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Prepared By: Carol Kamau and Matthew Snyder

Approved By: Ryan Scott

Report Highlights:

Kenya's imports of consumer-oriented food products grew at an average annual rate of 9.6 percent between 2016 and 2020. This increase was fueled by a growing middle class with rising disposable income, increased urbanization, and expanding modern food retail and food service sectors. U.S. exports to Kenya shrunk by 11 percent within the same period. For U.S. exporters, the best prospective products include snack foods, sauces and condiments, pasta and processed cereals, distilled spirits and other alcoholic drinks, dairy products, tree nuts, and pet food.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Market Fact Sheet: Kenya

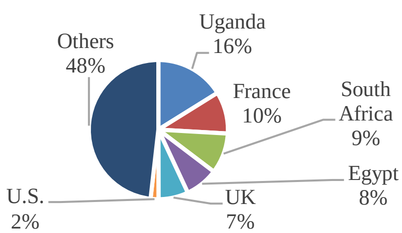
Executive Summary

Kenya is East Africa's economic powerhouse with a strong financial sector and a relatively well-developed logistics network making it a regional hub. Kenya is a net importer of agricultural products. Agricultural product exports to Kenya increased at an annual average rate of 10.3 percent between 2016 and 2020, reaching $2.70 billion in 2020. A fast-growing population and middle class and an expanding food service and modern food retail sector offer opportunities for U.S. exporters.

Imports of Consumer-Oriented Products

Kenya imported consumer-oriented products valued at $463 million in 2020. Uganda, Europe, South Africa, and Egypt were Kenya's major suppliers with the United States supplying 1.8 percent of total imports

Kenyan Consumer-Oriented Products Imports, 2020



Food Processing Industry

Kenya's manufacturing sector slowed in 2020 due to Covid-19. The food processing sector declined by 1.0 percent. Sub-sectors that suffered notable 2020 contractions include coffee (-12.6%), beverages (-16.7%), dairy products (-5.7%), and bakery products (-3.5%). Sugar and tea manufacturing rose 36.9% and 22.8%, respectively.

Food Retail Industry

Modern grocery retailers stock most imported consumer-oriented high value products. The sector's retail sales declined by 8 percent in 2020 to $1.7 billion but are expected to grow 7 percent annually to reach $2.5 billion by 2025, according to Euromonitor International. An expanding middle class with rising disposable income, increased urbanization, and rapid growth in eCommerce will largely drive this growth. Most of Kenya's major food retail chains have developed an online presence through partnerships with online firms like Jumia, Glovo, Copia, and Uber Eats.

Quick Facts CY 2020

Imports of Consumer-Oriented Products: *$463 million*

Top Growth Products in Kenya

1) Snack foods (baked snack foods, mixes of nuts and fruits, potato chips, and prepared peanuts and peanut butter).
2) Sauces, condiments, jams, and jellies.
3) Pasta and processed cereals (e.g., breakfast cereals).
4) Distilled spirits, wine, and beer.
5) Tree nuts (almonds, pistachios, walnuts, pecans, and others).

Food Industry by Channels (U.S. billion) 2020

Food Industry Output	$4.4 Billion
Food Exports	$491.3 Million
Food Imports	$754.3 Million
Inventory	No credible data available
Domestic Market	$8.2 Billion
Retail	$7.4 Billion
Food Service	$746.1 Million
Wet Market	No credible data available

Food Industry Gross Sales: *$8.2 Billion*

Top Host Country Retailers (by number of outlets)

1) Naivas (78)	2) Quickmatt (46)
3) Chandarana FoodPlus (22)	4) Carrefour (16)
5) Cleanshelf (12)	6) Eastmatt (9)
7) Maathai (8)	8) Game Stores (3)

GDP/Population in 2020

Population *(millions)*: 53.8 million
GDP (Nominal): $101 billion
GDP per capita (ppp): $4,793

Strengths	**Weaknesses**
Dynamic, market-based economy. *Rapidly devloping online retail presence.*	*Price-based purchasing desicions.* *High shipping costs for U.S. exporters.*
Opportunities	**Threats**
Regional hub for six East Africa countries. *Local importers, distributors, and consumers, have a limited awareness of U.S. food products.*	*Strong competition from EU, regional countries, and local industry.*

Data and Information Sources: Kenya Economic Survey 2021, Euromonitor International (2020), Economist Intelligence Unit, World Bank, newspaper articles, and market reports.

Section I: Market Overview

Advantages	Challenges
Kenya's strategic location in East Africa makes it a trade hub in east and central Africa.	U.S. suppliers face stiff competition from Uganda, South Africa, Egypt, Europe, and India due to geographical advantages. East African Community (EAC) and COMESA member states have a preferential tariff advantage.
U.S. food products are associated with premium quality and have a positive image in the Kenya and East Africa market.	The current import ban on genetically engineered foods and their derivatives blocks key U.S. agricultural products.
Kenya has a vibrant and diversified private sector and consumer spending is expected to increase.	Kenyan consumers, importers, retailers, and processors have limited awareness of U.S. agricultural and food products.
Prior to COVID-19, Kenya had an expanding modern food retail sector, food service sector, and food processing sector.	U.S. suppliers face higher transportation costs than suppliers in South Africa and Europe.
An emerging eating-out culture in Kenya's middle class is driving growth in fast food outlets, restaurants, and coffee shops. This is expected to continue as the economy recovers from COVID-19.	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 ecommerce sector.	

The following table summarizes Kenya's key economic trends:

Economic Trends	2016	2017	2018	2019	2020	2021[E]	2022[F]
Population (million)[1]	49.1	50.2	51.4	52.6	53.8	55.0	56.2
Formal Sector Employment (million)[2]	2.80	2.90	3.0	3.1	2.9	3.0	3.1
Informal Sector Employment (million)[2]	12.7	13.5	14.3	15.1	14.5	15.0	15.1
Public Sector Employment ('000s)[2]	774.7	833.1	842.9	865.2	884.6	890.0	900.0
Nominal Gross Domestic Product (GDP) (in million US$)[3]	74,815	82,036	92,203	100,550	101,014	108,000	117,000
GDP per capita (US$ at PPP)[4]	3,635	4,204	4,522	4,752	4,550	4,793	5,035
Real GDP growth rate (%)[1]	5.9	4.8	6.3	5.4	0.3	4.1	4.3
Inflation (% change)[1]	6.3	8.0	4.7	5.2	5.3	6.0	6.1
Exchange Rate Kshs: US$(end-period)[1]	101.50	103.46	101.85	101.99	106.44	110.00	112.00

Data Sources: [1]Euromonitor International; [2]Economic Survey, 2021; [3]World Bank, [4]EIU/IMF estimates; and [E, F]FAS/Nairobi estimates and forecasts based on trendline analysis.

Kenya's overall population is forecast to grow at an annual average rate of 2.2 percent between 2021 and 2025 and reach 60 million by 2025, according to the Economist Intelligent Unit (EIU). In 2020, the economy registered very little growth, increasing .46 percent to $101 billion due to the coronavirus pandemic disruption, drought in key agricultural areas, and a locust invasion that damaged field crops. Prior to 2020, Kenya's economy grew at rapid clip, increasing on average 8 percent per year from 2015 to 2019.

Key Demographics

Kenya's rising urban population remains the largest and fastest growing consumer market for high-value consumer-oriented foods. According to the World Bank, urbanization is growing at an annual average rate of 4 percent against a global average of 1.9 percent. Nairobi is the country's political, economic, and financial center with an estimated population 4.7 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, 2016-2022.

	2016	**2017**	**2018**	**2019**	**2020**	**2021[E]**	**2022[F]**
Urban population (million)	12.8	13.4	13.9	14.5	15.1	16.0	16.5
Urban population (%)	26.1	26.6	27.1	27.5	28.0	28.5	29.0
Population aged 0-14 (%)	40.9	40.4	39.8	39.2	38.6	39.0	40.0
Population aged 15-64 (%)	56.9	57.4	57.9	58.4	58.9	59.5	60.0
Population aged 65+ (%)	2.2	2.3	2.3	2.4	2.5	2.6	2.7
Male population (%)	49.7	49.7	49.7	49.7	49.7	49.7	49.7
Female population (%)	50.3	50.3	50.3	50.3	50.3	50.3	50.3
Life expectancy male (years)	63.0	63.5	64.0	64.3	64.6	65.0	65.3
Life expectancy female (years)	67.7	68.2	68.7	69.0	69.4	70.0	70.4
Adult literacy (%)	79.4	80.5	81.5	81.6	81.7	81.8	82.0

Data source: Euromonitor International, 2021, [E, F]FAS/Nairobi estimates and forecasts based on trendline analysis.

Section II: Exporter Business Tips

Local Business Customs and Trends

In general, Kenya 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. Kenya 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 ensure the Kenya buyer is continuously updated on changes in shipping schedules and routing. It is better to quote a later delivery date that can be guaranteed than an earlier one that is uncertain. Since Kenya importers generally do a lower volume of business, U.S. exporters should be ready to sell smaller volumes.

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 importers apprised of new developments and help in quickly resolving problems. Vigorous and sustained promotion is needed to launch new products.

General Consumer Tastes and Preferences and Trends

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

Kenyan food retailers stock a wide range of products to meet a diverse set of 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 other similar products. Many U.S. brands like Kraft Foods, Heinz, General Mills, Post, and Betty Crocker 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' brand have penetrated Kenya's modern food retailing market and have significant market share in certain food categories like peanut butter, sauces, and condiments.

Section III: Import Food Standards & Regulations and Import 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). Review more information at: *2021 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 Kenyan import requirements, as evaluated by a government appointed pre-shipment inspection (PSI) company. Imports from the United States are inspected and certified by the Société Générale of Surveillance (SGS), Intertek International Ltd., or Bureau Veritas. Once the PSI company has issued a CoC, 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.

Country Language Labeling Requirements

English is required on all Kenya labeling. Labeling combining English with other languages is permitted.

The GOK has implemented mandatory labeling of all food containing or derived from genetically modified organisms ("GMOs").

More information is available at: *2020 FAIRS Country Report*.

Tariffs and FTAs

Kenya generally follows the external common tariffs of the East African Community (EAC). Effective January 2005, the EAC adopted a three-tier system for assessing import duties: raw materials at 0 percent, processed or manufactured inputs at 10 percent, and finished products at 25 percent. Several food items are considered sensitive (see Schedule 2 Category in the EAC Common External Tariff Book for more details) and are subject to higher import duties. These include powdered milk and dairy products (60 percent), corn (50 percent), rice (75 percent), wheat (35 percent), wheat flour (60 percent), and sugar (100 percent). The full EAC tariff book is available here.

In addition to an import duty, there are additional charges associated with shipping to Kenya. These include a 3.5 percent Import Declaration Fee (IDF), 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.

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 which includes Uganda, Tanzania, South Sudan, Rwanda, and Burundi. Kenya is also a member of the Common Market for Eastern and Southern Africa (COMESA) alongside Burundi, Comoros, the Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Ethiopia, Libya, Madagascar, Mauritius, Rwanda, Seychelles, Sudan, Swaziland, Uganda, Zambia, and Zimbabwe.

Documents Generally Required by the Kenyan Government for Imported Food

See below a list of documentation and certification requirements necessary to export food products to Kenya:

Pre-Shipment Documents

- Plant Import Permit (PIP) for bulk commodities issued by the Kenya Plant Health Inspectorate Service (KEPHIS). The PIP form can be found at KEPHIS FORMS.
- Import Declaration Form (IDF) issued by the Kenya Revenue Authority (KRA) found at KRA Forms.

Post-Shipment Documents

- Certificate of Conformity (CoC).
- Phytosanitary Certificate (PC) containing required additional declarations for bulk commodities (corn, wheat, pulses, rice, sorghum, barley, etc.).

- Non-Genetically Modified Organisms (GMO) Certificate.
- Bill of Lading (three original B/Ls 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 *2021 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 government that protects and promotes intellectual property rights including trademarks and patents. Find more specific information on at KIPI and *2020 FAIRS Country Report*.

Section IV: Market Sector Structure and Trends

Food Retail Sector

Kenya's retail food sector continues to expand as a result of population growth, increased urbanization, rising middle class purchasing power, investment in modern retail space and shopping malls, and entry of foreign brands, producers, and retailers (such as Carrefour and Game Store) into the market. In 2020, the value of sales in modern and traditional grocery retailers declined by 8 percent to reach $5.7 billion. The sector is forecasted to grow at a compound annual growth rate (CAGR) of 7 percent to reach $2.5 billion by 2025, according to a Euromonitor International 2020 country report. Retailers attract customers through a variety of product promotions and convenience services including 24-hour operations, customer loyalty shopping cards, and special offers. In addition, key retailers have adopted online retailing and partnered with delivery service companies to better service their customers. Local producers and importers of consumer-oriented products use in-store promotions, weekend and/or holiday discounts, billboards, brochures, and/or flyers to advertise products.

Food Processing Sector

Kenya’s food manufacturing sector contracted by 1 percent in 2020 compared to 3.2 percent growth in 2019 largely due to the Covid-19 pandemic and associated containment measures taken by the Kenyan government.

U.S. suppliers of food ingredients may, from time-to-time, 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, wheat, and rice.

Hotels, Restaurants, and Institutions (HRI)
International fast food chain outlets such as Kentucky Fried Chicken (KFC), Subway Ltd., Domino’s Pizza, and Cold Stone Creamery have been established in Kenya. American pizzeria, Papa John’s International, plans to open four restaurants in 2022 in Sub-Saharan Africa beginning with Nairobi.

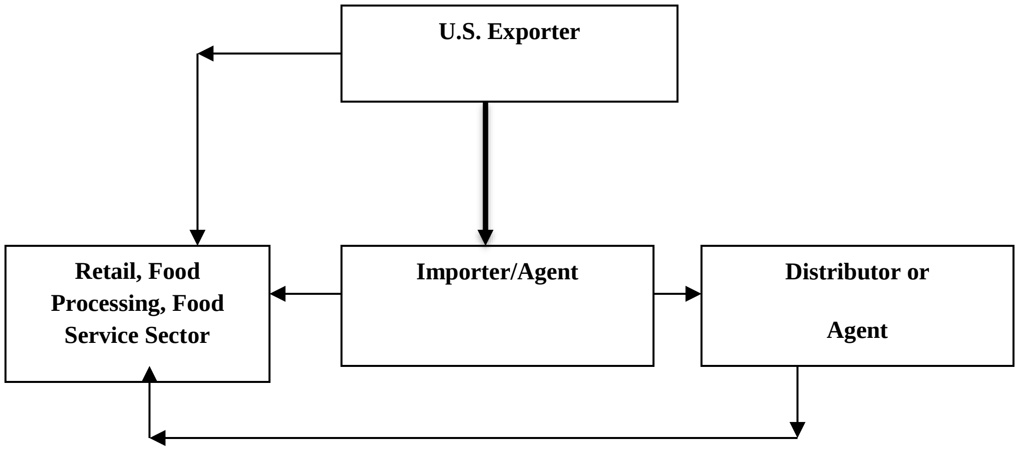
International hotel brands such as the Best Western Group, Villa Rosa Kempinski, Crowne Plaza, the Marriot Group, Dusit2 International, and Accor have also entered the Kenyan market. Nairobi’s prominence as a business and conferencing center has driven this expansion. Twenty new hotels are expected to add 3,444 hotel rooms in Kenya between 2018 and 2023, according to the 2018 Pipeline report released by W. Hospitality.

Distribution Channel

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.

Kenya food processors and importers collaborate with USDA cooperators to develop markets for U.S. food ingredients. These cooperators include the World Initiative for Soy in Human Health, the U.S. Soybean Export Council, the U.S. Dry Bean Council, the USA Dry Pea and Lentil Council, the American Peanut Council, U.S. Wheat Associates, and the U.S. Grains Council. Market development activities include in-country technical seminars, trade servicing visits, and short-term specialized training in the United States.

The following chart summarizes how U.S. food products reach Kenya’s retail, food service, and food processing sectors:



Best Consumer-Oriented Product Prospects Based on Growth Trends in 2020

Product Category/*HS Code*	**[1]Market Size (Volume 2020) ** Metric Tons**	**[1]Import Value (2020)**	**[1]5-Year Annual Import Growth Rate (%) 2016-2020**	**[2]Import Tariff Rate (%) 2020**	**Key Constraints For Market Development**	**Market Attractiveness for USA**
Snack foods (baked goods, mixes of nuts and fruits, potato chips, and prepared peanuts and peanut butter)	11,180	$20.7 million	21.6%	25%	High landed costs and competition from Argentina, India, Egypt, and the United Kingdom (UK).	Good growth potential. U.S. brands perceived as high quality, premium brands.
Dairy products	107,128	$111.0 million	9.6%	25%	High landed costs and competition from duty-free imports from Uganda and Rwanda.	Good growth potential.
Pasta and processed cereals	51,445	$26.6 million	11%	25%	High landed costs and competition from Egypt, Turkey, Iran, and the UK.	Good growth potential.
Sauces, condiments, jams, and jellies	Data split between tons and liters	$9.7 million	12.3%	25%	Competition from low-cost suppliers such as Egypt, South Africa, China, and Indonesia.	Good growth potential.

Pet food (for dogs and cats) *HS Code:230910*	2,264	$3.12 million	8.9%	25%	High landed costs and competition from Turkey, South Africa, and Germany.	Good growth potential.
Distilled spirits and other alcoholic beverages (excluding wine and beer)	15.14 million liters	$50.6 million	14%	25%	Competition from United Kingdom, South Africa, Tanzania, and France.	Good growth potential.
Wine and beer	14.4 million liters	$23.6 million	2.9%	25%	Competition from South Africa, Europe, and Chile.	Good growth potential.
Tree nuts	793	$2.2 million	6.6%	25% and 10 % for almonds in shell.	Competition from India for almonds and walnuts. Competition from Tanzania and Mozambique for cashews.	Good growth potential.

Data sources: [1]Trade Data Monitor (TDM); [2]East Africa Community Tariff Book; **Reflects import volumes only

Best Ingredient Prospects Based on Growth Trends in 2020

Product Category/*HS Code*	**[1]Market Size – 2020 (Volume) Metric Tons**	**[1]Imports (2020) (<u>$1,000</u>)**	**[1]5-Year Average Annual Import Growth Rate (%) (2016-2020)**	**[2]Import Tariff Rate (%) (2020)**	**Key Constraints Over Market Development**	**Market Attractiveness for USA**
Wheat	1.88 million	$455,834	13%	10% for registered millers and 35% for traders	Competition from low-cost suppliers of hard wheat such as Russia, Argentina, Germany Ukraine, Canada.	U.S. hard wheat considered high quality and used for blending with cheaper wheat. U.S. soft wheats also have good market potential.
Soy-based protein concentrates and textured protein substances *HS Code: 210610*	655	$1,723	2.3%	10%	Competition from low-cost suppliers such as China, Belgium, and Turkey. Ban on biotechnology products.	U.S. ingredients are considered high quality.
Milk and cream (sweetened) *HS Code:040120*	2,861	$44,483	43.8%	60%	Government support for domestic industry and competition from low-cost	Good growth potential.

					suppliers such as Uganda, Rwanda, Belgium, and Thailand.	
Fats and oils	1.2 million	$857,093	13.9%	25%	Competition from low-cost suppliers such as Indonesia and Malaysia.	Good growth potential.

Data Source: Trade Data Monitor

More specific retail information can be found at:

- Quickmart Supermarkets Ltd.
- Carrefour Supermarkets Kenya
- Chandarana Food Plus
- Game Store
- Naivas Supermarkets
- Retail Trade Association of Kenya

Section V: Agricultural and Food Imports

Agricultural Products Imports	2016	2017	2018	2019	2020	2021[E]	2022[F]
Total agricultural product imports from the World (in million $US)	1,828	3,239	2,613	2,607	2,701	2,932	3,040
Total agricultural products imports from the United States (in million $US)	71	87	53	78	32	38	40
Total agricultural and related products imports from the United States in million $US)	71	88	54	78	32	38	40
Total import of consumer-oriented foods and seafood products from the world (in million $US)	344	477	504	527	483	575	610
Total Imports of consumer-oriented foods and seafood products from the United States (in million $US)	13	12	9	8	8.50	9.0	9.5

Data Source: TDM.

Information on U.S agricultural exports to Kenya for all categories including bulk, intermediate, and consumer-oriented products may be found here.

Section VI: Key Contacts and Further Information

Office of Agricultural Affairs, Embassy of the United States of America
United Nations Avenue, Gigiri
P.O. Box 606 Village Market 00621 Nairobi, Kenya
Tel: 254-20-3636340
Email: Agnairobi@usda.gov
www.fas.usda.gov

Foreign Commercial Service, Embassy of the United States of America
United Nations Avenue, Gigiri
P.O. Box 606 Village Market 00621 Nairobi, Kenya
Tel: 254-20-3636424
Email: office.nairobi@trade.gov
www.buyusa.gov/kenya

Kenya Bureau of Standards (KEBS)
P.O. Box 54974 Nairobi, Kenya
Tel: 254-20-6948000 or 69028201/401/410
Email: info@kebs.org
www.kebs.org

Customs and Excise Department
Kenya Revenue Authority
P. O. Box 48240 – 00100
Tel: +254 20 281 0000
https://www.kentrade.go.ke/ and www.kra.go.ke

Kenya Plant Health Inspectorate Service (KEPHIS)
P.O. Box 49592 Nairobi, Kenya
Tel: 254-20-020 661 8000
Mobile: +254 709 891 000
Email: director@kephis.org
www.kephis.org

Department of Veterinary Services (DVS)
P.O. Private Bag 00625 Kabete, Kenya
Tel: 254-20-8043441631383/2231/1287
Cell: 254-722376237
Email: veterinarydepartment@yahoo.com
https://www.kilimo.go.ke/management/state-department-of-livestock/

Ministry of Health
Public Health Department
P.O. Box 30016-00100 Nairobi, Kenya
Tel: 254-20-2717077http://www.health.go.ke/

SGS North America Inc.
201 Route 17 North
7th and 8th Floors
Rutherford, New Jersey,07070
United States
Tel: +1 201 508 3000
https://www.sgsgroup.us.com/

Intertek International
Tel: 305 513 3000
www.intertek-gs.com/contactintertek/namerica/

Bureau Veritas Kenya
First Floor, ABC Place, - Waiyaki Way
Westlands, Nairobi
Tel: + 254 20 366 9000
www.bureauveritas.com/home/worldwide-locations/africa/kenya/

National Biosafety Authority (NBA)
P.O. Box 28251 – 00100 Nairobi
Tel: +254 20 2678667/+254 713854132
Email: info@biosafetykenya.go.ke
https://www.biosafetykenya.go.ke/

Attachments:

No Attachments