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**Report Highlights:**

Kenya's consumer-oriented food imports increased 9 percent to \$529 million in 2022. This increase was fueled by a positive economic recovery from COVID-19-related disruptions, a sound macroeconomic environment, and a shift in consumer preferences towards convenience, variety, and international cuisines. For U.S. exporters, the best prospective products include tree nuts, snack foods, pet food, sauces and condiments, and distilled spirits.

# Market Fact Sheet: Kenya

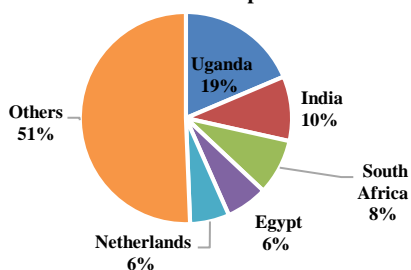
## Executive Summary

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 and related product exports to Kenya reached \$3.78 billion in 2022, an increase of 11 percent from 2021. Kenya's fast-growing population and middle class combined with an expanding food service and retail sector offer many opportunities for U.S. exporters.

## Imports of Consumer-Oriented Products

Kenya imported consumer-oriented products valued at \$529 million in 2022. Uganda, India, Europe, South Africa, and Egypt were Kenya's major suppliers with the United States providing 1.9 percent of total imports.

Kenya's Consumer-Oriented Imports in 2022



## Food Processing Industry

Kenya's manufacturing sector declined 2.7 percent in 2022, compared to a 7.3 percent increase in 2021. Due to drought-related shortfalls in raw materials, manufactured and processed food production increased only 1 percent in 2022 compared to 3 percent growth in 2021. Sub-sectors with the highest growth rates include: fish (15.6 percent), sugar processing (13.8 percent), meat and meat products (6.4 percent), bakery products (6.3 percent), and prepared and preserved fruits and vegetables (5.3 percent). Dairy product processing declined 8.4 percent while animal and vegetable oil production declined by 9.4 percent.

## Food Retail Industry

Kenya's retail landscape is a mix of traditional, informal retailers and modern grocery channels which stock most imported consumer-oriented high value products. Grocery retail sales grew 11 percent in 2022 to reach \$8.5 billion and are expected to grow at 10 percent CAGR from 2022 to 2027, according to Euromonitor International. Growth in Kenya's ecommerce sector has prompted most retailers to partner with online delivery firms like Glovo, Copia, and Uber Eats.

## Quick Facts CY 2022

**Imports of Consumer-Oriented Products: \$529 million**

### Top Growth Products in Kenya

- 1) Tree nuts (almonds, pistachios, walnuts, pecans, and others).
- 2) Snack foods (baked snack foods, mixes of nuts and fruits, potato chips, and prepared peanuts and peanut butter).
- 3) Pet food.
- 4) Sauces, condiments, jams, and jellies.
- 5) Distilled spirits.

### Food Industry by Channels (U.S. billion) 2022

Food Industry Output	\$3.9 billion
Food Exports	\$2.9 billion
Food Imports	\$2.2 billion
Inventory	No credible data available
Domestic Market	No credible data available
Retail	\$9.6 billion
Food Service and Accommodation	\$3.2 billion
Wet Market	No credible data available

### Top Host Country Retailers (by number of outlets)

- 1) Naivas (101)
- 2) Quickmatt (59)
- 3) Chandarana FoodPlus (26)
- 4) Carrefour (22)
- 5) Cleanshelf (13)
- 6) Eastmatt (9)
- 7) Maathai (11)

### GDP/Population in 2022

Population (millions): 50.6 million  
 GDP (Nominal): \$113.7 billion  
 GDP per capita (ppp): \$5,209

**Data and Information Sources:** Kenya Economic Survey 2023, Euromonitor International (2022), IMF Data, newspaper articles, and market reports.

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

## Section I: Market Overview

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

The following table summarizes Kenya's key economic trends:

Economic Trends	2018	2019	2020	2021	2022	2023 <sup>E</sup>	2024 <sup>F</sup>
Population (million) <sup>1</sup>	46.4	47.6	48.8	49.8	50.6	51.5	52.4
Formal Sector Employment (million) <sup>1</sup>	3.0	3.1	2.9	3.1	3.2	3.3	3.4
Informal Sector Employment (million) <sup>1</sup>	14.3	15.1	14.5	15.3	16.0	16.5	17.0
Public Sector Employment ('000s) <sup>1</sup>	842.7	865.2	884.6	923.1	938	940	945
Nominal Gross Domestic Product (GDP) (in billion US\$) <sup>2</sup>	\$92.2	\$100.4	\$100.9	\$109.9	\$113.1	\$112.8	\$115.1
GDP per capita (US\$ at PPP) <sup>2</sup>	\$4,808	\$4,926	\$4,793	\$5,058	\$5,209	\$5,373	\$5,558
Real GDP growth rate (%) <sup>2</sup>	5.7%	5.1%	- 0.3%	7.6%	4.8%	5.0%	5.5%
Inflation (% change) <sup>2</sup>	4.7%	5.2%	5.3%	6.1%	7.6%	7.7%	6.6%
Exchange Rate Kshs: US\$(end-period) <sup>2</sup>	101.3	102	106.5	109.7	117.9	153.1	155

**Data Sources:** <sup>1</sup>Economic Survey, 2023; <sup>2</sup>World Economic Outlook Database: October 2023; and <sup>E, F</sup>FAS/Nairobi estimates and forecasts based on trendline analysis.

Kenya's population is forecast to grow at an average annual rate of 2.2 percent between 2022 and 2025 and reach 60 million by 2025, according to the Economist Intelligence Unit (EIU). In 2022, the economy continued to improve with GDP increasing to \$113 billion from \$110 billion in 2021. Recovery from COVID-19-related impacts and a sound macroeconomic environment contributed to the increased growth. However, Kenya's agricultural output was negatively affected by an extended drought and the Ukraine/Russia war which led to disruptions to global supply chains.

### **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, Kenya's urban population is growing at an annual average rate of 3.7 percent against a global average of 1.9 percent. Nairobi is the country's political, economic, and financial center with an estimated population of 5 million. Nairobi's high concentration of consumers, combined with the city's commercial power, makes it Kenya's most important market, followed by Mombasa, Kisumu, Nakuru, and Eldoret.

The following table summarizes Kenya's urban population by age groups, 2016-2022.

	2019	2020	2021	2022	2023 <sup>E</sup>	2024 <sup>F</sup>
Urban population (million)	14.0	14.6	15.1	15.6	16.2	16.7
Urban population (%)	27.5	28.0	28.5	29.0	29.5	30.0
Population aged 0-14 (%)	39.5	39	39.5	40.0	40.1	40.2
Population aged 15-64 (%)	57.7	58.2	59.1	59.5	60.2	60.8
Population aged 65+ (%)	2.8	2.8	2.9	3.0	3.1	3.2
Male population (%)	49.6	49.6	49.6	49.6	49.6	49.6
Female population (%)	50.4	50.4	50.4	50.4	50.4	50.4
Life expectancy male (years)	60.7	60.4	58.9	59.6	58.7	58.2
Life expectancy female (years)	65.3	65.1	64.1	64.7	64.1	63.8
Adult literacy (%)	82.1	82.5	82.7	82.8	83.1	83.3

**Data source:** Euromonitor International, 2022, <sup>E, F</sup>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

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service and are ready to pay extra if convinced of a product's overall superiority. Kenya is a value market, but still price sensitive. As a result, businesses must ensure timely delivery dates, and honor quality after-sales service. A U.S. exporter should allow for additional shipping time to Kenya and continuously update the buyer on changes in shipping schedules and routing. It is better to quote a later delivery date that is guaranteed than an earlier one that is uncertain. Since Kenya importers generally do a lower volume of business, U.S. exporters should be ready to offer smaller shipments.

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

### **General Consumer Tastes, Preferences, and Trends**

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

Kenya 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 similar products. Many U.S. brands like Kraft Foods, Heinz, General Mills, Post, and Betty Crocker are available in the Kenya 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 retail sector 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: [2023 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). 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. Goods arriving at the port without a CoC are subject to inspection at a fee equivalent to 5 percent of the approved custom value.

### **Country Language Labeling Requirements**

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

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

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More information is available at: [2023 FAIRS Country Report](#)

### **Tariffs and FTAs**

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

Effective July 1, 2022, the EAC raised the CET for several agricultural products to 35 percent, including edible oils, beverages, and spirits. For several products designated as “sensitive,” the EAC applies tariffs above 35 percent including milk and dairy products (60 percent), corn (50 percent), rice (75 percent), wheat flour (60 percent), and sugar (100 percent). The full EAC tariff book is available at: <https://www.eac.int/documents/category/eac-common-external-tariff>.

In addition to tariffs, there are additional charges associated with exporting to Kenya. These include a 3.5 percent Import Declaration Fee (IDF) for all imported goods (reduced to 1.5 percent for raw materials and intermediate goods), a 1.5 percent Railway Development Levy (RDL), and a Value Added Tax (VAT) of 16 percent charged on Cost, Insurance, and Freight (CIF) value.

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

In December 2020, Kenya signed a free trade agreement with the United Kingdom which went into effect in January 2021. Additionally, Kenya participates in two regional economic blocks that lower tariffs between members. Kenya is a member of the EAC which includes Uganda, Tanzania, South Sudan, Rwanda, Burundi, the Democratic Republic of the Congo, and Somalia. 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, the Seychelles, Sudan, Swaziland, Uganda, Zambia, and Zimbabwe.

### **Documents Generally Required by the Kenyan Government for Imported Food**

#### **Pre-Shipment Documents**

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

#### **Post-Shipment Documents**

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

Other Documents That May Be Required:

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

Find more in the [2023 FAIRS Export Certificate Report](#).

**Trademark and Patent Protection**

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

**Section IV: Market Sector Structure and Trends**

**Food Retail Sector**

Kenya's formal retail food sector continued to expand in 2022 reaching an estimated value of \$9.6 billion due to increased urbanization and growth in the e-commerce sector. Informal retail (consisting of small kiosks) still dominates the sector posing strong competition to modern grocery retailers. In 2022, the value of grocery retail sales grew 11 percent to \$8.5 billion. Naivas Ltd is Kenya's leading grocery chain with a retail value share of 10 percent, and more than 100 outlets.

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 flyers to advertise products.

**Food Processing Sector**

Kenya's food manufacturing sector grew 1.1 percent in 2022 compared to a growth rate of 3 percent in 2021. This lower growth was mostly due to lower availability of raw materials associated with drought conditions. Production in Kenya's vegetable oil and dairy sectors declined 9.4 and 8.4 percent

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respectively. Sectors that experienced growth in 2022 include fish processing (15.6 percent), sugar (13.8 percent), meat and meat products (6.4 percent), bakery products (6.3 percent) and fruit and vegetable preparation (5.3 percent).

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

### **Hotels, Restaurants, and Institutions (HRI)**

Kenya boasts a thriving food service sector, which encompasses a diverse range of establishments, including upscale restaurants, local and international quick-service restaurants, specialty shops, online retail stores, cafes, and traditional markets such as kiosks. Most establishments utilize imported processed vegetables, including potatoes and canned foods.

American fast food chain outlets, such as Kentucky Fried Chicken (KFC), Subway Ltd., Domino's Pizza, and Cold Stone Creamery, are present in Kenya. American pizzeria, Papa John's International, opened a restaurant in Nairobi, and has plans to open 13 more restaurants by December 2024.

International hotel brands, such as the Best Western Group, Villa Rosa Kempinski, Crowne Plaza, the Marriot Group, Dusit2 International, and Accor, are present in Kenya. Nairobi's growing role as a business and conferencing center has driven an expansion in the hotel sector. According to W. Hospitality's 2023 Pipeline Report, 25 hotels are expected to add 3,729 hotel rooms by the end of 2023.

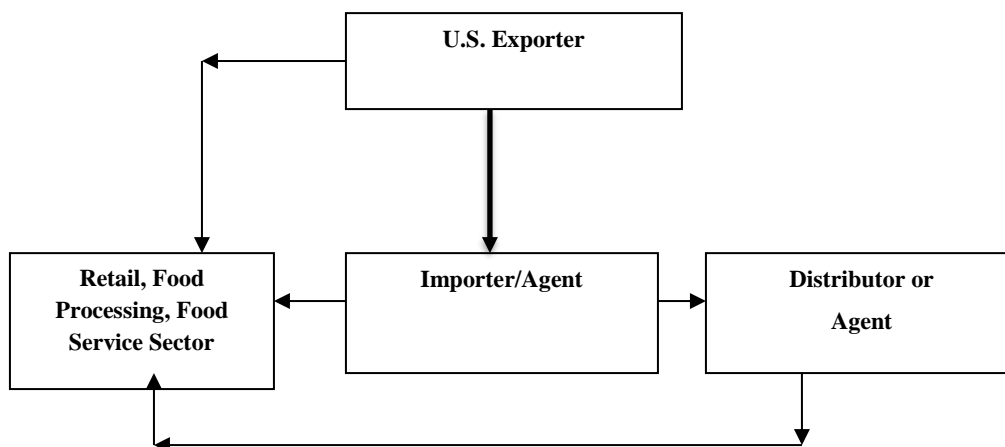
### **Distribution Channels**

Most Kenya 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 2022 Growth Trends**

Product Category	<sup>1</sup> Market Size (Volume, 2022)	<sup>1</sup> Import Value (2022)	<sup>1</sup> 5-Year Annual Import Growth Rate (%) 2018-2022	<sup>2</sup> Import Tariff Rate (%) 2022	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)	14,566 metric tons	\$28.3 million	15.4%	35%	High landed costs and competition from Argentina, India, Egypt, United Kingdom (UK), Norway, and Uganda.	Good growth potential. U.S. brands perceived as high quality, premium brands.
Sauces, condiments, jams, and jellies	Data split between tons and liters	\$11.7 million	6.42%	35%	Competition from low-cost suppliers such as Egypt, Indonesia, South Africa, China, and the UK.	Good growth potential.
Pet food (for dogs and cats)	2,568 metric tons	\$3.7 million	6.7%	35%	High landed costs and competition from Turkey, Germany, Belgium, South Africa, and Spain.	Good growth potential.

Distilled spirits and other alcoholic beverages (excluding wine and beer)	14.32 million liters	\$47.1 million	3%	35%	Competition from the UK, France, Tanzania, Ireland, and South Africa.	Good growth potential.
Tree nuts	1,617 metric tons	\$4.7 million	32%	35% for shelled 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: <sup>1</sup>Trade Data Monitor (TDM); <sup>2</sup>East Africa Community[EAC] Common External Tariff [CET]Book; <sup>\*\*</sup>Reflects import volumes only.

\*Europe means *The Netherlands, Denmark, France, Belgium, and Italy.*

### **Best Ingredient Prospects Based on Growth Trends in 2022**

<b>Product Category</b>	<b><sup>1</sup>Market Size – 2022 (Volume) Metric Tons</b>	<b><sup>1</sup>Imports (2022) (\$1,000)</b>	<b><sup>1</sup>5-Year Average Annual Import Growth Rate (%) (2018-2022)</b>	<b><sup>2</sup>Import Tariff Rate (%) (2022)</b>	<b>Key Constraints Over Market Development</b>	<b>Market Attractiveness for USA</b>
Wheat	1.68 million	\$653,736	13.21%	35%	Competition from low-cost suppliers of hard wheat such as Argentina, Australia, Russia, Lithuania, Poland, and Canada.	U.S. hard wheat is considered high quality and used for blending with cheaper wheat. U.S. soft wheat also has good market potential.
Dextrines, Peptones, and Proteins	3,870	\$7,190	9.2%	10%	Competition from low-cost suppliers such as China, Thailand, India, Austria, and South Africa.	U.S. ingredients are considered high quality. The U.S. is the second largest supplier of dextrines, peptones, and proteins
Fats and oils	826,858	\$1,153,214	19.6%	35%	Competition from low-cost suppliers such as Malaysia, Indonesia, Cote d'Ivoire,	Good growth potential.

					Singapore, and Thailand.	
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**Data Source:** Trade Data Monitor

More specific retail information can be found at:

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

## **Section V: Agricultural and Food Imports**

<b>Agricultural Products Imports</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023<sup>E</sup></b>	<b>2024<sup>F</sup></b>
Total agricultural product imports (in millions \$US)	\$2,613	\$2,607	\$2,701	\$3,261	\$3,633	\$3,771	\$4,040
Total agricultural products imports from the United States (in millions \$US)	\$53	\$78	\$32	\$63	\$98	\$87	\$95
Total agricultural and related products imports from the United States (in millions \$US)	\$54	\$78	\$32	\$63	\$70	\$88	\$95
Total imports of consumer-oriented foods and seafood products from the world (in millions \$US)	\$503	\$526	\$484	\$508	\$545	\$534	\$541
Total imports of consumer-oriented foods and seafood products from the United States (in millions \$US)	\$9	\$8	\$9	\$10	\$9	\$9	\$10

**Data Source:** TDM.

Information on U.S agricultural exports to Kenya for all categories including bulk, intermediate, and consumer-oriented products may be found at: [BICO Report](#).

## **Section VI: Key Contacts and Further Information**

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

United Nations Avenue, Gigiri

Email: [Agnairobi@usda.gov](mailto:Agnairobi@usda.gov)

[www.fas.usda.gov](http://www.fas.usda.gov)

### **Kenya Bureau of Standards (KEBS)**

Email: [info@kebs.org](mailto:info@kebs.org)

[www.kebs.org](http://www.kebs.org)

### **Kenya Plant Health Inspectorate Service (KEPHIS)**

Email: [director@kephis.org](mailto:director@kephis.org)

[www.kephis.org](http://www.kephis.org)

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**Department of Veterinary Services (DVS)**

Email: [veterinarydepartment@yahoo.com](mailto:veterinarydepartment@yahoo.com)

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

**National Biosafety Authority (NBA)**

Email: [info@biosafetykenya.go.ke](mailto:info@biosafetykenya.go.ke)

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

**Ministry of Health**

Public Health Department

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**Attachments:**

No Attachments