(1/2)

"FARMER" IMPLIES: (1) MIXED FARMERS – *who produce* CROPS, LIVESTOCK, FISH; (2) PASTORALISTS; (3) AND FISHERFOLK, UNLESS STATED OTHERWISE

Small-scale farmer incomes

~8.6 million

farmers in Kenya representing ~4.5 million farming households, even if only ~350,000 formal jobs exist in the sector

~60%

of production including **60-70% of all maize production from small-scale farmers**. But only **10-15% of incomes** for these farmers come from maize

Agricultural output and value addition

~33%

of total GDP, ~**80% from crops, ~15**% from livestock, <2% fish and aquaculture, and the rest from others[3]

~2.3%

of national budget spent on agriculture[4] (~KES 60bn), of which ~**KES 5bn spent on subsidies,** equivalent to ~13% of MoALF&I budget

Household food resilience

21

out of 100 score on Global Hunger Index *(1 is best)*, ranked **better than regional peers**, particularly on **availability of food**

3-4x

more potential for fisheries production in Lake Victoria than previous estimates, a significant opportunity for GDP and **protein nutrition in Kenyan diets**

1 Of irrigated land, 42% by small scale schemes ~15ha/scheme, 40% commercial over 45,000ha, 18% government schemes with avg. 2600ha/scheme, but only 2 countries (Tana, Kirinyaga) have capacity >8000ha | 2 Statistics fluctuate year on year e.g., 2016 was 11th largest in world and yields of 162 according to FAOSTAT | 3 Forestry and support activities | 4 CAADP target is 10% | 5 Measured in % terms for beans and maize (i.e. beans ~400%) to meet best-in-class peers including Ethiopia, S. Sudan, Uganda, Rwanda, Burundi and Tanzania, but kg/head for meat to match South Africa | 6 Measured by standard deviation in consumer price food indices, Kenya is at 7, EAC is at 4

SOURCE: Observations of Economic complexities; EIU; GEC; Kaves-USAID; APHILIS; FAOSTAT; Expert interviews; I_DEV; CBK; KIHBS; Kenya economic survey 2017; KNBS; World Bank; Kenya Bureau of Statistics; CommTRADE 2013; Kenya Demographic and Health Survey, FAO; Kenyan Demographic and Health survey 2014; UMCES Data Africa; IFPRI; APHTACIS; Kenya market trust; FAOSTAT; Tegemeo; National Water Master Plan; State Department of Fisheries

Selected facts on Kenya's agriculture sector

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Small-scale farmer incomes

<7%

of small-scale farming land is irrigated, **most arable land is rain fed**[1]

2nd

largest livestock herd in Africa, **13th largest number of dairy cows in world, but 138th yields** due in part to cold chain storage[2]

Agricultural output and value addition

KES**100bn**

Opportunity for Kenya to capture from **closing yield gaps in maize, beans and tea** to best in class regional peers[5]

~16%

value addition from agro-processing, below regional peers

Household food resilience

1.3 million

chronically food insecure Kenyans in ASALs, primary due to drought. **Increases to 4mn Kenyan's during severe droughts** (average of 2.7mn year around)

2x

more price volatility than rest of EAC peers[6] including Uganda, Tanzania, Rwanda, Burundi for key staples

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