# CONTEXT

## KENYA'S FOOD AND BEVERAGE INDUSTRY

The food and beverage (F&B) sector in Kenya is a significant component of the country's manufacturing and agribusiness landscape, contributing to national food security, employment, and economic growth. In 2025, Kenya's food market—including fresh and processed food sectors—generated an estimated USD 54.62 billion in revenue, and is expected to grow by 9.8% by 2030.[1] The sales of ultra-processed packaged foods grew by 16% over a period of 5 years from 2017 to 2023.[1]

The sector comprises a wide range of actors, from small-scale enterprises to large global-headquartered corporations engaged in food processing, packaging, distribution, and retail. Large global-headquartered corporations dominate segments such as dairy, beverages, and milling, while micro-, small-, and medium-sized national enterprises (MSMEs) make up the majority of actors involved in value-added processing and retail. Informal markets also play a central role in food distribution, often operating outside formal regulatory oversight.[2]

Rapid urbanization, a growing middle class, and shifting dietary preferences are driving demand for processed packaged food in Kenya. However, significant disparities remain in access to nutritious, affordable, and safe food— particularly in rural and low-income urban communities. These demographic and consumption trends shape market behaviour and influence the operational strategies of the F&B industry operating in Kenya.

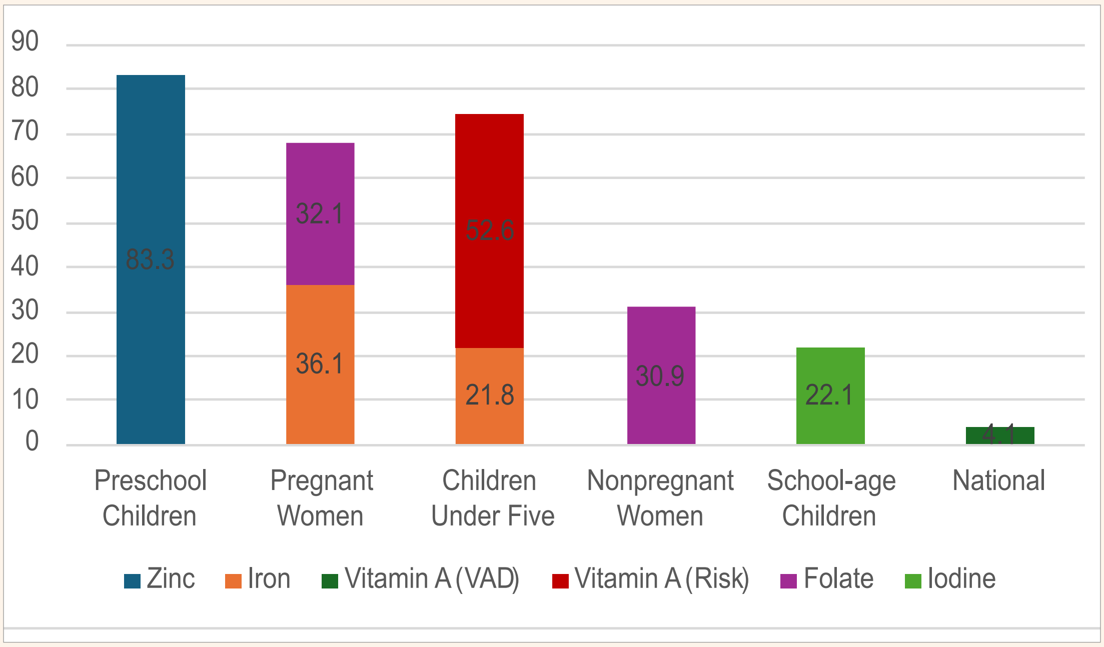
## THE TRIPLE BURDEN OF MALNUTRITION

Like many other countries, Kenya faces the triple burden of malnutrition, characterized by the coexistence of undernutrition (stunting, wasting, and underweight), micronutrient deficiencies, and overweight, obesity and diet-related non-communicable diseases (NCDs).

- **Undernutrition:** The prevalence of undernutrition among children has decreased in Kenya. In 2000, 38.5% of children under five were stunted, 7.4% were affected by wasting, and 7.4% were overweight. By 2022, Kenya had succeeded in reversing some of these trends: 18.4% of children under five were stunted, 4.5% were affected by wasting, and 3.8% were overweight.[3]

- **Micronutrient deficiency:** The Kenya National Micronutrient Survey (2011) indicates that women and young children are most at risk of experiencing various forms of micronutrient deficiencies, including iron, vitamins A and B12, folate, iodine, and zinc (see Figure 1). Kenya has made progress in reducing the prevalence of anaemia among women of reproductive age (15-49 years), from 39.89% in 2000 to 28.7% in 2019.[4]

FIGURE 1
## PREVALENCE OF MICRONUTRIENT DEFICIENCY IN KENYA, 2011




- **Overweight, obesity, and diet-related disease**: The prevalence of obesity among adults (18 years and older) rose from 4.2% in 2000 to 12.4% in 2022. NCDs pose a critical public health challenge in Kenya, accounting for 39% of all deaths, contributing to more than half of hospital admissions, and absorbing 11% of national healthcare expenditure.[5]

Trends in the increasing prevalence of overweight, obesity, and diet-related disease in Kenya are partly driven by a nutrition transition—from fresh and minimally processed staple foods to processed and packaged products. As in many low- and middle-income countries, Kenya is experiencing rapid growth in retail food outlets selling commercial pre-packaged foods and beverages. Studies show that formal retail outlets in Kenya primarily stock processed packaged foods.[6, 7] Additionally, the sales and unregulated marketing of products typically considered 'unhealthy'—including highly processed packaged foods—are influencing dietary behaviours.[8] This shift in the food environment is altering dietary patterns across all age groups in Kenya.

## REGULATORY AND POLICY ENVIRONMENT

The F&B industry in Kenya operates under a regulatory framework under the responsibility of several government institutions. Key regulatory bodies include the Kenya Bureau of Standards (KEBS), the Ministry of Health, the Ministry of Agriculture and Livestock Development, and the Kenya Food and Drugs Authority. These institutions are responsible for food safety, labelling, marketing, nutritional standards, and product quality across the country.

To tackle the rising rates of obesity and diet-related disease—partly driven by changing dietary patterns—the 'Kenya National Guidelines for Healthy Diets and Physical Activity' advocate for dietary diversity and a reduced intake of nutrients of concern, such as salt, sugar, and fats.[9] The government is currently reviewing the Kenya Nutrition Action Plan (KNAP)[10] and has publicly committed to introducing policies to improve the national food environment.[11]

There is an urgent need to increase investments in strengthening and integrating nutrition into primary health care and community interventions in Kenya to combat malnutrition.[12] Furthermore, the F&B industry's contribution to nutrition must be properly regulated to enhance its potential in improving nutritional outcomes and preventing malnutrition.

As the Government of Kenya enacts food policies such—as front-of-pack nutrition labelling and marketing restrictions on unhealthy food products—there is a need to integrate accountability frameworks to guide the F&B industry in adhering to these measures to improve food and nutrition security in Kenya.

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