

"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



## Agricultural output and value addition



**~33%**

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



## 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**



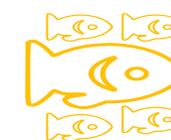
**~60%**

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



**~2.3%**

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



**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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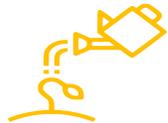
Small-scale  
farmer incomes



Agricultural output  
and value addition



Household food  
resilience



<7%

of small-scale farming land is irrigated, **most arable land is rain fed**<sup>1</sup>



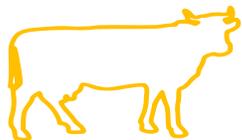
KES **100bn**

Opportunity for Kenya to capture from **closing yield gaps in maize, beans and tea** to best in class regional peers<sup>5</sup>



**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)



**2<sup>nd</sup>**

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



**~16%**

**value addition from agro-processing**, below regional peers



**2x**

more price volatility than rest of EAC peers<sup>6</sup> including Uganda, Tanzania, Rwanda, Burundi for key staples

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