving full food security, improving productivity, and transforming agriculture into a value-added, competitive sector that contributes more significantly to exports and rural incomes.

Figure 1: Top Agricultural Exporters to Rwanda



Source: TDM, LLC

Retail Food Industry

The retail food industry is highly fragmented, primarily dominated by informal trade and open markets. Traditional shops and a mix of local and international retail chains also play a significant role in meeting consumer demand.

Modern retail outlets, such as supermarkets and convenience stores, remain limited but are steadily growing, particularly in hubs like Kigali, Gisenyi, Ruhengeri, Muhanga, and Nyagatare. This growth is fueled by an emerging middle class, rapid urbanization, and increasing consumer demand for organized retail options. The retail sector is poised for expansion, attracting interest from international and regional investors aiming to modernize the retail infrastructure and tap into its potential.

Food Service Industry

Rwanda’s food service industry is relatively small but steadily expanding, driven by rapid urbanization, population growth, and increasing demand for convenient dining options. The informal sector accounts for 92.6 percent of the market which includes small vendors, street food stalls, and local eateries serving traditional dishes. The formal sector comprises 7.4 percent including hotels, restaurants, cafes, and institutional catering services which are primarily concentrated in urban areas such as Kigali.

Food Processing Industry

Rwanda’s food processing industry is still developing, with much of the country’s food either imported or only minimally processed locally. The sector is composed of a limited number of formal businesses, most of which are small and medium-sized enterprises. Local food processing is primarily focused on staple crops such as corn, cassava, and beans. However, there is significant potential for growth in value addition, especially in fruits, vegetables, dairy, and other locally produced crops to meet rising domestic demand.

Quick Facts

Top Imported Products	
1. Fish	6. Dairy Products
2. Wheat	7. Sauce
3. Edible oils	
4. Malt	
5. Sugar	
Top Retailers	
1. Sawa City Supermarket	6. T-2000 Supermarket
2. Spar	7. Tuma250 Supermarket
3. La Galette	
4. Carrefour	
5. Simba Supermarket	
GDP/Population (2023)	
GDP \$14.1 billion	
GDP per capita \$1010.27	
Population 13.6 million	

Sources: Trade Data Monitor (TDM), World bank, IMF, and CIA Factbook

Market Assessment

Strengths	Weaknesses
<ul style="list-style-type: none">Improved ease of doing business through streamlined procedures for business registration and operations.Stable political environment and consistent policy.	<ul style="list-style-type: none">Reliance on neighboring countries for port access hence high cost of transport and trade.Smaller domestic market size may limit economies of scale for some large-scale investments.
Opportunities	Threats
<ul style="list-style-type: none">Expanding modern retail and hospitality sectors.High demand for safe, high-quality food products.	<ul style="list-style-type: none">Competition from regional exporters.Volatility in global commodity prices.

Section 1: Market Overview

Rwanda remains one of Africa's fastest growing economies, with an estimated real GDP growth rate of 6.6 percent in 2024 and a nominal GDP of \$14.92 billion. The government's long-term development framework, Vision 2050, emphasizes private sector led growth, industrialization, and modernization of key sectors such as agriculture.

Agriculture is the backbone of the Rwandan economy, employing over 60 percent of the population and contributing about 25 percent to GDP. Rwanda actively supports the importation of agricultural products that complement local production - particularly inputs and processed goods to address seasonal shortfalls and support the growing food industry.

Rwanda is strategically positioned within the East African Community, the Common Market for Eastern and Southern Africa, and the African Union. Reforms in customs and logistics have significantly improved import timelines and reduced costs, facilitating trade and regional market integration.

Rwanda's digital economy is rapidly expanding, driven by over 60 percent mobile internet penetration and continued government investment in information and communication technology infrastructure under Vision 2050. The country's e-commerce ecosystem is growing, with platforms like Vuba Vuba and Yubeyi offering online grocery delivery and retail services across urban centers. These platforms offer strategic entry points for U.S. food and agricultural exporters to reach Rwandan consumers via established digital logistics and payment systems.

The modernization of agriculture, growing urban consumer base, regional trade access, and digital retail expansion create favorable conditions for U.S. exporters of agricultural commodities, inputs, and value-added food products.

Key Economic Indicators (2023 est.):

- Nominal GDP: \$14.1 billion
- GDP growth rate 8.2 percent
- GDP per capita: \$1,010.27
- Urbanization Rate: 17.89 percent
- Inflation Rate: 9.2 percent
- Currency: Rwandan Franc (RWF) - (1 USD = 1,406.51 RWF)

Overview of U.S. Supplier Competitiveness

Strengths and market opportunities	Weaknesses and competitive threats
Receptive market due to low domestic production.	High tariffs, quotas, and regulations.
Preference of U.S. products due to high quality.	Lack of a bilateral agreement with the United States.
Rwanda has business friendly policies.	Fluctuations in exchange rates, economic downturns, and geopolitical tensions.
Rising disposable incomes are driving demand for quality goods, especially processed foods, health products, and technology.	Reliance on ports in neighboring countries makes shipping routes longer and more costly.

Section II: Exporter Business Tips

In Rwanda, building strong relationships is essential for successful business engagement. The local business culture places a high value on trust and long-term partnerships, making it important to invest time in getting to know your counterparts and establishing mutual rapport. This can be achieved through in-country visits and collaboration with local partners.

Exporters need to understand local market dynamics. Partnering with local businesses is crucial for navigating regulatory requirements and gaining insights into consumer preferences. The Rwandan government provides structured support through institutions such as the Rwanda Development Board (RDB), which offers valuable resources to facilitate smooth market entry. For example, exporters can use the RDB's One-Stop Center and the Online Services portal to complete all necessary business registration processes efficiently. Additionally, exporters can utilize the Rwanda Trade Portal, managed by the Rwanda Revenue Authority, which provides comprehensive, single-point access to user-centric information needed to trade in and out of Rwanda.

English is widely used in business; however, translation into Kinyarwanda or French can enhance communication and broaden your reach among local stakeholders.

Section III: Import Food Standards, Regulations and Procedures

Import Requirements

Imported food products must comply with [Rwanda Standards Board](#) regulations. There are some categories of goods that may require certification, permits, or sanitary and phytosanitary documentation.

Labeling Requirements

All food imports must be labeled in English or French, including product name, ingredients, expiration date, manufacturer, country of origin, and storage instructions.

Tariff Structure

Rwanda implements the East African Community [Common External Tariff](#) as part of its regional trade commitments. The government of Rwanda levies additional taxes on imported goods. These taxes are combined with tariffs, which range from 0 to 60 percent. The Value Added Tax is set at a fixed rate of 18 percent.

The EAC Common External Tariff structure has four main bands:

1. 0 percent for raw materials
2. 10 percent for intermediate goods
3. 25 percent for finished products
4. 35 percent for strategic commodities that are deemed critical for regional industrialization (e.g., textiles, footwear, processed agricultural products).

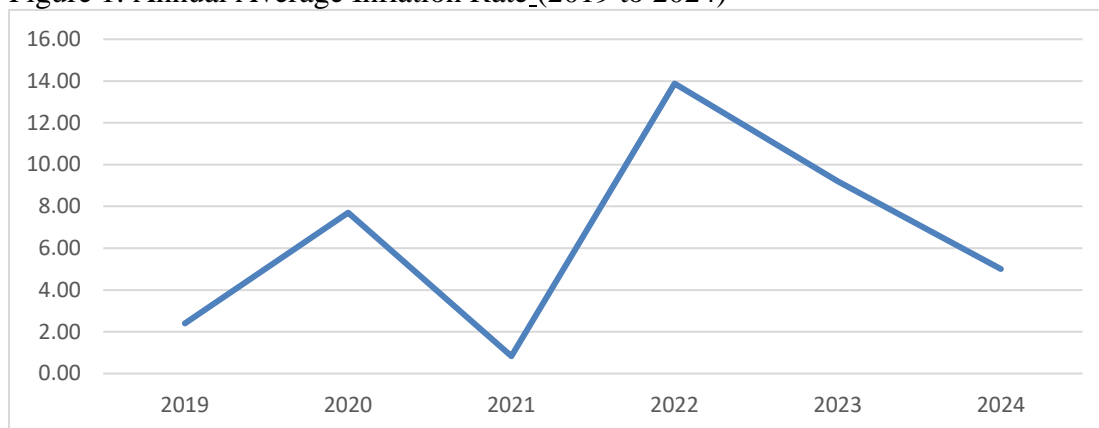
In addition, sensitive products such as poultry, dairy, and certain processed foods are subject to higher tariffs of up to 60 percent aimed at protecting domestic industries. Occasionally the government applies temporary exemptions or higher rates depending on national development priorities.

Standards

Compliance with Rwanda Standards Board requirements is mandatory for all imported food products. Relevant standards are available [online](#).

Section IV: Market Sector Structure and Trends

Figure 1: Annual Average Inflation Rate_(2019 to 2024)



Source: Rwanda National Institute of Statistics

Rwanda's inflation fluctuated significantly from 2019 to 2024 due to both global and regional economic pressures. After a modest 2.4 percent in 2019, inflation rose to 7.7 percent in 2020 amid pandemic related disruptions, then dropped to 0.8 percent in 2021 as conditions stabilized. However, inflation surged to 13.9 percent in 2022, driven by global commodity price rise, supply chain disruptions, and the economic impact of the Russia and Ukraine conflict.

In response, the National Bank of Rwanda implemented tighter monetary policy, contributing to a gradual decline in inflation. The rate dropped to 9.2 percent in 2023 and is estimated at 4.8 percent in 2024. This is supported by easing global prices and improved domestic food production. This decline brings inflation within the central bank's target range of 2 - 8 percent.

Top Performing Market Sectors

- **Retail Food Sector**
Rwanda's retail sector is moderately developed, with a mix of informal open markets and growing modern retail outlets. Informal vendors dominate rural and peri-urban areas, while supermarkets and convenience stores are expanding in urban centers, like Kigali. Local retail chains such as Simba, Sawa City, and Sharma Supermarket have introduced consumers to modern retail experiences.
- **Hotel, Restaurant, and Institutional Sector**
The food service sector is relatively small but steadily growing, driven by urbanization, tourism, and rising disposable incomes. Kigali hosts many restaurants, hotels, cafes, and catering services. The growing hospitality industry, linked to business travel and conferences, has expanded demand for high-quality imported food products, beverages, and ingredients.
- **Food Processing Sector**
Food processing in Rwanda remains underdeveloped, although there is a growing emphasis on value addition in key value chains such as corn, cassava, dairy, fruits, and vegetables. The sector is largely dominated by small and medium enterprises, but the government, private sector, and development agencies are investing in post-harvest infrastructure like storage facilities, improved packaging, and enhanced food safety standards, to boost competitiveness and reduce post-harvest loss.

Emerging Market Opportunities for Consumer Products

Rwanda's growing middle class, youthful population, rapid urbanization, and expanding retail sector present opportunities for U.S. consumer-oriented products. Consumers are increasingly demanding high value, convenient, safe, and health-conscious choices, creating a demand for high-quality U.S. food and beverage products. Below are the most promising categories. However, importers should note that tariffs and other duties may apply.

1. Dairy Products

Demand for processed and value-added dairy products continues to exceed Rwanda's local production capacity. In 2023, imports of milk and cream exceeded \$9 million, driven by the hospitality and food service sectors. U.S. milk powders and cheeses are well-positioned to meet this demand. Most dairy products are subject to a 60 percent import duty under the East African Community Common External Tariff. Import licenses are also required for dairy products.

2. Edible Oils

Rwanda imports over 90 percent of its edible oil needs. U.S. soybean and sunflower oils, especially refined and fortified varieties, are increasingly attractive due to health and nutrition. Key opportunities are in fortified soybean oil for consumers, bakeries and food processors. They can be used by people interested in healthier oils.

3. Poultry

Domestic poultry production in Rwanda is growing rapidly, however, it remains insufficient to meet the rising demand. In 2023, Rwanda imported over 4,000 metric tons of poultry meat primarily from Brazil, the United States, and Kenya. Frozen chicken parts, especially leg quarters and wings, are demand across both retail and foodservice markets, presenting an attractive entry point for U.S. exporters.

4. Snack Foods, Confectionery, and Beverages

Demand for snack foods, confectionery, and beverages continue to increase in Rwanda driven by the growing youthful population. Products such as chips, cookies, nuts, and candies are increasingly popular, due to their long shelf life and a wide range of flavors. Similarly, beverages including fruit juices, carbonated soft drinks, energy drinks, and waters are gaining traction.

5. Processed and Packaged Foods

The processed and packaged foods sector is rapidly expanding as modern consumption patterns take hold, particularly among young professionals and the growing middle class. There is increasing demand for ready-to-eat meals, instant noodles, frozen foods, and canned goods, driven by busy urban lifestyles. U.S. suppliers offering high-quality products with long shelf lives are well positioned to capitalize on this market opportunity.

Emerging Consumer and Market Trends in Rwanda's Food Sector

There are recent shifts in consumer behavior and market dynamics that are creating new opportunities for exporters in Rwanda. Key trends include:

1. Shift toward ready-to-eat foods:

Urbanization and increasing household incomes are driving demand for packaged, and convenient food options. As time-constrained consumers seek faster meal solutions, the market for ready to eat and easy to prepare products is expanding. Exporters of high-quality, long-shelf-life foods are well-positioned to capitalize on this trend.

2. Growth of modern retail channels:

The rise of supermarket chains and other modern retail outlets is transforming the distribution landscape in Rwanda. These outlets provide structured, reliable channels for imported products and enhance the visibility of premium and specialty food items, contributing to increased consumer trust and accessibility.

3. Rise of e-commerce platforms:

Digital commerce is gaining momentum, with platforms such as Yubeyi facilitating online purchases and home delivery. These platforms cater to a growing base of tech-savvy, urban consumers and present exporters with alternative avenues for market entry and product distribution.

4. Rising demand for health-oriented products:

There is growing consumer interest in health-conscious, organic, and fortified foods, driven by interest in nutrition and wellness. Products promoting health benefits are gaining popularity, especially in urban markets.

Key Retailers and Sector Growth

Rwanda's retail sector has been expanding steadily, driven by rapid urbanization, a growing middle class, and supportive government policies that promote trade and infrastructure development. Investments in information communication and technology and digital platforms have enabled the growth of e-commerce services, such as Vuba Vuba, supported by improvements in mobile payments, delivery apps, and digital marketplaces. The government has also invested significantly in broadband infrastructure to accelerate digital retail growth. The retail environment includes a mix of modern supermarkets, mini-markets, neighborhood shops, and traditional open-air markets, reflecting both formal and informal retail channels.

Key retailers in Rwanda include:

- Simba Supermarket - A prominent local chain with multiple outlets in Kigali and other major towns. It is known for a broad range of imported and local products.
- Sawa Citi - This is a well-established supermarket offering a mix of household items, groceries, and imported food products.
- Carrefour - Recently entered the Rwandan market through a franchise partnership with CFAO, introducing international retail standards and a wider product variety.

Growth Trends:

Retailers and hospitality outlets demand a variety of food products, particularly frozen poultry, dairy products, processed and packaged foods, juices and beverages, as well as condiments and sauces. This trend reflects shifting consumer preferences toward convenience, quality, and a wider selection of imported and locally available goods.

Section V: Agricultural and Food Imports

Rwanda's agricultural and food import sectors continue to expand, driven by population growth, rapid urbanization, and evolving consumer preferences. Among the fastest-growing segments are:

Cereals

Cereals, particularly rice, wheat, and corn represent one of the fastest-growing import categories. Rwanda remains reliant on imports. Opportunities exist for exporters to supply bulk grains, as well as investing in local grain storage, milling, and processing infrastructure to reduce post-harvest losses and enhance food security.

Processed Foods

Rwanda's processed food imports are growing rapidly. This growth is driven by a young population and shifting dietary preferences. Urban consumers, particularly in Kigali, are increasingly seeking convenience foods such as ready-to-eat meals, snacks, canned foods, and beverages. This trend presents opportunities for U.S. exporters of branded, high-quality processed foods.

Edible Oils

The edible oil and fats market has also experienced robust growth. Rising household consumption and expanding food processing industries have driven demand for palm, sunflower, and soybean oil. While palm oil dominates the market, there is growing consumer interest in healthier and fortified alternatives, creating opportunities for exporters of refined, branded, and nutritionally enhanced oils.

Poultry

The poultry sector is expanding steadily, with increasing imports of frozen chicken, chicken parts, and table eggs. Exporters can tap into opportunities to supply pre-packaged, processed poultry products and to build partnerships with local distributors and cold chain logistics firms, particularly in Kigali and other urban centers.

Dairy

Dairy products, including milk powder, cheese, and butter are also in high demand. Urban dietary shifts and a rising middle class are contributing to steady growth in this sector. Milk powder continues to be a key import, valued for its extended shelf life, ease of transport, and broad applicability while cheese and butter are increasingly popular among urban consumers and the hospitality industry. There are prospects for exporters offering fortified dairy options and specialty products aligned with health-conscious trends.

Section VI: Key Contact and Further Information

- **National Agricultural Export Development Board**
Address: KK 530 Street, Gikondo, Kigali, Rwanda
P.O. Box: 104 Kigali
Phone: +250 252 575 600
Email: info@naeb.gov.rw
<https://www.naeb.gov.rw>
- **Ministry of Agriculture and Animal Resources**
Address: KG 569 Street, Kigali, Rwanda
P.O. Box: 621 Kigali
Phone: +250 252 585 053
Email: info@minagri.gov.rw
<https://www.minagri.gov.rw>
- **Rwanda Development Board**
Address: RDB Building, 1 KG 9 Avenue, Kigali, Rwanda
P.O. Box: 6239 Kigali
Phone: +250 727 775 170
Email: info@rdb.rw
<https://rdb.rw>
- **Rwanda Standards Board**
Address: KK 15 Road, No. 49, Kicukiro, Kigali, Rwanda
P.O. Box: 7099 Kigali-Kicukiro
Phone: +250 788 303 492
Email: info@rsb.gov.rw
<https://www.rsb.gov.rw>
- **Rwanda Revenue Authority**
Address: KG 4 Avenue 8, Kimihurura, Kigali, Rwanda
P.O. Box: 3987 Kigali
Phone: +250 252 595 500
Email: info@rra.gov.rw
<https://www.rra.gov.rw>

Contact Information

- **U. S. Embassy in Kigali**
Address: 30 KG 7 Avenue (Kacyiru)
P.O. Box 28 Kigali, Rwanda
- **U. S. Embassy Nairobi - Office of Agricultural Affairs**
Address: U.N. Avenue, Nairobi Kenya
Email: agnairobi@usda.gov
Website: <http://www.fas.usda.gov>

Appendix

Table 1: Top Global Exporters of Agricultural and Related Products to Rwanda in USD

Country	2019	2020	2021	2022	2023	2024
China	30,510,941	49,396,984	78,270,017	74,357,092	73,931,437	93,170,644
Kenya	46,066,449	52,860,285	69,299,780	91,032,705	60,557,428	79,256,274
EU - 27	34,797,860	31,449,737	38,864,691	56,493,721	54,990,328	56,219,654
Egypt	11,624,522	15,286,991	24,322,110	35,906,627	34,214,415	29,267,335
India	7,291,960	16,801,010	23,750,472	30,299,639	25,471,179	14,788,654
Turkey	6,442,774	5,810,811	12,391,211	12,834,967	13,715,291	14,490,859
South Africa	4,912,368	6,056,183	4,026,122	9,773,367	4,202,380	8,052,020
United States	3,189,093	1,785,881	4,806,982	6,755,445	4,378,653	7,284,765
Zambia	12,218,196	8,447,719	6,548,625	19,873,765	11,841,159	3,723,822
Mauritius	62,792	51,500	49,597	744,739	140,381	2,937,848
United Kingdom	694,712	294,358	1,528,659	1,486,290	1,581,847	1,754,019
Japan	-	2,293,221	4,835,274	2,722,856	1,265,253	1,586,945
Brazil	44,891	35,736	198,523	777,870	978,614	1,065,686
Ukraine	2,623,245	1,114,176	879,220	514,251	395,521	1,035,934
Canada	4,317,501	326,282	1,083,936	1,463,781	3,421,632	1,032,377

Source: TDM, LLC

Attachments:

No Attachments.