



Investing in the Meat Sector in Kenya



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Industrial Confidence at Scale.

At a defining moment in Kenya's industrial journey, ARISE IIP Kenya is delivering a new standard for industrial development — built on coordination, partnership, reliability, and long-term performance.

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By aligning a secured multi-zone industrial portfolio under common standards, sector logic, and investor pathways, ARISE IIP Kenya delivers a single, coordinated industrial platform enabling investors to enter with clarity, operate with certainty, and scale across locations without restarting the investment journey.

The ARISE IIP Kenya industrial platform is not a collection of zones.

It is Kenya's industrial advantage system — designed for delivery.

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From National Ambition to Industrial Performance.

Acknowledgements



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TRADE AND INDUSTRY



**Ministry of Agriculture and
Livestock Development**

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- State Department for Agriculture (SDA)
- Directorate of Veterinary Services
- Kenya Meat Commission (KMC)
- National Environment Management Authority (NEMA)

Their insights and contributions were instrumental in shaping the content of this publication.

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Global Meat Market Overview

\$1.5T

Global Market Value

Total meat market value in 2024

\$1.9T

Projected Growth

Expected market value by 2034

2.3%

Annual Growth Rate

Compound annual growth rate
(CAGR)

3.2%

Volume Growth

Expected increase in 2026

The global meat market demonstrates robust growth potential, with revenue potentially reaching USD 1.55 trillion in 2025. This expansion reflects increasing global protein demand and evolving consumption patterns across developed and emerging markets.

Global Meat Consumption Patterns

Developed Countries

~100 kg/year

USA leads consumption with highest per capita rates, driven by established dietary preferences and purchasing power.

Global Average

43 kg/year

Worldwide consumption reflects diverse dietary patterns and economic development levels.

African Countries

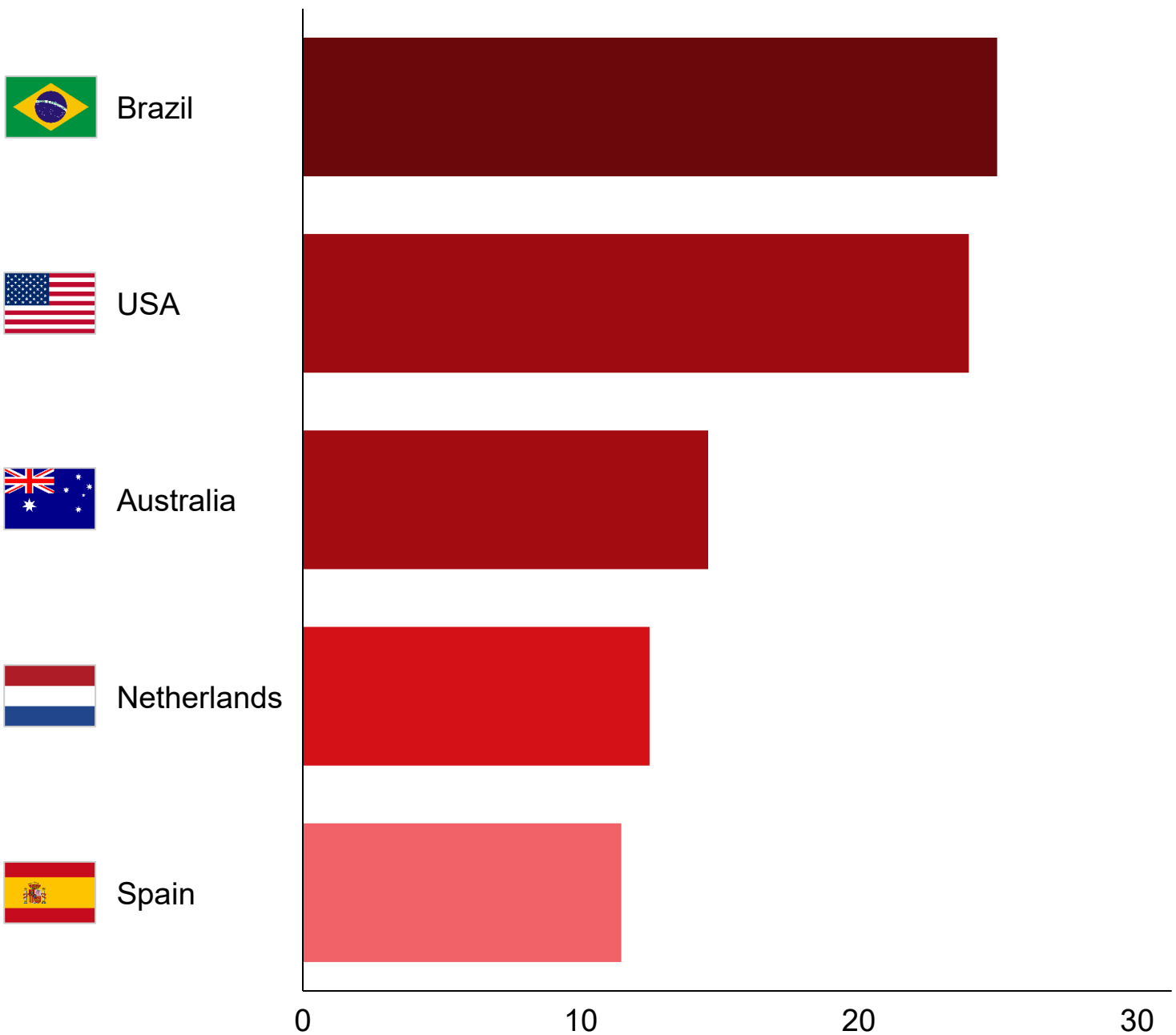
~19 kg/year

Less than half the global average, indicating significant growth potential for the continent.

Source: OECD-FAO
Agriculture Outlook 2025-2034,

Global Meat Export Leaders

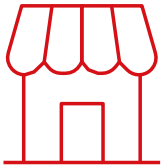
Global meat exports, USD Bn



Note: Global meat exports totaled USD 169.4 billion in 2024. Brazil dominates with 14.4% market share, followed by the USA at 13.3%. These top five exporters collectively control nearly half of global meat trade

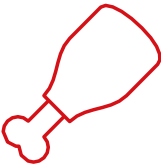
Source: Meat product profile, Kepraba August, 2025

Kenya's Beef Sector at a Glance



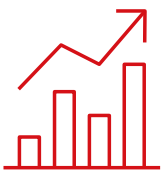
17 Million Beef Cattle

Beef cattle population supporting 10 million livelihoods directly, with 56.5% controlled by pastoralists in arid and semi-arid lands.



260,000 Tonnes

Annual beef production in 2024, valued at KSh 159.7 billion, representing the highest volume among all meat products.



4% Growth Rate

Annual production growth contributing 12% to national GDP and 42% to agricultural GDP.

Source: KNBS Economic Survey ,2025 KNBS; National Agriculture Production Report ,2025

Kenya's Position in Global Trade

Export Ranking

53rd globally
 USD 145.4 million
 in exports (2024)

Import Ranking

162nd globally
 USD 14.4 million
 in imports (2024)

Trade Balance

Net Exporter
 Positive balance
 of USD 131 million

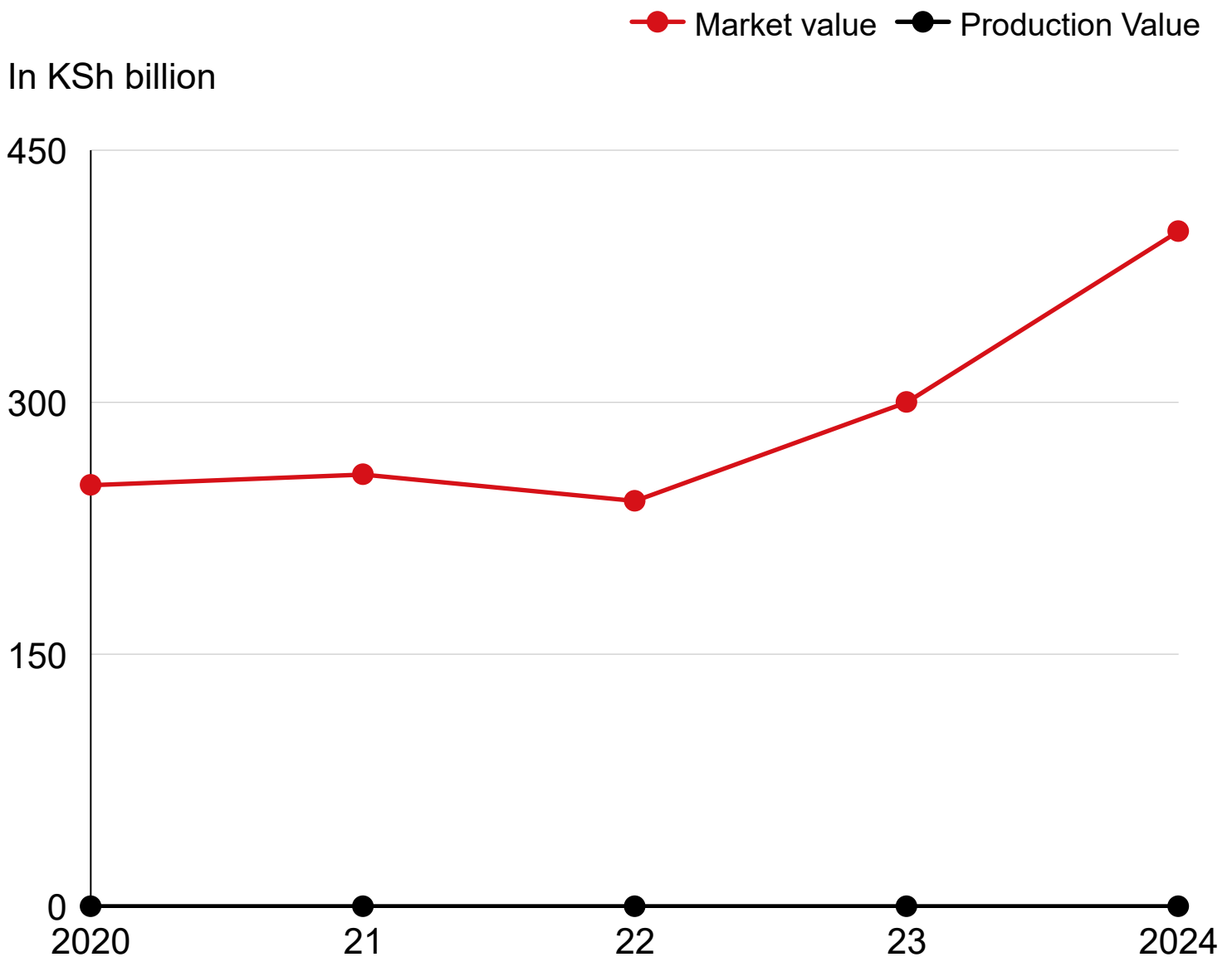


Kenya maintains a strong positive trade balance in meat products, demonstrating competitive advantages in production and quality. The country's export performance has grown at an impressive 22.8% annually from 2020 to 2024.

Source: Meat product profile ,Keproba August ,2025 KNBS; National Agriculture Production Report ,2025

Kenya's Meat Production Growth

Kenya's meat production sector has experienced remarkable growth, with total production reaching 613,600 tonnes in 2024, valued at KSh 397.5 billion. This represents a 10.2% increase in quantity and 30.5% increase in value from 2023



Source: KNBS; National Agriculture Production Report 2025

Meat Production by Type (2024)



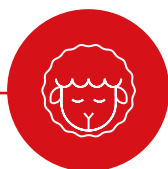
Beef

260,083 tonnes
Largest contributor



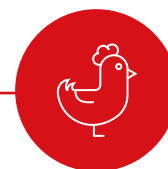
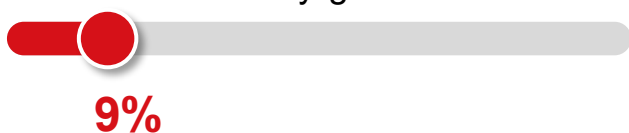
Chevon

97,436 tonnes –
25.7% increase



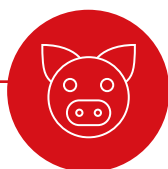
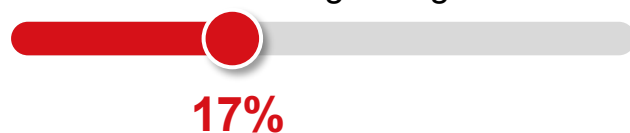
Mutton

56,527 tonnes
Steady growth



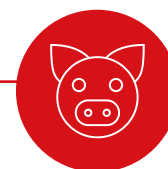
Poultry

102,529 tonnes
Fastest growing



Camel

61,917 tonnes
ASAL regions



Pork

34,493 tonnes
Urban markets



Source: KNBS; National Agriculture Production Report ,2025

Top Beef Producing Counties



Leading Producers

1. Kajiado - Pastoral systems
2. Narok - Ranching operations
3. Baringo - Agro-pastoral
4. Turkana - Extensive grazing
5. Laikipia - Commercial ranches



Production Systems

These counties leverage diverse production systems including pastoralism, ranching, and agro-pastoralism, with favorable weather conditions in 2024 improving pasture availability.



Source: KNBS; National Agriculture Production Report ,2025

Chevon Production Leaders

Turkana

Largest chevon producer, leveraging extensive goat populations in ASAL regions with traditional pastoral systems.

Kitui

Significant producer combining agro-pastoral systems with growing commercial goat farming operations.

Wajir

Major contributor from northeastern Kenya, where goats are well-adapted to arid conditions.

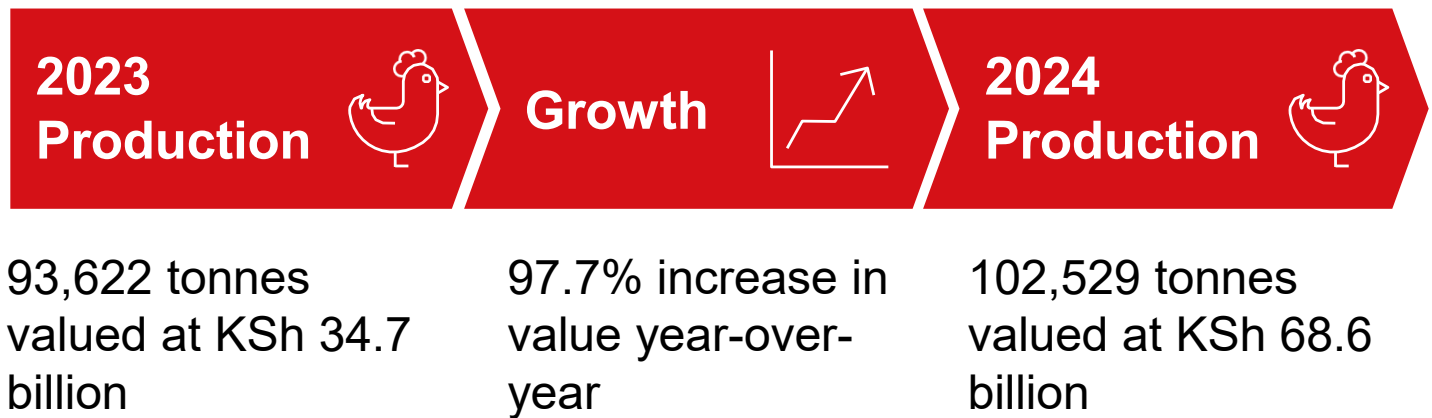
West Pokot

Growing production driven by favorable terrain and increasing market demand for goat meat.

Chevon production experienced remarkable 25.7% growth in 2024, reaching 97,436 tonnes valued at KSh 70.3 billion, driven by increasing domestic and export demand.

Source: KNBS; National Agriculture Production Report ,2025

Poultry Production Surge

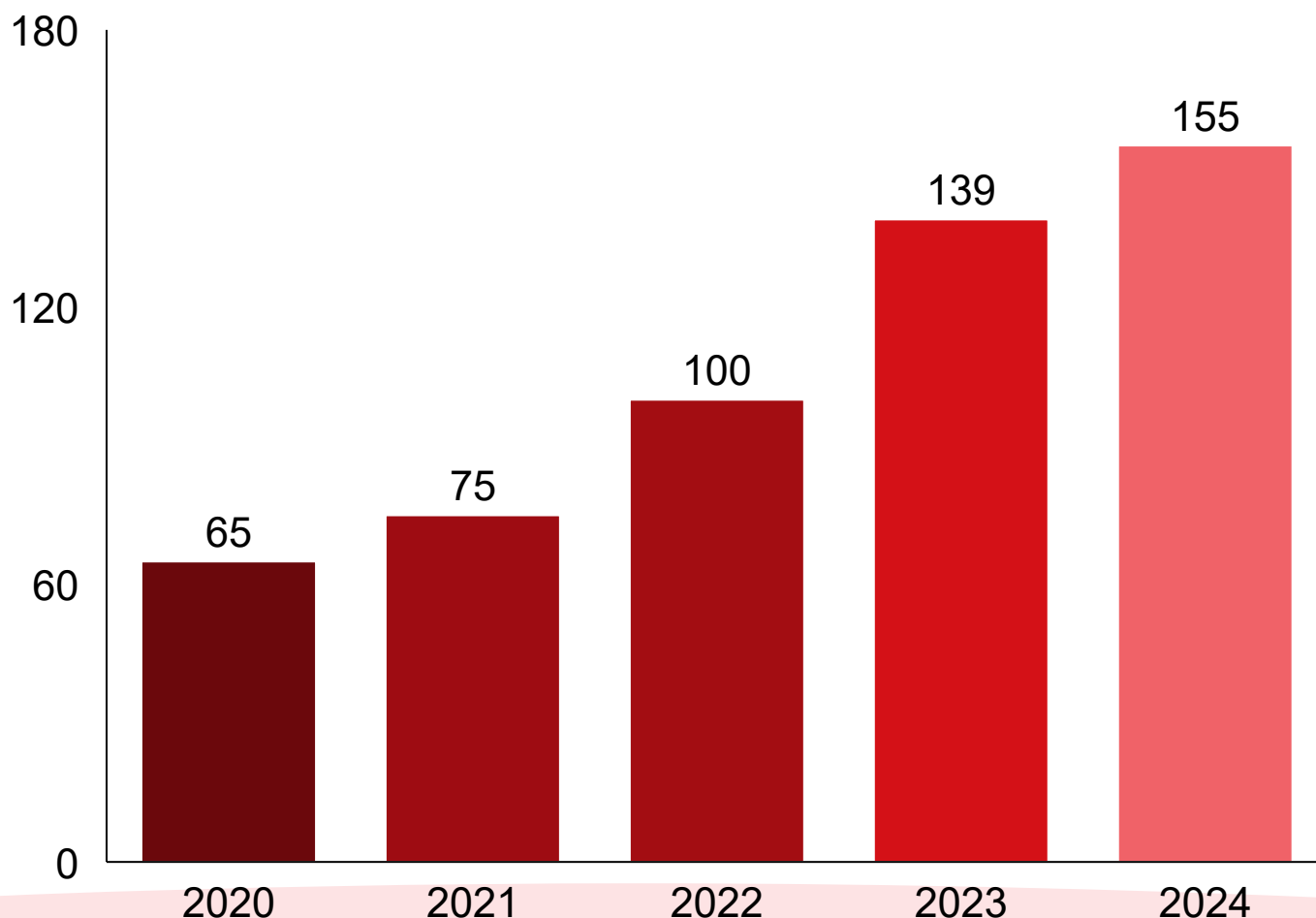


The poultry sector demonstrated exceptional growth, nearly doubling in value. This expansion reflects increasing urban demand, improved production systems, and growing commercial operations.

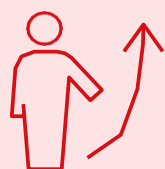
Source: KNBS; National Agriculture Production Report ,2025

Kenya's Export Success Story

Meat product exports, USD Mn



Impressive Growth








Exports increased steadily from USD 65 million in 2020 to USD 145 million in 2024, reflecting a **22.8% average annual growth rate**.

This trajectory demonstrates improved production capacity, market access, and competitiveness of Kenyan meat products.

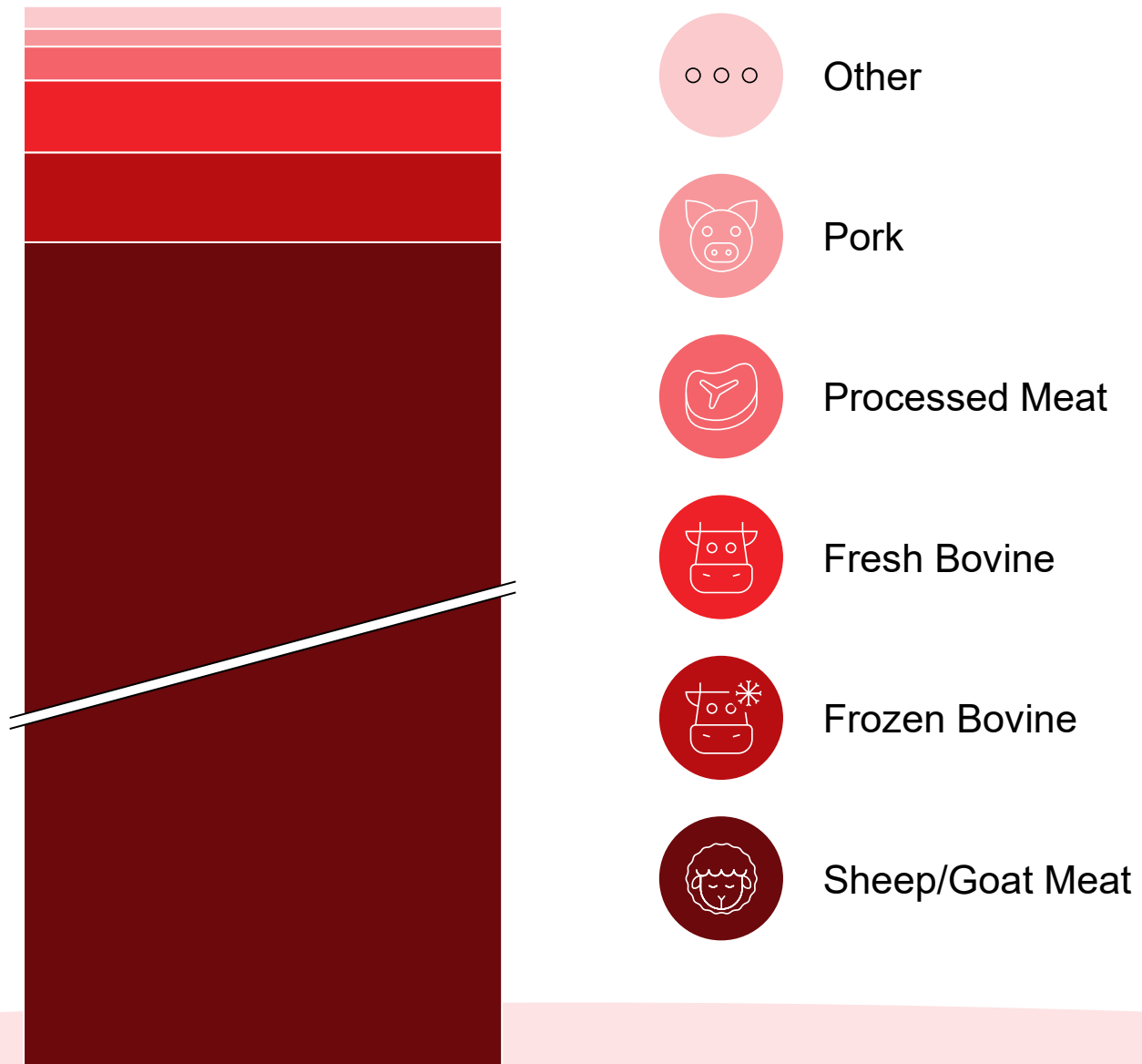
Source: KNBS; Meat product profile ,Kepraba August ,2025 KNBS; National Agriculture Production Report ,2025

Top Export Destinations

- | | | | |
|---|---|-----------------------------|---|
| 1 |  | United Arab Emirates | USD 83.3 million (57.3%)
Largest market for Kenyan meat, driven by strong demand for halal-certified products. |
| 2 |  | Saudi Arabia | USD 16.9 million (11.6%)
Growing market with increasing appetite for quality meat imports. |
| 3 |  | Bahrain | USD 16.8 million (11.5%)
Consistent importer of Kenyan meat products. |
| 4 |  | Kuwait | USD 10.0 million (6.9%)
Emerging market with strong growth potential. |
| 5 |  | Iran | USD 5.5 million (3.8%)
New market entry showing promising expansion. |

Source: KNBS; Meat product profile ,Kepraba August ,2025 KNBS; National Agriculture Production Report ,2025

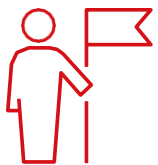
Export Product Composition



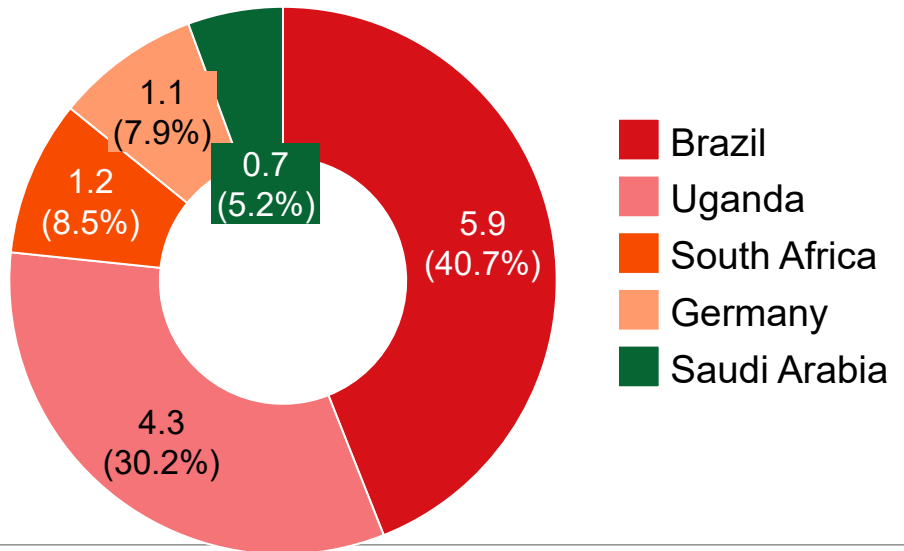
Sheep and goat meat dominates Kenya's exports at 89.7% (USD 130.4 million), reflecting strong Middle Eastern demand for these products. Bovine meat products account for 7.2% combined, while processed meats and other products represent smaller but growing segments.

Source: KEPROBA; Meat Product profile ,August 2025, KNBS National Agriculture Production Report ,2025

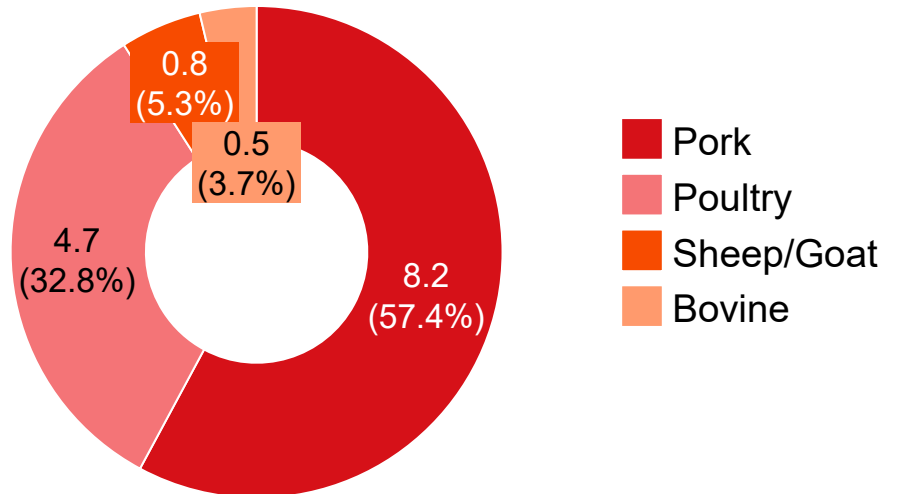
Import Sources and Products



Top Import Partners, USD M



Main Import Products, USD M



Kenya imports primarily pork and poultry to meet domestic demand for products not sufficiently produced locally. Brazil dominates as the largest supplier, reflecting its global competitiveness in meat exports.

Source: KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

Competitive Landscape Analysis

Brazil's Dominance

Brazil controls 30-50% of Kenya's key export markets (UAE, Saudi Arabia, Bahrain, Kuwait, Iran), representing the greatest competitive threat.

Secondary Competitors

Australia and India are recurring competitors across multiple markets, offering quality products and established supply chains.

Kenya's Opportunity

Target niche markets with halal-certified, organic, or specialty meats. Leverage proximity to Middle East and trade agreements.

Differentiation Strategy

Enhance quality, consistency, and branding to stand out from bulk suppliers. Focus on premium segments and value-added products.

Source: KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

Beef Production Systems

Pastoralism

80% of beef consumed domestically. Practiced in ASALs by communities controlling 56.5% of cattle. Extensive grazing on natural pastures.

Agro-Pastoralism

Mixed farming combining crop production with livestock. Provides diversified income and utilizes crop residues for feed.

Ranching

Commercial operations with improved breeds and management. Focus on quality beef for premium markets and exports.

Feedlots

Intensive finishing systems for rapid weight gain. Produces high-quality beef meeting export standards and premium domestic demand.



Types of Breeds

Indigenous Breeds

- **East African Zebu** - Highly adapted to harsh climates
- **Boran** - Excellent heat and drought tolerance
- **Sahiwal crosses** - Disease resistant

Favored for hardiness and low input requirements in ASAL regions.



Exotic Breeds

- **Hereford** - Superior meat quality
- **Charolais** - Rapid growth rates
- **Crossbreeds** - Combining hardiness with productivity

Used in commercial operations for improved meat quality and market premiums.



Source: KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

The Meat Value Chain



The value chain creates employment opportunities at every stage, from cattle farming and veterinary services to meat processing and retail, sustaining livelihoods for millions of Kenyans.

Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

Slaughterhouse Categories

Category A – Large Slaughterhouses

Licensed for export and domestic markets. Can supply nationwide. Includes Kenya Meat Commission, Neema, and Choice Meat.

Category B – Medium Slaughterhouses

Slaughter for domestic markets, allowed to sell to neighboring counties. Bulk of meat consumed in Nairobi and Mombasa.

Category C – Slaughter Slabs

Located in sub-counties, supplying meat within the sub-county only. Basic facilities serving local communities.

Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025



Slaughterhouse Operations



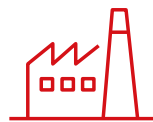
Live Animal Trading

Terminal markets at slaughterhouses where traders purchase cattle of specified quality for their target segments.



Inspection

Government veterinary officers inspect and stamp meat with oller marks certifying inspection compliance.



Slaughter Process

Stunning, halal slaughter, bleeding, flaying, evisceration, and carcass cleaning following Meat Control Act regulations.



Transport

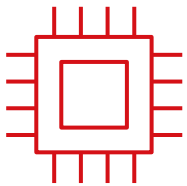
Carcasses loaded onto vans with Certificate of Transport (COT) issued at KES 20 per consignment for delivery to retail.

Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, KEPROBA; Meat Product profile ,August 2025,



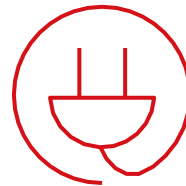
**Modernization
enhances food safety
and market access**

Modern Infrastructure & Systems for Meat Sector Transformation



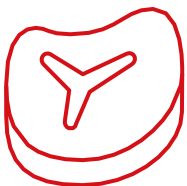
Traceability Systems

Electronic tagging and database systems to track carcasses from slaughter to retail, eliminating infiltration of unclassified meat.



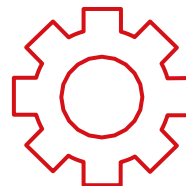
Electrical Hoisting

Replace manual hoists to ensure clean meat production with limited floor contamination and easier flaying.



Cold Chain Infrastructure

Chilling facilities and refrigerated transport to enhance quality, soften meat, and increase shelf life significantly.

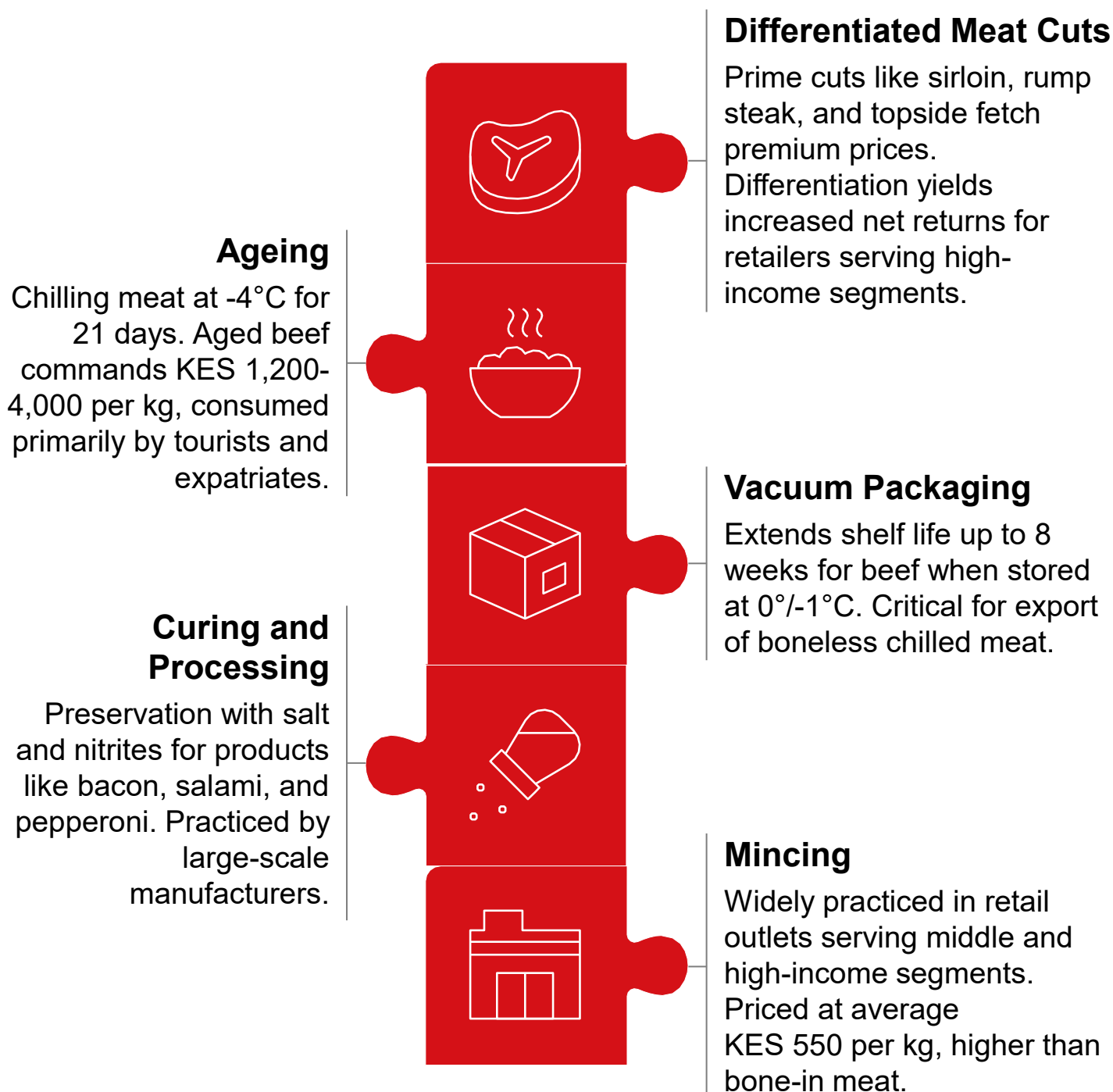


Processing Automation

Advanced equipment for stunning, flaying, and evisceration to minimize contamination and improve efficiency.

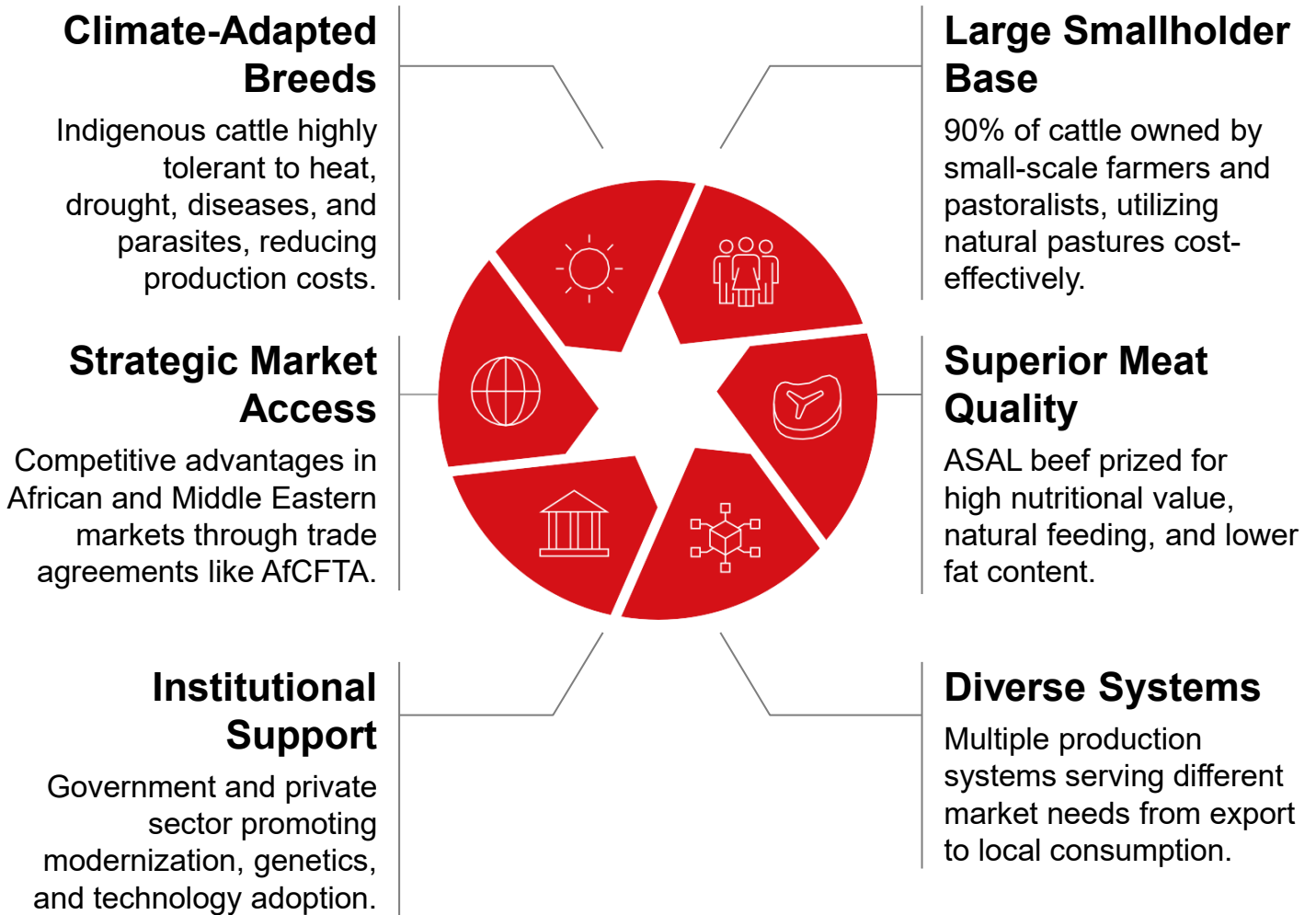
Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020

Meat Processing and Value Addition



Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020

Kenya's Comparative Advantages



Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

Economic Impact

KSh159.7B

Industry Value

Largest contributor to
livestock income

10M

Livelihoods

People employed or
economically engaged

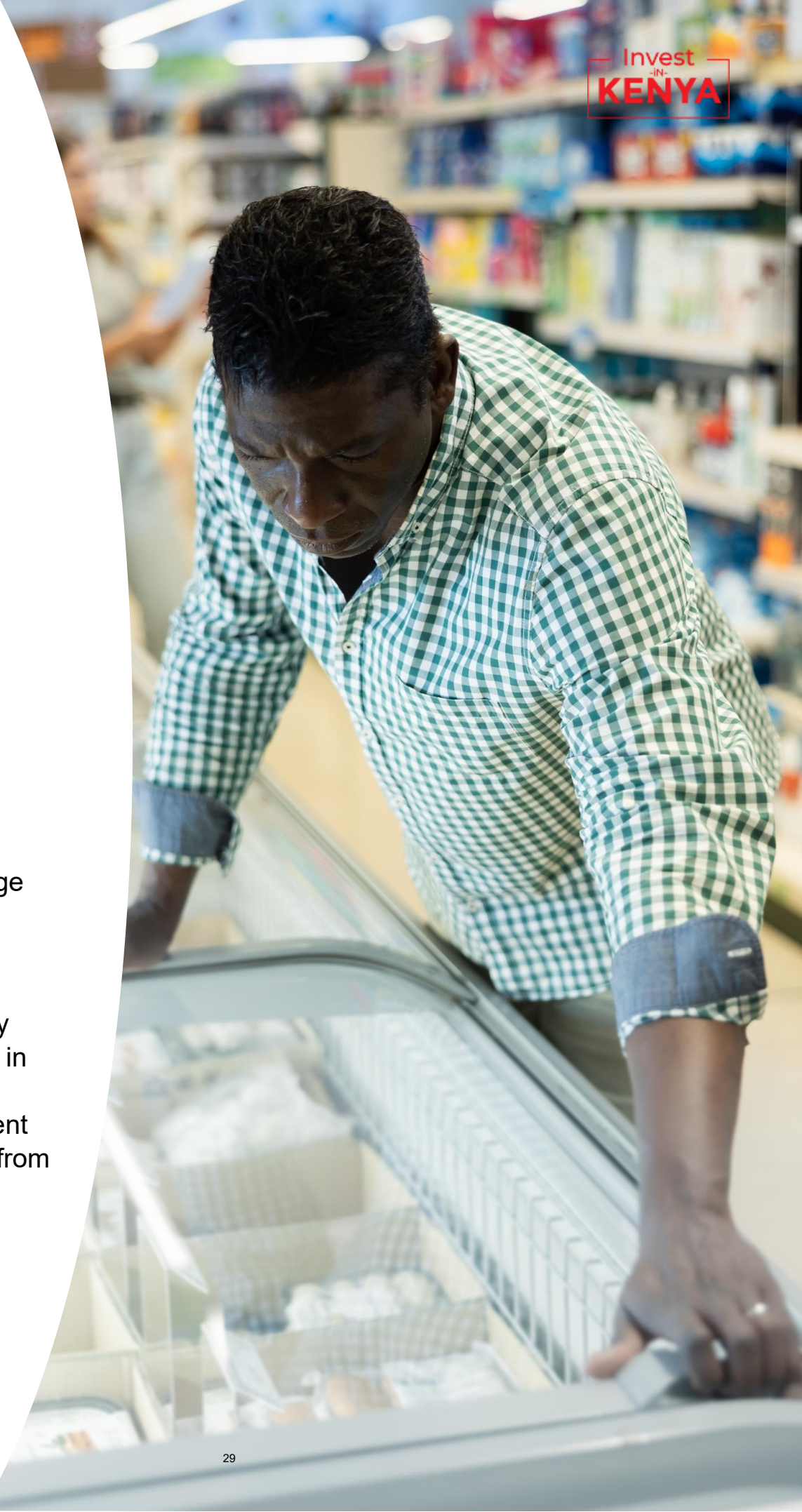
54,799

Direct Jobs

19% of agricultural wage
employment

The beef industry is critical for food security and economic stability in rural Kenya, with widespread employment along the value chain from farming to retail and support services.

Source: KNBS; National Agriculture
Production Report ,2025



Challenges Facing the Sector



Climate Variability

Recurrent droughts reducing grazing land and water availability, impacting livestock health and productivity.



Disease Outbreaks

Foot and Mouth Disease, East Coast Fever, and other diseases causing losses and limiting market access.



Infrastructure Gaps

Limited veterinary services, poor road networks, and inadequate storage facilities constraining market access.



Market Volatility

High production costs and price fluctuations affecting profitability and investment decisions.

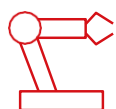


Land Tenure Issues

Insecurity, cattle rustling, and land conflicts hindering value chain development and investment.

Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, KEPROBA; Meat Product profile ,August 2025, KNBS; National Agriculture Production Report ,2025

Growth Opportunities



Processing Modernization

Invest in expanding meat processing facilities to meet growing demand for high-quality and processed products. Significant job creation potential.



Livestock Farming Investment

Ensure consistent and sustainable supply through improved breeding, feeding, and management practices.



Cold Chain Development

Build cold storage and refrigerated transportation infrastructure to improve supply chain efficiency and reduce wastage.



Export Market Expansion

Target new markets like Indonesia, leveraging Kenya's disease-free zones and halal certification capabilities.



Digital Platforms

Deploy technology for market information, farmer connections, and traceability systems enhancing transparency.

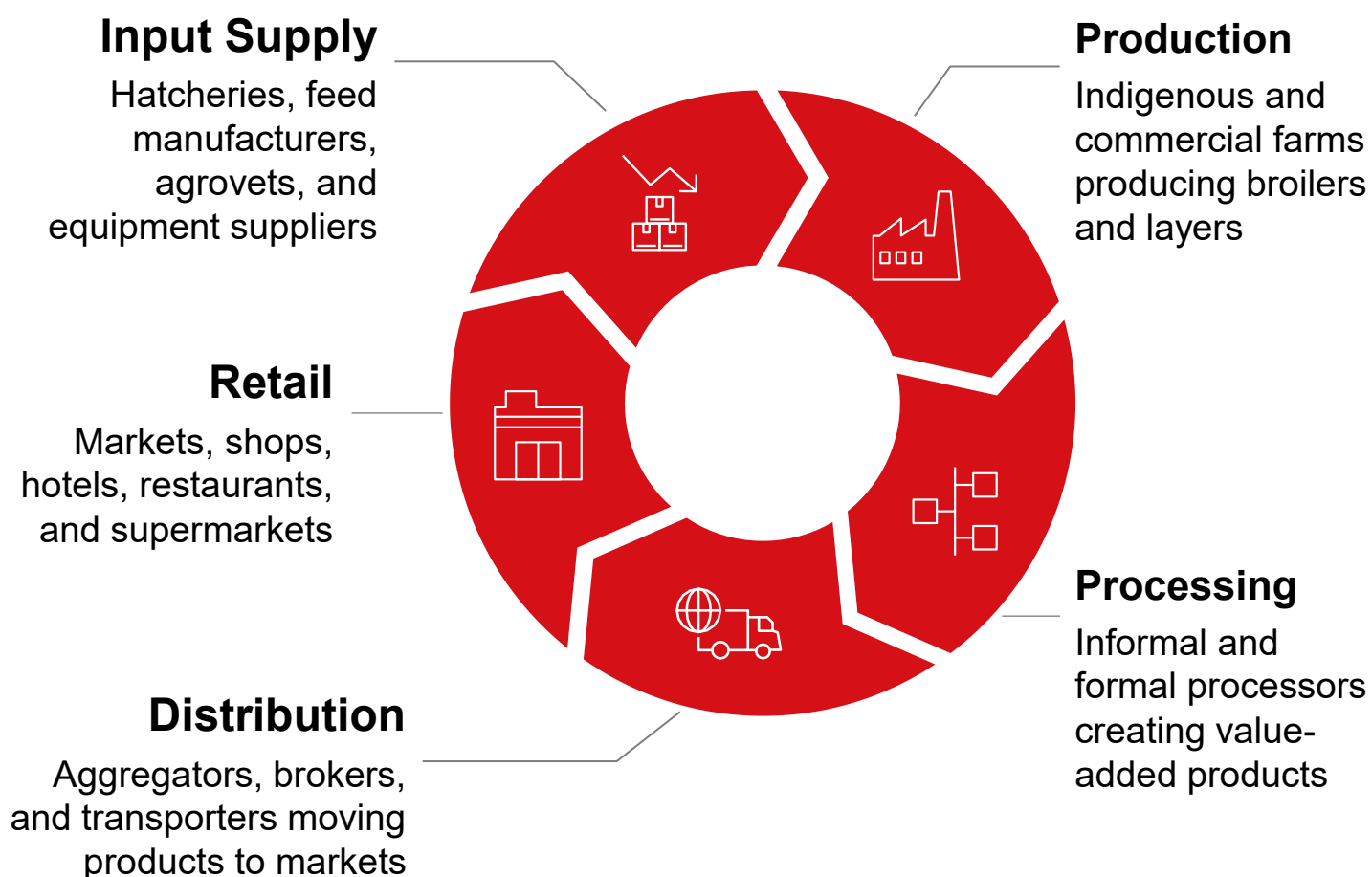


Premium Products

Develop organic and premium meat products catering to growing niche market segments willing to pay premiums.

Poultry Value Chain Overview

The poultry sector is a significant and rapidly growing component of Kenya's meat industry, involving diverse players from small-scale indigenous chicken farmers to large commercial producers. The sector addresses growing urban demand for meat and eggs while providing livelihoods for millions of rural households.



Source: OECD-FAO Agriculture Outlook 2025-2034, FAO ;Business Models Along the Poultry Value Chain ,Kenya-Evidence from Kiambu and Nairobi City Counties,2022

Poultry Production Systems

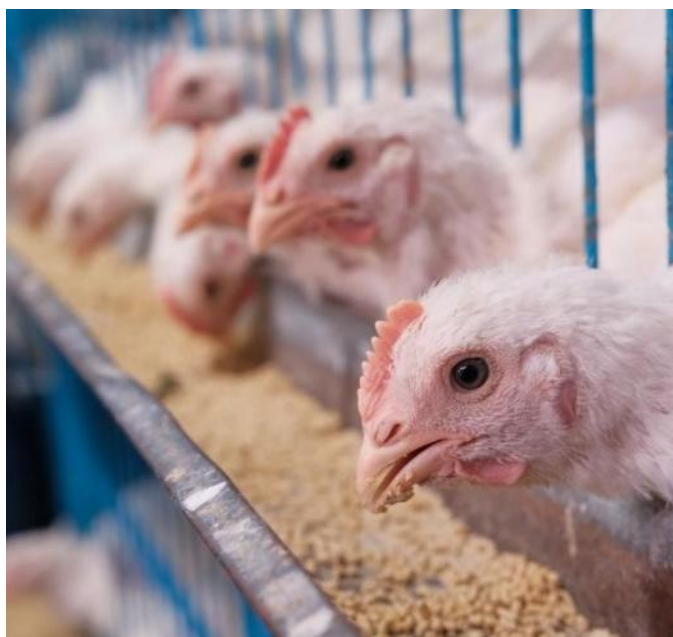
Indigenous (Kienyeji) Systems

- 80% of Kenya's poultry population
- Free-range systems in rural areas
- Primarily run by women and youth
- Low input, hardy breeds
- Growing market for organic products



Commercial Operations

- Concentrated in peri-urban areas
- Large-scale vertically integrated
- (Kenchic)
- Medium and small-scale
- contract farmers
- High productivity exotic breeds
- Meeting urban demand efficiently



Source: OECD-FAO Agriculture Outlook 2025-2034, FAO ;Business Models Along the Poultry Value Chain ,Kenya-Evidence from Kiambu and Nairobi City Counties,2022

Top Egg Producing Counties



Migori

Leading egg producer with favorable climate and established commercial farms



Kiambu

Proximity to Nairobi market driving intensive layer production



Uasin Gishu

Growing production supported by feed availability and infrastructure



Tana River

Emerging producer with expanding commercial operations



Meru

Strong smallholder base with increasing commercialization

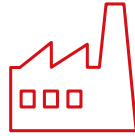
Source: KNBS; National Agriculture Production Report ,2025

Poultry Value Chain Players



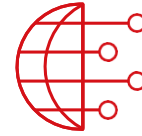
Hatcheries

Supply day-old chicks to farmers. Recent shortages creating investment opportunities in hatchery capacity expansion.



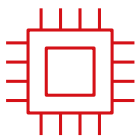
Feed Manufacturers

Companies like Unga Farm Care and Empire Feeds producing specialized poultry feeds for different growth stages.



Technology Providers

Nice Hatch Incubators providing advanced equipment; Inspira Farms offering cold-chain solutions for quality preservation.



Processors

Formal facilities producing frozen cuts, marinades, and processed products. Significant potential for value addition and job creation.



Retailers

Open-air markets, local shops, hotels, restaurants, and supermarkets serving diverse consumer segments with specific quality requirements.

Source: OECD-FAO Agriculture Outlook 2025-2034, FAO ;Business Models Along the Poultry Value Chain ,Kenya-Evidence from Kiambu and Nairobi City Counties,2022

Poultry Sector Opportunities

Hatchery Investment

Address day-old chick shortages by expanding hatchery capacity. Strong demand from growing commercial and smallholder sectors.

Value-Added Processing

Develop processed products like frozen cuts, marinades, and ready-to-cook items for urban consumers seeking convenience.

Cold Chain Infrastructure

Invest in refrigerated storage and transport to extend shelf life, reduce losses, and access premium markets.

Byproduct Utilization

Process chicken manure into organic fertilizer, creating additional revenue streams and supporting circular economy principles.

Source: OECD-FAO Agriculture Outlook 2025-2034, FAO ;Business Models Along the Poultry Value Chain ,Kenya-Evidence from Kiambu and Nairobi City Counties,2022

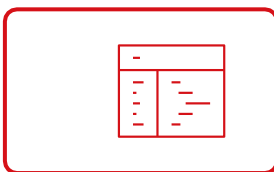


Investment Priorities



Infrastructure Development

Cold storage, processing facilities, and transportation networks



Technology Adoption

Traceability systems, automation, and digital platforms



Quality Enhancement

Food safety standards, certifications, and branding



Capacity Building

Training farmers, processors, and value chain actors



Market Expansion

Export development and premium domestic segments



Value Addition

Processed products, differentiated cuts, and specialty items

Strategic Recommendations



1 Modernize Slaughterhouses

Invest in Category A and B facilities with traceability, cold rooms, and automation to meet export standards and enhance food safety.



2 Develop Cold Chain

Build comprehensive refrigerated storage and transport infrastructure from slaughter to retail, reducing losses and improving quality.



3 Target Niche Markets

Focus on halal-certified, organic, and premium products to differentiate from bulk competitors like Brazil and Australia.



4 Expand Processing

Increase value addition through differentiated cuts, aged meat, cured products, and convenience items for growing urban demand.



5 Strengthen Traceability

Implement electronic tagging and database systems from farm to retail, ensuring quality assurance and market confidence.



6 Support Smallholders

Provide training, access to inputs, and market linkages for pastoralists and small-scale farmers who produce 80% of beef consumed.

Source: Kenya Market Trust ;Economics of Modernizing the meat industry in Kenya ,2020, OECD-FAO Agriculture Outlook 2025-2034

The Future of Kenya's Meat Sector



Kenya's meat sector stands at a pivotal moment. With 17 million cattle, growing production reaching 613,000 tonnes valued at KSh397.5 billion, and exports expanding at 22.8% annually, the foundation for transformation is strong.

The path forward requires strategic investments in modernization, cold chain infrastructure, and value addition.






By leveraging comparative advantages in climate-adapted breeds, diverse production systems, and strategic market access, Kenya can capture premium segments and expand exports significantly.

The opportunity is clear: transform from a bulk producer to a premium supplier, creating thousands of jobs, improving food security, and driving rural prosperity.

With coordinated efforts from government, private sector, and value chain actors, Kenya's meat sector can achieve its full potential as a cornerstone of agricultural growth and economic development.

Kenya offers multiple public SEZs, EPZs and industrial parks

Example parks¹

	Konza Technopolis Machakos 5,000 acres	Borders 3 counties (Makueni, Machakos and Kajiado) 60 KM from Nairobi
	Dongo Kundu SEZ Mombasa 3,000 acres	Adjacent to the Mombasa Port in Likoni
	Naivasha SEZ Naivasha 1,000 acres	Located in Maai Mahiu along the Nairobi-Naivasha SGR line Competitive power tariffs Planned 5,000 acre expansion
	Olkaria SEZ Nakuru 8,292 acres	Leverages geothermal power and hosts KenGen's Green Energy Park
	Riwa SEZ Homa Bay 530 acres	13 KM from the CBD 8 industrial, sector-based zones planned

18,000 acres of public SEZ and industrial park land
47 CAIPs in development

1. At different stages of development (e.g., Konza Technopolis is operational, Dongo and Naivasha are under construction)

Source: SEZA, EPZA

Private SEZs and industrial parks are also available in Kenya

Example parks¹

	<p>Vipingo SEZ Kilifi 2,000 acres</p>		<p>Plug-and-play industrial park in Kilifi County focused on green energy solutions</p>
	<p>Two Rivers Financial Center Nairobi 64 acres</p>		<p>Access to international markets for global, regional, and Kenyan service-oriented business enterprises</p>
	<p>Tatu City Kiambu 5,000 acres</p>		<p>Mixed-use special economic zone</p>
	<p>Northlands SEZ Kiambu 528 acres</p>		<p>Private SEZ located in Ruiru, Kiambu County</p>
	<p>Infinity IP Nairobi 200 acres</p>		<p>Private IP for SMEs located 10 km from Jomo Kenyatta International Airport and 20 km from Nairobi's City Center</p>
	<p>Mount Kipipiri Golf and Resort Nyandarua 1.478 acres</p>		<p>Megaproject in Kipipiri, Nyandarua</p>

Source: SEZA, EPZA


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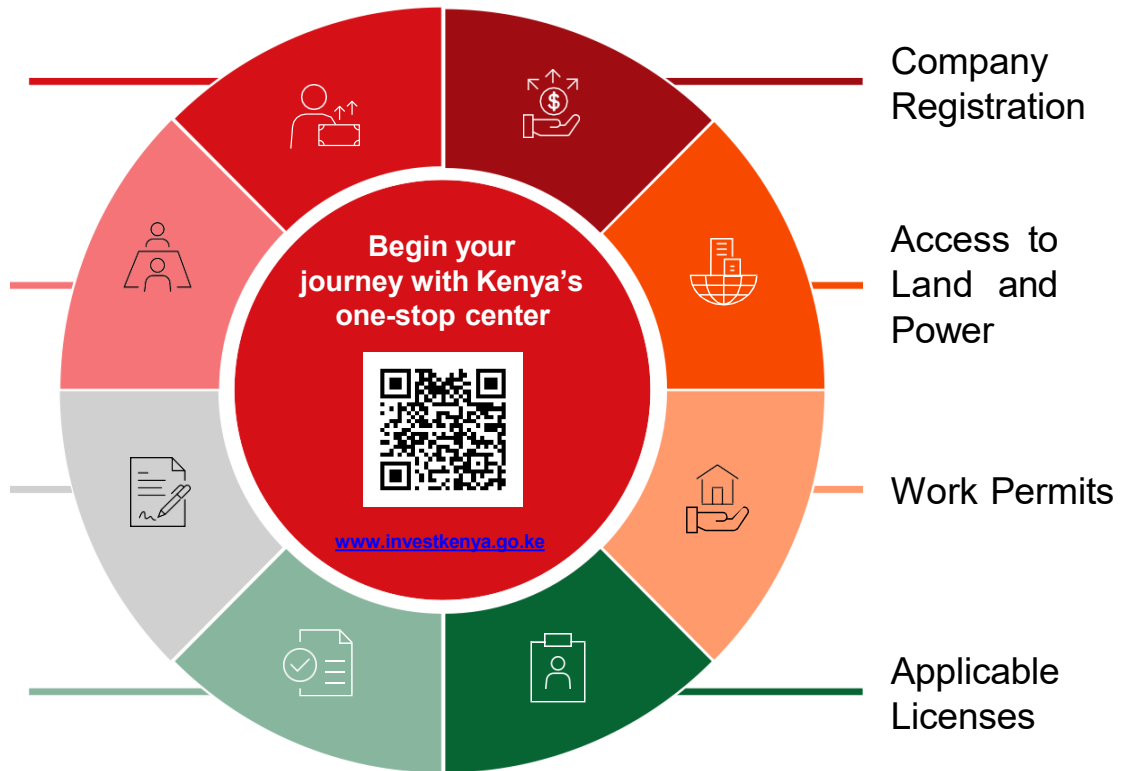
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#1 Source of Investment Data

Business Climate support

Investment Deal-room

EPZ and SEZ set up



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